



# New Year Rollover

Session 990

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# Prior to Rollover

## Important Dates

- Last day of school
- First day of upcoming school year
- Date to re-open parent/student portal
- Date to re-open teacher portal



# Prior to Rollover

## Summer School

- Is the district running summer school?
- When does summer school begin?
- Is Summer in one block of days?
- When does Summer School end and how much time is needed after?
- Recommendation is to run it in the current database

<https://support.aeries.com/support/solutions/articles/14000069026-summer-school-overview>





# Prior to Rollover

## Data Confirmation

- Is the district running Parent Data Confirmation? What are the dates?

## End of Year Reporting

- Where are you at with your end of year reporting?
- Try to minimize the need for duplicate data entry!



# Prior to Rollover

## Next School and Next Grade

- Populate all next school (STU.NS)
- Populate all next grade (STU.NG)
- All Pre-enrolled students will remain at the school they are pre-enrolled in
- Students with the highest grade plus one will not rollover



# Prior to Rollover

## New School and/or Grade levels

- Will there be a new school opening next year?
  - Add site to LOC in the current year
- If a Grade level is being added, change the grade level in the current year
- If a Grade level is being removed, change the grade level in the new school year (after rollover).





# Prior to Rollover

## Finalize Grading

- Copy GRD to GRH and HIS
- If using Standard based grades, copy SBG to SBH
- Run Report Card History (optional)



# Prior to Rollover

Verify previous year settings

- ROL table
- Confirm use of “Next fields”

Test Rollover

- Test the rollover process by running on a sandbox prior to your rollover (optional)





# Prior to Rollover

## Optional Rollover fields

- Master Schedule (MST), School Based Option
- Section (SEC), School Based Option
- Daily Medical Log (MED), District Option
- Attendance Notes (ATN), District Option
- Teacher Files (TFL), District Option
- Student Files (SFL), District Option
- Fees and Fines (FEE), District Option
- Free and Reduced (FRE), District Option
- Streets (STR), if updates are needed have these in place and adjust the rollover option



# Prior to Rollover

## School Based Settings

- Be sure that each school is updated with the appropriate rollover settings for that school
- The Inactive school does not need special School Based Rollover settings configured apart from the 'Only copy Student records under 25 years of age' option. All other School Based settings are ignored when a student is copied to the Inactive school.
- Information on these options can be found at:  
<https://support.aeries.com/support/solutions/articles/14000137992-new-year-rollover-process-guide>



# Prior to Rollover

## Pre-Rollover Audit listing

- Run continuously throughout the preparation time
  - <https://support.aeries.com/support/solutions/articles/14000067767-pre-rollover-audit-listing-report> (This is the hosted checklist, but still handy)
- Make sure to understand items on the report and their significance as some may not need to be cleared.
- Run one last time before rollover as a check





# Prior to Rollover

## Database Maintenance Functions

- Database Cleanup
- Launch Fix ENR process
- Force Cascading Delete Tags



# Prior to Rollover

## Work with district and site staff

- Coordinate with staff to schedule the rollover
- Notify staff when Aeries will not be available
- Apply security restrictions (DPT table) before processing the rollover
  - <https://support.aeries.com/support/solutions/articles/14000086719-enable-temporary-security-restrictions>



# Prior to Rollover

## Database Administrator Options

- Enable Query Store (SQL Server 2016 or later is required)
- Enable Compression to Improve IO Performance (SQL Server 2016 or later is required)
  - Read-Only (RO) Compression is enabled on LOG tables.
  - SQL Server 2016 or later is required,
  - or SQL Server 2008-2014 Enterprise or Developer Editions. **NOTE: SQL 2014 End Life in JULY 2024**
  - NOTE: Compression causes a small increase in CPU usage on the SQL Server.





# Prior to Rollover

## Database Administrator Options (continued)

- Copy custom SQL modules
  - Custom SQL modules include objects defined in the sys.sql\_modules system catalog, which includes objects such as functions, stored procedures, triggers, and views
- The Copy custom SQL modules option is not required in order to copy student-related custom tables that are identified in the CTD table. That happens automatically and includes table definition, primary key, foreign key, indexes, check constraints, triggers, and MS\_Description extended properties where applicable.



# Prior to Rollover

## Database Administrator Options (continued)

- Copy custom SQL modules (continued)
  - If a custom View is in the CTD table, the View definition is automatically copied, regardless of the Copy custom SQL modules setting
  - The Rollover will not create custom schemas



# Prior to Rollover

## Database Administrator Options (continued)

- The Rollover ignores errors encountered while copying custom SQL modules. Aeries does not attempt to report these errors to the administrator running the Rollover.
- Aeries cannot guarantee that all custom SQL modules will be copied successfully. It is the responsibility of the database administrator to verify the existence of these modules in the next year database.





# Prior to Rollover

## Plan your time

- Leave plenty of time for the rollover process
- Plan for time to redo if necessary
- Allow for time to check your data after the rollover



# Rollover

## Create the database

- Check space on server
- Must have same suffix as last year and year in the suffix increased by one (DST24000EagleUSD)
- Use SQLMODEL.SQL.TXT from AeriesNetUpdate.zip and run it against the newly created database
- DO NOT ADD THE NEW DATABASE TO THE CONNECTION FILES UNTIL ROLLOVER IS COMPLETE



# Rollover

## Create the database

- Ensure that the administrator performing the Rollover has the Database Owner (DBO) user name and password.
  - Member of the db\_owner database role on both the current and next year databases
  - Has ALTER ANY LOGIN server-level permission
- For districts that use custom SQL modules, if any SQL modules belong to a custom schema or contain references to objects in custom schemas, the database administrator must create the schemas and their objects in the next year database prior to starting the Rollover





# Rollover

What to do if something goes wrong?

- Check the Aeries LOG table
- Check email to see if you received an error message
- See what data copied and what did not, is it a space issue?
- Check the Event Log



# Post Rollover

## Basic Data Checks

- Print and compare table record count reports
  - Check for missing data
    - Print Missing Students Report
  - Check for “reasonable” counts of data
    - Not all records rollover
      - Example: Graduates
  - Compare student record counts by site and grade
    - Print the Active Students by School and Grade Report



# Post Rollover

## Update Config files

- Update all portals and Online Enrollment Config
  - AeriesNetConnections.config
    - <https://support.aeries.com/support/solutions/articles/14000064894-configure-aeries-database-connections-adding-a-new-year>
    - Set Default Year
  - AirConnections.config





# Post Rollover

## Maintenance plans and Backups

- After verifying the counts run a full backup on the new year database
- Adjust any maintenance tasks to cover the new year as well

## Clean up accounts

- Disable or expire any Aeries accounts that are no longer in use
- Disable or expire any SQL accounts that are no longer in use



# Post Rollover

## Update Third Party Integrations

- SQL Jobs
- SSIS Projects
- ODBC connections
- PowerShell & Python Scripts
- Scheduled Tasks



# Post Rollover

## Summer School

- If the rollover takes place prior to the end of summer school
  - Consideration for portal access to summer school
  - Use “Copy Data From Summer School” process
  - <https://support.aeries.com/en/support/solutions/articles/14000103299-copy-data-from-summer-school-information>





# Closing Tips

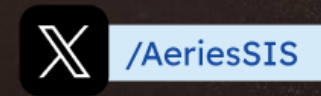
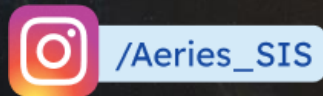
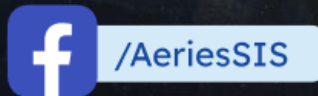
- Plan Ahead and start early.
- Include any site or district staff in the process
- Many site level data tasks need to be completed before the rollover.
- Teach site and district staff to use reports and queries in Aeries to help with their cleanup
- Use Data Validations to help check your data.




# THANK YOU!

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