

## Student Sync/Lock December 10, 2012

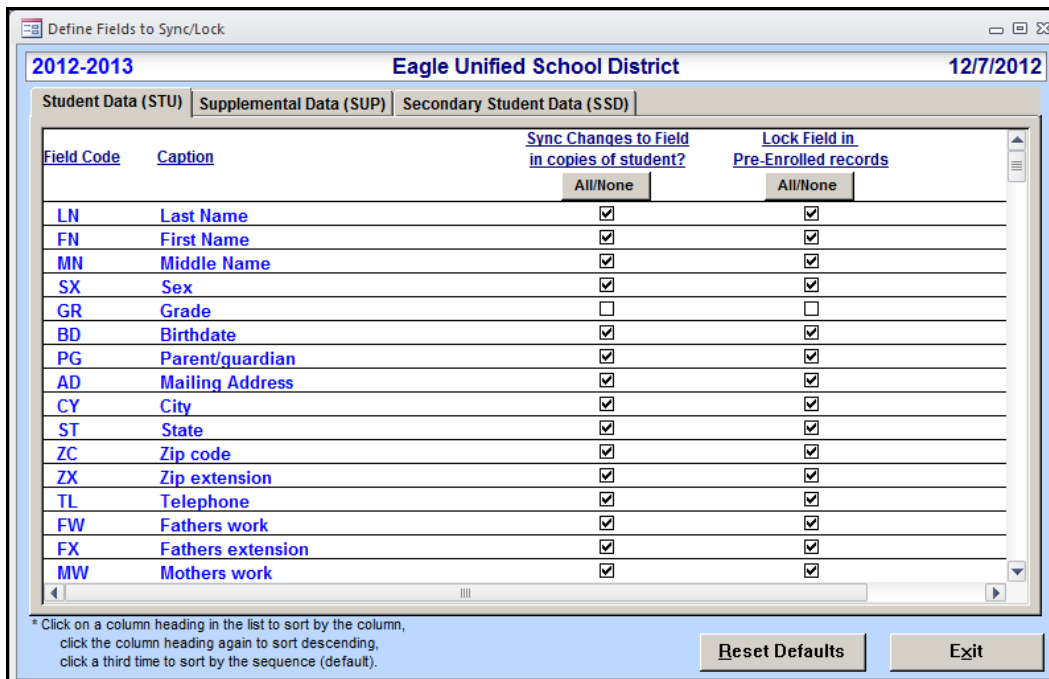
Aeries has a new procedure in place for Client Server districts to synchronize changes to student data throughout the district. Whenever data is changed for a student in one school, those changes can be automatically synced to the active and pre-enrolled copy of the student at another school. This includes fields in the **Students (STU)**, **Supplemental (SUP)** and **Secondary Student Data (SSD)** tables. Each field can be selected to sync or not to sync.

This procedure was developed to help alleviate the necessity of the process of running **Update Student Data** during the rollover process. As long as all allowable tables are set to be ID-based, the essential fields are set to sync, and all matriculating students are pre-enrolled in their next schools, then the **Update Student Data process is no longer needed.**

The process also includes a method with which to lock fields in a pre-enrolled copy of a student. This will keep users at the pre-enrolled school from changing key information such as address or phone numbers. As with the sync process, these fields can be selected to be locked or not.

There are also two new **District Rules** that can be selected to update inactive records in the database or to update active records when changes are made to pre-enrolled records.

The configurations are completely up to the district to decide and can be set on the **Define Fields to Sync/Lock** form in **AdminCS**.



Field Code	Caption	Sync Changes to Field in copies of student?		Lock Field in Pre-Enrolled records	
		All/None	All/None	All/None	All/None
LN	Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FN	First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MN	Middle Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SX	Sex	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GR	Grade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BD	Birthdate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PG	Parent/guardian	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AD	Mailing Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CY	City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ST	State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ZC	Zip code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ZX	Zip extension	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TL	Telephone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FW	Fathers work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FX	Fathers extension	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MW	Mothers work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

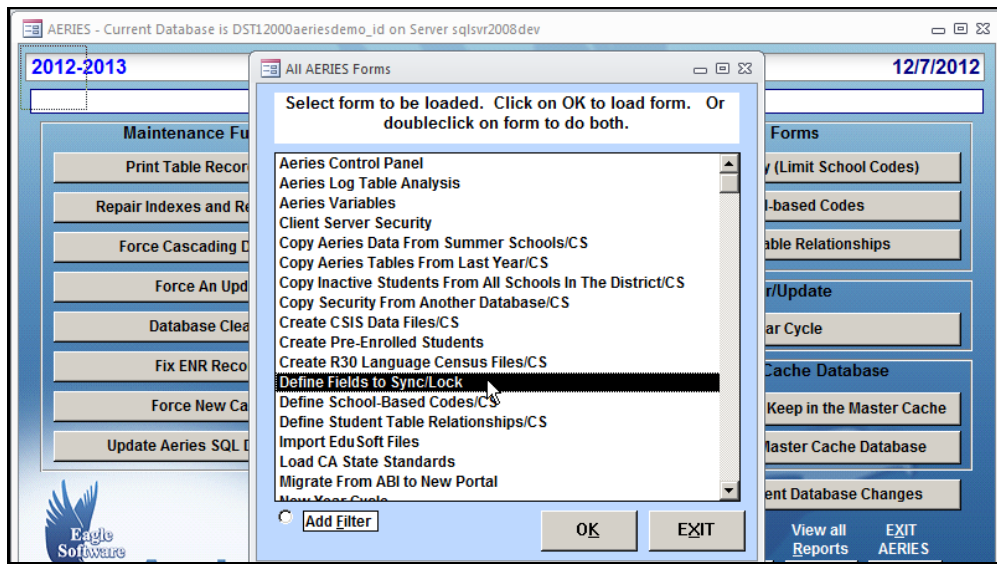
\* Click on a column heading in the list to sort by the column, click the column heading again to sort descending, click a third time to sort by the sequence (default).



**NOTE:** To disable this new feature, ALL of the Sync fields can be de-selected

## DEFINE FIELDS TO SYNC/LOCK FORM

The **Define Fields to Sync/Lock** form is available in **AdminCS** through **View all Forms**.



The following form will display.

The screenshot shows the 'Define Fields to Sync/Lock' form for Eagle Unified School District. The form has three tabs: 'Student Data (STU)', 'Supplemental Data (SUP)', and 'Secondary Student Data (SSD)'. The 'Student Data (STU)' tab is active, displaying a table of fields with checkboxes for 'Sync Changes to Field in copies of student?' and 'Lock Field in Pre-Enrolled records?'.

Field Code	Caption	Sync Changes to Field in copies of student?		Lock Field in Pre-Enrolled records?	
		All	None	All	None
LN	Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FN	First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MN	Middle Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SX	Sex	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
GR	Grade	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BD	Birthdate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PG	Parent/guardian	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AD	Mailing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CY	City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ST	State	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ZC	Zip code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ZX	Zip extension	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TL	Telephone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FW	Fathers work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FX	Fathers extension	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MW	Mothers work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

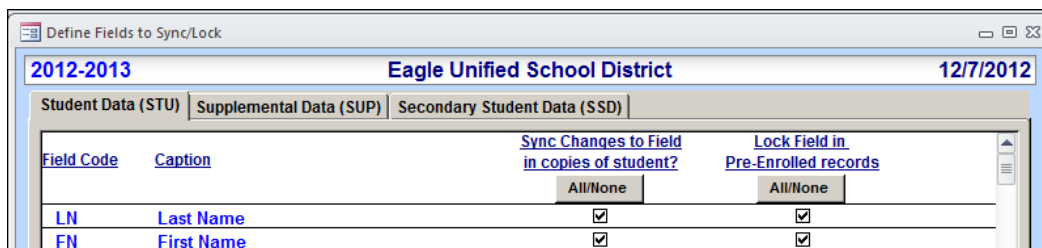
\* Click on a column heading in the list to sort by the column, click the column heading again to sort descending, click a third time to sort by the sequence (default).

Buttons: Reset Defaults, Exit

There are 3 tabs on the **Define Fields to Sync/Lock** form, **Student Data (STU)**, **Supplemental Data (SUP)**, and **Secondary Student Data (SSD)**.

All the fields will default to ON except for certain **Student Data (STU)** fields that could be school specific. Some examples of the fields that do not default to ON are Grade (GR), Enter Date (ED), GPAs and Student Program (SP).

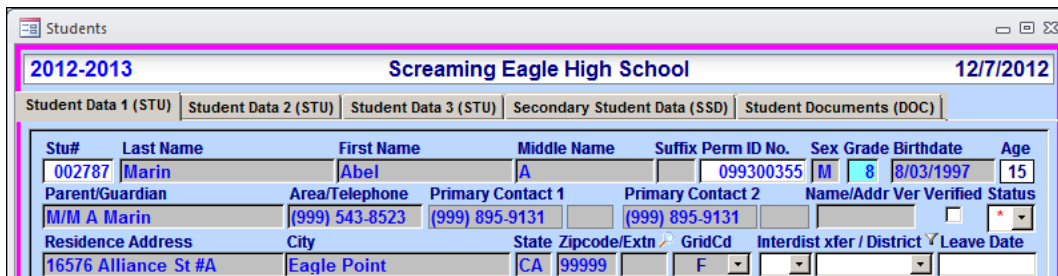
There are 2 columns for each tab. A **Sync Changes to Field in copies of student?** column and a **Lock Field in Pre-Enrolled records** column.



The **Sync Changes to Field in copies of student?** column will allow changes to a students record to update any active or pre-Enrolled record for the same student.

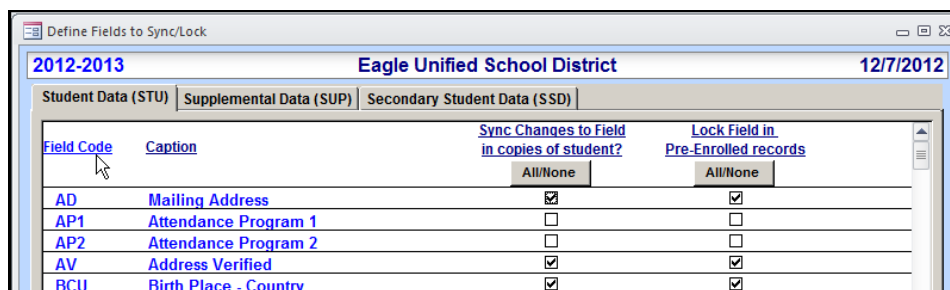
The **Lock Field in Pre-Enrolled records** column will lock the fields at the pre-enrolled school. This will prevent users at the pre-enrolled school from changing key information such as address or phone numbers. As with the sync process, these fields can be selected to be locked or not.

When the fields are selected to be locked they will display as read-only at the pre-enrolled school and cannot be changed. Below is an example of a pre-enrolled 8<sup>th</sup> grade student with various STU fields selected to lock. Note the fields are displayed in gray.



The **All/None** buttons on each column can be used to quickly turn off or on all fields. If all fields are de-selected, this will disable the syncing feature.

All columns can be sorted by clicking on the column heading. Click once to sort ascending then again to sort descending. Clicking a third time will sort by the default fields.



## DISTRICT RULES

There are two new district rules in the district database. Both rules default to OFF.

School Rules Student Rules Student Address Rules Other Student Rules

- Link Primary Contacts (STU.FW / STU.MW) from Emergency Contacts form.
- Display Verification Pass Code (STU.VPC) on Students form - Student Data 2 (STU) tab
- Force use of District Student Lookup when adding a student.
- Force use of Student Enrollment Form when adding a student.
- Force new student number (STU.SN) when transferring a student.
- Update inactive student records when changes are made to active copies of that student.
- Update student records when changes are made to pre-enrolled copies of that student.

LOCATE UPDATE OTHER

Backward Get Forward Add Change Delete Push Print eXit Help

- **Update inactive student records when changes are made to active copies of that student -**  
If this rule is selected, changes made to active student records will also change inactive records throughout the database including records in an Inactive school.
- **Update student records when changes are made to pre-enrolled copies of that student –**  
If this rule is selected, changes made to the pre-enrolled records will update the active records. The fields must not be locked on the **Define Fields to Sync/Lock** form in the **Lock Field in Pre-Enrolled records** column.