



ProgressBook StudentInformation Student Promotion Guide



StudentInformation

ProgressBook StudentInformation Student Promotion Guide

(This document is current for v17.1.0 or later.)

© 2021 Software Answers, LLC. All Rights Reserved. All other company and product names included in this material may be Trademarks, Registered Trademarks, or Service Marks of the companies with which they are associated. Software Answers, LLC reserves the right at any time and without notice to change these materials or any of the functions, features, or specifications of any of the software described herein.

Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation Student Promotion Guide* have been made.

Product Version	Heading	Page	Reason
17.1.0	<i>"Select Default Building Progression Track"</i>	7	Updated images and text to reflect the change of DASL Options to StudentInformation Options .

Table of Contents

Change Log	i
Table of Contents	ii
Overview	1
Set Building Progression Tracks	2
Maintain Building Progression Tracks.....	2
Add Building Progression Tracks	2
Edit Building Progression Tracks	4
Delete Building Progression Tracks	6
Select Default Building Progression Track.....	7
Bulk Assign Students to Building Progression Tracks.....	8
Run Student Promotion	10
Promote Students	10
Bulk Enroll Students.....	13
Student Data Tasks.....	17

Overview

This guide explains student promotion in StudentInformation. Student promotion is the process of creating admission records for students in the next school year. To do this, you first promote students in the current school/school year and then bulk enroll them in the next school/school year. StudentInformation includes building progression tracks to which you can assign students to indicate their expected path through schools within a district (for example, from an elementary school to a specific middle school and then high school).

Refer to the appropriate section as follows:

- For information on creating and maintaining building progression tracks and assigning them to students, see [“Set Building Progression Tracks.”](#)
- For information on the student promotion process, see [“Run Student Promotion.”](#)

Set Building Progression Tracks

Building progression tracks indicate students' expected path through schools within a district (for example, from an elementary school to a specific middle school and then high school). You can create different tracks and select a default track. You then assign students to a track.

- To create and maintain tracks, see [“Maintain Building Progression Tracks.”](#)
- To set a default track, see, [“Select Default Building Progression Track.”](#)
- To assign students to a track, see [“Bulk Assign Students to Building Progression Tracks.”](#)

Maintain Building Progression Tracks

You can maintain building progression tracks at the district level only. Refer to the appropriate section as follows:

- [“Add Building Progression Tracks.”](#)
- [“Edit Building Progression Tracks.”](#)
- [“Delete Building Progression Tracks.”](#)

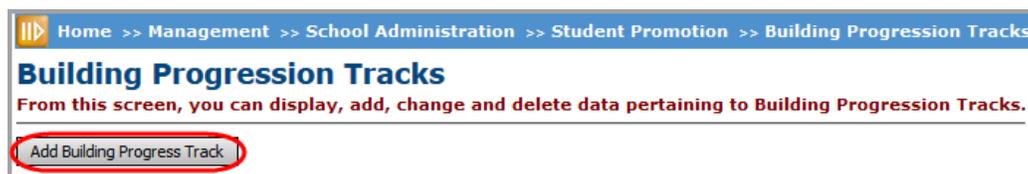
Note: For more information on setting up district and building grade level codes and grade level progressions, see *ProgressBook StudentInformation School Year Setup and Configuration Guide*.

Add Building Progression Tracks

Navigation: StudentInformation > Management > School Administration > Student Promotion > Building Progression Tracks

You can create as many building progression tracks as needed to account for all of the building progressions that can occur in your district. You should create at least one progression track for each elementary school in the district.

1. With the district in context on the **Building Progression Tracks** screen, click **Add Building Progress Track**.



Add Building Progression Tracks

The add/edit version of the screen displays.

2. Enter a **Code** and **Name** for this track.
3. Optional: Enter a **Description** of this track.

- Optional: If you do not want this track to be currently active, deselect the **Is Active** checkbox.

Note: You cannot assign students to inactive tracks.

- In the row of each grade level, in the **Building/School** drop-down list, select the school that students attend at the grade level. (For example, if you are creating a track for students starting at a particular elementary school, in the rows of the elementary grades, select that school. Then in the rows of the higher grades, select the schools that students from that elementary school will attend in those grades.)
- Click **Save**. Or, to continue adding building progression tracks, click **Save and New**.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Code: ⚡

Name: ⚡

Description:

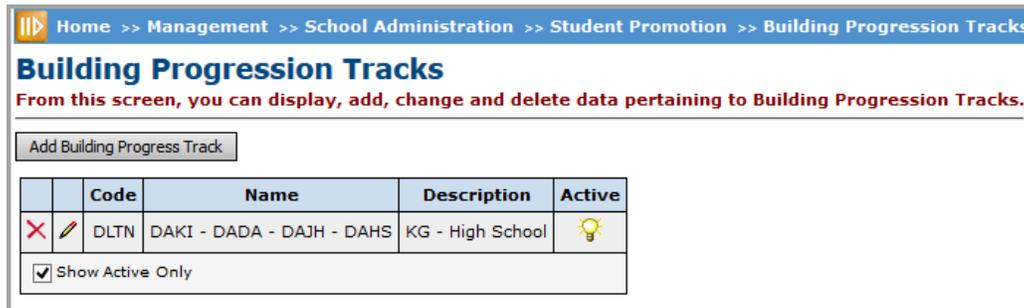
Is Active:

Grade Level Code	Building/ School
PS	KIDRON ELEMENTARY ▾
KG	KIDRON ELEMENTARY ▾
01	KIDRON ELEMENTARY ▾
02	KIDRON ELEMENTARY ▾
03	DALTON ELEMENTARY ▾
04	DALTON ELEMENTARY ▾
05	DALTON INTERMEDIATE ▾
06	DALTON INTERMEDIATE ▾
07	DALTON INTERMEDIATE ▾
08	DALTON INTERMEDIATE ▾
09	DALTON HIGH SCHOOL ▾
10	DALTON HIGH SCHOOL ▾
11	DALTON HIGH SCHOOL ▾
12	DALTON HIGH SCHOOL ▾
GR	▾
UG	▾
13	▾
DR-D	▾
**	▾
23	▾

20 Records Displayed [Back To Top](#)

Add Building Progression Track

The newly created building progression track displays.



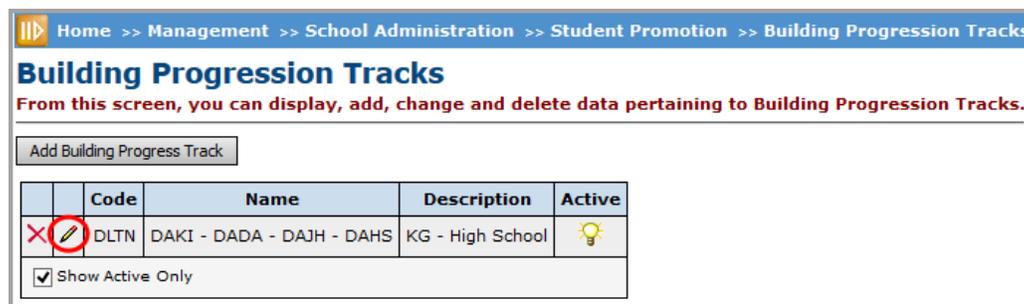
Building Progression Track Added

Note: Inactive tracks only display if you deselect the **Show Active Only** checkbox.

Edit Building Progression Tracks

Navigation: StudentInformation > Management > School Administration > Student Promotion > Building Progression Tracks

1. With the district in context on the **Building Progression Tracks** screen, in the row of the building progression track you want to edit, click .



Edit Building Progression Tracks

The add/edit version of the screen displays.

2. Make any desired changes, and click **Save**.

Note: For more information about the fields on this screen, see [“Add Building Progression Tracks.”](#)

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Code: DLTN

Name: DAKI - DADA - DAJH - DAHS

Description: Kindergarten - High School

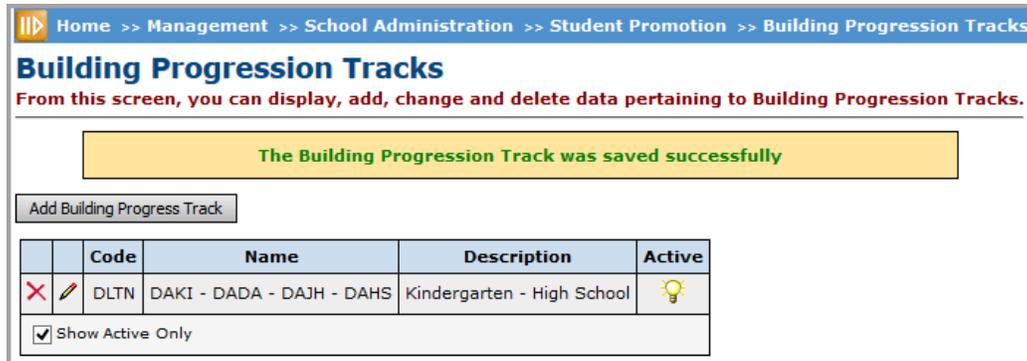
Is Active:

Grade Level Code	Building/ School
PS	KIDRON ELEMENTARY
KG	KIDRON ELEMENTARY
01	KIDRON ELEMENTARY
02	KIDRON ELEMENTARY
03	DALTON ELEMENTARY
04	DALTON ELEMENTARY
05	DALTON INTERMEDIATE
06	DALTON INTERMEDIATE
07	DALTON INTERMEDIATE
08	DALTON INTERMEDIATE
09	DALTON HIGH SCHOOL
10	DALTON HIGH SCHOOL
11	DALTON HIGH SCHOOL
12	DALTON HIGH SCHOOL
GR	
UG	
13	
DR-D	
**	
23	

20 Records Displayed [Back To Top](#)

Edit Building Progression Track

A confirmation message displays, and the edited building progression track displays in the list.

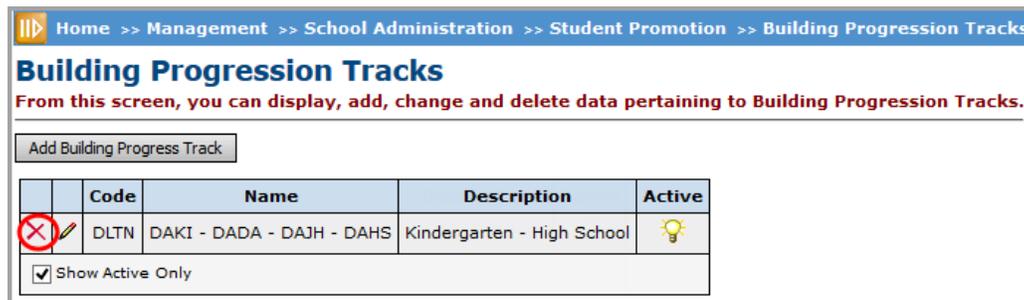


Confirmation of Edited Building Progression Track

Delete Building Progression Tracks

Navigation: StudentInformation > Management > School Administration > Student Promotion > Building Progression Tracks

1. With the district in context on the **Building Progression Tracks** screen, in the row of the building progression track you want to delete, click .



Delete Building Progression Tracks

A message displays, asking if you are sure you want to delete the building progression track.

2. Optional: If students are currently assigned to the track you are deleting (as indicated by the "Students Assigned = " line) and your district has another track to which you want to assign the students, in the **Assign Students To Track** drop-down list, select the track.
3. Click **Ok**.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

Are you sure you want to delete this track?
DLTN - DAKI - DADA - DAJH - DAHS

Students Assigned = 1870

Assign Students To Track: Unassign ▼

Ok Cancel

Confirm Delete

A confirmation message displays, and the building progression track no longer displays.

Home >> Management >> School Administration >> Student Promotion >> Building Progression Tracks

Building Progression Tracks

From this screen, you can display, add, change and delete data pertaining to Building Progression Tracks.

The selected Building Progression Track was successfully deleted

Confirmation of Deleted Building Progression Track

Select Default Building Progression Track

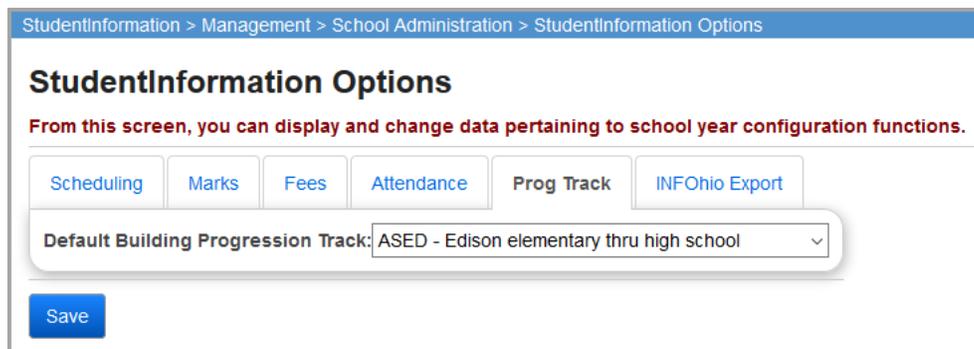
Navigation: StudentInformation > Management > School Administration > StudentInformation Options

You can select a default building progression track at the building level. This is the track to which you want to assign new students at registration.

Note: *If your district has several building progression tracks, it is recommended that you do not set a default track.*

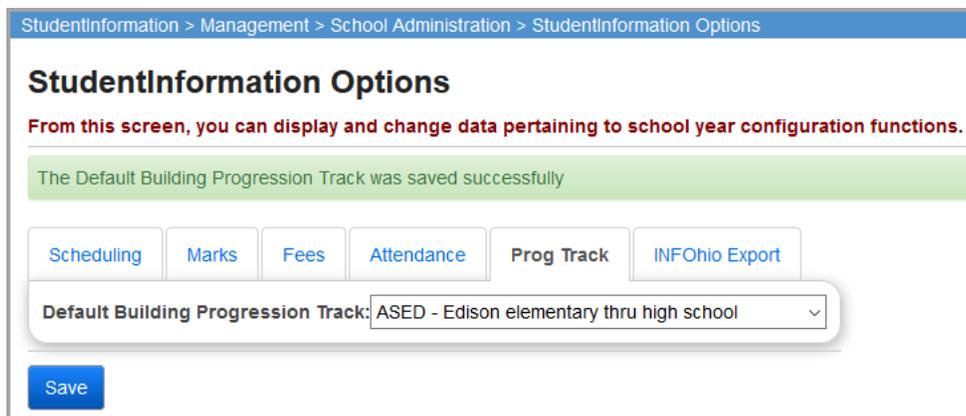
1. With the building in context on the **StudentInformation Options** screen, click the **Prog Track** tab.
2. In the **Default Building Progression Track** drop-down list, select the default track to use when registering new students.

3. Click **Save**.



The screenshot shows the 'StudentInformation Options' page. At the top, there is a breadcrumb trail: 'StudentInformation > Management > School Administration > StudentInformation Options'. Below this is the title 'StudentInformation Options' and a sub-header: 'From this screen, you can display and change data pertaining to school year configuration functions.' There are six tabs: 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', and 'INFOhio Export'. The 'Prog Track' tab is selected. Below the tabs is a dropdown menu labeled 'Default Building Progression Track:' with the selected value 'ASED - Edison elementary thru high school'. A blue 'Save' button is located at the bottom left of the form area.

A confirmation message displays, and the selected track now defaults when you register new students.



This screenshot is identical to the previous one, but it includes a green confirmation message box that reads: 'The Default Building Progression Track was saved successfully'. The 'Save' button is now disabled.

Bulk Assign Students to Building Progression Tracks

Navigation: StudentInformation > Management > School Administration > Student Promotion > Bulk Assign Building Progression Track

At the building level, you can assign many students to a building progression track at once based on an ad-hoc membership.

Note: You can also set building progression tracks during the student promotion process. For details, see [“Run Student Promotion.”](#)

1. With the building in context on the **Bulk Assign Building Progression Track** screen, select the **Ad-Hoc Membership** that includes the students you want to bulk assign to a building progression track.

Note: To find or build an ad-hoc membership, click . (For more information on setting up ad-hoc memberships, see *ProgressBook StudentInformation Getting Started Guide*.)

2. Select the **Building Progression Track** to which you want to assign students in the selected ad-hoc membership.
3. Optional: If you want to override any previous building progression track assignments for these students, select the **Override Existing Tracks** checkbox. (If you leave this checkbox deselected, StudentInformation only assigns to this building progression track any students in the ad-hoc membership who are not currently assigned to a track.)
4. Click **Assign**.

A confirmation message displays, indicating that StudentInformation has assigned the students in the ad-hoc membership to the selected building progression track.

StudentInformation also updates the students' building progression track on the student profile.

Run Student Promotion

Student promotion is the process of creating admission records for students in the next school year. To do this, you first promote students in the current school/school year and then bulk enroll them in the next school/school year.

Refer to the appropriate topic as follows:

- [“Promote Students”](#)
- [“Bulk Enroll Students”](#)
- [“Student Data Tasks”](#)

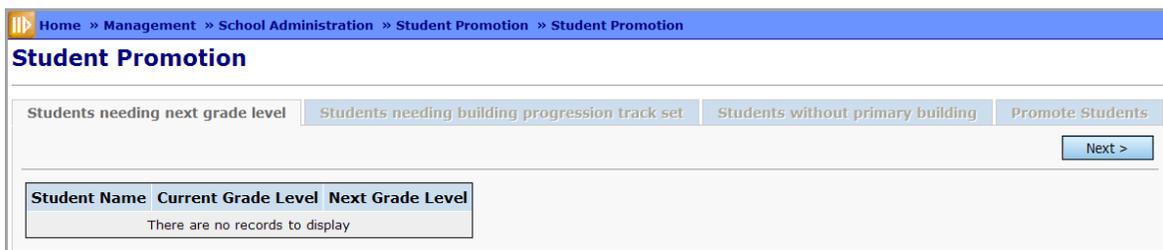
Promote Students

Navigation: StudentInformation > Management > School Administration > Student Promotion > Student Promotion

Each year you must promote all students who pass their grades to the next grade level. This process uses the students’ grade level next year and their building progression track to determine and set the school the student will attend during the upcoming school year. You can run this process many times while preparing for the new school year (up until the day the new school year begins).

Note: *You should complete the student promotion process in all buildings in the same order in which the buildings appear on building progression tracks (typically elementary schools first, then middle schools and then high schools).*

1. With the current school and school year in context on the **Student Promotion** screen, review the **Students needing next grade level** tab to determine if any students display, which indicates their next grade level is not set.
2. Optional: If students need their grade levels set, in the **Next Grade Level** drop-down list of each student, select the student’s correct next grade level.
3. Click **Next**.



4. Review the **Students needing building progression track set** tab to determine if any students display, which indicates their building progression track is not set.

- Optional: If students need their building progression tracks set, in the **Building Progression Track** drop-down list of each student, select the student's correct building progression track.
- Click **Next**.

The screenshot shows the 'Student Promotion' screen with the 'Students needing building progression track set' tab selected. A table displays one student record:

Student Name	Student Address	Building Progression Track
Student42480, RICHARD	645 S Main St	District Track

- Review the **Students without primary building** tab to determine if any students display, which indicates their primary building is set to the district.

Note: There are very limited EMIS situations that allow you to set a student's primary building to the district. However, if the primary building is set to the district, StudentInformation does not promote the student.

- Optional: If you need to promote students who have their primary building set to the district, you must correct the primary building for these students on the student profile (**Additional** tab). Then return to the **Student Promotion** screen.
- Click **Next**.

The screenshot shows the 'Student Promotion' screen with the 'Promote Students' tab selected. A table displays a list of students:

Update	Student Number	Student Name	Status	Current Grade Level	Next Grade Level	Building Progression Track
<input type="checkbox"/>	98273	Student61954, ALEX	I - INACTIVE	12	GR	Elida District Track
<input type="checkbox"/>	98246	Student61982, MALLORY	A - ACTIVE RES	09	10	
<input type="checkbox"/>	98245	Student61984, BRADLEY	I - INACTIVE	11	12	Elida District Track
<input type="checkbox"/>	12554	Student73882, ANDREW	I - INACTIVE	10	11	Elida District Track
<input type="checkbox"/>	11314	Student78071, CHRISTOPHER	I - INACTIVE	11	12	Elida District Track

- On the **Promote Students** tab, review the list of students and the details related to their promotion.

Note: The student promotion and bulk enrollment processes populate the **New School** and **Enrolled Next Year** fields. If you are running student promotion for the first time this year, these fields are typically blank. However, the **New School** field could contain data for a student if you previously set this value for the student on the student profile or as part of a student profile bulk update. In this case, the student promotion process resets any previously set values. If you want to return to the original values, after you run student promotion, go back and reenter these values on the student profile or through the student profile bulk update.

The list of students displays based on the following criteria:

- Students have an enrollment in the school/school year in context (student annual record).
- Enrollment in the current school/school year is the students' primary building enrollment (as set on the student profile).
- Students are active (not withdrawn) on an attendance calendar.
- Students' progression track forecasted grade level is not "GR."

11. Click **Promote**.

The screenshot shows the 'Student Promotion' interface. At the top, there is a breadcrumb trail: Home » Management » School Administration » Student Promotion » Student Promotion. Below this is the title 'Student Promotion'. There are four tabs: 'Students needing next grade level', 'Students needing building progression track set', 'Students without primary building', and 'Promote Students'. The 'Promote Students' tab is active. Below the tabs are two buttons: '< Back' and 'Promote'. A table displays the following data:

Number	Student Name ^	Grade	Next Grade	Prog. Track	New School	Enrolled Next Year
13513	Student14257, DELQUAN	09	10	District Track		
13512	Student14258, TANISHA	09	10	District Track		
13511	Student14260, KASSEE	09	10	District Track		
13510	Student14262, MARCUS	09	10	District Track		
13509	Student14264, BRITTANY	09	10	District Track		

A confirmation message displays, and StudentInformation promotes the students based on their grade level and progression track, determining which school they will attend in the upcoming year. (This value now displays in the **New School** field of both the **Promote Students** tab and the student profile **Additional** tab.)

Bulk Enroll Students

Navigation: StudentInformation > Management > School Administration > Student Promotion > Student Bulk Enrollment

Note: Before running this process, you must first promote students from the current school year. (See “[Promote Students.](#)”) You must also run the school year initialization process on the upcoming school year. (For more information, see *ProgressBook StudentInformation School Year Initialization Guide.*) After completing the bulk enrollment process, you can change certain enrollment options up until the first day of the new school year. (See “[Student Data Tasks.](#)”)

After promoting students, you need to bulk enroll the students in the next school year. This process creates a new student admission record for these students. You can run this process many times while preparing for the new school year (up until the day the new school year begins).

Note: You should complete the bulk enrollment process in all buildings in the same order in which you promote students (typically elementary schools first, then middle schools and then high schools).

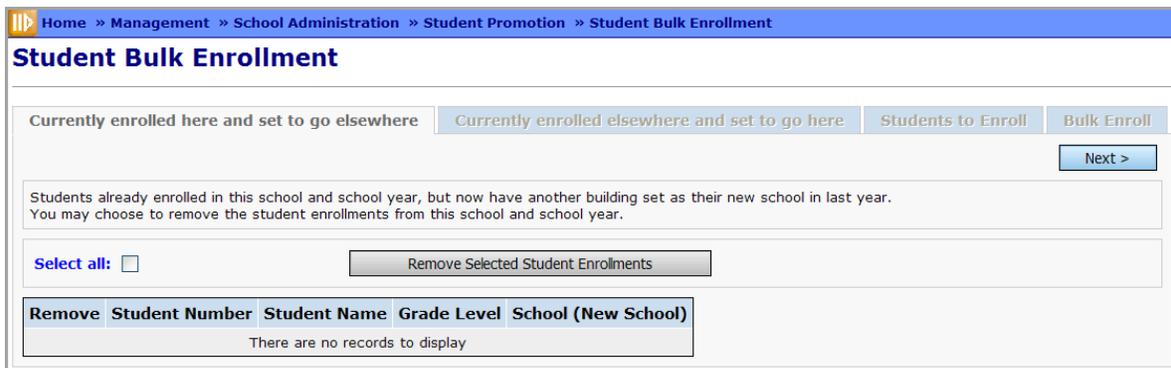
1. With the future school and school year in context on the **Student Bulk Enrollment** screen, review the **Currently enrolled here and set to go elsewhere** tab to determine if any students display, which indicates the students are enrolled in this building but should not be because they have a different building set as their next school.

Note: This can occur if someone mistakenly sets the students’ new school values and processes bulk enrollment during the new school year setup. In that case, even though in the prior year the students had a different building set as their next school, they are incorrectly enrolled in this building.

2. Optional: If there are students in this list, you may remove them from the current building for the new school year. To do this, select the **Remove** checkbox for the student(s) you want to remove (or **Select all**), and then click **Remove Selected Student Enrollments**.

Note: This step completely removes the students’ records from the school/school year in context, including course history, absences, alerts, discipline, fees and grades. It also deletes EMIS records if the school is the last enrollment in the district for the school year.

3. Click **Next**.

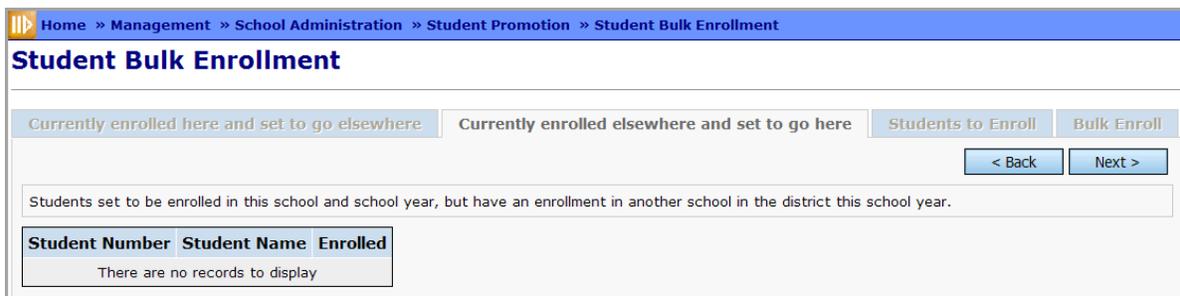


Student Bulk Enrollment – Currently Enrolled Here and Set to Go Elsewhere

4. Review the **Currently enrolled elsewhere and set to go here** tab to determine if any students display, which indicates they have this building set as their next school but are enrolled elsewhere in the district for the upcoming school year.

***Note:** You cannot include these students in the bulk enrollment into this building until the other school removes their enrollment.*

5. Contact the other school to resolve this issue. (You can run bulk enrollment again once it is resolved.)
6. Click **Next**.



7. Review the **Students to Enroll** tab to view a list of students set to be enrolled at this building in the upcoming school year who do not have an enrollment in another building in the district and school year in context. Students display in this list based on the following criteria:
 - They have the school in context set as the **New School** on their student profile in the prior year.
 - They have an active calendar admission in the prior school year (that is, not withdrawn) as of the date you run this bulk enrollment.
 - They are not enrolled in another building in the district in the upcoming school year.
8. Optional: To filter the list by prior school, in the **Show Only Students In Prior School** drop-down list, select the prior school.
9. Optional: To filter the list by prior grade level, in the **Show Only Students In Prior Grade Level** drop-down list, select the prior grade level.

10. Select the checkbox for the student(s) you want to enroll (or **Select All**).
11. Click **Next**.

Home » Management » School Administration » Student Promotion » Student Bulk Enrollment

Student Bulk Enrollment

Currently enrolled here and set to go elsewhere Currently enrolled elsewhere and set to go here **Students to Enroll** Bulk Enroll

< Back Next >

Students set to be enrolled this school and school year. You must select the students you would like to enroll.

Show Only Students In Prior School: [Show All] **Show Only Students In Prior Grade Level:** [Show All]

Select All:

Student Number	Student Name	Admitting From	Prior Grade Level	Current Grade Level	Student Status
<input type="checkbox"/> 99914	Student86552, LOGAN	HIGH SCHOOL	09	10	OTH RESIDE
<input type="checkbox"/> 99908	Student86555, RICHARD	HIGH SCHOOL	11	12	ACTIVE RES
<input type="checkbox"/> 99904	Student86559, BROOKE	HIGH SCHOOL	11	12	ACTIVE RES
<input type="checkbox"/> 1571	Student88646, CHELSEA	HIGH SCHOOL	07	08	ACTIVE RES

12. On the **Bulk Enroll** tab, in the **Enrollment Options** section, indicate which of the following options you want to apply to this bulk enrollment by selecting the related checkbox:
 - **Copy Locker Assignments** – copies the students' locker assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Free Lunch Status Assignments** – copies the students' free lunch status assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Counselor Assignments** – copies the students' counselor assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Transportation Assignments** – copies information from the **Transportation** tab of student profiles to the next school/school year (only if previous and next schools are identical)
 - **Clear All Data Flags** – clears (does not carry forward) all data values on the **Student Profile** to the new school year student record
 - **Clear Homerooms** – clears (does not carry forward) student homeroom assignments to the next school/school year (If deselected, only copies homerooms if previous and next schools are identical)
13. In the **Map Sub-Calendars** section, in the **Current Calendar** list, review the attendance calendars to which students being promoted are currently assigned and the number of students assigned to each.
14. For each **Current Calendar**, in the **Calendar to Assign** drop-down list, select the attendance calendar to assign to all students included in this bulk enrollment. (If you do not want to promote students with a specific **Current Calendar**, select "-- DO NOT ENROLL --.")

Note: In most cases, you map students to the same calendar. An example of an exception would be mapping current Kindergarten students from a half day calendar to a default (full day) calendar for the next year as 1st grade students.

Your selection in each **Calendar to Assign** drop-down list causes the associated **Attendance Pattern** to display. (It is also used on the student’s profile as both the **Attendance Calendar** on the **General** tab and the **Reporting Calendar** on the **FD-Attributes** tab.)

15. In the **Map Student Statuses** section, in the **Current Status** list, review the current statuses of all students being promoted and the number of students with each status.
16. For each **Current Status**, in the **Status to Assign** drop-down list, select the student status to assign to all students included in this bulk enrollment. (If you do not want to promote students with a specific **Current Status**, such as Withdrawn or Deleted, select “-- DO NOT ENROLL --.”)

Note: In most cases, you map students to the same status.

17. Click **Process Bulk Enrollment**.

A confirmation message displays, and StudentInformation processes the student bulk enrollment.

18. Optional: Check the status of the bulk enrollment on the **Batch/Report Management** screen.

DASL		Batch/Report Management		1/20/2010 12:35:41 PM	
Display:	All	Refresh Display			
Job Type	Job Name	Job Description	Job Status	School Name	Date Added
Students Batch Process	DASL_STUDENT	DASL Students Batch Process	Complete	HIGH SCHOOL	1/20/2010 12:35:00 PM
Close Clear All Items Clear Selected Items Refresh Display					

Note: When you promote students, any student alerts with an empty stop date go forward into the next school year. However, memberships are school year specific and do not copy to the next year.

The student bulk enrollment process creates the following student EMIS records:

- FS Student Standing record for new school year with effective date of July 1
- FD Attributes Effective Date record for new school year with effective date of July 1
- FN Attributes No Date record for new school year

Student Data Tasks

Navigation: StudentInformation > Management > School Administration > Student Promotion > Student Data Tasks

After promoting students to the next school or school year, and subsequent to running bulk enrollments (see [“Bulk Enroll Students”](#)), you can change certain bulk enrollment options from the **Student Data Tasks** screen.

You can copy enrollment options from the previous school and school year to the current school and school year. You can also delete enrollment options from a prior or current school or school year. You can run this process multiple times while preparing for the new school year, up until the day the new school year begins.

Note: For the copy function to work, the previous and current schools must be the same school.

StudentInformation > Management > School Administration > Student Promotion > Student Data Tasks [Find Students]

Student Data Tasks

Enrollment Options <input type="checkbox"/>	
Clear Locker Assignments <input type="checkbox"/>	Copy Locker Assignments <input type="checkbox"/>
Clear Homeroom Assignments <input type="checkbox"/>	Copy Homeroom Assignments <input type="checkbox"/>
Clear Data Flags <input type="checkbox"/>	Copy Data Flags <input type="checkbox"/>
Copy Counselor Assignments <input type="checkbox"/>	Copy Transportation Assignments <input type="checkbox"/>
Copy Free Lunch Status <input type="checkbox"/>	

Run Tasks

1. With a school and school year in context on the **Student Data Tasks** screen, select the checkbox for the task(s) you want to run (or select the checkbox in the top row, next to **Enrollment Options**, to select all tasks to run):
 - **Copy Locker Assignments** – copies the students' locker assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Homeroom Assignments** – copies the students' homeroom assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Data Flags** – copies all data values from the **Additional** tab of **Student Profile** screen to the next school year student record
 - **Copy Counselor Assignments** – copies the students' counselor assignments to the next school/school year (only if previous and next schools are identical)
 - **Copy Transportation Assignments** – copies the transportation record from the **Student Profile** screen **Transportation** tab to the next school/school year (only if previous and next schools are identical)
 - **Copy Free Lunch Status Assignments** – copies the students' free lunch status assignments to the next school/school year (only if previous and next schools are identical)
 - **Clear All Data Flags** – clears (does not carry forward) all data values from the student profile screen for the new school year student record
 - **Clear Homerooms** – clears (does not carry forward) student homeroom assignments for the next school/school year (If deselected, assigns homerooms if previous and next schools are identical)
2. Click **Run Tasks**.

Note: When **Clear** and **Copy** tasks are both selected, the clear operation is performed first.

Note: If the year in context is the current school year, the copy tasks copy data from the previous school year. If the year in context is the future school year, the copy tasks copy data from the current school year.

Note: When clear tasks are selected, the year in context is always the year to which they are applied.