

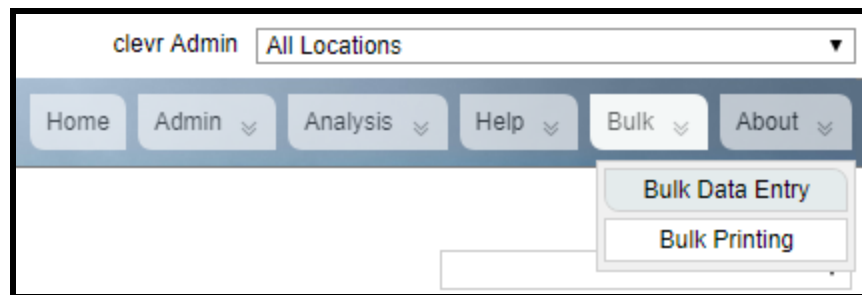
What is a Record Rollover?

A **Record Rollover** is a process used within clevr to archive records. It is typically performed once a year, usually during the summer after data entry within the current school year's records is complete. During a rollover the current record is locked in the Record History and a clone is created to begin a record for the next year or semester. The school year field on the newly cloned record will be changed to the next school year.

Depending on preference, rollover may happen once a year when data entry for a form is complete, or between school semesters. Most districts / divisions opt to rollover records once a year.

How to Perform a Record Rollover

A **Record Rollover** is performed via the **Bulk Data Entry** module. You can access this module on the **Homescreen** via clicking on **Bulk > Bulk Data Entry**.



Note: Rollovers can be performed for all locations at once or school by school. While rolling over records for the entire division at once is the easiest method, if your district is large or has many records you will need to go school by school.

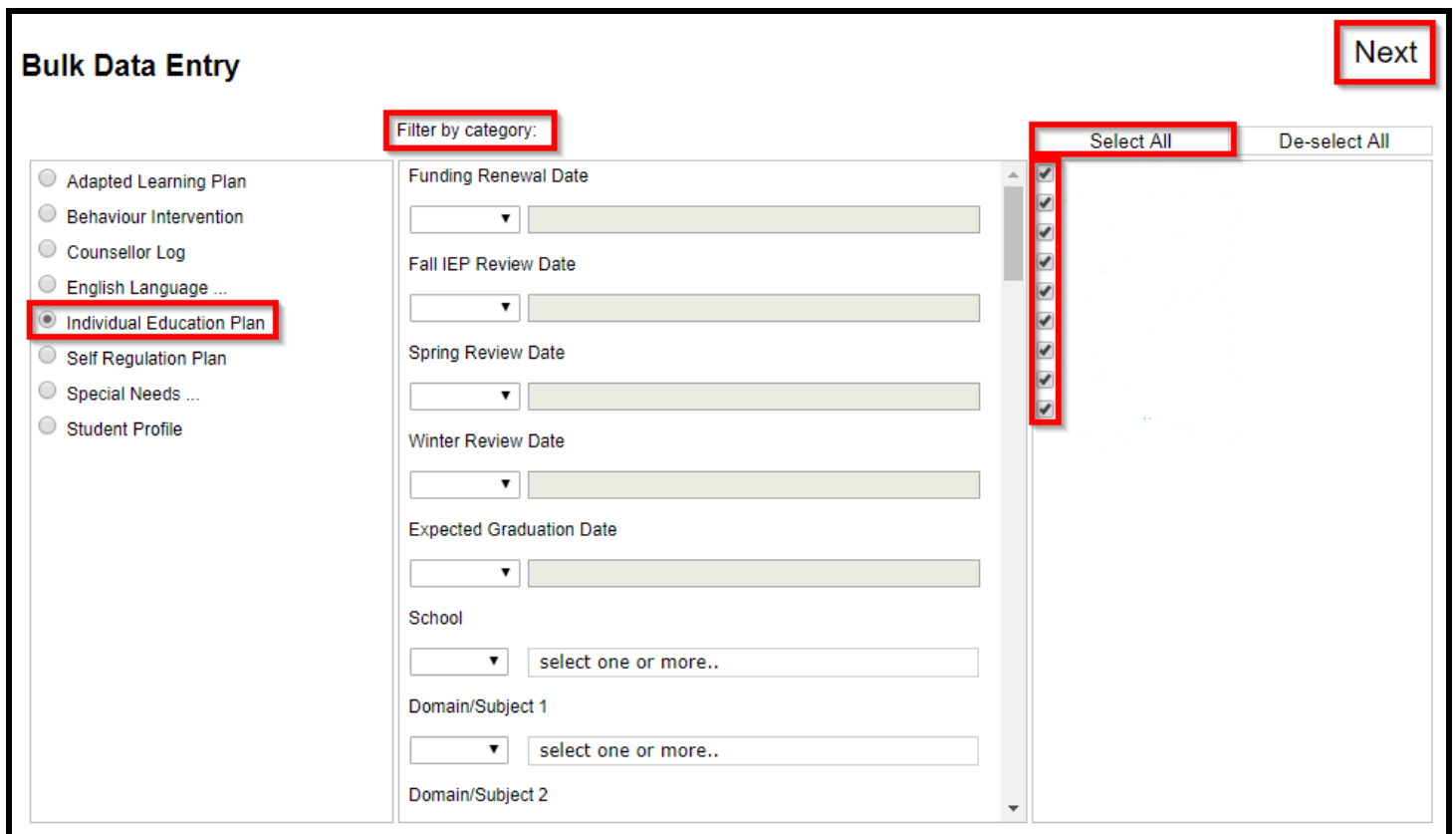
Select either All locations or the first school in the top right dropdown. If you have a large district / division or if there are many records, you will need to perform the **Rollover** on one location at a time.

From the Home screen select the required school or All Locations, then select Bulk > Bulk Data Entry.

In the left hand column, select the form you would like to perform the **Rollover** on.

In the middle column you can apply a filter to narrow down your list of students if you only want to rollover a specific subset of records (Ex: specific grades). Applying a filter is not necessary so this step may be skipped.

Within the right hand column ensure all the required students are selected and click **Next**.



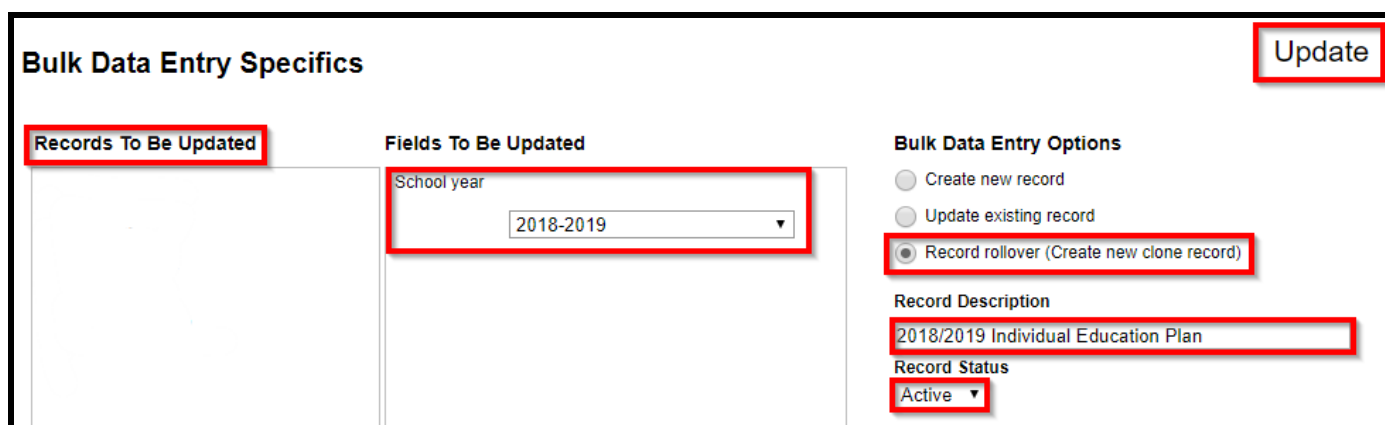
The screenshot shows the 'Bulk Data Entry' interface. On the left, a list of categories includes 'Individual Education Plan', which is selected and highlighted with a red box. The middle section, labeled 'Filter by category:', contains several date and dropdown filters: 'Funding Renewal Date', 'Fall IEP Review Date', 'Spring Review Date', 'Winter Review Date', 'Expected Graduation Date', 'School', 'Domain/Subject 1', and 'Domain/Subject 2'. On the right, a large table of student records is shown, with a 'Select All' button at the top and a column of checkboxes, all highlighted with a red box. A 'Next' button is located in the top right corner, also highlighted with a red box.

Please proceed with caution and follow the next steps precisely! Skipping ahead can cause you to overwrite existing records!

In the **Bulk Data Entry Specifics** screen, the **Records to be Updated** column will display the list of students you selected in the previous input screen. In the middle column, you can select which fields you would like to be updated. You will always want to change school year to the next one. (Ex: if performing the Rollover in June of 2018, you will want to select 2018/2019).

In **Bulk Data Entry Options** you will need to select **Record Rollover**. Enter the name of the new record in the **Record Description** text area. We recommend [School Year] [Name of Form] which would look like this: 2018/2019 Individual Education Plan. In record status, you will want to select **Active**.

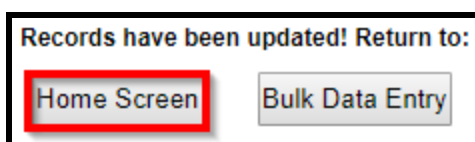
When all these steps are complete, press the **Update** button.



The screenshot shows the 'Bulk Data Entry Specifics' form. It is divided into three main sections: 'Records To Be Updated' (a large empty table), 'Fields To Be Updated' (containing a 'School year' dropdown menu set to '2018-2019'), and 'Bulk Data Entry Options' (containing three radio buttons: 'Create new record', 'Update existing record', and 'Record rollover (Create new clone record)', with the third option selected). Below the options are two text input fields: 'Record Description' (containing '2018/2019 Individual Education Plan') and 'Record Status' (a dropdown menu set to 'Active'). An 'Update' button is located in the top right corner of the form.

It will take a few moments for the **Rollover** to process. Please be patient while this takes place. In extreme cases such as having a slow connection or rolling over a large number of records, it can upwards of 20 mins to process. **While the Rollover is processing, DO NOT close the window, click the back button, or take any action to interrupt this process as it can cause you to ruin your records.**

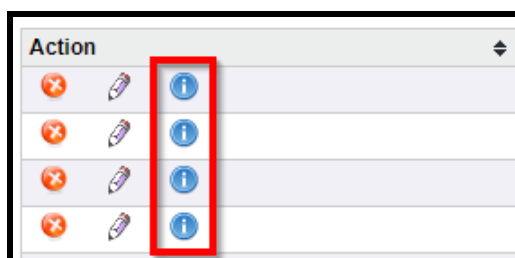
When the **Rollover** has finished processing you will receive a pop up telling you that records have been updated. If the rollover processed for an exceptionally long time, your page will refresh to the login screen. This is OK! When you log back in your records will be rolled over.



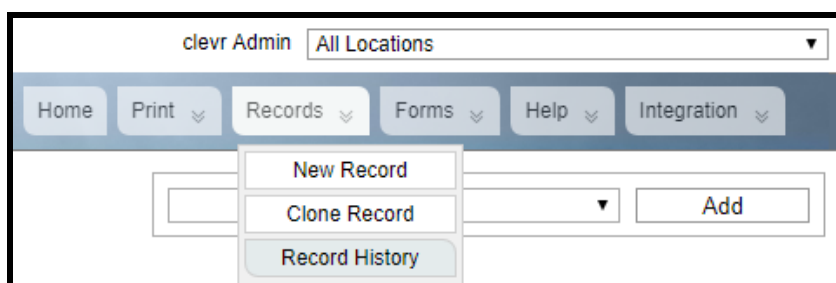
The screenshot shows a confirmation pop-up message that says 'Records have been updated! Return to:'. Below this message are two buttons: 'Home Screen' and 'Bulk Data Entry'.

Verify that the Record Rollover was Successful

When the **Rollover** has finished processing, navigate to the **Homescreen**. If all the students on the **Homescreen** have a blue **Information** icon beside their record, then it is likely that you have **updated the existing record** instead of a **Record Rollover**. Hover over this icon to display the name of the user who last modified the record along with the date that the record was last updated. If you see your name and the date / time the **Rollover** was performed, see the *Help! I think I messed up the Rollover!* heading below.

















If you do not see **Information** icons, you will still want to open the records of a few students to verify. Select a random student from the **Homescreen** and open their record. Navigate to **Records > Record History**.



In the **Record History**, you will want to check for the following items:

1. Description column matches the name you entered in the **Bulk Data Entry** specifics screen
2. Date created matches the time and date you performed the **Rollover**
3. Record Status is active

Record History: Individual Education Plan			
Copy  Save 		First Previous 1 Next Last	
  	Description	Date Created	Status
  	2018/2019 Individual Education Plan	4/2/2018 2:47:28 PM	Active
  	2017/2018 Individual Education Plan	9/15/2017 1:41:44 PM	Locked
  	2016/2017 Individual Education Plan	11/17/2016 4:35:52 PM	Locked

Help! I think I messed up the Rollover!

If at any time you discover an issue with your **Rollover**, it is imperative that you take **no action** to correct this and contact the clevr support team immediately:

Phone: 613-779-8005 or 613-966-6806

Email: support@clevr.ca