

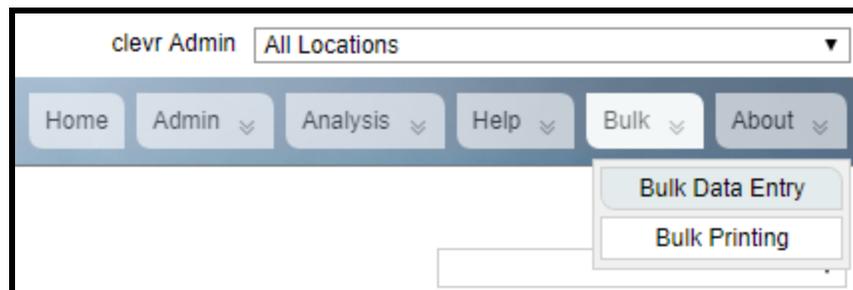
## What is a Record Rollover?

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.

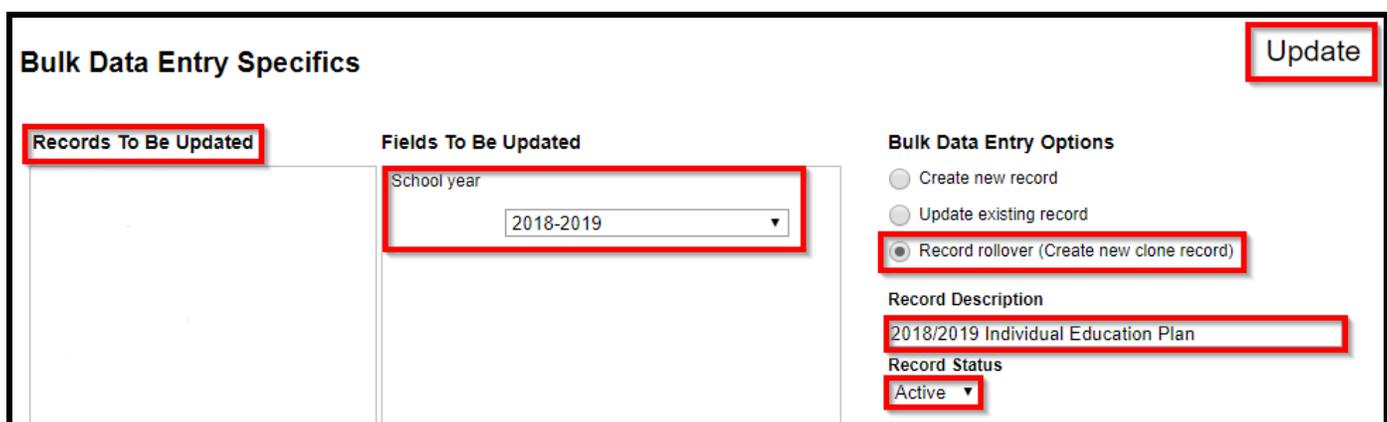


**Please proceed with caution and follow the next steps precisely! Skipping ahead can cause you to overwrite existing records!**

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**.

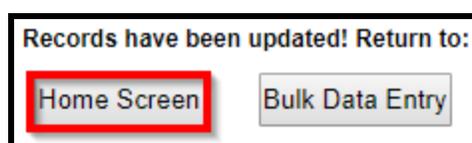
When all these steps are complete, press the **Update** button.



The screenshot shows the 'Bulk Data Entry Specifics' form. It is divided into three main sections: 'Records To Be Updated' (empty), 'Fields To Be Updated' (containing a 'School year' dropdown menu set to '2018-2019'), and 'Bulk Data Entry Options'. In the options section, the 'Record rollover (Create new clone record)' radio button is selected. Below this, the 'Record Description' field contains '2018/2019 Individual Education Plan' and the 'Record Status' dropdown is 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.**

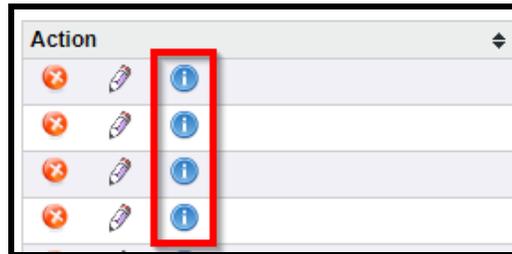
When the **Rollover** has finished processing you will receive a pop up telling you that records have been updated. If the rollover processed for an exceptionally long time, your page will refresh to the login screen. This is OK! When you log back in your records will be rolled over.



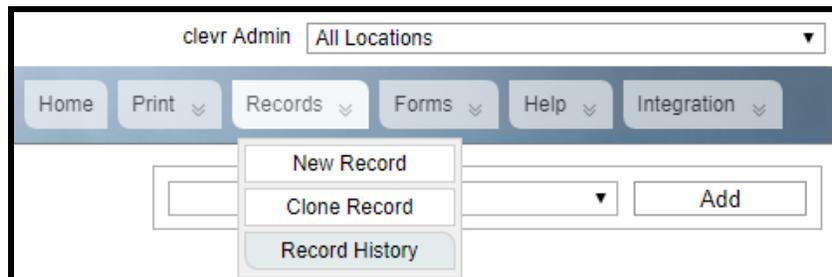
The screenshot shows a confirmation message: 'Records have been updated! Return to:'. Below the message are two buttons: 'Home Screen' and 'Bulk Data Entry'.

## 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			
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](mailto:support@clevr.ca)