**Success Roll Forward Part 1 and Part 2**

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**Overview:**

This process prepares the Success student records for the new academic year. It is split into two parts, "Roll Forward Part 1" in early **April**and "Roll Forward Part 2" in mid **August**. Part 1 creates the Program Year and Academic History Records for the following year. Part 2 updates the years so that what was previously next year is now "this" year. In past year (prior to the 2020-21 academic year) it also deployed the Degree and Affordability Milestones for the year. Make sure that you leave yourself enough time to complete this process. Part 2 in particular has multiple steps and will take several hours. Both Part 1 and Part 2 should be completed after regular business hours or over the weekend to ensure exclusive access to the records. (There will be errors if you and an advisor are trying to edit a record at the same time.) For both Part 1 and Part 2 you **must** have a recent data export because you will be working with thousands of records. 

**Roll Forward Part 1:**

1. This should happen in the spring, preferably by/in the first week of **April** (April 3-5 range)
2. Identify all the students who could continue on to the following year. This will include all Active and Inactive students whose Current Academic Year is **this** year. Exclude students who are already changed to stage Graduated (fall Graduates) and students whose Program College Year is currently Year 6. The students who are currently Year 6 will "Time Out" at the end of this year because they will have had their 6 years in the program. Be sure to exclude students who are currently **applying**for the Success program in the year that you are rolling forward to. For example, if it is currently the 2020-21 year and you are preparing records for the 20*21*-*22* academic year, exclude students whose Program Year is 20*21-22*. The 2021-22 academic year will be their first year with Bottom Line so they should **not**be rolled forward. Students applying to join the Success program should not be made Active (by program staff) this early in the process, but this filter is a failsafe to exclude them.
3. Run a Contacts with Program Records (report type) report with the following filters:
   1. Record Type = Success
   2. Test Application = False
   3. Stage = Active, Inactive
   4. Current Academic Year = *this year* e.g. "2020 - 21"
   5. Program College Year != (not equal to) Year 6
   6. Program Year != (not equal to) *next year* e.g. "2021-22"
   7. Must be included in the columns/export:
   8. ProgramRecordID18
   9. Create Next Year Academic History Record
   10. Perform Next Year Roll Forward
4. Use this report as a template or simply update for the following year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y0000070pqhUAA/view>
5. Look at the fields for Create Next Year Academic History Record and Perform Next Year Roll Forward. If they are still checked (True), you will first need to run a mass update to remove the checks.
6. Export the report into Excel (CSV) and change the values in Create Next Year Academic History Record and Perform Next Year Roll Forward from 1 to 0.
7. **CONFIRM THAT YOU HAVE A RECENT DATA EXPORT BEFORE PROCEEDING.**
8. Login to Dataloader.io and run a Program Record update mapping ProgramRecordID18 to Record ID and the Create Next Year Academic History Record and Perform Next Year Roll Forward fields from the excel spreadsheet to the Salesforce fields. This should be automatic for the latter 2 fields because the names came directly from Salesforce.
9. In the Advanced options just before running the upload, check the box for "Insert Null Values." Replacing a check with "uncheck" is replacing a 1 with a 0.
10. **You must also run this update in very small batch sizes (roughly 5 at a time) and preferably after business hours when advisors are not logged in. The update will fail if the advisor is updating the Program Record at the same time you are running the update.**
11. When the update finishes confirm that Create Next Year Academic History Record and Perform Next Year Roll Forward fields are "unchecked" in Salesforce.
12. You are now done with the "Perform Next Year Roll Forward" field for the moment. Unchecking this box now saves you a step in a few months during Roll Forward Part 2.
13. Export a fresh spreadsheet from your report above or use the "Successful update" file from Dataloader.io.
14. Remove Perform Next Year Roll Forward from your spreadsheet OR add a "Don't Update" to the column name so that you don't accidentally update this field.
15. For the column containing Create Next Year Academic History Record enter a 1 in each cell. You can enter a 1 in the first cell and then flash fill the remaining cells, but make sure that all the values are 1 not a sequence (1,2,3, etc) since this will cause errors.
16. Return to Dataloader.io and run another Program Record to check off Create Next Year Academic History Record. Run a test with 5 records to confirm that the Academic History Records and Program Year for the following year were created correctly. The actual update with the remaining Success records should again be in a small batch (roughly 5 at a time).
17. ​​​​​​​This will take some time as dataloader.io runs through the small batches. Make some tea and then check on the progress.
18. You can check on the overall progress using the report from the beginning to see how many have Create Next Year Academic History Record checked off and/or run an Academic History Records report to confirm that the records are being created.
19. Drink your tea and give yourself a pat on the back. Roll Forward Part 1 is done!

**Additional Step for Roll Forward Part 1: Populate the Next Fall Lookup Field**

1. After you have completed the Roll Forward Part 1, you will need to populate the Next Fall Lookup field with the Fall Academic History Record that you just created. (You do not need to complete this step for the Spring Academic History Record or the Program Year, just the Fall Academic History Record).
2. Run an Academic History Records report type with the following filters:
   1. Show: All academic history records
   2. Created Date: All Time
   3. Program Record: Record Type = Success
   4. Academic Year (from the Academic History) = "next year" e.g. 2021 - 22
   5. Session or Term = Fall Term
   6. Program Record: Test Application = False
   7. Program Record: Program Site = "all sites" e.g. Jamaica Plain, Worcester, Dorchester, New York City, Chicago
   8. Program Record Current Academic Year = "this year" e.g. 2020 - 21
   9. Program Record: Stage = Active, Inactive
3. Use this report as a template or update for each year: <https://bottom-line.lightning.force.com/lightning/r/Report/00O1Y000006q5o3UAA/view?queryScope=userFolders>
4. **CONFIRM THAT YOU HAVE A RECENT BACKUP**
5. Export the results as a CSV file.
6. The report above should be filtering to show one row per newly created Fall Academic History Record. You are taking the ID of this Fall Academic History Record (AcademicHistoryID18) and populating the Program Record: Next Fall Lookup field on the related Success Program Record
7. In your spreadsheet, make sure that you have ProgramRecordID18 (the ID of the Program Record you will be updating) and AcademicHistory18
8. Copy the column containing AcademicHistoryID18 into a new column and rename it "Next Fall Lookup"
9. Use dataloader.io to run a Program Record update mapping ProgramRecordID18 to Id and Next Fall Lookup to Next Fall Lookup.

**August, begin Part 2:**

**Update the BL Formula Setting for Current Academic Year**

1. From Setup, navigate to the Custom Settings.
2. Click on BL Formula Settings, then click "Manage"
3. Edit the custom setting so that the year is "this year" (e.g 2020 - 21)
4. This is a text field so it is safest to copy and paste this from an academic year picklist (like the Current Academic Year field on the Program Record)
5. Save your changes.

**Update the Custom Metadata Config**

1. From Setup, navigate to Custom Metadata Types
2. Click Manage next to BL App Config
3. For BL Current Acad Year, edit the Value (Text Area) so that the value is "this year" (e.g. 2021 - 22)
4. This is a text field so it is safest to copy and paste this from an academic year picklist (like the Current Academic Year field on the Program Record)
5. Save your changes.

**Roll Forward Part 2:**

* This portion occurs in the summer, usually around the second week of **August** (August 15).
* Roll Forward Part 2 is more complicated than Part 1 and requires coordination with more stakeholders. When you complete Part 2, you are essentially saying (in Salesforce) that the last academic year is over and the new academic year is ready to start. This has implications for the data that advisors are entering and on all reports that depend on "this year" focus. The data is still accessible, but not as easily.
* Before you begin, coordinate with the Program Leadership Team (Sarah/Michelle) to confirm that all of the data from the previous year is entered.
* Also, coordinate with the owner of the data warehouse (Jenn/Karla) and confirm that the data warehouse population has already been completed. Data on the Student Progression that references Last or Most Recent must be entered before you run Roll Forward Part 2. **JENN PLEASE REVIEW THIS PART.**
* **Make sure that you have a recent data export.**

**Time Out Year 6 Students**

* The process for Roll Forward Part 2 is much easier if you first **"Time Out" the Year 6 students**.
* This means identifying the students who were served in the current academic year (the one that just ended, since it is now August) where Program College Year is Year 6. When you have identified these students, both *Active* and *Inactive* you will change their Stage to Timed Out.
* Run a Contacts with Program Records (report type) report with the following filters:
  + Record Type = Success
  + Test Application = False
  + Program College Year = Year 6
  + Stage = Active, Inactive
* Must be included in the columns/export:
  + ProgramRecordID18
  + Stage
* Use this report as a template or reuse year over year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S5iuUAC/view>
* It is very important that you **only**Time Out students after the academic year has ended and before the Roll Forward Part 2. Otherwise, you will run the risk of timing out the wrong students.
* **AGAIN, CONFIRM THAT YOU HAVE A RECENT BACKUP.**
* Export the report (as a CSV) and use Dataloader.io to change the Stage from Active or Inactive to Timed Out.
* On the spreadsheet, under the Stage column replace Active and Inactive with Timed Out. For extra safety, copy and paste the exact wording and spacing from the Stage picklist on the Program Record.
* Remove any other fields besides ProgramRecordID18 and Stage or add a "Don't Update" note to the columns. This ensures that you don't accidentally update any of the other Program Record fields.
* In Dataloader.io, you will run a Program Record mass update. Map ProgramRecordID18 to Record ID and Stage to Stage. Stage should map automatically because this came directly from Salesforce.
* Set a small batch size (roughly 5) and let this run. Confirm in your report and/or by spot-checking that the students are successfully changed to Timed Out. If you do not edit the filters on your report, records will disappear when you refresh the report up until the update is complete. (Then there will be 0 records.)

**Note on Program Milestones (Information Only--Skip this if we continue to no longer use the Program Milestones object)**

* In past years, (prior to the 2020-21 academic year) we used a separate object called the Program Milestone to track if students were achieving the milestones needed for Degree, Affordability, and Employability, such as register for fall classes, earn 10% of overall credits etc.
* These Program Milestones for **Degree**and **Affordability**needed to be repeated each academic year (students will need to pay their bill, register for classes, earn credits etc. for all the years they are in college) and so we would deploy new Degree and Affordability Program Milestones as part of the Roll Forward Part 2.
* As of the 2020-21 academic year, we are no longer using these milestones. If we should ever need to use these again, the template Program Milestones still exist. Under the Program Milestones tab, there is a list view called "Template Milestones." These are tied to the appropriate Program Year Template for Year 1, Year 2, Year 3, etc.
* The Program Milestone templates are currently inactive. To activate them again, the "Active" checkbox on the Program Milestone templates must be checked (boolean TRUE). You will need to check off each individual Program Milestone template that should be reactivated. For example, if we decided that we still needed to track "Maintain Satisfactory Academic Progress" in the Program Milestone for all Success students (Year 1-Year 6) then you will need to find the individual template record tied to Year 1, Year 2, etc. and check off the "Active" checkbox for each one.
* The **Employability** and **Life**Program Milestone Templates use the same "Active" checkbox but are triggered by a different process. Each set of milestones were deployed for Year 1 only by the Provision Employability Milestones checkbox and the Provision Life Milestones checkbox respectively. These checkbox fields triggered Apex Triggers that created the milestones and tied them to the Year 1 Program Record of the Year 1 cohort. The trigger on/off switches can be found under Custom Settings > BL Application CONFIG. They are "Provision\_Emp\_Milestones triggerSwitch" and "Provision\_Life\_MS triggerSwitch." The "Emp\_Milestone\_Complete triggerSwitch" is the switch for a separate apex trigger that tied the Employability Milestones to "this current" Program Year when the Employability Milestone was marked as completed, i.e. reparenting from the Year 1 Program Year to the current year.
* The template milestones are inactive and the Provision Life and Provision Employability Milestone triggers are all turned off as of the 2020-21 academic year. You should not need to do anything with these unless we reuse the Program Milestones object.

**Run Roll Forward Part 2 Mass Update**

* **Make sure you have a recent backup**.
* You will need to identify the students from the "last" academic year that we believe are continuing on to next year, just as in Part 1. We are again identifying the students who in the last academic year were Program College Year of Year 1 through Year 5, the students who will now be "rolled forward" one year to become the students in Year 2 through Year 6, e.g. Year 2 students will now be Year 3 students etc.
* My preferred method for identifying these students is to use the data that we created in Roll Forward Part 1. We know that we only created Academic History Records and Program Year records for "next year" for continuing Active and Inactive students. So, not for students who Graduated or Timed Out.
* Knowing this, we can look specifically at the Fall Academic History record for "next year." A student who is continuing on to next year will have a Fall Academic History Record that you created in Part 1. We can then use the relationship to the Program Record to pull in the specific fields that we need, while relying on the Academic History Record for the Fall as a "silent filter."
* To use this logic to identify the students, run a report using the Academic History Records report type with the following filters:
  + Program Record: Record Type = Success
  + Academic Year (on the *Academic History Record itself) =*"next year" e.g. 2020 - 21
  + Session or Term = Fall Term
  + Program Record: Test Application = False
  + Program Record: Stage = Active, Inactive
  + Program Record: Program Site = "all sites" (Jamaica Plain, Worcester, Dorchester, New York City, Chicago)
  + Program Record: Program Year != (not equal to) "next year" e.g. 2020 - 21
* The report must include these fields in the columns/export:
  + Program Record: ProgramRecordID18
  + Program Record: Perform Next Year Roll Forward
  + Program Record: Current Academic Term
* Use this report as a template or simply update the year filters: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000006pKe9UAE/view>
* **A note about Academic Year and Program Year Filters**: It is important here to identify the students who were served "last year" e.g. 2019 - 20 who are continuing on to next year and **exclude** the students whose first year in the Success program will be "next year" e.g. 2020 - 21. We do not want to roll forward the students whose first year will be next year because they have not yet completed their first year with Bottom Line. This is the reason for the Program Year not equal to next year. We are explicitly excluding the new cohort who will be Year 1 students *next year*.
* After confirming that you have a recent backup, you will run a mass update in Dataloader.io
* Export the details from the report above (CSV) and make sure that you have ProgramRecordID18 and Perform Next Year Roll Forward, and Current Academic Term.
* If you have any other fields in the spreadsheet e.g. Program Record Name, Program College Year etc., be sure to change the column name by adding "DON'T UPDATE" to the name. This ensures that Dataloader.io does not automatically map back to fields in Salesforce and prevents accidentally updating fields that should not be updated.
* The values in Perform Next Year Roll Forward should currently be 0 (FALSE). One of the steps in Roll Forward Part 1 above is to remove the 1 (TRUE) values in preparation for Part 2.
* In the Perform Next Year Roll Forward column, enter 1 (TRUE) in each cell. Remember that you can use flash fill, but confirm that it is copying the value, rather than entering a sequence.
* The value in Current Academic Term will be "Spring." In your spreadsheet enter "Fall" in each cell. You can use flash fill to add this to each cell in the column.
* Open dataloader.io and set up the Program Record mass update. Map ProgramRecordID18 to the Record ID on Program Record, Current Academic Term to Current Academic Term and Perform Next Year Roll Forward to Perform Next Year Roll Forward. DO NOT MAP/UPDATE  ANY OTHER FIELDS.
* Set a very small batch size (around 5 records) and run the mass update. It is also a good idea to test with 5 or so records and confirm that the appropriate fields have been updated. On a specific Program Record, Program College Year should advance by one year (e.g. Year 2 to Year 3), Current Academic Term will say Fall, and Current Academic Year will say "next year" e.g. 2020 - 21.
* This update will take some time. Make some tea and come back. You can modify the report above to summarize by Current Academic Year to monitor the progress of the mass update as it works through the records. Please do not save this change. Alternatively, you can Save As to create a separate monitoring report.

**Current Fall Lookup, Current Spring Lookup, Current Program Year**

* The current semester and year lookup fields are critical to "this year" reporting. They are lookup fields on the Program Record that link to the Academic History Records for the fall and the spring semesters of the current year and the current Program Year.
* To prepare for the following current academic year, you must replace "last year's" lookups with "this year's" lookups. Before proceeding confirm with the owner of the data warehouse and PowerBI (Jenn/Karla) that they have run a final export to capture "last year's" data. This is needed to populate goals and Outcomes data. While it is still accessible, it is much more difficult to isolate and connect to PowerBI after you replace the lookups.**NO LONGER NEEDED AS OF AUGUST 2021. WE ARE USING A DIFFERENT METHOD TO PRESENT THIS DATA.**
* ​​​​​​​**As always, confirm that you have a recent backup.**
* Once you have confirmed that we have the final export/capture of last year's data, you will need to remove the current lookups in Current Fall Lookup, Current Spring Lookup, and Current Program Year and Next Fall Lookup and replace these with the new academic year's records.
* The cleanest way to do this is to first remove the data in the lookup fields in one mass update and then add the new year's data in separate uploads.
* First, you will need to identify the students from the previous academic year who are continuing to next year.
* You will use a report that is similar to what you will used for Roll Forward Part 2 above. For this portion, you will need to identify students from last year who are continuing into next year, excluding students who will be Year 1 students in the following academic year and students who are timing out. Since you have already completed the Roll Forward Part 2 update above, these students are now in Program College Year 2-6. The simplest way to do this is to run a report based on the Academic History Records that you created in Roll Forward Part 1. **August 2021 Note: We are already setting the Current Fall and Current Spring for Year 1 students separately. (this must be part of the Provision Year 1 Trigger). Exclude Year 1 students from both steps below: clearing out the old lookups and inserting the new lookups. In August 2021 this means excluding students whose Program Year = 2021 - 22.**
* Run a report based on the Academic History Records report type with the following filters:
  + Academic Year (*on the Academic History Record*) = "this new year" e.g. 2020 - 21
  + Session or Term = Fall Term
  + Program Record: Test Application = False
  + Program Record: Current Academic Year = "this new year" e.g. 2020 - 21
  + Program Record: Current Fall Lookup: Academic History Name != (not equal to) BLANK
  + **Program Record: Program Year != (not equal to) "this new year" e.g. 2020 - 21**
* The report will need the following fields in the columns/export:
  + Program Record: ProgramRecordID18
  + Program Record: Current Fall Lookup: Academic History Name
  + Program Record: Current Spring Lookup: Academic History Name
  + Program Record: Current Program Year: Program Year Name
  + Program Record: Next Fall Lookup: Academic History Name --**ADDED AUGUST 2021. NEED TO CLEAR THIS OUT TO AVOID CONFUSION**
* Use this report as a template, but be sure to double check the filters. You will use it both to remove last year's lookups and to add the new year's:
  + <https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S5ljUAC/view>
* Export the details from the report above (CSV). Confirm that ProgramRecordID18, Current Fall Lookup, Current Spring Lookup, and Current Program Year AND NEXT FALL LOOKUP are on your report.
* **Confirm that you have a recent backup and that you have checked with Jenn and Karla that they have exported last year's data for PowerBI and the data warehouse.**
* In your spreadsheet, leave the columns headers in place for Current Fall Lookup, Current Spring Lookup, and Current Program Year, AND NEXT FALL LOOKUP, but delete the values in all the cells. By leaving the headers but deleting the data you will be inserting a null value into the field and "clearing out" the current lookups.
* Open Dataloader.io to run a mass update on the Program Record object. Map ProgramRecordID18 to Record ID, Current Fall Lookup to Current Fall Lookup, Current Spring Lookup to Current Spring Lookup, and Current Program Year to Current Program Year AND NEXT FALL LOOKUP TO NEXT FALL LOOKUP.
* In the Advanced options just before running the upload, check the box for "Insert Null Values." Removing the values in the current lookups means replacing a value with a null.
* As usual, it is safest to run small batch sizes (roughly 5). Use your report to confirm that records are "disappearing" from your report as the Lookups are removed. If you are using the filter above for Current Fall Lookup is not blank, then the records will no longer show on the report as the data is cleared out.
* Once the current lookups have been removed, you will need to replace them with the new year's lookups. YOU WILL NOT NEED TO ADD A NEW VALUE FOR NEXT FALL LOOKUP. YOU WILL COMPLETE THIS AS PART OF ROLL FORWARD PART 1 NEXT YEAR. SEE ABOVE.
* Return to your report above (template: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S5ljUAC/view>) and remove the filter for Current Fall Lookup is not blank.
* You will now see more records that you started with when you removed the lookups from last year. **This is to be expected**. Only students who were served last year would have data in the current lookup fields from last year. All of the new Year 1 students (the cohort that has not yet started their time with Bottom Line) will also show on your report now because their current academic year etc. are also set for the new year. **August 2021 this is no longer the case. There should be the same number of students as you saw in the previous step because Year 1 students will already have Current Fall and Current Spring and Current Program Year set.**
* Your report should still be focusing on the upcoming Fall Academic History Record.
  + Academic Year (*on the Academic History Record*) = "this new year" e.g. 2020 - 21
  + Session or Term = Fall Term
  + Program Record: Record Type = Success
  + Program Record: Test Application = False
  + Program Record: Program Site = "all sites" (Jamaica Plain, Worcester, Dorchester, New York City, Chicago)
  + Program Record: Current Academic Year = "this new year" e.g. 2020 - 21
  + **Program Record: Program Year != (not equal to) "this new year" e.g. 2020 - 21**
* Make sure that your report also has the following fields in the columns/export:
  + Academic History Name
  + AcademicHistoryID18
  + ProgramRecordID18
  + Program Record: Current Fall Lookup: Academic History Name
  + Program Record: Current Spring Lookup: Academic History Name
  + Program Record: Current Program Year: Program Year Name
  + Program Year: ProgramYearID18
* You will need to run 2 or 3 mass updates to enter the new lookups for this new year. You can update 2 fields at once of you do both the Fall and the Current Program Year in one update.
* Export the details from the report as a CSV.
* Since you are first focusing on the Academic History Record for the fall, the Academic History Name should have "Fall" in the name e.g. "Karla Rivera Year 1 2020 - 21 Fall." You can also include the Session or Term field in your export and all values should say "Fall Term."
* If you are running the Current Fall and Program Year mass update with this spreadsheet, **Remove** the column labeled Program Record: Current **Spring** Lookup: Academic History Name. You will update this field in the next batch, but removing it now ensures that you don't accidentally update it with the wrong data.
* Confirm that you are looking at Fall record. Locate the columns for AcademicHistoryID18 and for Program Record: Current Fall Lookup: Academic History Name. In the AcademicHistoryID18 column header, copy and paste "Current Fall Lookup:" before AcademicHistoryID18 so that the column now says "Current Fall Lookup: AcademicHistoryID18."
* You will do the same thing for the Current Program Year field. Locate the columns for Program Year: ProgramYearID18 and Program Record: Current Program Year: Program Year Name. In the column header for Program Year: ProgramYearID18, remove "Program Year:" and copy paste "Current Program Year" before ProgramYearID18. The column should now say "Current Program Year: ProgramYearID18."
* Add a "Don't Update" to the column headers for any other columns in your spreadsheet besides ProgramRecordID18, Current Fall Lookup: AcademicHistoryID18, and Current Program Year: ProgramYearID18.
* Open Dataloader.io and run a mass update on the Program Record object. You will need to manually map ProgramRecordID18 to the Program Record Record ID, Current Fall Lookup: AcademicHistoryID18 to Current Fall Lookup using Lookup via: AcademicHistoryID18, and Current Program Year: ProgramYearID18 to Current Program Year using Lookup via: ProgramYearID18.
* Run the update with small batches (roughly 5) and use your report to monitor the progress. You can summarize by Current Fall Lookup or Current Program Year. The "blank" values should continue to decrease as the data is uploaded. Test with a few records or spotcheck as you go to confirm that the records are linking correctly. This will take some time so after you confirm that it is working, make another pot of tea.
* You're almost done. When this update is complete, you will need to repeat the steps for the Current Spring Lookup.
* Use the report, but you will need to change the filters so that it is pulling the *Spring* records instead of the Fall.
  + Academic Year (*on the Academic History Record*) = "this new year" e.g. 2020 - 21
  + Session or Term = *Spring* Term
  + Program Record: Record Type = Success
  + Program Record: Test Application = False
  + Program Record: Program Site = "all sites" (Jamaica Plain, Worcester, Dorchester, New York City, Chicago)
  + Program Record: Current Academic Year = "this new year" e.g. 2020 - 21
  + **Program Record: Program Year != (not equal to) "this new year" e.g. 2020 - 21**
* Make sure that your report also has the following fields in the columns/export:
  + Academic History Name
  + AcademicHistoryID18
  + ProgramRecordID18
  + Program Record: Current Spring Lookup: Academic History Name
* You will not need the Current Fall Lookup or the Current Program Year so remove them from the report for now.
* Export the details from the report as a CSV.
* Since you are now focusing on the Academic History Record for the spring, the Academic History Name should have "Spring" in the name e.g. "Carlos Rivera Year 1 2020 - 21 Spring." You can also include the Session or Term field in your export and all values should say "Spring Term."
* Confirm that you are looking at **Spring** record. Locate the columns for AcademicHistoryID18 and for Program Record: Current Spring Lookup: Academic History Name. In the AcademicHistoryID18 column header, copy and paste "Current Spring Lookup:" before AcademicHistoryID18 so that the column now says "Current Spring Lookup: AcademicHistoryID18."
* Open Dataloader.io and run a mass update on the Program Record object. You will need to manually map ProgramRecordID18 to the Program Record Record ID and Current Spring Lookup: AcademicHistoryID18 to Current Spring Lookup using Lookup via: AcademicHistoryID18.
* Run the update with small batches (roughly 5) and use your report to monitor the progress. You can summarize by Current Spring Lookup. The "blank" values should continue to decrease as the data is uploaded. Test with a few records or spotcheck as you go to confirm that the records are linking correctly. This will take some time so after you confirm that it is working, make another pot of tea.
* When this is done, you will just have one more step to complete.

**Deploy Tasks for the Academic Year**

* As of the 2020 - 21 academic year we are using the standard Tasks object to replace the Program Meeting and Program Tasks objects that we have used to track engagement and services for Success.
* The Deploy Tasks field on the Program Record triggers a process builder that will create a series of tasks for the advisor to complete with each Success student.
* In order for this process builder to work, the Program Record must have a record linked in the Advisor field. Meaning that the student must be assigned to an advisor. When the tasks are created, they will need to be assigned to both a specific Program Record (student) and to a specific user (Advisor).
* Coordinate with the regional program leaders (Success Program Directors) to confirm that all the students are assigned. You will need to support by running a mass update to assign the students to advisors.
* The Success Program Directors will send you a spreadsheet including ProgramRecordID18 and the new advisor the student should be assigned to. If the advisor name does not exactly match the user Full Name, you will get errors in Dataloader.io.
* Determine what should be done with any students who are unassigned (e.g. assign them to the Program Director) or exclude them from the Tasks update.
* Once this is complete, you are ready to run the deploy tasks update.
* Use a report based on the Contacts with Program Records report type with the following filters:
  + Record Type = Success
  + Test Application = False
  + Current Academic Year = the new academic year (e.g. 2020 - 21)
  + Stage = Active (we only want to create tasks for Active students)
  + Program Site = the site you are working on e.g. Chicago. (in 2020 - 21 we ran this for Chicago first. In the future we might run all sites at once)
* Confirm that the following fields are in your columns/export:
  + ProgramRecordID18
  + Deploy Tasks
* Use this report as a template or update for each year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S5xBUAS/view>
* Export the details as a CSV
* For the Deploy Tasks column, the values should be 0. In years after 2020 - 21, you might need to first run an update to remove the 1 value and replace with a 0. Checking the box, i.e. replacing a 0 with a 1 is what triggers the tasks to deploy.
* For each cell in the Deploy tasks column, replace the 0 with a 1. You can use flash fill, but make sure that each cell has a 1 and that excel uses "copy" instead of entering numbers in a sequence.
* Confirm that any columns other than ProgramRecordID18 and Deploy Tasks have "Don't Update" in the column so that you don't accidentally update the wrong fields.
* Open Dataloader.io and run a Program Record mass update, mapping ProgramRecordID18 to Program Record Record ID and Deploy Tasks to Deploy Tasks.
* You will need to use very very small batch sizes. When I ran this in 2020 - 21 for Chicago, batch sizes of 5 still had still had 170 errors out of 1084 records. I re-ran the 170 with a batch size of 2 and they went through without errors.
* Confirm that the correct Tasks are deploying and are tied to both the Program Record and to the current advisor.
* This update especially will take a long time so after confirming that it is running and updating correctly, make some tea and then come back to check on it. You can use the report above to summarize by the Deploy Tasks field to monitor how many records are remaining.
* When this is complete, you are done with the main portion of the Roll Forward process. In the coming weeks and months you will need to run discrepancy reports for Year 1 Success students who have been made Active after you entered the current lookups and deployed tasks.
* Use reports like this one (<https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S5wIUAS/view>) to find students who have the Current Academic Year set to "this new year" but do not have Current Fall Lookup, Current Spring Lookup, or Current Program Year. These students will also need to have tasks deployed but only **after** they have been assigned to an advisor. Add the lookup fields manually or run "mini" versions of the lookup updates outlined above.

**Post Roll Forward Cleanup**

Because of the timing for the roll forward, there are always students who are "mistakenly" included or excluded from the roll forward. Either there are students who have graduated, but we were not aware at the time of the roll forward or there are students who we **thought** had graduated (and were marked as Graduated) but have not actually graduated.

Before you begin, confirm that the final step in [NSC Data Pulls](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/SitePages/NSC-Data-Pulls.aspx) process has already been completed. This is the step where the Program Records for recent graduates are marked as Graduated. (Create a discrepancy report where using Student Progressions with Success Program Record Lookup where Student Progressions "Graduation Year (Numeric)" is not blank and Program Record Stage is not Graduated or Timed Out. Then use this report to update the Stage to Graduated.)

After the recent graduates are updated, use another discrepancy report to identify students who were included in the roll forward but actually graduated before the "current" academic year. For example, as of September 2020 the current academic year is 2020 - 21. Students who graduated before September should not be included in 2020 - 21 and will need to be "rolled back" to 2019 - 20.

**"Roll Back" 2019 - 20 Graduates**

After the NSC Pull and Grads updated outlined above, run a discrepancy report for students who have Graduated but have a current academic year of the current year.

* Create a report based on the Contacts with Program Records report type.
* Filter for
  + Record Type = Success
  + Test Application = False
  + Stage = Graduated/Confirmed/Nonmatriculated/Not eligible (Added Confirmed/Nonmatriculated/Not eligible - Oct 2022)
  + Current Academic Year = "this year" (e.g. 2020 - 21)

Use this report as a reference point or update it for following years: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HRBAUA4/view>

You will use this report as a reference point as you are deleting extraneous records and will need it for the final step in the "roll back" clean up.

Students who graduated "last year" e.g. 2019 - 20 should not have supporting records (Academic History Records, Program Year) for "this year" e.g. 2020 - 21. You will also need to "roll back" their Program College Year, Current Academic Semester, and Current Academic Year. For example a student who is marked as "Year 6" in Program College Year, but actually graduated last year should have "Year 5" instead. **You should only run this process in the fall of the current academic year (September/October) to ensure that you do not "roll back" the wrong students.**

* Create a report using the Academic History Records report type with the following filters:
  + Program Record: Record Type = Success
  + Academic Year (on the Academic History Record) = "this year" e.g. 2020 - 21
  + Session or Term = Fall Term
  + Program Record: Test Application = False
  + Program Record: Program Site = "all sites" i.e. Jamaica Plain, Dorchester, Worcester, New York City, Chicago
  + Program Record: Current Academic Year = "this year" e.g. 2020 - 21
  + Program Record: Stage = Graduated/Confirmed/Nonmatriculated/Not eligible (Added Confirmed/Nonmatriculated/Not eligible - Oct 2022)

Make sure that your report includes the following fields:

* AcademicHistoryID18
* Session or Term
* Academic Year (from the Academic History Record)

Use this report as a template or update this one each year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HRD6UAO/view>

* **Make sure that you have a recent backup before proceeding.**
* Export the results of the report above. Confirm that you have the AcademicHistoryID18 field in your spreadsheet. Be sure to "break" the auto mapping in dataloader.io by adding "Don't Update" to any other fields in your spreadsheet.
* Navigate to Dataloader.io. Run a "Delete" job on the Academic History Record object. Be very careful to ensure that you have selected the correct object.
* Run the Delete job and confirm that the records have been deleted.
* Your report should now show 0 results and your reference report using Contacts with Program Records above should have blanks in the "Current Fall Lookup" field.
* Edit the filters on your Academic History Records report and change the Session or Term filter from "Fall" to "Spring."
* Repeat the steps above to Delete the Spring Academic History Records using dataloader.io.

Create a new report using the BL Program Year Only report type with the following filters:

* Program Record: Record Type = Success
* Program Record: Test Application = False
* Program Record: Program Site = "all sites" i.e. Jamaica Plain, Worcester, Dorchester, New York City, Chicago
* Program Record: Current Academic Year = "this year" e.g. 2020 - 21
* Program Record: Stage = Graduated/Confirmed/Nonmatriculated/Not eligible (Added Confirmed/Nonmatriculated/Not eligible - Oct 2022)
* Academic Year (from the Program Year) = "this year" e.g. 2020 - 21

Make sure that your report includes the following fields:

* ProgramYearID18
* Academic Year (from the Program Year object)

Use this report as a template or update it for each year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HS74UAG/view>

* Export the results of the report above. Confirm that you have the ProgramYearID18 field in your spreadsheet. Be sure to "break" the auto mapping in dataloader.io by adding "Don't Update" to any other fields in your spreadsheet.
* Navigate to Dataloader.io. Run a "Delete" job on the Program Year object. Be very careful to ensure that you have selected the correct object.
* Run the Delete job and confirm that the records have been deleted.
* Your report should now show 0 results and your reference report using Contacts with Program Records above should have blanks in the "Current Program Year" field.
* Finally, use the "reference" report from above with focus on Program Record object to "roll back" Current Academic Term, Current Academic Year and Program College Year to last year/one year back.
* For example if the academic year is now 2020 - 21, the new value in Current Academic Year should be 2019 - 20. If the current value in Program College Year is Year 5, the new value should be Year 4. Change the Current Academic Term from Fall to Spring.
* You will need to make these changes in Excel. Pay particular attention to the Program College Year changes as these will be different for different records.
* The values in Current Fall Lookup, Current Spring Lookup, and Current Program Year should already be blank, but confirm that you did not miss any in the previous steps.
* Navigate to Dataloader.io and run a mass update on the Program Record object. Be sure to set a small batch size (5).
* Your reference report above should now show 0 records.
* Set up a subscription to this report so that you are notified if the number of records is 1 or more in case any records are marked as Graduated after you complete this process.

**Identify and Fix Students Mistakenly Excluded from the Roll Forward**

There will be cases where a student record was excluded from the roll forward because their Stage was not Active or Inactive at the time of Roll Forward Part 1 and/or Part 2. This is usually because they were marked as Graduated **incorrectly.**When this is corrected (i.e. the record is changed back to Active or Inactive) the record with have the right stage but the wrong Program College Year and Current Academic Year and will not have the supporting Academic History Records and Program Year for the new year.

To identify these records, run a discrepancy report.

* Create a report using the Contacts with Program Records report type with the following filters:
  + Record Type = Success
  + Test Application = False
  + Stage = Active, Inactive
  + Current Academic Year != (not equal to) "this year" (e.g. 2020 - 21)
* Make sure that your report includes the following fields:
  + ProgramRecordID18
  + Current Academic Year
  + Date of Last Stage Change (helpful for history/troubleshooting)
* Use this report as a template or update each for year: <https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HRAlUAO/view>
* To fix these records you will need to complete the roll forward in miniature. If there are 10 records or fewer it is probably easier to do these manually.
* Uncheck Create Next Year Academic History Record and Perform Next Year Roll Forward and Save.
* Then check these fields again and Save.
* Clear out the old data currently in Current Program Year, Current Fall Lookup, and Current Spring Lookup.
* Update these fields with the newly created Program Year, Fall Semester, and Spring Semester for this year (e.g. 2020 - 21).
* Check off "Deploy Tasks" to create the tasks for this year. ONLY for Active students, not for Inactive students.
* Double check that Current Academic Year and Current Academic Semester are this semester and this year (e.g. Fall 2020 - 21) and that the Program College Year has moved forward by one year.