**Success Roll Forward to Spring**

**Overview:**

This is a miniature version of the roll forward from one year to another for Success. Rather than rolling the Success class from one academic year to another, this is just the mid-year change from Fall to Spring. Basically, this is to update some overall data on the Program Record based on the current semester. The trigger for this is changing the Current Academic Semester from Fall to Spring. This change triggers the Process Builder [Current Academic Term is Changed](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/SitePages/Salesforce-Automations.aspx) which in turn triggers the [Current Academic Semester is Updated](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/SitePages/Salesforce-Automations.aspx) process builder. The net results is that Program Record fields like College Attending and Enrollment Status are updated with data from the Spring semester record, which replaces the Fall semester data.  
  
This process should happen \*after\* the March [NSC Data Pull](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/SitePages/NSC-Data-Pulls.aspx) to exclude Fall grads who will not be working with Bottom Line in the spring.  
  
**Make sure that you have a recent Salesforce backup before proceeding.**

**Spring Roll Forward Tech Steps:**

1. Identify the Success students who were served in the Fall who will continue to be served in the Spring. In this case, it should be all  current Active/Inactive, excluding any students who Graduated.
2. Run a Contacts with Program Records (report type) report with the following filters:
   1. Show Me: All Organizations
   2. Last Activity: All Time
   3. Program Record: Record Type = Success
   4. Test Application = False
   5. Stage = Active, Inactive
   6. Current Academic Year = [the current academic year, e.g. 2020 - 21 if it is spring 2021]
3. Must be included in the columns/export:
   1. ProgramRecordID18
   2. ​​​​​​Current Academic Term
4. You can also set yourself up for Success for the Roll Forward Part 1 by unchecking the following fields in the same update:
   1. Create Next Year Academic History Record
   2. Perform Next Year Roll Forward
   3. See steps 5 and 6 of[Roll Forward Part 1](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/SitePages/Success-Roll-Forward.aspx) regarding blanking out/unchecking the checkboxes before running part 1.
5. You can also update this existing report for the current year: [Success Roll Forward to Spring](https://na88.lightning.force.com/lightning/r/Report/00O1Y000006q5U3UAI/view)
6. Export the report into Excel (CSV) and change the value in Current Academic Term from "Fall" to "Spring." Optionally, change the values in Create Next Year Academic History Record and Perform Next Year Roll Forward from 1 to 0.
7. Login to Dataloader.io and run a Program Record update mapping ProgramRecordID18 to Record ID and the Current Academic Term and 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 3 fields because the names came directly from Salesforce.
8. If you run the optional update to null uncheck the checkbox fields Create Next Year Academic History Record and Perform Next Year Roll Forward, 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.**
9. **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.**
10. When the update finishes confirm that the data was updated. Current Academic Term should now say "Spring" and Create Next Year Academic History Record and Perform Next Year Roll Forward fields are "unchecked" in Salesforce.