cLc Transition and Rollover Guidance

For most schools it is time to think about the end of year rollover and planning for next year's intake of new pupils. Depending on how you use the cLc and in particular how you provision your pupil users there are a few considerations to take note of. This document looks at the main scenarios for each dataset, what you will need to do, and what the corresponding outcomes will be.

cLc Pupil Users

All schools will need to rollover their cLc pupil users before the start of the new academic year. The question is: which method of rollover should your school follow? Below are the two methods UniServity recommend.

Which method should our school follow?
If your cLc pupil users have been manually created on an individual basis or populated via the bulk upload/import of a CSV data file, you should follow **Method 1** below.

If your cLc pupil users are synchronised with your MIS via the UniServity MIS Integration Agent software you should follow **Method 2** on page 4.

Method 1 – Manually Created cLc Users / CSV Import

Please follow this method if your cLc pupil users have been manually created on an individual basis or populated via the bulk upload/import of a CSV data file.

The process that you will need to undertake *(as shown below)* will move all existing pupil cLc users up a year (Rollover), place your school leavers into a 'Leavers' profile set, and import the new intake of pupils onto your cLc.

If you already have a 'Leavers' profile set containing previous school leavers, when you rollover your pupil cLc users the new leavers will be added to this profile set. Therefore you should first consider whether it's time to do some housekeeping, review this 'Leavers' profile set, and if necessary delete any previous pupil leavers.

If importing pupil cLc users via the bulk upload of a CSV file after the rollover of existing pupils, it is important to check that the 'year' value for your new intake is set to the year each pupil will be in during the forthcoming academic year. So typically the majority of the new intake of pupils for a secondary school will be Year 7 rather than Year 6.

Step	Description	Who does it?
Step 1: Request Rollover	Send through a rollover request to UniServity with a date from which UniServity are cleared to rollover *(move up a year)* your existing pupil cLc users. This date should ideally be after the end of the academic year and before the new year starts.	*School Admin / cLc Managers*

	You can send this request via either : a) Online via your cLc using the Upload CSV /Rollover page *(See - Control Panel>User Manager>Upload CSV/Imported Data/Roll Over)* b) Calling the UniServity Service Desk on 0845 675 1151 c) Emailing support@uniservity.com	
Step 2: **Process Rollover**	UniServity will confirm receipt of the request and will rollover your cLc pupil users. This will take place on or soon after your requested date. Any leaving pupil cLc users will be placed into a 'Leavers' profile set. The person who has requested the rollover will receive an email from the UniServity Service Desk informing them that the Rollover has been completed.	*UniServity*
Step 3: **Update MIS**	Update your MIS pupil data in the usual way.	*School Admin / cLc Managers*
Step 4: **Check that the rollover has been processed**	This can be done via the Upload CSV /Rollover page *(See - Control Panel>User Manager>Upload CSV/Imported Data/Roll Over)* If the rollover has been processed the 'Status Report' box will display a 'Processed' message with the date/time. UniServity also recommend that you check that your pupils are now in the correct year group by searching and viewing the results for pupil cLc users in a given year group via the cLc Search Users tool. *(See - Control Panel>User Manager>Search Users)*	*School Admin / cLc Managers*
Step 5: **Add New Intake of pupils to your cLc** *(Manually add pupils / Import via bulk upload of CSV file)*	You will now need to add your new intake of pupil users to your cLc. This can be achieved by either manually creating new pupil cLc users on an individual basis or by importing all new cLc pupil users via the bulk upload of a CSV data file. **Manually adding each pupil cLc user:** Add each pupil with their relevant details to the cLc using the Add Pupil tool within the	*School Admin / cLc Managers*

	User Manager component of the cLc. Please note, this is only recommended for very small schools. *(See - Control Panel>User Manager>Add Pupil)* **Bulk upload of all pupil cLc Users via CSV file:** Export your new intake of pupils from your MIS to match the template 'User CSV' file *(available for download from the Upload CSV / Rollover page. See - Control Panel>User Manager>Upload CSV/Imported Data/Roll Over)* Then Upload a completed 'User CSV' file onto the cLc using the Upload CSV tool on the same page.	
Step 6: Bulk Upload of CSV Only – Users Imported	UniServity Service Desk will confirm receipt of any uploaded CSV files and complete the import process. Once completed a field marked 'Processed' will be displayed next to the name of the uploaded CSV file within the Status Report on the Upload CSV /Rollover page of your cLc *(Control Panel>User Manager>Upload CSV/Imported Data/Roll Over)* The cLc user who has requested the CSV import will receive an email from the UniServity Service Desk informing them that the Import has been processed.	*UniServity*
Step 7: Bulk Upload of CSV Only – Check that the Import is a success	UniServity recommend that you check the import has been a success before issuing any usernames and passwords to your new intake of pupil cLc users. This can be achieved by searching and viewing the results for any pupils in a given year group via the cLc Search Users tool. *(See - Control Panel>User Manager>Search Users)* You may also want to test the usernames and passwords for a selection of your new pupil cLc user accounts.	*School Admin / cLc Managers*
Step 8: cLc Profile Sets and Community Groups	You should now ensure that the relevant pupil cLc users are in the correct custom cLc profile sets that have may have been created *(i.e. those that are not year groups, e.g. classes)*	*School Admin / cLc Managers*

> You should also review whether you need to
> manually re-map any custom cLc profile sets
> to the relevant cLc community groups.
> *(Control Panel>User Manager>Profile Sets)*

If you have followed this process you should expect to have all your new intake of pupil cLc users on the cLc and in the correct year group profile sets. You will find a Profile Set called 'Leavers' which contains all pupil cLc users that according to their year group settings are expecting to leave your school.

To learn more about **cLc Profile Sets** and **Community Groups** see the sections on page 7.

To learn more about archiving and retrieving user's **ePortfolios** see the ePortfolios section on page 8.

Method 2 – MIS Integration

Please follow this method if your cLc Users are synchronised with an MIS via the UniServity MIS Integration Agent software or synchronised with another system via other means.

The process that you will need to undertake *(as shown below)* relies on the MIS synchronisation being stopped, your MIS system being rolled-over and updated with the new intake of pupils, and then the MIS synchronisation being re-instated with the new MIS data to keep the cLc user records up-to-date going forward.

Your MIS timetabling for the new academic year will create 'new' teaching classes in the MIS which should be mapped to the previous year's profile sets to give the smoothest rollover experience.

If you already have a 'Leavers' profile set containing previous school leavers, when you rollover pupil cLc users then the new leavers will be added to this profile set. Therefore you should first consider whether it's time to do some housekeeping, review this 'Leavers' profile set, and if necessary delete any previous pupil leavers.

Step	Description	Who does it?
Step 1: Request Rollover	Send through a rollover request to UniServity with a date from which UniServity are cleared to rollover *(move up a year)* your existing pupil cLc users. This date should ideally be after the end of the academic year and before the new year starts. You can send this request via either : a) Online via your cLc using the Upload CSV /Rollover page *(See - Control Panel>User Manager>Upload CSV/Imported Data/Roll*	*School Admin / cLc Managers*

	Over) b) Calling the UniServity Service Desk on 0845 675 1151 c) Emailing support@uniservity.com	
Step 2: Turn off MIS services	Turn off the MIS services from the UniServity MIS agent software by opening the agent, going to the services tab and clicking on the 'STOP' button.	*School Admin / cLc Managers*
Step 3: Stop the MIS Auto-Sync	UniServity will stop the MIS auto-synchronisation from the rollover date requested. Disabling this auto-sync will allow you to work on your MIS rollover without work-in-progress being synchronised with the cLc.	*UniServity*
Step 4: Rollover Processed	UniServity will then rollover your cLc pupil users *(move them up a year)* and place all the leaving pupil cLc users into a 'Leavers' profile set. This will take place on or soon after your requested date. The cLc user who has requested the rollover will receive an email from the UniServity Service Desk informing them that the Rollover has been completed.	*UniServity*
Step 5: Update MIS	You should perform the end of year process for MIS in the usual way.	*School Admin / cLc Managers*
Step 6: Run the MIS sync tool	Start the services on the UniServity MIS agent by opening it up and going to the services tab and clicking the 'Start' button. This will make the new MIS data (users and teaching classes) ready to synchronise with the cLc.	*School Admin / cLc Managers*
Step 7: Map Teaching Classes	With the new teaching classes in your MIS you are now required to map these to any existing cLc profile sets and create new ones where appropriate. Go to the Upload CSV page and do this by: 1. Click 'Reset Classes' 2. Click 'Map Existing Classes'. The cLc helps by 'best guessing' MIS classes to cLc Profile sets based on user's names but it is important to double check these	*School Admin / cLc Managers*

	are correct. Tick the boxes where correct and click 'update' 3. Click on the 'Process Classes' button and map any classes which are currently unmapped *(See - Control Panel>User Manager>Upload CSV/Imported Data/Roll Over)*	
Step 8: Synchronise Data	**ONLY when you are happy with the teaching class mappings you should press the 'Synchronise Data' button and this will process the first import.**	*School Admin / cLc Managers*
Step 9: Request Auto-Sync	Either Contact the UniServity Service Desk to inform us to restart the Auto synchronisation or click the 'enable sync' button, which will send an e-mail to UniServity Support. You will then be informed by the UniServity Service Desk via e-mail once the auto-sync has been enabled.	*School Admin / cLc Managers*

If you have followed this process you should expect to have all your new intake of pupil cLc users on the cLc and in the correct year group profile sets. You will find a **Profile Set** called Leavers containing your school leavers and you will also have created a new set of teaching class **Profile Sets** for the forthcoming Academic year.

To learn more about **cLc Profile Sets** and **Community Groups** please see the sections on page 7.

To learn more about archiving and retrieving user's **ePortfolios** from their old school please see the ePortfolios section on page 8.

cLc Profile Sets

What are cLc Profile Sets?
The cLc allows you to easily manage your users via the use of cLc Profile Sets. All cLc users are placed into either an 'Adult' or 'Pupil' profile set, depending on how they were created. All cLc Pupil users must also be placed into the relevant 'Year' group profile set.

What are Fixed cLc Profile Sets?
Both Adult/Pupil and 'Year' Group Profile sets are fixed and cannot be deleted from the cLc.

'Year' Group Profile Sets
The 'Year' Group profile sets for your Pupil cLc users are automatically updated when following both rollover methods.

What are Custom cLc Profile Sets?
It is possible to add additional custom profile sets to the cLc, i.e. teaching classes. If you are using the UniServity MIS Integration Agent software and following **Method 2,** you will also have the option to synchronise your MIS teaching classes with these custom Profile Sets.

Teaching Class Profile Sets
The Teaching 'Class' profile sets are re-mapped if you follow **Method 2**. The purpose of re-mapping the teaching classes is to point the new MIS classes to the previous year's cLc profile sets. If you re-define the users within these profile sets then the **cLc Community Groups** & **Resource** permissions that are associated with these profile sets do not need to be changed.

Other Custom Profile Sets
Any other custom profile sets will have to be manually reviewed, and if necessary updated after the rollover process.

cLc Community Groups

What are cLc Community Groups?
It is possible to build up your cLc learning platform with a number of cLc Community Groups. Each cLc Community Group can be set-up with its own access permissions and unique membership of cLc Users (Adult or Pupils). This membership functionality then allows those cLc uses with the relevant permissions to personalise or restrict the access of any group content to Community Group members.

If the membership to any of your cLc Community Groups is managed using cLc Profile Sets and the cLc users within these Profile Sets have been updated as part of the rollover process, then membership to these Groups will belong to the new cLc users within theses Profile Sets with immediate effect.

If any of your cLc Community Group memberships are defined by selecting individual cLc Users then even after the rollover has been completed the membership to those Groups will consist of the same cLc users as before and may need to be manually re-configured.

It is possible to hide cLc Community Groups if you want to re-organise them and not allow members to view the work in progress. Simply change the security to 'Not Live'. *(See - Control Panel>Group Admin>Security)*

It is also possible to create new **cLc Community Groups** from any selected **Profile Sets.** This will automatically dynamically map the profile set to the Group membership. *(See - Control Panel>User Manager>Profile Sets)*

Content, Resources & ePortfolios

cLc Resources either belong within a **cLc Community Groups** or in a User's **ePortfolio My Resources**.

cLc Resources in **Community Groups** will remain in these groups until you delete the **resource** or the **Group**. If you wish to delete a **cLc Community Group** but want to keep its **Resources** you should consider exporting the **resources** for future import, saving the files locally or copying the desired **resources** to another **Group or ePortfolio**

ePortfolios stay with the cLc user during rollover, providing the user is staying at the same school.

We have developed a new tool for allowing cLc users to take their ePortfolios with them to another school's cLc. This process will allow schools to archive their pupils ePortfolios from the Search Users page. It then allocates an 'Activation Key' for each archived ePortfolio. Each cLc user, or the new school the user will belong to can then retrieve the ePortfolio from the archive using the 'Activation Key'.

cLc user's homepage are saved as a custom page during the archive process to make it easy to copy and paste content into the new ePortfolio if desired.

Forums and Blogs are consolidated and saved as a cLc custom page during the archive process. This allows users to capture and save the content even when new school doesn't recognise the old usernames.

If cLc users are moving to a school that does not have a cLc they should download their resources locally and make their own copy of the files and content.

More detailed instructions will be published on www.clcsuccess.com nearer the time.