


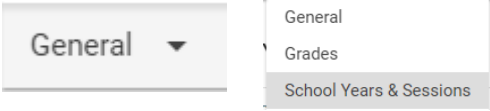
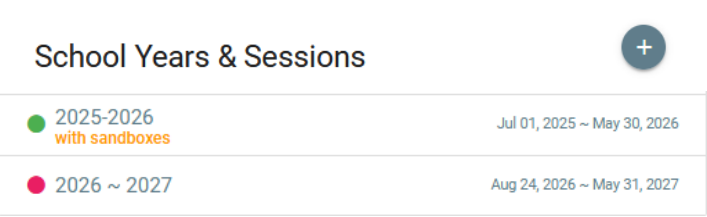
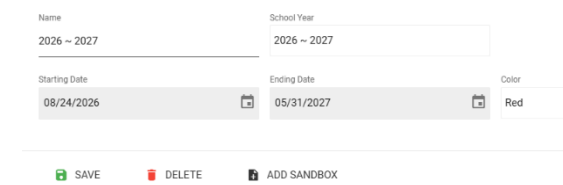
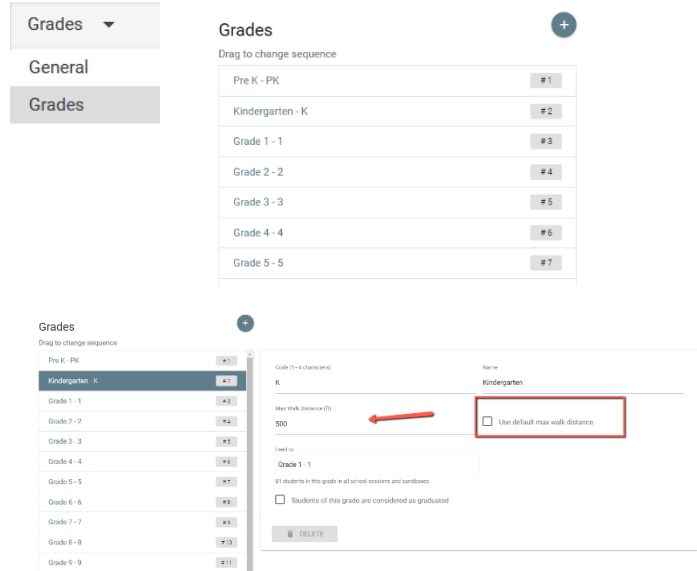
School Year Session Rollover Process

Outline Checklist:

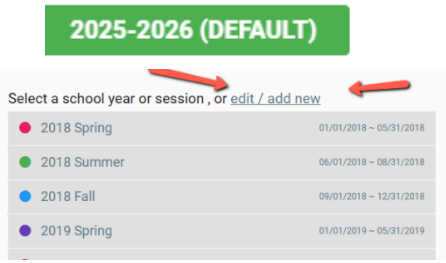
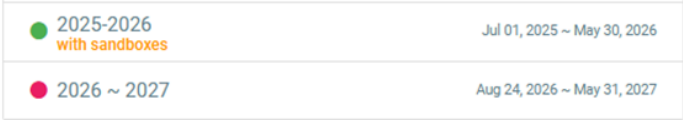
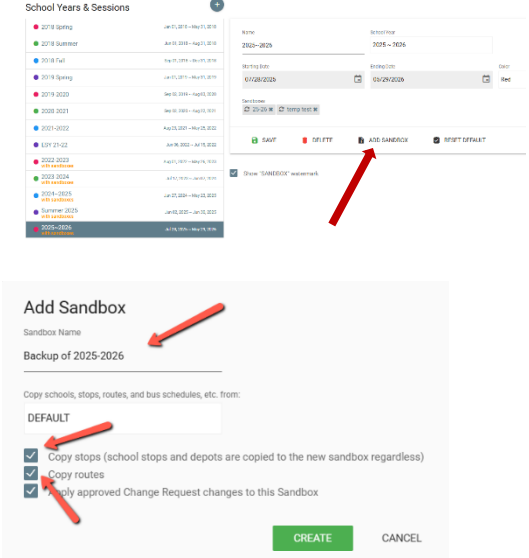
- Step 1: Check school session start date and grade settings.
- Step 2: Create a sandbox as a backup before beginning the rollover.
- Step 3: Conduct the Rollover from the CURRENT school session.
- Step 4: Clone the routes from the previous school session.
- Step 5: Clone Transportation Plans from the previous school session.
- Step 6: Remove graduated students from routes in the NEW school session.
- Step 7: Adjust the bus schedules for students whose school change affected transportation. (EX. Elem to Middle, Middle to High, etc.)
- Step 8: Final Clean Up: Route all unrouted students who did not get routed with Auto Assign.

You can print this page to use as a checklist if you are already familiar with the rollover process.

Step 1: Check School Start Date and School Session and Grade settings.

<p>To begin a new school year, the Travel Tracker has a rollover process that will assist in rolling over students to the new grade.</p>	<p>**THIS EXAMPLE ASSUMES ROLLING OVER FROM 2025-2026 to 2026-2027.</p> <p>Example: Current Year/Semester= 2025-2026 Year/Semester = 2026-2027</p>
<p>Before starting this process, we'll need to set up your new School Session and check your feed grades and schools.</p>	
<p>Click on the General settings drop-down and select 'School Years & Sessions'</p>	
<p>Setup your School Session for the coming year if not already in the list. If they are in the list, check the dates and adjust if needed. Use the "+" icon to add new School Sessions if needed.</p>	
<p>When you add a School Session, use the actual calendar year. The school year will calculate and display when you click Save.</p> <p>Click Save to save the School Session.</p>	
<p>Click on the Grades option in the drop-down filter. Double check grades to make sure they are in the correct sequence.</p> <p>*While in the Grades sections, this would be a good opportunity to review your walking distance for each grade to make sure they are correct.</p>	

Step 2: Create a sandbox before beginning the rollover

<p>You may want to make a backup of the database before starting the rollover. We will set up a sandbox to create our “backup”. Go to current school session and choose edit/add new.</p>	
<p>Click the school session for 2025-2026 in the list</p>	
<p>Then you are going to choose Add Sandbox. Name the sandbox “Backup of 2025-2026” You will want to check the stops and routes box and then choose Create to make your sandbox. This sandbox can be deleted once the rollover is complete and there are no issues. If you need to use the sandbox, you can reset the sandbox as your default database.</p>	

Please Read Before Continuing with the Next Step:

The following is important information and directions about what to do in the next steps depending on where your SIS is. Please read carefully.


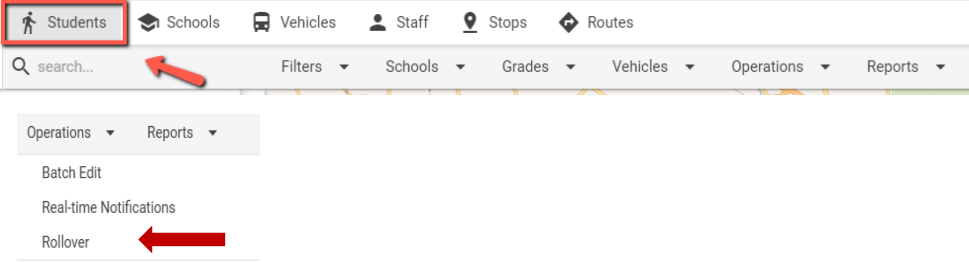
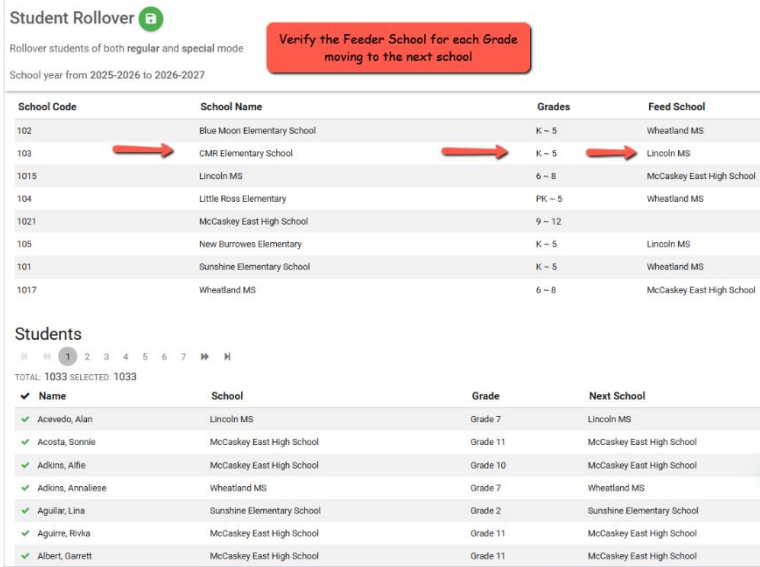
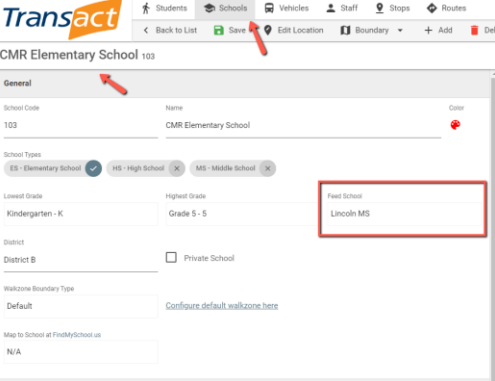

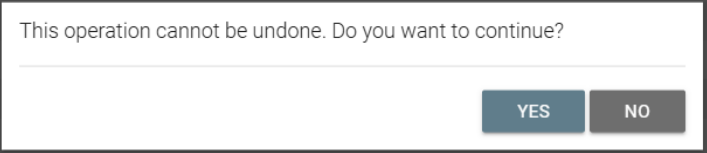
No nightly updates into your system from your SIS system: Follow steps 3-7.

Nightly Updates from your SIS, and your SIS has not rolled over: Follow steps 3-7.

Nightly updates from your SIS, and your SIS has rolled over: Skip step 3, continue with steps 4-7

Note: The system compares the file that comes through nightly to what is already in the system. Once your file has >50% of students with a grade change, it will start syncing to the upcoming school year. This will correct any incorrect grades for students who did not advance or any incorrect schools for districts with multiple feed schools.

Step 3: Conduct the Rollover from the CURRENT School Session

<p>IN THE UPPER RIGHT CORNER, MAKE SURE YOU ARE IN THE CURRENT SCHOOL YEAR BEFORE YOU DO THE ROLLOVER!</p>																																																																					
<p>Click on the Students tab. Click on Operations and then Rollover.</p>																																																																					
<p>Verify the feeder schools. If any of these are incorrect, *Stop and go to the schools tab and edit the school to set the correct feeder. (See below for instructions)</p> <p>The list below will show all students and the next grade that will be indicated for the student.</p>	 <table border="1"> <thead> <tr> <th>School Code</th> <th>School Name</th> <th>Grades</th> <th>Feeder School</th> </tr> </thead> <tbody> <tr> <td>102</td> <td>Blue Moon Elementary School</td> <td>K - 5</td> <td>Wheatland MS</td> </tr> <tr> <td>103</td> <td>CMR Elementary School</td> <td>K - 5</td> <td>Lincoln MS</td> </tr> <tr> <td>1015</td> <td>Lincoln MS</td> <td>6 - 8</td> <td>McCaskay East High School</td> </tr> <tr> <td>104</td> <td>Little Ross Elementary</td> <td>PK - 5</td> <td>Wheatland MS</td> </tr> <tr> <td>1021</td> <td>McCaskay East High School</td> <td>9 - 12</td> <td></td> </tr> <tr> <td>105</td> <td>New Burrows Elementary</td> <td>K - 5</td> <td>Lincoln MS</td> </tr> <tr> <td>101</td> <td>Sunshine Elementary School</td> <td>K - 5</td> <td>Wheatland MS</td> </tr> <tr> <td>1017</td> <td>Wheatland MS</td> <td>6 - 8</td> <td>McCaskay East High School</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Name</th> <th>School</th> <th>Grade</th> <th>Next School</th> </tr> </thead> <tbody> <tr> <td>Acevedo, Alan</td> <td>Lincoln MS</td> <td>Grade 7</td> <td>Lincoln MS</td> </tr> <tr> <td>Acosta, Sonnie</td> <td>McCaskay East High School</td> <td>Grade 11</td> <td>McCaskay East High School</td> </tr> <tr> <td>Adkins, Alfie</td> <td>McCaskay East High School</td> <td>Grade 10</td> <td>McCaskay East High School</td> </tr> <tr> <td>Adkins, Annaliese</td> <td>Wheatland MS</td> <td>Grade 7</td> <td>Wheatland MS</td> </tr> <tr> <td>Aguilar, Lina</td> <td>Sunshine Elementary School</td> <td>Grade 2</td> <td>Sunshine Elementary School</td> </tr> <tr> <td>Aguirre, Rivka</td> <td>McCaskay East High School</td> <td>Grade 11</td> <td>McCaskay East High School</td> </tr> <tr> <td>Albert, Garrett</td> <td>McCaskay East High School</td> <td>Grade 11</td> <td>McCaskay East High School</td> </tr> </tbody> </table>	School Code	School Name	Grades	Feeder School	102	Blue Moon Elementary School	K - 5	Wheatland MS	103	CMR Elementary School	K - 5	Lincoln MS	1015	Lincoln MS	6 - 8	McCaskay East High School	104	Little Ross Elementary	PK - 5	Wheatland MS	1021	McCaskay East High School	9 - 12		105	New Burrows Elementary	K - 5	Lincoln MS	101	Sunshine Elementary School	K - 5	Wheatland MS	1017	Wheatland MS	6 - 8	McCaskay East High School	Name	School	Grade	Next School	Acevedo, Alan	Lincoln MS	Grade 7	Lincoln MS	Acosta, Sonnie	McCaskay East High School	Grade 11	McCaskay East High School	Adkins, Alfie	McCaskay East High School	Grade 10	McCaskay East High School	Adkins, Annaliese	Wheatland MS	Grade 7	Wheatland MS	Aguilar, Lina	Sunshine Elementary School	Grade 2	Sunshine Elementary School	Aguirre, Rivka	McCaskay East High School	Grade 11	McCaskay East High School	Albert, Garrett	McCaskay East High School	Grade 11	McCaskay East High School
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<p>*To correct Feeder Schools if they are not correct, go to the schools tab and edit to select the correct Feeder* Then return to Student Tab and Select Operations and then Rollover as shown above.</p>																																																																					
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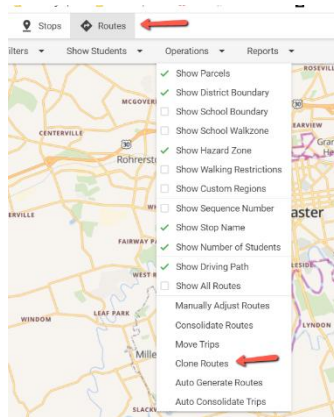
Step 4: Clone the routes from the previous School Session

After the rollover, you will need to clone the routes from the CURRENT school session into the NEW school session

Make sure you are still in the current session before cloning.

2025-2026 (DEFAULT)

Go to the Routes tab, Operations, and choose Clone Routes



Select which school session to clone the routes to (2026-2027) Click on Select All to check all routes, and then click on the Clone Routes button.

Clone Routes

Copy routes from 2025-2026 (DEFAULT) to:

2026 ~ 2027

Make sure you make the selection for the next school year.

Overwrite existing routes / trips of the same name

Select the routes you want to clone

SELECT ALL

CLONE ROUTES

Route Name	# Trips	Vehicle	Duration	Distance
<input type="radio"/> 11-18 Test	1		0h 00m	-
Trip Name				
<input type="radio"/> AM				
<input type="radio"/> 8-5-25 Lincoln Route	1	TC1	0h 00m	-
Trip Name				
<input type="radio"/> AM				
<input type="radio"/> Burrowes SE 100	2	SE 100	2h 04m	32.8 mi
Trip Name				
<input type="radio"/> BUR SE AM1				
<input type="radio"/> BUR SE PM1				
<input type="radio"/> Bus 01 - Wheatland MS	2	Bus 01	2h 40m	
Trip Name				


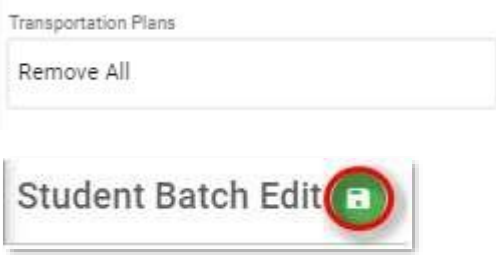
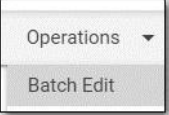
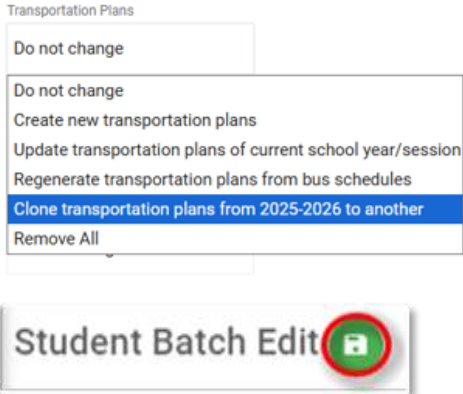
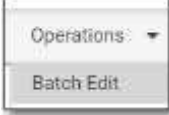
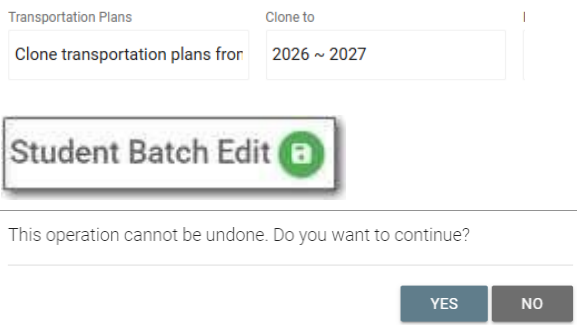
Click Yes to confirm.

This action cannot be undone. Do you want to continue?


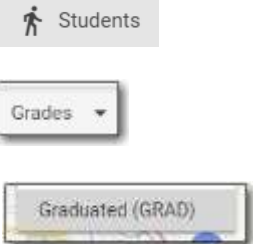
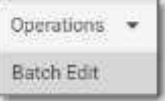
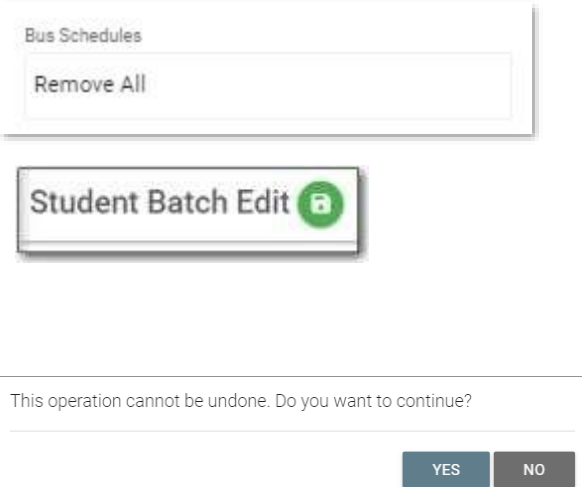
YES

NO

Step 5: Clone Transportation Plans from the previous School Session (You will need to do this step even if your district does not currently use Transportation Plans. This will allow you to use the Auto Assign feature to re-route your students with a school change in an upcoming step)


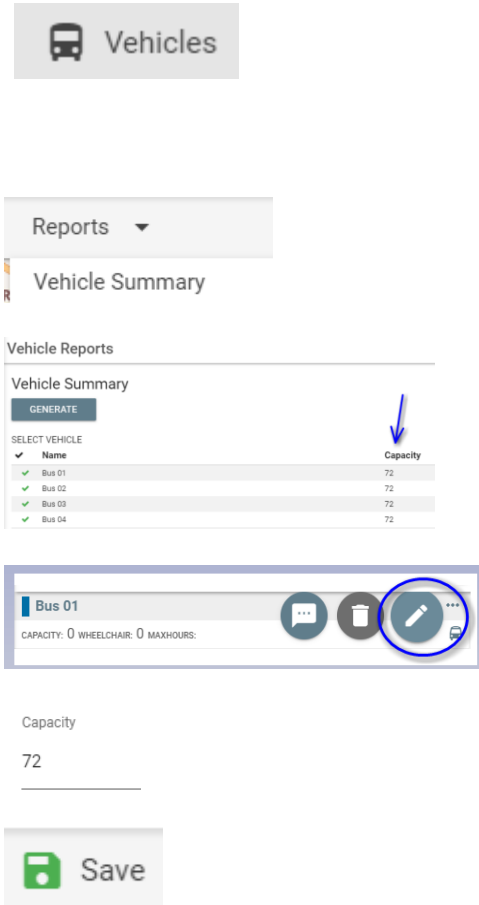

<p>From the Students tab (in the current school session 2025-2026), click on Operations, and choose Batch Edit</p>	
<p>Under "Transportation Plans," select "Remove All."</p> <p>Then, click the green "save" button at the top of the Batch Edit page</p> <p>We will regenerate these in just a moment in an upcoming step. They will be generated from your current bus schedules.</p>	
<p>Once you click save, go back into the Batch Edit tool.</p>	
<p>Under "Transportation Plans," select "Regenerate transportation plans from bus schedules" and click the green save button at the top of the Batch Edit page.</p> <p><u>Note: This step ensures that transportation plans match the correct bus schedules for routed students.</u></p>	
<p>Go back to the Batch Edit tool one more time.</p>	
<p>Under Transportation Plans select "Clone transportation plans" then select "Clone to 2026-2027". Click on the green save button. Click Yes to confirm. This will take a few minutes to run.</p>	

Step 6: Remove graduated students from routes in the NEW School Session


<p>SWITCH TO THE NEW SCHOOL SESSION IN THE UPPER RIGHT</p>	
<p>We will want to first remove the graduated students from the routes in the New School Session. Click on the Students tab, Filter for Grades and selected Graduated</p>	
<p>Click on Operations, Batch Edit</p>	
<p>Under Bus Schedules, select "Remove All." This will remove all bus assignments for graduated students.</p> <p>Click the Green Save button</p> <p>Click Yes to continue.</p>	

Step 7: Adjust the bus schedules for students whose school change affected transportation (EX. Elem to Mid and Mid to High, etc.)

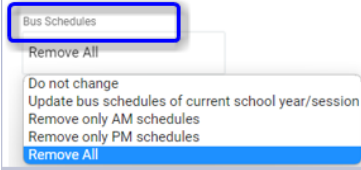
For students who moved from Elementary to Middle schools and from Middle to High Schools or any other situation where the rollover created a school for a grade promotion, you will need to locate those students and adjust their bus schedules. You will want to start with the Middle schoolers that moved to High school before doing the elementary to middle students, so that you can ensure spaces on buses for elementary to middle students and new kindergarteners.

<p>REMEMBER TO STAY IN THE NEW SCHOOL SESSION</p>	
<p>Under the Vehicles tab, check your vehicles to make sure none of them have zero (0) capacity. Otherwise, this will cause problems when you try to auto assign students.</p> <p>To quickly see bus capacities: Click the Report drop down and select the Vehicle Summary Report. The capacities will show.</p> <p>If any show 0, edit the vehicle, and update the capacity.</p> <p>Don't forget to Click Save</p>	
<p>Go to the Students tab</p> <p>filter on Grades</p> <p>Select 9th grade (or the grade that moves to High School at your district).</p> <p>Then select Filters, Riders, All Riders (It is very important to have only the students you want to Auto Assign marked as Riders)</p>	

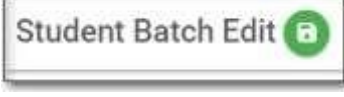
Click on Operations
Batch Edit



Under
'Bus Schedules'
Select 'Remove All'

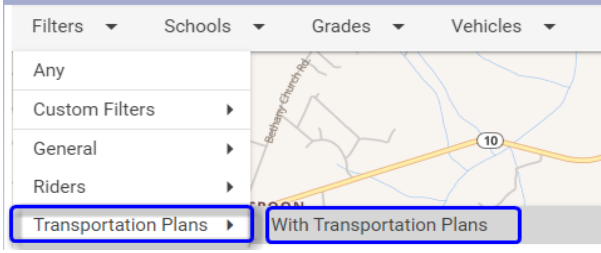
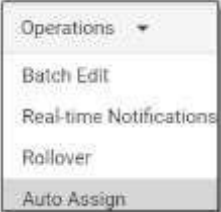


Click on the green save icon.



NOW WE WILL ROUTE THE 9th GRADERS TO THEIR NEW ROUTES.
You should still be on the students tab and be filtered for 9th graders and add the filter with Transportation Plans.

Go to Operations
Click Auto Assign

Click Search Assignments.
This will search for those students that can be routed using existing trips based on their transportation plans.

Review the assignment suggestions.

If they look correct,
Click Save Assignments.

SEARCH ASSIGNMENTS

✓ Name	School	Grade	Bus	Pickup	Dropoff
✓ Barclay, Kaitlyn	Lincoln MS	6	Bus 11 5 / 72	Howard Avenue & Pershing Avenue 7:14 AM	Lincoln MS 7:35 AM
Every weekday (06/27/2024 ~ 05/29/2025)					
✓ Blackwell, Karan	Wheatland MS	6	Bus 02 27 / 72	35 SCHOOL HOUSE RD 7:37 AM	Wheatland MS 7:40 AM
Every weekday (06/27/2024 ~ 05/29/2025)					
✓ Blackwell, Karan	Wheatland MS	6	Bus 02 27 / 72	Wheatland MS 3:05 PM	35 SCHOOL HOUSE RD 3:10 PM
Every weekday (06/27/2024 ~ 05/29/2025)					
✓ Carlson, Roza	Wheatland MS	6	SE 102 7 / 17	117 E NEW ST 8:21 AM	Little Ross Elementary 8:27 AM
Every weekday (06/27/2024 ~ 05/29/2025)					

SAVE ASSIGNMENTS

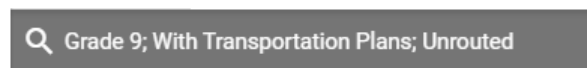
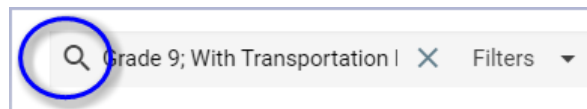
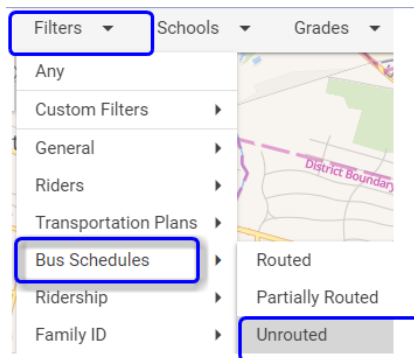
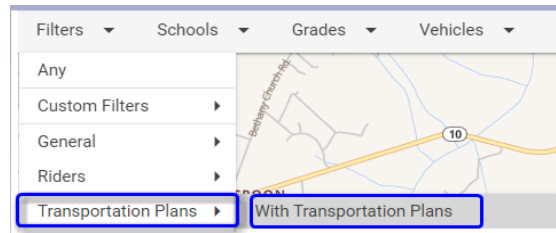
You may have students who are not routed automatically because their previous stop is not currently on a route going to their new attending school.

To see the 9th Grade students that didn't get routed:
Go to Filters,
Transportation Plans
With Transportation Plans

Then go back to Filters,
and choose Bus Schedules
Unrouted

To verify the filtering is correct,
click on the magnifying glass in
the search bar.

This should be showing:
Grade 9
With Transportation Plans
Unrouted



*****Repeat step 7 for other grades that moved schools (for example from Elementary to Middle).**

Step 8: Final Clean up-Route all Unrouted Students who did not get routed with Auto Assign.

<p>To route the unrouted students that were previously routed and that did NOT auto assign, use the routing techniques you are already familiar with using.</p>	
<p>Note: To identify all Students that were routed in the previous school session that did not get auto assigned, you can identify these by filtering for Transportation Plans and Unrouted students</p>	