

Information Transfer between Cycles

If there are any outcomes, measures, or achievement targets that you would like to re-address in a new planning cycle, you can do this without having to copy and paste. It requires that the "Active through cycle" information in the current cycle be set a specific future cycle or listed as "keep active" (if you want it carried forward indefinitely). You can make this change at any time without affecting any of your current cycle reporting.

To "recycle" an outcome:

1. Select your current cycle
2. Click on Assessment tab to select Outcomes/Objectives
3. Click on the arrow beside the outcome that you wish to carry over
4. Hit the edit button located underneath the outcome
5. In the "Active through cycle" box select a specific future cycle or "keep active" (if you want it carried over indefinitely). **Do not change the "established in cycle date" if enabled. Doing so can result in a loss of data!** Be sure to hit "save" after the selection has been made.

To "recycle" a measure:

1. Select your current cycle
2. Click on Assessment tab to select Measures & Findings
3. Click on the arrow beside the measure that you wish to carry over
4. Click on the "add relationships" button located just underneath the text box. Put a check in the box next to the outcome that it supports. This connection must be made in order for your measure to appear in the future cycle. This will also do these 3 things:
 - a. Bring over the current achievement target (if it has been set to carry over to a future cycle)
 - b. Bring over the current findings (for historical reference)
 - c. Place an "add finding" and "edit achievement target" button in your new measure.

[If you did not choose to recycle the achievement target (by keeping it active only in the current cycle), you will simply see an "add achievement target" button underneath the measure in the future cycle. You can then put in a new achievement target.]

5. In the "Active through cycle" box select a specific future cycle or "keep active" (if you want it carried over indefinitely). **Do not change the "established in cycle date" if enabled. Doing so can result in a loss of data!** Be sure to hit "save" after the selection has been made.

This will carry over all information to your future cycle. You will be able to make editing changes in the new cycle without affecting the current cycle. If the outcome or measure in the future cycle is to be significantly different from the current cycle, do not carry it over. Make the "active through cycle" date match the "established in cycle" date (to prohibit carry-over) and start "from scratch" to enter new information in the future cycle.