# Using the Proxy Wizard

The Proxy Wizard enables you to reduce the amount of scanning, importing, manual data entry, and online testing normally required at the beginning of a program year. This feature "carbon copies" records from the previous program year and creates new records in the current program year with a date of July 1.The wizard gives you an option to create *Class Enrollments*, *Program Enrollments*, *Test*, and *Student Activity Records*.

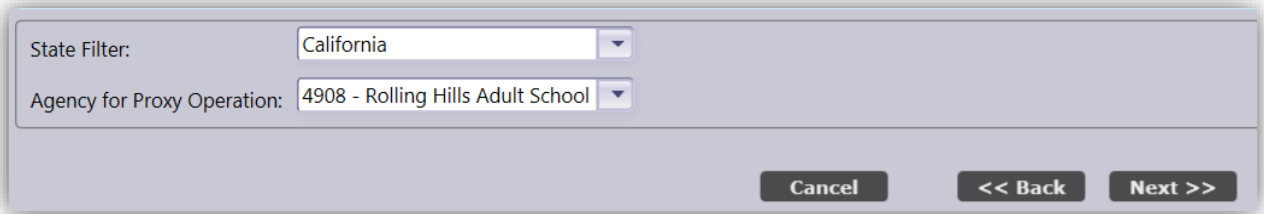This exercise details how to proxy *Tests* from the previous program year.

1. On the *Tools* menu, select *Proxy Wizard* to open this feature

2. This window describes the proxy process and prompts you to select the correct program year. Indicate whether you wish to create new records or remove existing proceed records. Verify the current program year, select *Create proxy records*, and click **Next**.
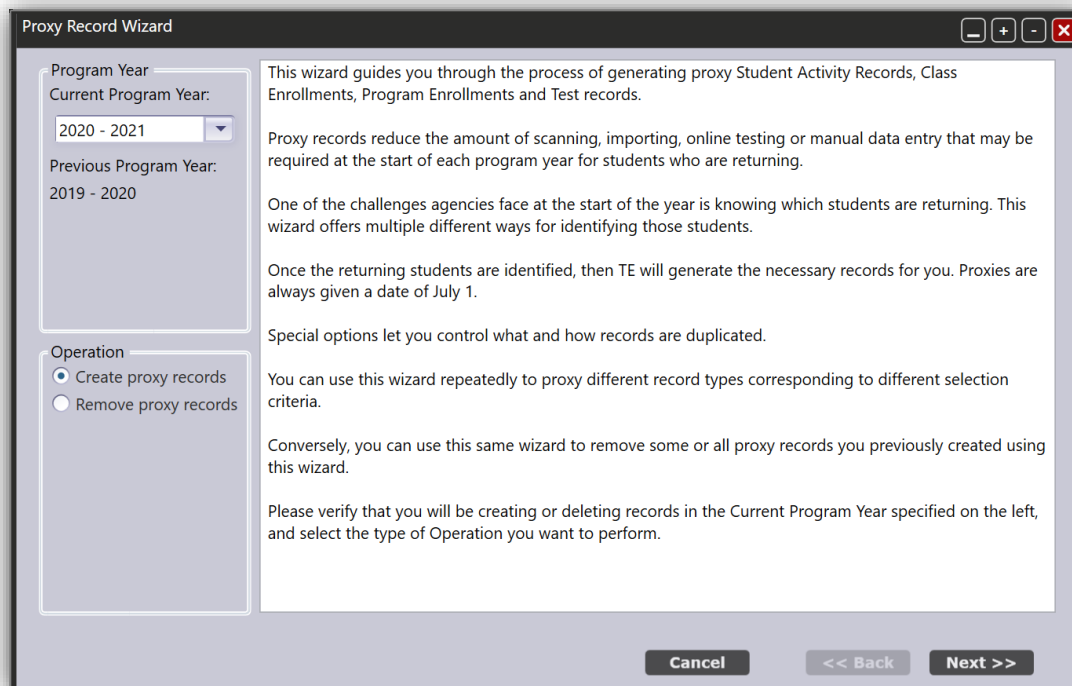
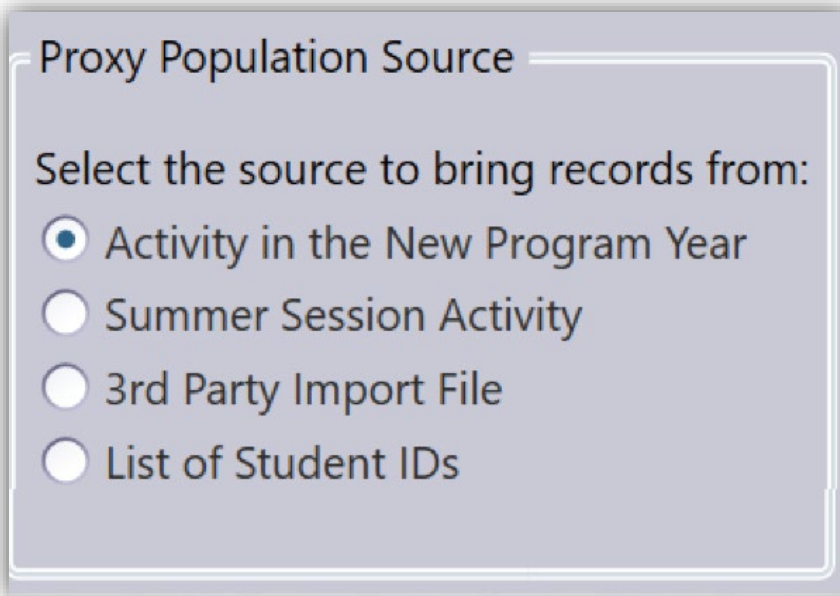3. On the next window, verify the correct State and Agency, then click **Next**.

| State Filter: | California ▾ |
| Agency for Proxy Operation: | 4908 - Rolling Hills Adult School ▾ |

Cancel   << Back   Next >>

4. The next window provides four different options for determining which records to proxy.


Proxy Population Source

Select the source to bring records from:

- ● Activity in the New Program Year
- ○ Summer Session Activity
- ○ 3rd Party Import File
- ○ List of Student IDs

- *Activity in the New Program Year* will create records for students who already have a record in the current program year dated between July 1st – September 30th.
- *Summer Session Activity* will create records from the previous program year dated between May 12th – June 30th.
- *3rd Party Import File* enables you to proxy that you created from your 3rd party attendance system.
- *List of Student IDs* enables you to specify students who have records dated between May 12th – June 30th of the previous program year.

Below these four selections is a check box titled, *"Skip Additional Record Filtering"*. Checking this bypasses some basic steps of the proxy process that will frequently require the same choices each time you proxy. Once you are familiar with the proxy feature, you will probably want to check this box to save time when using this wizard. For this exercise, uncheck this box to review all of the steps of the wizard. Selected here is, *Activity in the New Program Year*, click **Next**.

5. The next step prompts you to specify the sites (if you have more than 1), click **Next**.
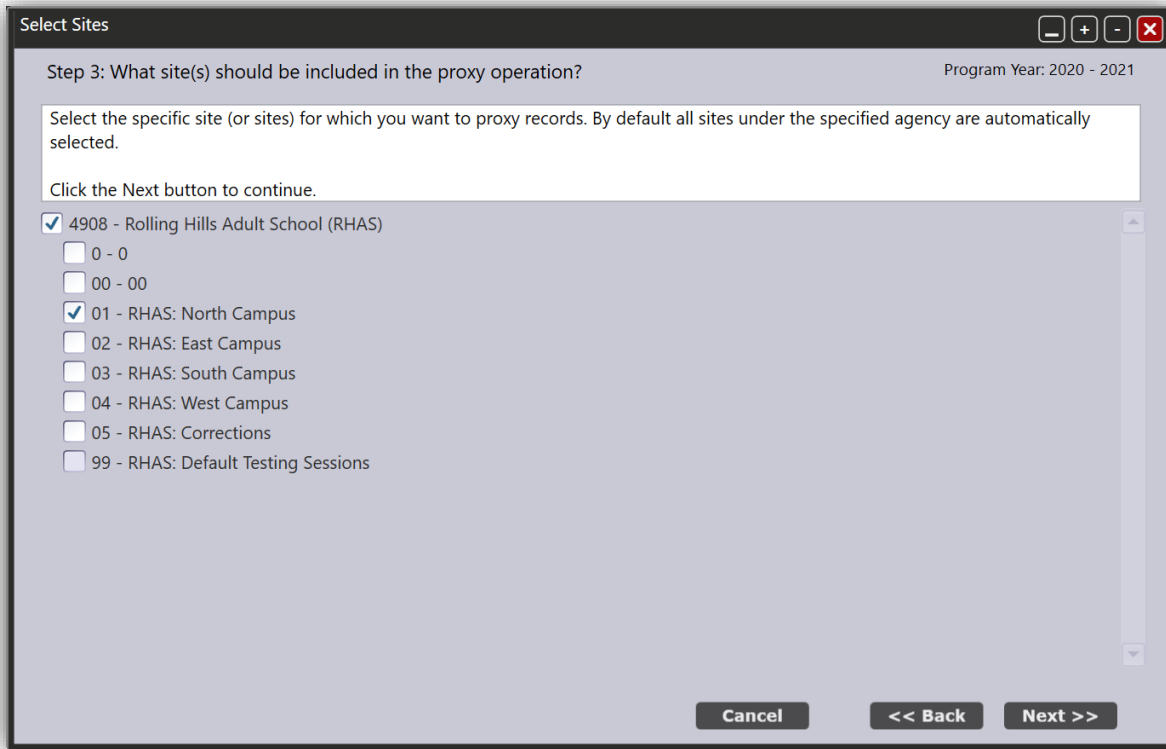
6. The next three windows – identified in the wizard as Steps 4, 5, and 6 – enable you to specify records for proxy by ***Instructional Program***, ***Class***, and ***Individual Student***. Steps 5 and 6 allow you to filter and sort the same way as in the TE listers to narrow down selections.
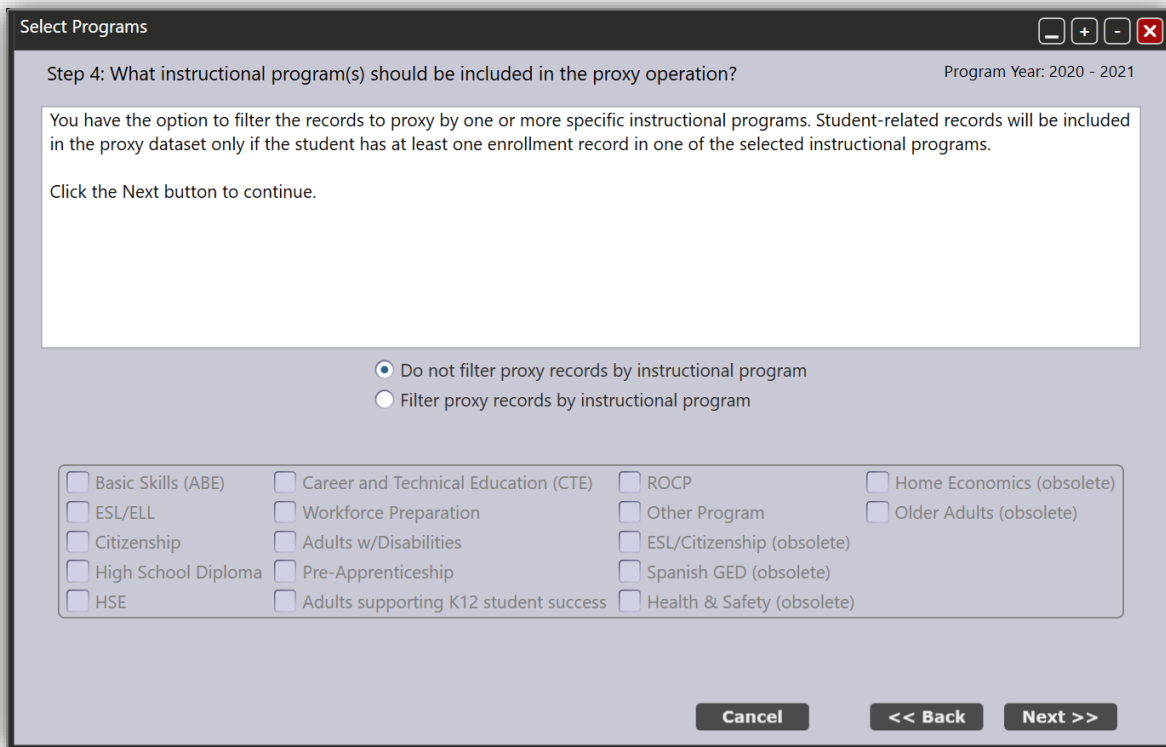
Select Classes

Step 5: What class(es) should be included in the proxy operation?

You have the option to filter the records to proxy by one or more specific classes. Student-related records will be included in the proxy dataset only if the student has at least one enrollment record or one assessment record in one of the selected classes.

Click the Next button to continue.

◉ Do not filter proxy records by classes ○ Filter proxy records by classes

4908 - Rolling Hills Adult School (RHAS) ▾ | Subsites | Filter | Columns | Sort | Batch Delete ✕

☑	⇕	Site	▲₁ Class ID	▲₂ Extended ID	⇕ Class Description	⇕ Class Start Date	⇕ Class End Date	⇕

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Select Students

Step 6: What student(s) should be included in the proxy operation?

You have the option to filter the records to proxy by one or more specific students.

Click the Next button to continue.

◉ Do not filter proxy records by students ○ Filter proxy records by students

4908 - Rolling Hills Adult School (RHAS) ▾ | Aggregated | Subsites | Filter | Columns | Sort

☑	⇕	Site	▲ Student ID	⇕ Name	⇕ Birth Date	⇕ Gender	⇕ Ethnicity

Cancel << Back Next >>

7. Step 7 has a default date range of 7/1 – 9/30 that students must have a record dated between these dates, in order for records from the previous year to be proxied. This date range can be narrowed down but cannot be expanded. Click **Next**.

8. Step 8 displays a list of students who meet the criteria you specified in Steps 3-7 – in this example, students in Site 01 with records dated between 7/1 – 9/30, click Next.

9. Now that active students in the current program year have been selected, you can select the new records types to be created, click **Next**.

Proxy Record Types

Step 9: What record types do you want to create in the new program year?   Program Year: 2020 - 2021

Select the record types you want to copy from the previous program year to July 1 of the new program year.

Based on the selected student population and your selections on this page you will be presented with a list of candidate records to be proxied for each selected type. For each record type you will have the option to further refine the set of records to be proxied.

For class enrollments and test records you will also have the option to change the class associations in order to use new classes you may have defined.

Click Next to setup the final date ranges for the record types to proxy. After this step the wizard will start the retrieval of the record list corresponding to the first selected record type.

Proxy Record Types

Select the record types to proxy:
- ☐ Class Enrollments
- ☐ Program Enrollments
- ☑ Test Records
- ☐ Student Activity Records

Cancel   << Back   Next >>

10. Step 10 provides a date range in which the wizard will locate the data to be proxied, click **Next**.

Select date ranges

Step 10: What date ranges should be applied to the proxy operation?   Program Year: 2020 - 2021

The default date ranges provided are the allowed ranges to get records from. You can narrow these date ranges, but you cannot expand them without the proper user access level.

Class Enrollment Date Range
Custom Interval ▼   from: 1/1/2020 ▼ to: 6/30/2020 ▼

Program Enrollment Date Range
Custom Interval ▼   from: 1/1/2020 ▼ to: 6/30/2020 ▼

Test Date Range
Custom Interval ▼   from: 1/1/2020 ▼ to: 6/30/2020 ▼

Activity Record Date Range
Custom Interval ▼   from: 1/1/2020 ▼ to: 6/30/2020 ▼

Cancel   << Back   Next >>

11. Step 11 enables you to review test records that will be proxied over, you can edit the class information here if desired. Click **Next**.

12. Step 12 allows you to refine the records you proxy. For this exercise, we will simply retain all of the default selections and click **Next**, but the selections are explained in more detail below:

- *Agency Wide Proxy* gives you the opportunity to prevent the creation of proxied records in instances when another record may have already been created in the new program year.
- *Test Proxy Option* excludes all conservative estimate ("diamond") scores when you are proxying test records.
- *Activity Records* allows you to specify that certain fields do not carry over during the proxy. Checking *Labor Force Status*, for example, still allows the new proxy record to be created, but will copy the record without the old labor force status.

13. The final window appears, with a summary of the new records you will create during this proxy. Click **Finish** to complete the proxy and create new records.

Finish

Step 13: Finish   Program Year: 2020 - 2021

The wizard is now ready to start proxying the selected records in each category into the selected program year.

5 test records were selected for being proxied.

Click the Finish button to start the record proxying operation.

Cancel   << Back   Finish
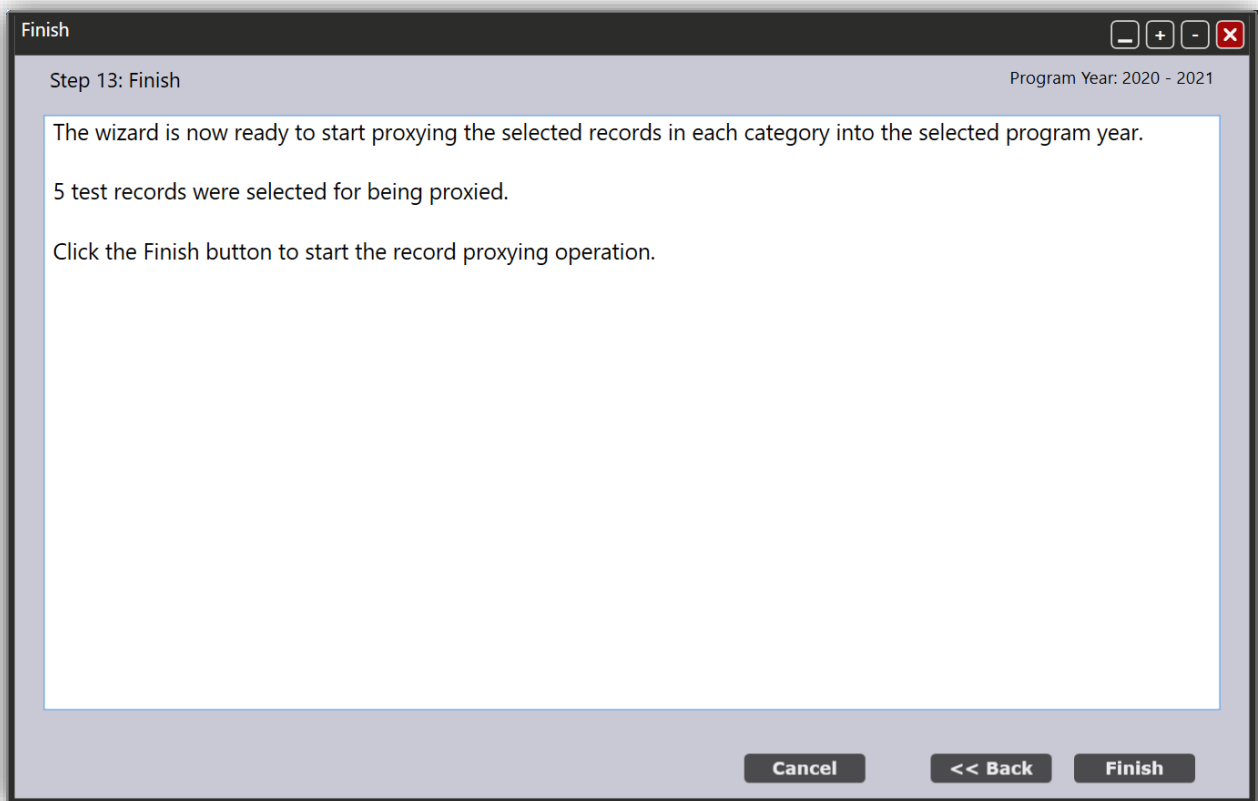
14. Once the process is completed, you have the option to create a **Proxy Summary Report** and a **Proxy Detail Report**. The summary report displays an overview of everything in his proxy session, while the detail lists each record created by student.

Summary report

✔ Do you want to see the summary report for creating proxy records?

Yes   No

Details report

✔ Do you want to see the details report for creating proxy records?

Yes   No