

Using the Proxy Wizard

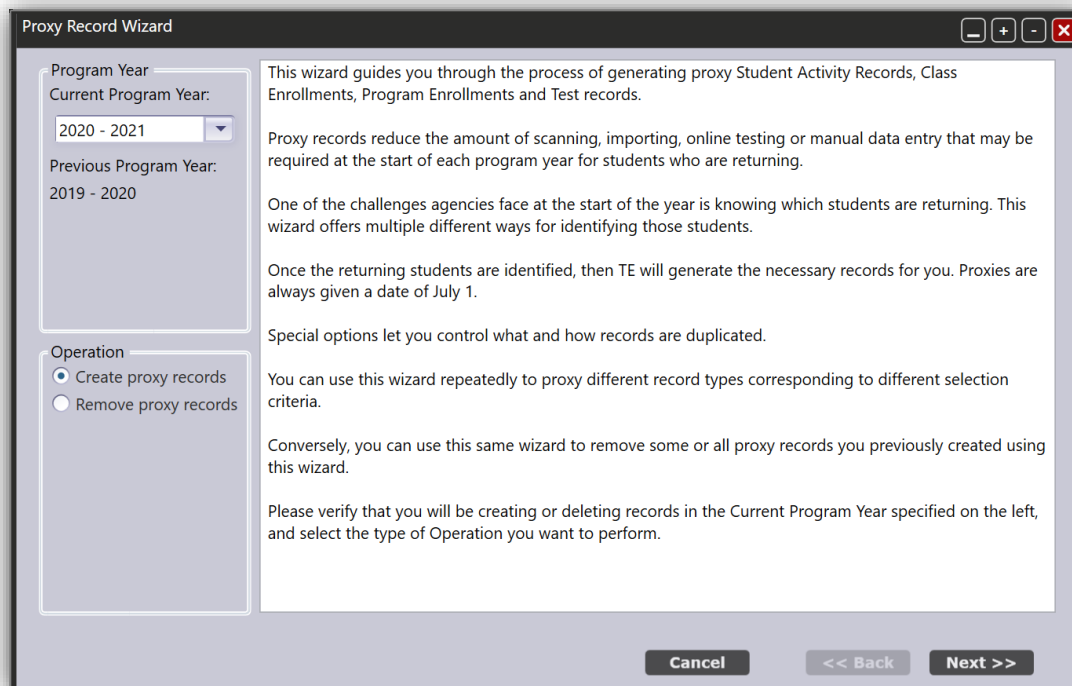
The Proxy Wizard enables you to reduce the amount of scanning, importing, manual data entry, and online testing normally required at the beginning of a program year. This feature “carbon copies” records from the previous program year and creates new records in the current program year with a date of 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.

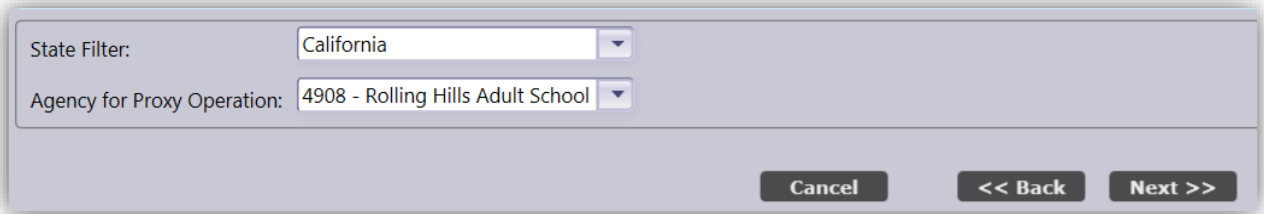
1. On the **Tools** menu, select **Proxy Wizard** to open this feature



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**.

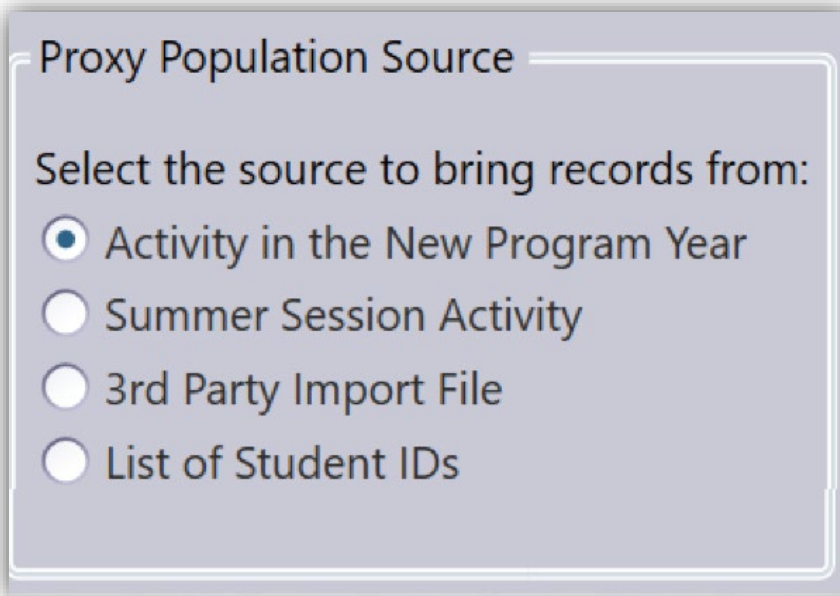


State Filter: California

Agency for Proxy Operation: 4908 - Rolling Hills Adult School

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



Proxy Population Source

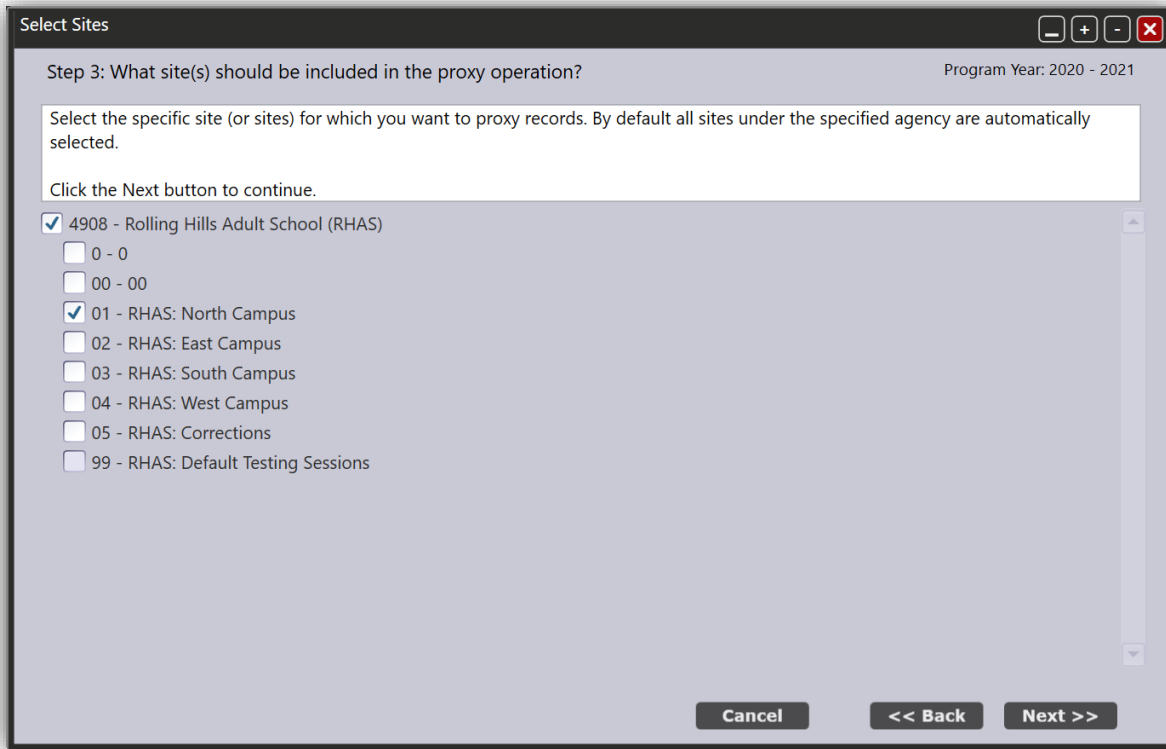
Select the source to bring records from:

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

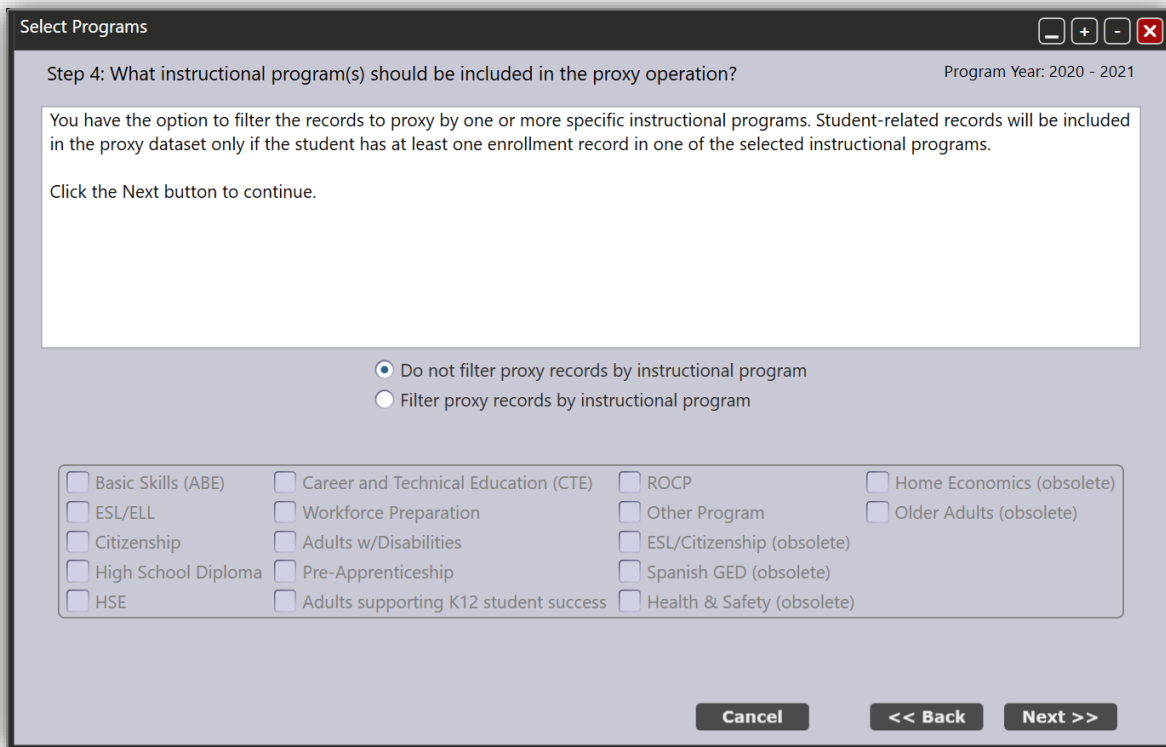
- **Activity in the New Program Year** will create records for students who already have a record in the current program year dated between July 1st – September 30th.
- **Summer Session Activity** will create records from the previous program year dated between May 12th – June 30th.
- **3rd Party Import 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 lists to narrow down selections.



Select Classes

Step 5: What class(es) should be included in the proxy operation? Program Year: 2020 - 2021

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

<input checked="" type="checkbox"/>	Site	▲ ₁ Class ID	▲ ₂ Extended ID	Class Description	Class Start Date	Class End Date
<div style="border: 1px solid #ccc; height: 100%; width: 100%;"></div>						

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Select Students

Step 6: What student(s) should be included in the proxy operation? Program Year: 2020 - 2021

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

<input checked="" type="checkbox"/>	Site	▲ Student ID	Name	Birth Date	Gender	Ethnicity
<div style="border: 1px solid #ccc; height: 100%; width: 100%;"></div>						

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- 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**.

Select activity range

Step 7: What date range should be applied to the proxy operation? Program Year: 2020 - 2021

You have chosen to create proxy records for those students who already have activity in the new program year.

The default date range for the dated records indicating activity is 7/1 - 9/30 of the current program year. You can narrow this date range, but you cannot expand it without the proper user access level.

Click Next to retrieve the initial student population that corresponds to your selection criteria. In the next step you will be able to further adjust this selected population.

Activity Date Range
 Custom Interval from: 7/1/2020 to: 9/30/2020

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- 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.

Student Population Review

Step 8: Review the selected student population Program Year: 2020 - 2021

The list below contains the student population selected after applying the specified criteria.

Use the Delete button provided to remove records from this list. Multiple records can be selected using Control-click.

Proxy records of the specified types will be created only for the remaining students in the list.

Site	Student ID	Student Name
01 - RHAS: North Campus	1	Jason Dexter
01 - RHAS: North Campus	12345C	Jane Doe
01 - RHAS: North Campus	2105476	Estas Tooker
01 - RHAS: North Campus	255825	Jirayr Stepanyan
01 - RHAS: North Campus	2610526	Mary Grace Angelini
01 - RHAS: North Campus	307147	Tomislav Amaya
01 - RHAS: North Campus	442779	Ably Carbajal
01 - RHAS: North Campus	4430178	Shanaye Usui
01 - RHAS: North Campus	4430298	Rufina Spichiger
01 - RHAS: North Campus	4430304	Kimanise Thieu
01 - RHAS: North Campus	4430308	Orfedalia Klinger
01 - RHAS: North Campus	4430327	Myung Hockel
01 - RHAS: North Campus	4430332	Gurvinder Pury

1 record selected from a total of 15. Delete Selected Records

Cancel << Back 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**.

Step 11: Update classes for test records to be copied in the new program year. Program Year: 2020 - 2021

Review the test records this wizard is going to copy in the new program year.

If your agency is using the Extended ID and/or Course Code fields of the Class Definition record for designating an association with a program year (not recommended) this is the step where you indicate the new class definitions associated with this program year.

If the test records from the previous program year were associated with classes, you have also the option to remove these associations for the test records to be created in the new program year (the new records will no longer be bound to classes). Use the Delete Class Link button to clear such associations.

Multiple records can be selected using Control-click. Use the Delete button provided to remove unwanted records from this list.

Only the remaining records in the list will be created in the new program year.

New Class: **Assign Class**

Site	Student	Previous Class	New Class	Assessm... Date	Form
01 - RHAS: North Campus	4430304 / Kimanise...	12401311 - Hig...	12401311 - Hi...	1/16/2020	186R - Life and Work Readin...
01 - RHAS: North Campus	4430304 / Kimanise...	11241311 - Bri...	11241311 - Bri...	5/8/2020	505M - Mathematics Level D
01 - RHAS: North Campus	4430348 / Michael...	12303311 - Hig...	12303311 - Hi...	3/12/2020	187R - Life and Work Readin...
01 - RHAS: North Campus	1 / Jason Dexter			5/7/2020	900R - Reading GOALS Appr...

1 record selected from a total of 5.

Delete Class Link **Delete Selected Records**

Cancel **<< Back** **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:

Step 12: Select data carry forward options for the chosen record types. Program Year: 2020 - 2021

Almost complete. You may refine what gets proxied using the additional options provided.

Several field related options are also provided for the particular case of Student Activity Records to be proxied. Place a checkmark in any field that you want copied forward to the July 1 records. Remove any checkmarks for fields that you want to be blank in those copied records.

Agency Wide Proxy

- Do not proxy Class Enrollments for students with Class Enrollments in this PY
- Do not proxy Program Enrollments for students with Program Enrollments in this PY
- Do not proxy Tests for students with Test records in this PY
- Do not proxy Student Records for students with Activity records in this PY

Test Proxy Option

- Do not proxy test records having conservative estimate scale scores

Activity Records

Entry Data

- Attainable Goal
- Special Programs
- Personal Status
- Labor Force Status
- Instructional Level

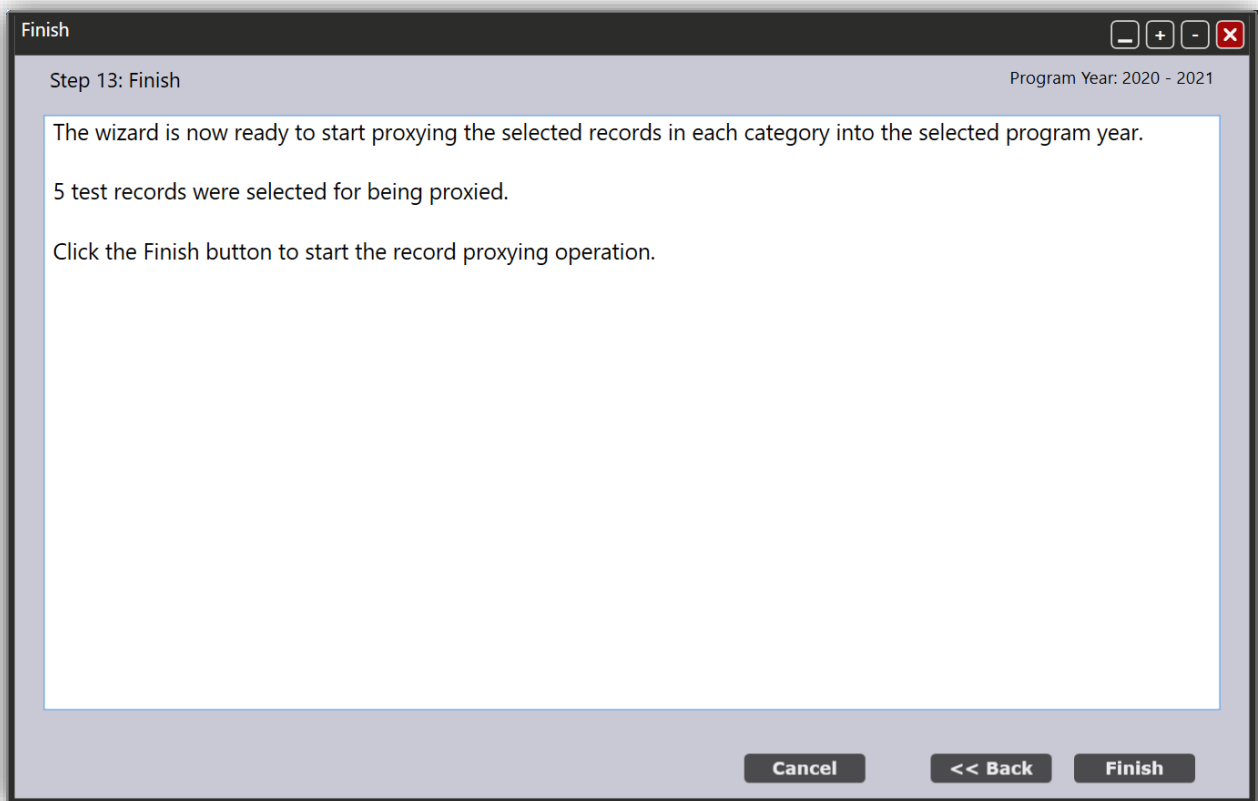
Workforce Supplemental

- Annual Income
- Hourly Wage
- Scheduled work hours/week
- Work maturity skills
- Workforce preparation
- Provider Use Codes

Cancel **<< Back** **Next >>**

- **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.



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.

