**End of Year Data Freeze into Student Progressions**

On or near August 1 each year, the final processing for all students should be complete. This is the last time data will be extracted from the transactional data for a given academic year. The stored data in the warehouse is considered final.

**THIS MUST BE COMPLETED BEFORE THE YEAR ROLL-FORWARD.**

**Access Data**

To freeze annual Access data and populate it into the data warehouse object (Student Progressions), you must export the Program Record data and combine it with the committed college affordability data (from College Data). These have to be two separate reports, so you must combine them outside of Salesforce (using Excel or similar).

(1) Run the report [EOY Data Freeze - Access](https://na88.salesforce.com/00O1Y000006pKBq)

1. Change the filter for Access Academic Year to the current year that is ending (e.g. if it is August 2020, the Access Academic year for this report should be 2019-20)
2. Export the results to a csv file
3. Map the fields from EOY Data Freeze as follows:
   1. Student Progression: ID = Id
   2. Student Progression: Student Progression ID = do not import
   3. Access Program Record Lookup: # Admitted Schools = Access # Admitted Schools
   4. Access Program Record Lookup: # Application Forms Submitted = Access # Application Forms Submitted
   5. Access Program Record Lookup: Advisor = Access Advisor
   6. Access Program Record Lookup: College Attending = Access College Attending
   7. Access Program Record Lookup: Stage = Access EOY Status
   8. Access Site = do not import
   9. Access Program Record ID 18 = do not import
4. Add an additional field called Access Committed College Affordability
5. Add an additional field called Access Pell Amount (added August 2021)

(2) Run the report [Access EOY Affordability Report](https://na88.lightning.force.com/lightning/r/Report/00O1Y000006q0nuUAA/view?queryScope=userFolders)

1. Change the filter for Year to the current year that is ending (e.g. if it is August 2020, the Access Academic year for this report should be 2019-20)
   1. Export the results to a csv file
   2. In the column "Attending College List Record: Affordable Gap Before Loans," populate all empty cells with "No Data"
2. In the Access Data Freeze exported file (from step 1.2)
   1. Sort the file by Access Program Record ID 18
   2. Use VLOOKUP or similar to map the affordability data BY STUDENT. ProgramRecordID18 on the csv file from 2.1 corresponds to Access Program Record ID 18 from the exported file from 1.2
      1. ​​​​​​The "Attending College List Record: Affordable Gap Before Loans" field should populate the Student Progression field Access Committed College Affordability
      2. For any students with no results (e.g. "#N/A") replace with "No Data"
      3. The "Attending College List Record: Scholarship Pell" corresponds to Access Pell Amount (added August 2021)
         1. When you are completing the VLookup for Pell, you might see that blank values are returned as 0s in the vlookup. To avoid this use a formula similar to this one:
            1. **=IF(LEN(VLOOKUP(A2,the table array,2,FALSE))=0,"Specific text",VLOOKUP(A2,the table array,2,FALSE))**
            2. In this example, the table array is the sheet containing the data you need to pull in with the vlookup. "Specific text" can be "blank" or other text, but the specific text allows you to confirm that the vlookup worked successfully. the number 2 above indicates which column that the matched value is returned.
            3. Reference this site for more information: <https://www.extendoffice.com/documents/excel/2447-excel-vlookup-blank-instead-of-0-n-a.html>
3. Save the Access Data Freeze file
4. Update the Student Progressions object with this file

NOTE THAT'S NEW FOR FY21 - Need to add a process that captures Pell eligibility. As of this update (11/11/2020) that is captured individually on college list records, but is an important reporting component. Added August 2021. See step 1.5 and step 2.2 above.

**Success Update**

To freeze the Success End of Year data, you will run 4 reports - one overall, one for data that is only kept on the program semester (academic history), one to compute the credits earned and the last one to update the On Track to Graduate field for easier reporting. There will be significant processing in Excel to get this data frozen correctly, plan several uninterrupted hours to process this data.

(1) Run the report [EOY Data Freeze - Success Overall](https://na88.salesforce.com/00O1Y000006pKCj)

1. Change the filter for Current Success Academic Year to the current year that is ending (e.g. if it is August 2020, the Current Success Academic Year for this report should be 2019-20)  
     
   **August 2021 NOTE:** If Current Success Academic Year is not set, you can use the Y# Academic Year fields (there will be 6) where the academic year = the correct year (e.g. if it is August 2021, the Y# Academic Year should be 2020 - 21). For this year (August 2021) I am running a separate report on Student Progressions Where Y1-Y6 Academic Year fields = 2020 - 21 and updating the "Current Success Academic Year" to 2020 - 21. Alternatively, can use a Student Progressions with Success Program Record Lookup report and use Success Program Record Lookup: Current Academic Year = 2020 - 21. This means that the report above can be used by just updating Current Success Academic Year. --DF
   1. Export the results to a csv file
   2. The list of columns below shows the column: original header = new header. Update all headers as indicated, unless the field shows "= do not import". Anything in italics is used in processing the file and preparing for data upload. The example formulas throughout this document refer to the fields in the columns below - when you download the file, check it to make sure the columns have not been rearranged!! if they have been, all formula examples will break!!
      * Col A: Student Progression: ID = Id
      * *Col B: Student Progression: Student Progression ID = do not import*
      * Col C: Success Program Record Lookup: Degree  Pathway = Success Degree Pathway
      * Col D: Success Program Record Lookup: College Credits to Graduate = Success Credits Required to Graduate
      * Col E: Success Program Record Lookup: Stage = Success Final or Most Recent Status
      * Col F: Success Program Record Lookup: Current Academic Year = Last or Most Recent Success Acad Year
      * *Col G: Success Program Record Lookup: Current Academic Term = do not import*
      * Col H: Success Program Record Lookup: Advisor = Last or Most Recent Advisor
      * *Col I: Success Program Record Lookup: # Spring In Person Interactions Success = do not import*
      * *Col J: Success Program Record Lookup: # Fall In Person Interactions Success = do not import*
      * *Col K: Success Program Record Lookup: # Spring Overall Independent Interaction = do not import*
      * *Col L: Success Program Record Lookup: # Fall Overall Independent Interactions = do not import*
      * Col M: Success Program Record Lookup: Cumulative College GPA = Last or Most Recent College GPA
      * *Col N: Success Y1 Academic Year = do not import*
      * *Col O: Success Y2 Academic Year = do not import*
      * *Col P: Success Y3 Academic Year = do not import*
      * *Col Q: Success Y4 Academic Year = do not import*
      * *Col R: Success Y5 Academic Year = do not import*
      * *Col S: Success Y6 Academic Year = do not import*
      * Col T: Success Program Record Lookup: Current Loan Total = Last or Most Recent Loan Total\*\*\*\*\*\*\***Should this be from Total\_Loans\_\_c on the Academic History Record for Spring? As of the 2020 - 21 academic year, this field is no longer used. Set to "do not import" and update in Spring Section below.**
      * Col U: Success Program Record Lookup: Program College Year = Last or Most Recent Year in BL Program
   3. Add a column to the end with the header Last/Most Recent #Independent Interact.
      * Add Spring and Fall Independent Interactions to get the year total
        + Formula example:   =K2+L2
      * Add a column to the end with the header Last/Most Recent #In Person Interactions (**As of 2020-21 we are not separately tracking In Person interactions--change to "do not import"--DF)**
        + Add Spring In Person and Fall In Person Interactions to get the year total
        + Formula example:   =I2+J2
      * The next set of instructions assumes columns N - S contain the fields Success Y1 Academic Year - Success Y6 Academic Year. Use these fields to determine which Success Y# field year to update. You are essentially saying "if the current academic year = the value in the student's Y1 (Y2...Y6) academic year, populate the field in question, otherwise leave it empty."
        + Academic Year Advisor
          1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 Advisor / Formula example:   =IF(N2=$F2,$H2,"")

Column header: Success Y2 Advisor / Formula example:   =IF(O2=$F2,$H2,"")

Column header: Success Y3 Advisor / Formula example:   =IF(P2=$F2,$H2,"")

Column header: Success Y4 Advisor / Formula example:   =IF(Q2=$F2,$H2,"")

Column header: Success Y5 Advisor / Formula example:   =IF(R2=$F2,$H2,"")

Column header: Success Y6 Advisor / Formula example:   =IF(S2=$F2,$H2,"")

Copy/paste all 6 advisor columns so that you preserve the values only.

Occasionally you will not have an advisor, even though the year matches. The formulas from step 6 above will populate the field with a "0" - find/replace all of these with "No Data"

* + - * Success EOY Status
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 EOY Status / Formula example:   =IF(N2=$F2,$E2,"")

Column header: Success Y2 EOY Status / Formula example:   =IF(O2=$F2,$E2,"")

Column header: Success Y3 EOY Status / Formula example:   =IF(P2=$F2,$E2,"")

Column header: Success Y4 EOY Status / Formula example:   =IF(Q2=$F2,$E2,"")

Column header: Success Y5 EOY Status / Formula example:   =IF(R2=$F2,$E2,"")

Column header: Success Y6 EOY Status / Formula example:   =IF(S2=$F2,$E2,"")

* + - * Success Earned Bachelors This Year (this is similar to the Success Graduated Year, but is year-by-year)
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 Earned Bachelors This Year / Formula example:   =IF(N2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y2 Earned Bachelors This Year / Formula example:   =IF(O2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y3 Earned Bachelors This Year / Formula example:   =IF(P2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y4 Earned Bachelors This Year / Formula example:   =IF(Q2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y5 Earned Bachelors This Year / Formula example:   =IF(R2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y6 Earned Bachelors This Year / Formula example:   =IF(S2=$F2,IF($E2="Graduated","Yes","No"),"")

* + - * Success Final Year in BL (this is similar to the Success Graduated Year, but is year-by-year). NOTE the different formula for Y6 - it is ALWAYS YES if the student just completed their 6th year.
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 Final Year in BL? / Formula example:   =IF(N2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y2 Final Year in BL? / Formula example:   =IF(O2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y3 Final Year in BL? / Formula example:   =IF(P2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y4 Final Year in BL? / Formula example:   =IF(Q2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y5 Final Year in BL? / Formula example:   =IF(R2=$F2,IF($E2="Graduated","Yes","No"),"")

Column header: Success Y6 Final Year in BL? / Formula example:  =IF(S2=$F2,"Yes","")

* + - * Success EOY GPA
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 EOY GPA / Formula example:  =IF(N2=$F2,$M2,"")

Column header: Success Y2 EOY GPA / Formula example:   =IF(O2=$F2,$M2,"")

Column header: Success Y3 EOY GPA / Formula example:   =IF(P2=$F2,$M2,"")

Column header: Success Y4 EOY GPA / Formula example:   =IF(Q2=$F2,$M2,"")

Column header: Success Y5 EOY GPA / Formula example:   =IF(R2=$F2,$M2,"")

Column header: Success Y6 EOY GPA / Formula example:  =IF(S2=$F2,$M2,"")

* + - * 1. **August 2021 note, there are a handful of blank GPAs. In this case, the formula as it stands =IF(N2=$F2,$M2,"") will actually bring over a 0 where the field is blank. Need to update the formulas to check first if M2 is null. So something like this formula: =IF(N2=$F2,IF(ISBLANK($M2),"",$M2),"")**
      * Success # Independent Interactions (year by year)
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 # Independent Interactions / Formula example:  =IF(N2=$F2,$K2+$L2,"")

Column header: Success Y2 # Independent Interactions / Formula example:   =IF(O2=$F2,$K2+$L2,"")

Column header: Success Y3 # Independent Interactions / Formula example:   =IF(P2=$F2,$K2+$L2,"")

Column header: Success Y4 # Independent Interactions / Formula example:   =IF(Q2=$F2,$K2+$L2,"")

Column header: Success Y5 # Independent Interactions / Formula example:   =IF(R2=$F2,$K2+$L2,"")

Column header: Success Y6 # Independent Interactions / Formula example:  =IF(S2=$F2,$K2+$L2,"")

* + - * Success # In Person Interactions **August 2021 Note: as of 2020-21 we are not tracking in person interactions. Omit this step.**
        1. Add six columns (6) to the end of the spreadsheet as follows:

Column header: Success Y1 # In Person Interactions / Formula example:  =IF(N2=$F2,$I2+$J2,"")

Column header: Success Y2 # In Person Interactions / Formula example:   =IF(O2=$F2,$I2+$J2,"")

Column header: Success Y3 # In Person Interactions / Formula example:   =IF(P2=$F2,$I2+$J2,"")

Column header: Success Y4 # In Person Interactions / Formula example:   =IF(Q2=$F2,$I2+$J2,"")

Column header: Success Y5 # In Person Interactions / Formula example:   =IF(R2=$F2,$I2+$J2,"")

Column header: Success Y6 # In Person Interactions / Formula example:  =IF(S2=$F2,$I2+$J2,"")

* + - Copy and paste all new fields so that you preserve values only (make it safe to delete fields without breaking formulas)
    - Delete or do not import all of the fields that are in italics in step 3
    - Make sure you still have data in your new columns created in step 9
    - Use dataloader or dataloader.io to update the Student Progression records (using the ID in the first column of the spreadsheet)

(2) Run the report [EOY Data Freeze - Success Spring Term](https://na88.lightning.force.com/lightning/r/Report/00O1Y000006S1bVUAS/view)

1. Change the filter for Current Success Academic Year to the current year that is ending (e.g. if it is August 2020, the Current Success Academic Year year for this report should be 2019-20)
2. Export the results to a csv file
3. Sort by Col B (Success Program Record Lookup: Program College Year)
4. Split into 6 files based on Col B. One file for each Program College Year. All rows containing "Year 1" in col B go into one file; all rows containing "Year 2" go into a separate file, and so on. It is possible to do this with formulas in a single file but far easier to split into separate files.

For each of the 6 new files you created in step 2.4 above:

1. Process the file in Excel as follows
   1. Rename column A (Student Progression ID) to **Id**
   2. *Do not import column B: Success Program Record Lookup: Program College Year*
   3. Rename column C (Success Program Record Lookup: Current Spring Lookup: Semester Credits Attempted) to "Success Y# Spring Credits Attempted" (where # is the year number you are currently processing and would be 1 through 6)
   4. Rename column D (Success Program Record Lookup: Current Spring Lookup: Semester Credits Earned) to "Success Y# Spring Credits Earned"
   5. Rename column E (Success Program Record Lookup: Current Spring Lookup: Semester College: Organization Name) to "Success Y# Spring College Attending"
   6. Rename column F (Success Program Record Lookup: Stage) to "Success Y# EOY Status"
   7. Rename column G (Success Program Record Lookup: Current Program Year: Total Grants) to "Success Y# Total Grants" **DO NOT IMPORT. NO LONGER TRACKING AS OF 2020-21 ACADEMIC YEAR**
   8. Rename column H (Success Program Record Lookup: Current Program Year: Total Loans) to "Success Y# Total Loans" **DO NOT IMPORT. NO LONGER TRACKING LOAN DATA YEAR OVER YEAR AS OF 2020-21 ACADEMIC YEAR**
   9. Rename column I (Success Program Record Lookup: Current Program Year: Total Balance) to "Success Y# Total Balance" **DO NOT IMPORT. NO LONGER TRACKING AS OF 2020-21 ACADEMIC YEAR**
   10. *Do not import column J (Success Program Record Lookup: Current Fall Lookup: Semester Credits Attempted) - this is used to compute total credits attempted this year*
   11. Rename column K (Success Program Record Lookup: Percent Emp. Milestones Complete Overall) to "Success Y# % Empl Milestone Completed"
       1. **Technical Note: The field API Name remains the same but this formula was updated in August 2021 to reflect the new way of tracking Employability Milestones and including Career Relevant Experiences. See documentation in** [Salesforce Change Log](https://tbl500amory.sharepoint.com/sites/NationalDataTeamDocumentation/_layouts/15/Doc.aspx?sourcedoc=%7bb3357a84-dc7c-4998-a759-a63ccfa7f0c5%7d&action=edit&wd=target%28Untitled%20Section.one%7c75506A0E-54FB-4588-984B-EBAD9FC2E7D5/Salesforce%20Change%20Log%7c8130909f-9394-4d0c-ab9a-591ac5f14265/%29)
   12. Rename column L (Success Program Record Lookup: Current Spring Lookup: Cumulative Credits **Earned**) to "Last/Most Recent Cumul. Credits Earned"
       1. **August 2021 Note:** This step had a typo and was using Success Program Record Lookup: Current Spring Lookup: Cumulative Credits **Attempted**to fill the Last/Most Recent Cumul. Credits **Earned** field. The report linked above also used the Cumulative Credits Attempted field rather than Cumulative Credits Earned field. I corrected both the documentation and the report 8/23/2021--DF.
   13. Add new column named "Success Y# Credits Attempted". Formula:  =J2+C2​​​​​​​
   14. COPY all data from column E and paste it into a new column - you are duplicating this column. Name this column "Last or Most Recent College Attended"
   15. **NEW AS OF 2020-21 ACADEMIC YEAR. Rename Column O Success Program Record Lookup: Current Spring Lookup: Total Loans to "Last or Most Recent Loan Total"**
   16. *Do not import Success Program Record Lookup: Total Completed Emp Milestones*
   17. *Do not import Success Program Record Lookup: Current Spring Lookup: Cumulative Credits Attempted*
2. Use dataloader.io to update Student Progression.