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

On or near October 15 each year, the final cohort of Access students, Success first years, and overall Success students served should be finalized. This data is stored in the data warehouse to aid in providing static denominators for development and program to monitor.

**Access Class Information**

To freeze the official numbers for Access Students Served, you must first create the new Student Progression records for the Access students and populate it with some basic bio/demographic data.

1. Run the report [DW - Oct - Access Initial Population](https://na88.salesforce.com/00O1Y000006pNxx)
2. Change the filter for Program Year to the current year that is underway (e.g. if it is October 2020, the Program year is 2020 - 21)
3. Export the results to a csv file
4. The list of columns below shows the column: original header = new header. Update all headers as indicated, unless the field shows "= do not import".
   * + Col A: ContactID18
       - * COPY this column so that you have 2 identical columns containing the contact ID
         * Rename the first column (column A) to "Contact ID"
         * Rename the second column (now column B) to "Contact Lookup"
     + Col C: ProgramRecordID18 = Access Program Record Lookup
     + Col D: Stage = do not import
     + Col E: High School Graduation Year = High School Graduation Year
     + Col F: High School = High School
     + Col G: Program Site = Access Program Site
     + Col H: Program Year = Access Academic Year
     + Col I: Advisor = Access Advisor
     + Col J: Partner Program Involvement = Partner Affiliation
     + Col K: College Bound Status = College Bound Status
     + Col L: Confirmed Family Income at Intake = Confirmed Family Income at Intake
     + Col M: Gender Identity = Gender Identity
     + Col N: Race = Race
     + Col O: Sex = Sex
     + Col P: SPINE Student? = do not import (used to create Region Specific Designator)
     + Col Q: MCPSA = do not import (used to create Region Specific Designator)
     + Col R: Tbf Cci = do not import (used to create Region Specific Designator)
     + Col S: Fee for Service Partner = Fee for Service Partner
     + Col T: Create new column. Header: "Region Specific Designator"
       - * This is a multi-select picklist. Each separate item is separated by a semicolon (;).
         * If Col P contains a 1, Region Specific Designator should contain "SPINE Student"
         * If Col Q contains a 1, Region Specific Designator should contain "MCPSA"
         * If Col R contains a 1, Region Specific Designator should contain "TBF/CCI"
         * If the student has a 1 in more than one column, the text should be concatenated with a ; separator. For example: "SPINE Student;MCPSA" or "MCPSA;TBF/CCI"
5. Insert the rows into the Student Progressions object.

**Success First Year Information**

To freeze the official numbers for Success Students Served and Success First Years (setting up a cohort of students that is used extensively for outcomes reporting), you must first create the new Student Progression records for the SD students and populate it with some basic bio/demographic data, or update the A2S student records.

1. Run the report [DW - Oct - Success Initial Population](https://na88.salesforce.com/00O1Y000006pNzy)
2. Change the filter for Program Year to the current year that is underway (e.g. if it is October 2020, the Program year is 2020 - 21)
3. Export the results to a csv file
4. The list of columns below shows the column: original header = new header. Update all headers as indicated, unless the field shows "= do not import".
   * + Col A: ContactID18
       - * COPY this column so that you have 2 identical columns containing the contact ID
         * Rename the first column (column A) to "Contact ID"
         * Rename the second column (now column B) to "Contact Lookup"
     + Col C: ProgramRecordID18 = Success Program Record Lookup
     + Col D: Stage = **Success Y1 SOY Status** (addition as of 2021-22 Academic Year; formerly was "do not import")
     + Col E: High School Graduation Year = High School Graduation Year
     + Col F: High School = High School
     + Col G: Program Site = Success Program Site
     + Col H: Program Year = Success Cohort
     + Col I: Advisor = Success Y1 Advisor
     + Col J: Partner Program Involvement = Partner Affiliation
     + Col K: College Bound Status = College Bound Status
     + Col L: Confirmed Family Income at Intake = Confirmed Family Income at Intake
     + Col M: Gender Identity = Gender Identity
     + Col N: Race = Race
     + Col O: Sex = Sex
     + Col P: SPINE Student? = do not import (used to create Region Specific Designator)
     + Col Q: MCPSA = do not import (used to create Region Specific Designator)
     + Col R: Tbf Cci = do not import (used to create Region Specific Designator)
     + Col S: Fee for Service Partner = Fee for Service Partner
     + Col T: Special Initiatives = Success Special Initiatives
     + Col U: College Credits to Graduate = Success Credits Required to Graduate
     + Col V: Create new column. Header: "Region Specific Designator"
       - * This is a multi-select picklist. Each separate item is separated by a semicolon (;).
         * If Col P contains a 1, Region Specific Designator should contain "SPINE Student"
         * If Col Q contains a 1, Region Specific Designator should contain "MCPSA"
         * If Col R contains a 1, Region Specific Designator should contain "TBF/CCI"
         * If the student has a 1 in more than one column, the text should be concatenated with a ; separator. For example: "SPINE Student;MCPSA" or "MCPSA;TBF/CCI"
5. UPSERT the rows into the Student Progressions object using Contact ID as the key. Dataloader.io will call this the "external ID"

**Success All Students Update for This Academic Year**

Capture the annual information for all students served by the Success program this year. In October, this information is relatively lightweight but establishes groundwork for future updates. This file requires careful attention to the order of the fields so that recommended formulas work.

1. Run the report [DW - Oct - Success Year](https://na88.salesforce.com/00O1Y000006pNy2)
2. Change the filter for Program Year to the current year that is underway (e.g. if it is October 2020, the Program year is 2020 - 21)
3. Export the results to a csv file
4. Sort by Col D: Year (this will make processing easier)
5. The list of columns below shows the column: original header = new header. Update all headers as indicated, unless the field shows "= do not import".
   * + Col A: Contact ID for reporting = Id
     + Col B: Program Year: ID = do not import (used to populate year by year lookup fields)
     + Col C: Academic Year = do not import (used to populate year by year academic year fields)
     + Col D: Year = do not import (used to drive formulas for annual data population)
     + Col E: Program Record: Advisor = do not import (used to populate year by year advisor fields)
     + Col F: School (Fall) = do not import (used to populate year by year fall college attended fields)
     + Col G: Program Record: Stage = do not import (used to populate Y# SOY [Start of Year] Status fields) --**ADDED OCTOBER 2021 FOR 2021-22 ACADEMIC YEAR**
     + CREATE NEW COLUMNS AS FOLLOWS
       - * Col H: Success Program Year 1 Lookup - set to Col B if Year = "Year 1", empty otherwise

=IF($D2="Year 1",$B2,"")

* + - * + Col I: Success Y1 Academic Year - set to Col C if Year = "Year 1", empty otherwise

=IF($D2="Year 1",$C2,"")

* + - * + Col J: Success Y1 Advisor - set to Col E if Year = "Year 1", empty otherwise

=IF($D2="Year 1",$E2,"")

* + - * + Col K: Success Y1 Fall College Attending - set to Col F if Year = "Year 1", empty otherwise

=IF($D2="Year 1",$F2,"")

* + - * + **Col L**:  **Success Y1 SOY Status - set to Col G if Year = "Year 1", empty otherwise**

=IF($D2="Year 1",$G2,"")

* + - * Proceed to Year 2 Fields
        + ***Col M***: Success Program Year 2 Lookup - set to Col B if Year = "Year 2", empty otherwise

=IF($D2="Year 2",$B2,"")

* + - * + Col ***N***: Success Y2 Academic Year - set to Col C if Year = "Year 2", empty otherwise

=IF($D2="Year 2",$C2,"")

* + - * + Col ***O***: Success Y2 Advisor - set to Col E if Year = "Year 2", empty otherwise

=IF($D2="Year 2",$E2,"")

* + - * + Col ***P***: Success Y2 Fall College Attending - set to Col F if Year = "Year 2", empty otherwise

=IF($D2="Year 2",$F2,"")

* + - * + **Col Q**: **Success Y2 SOY Status - set to Col G if Year = "Year 2", empty otherwise**

=IF($D2="Year 2",$G2,"")

* + - * Proceed to Year 3 Fields
        + Col ***R***: Success Program Year 3 Lookup - set to Col B if Year = "Year 3", empty otherwise

=IF($D2="Year 3",$B2,"")

* + - * + Col ***S***: Success Y3 Academic Year - set to Col C if Year = "Year 3", empty otherwise

=IF($D2="Year 3",$C2,"")

* + - * + Col ***T***: Success Y3 Advisor - set to Col E if Year = "Year 3", empty otherwise

=IF($D2="Year 3",$E2,"")

* + - * + Col ***U***: Success Y3 Fall College Attending - set to Col F if Year = "Year 3", empty otherwise

=IF($D2="Year 3",$F2,"")

* + - * + **Col V**: **Success Y3 SOY Status - set to Col G if Year = "Year 3", empty otherwise**

=IF($D2="Year 3",$G2,"")

* + - * Proceed to Year 4 Fields
        + Col ***W***: Success Program Year 4 Lookup - set to Col B if Year = "Year 4", empty otherwise

=IF($D2="Year 4",$B2,"")

* + - * + Col ***X***: Success Y4 Academic Year - set to Col C if Year = "Year 4", empty otherwise

=IF($D2="Year 4",$C2,"")

* + - * + Col ***Y***: Success Y4 Advisor - set to Col E if Year = "Year 4", empty otherwise

=IF($D2="Year 4",$E2,"")

* + - * + Col ***Z***: Success Y4 Fall College Attending - set to Col F if Year = "Year 4", empty otherwise

=IF($D2="Year 4",$F2,"")

* + - * + **Col AA**: **Success Y4 SOY Status - set to Col G if Year = "Year 4", empty otherwise**

=IF($D2="Year 4",$G2,"")

* + - * Proceed to Year 5 Fields
        + Col ***AB***: Success Program Year 5 Lookup - set to Col B if Year = "Year 5", empty otherwise

=IF($D2="Year 5",$B2,"")

* + - * + Col ***AC***: Success Y5 Academic Year - set to Col C if Year = "Year 5", empty otherwise

=IF($D2="Year 5",$C2,"")

* + - * + Col ***AD***: Success Y5 Advisor - set to Col E if Year = "Year 5", empty otherwise

=IF($D2="Year 5",$E2,"")

* + - * + Col ***AE***: Success Y5 Fall College Attending - set to Col F if Year = "Year 5", empty otherwise

=IF($D2="Year 5",$F2,"")

* + - * + **Col AF**: **Success Y5 SOY Status - set to Col G if Year = "Year 5", empty otherwise**

=IF($D2="Year 5",$G2,"")

* + - * Proceed to Year 6 Fields
        + Col ***AG***: Success Program Year 6 Lookup - set to Col B if Year = "Year 6", empty otherwise

=IF($D2="Year 6",$B2,"")

* + - * + Col ***AH***: Success Y6 Academic Year - set to Col C if Year = "Year 6", empty otherwise

=IF($D2="Year 6",$C2,"")

* + - * + Col ***AI***: Success Y6 Advisor - set to Col E if Year = "Year 6", empty otherwise

=IF($D2="Year 6",$E2,"")

* + - * + Col ***AJ***: Success Y6 Fall College Attending - set to Col F if Year = "Year 6", empty otherwise

=IF($D2="Year 6",$F2,"")

* + - * + **Col AK**: **Success Y6 SOY Status - set to Col G if Year = "Year 6", empty otherwise**

=IF($D2="Year 6",$G2,"")

1. Find and replace all advisor and school records that have "0" (zero) as the only thing in the cell. The formulas will print a 0 if no data is found, and this should be cleaned up.
2. Update Student Progression records using Contact ID (col A) as the match. (Lookup via Contact ID).

**Success Update Fall Credits Attempted**

The semester credits attempted are stored on the Academic History record, meaning that a final separate report is required to finish populating all necessary data.

1. Run the report [DW - Oct - Semester Credits](https://na88.salesforce.com/00O1Y000006pO0I)
2. Change the filter for Program Year to the current year that is underway (e.g. if it is October 2020, the Program year is 2020 - 21) and the current term (e.g. because this is specifically for start-of-year population, ensure Session or Term = Fall Term)
3. Export the results to a csv file
4. Sort by Col C: Program Record: Program College Year (this will make processing easier)
5. The list of columns below shows the column: original header = new header. Update all headers as indicated, unless the field shows "= do not import".
   * + Col A: Student: ContactID18 = Id
     + Col B: Academic History Name = do not import
     + Col C: Program Record: Program College Year = do not import (used to populate year by year lookup fields)
     + Col D: Semester Credits Attempted = do not import (used to populate year by year credit fields)
     + CREATE NEW COLUMNS AS FOLLOWS
       - * Col E: Success Y1 Fall Credits Attempted

​​​​​​​​​​​​​​=IF($C2="Year 1",D2,"")

* + - * + Col F: Success Y2 Fall Credits Attempted

=IF($C2="Year 2",D2,"")

* + - * + Col G: Success Y3 Fall Credits Attempted

=IF($C2="Year 3",D2,"")

* + - * + Col H: Success Y4 Fall Credits Attempted

=IF($C2="Year 4",D2,"")

* + - * + Col I: Success Y5 Fall Credits Attempted

=IF($C2="Year 5",D2,"")

* + - * + Col J: Success Y6 Fall Credits Attempted

=IF($C2="Year 6",D2,"")

1. Update Student Progression records using Contact ID for the match. (Lookup via Contact ID).

Note for Jenn to update soon: Set MCPSA population. Use [this report](https://na88.lightning.force.com/lightning/r/Report/00O1Y000006kb3JUAQ/view?queryScope=userFolders) to identify students once in a cohort, update the Success Special Initiatives field for these students (on Student Progression object) to indicate MA Charter Schools.