Online System

ACTIVITY PACKET

TOPSpro Enterprise Basics

Scanning

CASAS Technology Support Team
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Visit Online

Download this **Activity Packet** from the **Summer Institute Presentations** web page at Home > Training and Support > National Summer Institute > Presentations

Session Description

TOPSpro Enterprise Online offers the capability of creating new records by scanning. This session introduces the process for scanning data into TOPSpro Enterprise Online. In this hands-on session, you will use the Scanning Wizard to scan Entry, Update, and Test record forms. The session covers these topics:

- *Prepare forms and Scanner settings*
- *Use Override Scanning features*
- *Scan new records using Simulated Scanning*
- *Easy fixes to Entry and Update forms*

This session is appropriate for those involved with managing data for their TOPSpro Enterprise Online account.

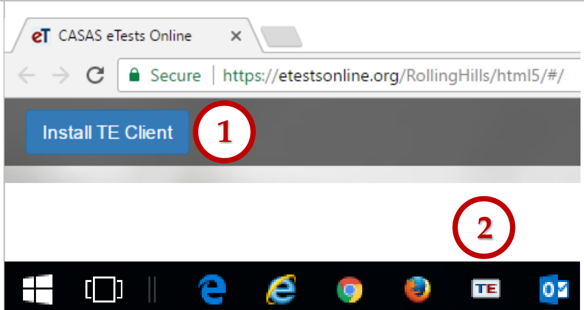
Install and Open TE Online

From Windows machines,

To access TOPSpro Enterprise Online (TE) for the first time, launch the web browser and enter the URL for the CASAS Online System your program uses.*

Server	Use any modern web browser
*Global	https://etestsonline.org/html5/#/
*California	https://ca.etestsonline.org/html5/#/
*LARAEC	https://laraec.etestsonline.org/html5/#/
*Miami Dade	https://etestsonline.org/MiamiDade/html5/#/
*Washington	https://etestsonline.org/Washington/html5/#/

❖ For Training, go to Rolling Hills Simulation – https://etestsonline.org/rollinghills/html5#/

<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>1.</td><td>


</td><td>


- Access **TE** in one of three ways, from the –
  1. **Web browser**
     - Click **Install TE Client** if first access on local machine.
  2. **Taskbar** icon
  3. **Desktop** icon
</td></tr>
<tr><td>2.</td><td>


</td><td>

- Click the **Server** field down-arrow and from the drop-down menu,
  - Select the **Server** for your online account.*
  - Enter your **Agency ID**.
  - Enter your **User** name.
  - Enter your **Password**.
- Click **Connect**.
</td></tr>
</table>

Scanning Data using TOPSpro Enterprise Online

Scanning is a commonly used method for entering data into TOPSpro Enterprise (TE) Online using an optical mark reader (OMR), or scanner. For a list of OMR compatible scanners, visit the CASAS website at Home > Product Overviews > Software > TOPSpro Enterprise.

There are eight answer sheets for use with TE. These answer sheets provide agencies with options for gathering demographic, testing, program, and accountability information. Answer sheets also simplify the process of capturing new data required by many federal reporting requirements. A list of answer sheets used with the type of data you plan to bring in to TE can be found on the CASAS website at: Home > Product Overviews > Software > TOPSpro Enterprise > Answer Sheets and Test Records.

A set of simulated scanning files is available from the CASAS website at: Home > TOPSpro Enterprise Help > TE Hands on Training > SimScan Files to learning the features of scanning in a "controlled" environment. This will ensure that you follow the same steps and learn these concepts as they relate to TE without concern for any specific features of your own agency's scanner.

Prepare Records for Scanning

Before bringing any new data into TE through scanning, it is recommended that you prepare the answer sheets and test records to minimize errors when scanning.

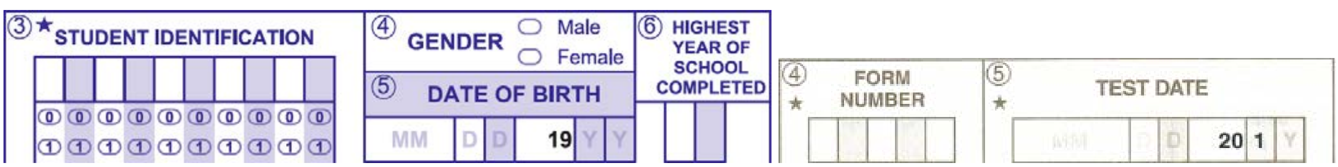
Students are given specific directions for marking answers.

Directions for marking answers		Right	Wrong
• Use No. 2 pencil only	• Make dark marks that fill oval completely	0 ● 2 3	0 1 2 3
• Do NOT use ink or ballpoint pen	• Erase cleanly any answers you change		0 1 2 3

To prepare for scanning, visually inspect answer sheets and test records for quality of marks. This will ensure that all bubbled information reads correct when scanned.

- Fill in marks that do not fill the oval completely.
- Darken marks that may be too light for the scanner to read properly.
- Erase errant marks and answers that were not erased cleanly.

Take note of **ID** and **Date** fields for accuracy.

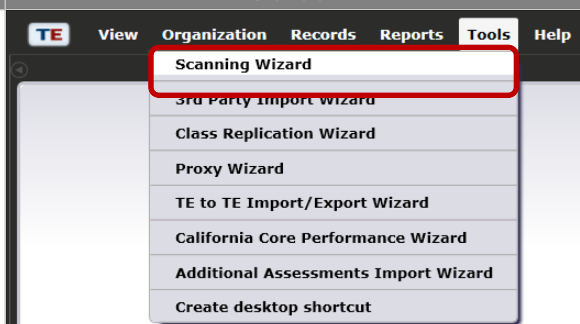
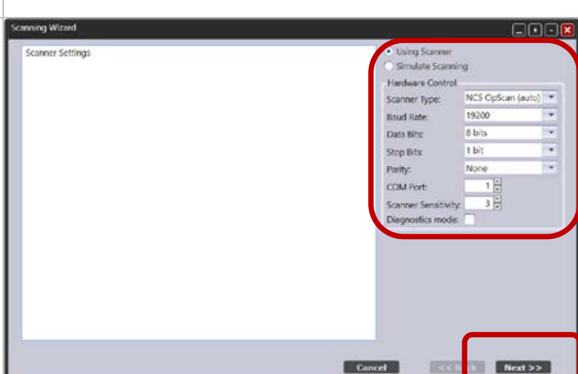


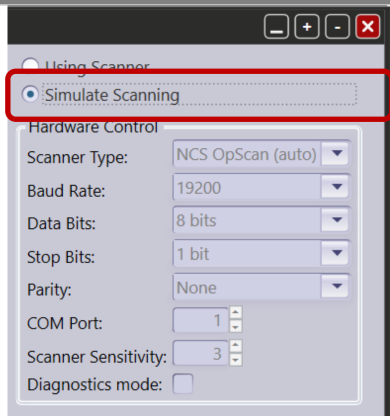
- Knowing the format of an ID assigned to your students, make sure entries in the **Student Identification** field match with that format.
- The **Date of Birth** field requires leading zeros for month and day, if single digits.
- The **Highest Year of School** field also requires a leading zero if the number of years is a single digit.
- Use scanning overrides for **Class ID**, **Program Entry Date**, test **Form Number** and **Test Date** when possible (recommended).

Even though you may be diligent with preparing forms to scan, you will have the opportunity to edit any scanned information due to scanning errors prior to importing the data.

Steps to Scan Records

The Scanning Wizard will step you through the process for importing records through the scanning process. The process is essentially the same for each type of record however; it is important to take note of subtle differences for how you allow specific imports to populate your online account.

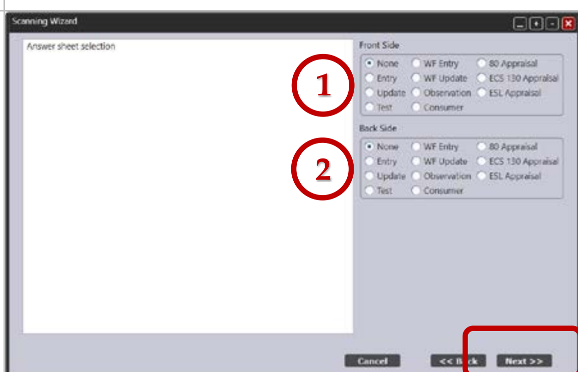
Step	Screen	Description
1.		• From the **Menu bar** at top, o Click **Tools**. o Click **Scanning Wizard.**
2.		• The **Scanning Wizard** opens with two choices for how you want to proceed. 1. Run a **New scanning session**. 2. **Return to a previous scanning session** to continue with data correction or with the import operation of the scanned records.
3.	 *Note!* For scanner installation, refer to the instructions that came with the scanner. You may also contact Scantron or CASAS Tech Support for assistance.	• On the **Scanner Settings** window, it is necessary to ensure scanner settings are correct for the type of **Scanner** your program uses before scanning any new data into TE. • **Scanner Settings** will change depending on the **Scanner Type** selected. • To begin the scanning process, o Click **Next.**

<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>4.</td><td>
</td><td>

Note! For training purposes,

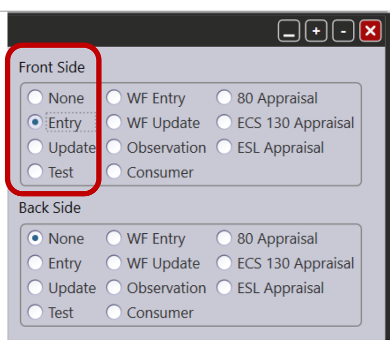
Select Simulate Scanning.

This disables Hardware Control settings so that TE looks for a scanning file instead of an actual scanner.
Use this setting when training on the <u>Simulation Server</u> using <u>SimScan Files</u>.

Click Next.
</td></tr>
<tr><td>5.</td><td>
</td><td>

On the Answer Sheet Selection window,
Identify the type of record(s) you are scanning.

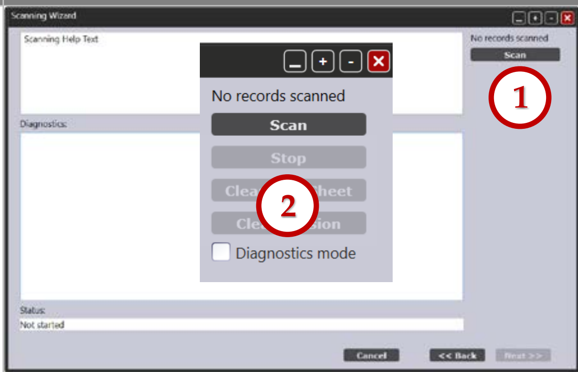
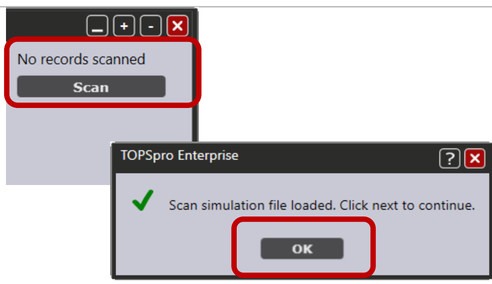
For single-sided OMR scanners,
Select a Front Side option only.
For dual-sided OMR scanners,
Select Front Side and Back Side options.

Click Next.
</td></tr>
<tr><td>6.</td><td>
</td><td>

Note! For simulated scanning,

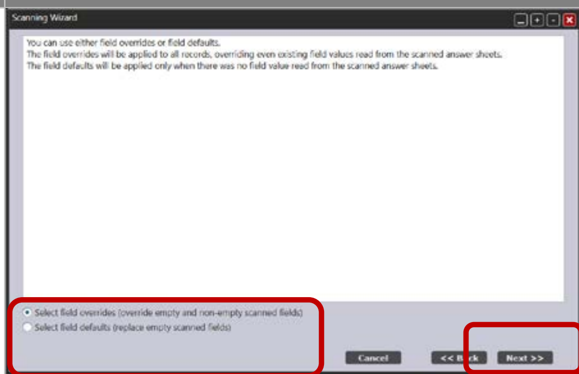
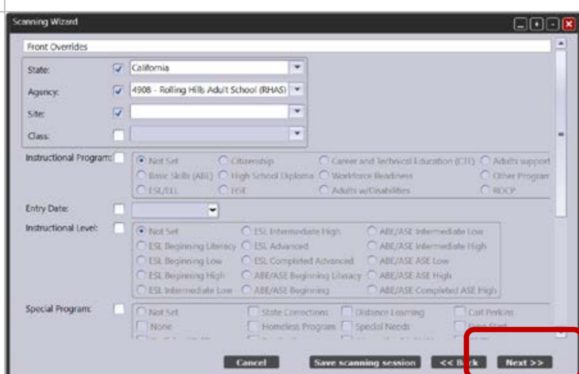
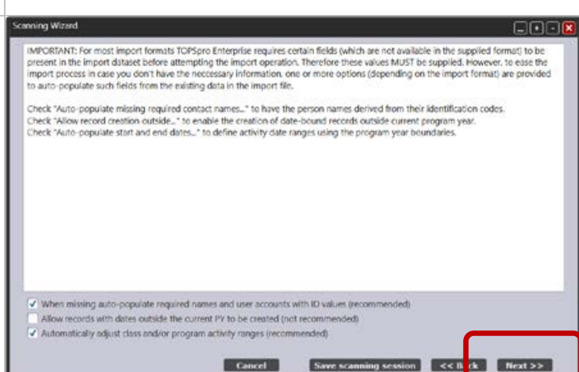
Use Front Side for training with <u>SimScan Files</u>.
Select Entry, Update, or Test.
Leave selection to None for Back Side.

</td></tr>
</table>

Step	Screen	Description
7.		• The **Scanning Wizard** is ready to scan. 1. Click **Scan**. • When all records are scanned, 2. Click **Stop**.
8.		*Note!* For simulated scanning, o Click **Scan**. • Locate [SimScan Files] on the local machine. o Select **Entry**, **Test**, or **Update**. o This initiates the "scanning" part of simulated scanning. • The selected [SimScan File] will load quickly! o Click **OK**.
9.		• The total number of sheets scanned will display at top right of the **Scanning Wizard** window. o Click **Next**. • Continue with **Override Scanning Options**.

Steps to Override Scanning Options

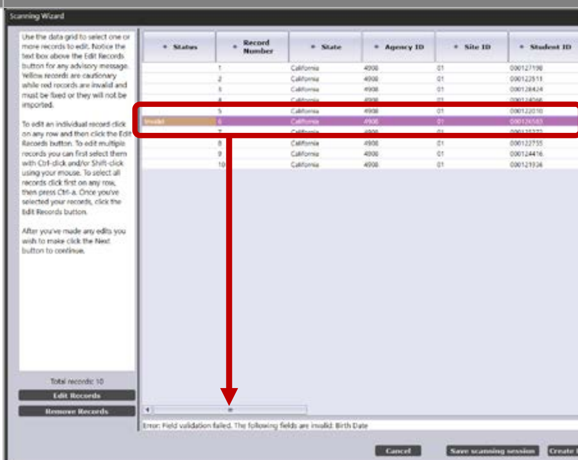
Override Scanning is a highly valuable feature in TE. Taking full advantage of this feature can save time by automatically entering an 'override' value that will replace information for that particular data field. Override options will differ depending on the type of form you are scanning.

Step	Screen	Description
1.		• After records are scanned, • Use data field **Overrides** to apply to all records in the scanned batch. • Use data field **Defaults** to apply only when a data field is empty. *Note!* For simulated scanning, keep **Select field overrides** selected. o Click **Next.**
2.		• From the **Front Overrides** window, o Use drop-down arrows next to each field to choose an **Override** value option. • A second window for **Back Overrides** will display with dual-sided scanning. • After applying **Override** values, o Click **Next**
3.		• The **Scanning Wizard** if ready to process the raw data. *IMPORTANT!* Pay close attention to information about the options and default settings on this window <u>before you proceed</u>, as they will vary based on the type of record you are scanning. • Click **Next**.

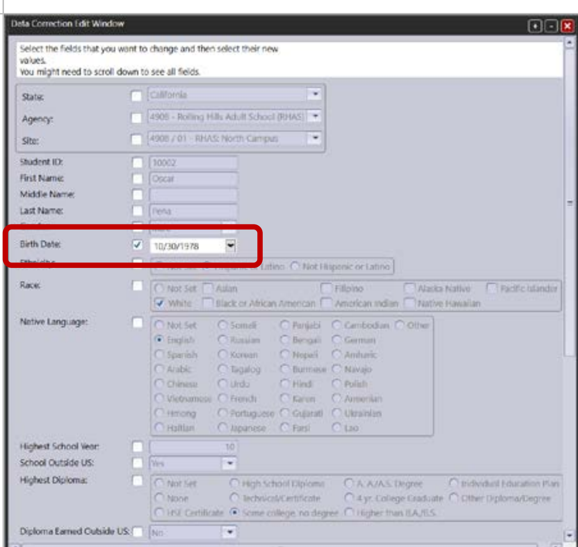
Steps to Edit Scanned Data

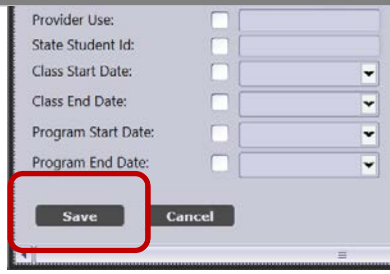
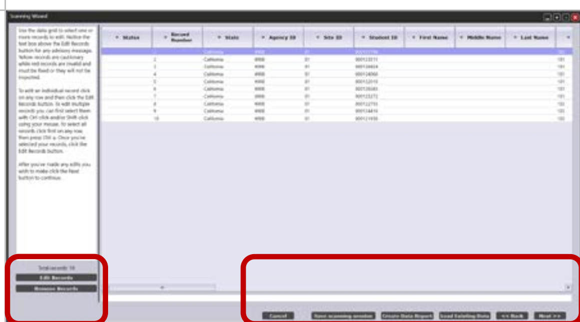
After you complete simulated or regular scanning, the Scanning Wizard preview window appears. It is recommended that you always preview what you scanned before accepting it into your database. You may also want to review your scanning information from a paper copy.

Step	Screen	Description

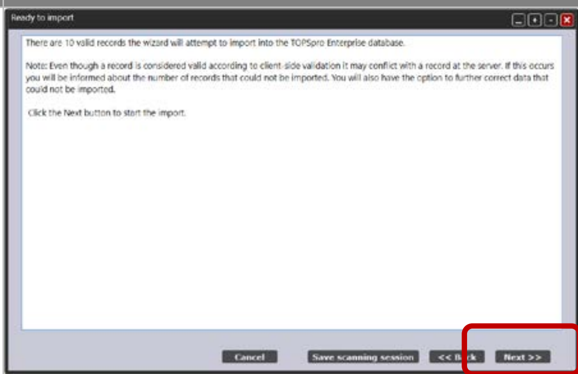
1.	
	Note! **You have the option to Save scanning session** to continue later with data correction.
		• The **Scanning Wizard** window opens with the list of scanned records.
		• The **Data Grid** at left of the list provides directions for editing records, if needed.
		  o **Yellow** records are cautionary.
		  o **Red** records are invalid.
		• Click on a **color record** to display an advisory message about the record at bottom of the list.
		• With the color record highlighted,
		  o Click **Edit Records**.
		  o Or double-click to open the **Data Correction Grid**.

2.	• **To edit multiple records**, first select them with Ctrl + click and / or Shift + click. • **To select all records**, click first on any row, then press Ctrl + a. • After selecting records, click **Edit Records**.	

3.		• The **Data Correction Edit Window** opens to,
		  o **Edit** individual records.
		  o **Apply** a global override to all records.
		  o **Correct** invalid records.
		• Check fields to change and then select their new values.
		• You may need to scroll down the grid to see all data fields.
		
		Note! Data fields will vary based on the type of records you are scanning.

Step	Screen	Description
4.		• After editing all fields as needed or necessary for the appropriate action, o Click **Save** at bottom of the grid.
5.		• When returned to the **Edit Records** window, o The list of records should be clear of any color records to indicate that all records are 'cleared' for importing into the database. • When you are ready to import the records, o Click **Next**.
6.	**Additional Button Options:** o **Remove Records –** eliminates a record from being imported. o **Cancel –** ends the import session without importing records. o **Save scanning session –** creates a file of the scan session so that you can continue later with data correction. o **Create Data Report –** will save a PDF report showing a breakdown of the records in the scan session. o **Load Existing Data** – will auto-populate existing student information. o **Back –** will take you to each previous window.	
	• Continue with **Importing Scanned Records**	

Steps to Import Scanned Records

<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>1.</td><td>

Note! You may Save [the] scanning session and continue later with the import operation of the scanned records.</td><td>The Ready to import window indicates the number of Valid records the wizard will attempt to import.
Click Next.
Note!
Even though a record is considered Valid according to your TE Client, it may conflict with a record at the CASAS server.
If this occurs, the system will inform you about the number of records that could not be imported.
You will also have the option to correct data that could not import.</td></tr>
<tr><td>2.</td><td>
</td><td>The time to import records varies depending on the type of record and number of records being imported.
You will have another opportunity to Save [the] Import Session and return later to finish.
You may also Cancel importing records. Depending on when you cancel, records may have already imported.</td></tr>
<tr><td>3.</td><td>
</td><td>The Scanning Wizard ends with a Scanning results window indicating the number of records that imported or did not import successfully.
You have the open to Save [the] scanning session so that you can continue later with data correction or with the import operation of the scanned records.
To end the scanning session,
Click Finish.</td></tr>
</table>

Quick References to Locating Scanned Information in TE

For detailed descriptions of each field, click WIOA Data Dictionary.

SCANNED ENTRY INFORMATION

Field	Description	TE Menu Navigation
1.	a. Student Name (non-scanned data)	Records -> Students -> Demographics
1.	b. Student Address (non-scanned data)	Records -> Students -> Demographics
1.	c. Email Address	Records -> Students -> Demographics
2.	Instructor Name (non-scanned data)	Organization -> Personnel -> Functional Roles
3.	Student Identification	Records -> Students -> Demographics
4.	Gender	Records -> Students -> Demographics
5.	Date of Birth	Records -> Students -> Demographics
6.	Highest Year of School Completed	Records -> Students -> Demographics
7.	Highest Diploma or Degree Earned	Records -> Students -> Demographics
8.	a. Ethnicity	Records -> Students -> Demographics
8.	b. Race	Records -> Students -> Demographics
9.	Native Language	Records -> Students -> Demographics
10.	Date of Entry into this Program	Records -> Students -> Records
11.	Instructional Program	Records -> Programs -> Enrollments
12.	Attainable Goal Within Program Year	Records -> Students -> Records
13.	Special Programs	Records -> Students -> Records
14.	Employment Barriers	Records -> Students -> In Program years
15.	Class Number	Records -> Students -> Records
16.	Personal Status	Records -> Students -> Records
17.	Labor Force Status	Records -> Students -> Records
18.	Instructional Level	Records -> Students -> Records
19.	Provider Use	Records -> Classes -> Records

Visit Online — For detailed descriptions of each field, click WIOA Data Dictionary.

SCANNED TEST INFORMATION		
Field	**Description**	**TE Menu Navigation**
1.	Student Name (non-scanned data)	Records -> Students -> Demographics
2.	Instructor Name (non-scanned data)	Organization -> Personnel -> Functional Roles
3.	Student Identification	Records -> Tests
4.	Form Number	Records -> Tests
5.	Test Date	Records -> Tests
6.	Class Number	Records -> Classes -> Records
7.	Instructional Program	Records -> Programs -> Enrollments
8.	Hours of Instruction	Records -> Classes -> Records
9.	Raw Score	Records -> Tests
10.	Test 1	Records -> Tests
11.	Test 2	Records -> Tests
12.	Test 3	Records -> Tests
13.	Test 4	Records -> Tests
Student does not yet have the skills to be tested.		Records -> Students -> Records

Visit Online For detailed descriptions of each field, click WIOA Data Dictionary.

SCANNED UPDATE INFORMATION		
Field	**Description**	**TE Menu Navigation**
1.	d. Student Name (non-scanned data)	Records -> Students -> Demographics
1.	e. Student Address (non-scanned data)	Records -> Students -> Demographics
2.	Instructor Name (non-scanned data)	Organization -> Personnel -> Functional Roles
3.	Student Identification	Records -> Classes -> Records
4.	Date of Program Update	Records -> Classes -> Records
5.	Instructional Program	Records -> Programs -> Enrollments
6.	Program Status	Records -> Programs -> Enrollments
7.	Program Progress	Records -> Programs -> Records
8.	Services Received	Records -> Programs -> Records
9.	Learner Results – Work	Records -> Students -> Records
9.	Learner Results – Education	Records -> Students -> Records
9.	Learner Results – Family / Community	Records -> Students -> Records
10.	Class Number	Records -> Classes -> Records
11.	Hours of Instruction	Records -> Classes -> Records
12.	Post Exit Leading to Postsecondary Credential	Records -> Students -> Records
13.	Instructional Level	Records -> Students -> Records
14.	Leading to Postsecondary Credential or Enrollment	Records -> Students -> Records
15.	Reason For Exiting	Records -> Programs -> Enrollments

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California Accountability:	capm@casas.org
California AEBG - Adult Ed Block Grant:	aebg@casas.org
CASAS Technology Support Team:	**techsupport@casas.org**

Training Support

Help documentation is available at CASAS Home > Training and Support >

- eTests Online Help
- TOPSpro Enterprise Help

Enroll in a complimentary workshop at: CASAS Training Registration.

Technical Support

The *CASAS* **Technology Support Team** is available to provide technical assistance for successful online implementation and uninterrupted test delivery.

- 7:00 am – 5:00 pm (Pacific Time)
- Monday – Friday
- techsupport@casas.org
- (858) 292-2900 or toll free (800) 255-1036, option 2

Thank you for attending!

CASAS National Summer Institute 2018