



Online System

ACTIVITY PACKET

TOPSpro Enterprise
Merge Wizard

CASAS Technology Support Team

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Session Description

TOPSpro Enterprise (TE) Online is a relational database that contains a collection of interrelated records, which stores information and relates records by a common element. In TE Online, that element is the student identification field. That field contains the student identification code unique to each learner that links all records related to the learner. Unique student identification codes are critical to successful tracking; therefore, it is never desirable to have two different records of the same student. In this session, you will learn how to bring together duplicate records of the same student using the Merge Wizard.

- *Merging records*
- *Entities to merge*
- *Data conflicts*
- *Merging options*

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/#/) – <https://etestsonline.org/rollinghills/html5/#/>

Step	Screen	Description
1.		<ul style="list-style-type: none"> Access TE in one of three ways, from the – <ol style="list-style-type: none"> Web browser <ul style="list-style-type: none"> Click Install TE Client if first access on local machine. Taskbar icon Desktop icon
2.		<ul style="list-style-type: none"> Click the Server field down-arrow and from the drop-down menu, <ul style="list-style-type: none"> Select the Server for your online account.* Enter your Agency ID. Enter your User name. Enter your Password. Click Connect.

Merge Wizard

The Merge Wizard is a function that brings together duplicate records of the same student at the same site. The merge process will combine the duplicate records into a single merged record. The wizard identifies any conflicting data fields between the duplicate records, which must be resolved before the merging process takes place. After records are merged, the operation cannot be undone.

Same Student with the Same ID at Different Sites

Records of the same student with the same unique ID at different sites are not duplicate records. TE tracks and records student activity per site. When reports are generated, all activity for the student across sites is combined into a single aggregated record.

Same Student with Different IDs at Different Sites

In some cases, there may be a different ID for the same student at different sites. If that happens, correct the ID at the site where it is incorrect to match with the ID at the site where it is correct.

Same Student with Different IDs in Different Program Years at the Same Site

When attempting to correct an ID, you may be met with an error that states

“A record with the same information in the key fields already exists, and duplicates are not allowed for this object type. Student ID.”

What this means is that another demographics record exists for the same student at the same site but in a prior program year. These are duplicates and you will need to merge the two records to make a correction to the ID in the current program year.

Same Student with More Than Two Different IDs at the Same Site

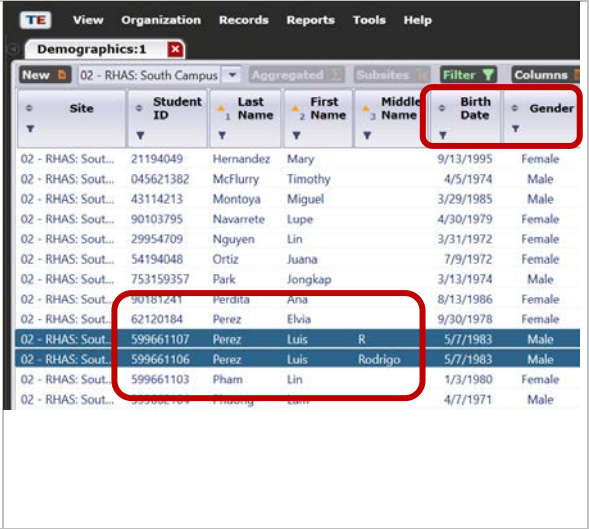
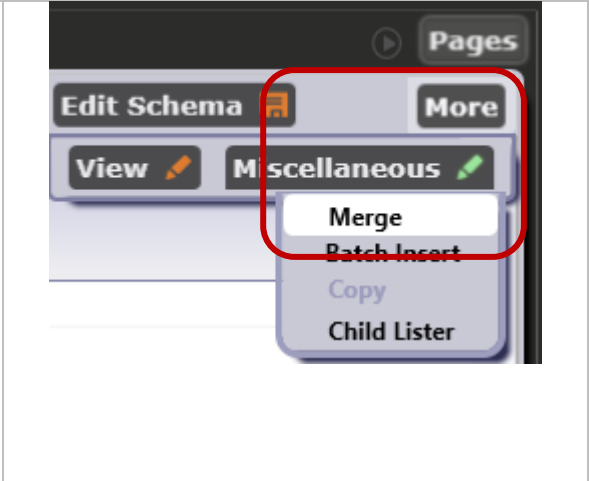
Only two duplicate records of the same student at the same site may be merged at one time. If more than two records are duplicated at the same site, such as three duplicates:

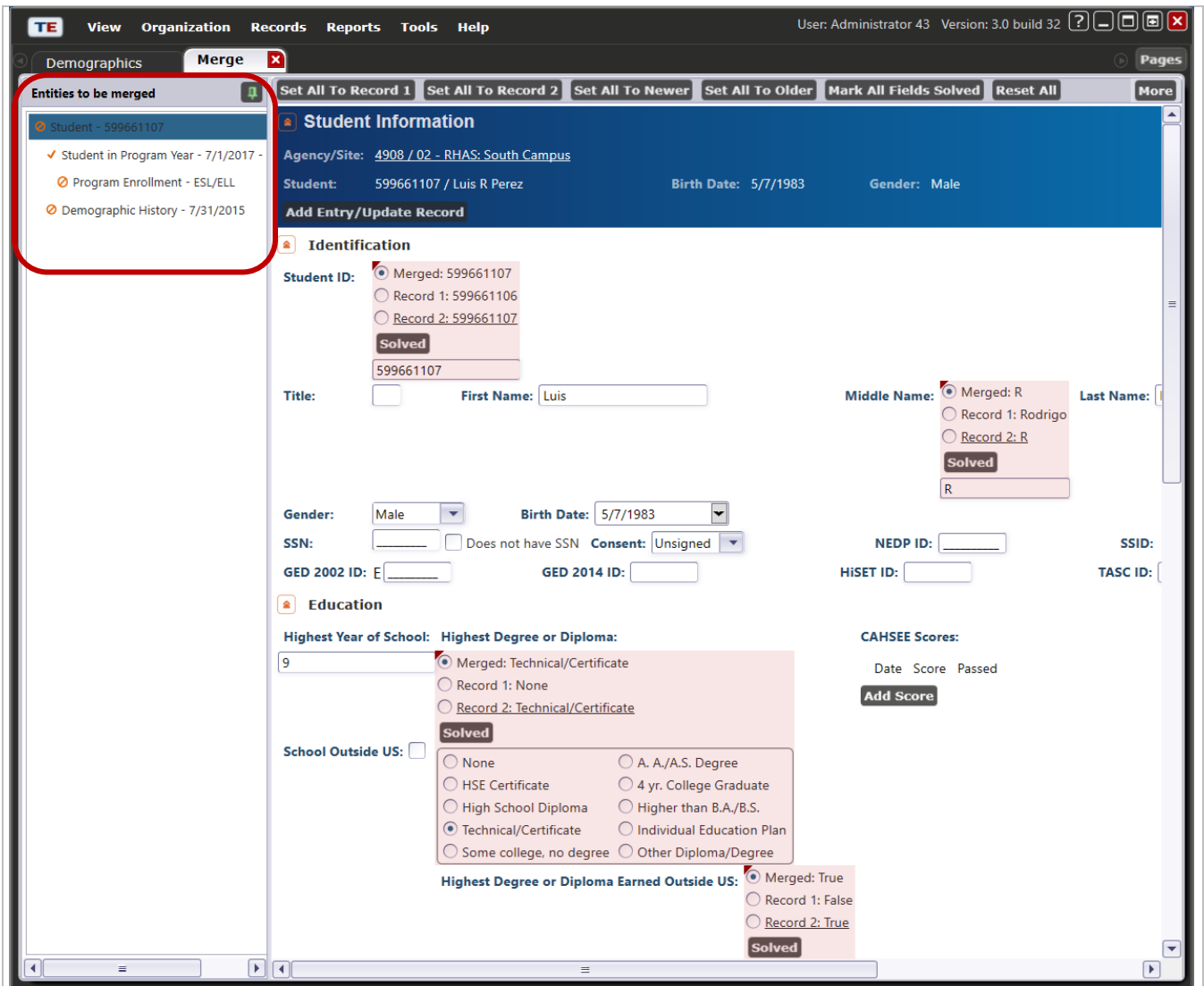
1. First – merge two of the three duplicate records so that you have one merged record.
2. Second – merge the third duplicate record with the newly merged record.

Steps to Merge Duplicate Student Records

The process for merging is the same as described in the following steps. These steps will take you through the merging process using examples for training purposes.

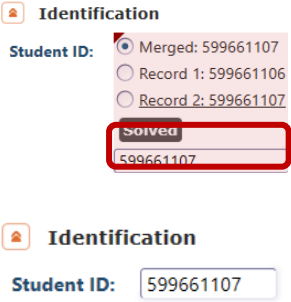
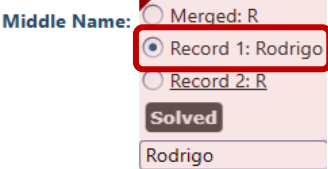
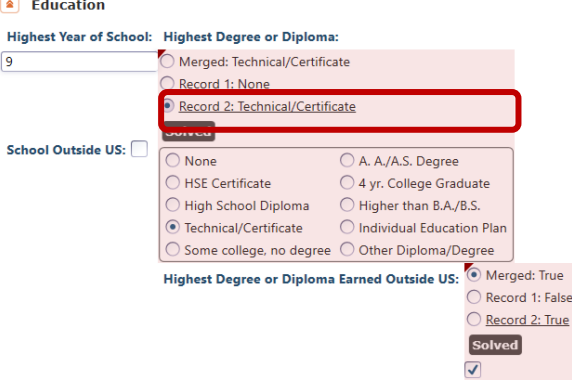
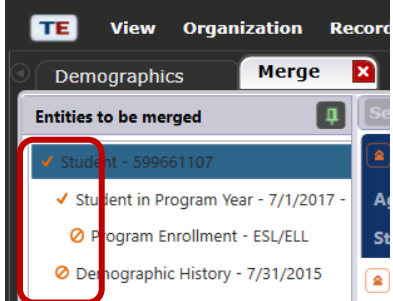
Step	Screen	Description
1.		<ul style="list-style-type: none"> From the Menu bar at top, <ul style="list-style-type: none"> Click Records. Select Students. <ul style="list-style-type: none"> Click Demographics. A tabbed page will open to the list of Demographics records in the current program year.
2.		<ul style="list-style-type: none"> Because duplicate records must be at the same site to merge – Click the Container field down-arrow from the Toolbar at top. <ul style="list-style-type: none"> Select a Site. <p><i>Tip!</i></p> <ul style="list-style-type: none"> Run the Duplicate Students report to identify duplicate records at the same site.
3.	<p>1. First, sort on Last Name.</p> <p>2. Second, sort on First Name.</p> <p>Second, sort on First Name.</p> <p>Adding Gender and DOB columns will also help with identifying duplicates.</p>	<ul style="list-style-type: none"> Suggestion: Configure and presort columns: <ol style="list-style-type: none"> Click the UP arrow in the Last Name column header. Hold down the Ctrl key on your keyboard, and then click the UP arrow in the First Name column header. Hold down the Ctrl key on your keyboard, and then click the UP arrow in the First Name column header.

Step	Screen	Description
4.		<ul style="list-style-type: none"> For duplicate records, <ul style="list-style-type: none"> Click to highlight the First record. Use the Ctrl + click key command to select a Second record. For this example, we are highlighting records for Bill and Billy for demonstration purposes.
5.		<ul style="list-style-type: none"> With two duplicate records highlighted, <ul style="list-style-type: none"> Click the More button at top right. Select Miscellaneous. Click Merge. Note! The Merge button is only available <i>after</i> selecting duplicate records.
6.	<p>IMAGE NEXT PAGE</p> <ul style="list-style-type: none"> The Merge Wizard opens in a new tab with a split screen <ul style="list-style-type: none"> At right, the Entities to be merged. <ul style="list-style-type: none"> Identifies records with conflicting data fields. At left, combined Demographics for the selected duplicated records. <ul style="list-style-type: none"> Identifies data fields highlighted pink with conflicting information that must be solved. <p>Note!</p> <ul style="list-style-type: none"> Conflicting data fields in <i>all</i> Entities to be merged must be solved before the merge process can begin. 	



The **Toolbar** at top of the **Merge Wizard** offers shortcut options to merge the two selected records.

- | | |
|-------------------------------|---|
| Set All To Record 1 | ➤ Automatically uses all of the information from the first record to create the merged record. |
| Set All To Record 2 | ➤ Automatically uses the data from the second record. |
| Set All To Newer | ➤ Automatically selects the data from the most recent record. |
| Set All To Older | ➤ Selects data from the earliest record. |
| Mark All Fields Solved | ➤ Merges the two records based on the default. |
| Reset All | ➤ Cancels your selections and re-highlights all of the conflicting fields so that you can address these issues again. |

Step	Screen	Description
7.		<ul style="list-style-type: none"> For Student ID, <ul style="list-style-type: none"> Select the 'correct' ID. Click Solved. The Student ID field now displays the solved information.
8.		<ul style="list-style-type: none"> The recommendation for solving Middle Name fields is to <ul style="list-style-type: none"> Select the <u>full Middle Name</u> for added unique identifying information about a student. Click Solved.
9.		<ul style="list-style-type: none"> For data fields where no previous information exists (i.e., None), <ul style="list-style-type: none"> Select the added information. Click Solved.
10.		<ul style="list-style-type: none"> A Check will display after solving an Entity area. Continue solving all data fields with conflicting information in each Entity area listed as you work your way down the Entity Tree.

Step	Screen	Description
11.		<p>From the Toolbar at top right,</p> <ul style="list-style-type: none"> Use Reset All if you need to start over with solving conflicts in the current Entity. Use Cancel Merge if you are unsure about any conflicts in any Entities to be merged, and need to investigate further before attempting the merge. Use Apply Merge after solving all conflicts in all Entities to be merged. <p>IMPORTANT! This operation cannot be undone!</p>
12.		
13.		<ul style="list-style-type: none"> The message at left will display when the Merge process is complete. <ul style="list-style-type: none"> Click OK.
14.		<ul style="list-style-type: none"> The Merge Wizard closes automatically and returns you to the Demographics lister. The newly merged record is highlighted in the list.

CASAS Contact Information

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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!

