

Steps to Add Class Records with Import Templates

Using the **CLS – Class Data** import template will simultaneously add **Class Definition** and **Class Instance** records to your account.

To assign **Teachers** to classes, import **Personnel Records** before importing **Class Data**. TE will automatically add and link teacher records with user records and assign teachers to classes. This is important so teachers can access classes in TE, access the [TE Teacher Portal](#), and include their names on class reports.

See [TOPSpro Enterprise Data Exchange Specifications](#) for importing from a 3rd Party System.

Step	Screen	Description
1.		<ul style="list-style-type: none"> The TE WIOA Import Templates folder is available from the CASAS website. Use the CLS – Class Data template to populate your account without manual data entry or 3rd Party Import. See TOPSpro Enterprise Data Exchange Specifications for more information about importing Class Data.
2.		<ul style="list-style-type: none"> The first sheet of an Import Template has Directions with: <ul style="list-style-type: none"> Steps to populate the import template, Steps to save the populated template as an importable file, Steps to import records, and Steps to view and confirm imported records.
3.		<ul style="list-style-type: none"> The second sheet is the fillable Template with sample data. Follow directions to populate and save the import template.

4.	<ul style="list-style-type: none">• To assign Teachers to classes,<ul style="list-style-type: none">○ Select the Personnel and User Data – PERS import file type.○ Follow the directions on each screen to import the file.
5.	<ul style="list-style-type: none">• To import Classes,<ul style="list-style-type: none">○ Select the Class Data – CLS import file type.○ Follow the directions on each screen to import the file.
6.	<ul style="list-style-type: none">• Follow directions for importing with the 3rd Party Import Wizard.• Contact techsupport@casas.org if you need help importing Data Templates.

Location of Imported Data Files in TE

1. Personnel and User Data (PERS)

Note: This import links the **Personnel Record** with a **User Account**.

- 1) TE > Organization > Personnel > **Registration**
- 2) TE > Organization > **Users**

2. Class Data (CLS)

Note: This import assigns **Teachers** to **Classes**.

- 1) TE > Organization > Classes > Definitions > **Class Instances** (from Navigator)
- 2) TE > Organization > Classes > Definitions > **Teachers** (from Navigator)
- 3) TE > Organization > Classes > **Instances** (add Instructional Program if needed)
- 4) TE > Organization > Personnel > **Functional Roles**