eTests® CASAS | TOPSpro® enterprise

Online System

ACTIVITY PACKET

Exchanging Data

The Electronic Handshake!

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Table of Contents

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

Session Description

If you use a third-party system for registration and attendance, or CASAS eTests desktop, or a state data-management system, you will want to attend this session to learn how to benefit from importing and exporting files between systems. Exchanging data with TOPSpro Enterprise Online saves time and eliminates manual data entry. In this session, you will be guided through steps to complete hands-on exercises that focus on these topics:

- *Extracting data from TOPSpro Enterprise for import to an external source*
- *Bringing records in to TOPSpro Enterprise from an external source*
- *Merging duplicate student records from exchanging data*

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

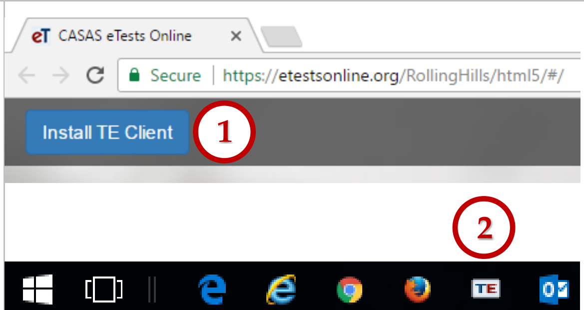
Install and Open TE Online

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#/

Step	Screen	Description
1.		 • 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
2.		• Click the **Server** field down-arrow and from the drop-down menu, o Select the **Server** for your online account.* o Enter your **Agency ID**. o Enter your **User** name. o Enter your **Password**. • Click **Connect**.

Exchanging Data with TOPSpro Enterprise Online

Exchanging Data with 3rd Party Attendance and other Information Systems allows you to eliminate duplicated processes by sharing information between systems in a uniform and standard manner.

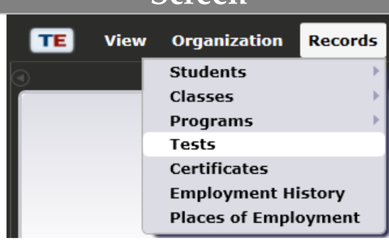
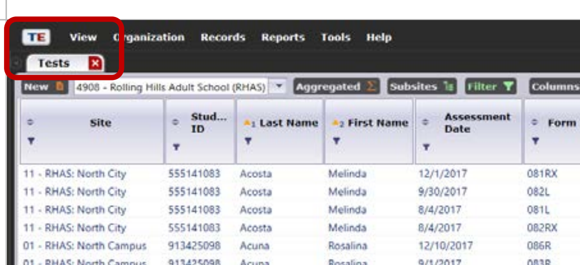
Export WIOA 3rd Party Data

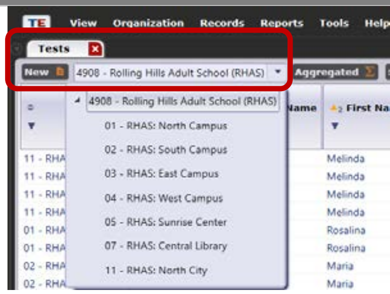
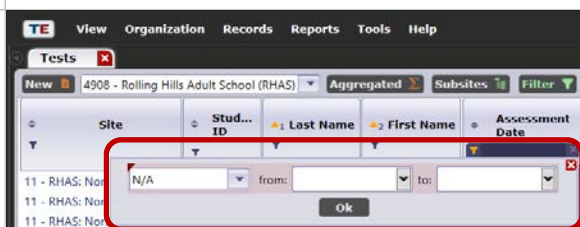
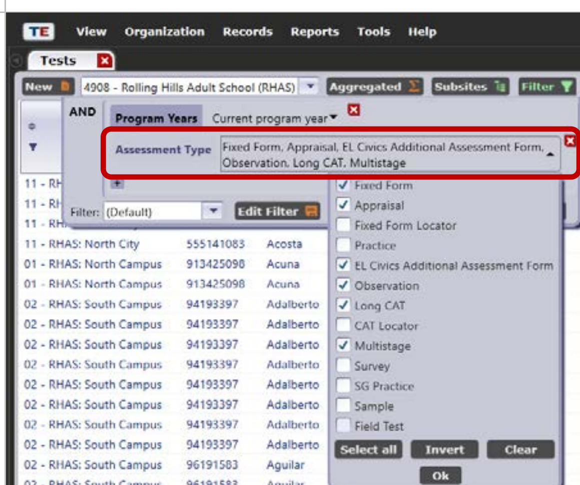
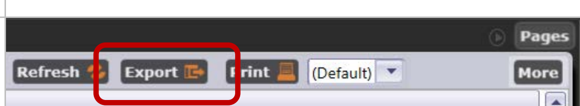
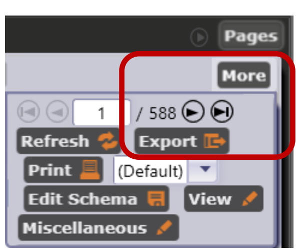
Exporting data from TE is the same process for each of the following data files.

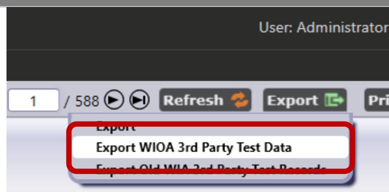
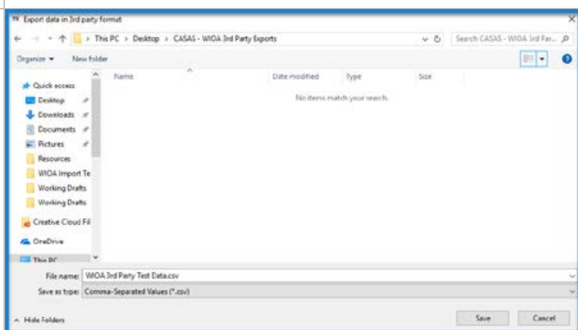
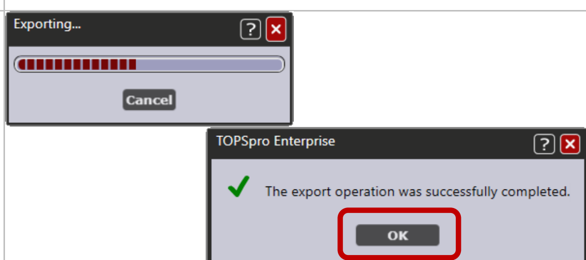
1. Personnel and User Data (PERS)
2. Class Data (CLS)
3. Demographic Data (DEM)
4. Student Program Status (SPS)
5. Entry Data (ENTR)
6. Student Class Status (SCS)
7. Attendance Data (ATT)
8. Test Data (TEST)
9. Update Data (UPDT)
10. High School Exam Results (HSE)

Test Data

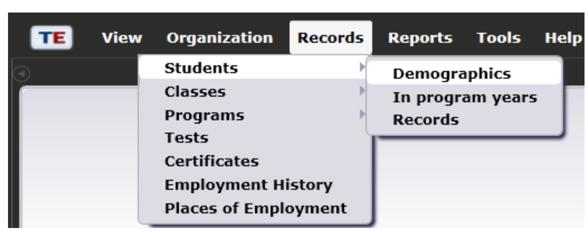
The most common data file exported from TE is test results.

Step	Screen	Description
1.		• From the Menu bar, • Click Tests.
2.		• A tabbed page opens to the list of **Test Records** in the current program year. • To filter the list and select a specific time interval, o Click the **Filter** button from the **Toolbar** at top of the list.

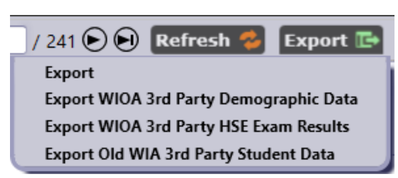
Step	Screen	Description
3.		• To select a specific **Site**, o Click the **Container** field down-arrow. • From the drop-down list, o Select the **Site**.
4.		• To specify a **Date** range, o Click the **Assessment Date** column filter. • From the drop-down fields, o Select the **Date** range.
5.		• For specific **Assessment Type**, o Click the **Filter** button from the **Toolbar** at top of the list. • From the **Filter**, o Click the **Assessment Type** down arrow. • From the drop-down list, o Check any other **Type**, if needed.
6.	 	• When the list is populated, o Click **Export** from the **Toolbar** at top right. • If the **Export** button is not available on the **Toolbar**, o Click **More** at top right. • From the drop-down menu of **'more'** buttons, o Click **Export**.

Step	Screen	Description
7.		• From the **Export** drop-down menu, o Select **Export WIOA 3rd Party Test Data**.
8.		• A popup window opens to save the **Export** file to a location on the local machine. o **Export** files are named with the type of files exported and may be changed, if needed. o Files export in a *.csv file format that cannot be changed. • Click **Save.**
9.		• Exporting begins and the process ends with a message when complete. • Click **OK**.

Demographic Data



To make data matching easier when exporting from TE for use in a 3rd party system, TE allows the End-User to specify which of the following student identifiers to export as the field titled “Student ID” in those formats that contain student-related data:



- TOPSpro Enterprise Student ID
- Social Security Number
- State-generated ID
- GED ID
- HiSET ID
- TASC ID
- NEDP ID

Export File Locations in TE

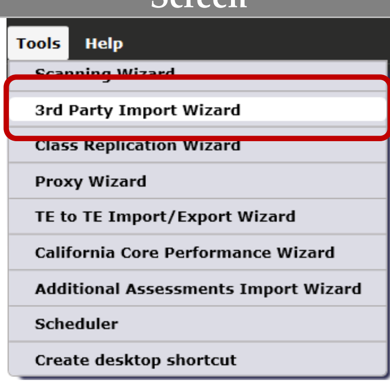
1. **Personnel and User Data (PERS)**
   - Go to Organization – Personnel – Professional Status
2. **Class Data (CLS)**
   - Go to Organization – Classes – Instances
3. **Demographic Data (DEM)**
   - Go to Records – Students – In Program Years
4. **Student Program Status (SPS)**
   - Go to Records – Programs – Records
5. **Entry Data (ENTR)**
   - Go to Records – Students – Records
6. **Student Class Status (SCS)**
   - Go to Records – Classes - Enrollments
7. **Attendance Data (ATT)**
   - Go to Records – Classes – Records
8. **Test Data (TEST)**
   - Go to Records – Tests
9. **Update Data (UPDT)**
   - Go to Records – Students – Records
10. **High School Exam Results (HSE)**
    - Go to Records > Students > In Program Years

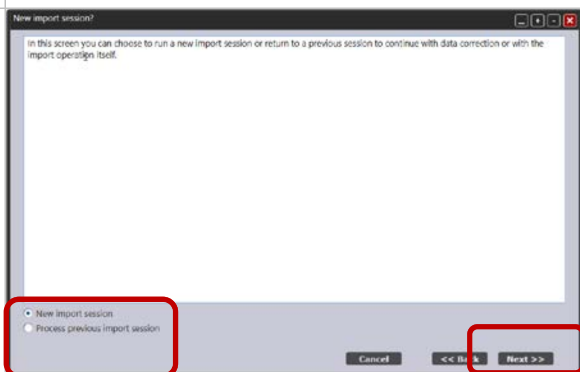
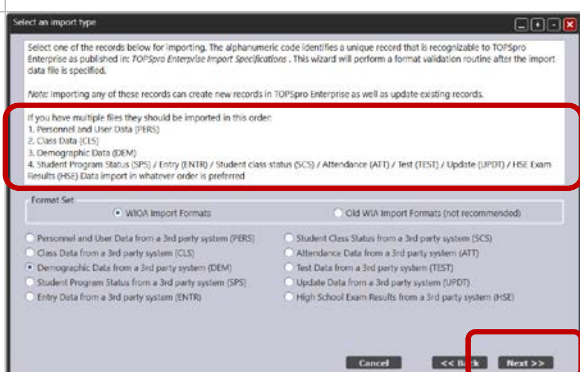
3rd Party Import Wizard

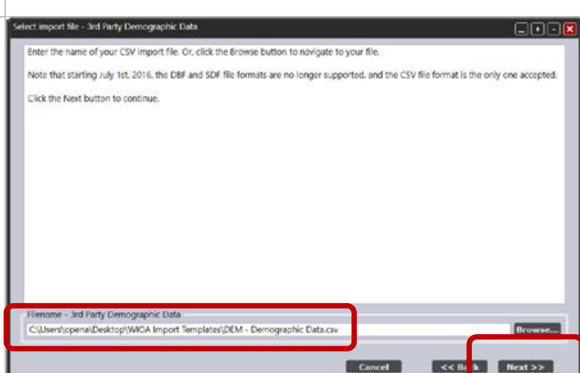
The **3rd Party Import Wizard** will step you through the process for importing records from an external data source. The process is essentially the same for each type of record however; it is important to take note of subtle differences for how you allow specific imports to populate your online account.

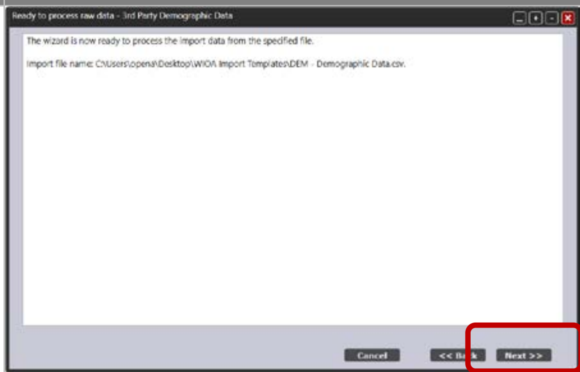
When bringing in multiple record types from 3rd Party systems, it is important to import them in the order listed for optimal record creation and organizational structure of your online account. Importing adds multiple new records in your online account as well as update existing records.

1. **Personnel and User Data (PERS) –** adds and links personnel records with user accounts for managed access to TE.
2. **Class Data (CLS) –** adds class definitions and instances, and functional roles that assign teachers to classes.
3. **Demographic Data (DEM) –** adds student demographic information.
4. **Student Program Status (SPS) –** adds program enrollment, status, and progress records.
5. **Entry Data (ENTR) –** adds student personal and labor force status, program goals, and work-related information.
6. **Student Class Status (SCS) –** adds class enrollment and status records.
7. **Attendance Data (ATT) –** adds accumulated instructional hours that are added together to report total instructional hours across time.
8. **Test Data (TEST) –** adds Test Records with scale score override.
9. **Update Data (UPTD) –** adds services received, learner results, WIOA milestones, transition, and exit information.
10. **HSE Exam Results (HSE) –** adds results from high school exit exams1.

Step	Screen	Description
1.		• From the **Menu bar,** • Click **Tools.** o Select **3rd Party Import Wizard.** • The wizard will guide you through each step of the importing process with information and directions on each screen.

Step	Screen	Description
2.		• The wizard opens with an **Introduction**. • Read the information in each window carefully. • Click **Next**.
3.		• To begin the import process, o **New import session** is set by default. • You may choose to return to a previous importing session to continue with data correction or with the import operation itself. • Click **Next**.
4.		• On the **Select an Import Type** window, o Select one of the **record types** listed for importing. • If you have multiple files to import, import them in the order listed. • Click **Next**.

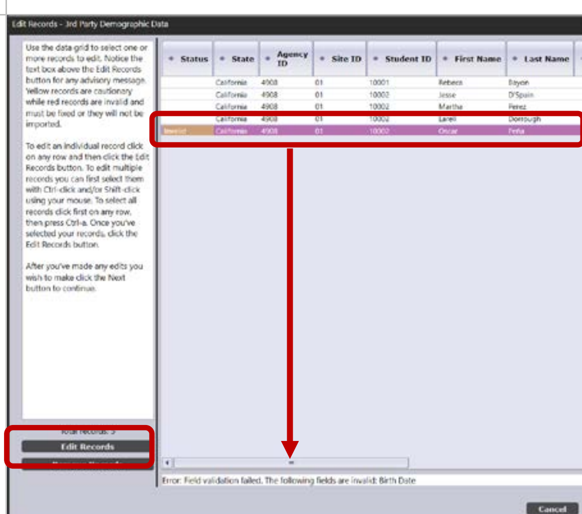
5.		• On the **Select Import File** window,
		  o Click **Browse** at bottom right.
		• Navigate to the location for your saved import file.
		  o Select the specified **Import** file.
		• Click **Next.**

<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>6.</td><td>
</td><td>• The import wizard is Ready to process [the] raw data.

IMPORTANT! Pay close attention to information about options and default settings on this window <u>before you proceed</u>, as they vary based on the type of record you are importing.

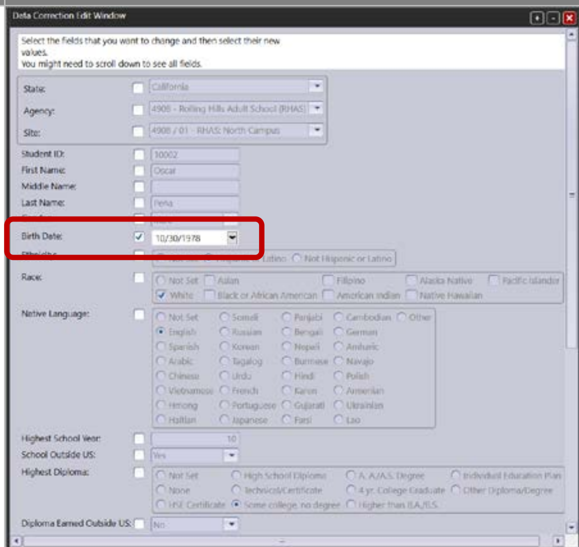
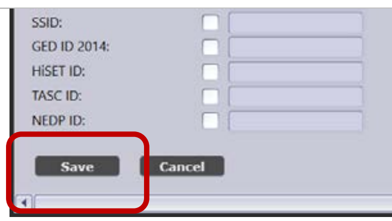
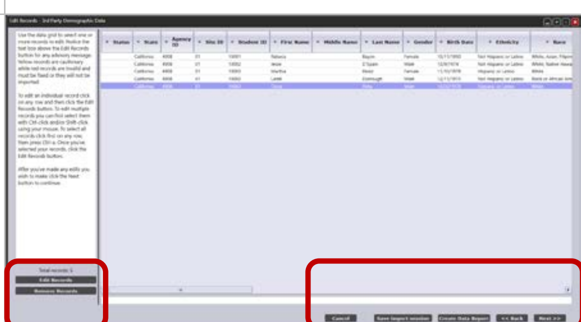
• Click Next.</td></tr>
<tr><td>7.</td><td>
</td><td>• The Raw data processed window notifies you of records read successfully, and if any records were found invalid.

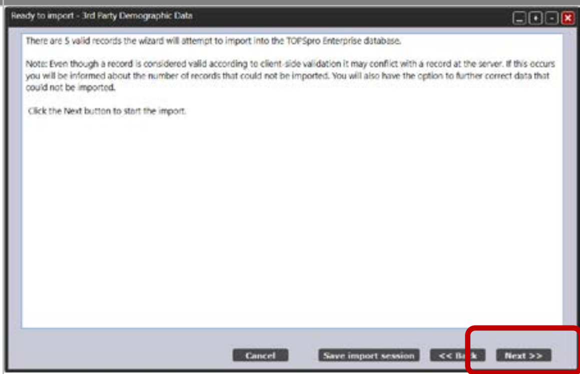
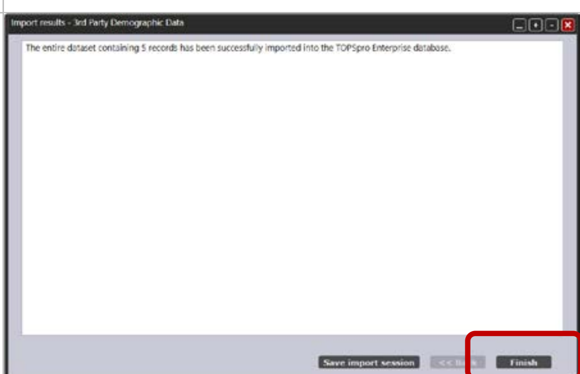
• In the next window, you will be able to edit individual records, perform a global override to all records, as well as correct invalid records.

• Click Next.</td></tr>
<tr><td>8.</td><td>
</td><td>• The Edit Records window opens with the list of import 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.</td></tr>
<tr><td>9.</td><td colspan="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.</td></tr>
</table>

Step	Screen	Description
10.		• 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 importing.
11.		• After editing all fields as needed or necessary for the appropriate action, o Click **Save** at bottom of the grid.
12.		• 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. • When you are ready to import the records, o Click **Next**.
13.	**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 import session. o **Back –** will take you to each previous window.	

Step	Screen	Description
14.	 • The time to import records varies depending on the type of record and number of records being imported. • You have the option to **Save [the] Import Session** and return later to finish.	• The **Ready to import** window indicates the number of **Valid** records the wizard will attempt to import. o 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 import. • You will also have the option to correct data for records that could not import.
15.		• The **3rd Party Import Wizard** ends with a message indicating the number of records that imported or did not import successfully.. • You have the open to **Save [the] import session** so that you can continue later with data correction or with the import operation of the imported records. o Click **Finish** to close the import session.

WIOA Import Templates

If you do not have a 3rd Party Attendance and other Information System capable of exporting data files to import in TE, you have another option to adding multiple records at one time by populating **WIOA Import Templates**. Templates are available to download from the CASAS website.

- CASAS Home > Training and Support > TOPSpro Enterprise Help > Data Exchange.

Steps to Populate Templates and Import

Follow these basic steps with each template using this example for importing student records.

Steps to Populate the Template

1. Begin with a list of students.
2. Populate the template.
   a. The minimum student information required for data validation
      i. Student ID, first and last name, gender, and date of birth.
3. Click **File** and select **Save As**.
4. Enter a **File Name** and click **Save**.
5. **Close** the populated Excel (*.xlsx) template file.

Steps to Save the Populated Template as an Import File

1. Open the populated Excel (*.xlsx) template file.
2. Click **File** and select **Save As** (do not change file name).
3. Save as type: **CSV (Comma delimited) (*.csv).**
4. Click **Save**.
5. Click **Yes** to pop-up message *"…may contain features…"*
6. Click **File** and select **Exit**.
7. Click **Save** to pop-up message *"Do you want to save changes…"*
8. Click **Save** to **Save As** pop-up window.
9. Click **Yes** to pop-up message *"…already exists…replace it?"*
10. Click **Yes** to pop-up message *"may contain features…"*
11. The populated file is now saved as an import file
    a. DO NOT OPEN (opening will invalidate the file as being importable).

Steps to Import the File in TE

1. Open **TE Client**.
2. From the menu bar, click **Tools** and select **3rd Party Import Wizard**.
3. Click **Next** on the Introduction screen. As with importing files from a 3rd Party System:
    a. Pay close attention to the options and default settings on this window before you proceed, as they will vary based on the record type you are importing
4. Click **Next** on the New import session? Screen (leave new import session selected).
5. Select **Demographic Data from a 3rd party system (DEM)** on Select a Record screen.
6. Select **Comma Separated Values (CSV)** on Select Import File screen.
7. Click **Browse** to locate and select the populated file on Select Import File screen.
8. Click **Next** on Select Import File screen.
9. On the Import Wizard screen with *"The wizard is now ready to process the import data from the specified file."* Pay close attention to the options and default settings on this window before you proceed, as they will vary based on the record type you are importing
    a. Leave checked **When missing auto-populate…(recommended)**.
    b. Leave checked **Create personnel records...(recommended)**.
    c. Click **Next**.
10. Click **Next** on **Import Wizard** screen with *"The content of the specified import file has been read successfully."*
11. On **Edit Records** screen:
    a. Edit records, if needed.
    b. Click **Next**.
12. Click **Next** on Ready to Import screen.
13. Click **Finish** on Import Results screen.

View Data to Confirm Successful Importing of Multiple Records

For **Demographics**, you may need to uncheck the Current Program Year (PY) filter if students have no activity in the current PY.

1. TE Client > Records > Students > **Demographics**
2. TE Client > Records > Students > Demographics > **Student Records** (from Navigator)
3. TE Client > Records > Students > Demographics > **Demographic History** (from Navigator)

ACTIVITY: Importing Data Files

STEP 1: Populate Import Templates with fictitious data.

STEP 2: Import data files in the order listed.

STEP 3: View data after each import to confirm successful importing of multiple records.

1. **Personnel and User Data (PERS)**
   Note: This import links the Personnel Registration with a User Account.
   1) TE > Organization > Personnel > Registration
   2) TE > Organization > Users

2. **Class Data (CLS)**
   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

3. **Demographic Data (DEM)**
   Note: you may need to uncheck the Current Program Year (PY) filter if students have no activity in the current PY
   1) TE Client > Records > Students > Demographics
   2) TE Client > Records > Students > Demographics > Student Records (from Navigator)
   3) TE Client > Records > Students > Demographics > Demographic History (from Navigator)

4. **Student Class Status (SCS)**
   1) TE > Organization > Classes > Instances > Class Enrollments (from Navigator)
   2) TE > Records > Students > Demographics > Class Enrollments (from Navigator)
   3) TE > Records > Classes > Enrollments

5. **Attendance Data (ATT)**
   1) TE > Organization > Classes > Instances > Instructional Hours (from Navigator)
   2) TE > Organization > Classes > Instances > Class Records (from Navigator)
   3) TE > Records > Students > Demographics > Class Records (from Navigator)
   4) TE > Records > Classes > Records

6. **Test Data (TEST)**
   1) TE > Students > Demographics > Tests (from Navigator)
   2) Records > Tests
   3) TE > Records > Tests

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.

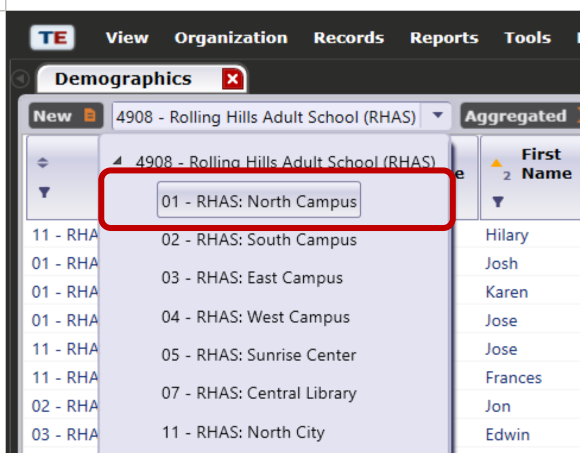
Same Student with More Than Two Different IDs at the Same Site

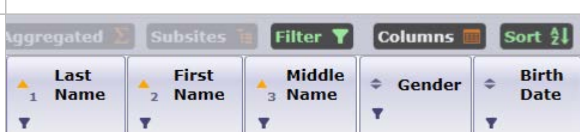
Only two duplicate records of the same student at the same site may be merged at one time. If more than two records are duplicated at the same site, such as three duplicates:

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.

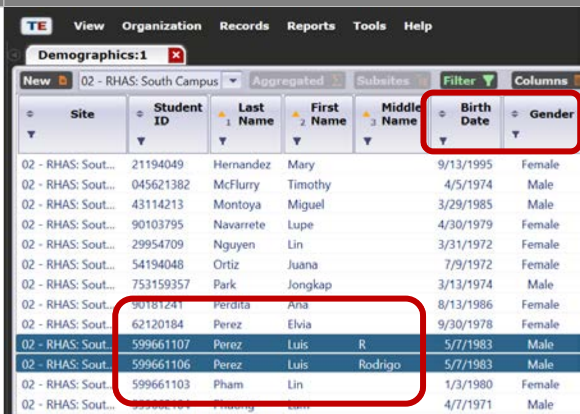
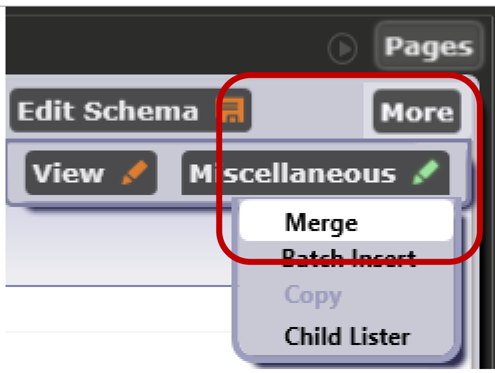
<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>1.</td><td>
</td><td>• From the Menu bar at top,
o Click Records.
• Select Students.
o Click Demographics.
• A tabbed page will open to the list of Demographics records in the current program year.</td></tr>
<tr><td>2.</td><td>
</td><td>• Because duplicate records must be at the same site to merge –
• Click the Container field down-arrow from the Toolbar at top.
o Select a Site.

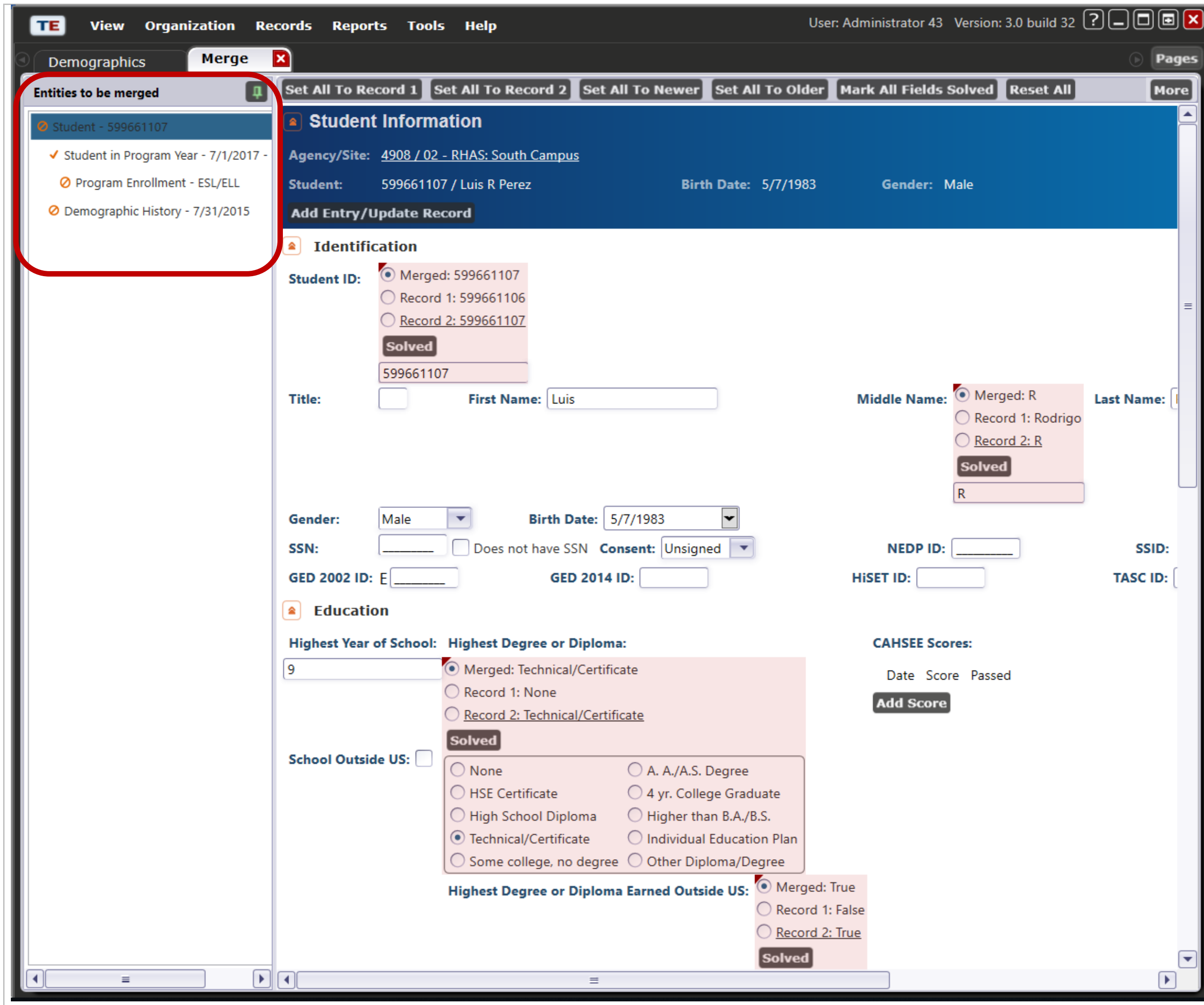
Tip!
• Run the Duplicate Students report to identify duplicate records at the same site.</td></tr>
<tr><td>3.</td><td>

1. First, sort on Last Name.
2. Second, sort on First Name.
Second, sort on First Name.

Adding Gender and DOB columns will also help with identifying duplicates.</td><td>• Suggestion: Configure and presort columns:
1. Click the UP arrow in the Last Name column header.
2. Hold down the Ctrl key on your keyboard, and then click the UP arrow in the First Name column header.

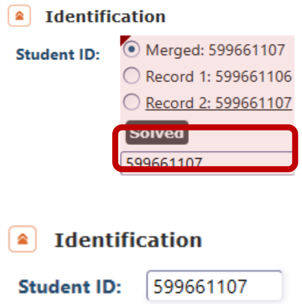
• Hold down the Ctrl key on your keyboard, and then click the UP arrow in the First Name column header.</td></tr>
</table>

Step	Screen	Description
4.		• For duplicate records, o Click to highlight the **First** record. o 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.		• With two duplicate records highlighted, o Click the **More** button at top right. o Select **Miscellaneous.** o Click **Merge**. • *Note!* The **Merge** button is only available *after* selecting duplicate records.
6.	**IMAGE NEXT PAGE** • The **Merge Wizard** opens in a new tab with a split screen o At right, the **Entities to be merged**. ▪ Identifies records with conflicting data fields. o At left, combined **Demographics** for the selected duplicated records. ▪ Identifies data fields highlighted pink with conflicting information that must be solved. *Note!* • Conflicting data fields in ***all*** **Entities to be merged** must be solved before the merge process can begin.	

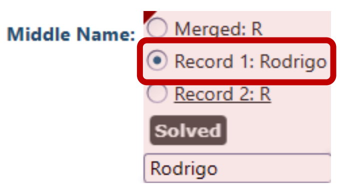


The **Toolbar** at top of the **Merge Wizard** offers shortcut options to merge the two selected records.

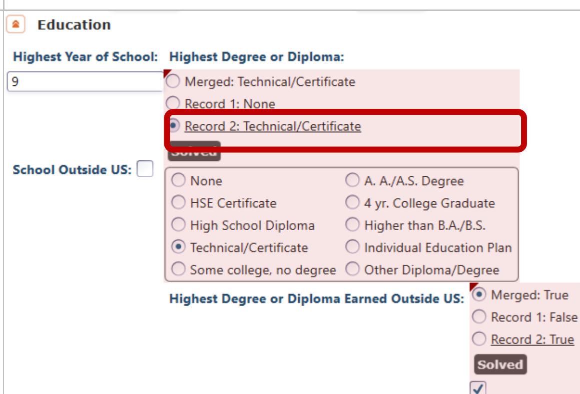
Set All To Record 1	➢ Automatically uses all of the information from the first record to create the merged record.
Set All To Record 2	➢ Automatically uses the data from the second record.
Set All To Newer	➢ Automatically selects the data from the most recent record.
Set All To Older	➢ Selects data from 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.

<table>
<tr><th>Step</th><th>Screen</th><th>Description</th></tr>
<tr><td>7.</td><td>
</td><td>

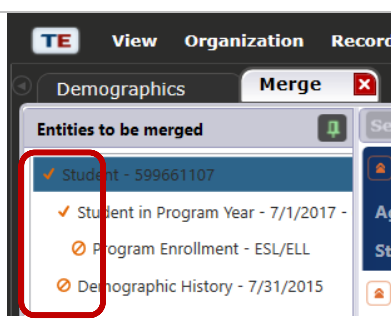
- For **Student ID**,
  - o Select the 'correct' **ID**.
- Click **Solved**.
- The **Student ID** field now displays the solved information.

</td></tr>
<tr><td>8.</td><td>
</td><td>

- The recommendation for solving **Middle Name** fields is to
  - o Select the <u>full</u> **Middle Name** for added unique identifying information about a student.
  - o Click **Solved**.

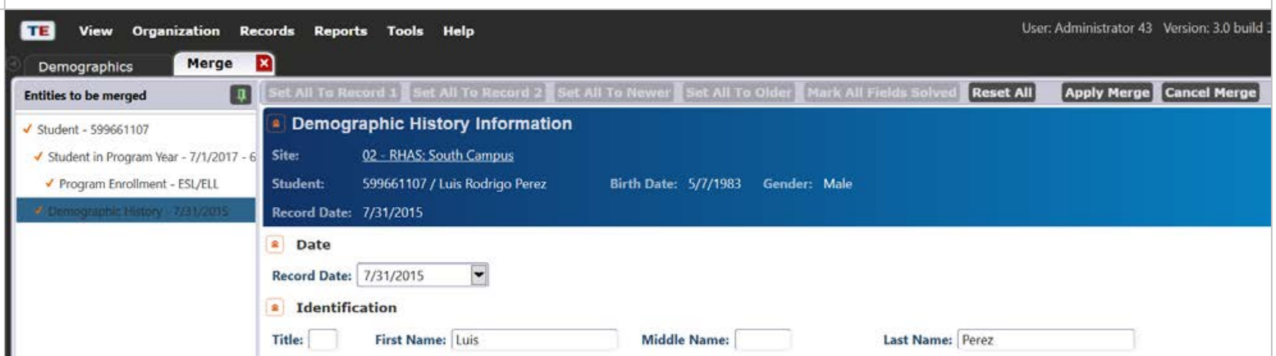
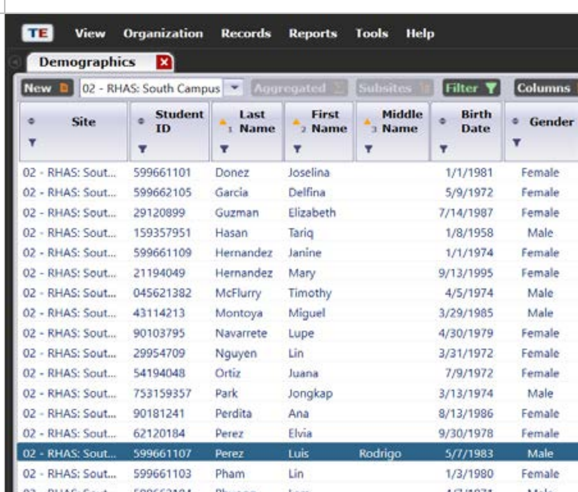
</td></tr>
<tr><td>9.</td><td>
</td><td>

- For data fields where no previous information exists (i.e., None),
  - o Select the **added information**.
  - o Click **Solved**.

</td></tr>
<tr><td>10.</td><td>
</td><td>

- 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.**

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

Step	Screen	Description
11.	From the **Toolbar** at top right, • 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**. **IMPORTANT!** This operation cannot be undone!	
12.		
13.		• The message at left will display when the **Merge** process is complete. o Click **OK**.
14.		• The **Merge Wizard** closes automatically and returns you to the **Demographics** lister. • The newly merged record is highlighted in the list.

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- TOPSpro Enterprise Help

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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!

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