Using TE Data Import Templates

If you do not have a third-party system or another information system capable of exporting data files to import into TE, you can add multiple records seamlessly by populating TE Data Import Templates.

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 the 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 the **Select a Record** screen.
6. Select **Comma Separated Values (CSV)** on the **Select Import File** screen.
7. Click **Browse** to locate and select the populated file on the **Select Import File** screen.
8. Click **Next** on the **Select Import File** screen.
9. On the Import Wizard screen *"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 the **Import Wizard** screen: "*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 the **Ready to Import** screen.
13. Click **Finish** on the **Import Results** screen.

View Data to Confirm the 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)

Location of Imported Data Files

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