

## Using the 3<sup>rd</sup> Party Import Wizard

The **3<sup>rd</sup> Party Import Wizard** will guide you through importing records from an external data source. The process is essentially the same for importing each type of record; however, it is essential to note subtle differences in how you allow specific imports to populate your online account.

When importing multiple record types from third-party systems, it is essential to import them in the order listed for optimal record creation and organizational structure of your online account. Importing adds multiple new records to your online account and updates existing records.

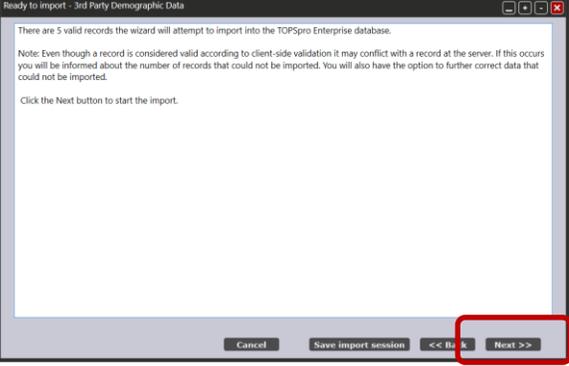
1. **Personnel and User Data (PERS)** – adds and links personnel records with user accounts for managed access to TE.
2. **Class Data (CLS)** – adds class definitions and instances, and functional roles that assign teachers to classes.
3. **Demographic Data (DEM)** – adds student demographic information.
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 exams<sup>1</sup>.

Step	Screen	Description
1.		<ul style="list-style-type: none"> <li>• From the <b>Menu bar</b>,</li> <li>• Click <b>Tools</b>.                             <ul style="list-style-type: none"> <li>○ Select <b>3<sup>rd</sup> Party Import Wizard</b>.</li> </ul> </li> <li>• The wizard will guide you through each step of the importing process with information and directions on each screen.</li> </ul>

Step	Screen	Description
2.		<ul style="list-style-type: none"> <li>The wizard opens with an <b>Introduction</b>.                     <ul style="list-style-type: none"> <li>Read the information in each window carefully.</li> </ul> </li> <li>Click <b>Next</b>.</li> </ul>
3.		<ul style="list-style-type: none"> <li>To begin the import process,                     <ul style="list-style-type: none"> <li><b>New import session</b> is set by default.</li> </ul> </li> <li>You may return to a previous importing session to continue with data correction or the import operation itself.</li> <li>Click <b>Next</b>.</li> </ul>
4.		<ul style="list-style-type: none"> <li>On the <b>Select an Import Type</b> window,                     <ul style="list-style-type: none"> <li>Select one of the <b>record types</b> listed for importing.</li> </ul> </li> <li>If you have multiple files to import, import them in the order listed.</li> <li>Click <b>Next</b>.</li> </ul>
5.		<ul style="list-style-type: none"> <li>On the <b>Select Import File</b> window,                     <ul style="list-style-type: none"> <li>Click <b>Browse</b> at the bottom right.</li> </ul> </li> <li>Navigate to the location for your saved import file.                     <ul style="list-style-type: none"> <li>Select the specified <b>Import file</b>.</li> </ul> </li> <li>Click <b>Next</b>.</li> </ul>

Step	Screen	Description
6.		<ul style="list-style-type: none"> <li>The import wizard is <b>Ready to process [the] raw data</b>.</li> <li><b>IMPORTANT!</b> Before you proceed, pay close attention to information about options and default settings on this window, as they vary depending on the type of record you are importing.</li> <li>Click <b>Next</b>.</li> </ul>
7.		<ul style="list-style-type: none"> <li>The <b>Raw data processed</b> window notifies you that records were read successfully and if any were found invalid.</li> <li>In the next window, you can edit individual records, perform a global override to all records, and correct invalid ones.</li> <li>Click <b>Next</b>.</li> </ul>
8.		<ul style="list-style-type: none"> <li>The <b>Edit Records</b> window opens with the list of import records.</li> <li>The <b>Data Grid</b> at the left of the list provides directions for editing records if needed. <ul style="list-style-type: none"> <li><b>Yellow</b> records are cautionary.</li> <li><b>Red</b> records are invalid.</li> </ul> </li> <li>Click on a <b>color record</b> to display an advisory message about the record at the bottom of the list.</li> <li>With the color record highlighted, <ul style="list-style-type: none"> <li>Click <b>Edit Records</b>.</li> <li>Or double-click to open the <b>Data Correction Grid</b>.</li> </ul> </li> </ul>
9.		<ul style="list-style-type: none"> <li>To <b>edit multiple records</b>, first select them with <b>Ctrl + click</b> and/or <b>Shift + click</b>.</li> <li>To <b>select all records</b>, click first on any row, then press <b>Ctrl + A</b>.</li> <li>After selecting records, click <b>Edit Records</b>.</li> </ul>

Step	Screen	Description
10.		<ul style="list-style-type: none"> <li>The <b>Data Correction Edit Window</b> opens to,                             <ul style="list-style-type: none"> <li><b>Edit</b> individual records.</li> <li><b>Apply</b> a global override to all records.</li> <li><b>Correct</b> invalid records.</li> </ul> </li> <li>Check fields to change and then select their new values.</li> <li>You may need to scroll down the grid to see all data fields.</li> </ul> <p><i>Note!</i> Data fields will vary based on the type of records you are importing.</p>
11.		<ul style="list-style-type: none"> <li>After editing all fields as needed or necessary for the appropriate action,                             <ul style="list-style-type: none"> <li>Click <b>Save</b> at the bottom of the grid.</li> </ul> </li> </ul>
12.		<ul style="list-style-type: none"> <li>When returned to the <b>Edit Records</b> window,                             <ul style="list-style-type: none"> <li>The list of records should be clear of color records to indicate that all records are cleared for import.</li> </ul> </li> <li>When you are ready to import the records,                             <ul style="list-style-type: none"> <li>Click <b>Next</b>.</li> </ul> </li> </ul>
13.	<p><b>Additional Button Options:</b></p> <ul style="list-style-type: none"> <li><b>Remove Records</b> – eliminates a record from being imported.</li> <li><b>Cancel</b> – ends the import session without importing records.</li> <li><b>Save scanning session</b> – creates a file of the scan session so that you can continue later with data correction.</li> <li><b>Create Data Report</b> – will save a PDF report showing a breakdown of the records in the import session.</li> <li><b>Back</b> – will take you to each previous window.</li> </ul>	

Step	Screen	Description
<p>14.</p>	 <ul style="list-style-type: none"> <li>The time to import records varies depending on the type of record and the number of records being imported.</li> <li>You can <b>Save [the] Import Session</b> and return later to finish.</li> </ul>	<ul style="list-style-type: none"> <li>The <b>Ready to import</b> window indicates the number of <b>Valid</b> records the wizard will attempt to import.                             <ul style="list-style-type: none"> <li>Click <b>Next</b>.</li> </ul> </li> </ul> <p><i>Note!</i></p> <ul style="list-style-type: none"> <li>Even though a record is considered <b>Valid</b> according to your TE Client, it may conflict with a record at the CASAS server.</li> <li>If this occurs, the system will inform you about the number of records that could not be imported.</li> <li>You will also be able to correct data for records that could not be imported.</li> </ul>
<p>15.</p>		<ul style="list-style-type: none"> <li>The <b>3<sup>rd</sup> Party Import Wizard</b> ends with a message indicating the number of records that were imported or were not imported successfully.</li> <li>You have the option to <b>Save [the] Import Session</b> so that you can continue later with data correction or with the import operation of the imported records.                             <ul style="list-style-type: none"> <li>Click <b>Finish</b> to close the import session.</li> </ul> </li> </ul>