#### 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 exams1.

Step	Screen	Description
1.	Tools       Help         Scanning Wizzed         3rd Party Import Wizard         Class Replication Wizard         Proxy Wizard         TE to TE Import/Export Wizard         California Core Performance Wizard         Additional Assessments Import Wizard         Scheduler         Create desktop shortcut	<ul> <li>From the Menu bar,</li> <li>Click Tools. <ul> <li>Select 3<sup>rd</sup> Party Import Wizard.</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.	the second seco	<ul> <li>The wizard opens with an Introduction.</li> <li>Read the information in each window carefully.</li> <li>Click Next.</li> </ul>
3.	New import session       • • • • • • • • • • • • • • • • • • •	<ul> <li>To begin the import process, <ul> <li>New import session 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 Next.</li> </ul>
4.	Select an import type  Select one of the records below for importing. The alphanumeric code identifies a unique record that is recognizable to TOPSpro Enterprise a published in TOPSpro Enterprise Import Specifications. This witand will perform a format validation routine after the import data file is specified.  Auto: Importing any of these records can create new records in TOPSpro Enterprise as well as update existing records.  If you have multiple files they should be imported in this order:  1. Presoned and User Data (FES)  2. Class Data (CL3)  3. Class Data (TDE) (Farly (FMR) / Student class status (SCS) / Attendance (ATT) / Text (FEST) / Update (UPDT) / HEE Exam Results (HSE) Data import in whatever order is preferred  Format Set  • MOAL Import Formats • of d WAA Import Formats • Old WAA Import Formats • Student Program Status from a 3rd party system (PERS) • Exat Data from a 3rd party system (CL5) • Update Data from a 3rd party system (FES) • Update Data from a 3rd part	<ul> <li>On the Select an Import Type window, <ul> <li>Select one of the record types listed for importing.</li> </ul> </li> <li>If you have multiple files to import, import them in the order listed.</li> <li>Click Next.</li> </ul>
5.	Select import file - 3rd Party Demographic Data	<ul> <li>On the Select Import File window,         <ul> <li>Click Browse at the bottom right.</li> </ul> </li> <li>Navigate to the location for your saved import file.         <ul> <li>Select the specified Import file.</li> </ul> </li> <li>Click Next.</li> </ul>

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Step	Screen	Description
6.	Rody To process me data - Sno Party Demographic Data The wizard is now ready to process the import data from the specified file. Import file name: C:\UserSixpensi\Desktop\WICA Import Templates\DEM - Demographic Data.csv. (Cancel << R Ket >>	<ul> <li>The import wizard is Ready to process [the] raw data.</li> <li><i>IMPORTANT!</i> 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 Next.</li> </ul>
7.	Rew data processed - 3rd Party Demographic Data The content of the specified import file has been read successfully. Some processed records (1) have been found to be invalid according to the "DPSpro Enterprise criteria. A record may be invalid because on the primit data defining on reaction. The following screen will allow you to correct these records and use colleved in edit if your access rights do not primit data defining on reaction. The following screen will allow you to correct these records and use colleved in edit if multicle them to strong you goes the relevang the the records and the screen data defining the reaction of mew agencies and/or sites if imported. We strongly suggest relevang these records (Solovid en lyobing) in the record grid diglaged in the next Screen(s) to make sure the import routine will not create unifiended new data containers. Click the Newt button to continue.	<ul> <li>The Raw data processed 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 Next.</li> </ul>
8.	Cell Routes       2014 Petry Cennergyber Data         Use the data gift to select on orriging the base of the first select on orriging the select on organization of the select on orriging the select on orriging the select on organization of the select on	<ul> <li>The Edit Records window opens with the list of import records.</li> <li>The Data Grid at the left of the list provides directions for editing records if needed.         <ul> <li>Yellow records are cautionary.</li> <li>Red records are invalid.</li> </ul> </li> <li>Click on a color record to display an advisory message about the record at the bottom of the list.</li> <li>With the color record highlighted,         <ul> <li>Click Edit Records.</li> <li>Or double-click to open the Data Correction Grid.</li> </ul> </li> </ul>
9.	<ul> <li>To edit multiple records, first select t</li> <li>To select all records, click first on any</li> <li>After selecting records, click Edit Rec</li> </ul>	hem with <b>Ctrl + click</b> and/or <b>Shift + click</b> . 7 row, then press <b>Ctrl + A</b> . <b>ords</b> .



Step	Screen	Description	
10.	Data Correction Edit Window  Select the fields that you want to change and then select their new values. Vou might need to scroll down to see all fields.	• The Data Correction Edit Window opens to,	
	State: California  Agency: 4900 - Rolling Yills Adult School (RHAS).*	• <b>Edit</b> individual records.	
	Stee         4608 / 01 - 18 VdS North Campus           Student ID:         10002           First Name         Oxcar           Middle Name:         Vuta	<ul> <li>Apply a global override to all records.</li> </ul>	
	Bith Date: 10/30/1978 The Control of Latino	• <b>Correct</b> invalid records.	
	Note:     Note:     Alian     Filipino     Aladia Nulke:     Tactic Islander       Image:     Image:     Image:     Image:     Note:     Somali     Parajab     Cambodian     Other       Image:     Im	• Check fields to change and then select their new values.	
	Clareses     Utdu Utdu Ammaila     Fordal Pedal     Armenia     Armeniae     Francip Pertugates     Cagnard Utasinen     Halphest School Ware:     Tes     Tes	• You may need to scroll down the grid to see all data fields.	
		<i>Note!</i> Data fields will vary based on the type of records you are importing.	
11.	SSID: GED ID 2014: HiSET ID: TASC ID: NEDP ID: Save Cancel	<ul> <li>After editing all fields as needed or necessary for the appropriate action,</li> <li>Click Save at the bottom of the grid.</li> </ul>	
12.		<ul> <li>When returned to the Edit Records window,         <ul> <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> <li>Click Next.</li> </ul> </li> </ul>	
13.	<ul> <li>Additional Button Options:</li> <li>Remove Records – eliminates a record from being imported.</li> </ul>		
	without importing records.		
	• <b>Save scanning session</b> – creates a file of the scan session so that you can conti with data correction.		
	• <b>Create Data Report –</b> will save a I the import session.	PDF report showing a breakdown of the records in	
	• <b>Back</b> – will take you to each previ	ous window.	
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Step	Screen	Description
14.	Ready to import - 3rd Party Demographic Data	• The <b>Ready to import</b> window indicates the number of <b>Valid</b> records the wizard will attempt to import.
		<ul> <li>Click Next.</li> </ul>
		Note!
	Cancel Save Import session << D 1 Reat >>	• Even though a record is considered <b>Valid</b> according to your TE Client, it may conflict with a record at the CASAS server.
	<ul> <li>The time to import records varies depending on the type of record and the number of records being imported.</li> <li>You can Save [the] Import Session and return later to finish.</li> </ul>	• If this occurs, the system will inform you about the number of records that could not be imported.
		• You will also be able to correct data for records that could not be imported.
15.	Import results - 3rd Purty Demographic Data	• 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.
	Save import session Vent	• You have the option to <b>Save [the] Import</b> <b>Session</b> so that you can continue later with data correction or with the import operation of the imported records.
		<ul> <li>Click Finish to close the import session.</li> </ul>