

OUTLINE

Import Overview

1. Install and Login to [TOPSpro Enterprise \(TE\)](#)
2. From the top menu, go to Tools > **3rd Party Import Wizard** and explain the different types of import files:
 - a. PERS
 - b. CLS
 - c. DEM
 - d. SPS
 - e. ENTR
 - f. SCS
 - g. ATT
 - h. TEST
 - i. UPDT
 - j. HSE

Resources Under the CASAS.org Website

3. Go to CASAS.org and show the [TOPSpro Enterprise Data Exchange Specifications](#) documents:
 - a. Show **Class Data (CLS)**
 - b. Explain Required fields
 - c. New agency IDs will be given on June 22nd
 - d. Explain best practice for Extended IDs
 - e. CIP Code requirements are to be determined by IL State Officials
 - f. A-22 is for CA agencies only and it will go away soon
 - g. Revised Instructional Program and Specials Programs fields will be provided by June 22nd
4. Show the [TE Data Import Templates](#) files:
 - a. Show how to edit the **Class Data (CLS) Import Template**
 - b. Show how to save file from .xlsx to .CSV format

Import Demonstration in TE

5. Demonstrate how to import the CSV file in TE
 - a. Go to Tools > **3rd Party Import Wizard**
 - b. Explain feature for **Allow records with dates outside of the current PY to be created**
 - c. Explain **Override** and **Edit** options
 - d. Complete the import
6. Explain that agencies need to submit one of each of the import files (in CSV format) to TechSupport@CASAS.org to get a **Vendor Code** and **Approval** to import in TE. This is to be done only for the first import. We encourage to start as soon as you can as this process does not require TE, it only requires the Import Templates, Excel and an e-mail to echSupport@CASAS.org

OUTLINE

How to Find the Imported Data in TE

7. Show the listers where the imported can be found
 - a. **Personnel and User Data (PERS)**: Go to Organization > Personnel > Registration
 - b. **Class Data (CLS)**: Go to Organization > Classes > Definition/Instances
 - c. **Demographic Data (DEM)**: Go to Records > Students > Demographics
 - d. **Student Program Status (SPS)**: Go to Records > Programs > Records
 - e. **Entry Data (ENTR)**: Go to Records > Students > Records
 - f. **Student Class Status (SCS)**: Go to Records > Classes > Enrollments
 - g. **Attendance Data (ATT)**: Go to Records > Classes > Records
 - h. **Test Data (TEST)**: Go to Records > Tests
 - i. **Update Data (UPDT)**: Go to Records > Students > Records
 - j. **High School Exam Results (HSE)**: Go to Records > Students > Demographics
8. Demonstrate where to find the imported from the **Class Data (CLS)** file