

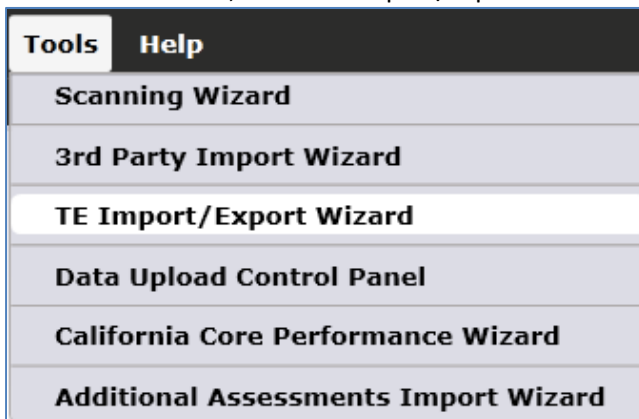
# Using the TE – TE Import Wizard – Using the Archive Feature

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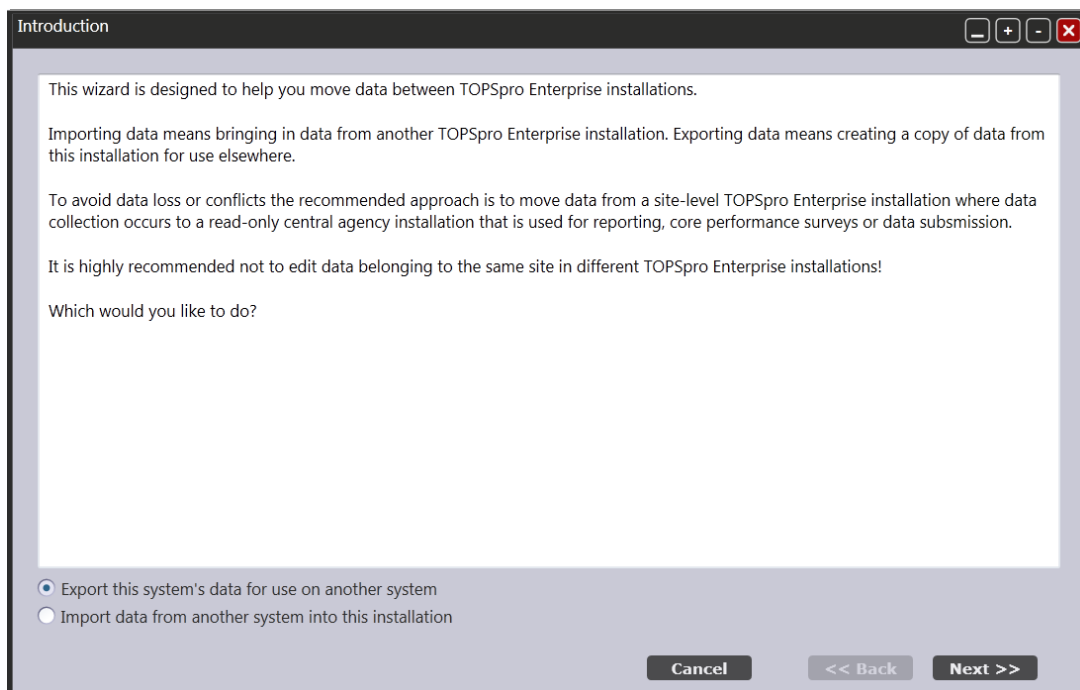
The TE – TE Import Wizard enables you to create zip files of your own TE data so that you can then append it to other existing installations of TE, or bring in data files from other sites to add to your own installation. This wizard also includes an archive feature that enables you to export and remove data from your database.

This exercise details how to archive your TE data.

1. On the Tools menu, select TE Import/Export Wizard.



2. Select Export this system's data for use on another system, and then click Next.



3. Select the correct agency (generally your own agency) and then click Next.

Select Agencies

Select the agency (or agencies) for which you want to export data.

When a single agency is selected you have the option to further filter the exported data by class(es) and/or student(s).

Click the Next button to continue.

**Selected agencies**

4908 - Rolling Hills Adult School

**Available agencies**

0013 - 0013  
007 - 007  
10020 - 10020  
10055 - 10055  
1046 - 1046  
1047 - 1047  
1123 - Rohan's Agency  
1234 - 1234  
12345 - Pancheck

<- Add  
Remove ->  
<- Add all  
Remove all ->

Cancel << Back Next >>

4. Select the specific site (or sites) to be included in the export file by checking (or unchecking) the specific boxes.

Select Sites

Select the specific site (or sites) for which you want to export data. By default all sites under the selected agency/agencies are automatically selected.

Click the Next button to continue.

4908 - Rolling Hills Adult School

1 - North Campus

11 - North City ESL

2 - South Campus

3 - East Campus

4 - West Campus

5 - Center for Adults with Disabilities

6 - Southwest Campus

Cancel << Back Next >>

- In the next step, you have the option to filter the exported student data by one or more specific instructional programs. For this example, select Filter exported data by instructional program. This opens up the check boxes for each specific program. Check the boxes for ABE and ESL, and then click Next.

Select Programs

You have the option to filter the exported student data by one or more specific instructional programs. A student record will be included in the output dataset only if the student has at least one enrollment record in one of the selected instructional programs.

Click the Next button to continue.

Do not filter exported data by instructional program  
 Filter exported data by instructional program

<input checked="" type="checkbox"/> Basic Skills (ABE)	<input type="checkbox"/> GED	<input type="checkbox"/> Health & Safety	<input type="checkbox"/> ROCP
<input checked="" type="checkbox"/> ESL	<input type="checkbox"/> Spanish GED	<input type="checkbox"/> Home Economics	
<input type="checkbox"/> ESL/Citizenship	<input type="checkbox"/> Career/Tech Ed	<input type="checkbox"/> Parent Education	
<input type="checkbox"/> Citizenship	<input type="checkbox"/> Workforce Readiness	<input type="checkbox"/> Older Adults	
<input type="checkbox"/> High School Diploma	<input type="checkbox"/> Adults w/Disabilities	<input type="checkbox"/> Other Program	

- Next, you can filter by specific classes. Select filter exported data by classes to open the screen for editing. Use the check boxes in the left hand column, and filter and sort the same way as in the TE listers to select these classes.

Select Classes

You have the option to filter the exported student data by one or more specific classes. A student record will be included in the output dataset only if the student has at least one enrollment record or one assessment record in one of the selected classes.

Click the Next button to continue.

Do not filter exported data by classes  
 Filter exported data by classes

Agency/Site: 4908 - Rolling Hills Adult School  
 Subsites: [icon] Filter: [icon] Columns: [icon] Sort: [icon] More: [icon]

<input checked="" type="checkbox"/>	Site	▲ <sub>1</sub> Class ID	Class Description	▲ <sub>2</sub> Extended ID	Course Cod
<input checked="" type="checkbox"/>	1 - North Campus	1	ABE	1	

7. For this exercise, filter the lister for Site 11, and then select class 110 and 111.

Select Classes

You have the option to filter the exported student data by one or more specific classes. A student record will be included in the output dataset only if the student has at least one enrollment record or one assessment record in one of the selected classes.

Click the Next button to continue.

Do not filter exported data by classes  Filter exported data by classes

Agency/Site: 4908 - Rolling Hills Adult School

Subsites: Filter Columns Sort

<input type="checkbox"/>	Site	Class ID	Class Description	Extended ID	Course Code
<input checked="" type="checkbox"/>	11 - North City ESL	110	Low Beginning		
<input checked="" type="checkbox"/>	11 - North City ESL	111	Intermediate High		
<input type="checkbox"/>	11 - North City ESL	112	Mixed ESL		
<input type="checkbox"/>	11 - North City ESL	114	ESL Advanced - Distance Learning		
<input type="checkbox"/>	11 - North City ESL	9999	ESL-ELCVICS		

Cancel << Back Next >>

8. In the next screen you can filter for specific students. To filter by student, follow the same steps as you did to filter by class. For this exercise, select Do not filter exported data by student, and then click Next.

Select Students

You have the option to filter the exported data by one or more specific students.

Click the Next button to continue.

Do not filter exported data by students  Filter exported data by students

Agency/Site: 4908 - Rolling Hills Adult School

Aggregated Subsites Filter Columns Sort

<input checked="" type="checkbox"/>	Site	Student ID	Name	Birth Date	Gender	Ethnic
<input checked="" type="checkbox"/>	1 - North Campus	000221864	Popica Mangalau		Male	Not Hispanic or
<input checked="" type="checkbox"/>	1 - North Campus	000221865	Mitica Mititelu			
<input checked="" type="checkbox"/>	1 - North Campus	000222222				
<input checked="" type="checkbox"/>	1 - North Campus	000456733	Vasile Armasar	4/4/1979	Male	Not Hispanic or
<input checked="" type="checkbox"/>	1 - North Campus	000657892	Gheorghe Bradulescu	4/18/1978	Male	Not Hispanic or

Cancel << Back Next >>

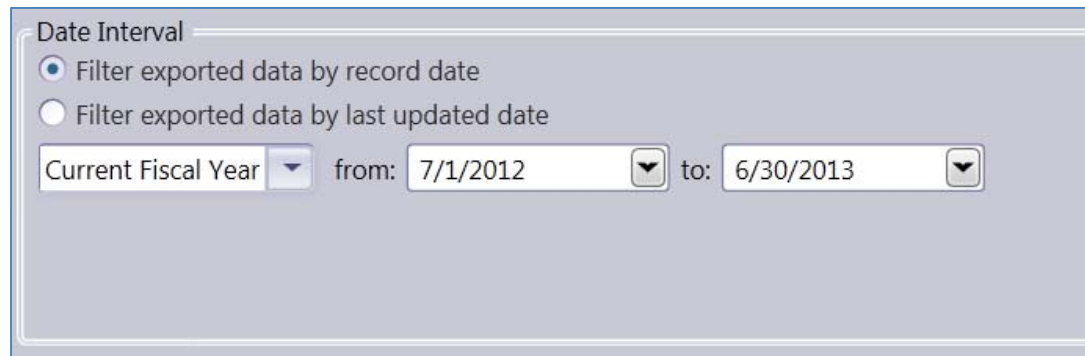
9. Next, you have the option to filter the export file by date. TE provides three different ways to do this:

- a. Filter by Program Year. Select only specific fiscal years to include in the export file.



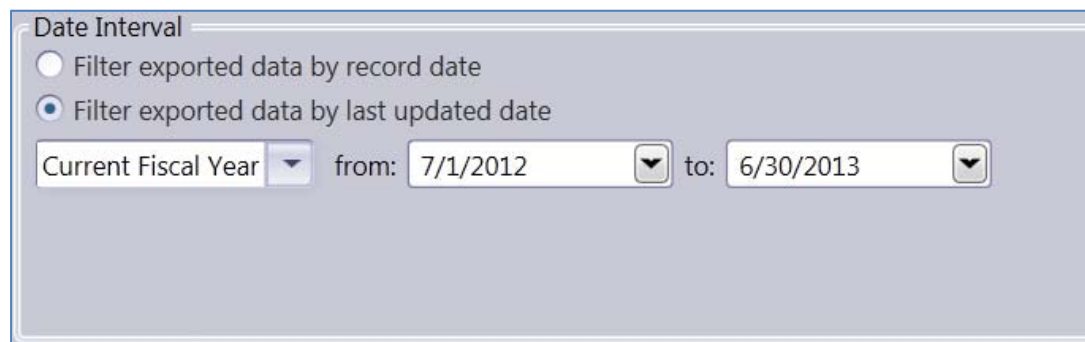
The screenshot shows a window titled "Program Years" with a radio button selected for "Filter exported data by program year". Below this are five checkboxes, each followed by a fiscal year range: "2012 - 2013", "2011 - 2012", "2010 - 2011", "2009 - 2010", and "2008 - 2009". All checkboxes are currently unchecked.

- b. Filter exported data by record date. Assign a more specific date range for the contents of the export file. Use the drop boxes to select specific date criteria (by quarter, by month, and so on) and to specify exact dates for the file. Choosing this option filters by the date of record.



The screenshot shows a window titled "Date Interval" with two radio buttons. The first, "Filter exported data by record date", is selected. The second is "Filter exported data by last updated date". Below the radio buttons is a dropdown menu set to "Current Fiscal Year", followed by "from:" and a date field containing "7/1/2012", "to:" and a date field containing "6/30/2013".

- c. Filter exported data by last updated date. Like the other date interval option, use the drop boxes to select specific date criteria. This selection filters according the most recent date records were updated for that student, rather than using the date directly indicated on the record.



The screenshot shows a window titled "Date Interval" with two radio buttons. The first is "Filter exported data by record date" and the second, "Filter exported data by last updated date", is selected. Below the radio buttons is a dropdown menu set to "Current Fiscal Year", followed by "from:" and a date field containing "7/1/2012", "to:" and a date field containing "6/30/2013".

10. For this exercise, filter by Program Year, and select 2011-12 and 2010-11.



Program Years

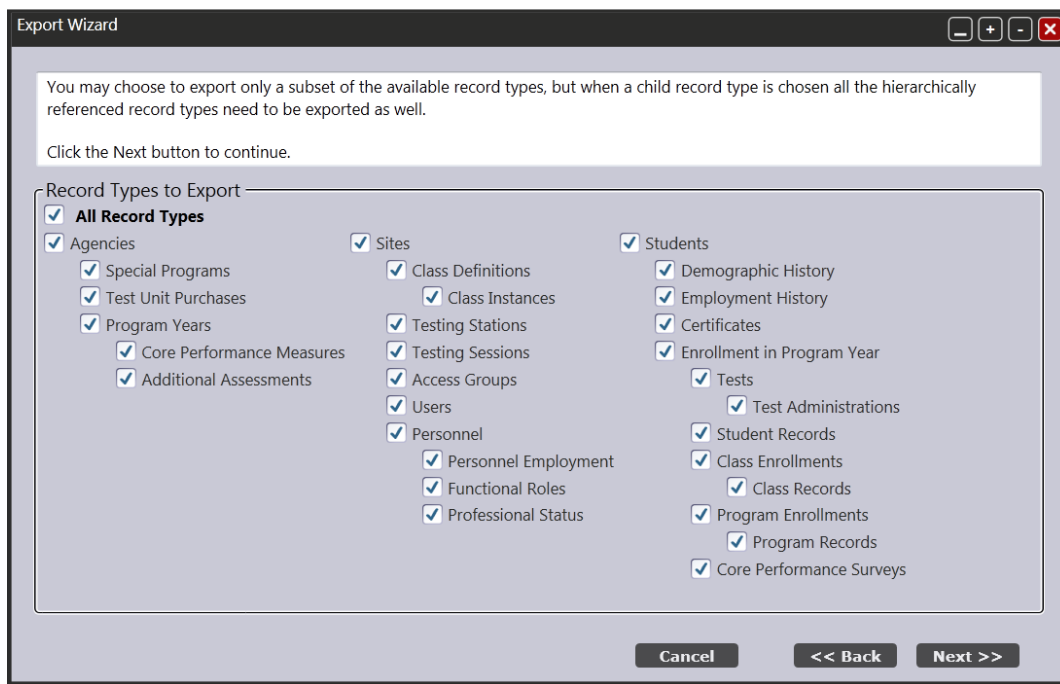
Filter exported data by program year

2012 - 2013

2011 - 2012

2010 - 2011

11. Next, you can select specific records to include in the file. Almost all of the different types of records in TE are available to select/deselect. For this exercise, select All Record Types and then click Next.



Export Wizard

You may choose to export only a subset of the available record types, but when a child record type is chosen all the hierarchically referenced record types need to be exported as well.

Click the Next button to continue.

Record Types to Export

**All Record Types**

Agencies

Sites

Students

Special Programs

Class Definitions

Demographic History

Test Unit Purchases

Class Instances

Employment History

Program Years

Testing Stations

Certificates

Core Performance Measures

Testing Sessions

Enrollment in Program Year

Additional Assessments

Access Groups

Tests

Users

Test Administrations

Personnel

Student Records

Personnel Employment

Class Enrollments

Functional Roles

Class Records

Professional Status

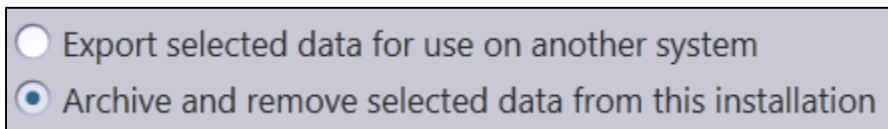
Program Enrollments

Program Records

Core Performance Surveys

Cancel << Back Next >>

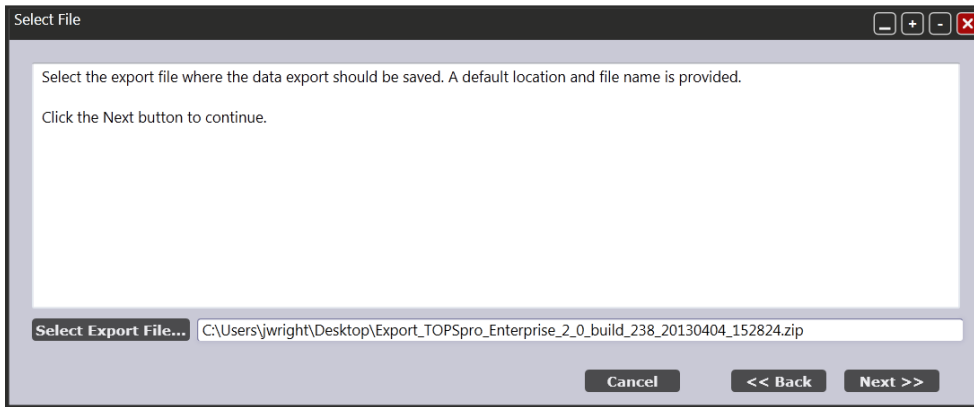
12. The next screen is where you indicate whether to create a simple export (where you create a file to send to another TE installation) or archive (where you create AND remove the data selected for the file.) Select Archive and click Next.



Export selected data for use on another system

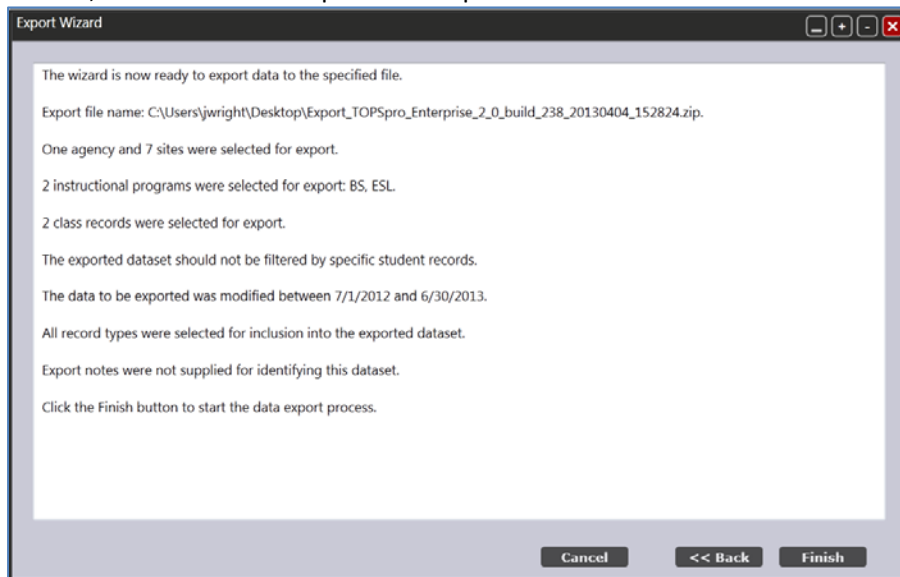
Archive and remove selected data from this installation

13. The next screen prompts you to save the file. Click Select Export File to save the file to your hard drive or to an external drive such as a CD, floppy disk, or thumb drive (recommended.) For this exercise we will simply save the file to our Desktop. Click Next.



14. In Collect Export Notes, you can record any message about this file to better identify the contents of the file. Click Next.

15. The final screen summarizes the contents of the export file. Review the information, and, if correct, click Finish to complete the Export.



16. After clicking Finish, you have the option to create and save an Export Log.

