Using the 3rd Party Import Wizard

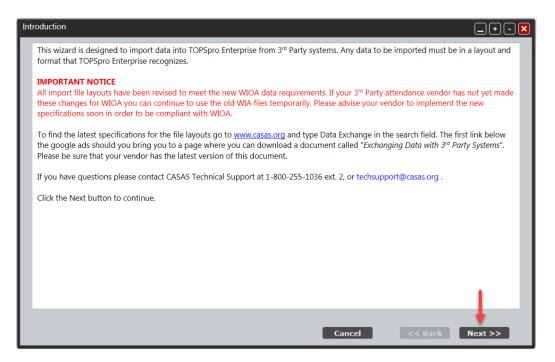
The 3rd Party Import Wizard has been updated with the new WIOA format and now enables you to import **Attendance Hours, Class Data, Demographic Data, Entry Data, High School Exam Results, Personnel and User Data, Student Class Status, Student Program Status, Test Data**, and **Update Data** files from a 3rd party system into your TE database.

This exercise details how to import Attendance Hours from 3rd Party export file.

1. On the Tools menu, select 3rd Party Import Wizard

Tools Help			
Scanning Wizard			
3rd Party Import Wizard 🛛 🛶 🚃 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶 🛶			
Class Replication Wizard			
Proxy Wizard			
TE to TE Import/Export Wizard			
California Core Performance Wizard			
Additional Assessments Import Wizard			
Create desktop shortcut			

2. This opens the wizard. In the **Introduction** window, it notifies you that the new WIOA data requirements are now included in new file formats. Click **Next**.



3. In the next window, New import session is selected by default, click Next.

Ne	w import session?
	In this screen you can choose to run a new import session or return to a previous session to continue with data correction or with the import operation itself.
	 New import session Process previous import session Cancel << Back Next >>

4. By default, the WIOA Import Formats is selected. Select Attendance Data from a 3rd party system (ATT) (1),

then click **Next** (2)

Sel	Select a Record				
	Select one of the records below for importing. The alphanumeric code identifies a unique record that is recognizable to TOPSpro Enterprise as published in: <i>TOPSpro Enterprise Import Specifications</i> . This wizard will perform a format validation routine after the import data file is specified.				
	Note: Importing any of these records can create new records in TOP	Spro Enterprise as well as update existing records.			
	If you have multiple files they should be imported in this order: 1. Personnel and User Data (PERS) 2. Class Data (CLS) 3. Demographic Data (DEM) 4. Student Program Status (SPS) / Entry (ENTR) / Attendance (ATT) / Test (TEST) / Student class status (SCS) / Update (UPDT) / HSE Exam Results (HSE) Data import in whatever order is preferred				
	Format Set				
	WIOA Import Formats	Old WIA Import Formats (not recommended)			
	 Personnel and User Data from a 3rd party system (PERS) Class Data from a 3rd party system (CLS) Demographic Data from a 3rd party system (DEM) Student Program Status from a 3rd party system (SPS) Entry Data from a 3rd party system (ENTR) 	 Attendance Data from a 3rd party system (ATT) Test Data from a 3rd party system (TEST) Student Class Status from a 3rd party system (SCS) Update Data from a 3rd party system (UPDT) High School Exam Results from a 3rd party system (HSE) 			
		Cancel << Back Next >>			

*For those who are still using eTests Desktop, you can choose the Old WIA format to import your test data.

5. Click on the **Browse** button (1) to locate the file you want to import (from computer hard drive, network drive, or external drive). Once you have selected the file, then click **Next** (2).

Se	lect import file
	Enter the name of your CSV import file. Or, click the Browse button to navigate to your file.
	Note that starting July 1st, 2016, the DBF and SDF file formats are no longer supported, and the CSV file format is the only one accepted.
	Click the Next button to continue.
	Filename - 3rd Party Attendance Data
	E:\Users\Administrator\Downloads\WIOA 3rd Party ATT_7050(Attendance).csv
	Cancel << Back Next >>

6. The next window is letting you know that the file you have chosen is ready to be processed. The recommended settings have already been selected, click **Next**.

Im	port Wizard
	The wizard is now ready to process the import data from the specified file.
	Import file name: E:\Users\Administrator\Downloads\WIOA 3rd Party ATT_7050(Attendance).csv.
	Note: Certain fields must be complete for TOPSpro Enterprise to accept the import dataset. The auto-populate checkbox(s) below are provided in case you do not want to manually enter missing information for critical fields.
	Check "When missing auto-populate required class names with ID values " if you would like missing class names to be derived from their identification codes. These values can be manually edited in TOPSpro Enterprise later.
	Check "Allow records with dates outside the current PY to be created" to enable the creation of date-bound records outside the current program year.
	Check "Automatically adjust class and/or program activity ranges" to allow the application to extend the activity ranges for class instances, and class and/or program enrollments when a student class or program record has a date outside the registered range.
	 When missing auto-populate required class names with ID values (recommended) Allow records with dates outside the current PY to be created (not recommended) Automatically adjust class and/or program activity ranges (recommended) Cancel << Back Next >>

7. The next window notifies you that the file was read successfully and there may be some records that are invalid. Click **Next**.



8. In the Edit Records window, you will be able to make the corrections to the invalid records or any records that require review. Clicking on a record that is invalid or requires review (1) will display a message at the bottom of the window (2) that explains why the record is invalid or requires review. To fix this record, click the Edit Records button in the bottom left hand area of the window (3).

Use the data grid to select one or more records to edit. Notice	Status	State	Ageno	y ID 🗢 Site I	D 🗢 Stud
the text box above the Edit Records button for any advisory message. Yellow records are cautionary while red records are	Invalid	1 alifornia	4908	11	555141083
	Invalid	California	4908	1	987459744
	Req Review	California	4908	1	308303438
invalid and must be fixed or they	Req Review	California	4908	1	903450983
will not be imported.	Req Review	California	4908	1	34903948
	Invalid	California	4908	1	432431243
To edit an individual record click	Req Review	California	4908	1	98538348
on any row and then click the	Req Review	California	4908	1	561677132
Edit Records button. To edit	Invalid	California	4908	1	893593875
multiple records you can first	Invalid	California	4908	1	938579834
select them with Ctrl-click and/or Shift-click using your mouse. To select all records click first on any row, then press Ctrl-a. Once	Req Review	California	4908	1	405933949
	Req Review	California	4908	2	60173003
	Req Review	California	4908	2	83173430
you've selected your records,	Req Review	California	4908	2	73146610
click the Edit Records button.	Req Review	California	4908	2	94193397
	Req Review	California	4908	2	21194049
After you've made any edits you wish to make click the Next button to continue.	Reg Review	California	4908	2	90181241
	Req Review	California	4908	2	54194048
	Req Review	California	4908	2	93193088
3	Req Review	California	4908	1	95898383
	Req Review	California	4908	1	984759387
	Reg Review	California	4908	4	599663101
Tatal seconds: 000	Invalid	California	4908	11	587789996
Total records: 889	Req Review	California	4908	1	987423598
Edit Records	Req Review	California	4908	1	987439875
Remove Records		=			

9. Check the boxes next to the information that you want to edit and make your changes. Once all of the corrections have been made, click Save.

le: 110
Class Code:
cription: 110
1

10. Once you have saved the edits, it will take you back to the edit records window showing that the invalid status has been cleared.

Status	State	Agency ID	Site ID	Student ID
	California	000123	01	544443236
Invalid	California	4908	11	518204444
Invalid	California	4908	11	595979585

11. Using the buttons at the bottom of the window can assist you with editing records in the import process. After clicking an of these buttons click *Next*.

Cancel	Save import session	Create Data Report	Load Existing Data	<< Back	Next >>

- **Save import session** creates a file that details the data you imported and can be used at a later date to make corrections to the records that may have been missed.
- Create Data Report will save the information in a PDF file hat will show a breakdown of the records in the import session
- Load Existing Data looks at all of the data already in TE and matches it with the student, class, or personnel id in the file to be imported. Clicking this button will populate the window with the existing data elements in TE.
- 12. TE is now ready to import the records that have been corrected. Click *Next*.

Ready to Import
There are 108 valid records the wizard will attempt to import into the TOPSpro Enterprise database.
Note: Even though a record is considered valid according to client-side validation it may conflict with a record at the server. If this occurs you will be informed about the number of records that could not be imported. You will also have the option to further correct data that could not be imported.
Click the Next button to start the import.
Cancel Save import session << Back Next >>

13. The Import Results window will appear with feedback of what was successfully imported. Click *Finish*.



2. Verifying & Editing Data

Objectives:

- 2.1. Use TE listers to find records
- 2.2. Explore and Edit Student Records

*** * ***



2.1. Use the TE Listers to find records

There are several selections included in the **Organization** and **Records** menus. These are the two menus in TE that include listers.

The **Organization** menu includes listers that pertain to the agency's organizational structure--featuring "container" records such as agency-site-class, features that help manage database security, and staffing related records.

The **Records** menu includes listers that contain more detailed student level information, such as student demographics, and specific fields that link a student with a class or program.

Each name in this menu indicates the specific information that it contains. For example, the selection under Organizations/Sites is the table that contains site records. If you go to Records/Tests, that is the table that contains a list of tests.

- Organization Records View Reports Tools Help TE Students Demographics Classes In program years Programs Records Tests Certificates Employment History Places of Employment
- 2.1.1. On the Records menu, point to Students, and then click In Program Years.





2.1.2. The Student In Program Years Lister will open.

2.1.3. The contents of the lister will then appear. Each row that you see represents an individual record. You can single-click anywhere on the row of the record to highlight it. Double-click anywhere on that row to open, view, or edit a record.

In Program Years	X				
New 🔋 4908 - Rolling H	ills Adult School 💌	Aggregated Σ	Subsites 🐮 Filter 🍸	Columns 🐻 Sort 💱	Delete 🔀
Program year	¢ Site	Student ID	Name	Birth Date	Gende
🔻 Current program year 🔀	т	т	т	Ŧ	Ŧ
7/1/2016 - 6/30/2017	02 - South Ca	005208242	Richard Williams	5/20/1986	Male
7/1/2016 - 6/30/2017	07 - Central Li	005208242	Richard Williams	5/20/1986	Male
7/1/2016 - 6/30/2017	01 - North Ca	023945893	Trayla B Ford	3/16/1987	Female
7/1/2016 - 6/30/2017	07 - Central Li	023945893	Trayla B Ford	3/16/1987	Female
7/1/2016 - 6/30/2017	01 - North Ca	034903948	Carmen Rodriguez	7/30/1957	Female
7/1/2016 - 6/30/2017	07 - Central Li	034903948	Carmen Rodriguez	7/30/1957	Female
7/1/2016 - 6/30/2017	01 - North Ca	039493489	John W Bestway	7/15/1987	Male
7/1/2016 - 6/30/2017	07 - Central Li	039493489	John W Bestway	7/15/1987	Male
7/1/2016 - 6/30/2017	02 - South Ca	045621382	Timothy McFlurry	4/5/1973	Male
7/1/2016 - 6/30/2017	01 - North Ca	049485858	Carey D McGarnagle	6/8/1988	Male
7/1/2016 - 6/30/2017	07 - Central Li	049485858	Carey D McGarnagle	6/8/1988	Male
7/1/2016 - 6/30/2017	01 - North Ca	090983439	Krissy Bartholomew	9/9/1984	Female
7/1/2016 - 6/30/2017	07 - Central Li	090983439	Krissy Bartholomew	9/9/1984	Female
/1/2016 - 6/30/2017	01 - North Ca	091919119	Karen V Corkey	7/13/1987	Female
7/1/2016 - 6/30/2017	07 - Central Li	091919119	Karen V Corkey	7/13/1987	Female
7/1/2016 - 6/30/2017	01 - North Ca	092340934	Humil Zritpab	5/25/1994	Female

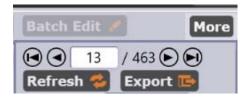
2.1.4. Notice the action buttons on the lister toolbar at the top of your screen.



2.1.5. Locate additional buttons by clicking the **More** button to the right of the other action buttons.

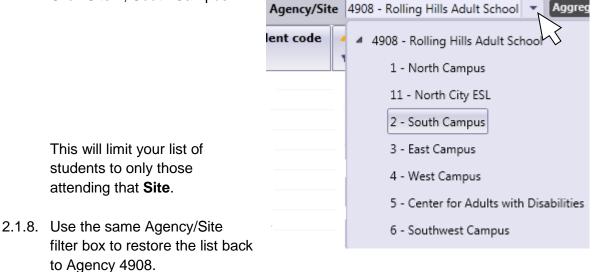


2.1.6. You can quickly view the number of students in the lister by looking at the figure at the top. In this example, there are 463 records in the Lister.





2.1.7. You can limit your Lister display to a particular Site by using the **Site** filter box. Click the arrow to the right of the **Agency/Site** filter box. A drop-box will open. Click Site 2, South Campus.



2.1.9. Use the **Filter, Columns**, and **Sort** buttons to organize the display of your lister.



• **Filter** allows you to limit your lister display only records that meet specific criteria that you select.

Filter	🍸 Columns 🕅 Sort 🖞 Delete 🗙 🕢 1 / 337 🕑 🕢 Refresh 😸 Export 📴 3rd Party
AND	Program Years Current program year
Filter:	AND OR NOT
	Contact
	Address ContactID Email Fax Mobile Name Phone
	Program Year
	Aggregated Class Status Certificates Class Enrollments Class Records Employment History Program Enrollments
	Program Records Records Services Previously Received Services Received in Program
	Supported Services Needs Assessment Supported Services Received in Program Tests
	Student
	Age Birth Date Consent Status Encoded ID Ethnicity Fake Status Gender ID Native Language Races
	Sites
	Demographic History
	Highest Degree or Diploma Highest Degree or Diploma Earned outside US Highest Year of School
	Highest Year of School outside US Name
	Consumer
	Communications Disabilities Primary Disability Special Needs Status Strengths

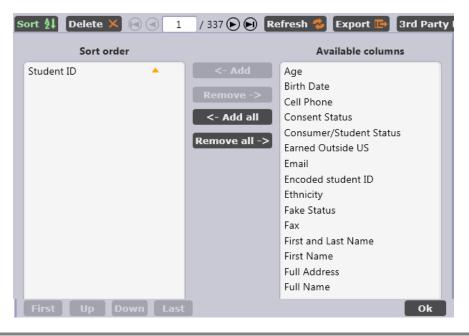




• **Columns** enables you to select and de-select which columns will display in your lister.

Columns 📰 Sort 🗍 Delete	× @ @ 1 /	337 🕞 💽 Refresh 参 Export
Selected columns		Available columns
Program year	<- Add	Age
Site	Remove ->	Cell Phone
Student ID		Consent Status
Full Name	<- Add all	Consumer/Student Status
Birth Date	Remove all ->	Earned Outside US
Gender	Keniove an ->	Email
		Encoded student ID
		Ethnicity
		Fake Status
		Fax
		First and Last Name
		First Name
		Full Address
		Highest Degree or Diploma
		Highest Year of School
		Last and First Name
		Last Name
		Middle Name
		Native Language
		Phone
		Races
		School Outside US
First Up Down Last		Ok

• **Sort** is where you designate which field determines the display order of your lister, for example the screen shot below shows a lister sorted numerically by Student ID.



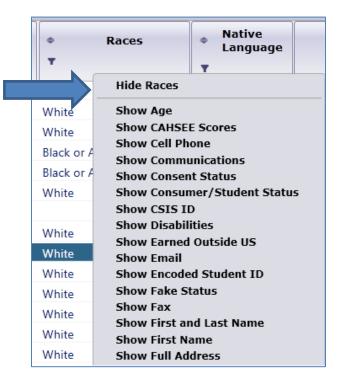




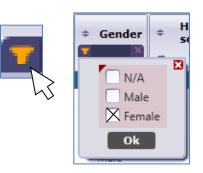
2.2. Filter, Sort, and Select Columns in TE Listers

TE also provides users with simple options to quickly retrieve information, and to customize listers to display preferred fields.

- 2.2.1. On the **Records** menu, point to **Students**, and then click **Demographics**.
- 2.2.2. Right click on the column header for **Races**. Click **Hide Races** to remove this column.
- 2.2.3. Performing this enables you to hide the column you selected or add additional fields.
- 2.2.4. Repeat the steps by right-clicking **Ethnicity** and also removing that column from the lister.



- 2.2.5. Now, we want to add a new column instead of subtracting an existing one. Rightclick the grey space to the right of the lister columns. This generates a list of columns that you can add. Select **Show Age**.
- 2.2.6. On the **Gender** column, click the **Add Filter** icon to open the filter box for that column. Check **Female**.



2.2.7. Click the same icon in the **Age** column, and type in the age range of 33 to 43, as in the graphic below. Click **OK**.







- 2.2.8. You now have a filtered list of all female students from the age of 33 to 43.
- 2.2.9. Click the **Add Sort** icon in the **Age** column. This arranges the list in order from age 33 to 43. Clicking a second arranges it in reverse—from 43 to 33.



2.2.10. Click the red "X" in both the **Age** and **Gender** columns to restore back to the full list of students.

EXERCISE 2.1

1.	How many Current Students are there in Rolling Hills Adult School?
2.	How many Current Students are there in Site 11 North City ESL?
3.	What is the Student ID for Marlon Sneed?
4.	Which Student is assigned ID 599661101?
5.	Which Student in Site 11 North City ESL has the earliest Date of Birth?
6.	How many Female Students are there in the program year at Rolling Hills between the ages of 23 and 29?
7.	How many students enrolled in Site 2, South Campus with native language of Spanish?



2.3 Explore and edit student records

The **Student Demographic** record is the "parent" record for all other learner-related records, such as **In Program Years, Test, and Class Enrollment records** (which are all "child" records.) The foundation for the **Student Demographic** record is the **Student Identification** (ID) number, which provides the common element that links all of the records assigned to the student, and supplies the minimum information TE needs to create a Student Demographic record.

- 2.3.1 On the Records menu, point to Students, and then click Demographics,
- 2.3.2 Find the record for the student Acuna, Rosalina, by clicking the **Filter** icon in the **Name** field and searching for Acuna. (Note: be careful how you set up this filter.)

Students demographics 🛛 🛛						
New 🐚 Agency/Sit	e 4908 - Rolling Hills Adult School					
Student code	Name					
T	🔻 acuna 🗙					
913425098	Rosalina Acuna					

- 2.3.3 Open the record for Rosalina Acuna by double-clicking anywhere on the row of that record.
- 2.3.4 The **Student Information** tab should open.



Do a guided tour of Rosalina's records.



- 2.3.5 View the **Navigator** section of this window on the left-hand side. It opens to **Edit/View**, which enables you to edit and view Rosalina's personal student demographics information. **Edit/View** contains the "parent record" data for the student record, while the other selections on the **Navigator** bar represent "child records."
- 2.3.6 Clicking the different options on the Navigator panel provides views of a variety of information about that student.
- 2.3.7 **In Program Years** displays the years in which Rosalina has dated activity in the database.

Navigator 📮
Edit / View
In Program Years
Student Records
Class Enrollments
Class Records
Program Enrollments
Program Records
Tests
Certificates
Demographic History
Employment History



2.3.8 **Student Records** displays a list of all of the dated activity that occurred for Rosalina during the year.

TE <u>V</u> iew <u>O</u> rganization Re	ecord <u>s R</u> eports <u>T</u> ools <u>H</u> elp	User: Administ	rator 23 Version: 3.0 build 17 🕐 🗖 🖬 🔀					
Demographics 9134250	98 - Rosali 関		Pages					
Navigator 🔲	New 🔋 Save 🛒 Cancel 🥘 Delete 🗶	Duplicate 😫 🕢 🤇 1 / 2 🗩 😥 Go To I	inked 🚥 Disconnect 🍠 🛛 More					
Edit / View	Student Information	Student Information						
In Program Years	Agency/Site: 4908 / 01 - North Campus	Agency/Site: 4908 / 01 - North Campus						
Student Records	Student: 913425098 / Rosalina Acuna Bir	Student: 913425098 / Rosalina Acuna Birth Date: 5/9/1991 Gender: Female						
Class Enrollments	Add Entry/Update Record							
Class Records	Student Records							
Program Enrollments	New 🖹 Filter 🍸 Columns 📰 Sort 🖗	Delete 🗶 Batch Delete 😕 Batch Edit 🖉	1 / 4 🕞 🕞 🛛 More					
Program Records	Student	Record Labor Primary	Instructional					
Tests	J Site J ID Vame	Date + Force Goals	Levels					
Certificates	Y Y Y	т. _т т.	Y Y					
Demographic History	01 - N 913425098 Rosalina Acuna	12/12/2016	Basic Skills (ABE) Entered job training					
Employment History	01 - N 913425098 Rosalina Acuna	12/10/2016						
	01 - N 913425098 Rosalina Acuna	9/1/2016	During the capital					
	01 - N 913425098 Rosalina Acuna	8/25/2016 Unemployed Get a Job	Basic Skills (ABE)					





2.3.9 **Class Enrollments** lists each class in which the student is enrolled. This list will only include one listing for each class.

Navigator	D New D Sa	ve 🗐 Cancel (🖉 Delete 🗶 Duplicate	1	/ 2 🕞 🕒 😡 Go To Lini	ked 🚥 🛛
Edit / View	💽 Studen	t Information				
In Program Years	Agency/Site:	4908 / 01 - Nort	h Campus			
Student Records	Student:	913425098 / Ros	alina Acuna Birth Date: 5/	9/1991 Gender	: Female	
Class Enrollments	Add Entry/U	Update Record				
Class Records	Class Enro	llments				
Program Enrollments	New 🗎 Fi	ilter 🍸 Colun	nns 🔳 Sort 👭 Delete	× Batch Dele	te 🦄 🛛 Batch Edit 🥒	9.9 1
Program Records	⇒ Site	Student ID	⇒ Name	÷ Class	¢ Class	Name
Tests Certificates	т	-	Ŧ	T	Ŧ	
Demographic History	01 - North	913425098	Rosalina Acuna	1	Low Intermediate ABE	
Employment History						

2.3.10 **Class Records** shows all class related activity for the student. This section includes separate records for all data activity related to the class.

Navigator	D New D Sa	ve 🗮 Cancel (2 Delete 🗙 Duplicate		/200	Go To Linked 📟 🛛 Disc		
Edit / View	Studen	t Information						
In Program Years	Agency/Site:	Agency/Site: 4908 / 01 - North Campus						
Student Records	Student:	913425098 / Ros	alina Acuna Birth Date: 5/	/9/1991 Gender:	Female			
Class Enrollments	Add Entry/	Add Entry/Update Record						
Class Records	Class Reco	Class Records						
Program Enrollments	New D F	ilter 🍸 Colum	nns 🔟 Sort 21 Delete	× Batch Delete	Batch	Edit / R C 1		
Program Records		Student		Record	Class			
Tests	• Site	° ID	• Name	Date	ID	Class nan		
Certificates		T	1. Y	T	Ŧ	T.		
Demographic History	01 - North	913425098	Rosalina Acuna	12/12/2016	1	Low Intermediate ABE		
	01 - North	913425098	Rosalina Acuna	12/10/2016	1	Low Intermediate ABE		
Employment History	01 - North	913425098	Rosalina Acuna	9/1/2016	1	Low Intermediate ABE		
	01 - North	913425098	Rosalina Acuna	8/25/2016		Low Intermediate ABE		

2.3.11 **Program Enrollments** lists each program in which the student is enrolled. This section will only include one listing for each program.

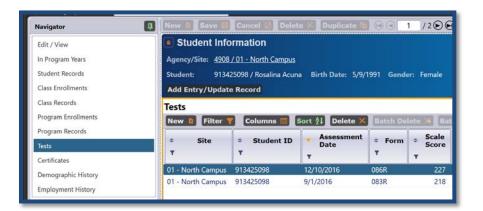


Navigator	📮 New 🐧 Save	Cancel Ø	Delete 🗶 Duplicate	🛅 🕞 🕘 📘 🖊 2 🕞 💽 🖉				
Edit / View	Student I	nformation						
In Program Years	Agency/Site: 4	Agency/Site: 4908 / 01 - North Campus						
Student Records	Student: 9	13425098 / Rosali	na Acuna Birth Date: 5/	9/1991 Gender: Female				
Class Enrollments	Add Entry/Up	Add Entry/Update Record						
Class Records	Program En	ollments						
Program Enrollments	New B Filte		s 🔟 Sort ી Delete 🕯	🗙 🛛 Batch Delete 🤉 🖬 Batch i				
Program Records		Ì						
Tests	• Site	 Student ID 	Name	 Instructional Program 				
Certificates	•	T	T	Ŧ				
Demographic History	01 - North Ca	913425098	Rosalina Acuna	Basic Skills (ABE)				

2.3.12 **Program Records** shows all program related activity for the student. This includes separate records for all data activity related to the program.

Navigator	D New D Save R Ca	ncel 🥥 D	elete 🗶 🛛 Duplicate		🖲 Go To Linked 🤐 Disconi			
Edit / View	Student Information	ation						
In Program Years	Agency/Site: 4908 / 01	Agency/Site: <u>4908 / 01 - North Campus</u>						
Student Records	Student: 91342509	8 / Rosalina A	cuna Birth Date: 5	5/9/1991 Gender: Female				
Class Enrollments	Add Entry/Update Re	cord						
Class Records	Program Records							
Program Enrollments		Columns 🔳	Sort 21 Delete	🗙 Batch Delete 💥 Ba	itch Edit 🖊 🛞 🛞 🚺 / 4			
Program Records		1			Instructional			
Tests	Program Year	Site	Student ID	Name	Program			
Certificates	T	T	T	T	T			
Certificates	7/1/2016 - 6/30/2017	01 - N	913425098	Rosalina Acuna	Basic Skills (ABE)			
and the second		01 - N., 913425098 Rosalina Acuna Basic Skills		Basic Skills (ABE)				
Demographic History	7/1/2016 - 6/30/2017	01 - 11						
Demographic History Employment History	7/1/2016 - 6/30/2017 7/1/2016 - 6/30/2017	01 - N	913425098	Rosalina Acuna	Basic Skills (ABE)			

2.3.13 Tests displays Rosalina's tests.



2.3.14 Return to **Edit/View**.





2.3.15 Click the Edit icon. This opens the Edit/View screen for editing.



- 2.3.16 In Identification, find the Date of Birth field.
- 2.3.17 Change Rosalina's date of birth from 5/9/1991 to 5/9/1992.



2.3.18 Click **Save**.

EXERCISE 2.2

1.	What is Rosalina Acuna's Date of Birth ?
2.	What is Rosalina's Native Language ?
3.	How many Test records does Rosalina have for PY 2016-17?
4.	What is Rosalina's Secondary Attainable Goal?
5.	What is the Highest Year of School Completed for John W. Bestway?
6.	[ADVANCED] On what date was John's first Update completed?
7.	[ADVANCED] How many different programs is Chuckie Garcia enrolled for 2016-17? How many classes?
	Congratulations!
You	have successfully explored, edited, and designed student records in TE.

explored, edited, and designed student records in TE. tou nave successfully





3. Manual Data Entry

Objectives:

- 3.1 Enter Student Demographics
- 3.2 Create a Class and a Teacher

3.1. Enter Student Demographics

- 3.1.1 On the **Records** menu, point to **Students**, and select **Demographics**.
- 3.1.2 Click the **New** icon.



- 3.1.3 Enter information for the new student as it appears in the graphic on the next page.
- 3.1.4 When finished, click **Save**.
- 3.1.5 Return to the Student Demographics lister.
- 3.1.6 Click the **Add Filter** icon **T** in the **Student ID** column and type in the Student ID 555778989. Click OK.



Click on the Filter button

Filter 🝸 a

and remove filter for "Current Program Year" and

press OK. The new student demographics record for Elvin Miles should now appear.







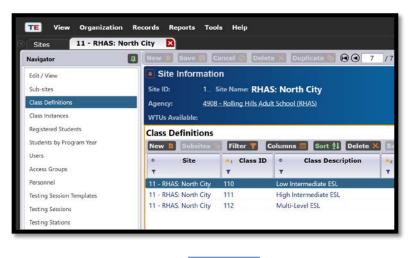
	E View	v Organizat	ition Recor	ords Reports	Tools He	elp					User: Adminis
<u>.</u>	Demograph	nics 📭	New Studen	nt 🛛							
			ancel 🧭 De	elete 🗙 Duplic	ate la 💽	New / 46	64 🕞 🕞 🚺	Go To Linke	ed 😄 Discon	nnect 🥖 S	Section List 📜
Navigator	_	ent Informa	ation								
Ŷ		te: 4908 - Rol		It School							
	Student:	555778989			Birth	h Date: 1/21/19	987	Gender: N	V/A		
		elect Site									
	Site: 4908	- Rolling Hills	Adult School	-							
	🔺 🛃 Id	entification	1								ļ
	Student ID	555778989	39		Is Fake:	No					
	Title:			me: Elvin		7	Mic	ddle Name: [Last	Name: Miles
	Gender:	Unknown	-	Birth Date: 1/21	L/1987	-					
	SSN:]	Consent: Unk	known 💌		NED	OP ID:		SS	SID:
	GED 2002 1	ID: E	É.	GED 2014 ID:			HiSF	ET ID:		т/	ASC ID:
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				ollege, no degree	_		I				
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gator	GED 2014 S	scores:		GED 200	2 Scores:						ſ
	Subsection	Date Score	Passed Non	-English Subsectio	on Date Sc	ore Passed No	on-English				
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	Subsection	Date Score	Passed Non	-English Subsecti	on Date Sc	core Passed No	on-English				
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	🔹 🖍 Eth	hnicity, Race	e & Langua	ge							
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		Hispanic or			_	Chinese	O Haitian		French Portuguese	O Panjabi	O Burmese C
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	Phone:		7	Fax:				Email:	emiles@zmail.co	om	



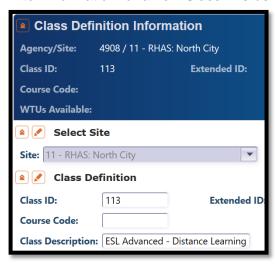


3.2. Create a Class and Assign a Teacher

- 3.2.1 On the **Organization** menu, click **Sites**.
- 3.2.2 Open the record for **Site 11 North City**.
- 3.2.3 On the Navigator bar, click **Class Definitions**.



- 3.2.4 Click the New icon. New In
- 3.2.5 Enter information for a new Class 113 using the data in the graphic below.





- 3.2.6 Click **Save**. Notice that additional selections appear on the **Navigator** bar.
- 3.2.7 On the Navigator bar, click **Class Instances**.

Navigator 📮					
Edit / View					
Class Instances					
Class Enrollments					
Class Records					
Teachers					

- 3.2.8 Click the (lower) **New** icon.
- 3.2.9 Enter the information using the following information:

Select Class Definition						
Class Definition:	Site:		11 - RHAS: North City			
	Program Year:		7/1/2016 - 6/30/2017 (Current)			
	Class Definition:		113 - ESL Advanced - Distance Learning			
Class Instance						
Class Start Date:	7/1/2016 Class End Date: 6/30/2017					
Instructional Pro	grams:	○ N/A	High School Diploma Adults w/D	isabilities		
		Basic Skills (ABE)	E) HSE Adults supp	oorting K12 studen		
		SL/ELL Career and Technical Education (CTE) Other Program		ram		
		Citizenship	Workforce Readiness ROCP			
Special Programs:		None	🗌 Homeless Program 📃 Special Needs	Even Start		
		EL Civics (IELCE)) Family Literacy Alternative Ed. [K12]	CBET		
		🔲 Jail	🗌 Workplace Ed. 🛛 🗌 Non-traditional Trainii	ng 🗌 Other		
		Community Corr	rrections 🗌 Tutoring 📃 Older Adults			
		State Corrections	ns 🔽 Distance Learning 🗌 Carl Perkins			

3.2.10 Click **Save.** Again, new selections appear on the **Navigator** bar. Now we will add a couple of students and a teacher to this new class.

3.2.11 On the Navigator bar, click Class Enrollments.

- 3.2.12 Click New.
- 3.2.13 Open the **Student** drop-down menu.



Select Student in Program Year							
Student:	Site:	11 - RHAS: North City					
	Program Year:	7/1/2016 - 6/30/2017 (Current)					
	Student:	No selection					
	Class Instance:	501161426 Leo Alcazar	11 - RHAS: North City				
Status in Class		502162564 Pedro Altamirano 508990089 David Vega	11 - RHAS: North City 11 - RHAS: North City	=			
Date Entered Class: 2/1/2017		510510043 Darius Doha 511151043 Shoufu Wu	11 - RHAS: North City 11 - RHAS: North City				
Class Stat	us: (N/A Active	511156803 Roberto Araiza 512333731 Veronica Lopez	11 - RHAS: North City 11 - RHAS: North City				
		514977730 Lena Lukashuk Clear selection Select from SubSites I Filter by program					

- 3.2.14 Select student David Vega and click **Save.** Repeat the same process with student Lena Lukashuk.
- 3.2.15 Return to the Class Instance Record and click **Class Enrollments.** Note that these two students now appear in this lister.

New 🐚 Agency/Site 11 - North City ESL 🔻 Aggregated ∑ Subsites 🐌 Filter 🍸 Columns 🔤 Sort 🔱 Delete 🗙 🚱 🥥 2 / 2 🕟						
Program year	Student code	* Name	* Site	Class code	Class name	
T	т	T	т	Ŧ	T	
7/1/2012 - 6/30/2013	514977730	Lena Lukashuk	11 - North City ESL	113	ESL Advanced - Dist	
7/1/2012 - 6/30/2013	508990089	David Vega	11 - North City ESL	113	ESL Advanced - Dist	

- 3.2.16 Click the open tab for the class definition record you originally created for Class 113.
- 3.2.17 On the Navigator bar, click Teachers.
- 3.2.18 Click the (lower) New icon.
- 3.2.19 Enter new teacher information based on the graphic on the next page.



Functional Role Information								
Container: 4908 / 11 - North City ESL								
Class Description: 113 - ESL Advanced - Distance Learning								
Personnel: 1110 - Elisa Askew								
🔺 🖍 Sel	ect Personnel							
Personnel:	Personnel: Container: 11 - Nor		th City ESL	•				
	Personnel:	1110 - E	lisa Askew	•				
🔺 🛃 Sel	ect container/ass	ociation	s for role		,			
Container:	Container: 11 - North City ESL							
	Class Definition:	113 - ES	L Advanced - Distance	e Learning				
	Special Program:	No selec	tion	-				
🕿 💉 Rol	Role Identification							
Functional	Role:		 Administrator Teacher 					
Start Date:			7/01/2016					
End Date:		6/30/2019						
Role is Related to Instructional Program:		• N/A	High School Diploma	Adults w/Disabilities	Other Program			
			Basic Skills (ABE)	GED GED	 Health & Safety 	■ ROCP		
			ESL	Spanish GED	Home Economics			
			ESL/Citizenship	Career/Tech Ed	Parent Education			
			Citizenship	Workforce Readiness	Older Adults			

3.2.20 Click Save.

3.2.21 On the Pages tab, click Close All Pages.

