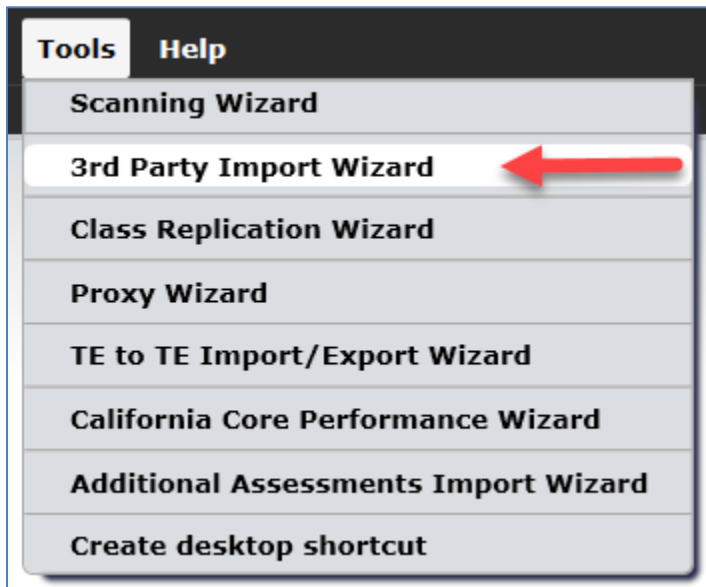


# Using the 3<sup>rd</sup> Party Import Wizard

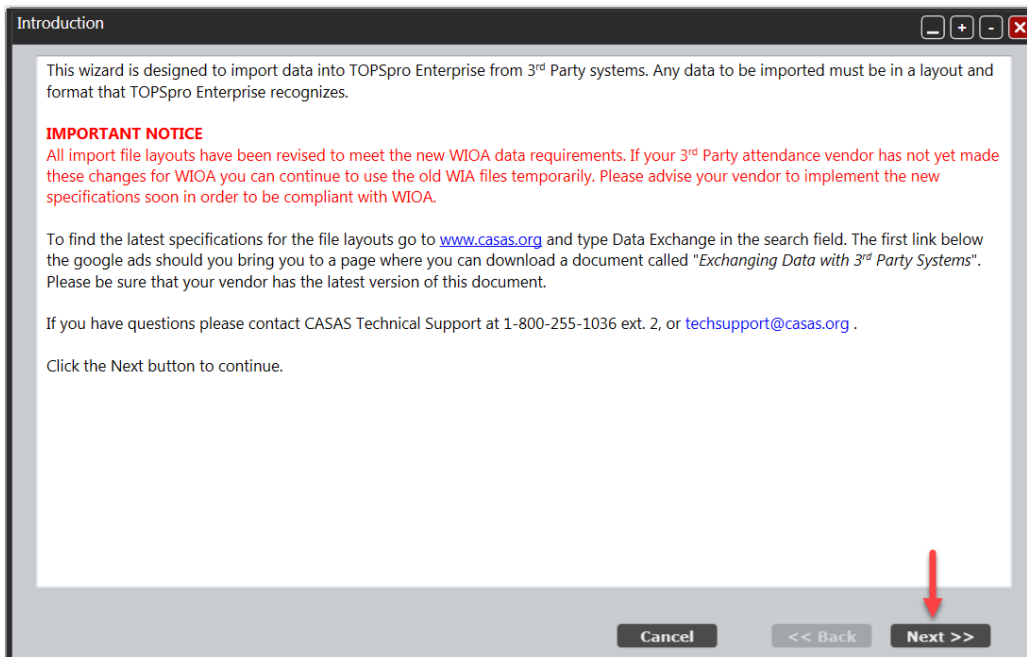
The 3<sup>rd</sup> Party Import Wizard has been updated with the new WIOA format and now enables you to import **Attendance Hours, Class Data, Demographic Data, Entry Data, High School Exam Results, Personnel and User Data, Student Class Status, Student Program Status, Test Data, and Update Data** files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

This exercise details how to import Attendance Hours from 3<sup>rd</sup> Party export file.

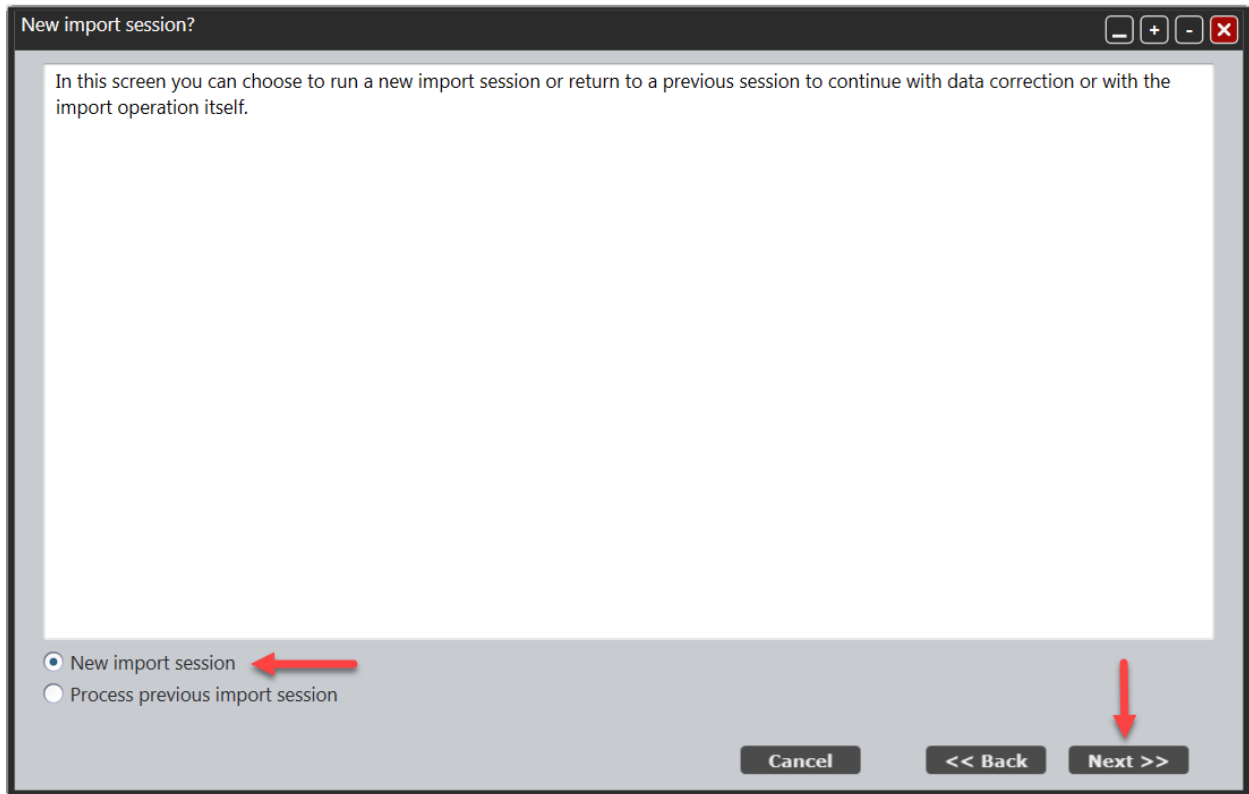
1. On the Tools menu, select **3<sup>rd</sup> Party Import Wizard**



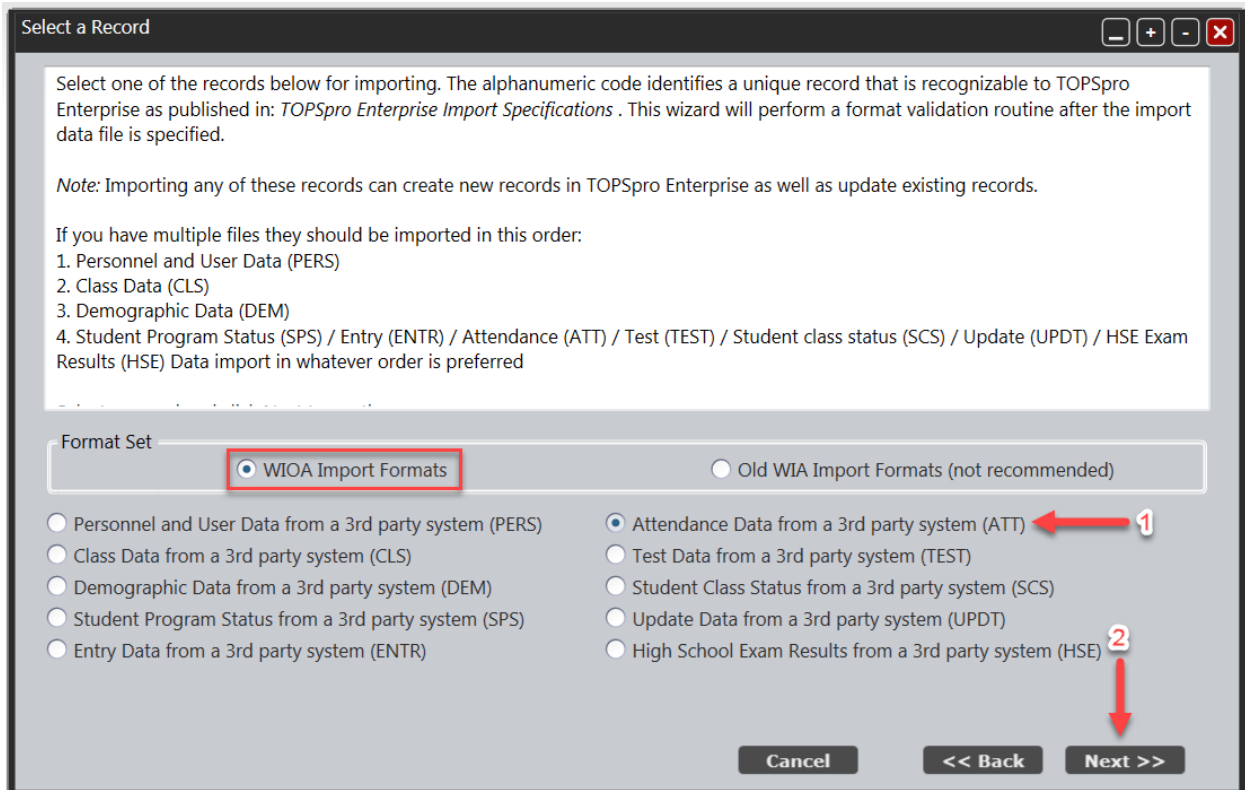
2. This opens the wizard. In the **Introduction** window, it notifies you that the new WIOA data requirements are now included in new file formats. Click **Next**.



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

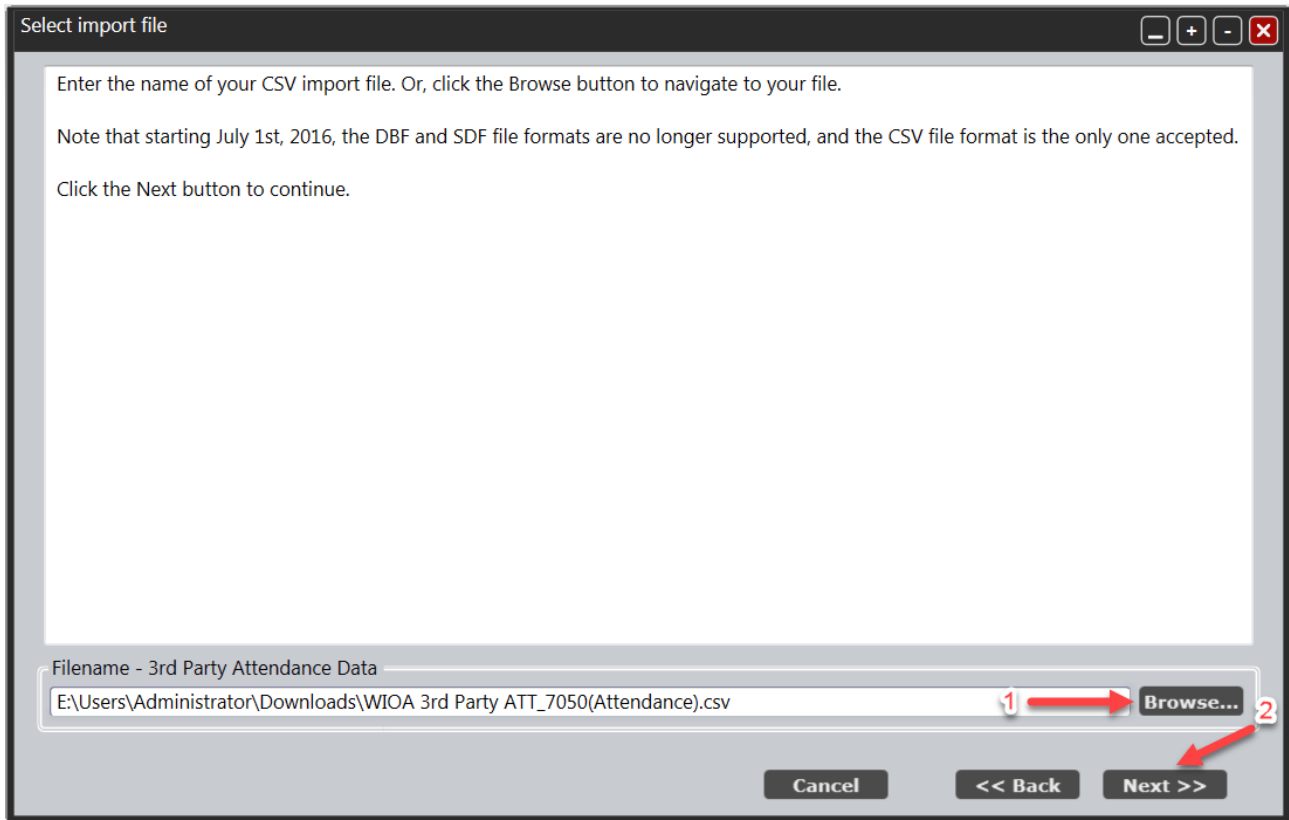


4. By default, the **WIOA Import Formats** is selected. Select **Attendance Data from a 3<sup>rd</sup> party system (ATT)** (1), then click **Next** (2)

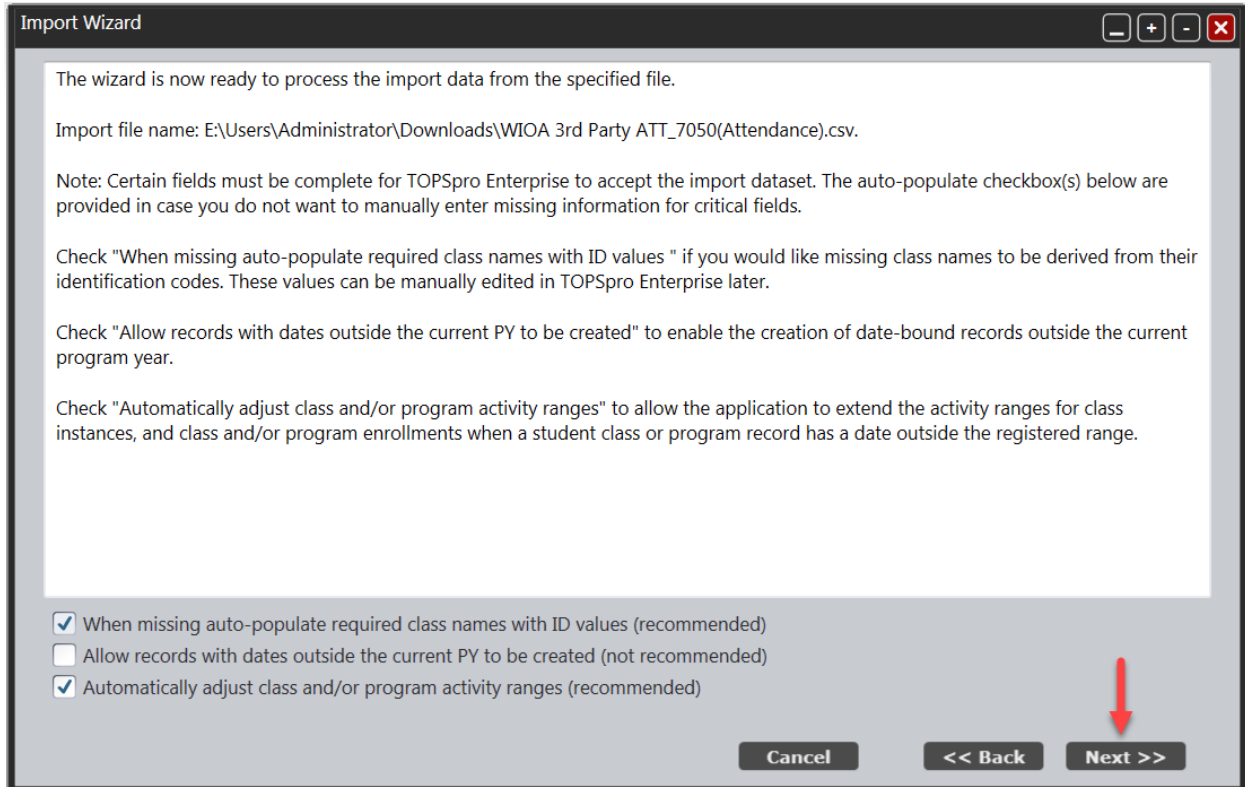


**\*For those who are still using eTests Desktop, you can choose the Old WIA format to import your test data.**

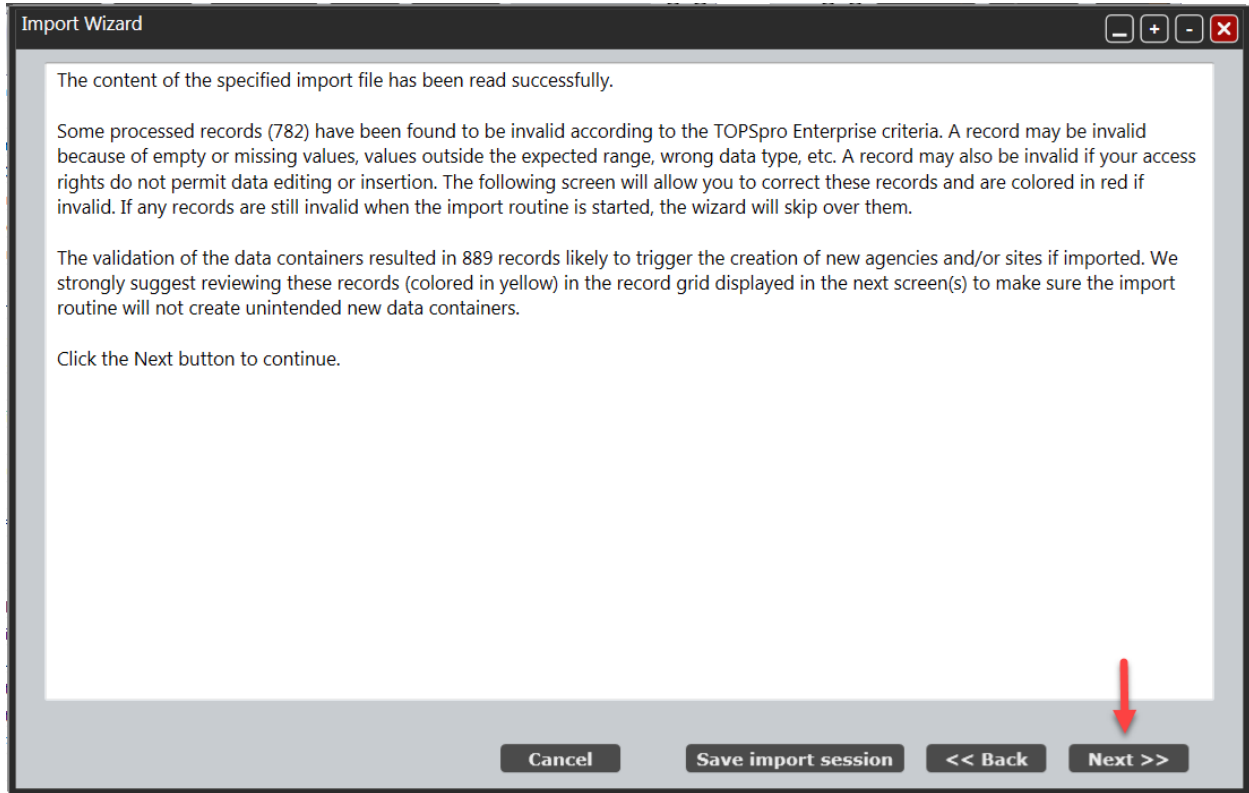
5. Click on the **Browse** button (1) to locate the file you want to import (from computer hard drive, network drive, or external drive). Once you have selected the file, then click **Next** (2).



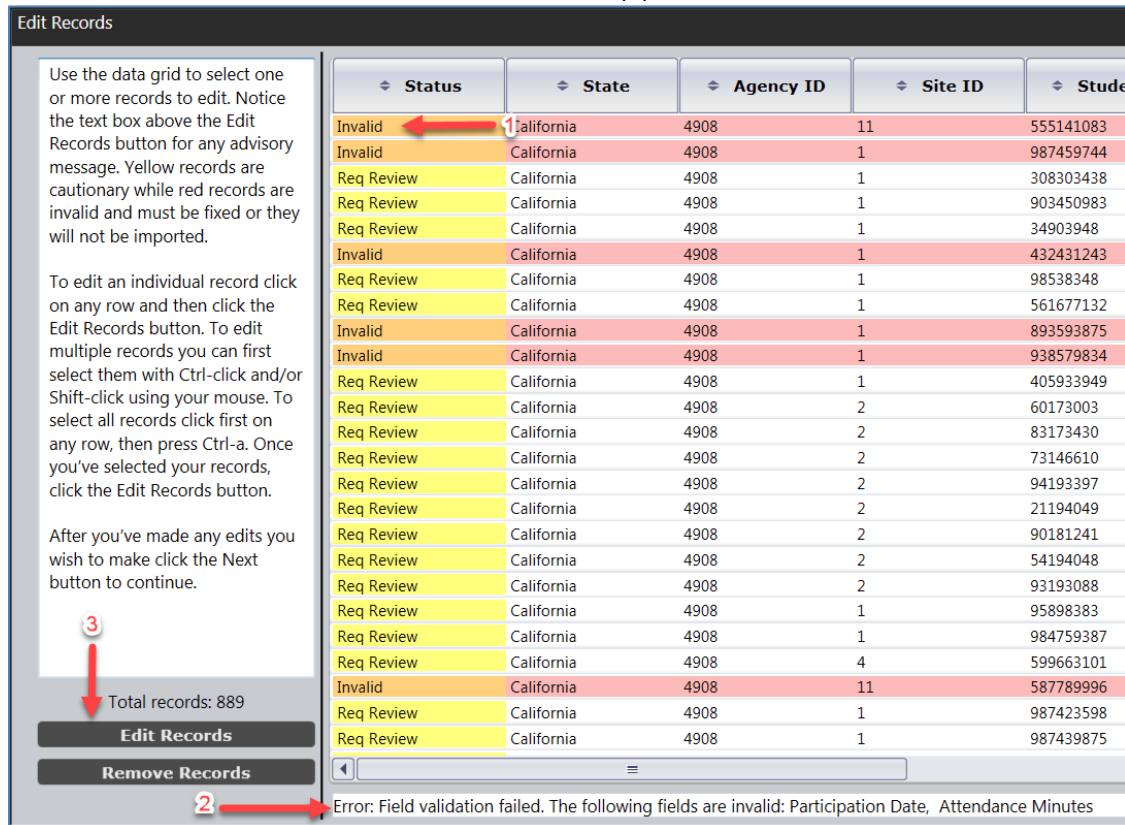
6. The next window is letting you know that the file you have chosen is ready to be processed. The recommended settings have already been selected, click **Next**.



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



- 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).



- 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.

**Data Correction Edit Window**

Select the fields that you want to change and then select their new values.  
You might need to scroll down to see all fields.

State:  California

Agency:  000123 - CASAS DEMO - Yearly PY

Site:  000123 / 126 / 01 - Sub-Site 1

Class:  New

Class Code: 110

Extended Class Code:

Class Description: 110

Student ID:  544443236

First Name:

Middle Name:

Last Name:

Participation Date:  4/26/2017


Attendance Minutes:  87

Participation Source:  Student Update

Class Start Date:


Class End Date:

**Save** **Cancel**

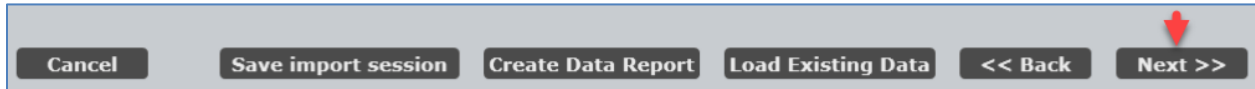


- Once you have saved the edits, it will take you back to the edit records window showing that the invalid status has been cleared.

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

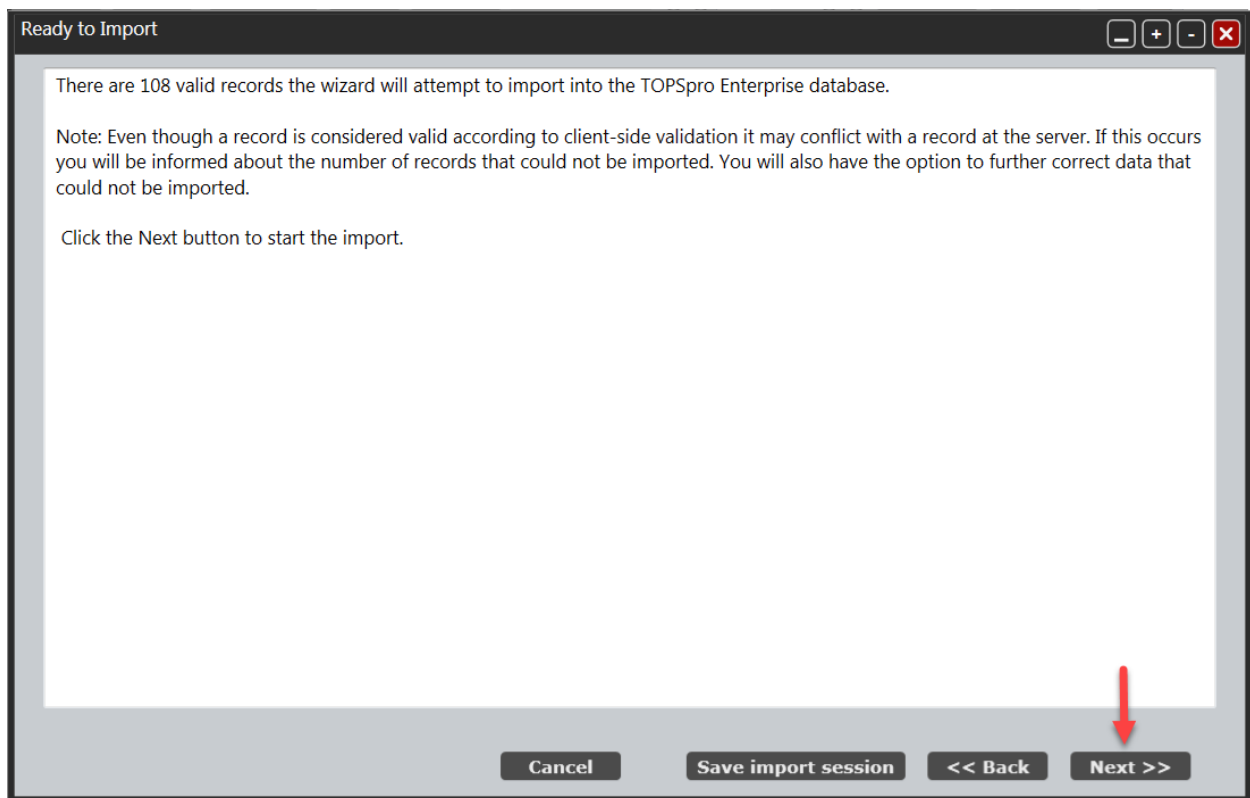


11. Using the buttons at the bottom of the window can assist you with editing records in the import process. After clicking an of these buttons click **Next**.



- **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**.



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

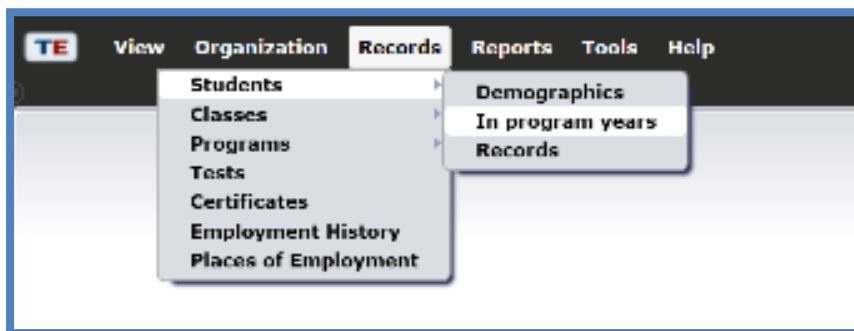
There are several selections included in the **Organization** and **Records** menus. These are the two menus in TE that include listers.

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.

- 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.

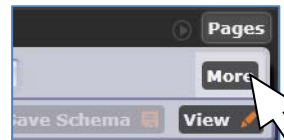
2.1.3. The contents of the lister will then appear. Each row that you see represents an individual record. You can single-click anywhere on the row of the record to highlight it. Double-click anywhere on that row to open, view, or edit a record.

Program year	Site	Student ID	Name	Birth Date	Gender
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
7/1/2016 - 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.

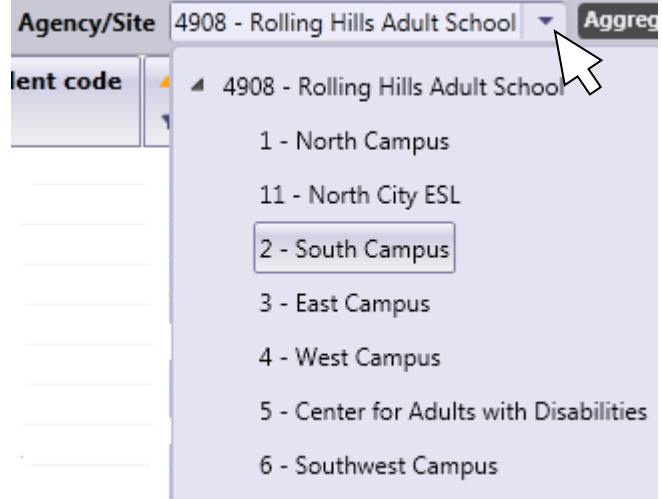


2.1.6. You can quickly view the number of students in the lister by looking at the figure at the top. In this example, there are 463 records in the Lister.





- 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.



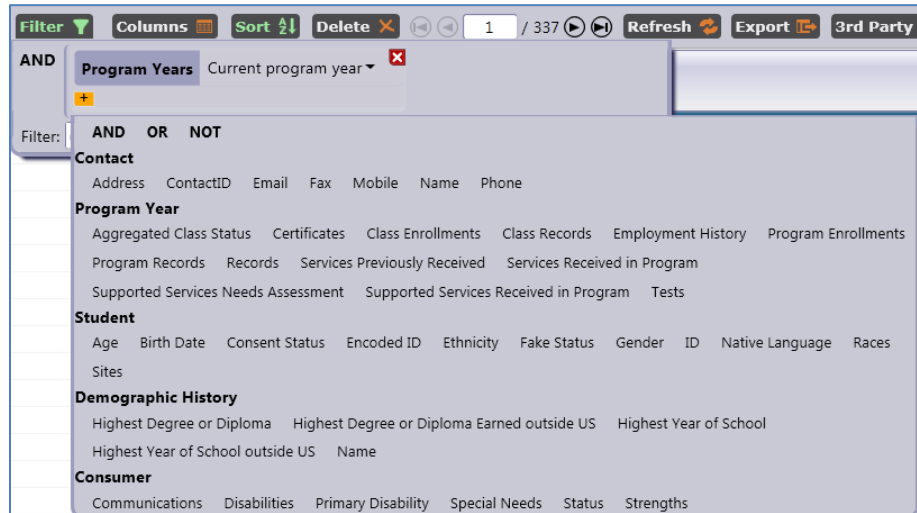
This will limit your list of students to only those attending that **Site**.

- 2.1.8. Use the same Agency/Site filter box to restore the list back to Agency 4908.

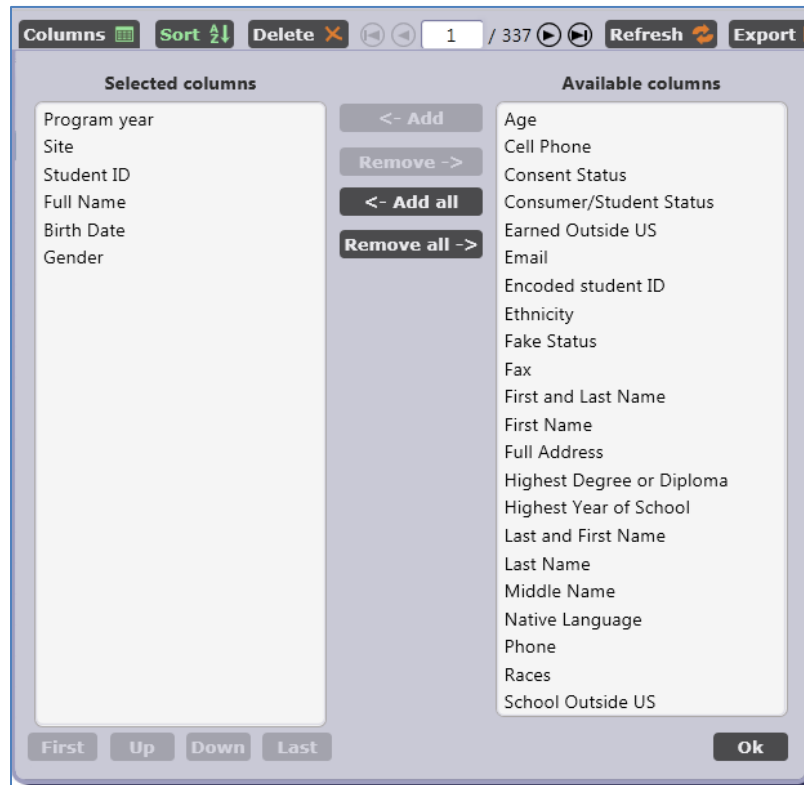
- 2.1.9. Use the **Filter**, **Columns**, and **Sort** buttons to organize the display of your lister.



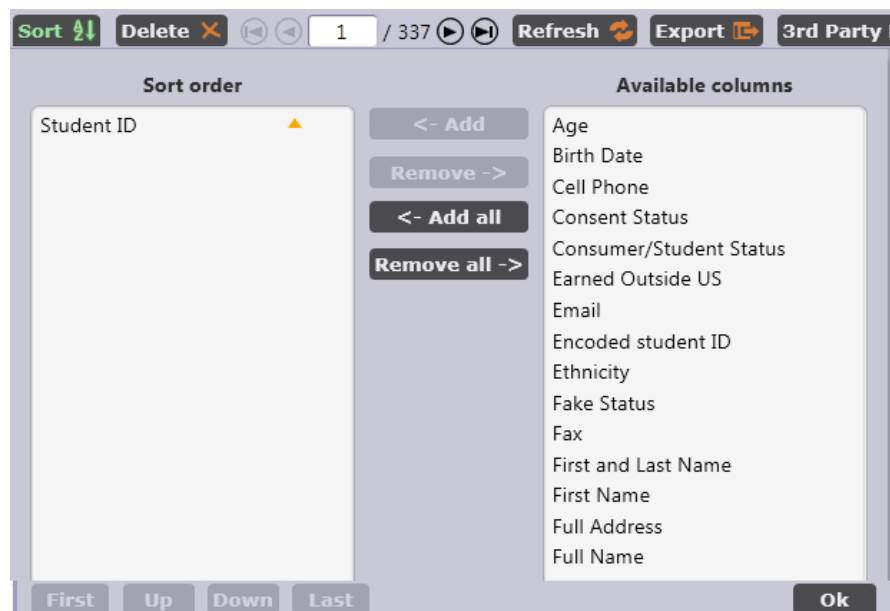
- **Filter** allows you to limit your lister display only records that meet specific criteria that you select.



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



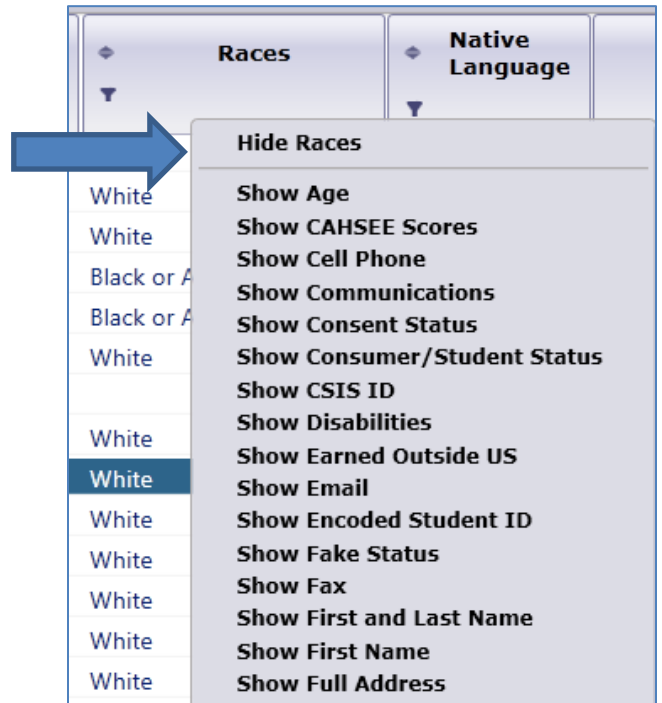
- **Sort** is where you designate which field determines the display order of your lister, for example the screen shot below shows a lister sorted numerically by Student ID.



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

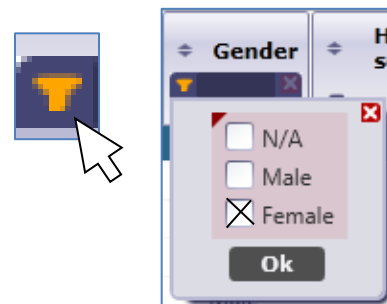
TE also provides users with simple options to quickly retrieve information, and to customize listers to display preferred fields.

- 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. Right-click 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**? \_\_\_\_\_

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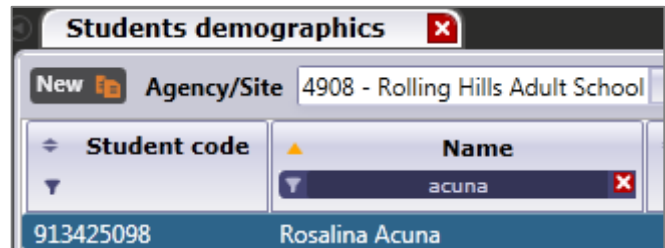
6. How many **Female Students** are there in the program year at Rolling Hills between the ages of 23 and 29? \_\_\_\_\_
7. How many students enrolled in Site 2, South Campus with native language of Spanish? \_\_\_\_\_

## 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.

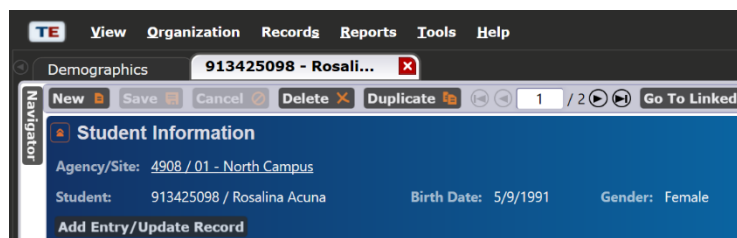
2.3.1 On the **Records** menu, point to **Students**, and then click **Demographics**,

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.)



2.3.3 Open the record for Rosalina Acuna by double-clicking anywhere on the row of that record.

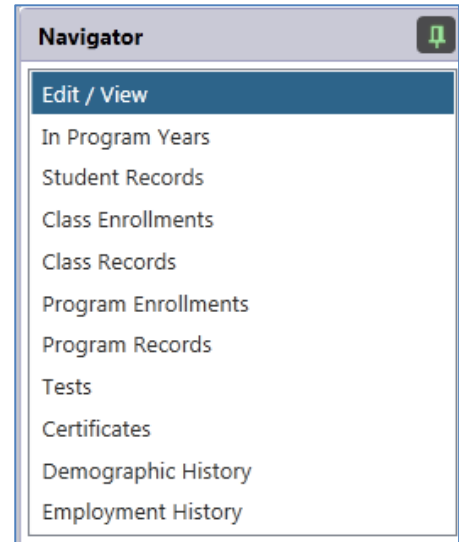
2.3.4 The **Student Information** tab should open.



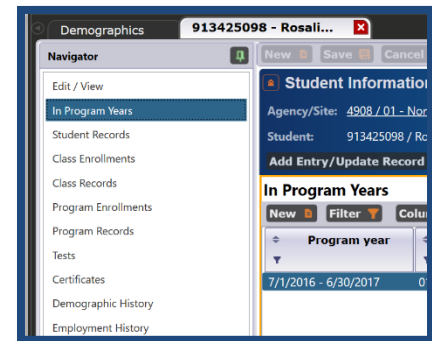
**Do a guided tour of Rosalina's records.**

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.”

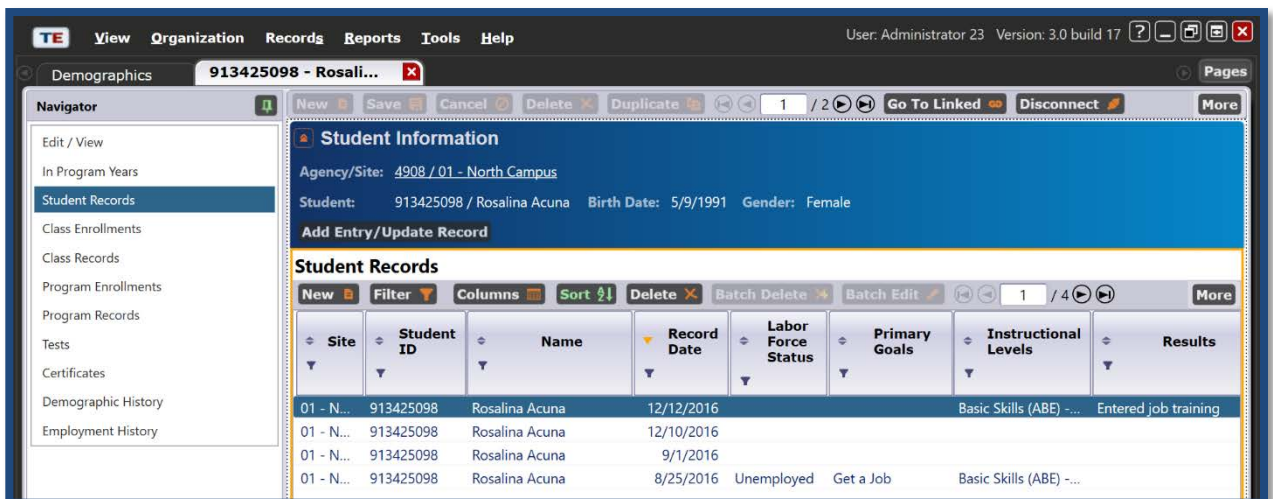
2.3.6 Clicking the different options on the Navigator panel provides views of a variety of information about that student.



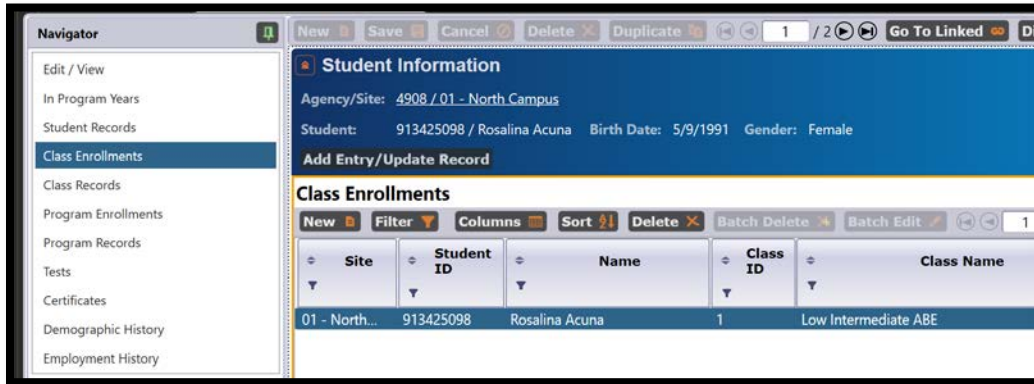
2.3.7 **In Program Years** displays the years in which Rosalina has dated activity in the database.



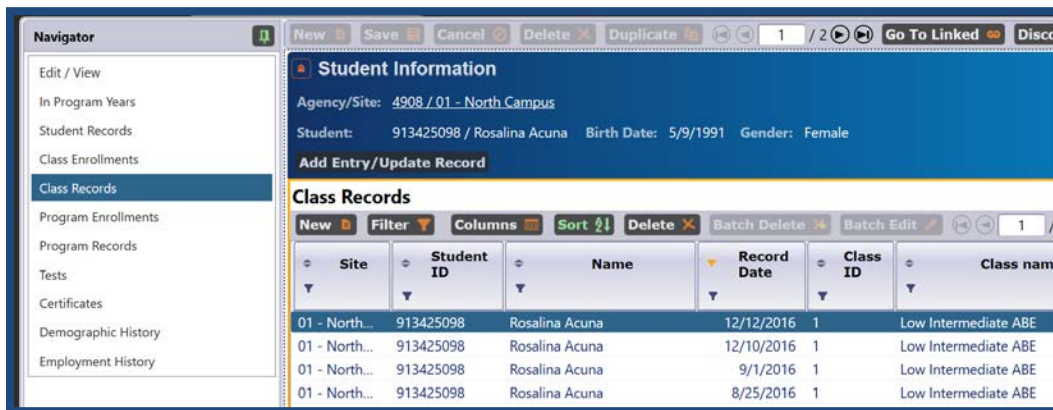
2.3.8 **Student Records** displays a list of all of the dated activity that occurred for Rosalina during the year.



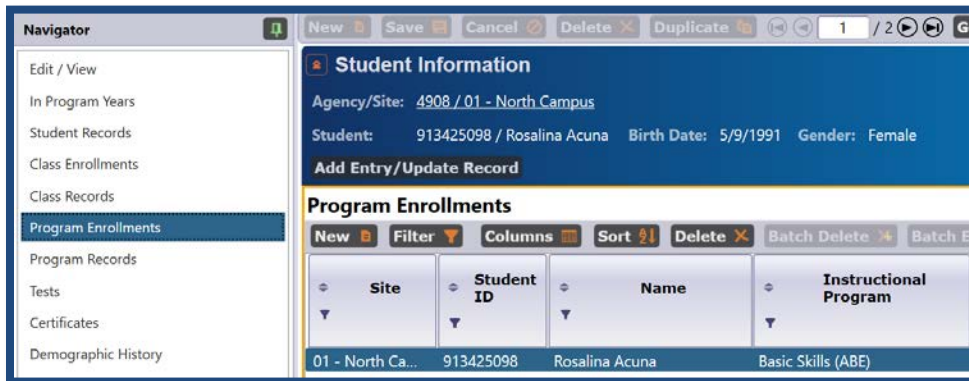
2.3.9 **Class Enrollments** lists each class in which the student is enrolled. This list will only include one listing for each class.



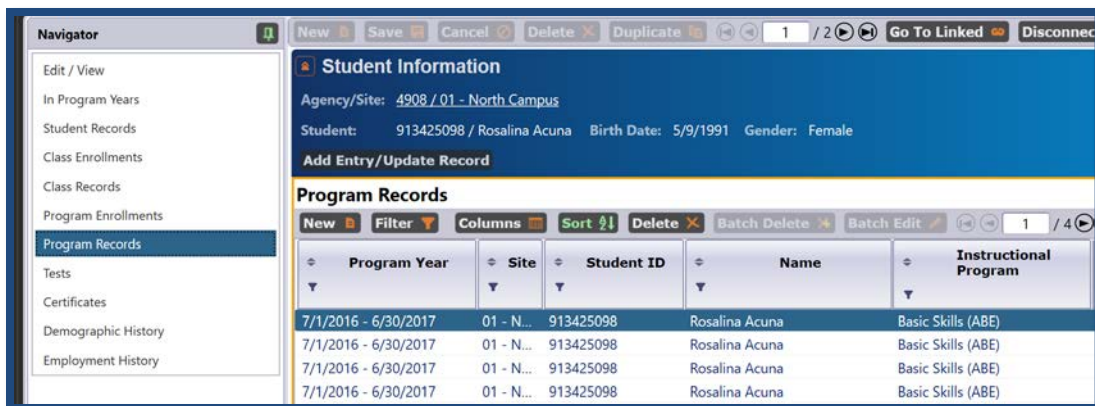
2.3.10 **Class Records** shows all class related activity for the student. This section includes separate records for all data activity related to the class.



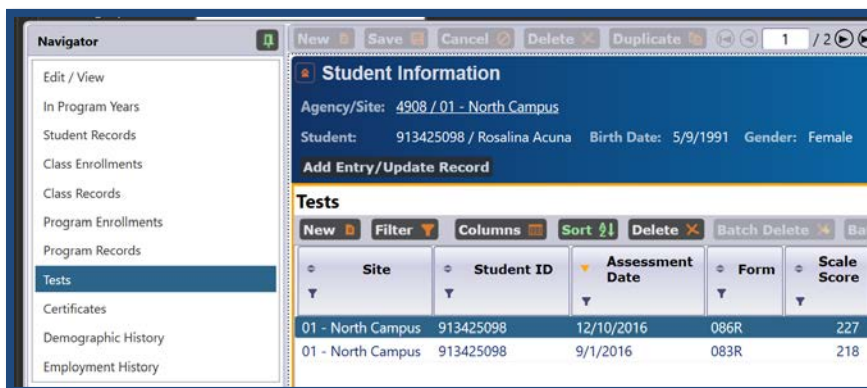
2.3.11 **Program Enrollments** lists each program in which the student is enrolled. This section will only include one listing for each program.



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.



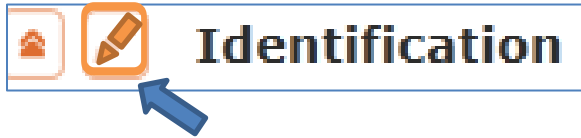
2.3.13 **Tests** displays Rosalina's tests.



2.3.14 Return to **Edit/View**.

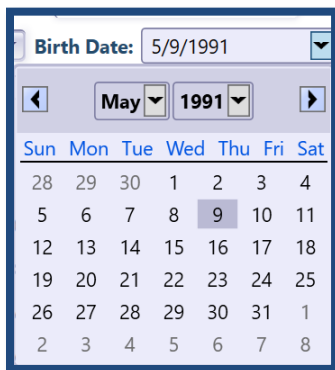


2.3.15 Click the **Edit** icon. This opens the **Edit/View** screen for editing.



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.

### 3. Manual Data Entry

Objectives:

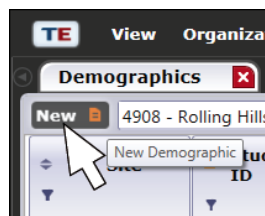
- 3.1 Enter Student Demographics
- 3.2 Create a Class and a Teacher



#### 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.

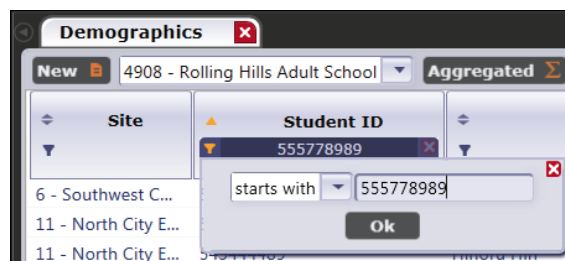



3.1.3 Enter information for the new student as it appears in the graphic on the next page.

3.1.4 When finished, click **Save**.

3.1.5 Return to the Student Demographics lister.

3.1.6 Click the **Add Filter** icon  in the **Student ID** column and type in the Student ID 555778989. Click OK.



Click on the Filter button  and remove filter for “Current Program Year” and press OK. The new student demographics record for Elvin Miles should now appear.

TE View Organization Records Reports Tools Help User: Adminis

Demographics **New Student** X

New Save Cancel Delete Duplicate New / 464 Go To Linked Disconnect Section List

### Student Information

Agency/Site: 4908 - Rolling Hills Adult School  
 Student: 555778989 Birth Date: 1/21/1987 Gender: N/A

**Select Site**  
 Site: 4908 - Rolling Hills Adult School

**Identification**  
 Student ID: 555778989 Is Fake: No  
 Title: First Name: Elvin Middle Name: Last Name: Miles  
 Gender: Unknown Birth Date: 1/21/1987  
 SSN: Consent: Unknown NEDP ID: SSID:  
 GED 2002 ID: E GED 2014 ID: HiSET ID: TASC ID:

**Education**  
 Highest Year of School: Highest Degree or Diploma: CAHSEE Scores:  
 School Outside US:   None  A. A./A.S. Degree Date Score Passed  
 HSE Certificate  4 yr. College Graduate **Add Score**  
 High School Diploma  Higher than B.A./B.S.  
 Technical/Certificate  Individual Education Plan  
 Some college, no degree  Other Diploma/Degree  
 Highest Degree or Diploma Earned Outside US:

**GED 2014 Scores:** **GED 2002 Scores:**  
 Subsection Date Score Passed Non-English Subsection Date Score Passed Non-English  
**Add Score** **Create student record** **Add Score** **Create student record**

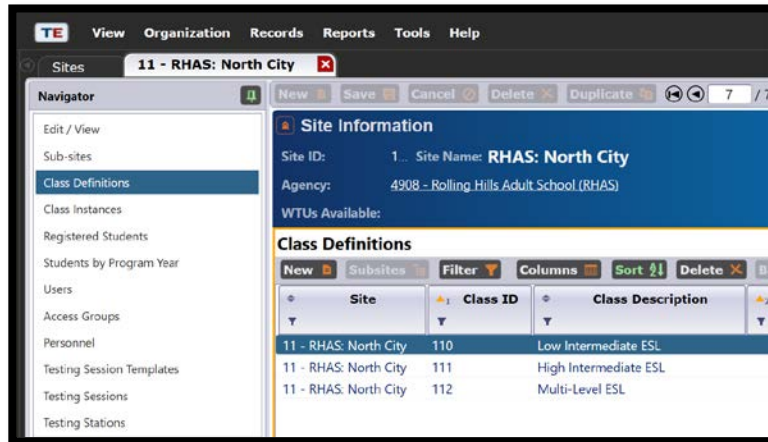
**HiSET Scores:** **TASC Scores:**  
 Subsection Date Score Passed Non-English Subsection Date Score Passed Non-English  
**Add Score** **Create student record** **Add Score** **Create student record**

**Ethnicity, Race & Language**  
 Ethnicity:  N/A  Hispanic or Latino  Not Hispanic or Latino  
 Native Language:  N/A  Arabic  Hmong  Russian  Urdu  Japanese  Nepali   
 English  Chinese  Haitian  Korean  French  Panjabi  Burmese   
 Spanish  Vietnamese  Somali  Tagalog  Portuguese  Bengali  Hindi   
 Races:  White  Filipino  Native Hawaiian  
 Asian  American Indian  Pacific Islander  
 Black or African American  Alaska Native

**Address, Contact & Provider Use**  
 Address: Zip: City:  
 Phone: Fax: Email: emiles@zmail.com

### 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. 

3.2.5 Enter information for a new Class 113 using the data in the graphic below.

**Class Definition Information**

Agency/Site: 4908 / 11 - RHAS: North City

Class ID: 113      Extended ID:

Course Code:

WTUs Available:

**Select Site**

Site:

**Class Definition**

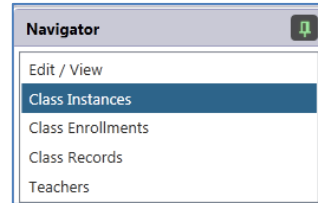
Class ID:       Extended ID:

Course Code:

Class Description:

3.2.6 Click **Save**. Notice that additional selections appear on the **Navigator** bar.

3.2.7 On the Navigator bar, click **Class Instances**.



3.2.8 Click the (lower) **New** icon.

3.2.9 Enter the information using the following information:

**Select Class Definition**

**Class Definition:** Site:   
 Program Year:   
 Class Definition:

**Class Instance**

**Class Start Date:**  **Class End Date:**

**Instructional Programs:**

<input type="radio"/> N/A	<input type="checkbox"/> High School Diploma	<input type="checkbox"/> Adults w/Disabilities
<input type="checkbox"/> Basic Skills (ABE)	<input type="checkbox"/> HSE	<input type="checkbox"/> Adults supporting K12 student
<input checked="" type="checkbox"/> ESL/ELL	<input type="checkbox"/> Career and Technical Education (CTE)	<input type="checkbox"/> Other Program
<input type="checkbox"/> Citizenship	<input type="checkbox"/> Workforce Readiness	<input type="checkbox"/> ROCP

**Special Programs:**

<input type="checkbox"/> None	<input type="checkbox"/> Homeless Program	<input type="checkbox"/> Special Needs	<input type="checkbox"/> Even Start
<input type="checkbox"/> EL Civics (IELCE)	<input type="checkbox"/> Family Literacy	<input type="checkbox"/> Alternative Ed. [K12]	<input type="checkbox"/> CBET
<input type="checkbox"/> Jail	<input type="checkbox"/> Workplace Ed.	<input type="checkbox"/> Non-traditional Training	<input type="checkbox"/> Other
<input type="checkbox"/> Community Corrections	<input type="checkbox"/> Tutoring	<input type="checkbox"/> Older Adults	
<input type="checkbox"/> State Corrections	<input checked="" type="checkbox"/> Distance Learning	<input type="checkbox"/> 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.

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.

Program year	Student code	Name	Site	Class code	Class name
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

**Select Personnel**

Personnel: Container:

Personnel:

**Select container/associations for role**

Container:

Class Definition:

Special Program:

**Role Identification**

Functional Role:  Administrator  Teacher

Start Date:

End Date:

Role is Related to Instructional Program:

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

3.2.20 Click **Save**.

3.2.21 On the **Pages** tab, click **Close All Pages**.