



Basics Exercises 2017



1. Navigation.....	3
1.1. Open TOPSpro Enterprise (TE)	3
1.2. Navigate the menus, submenus, and icon bar	5
1.3. Explore the relationships of records and the database hierarchy	7
2. Verifying & Editing Data	11
2.1. Use the TE Listers to find records	11
2.2. Explore and edit student records.....	17
3. Manual Data Entry	22
3.1. Enter Student Demographics	22
3.2. Create a Class and Assign a Teacher	24
4. Scanning.....	28
4.1. Scan new records in TE	28
4.2. Edit and Verify Scanned records in TE.....	30
5. TE User Accounts	31
5.1. Create a new user in TE	31
6. Generating Reports.....	33
6.1. Locate reports using the TE menu	33
6.2. Generate reports using the report setup window	Error! Bookmark not defined.
6.3. Display, print, and navigate throughout TE reports.....	36
6.4. Use dynamic “drill down” features in TE Reports	38

1. Navigation

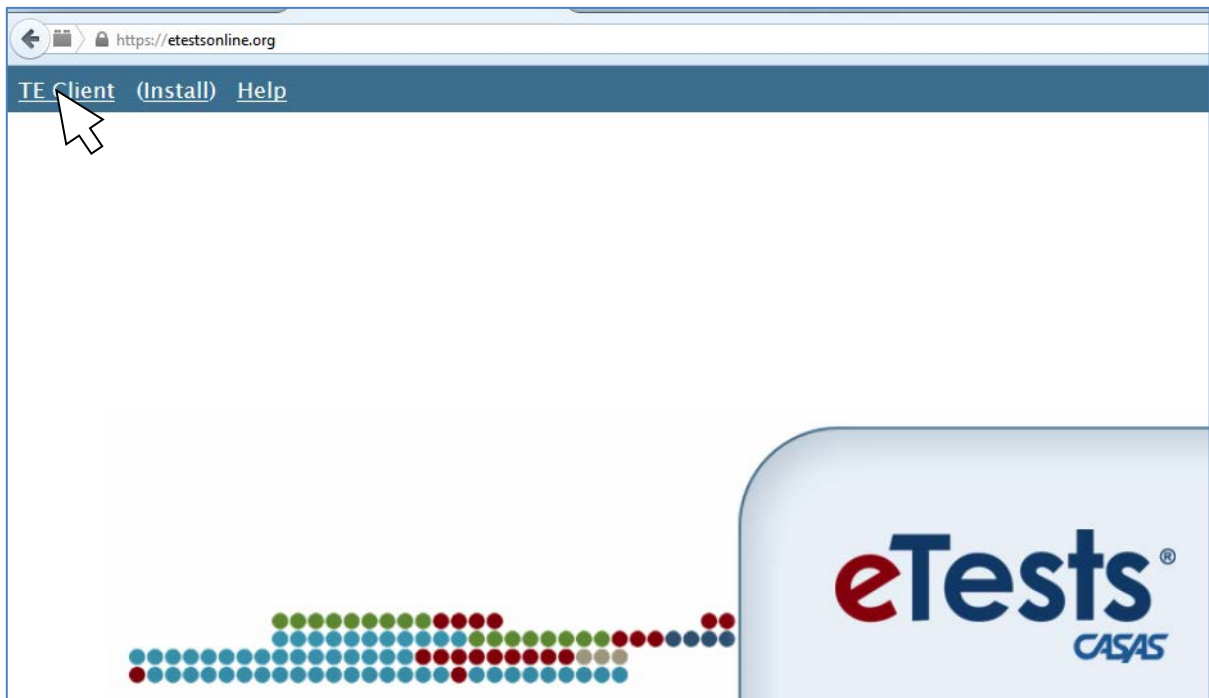
Objectives:

- 1.1 Install TOPSpro Enterprise (TE)
- 1.2 Open TE
- 1.3 Explore the menus and submenus
- 1.4 Explore the relationships of records and database hierarchy



1.1. Install TOPSpro Enterprise (TE)

- 1.1.1. From your Internet browser, type [www.etestsonline.org](https://etestsonline.org). This is the Website where you can install TE online.



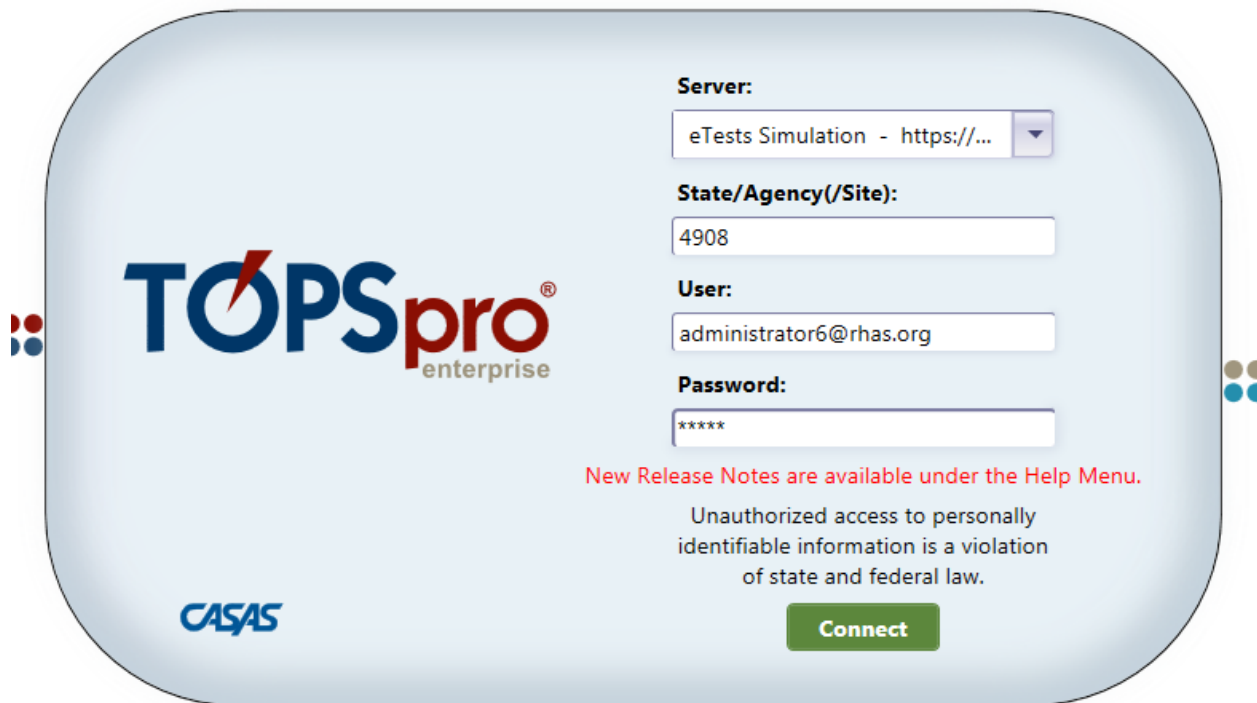
- 1.1.2. Click **TE Client** on the upper left hand corner of your screen.
- 1.1.3. Follow the prompts from your Web browser to save and/or run this file.
- 1.1.4. When the prompt appears, click Install. It will take a few minutes to install TE, depending on the speed of your Internet connection. TE will automatically open once the installation is complete.

1.2 Open TE

1.2.1. Start the program by double-clicking the TE Desktop icon located on the computer desktop. If you just installed TE, this icon appears on your desktop automatically during installation.



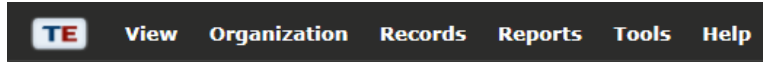
1.2.2. Log in using the credentials below. The facilitator will provide you with a specific User profile. The password is **admin**.

A screenshot of the TOPSpro enterprise login interface. On the left is the TOPSpro enterprise logo. On the right are four input fields: 'Server:' with a dropdown menu showing 'eTests Simulation - https://...', 'State/Agency(/Site):' with the value '4908', 'User:' with the value 'administrator6@rhas.org', and 'Password:' with masked characters '*****'. Below the fields is a red text notice: 'New Release Notes are available under the Help Menu.' and a disclaimer: 'Unauthorized access to personally identifiable information is a violation of state and federal law.' At the bottom center is a green 'Connect' button. The CASAS logo is in the bottom left corner of the interface.

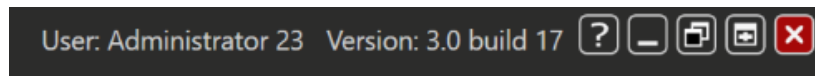
1.2.3. Click **Connect** or press ENTER on the keyboard.

1.3. Navigate the menus, submenus, and icon bar

TE uses a similar type of menu system that you see in most Windows-based applications. Look at the menu bar.



- 1) The left side of the bar shows the menu bar options: **TE, View, Organization, Records, Reports, Tools, and Help.**
- 2) To the right is the title bar. It displays your Username and the version of Enterprise that you are using, and other options to adjust your screen size.

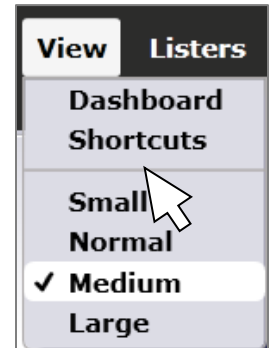


Now let's take a look at some of the menu features. Do not worry about using any of these functions yet – just point to the different features menu so you can see how TE organizes its menu.

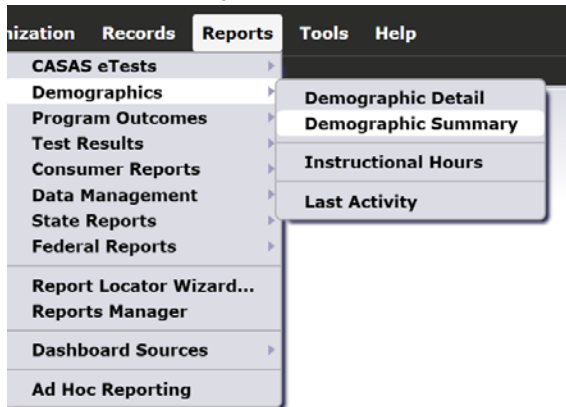
- 1.3.1. Find the **TE Menu icon** and click once. Highlight each menu option.



- 1.3.2. On the **View** menu, point to **Medium**. Note the change in font size on the menus.
- 1.3.3. On the **Organization** menu, point to **Classes**, and select **Definitions**.
- 1.3.4. On the **Records** menu, point to **Programs**, and select **Enrollments**.



1.3.5. On the **Reports** menu, point to **Demographics**, and point to **Demographic Summary**.



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

1.3.7. On the **Help** menu, point to **Contents**.



EXERCISE 1.1

1. Which Website enables you to install **TE**?

2. How would you change the **Display** to a larger font size?

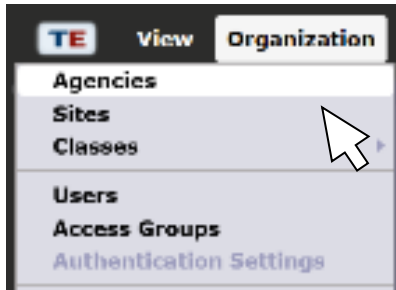
3. How would you open the **Learning Gains Summary** report?

4. Where would you import data from a third party system?

5. What is the difference between the listers featured on the **Organization** menu and those on the **Records** menu?

1.4. Explore the relationships of records and the database hierarchy

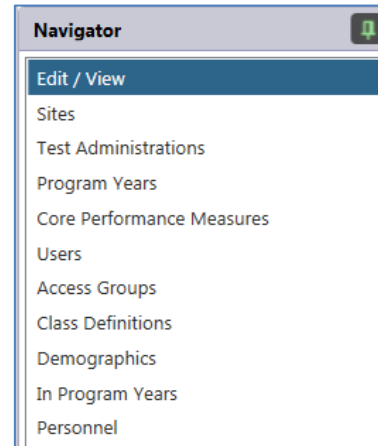
1.4.1. On the **Organization** menu, click **Agencies**.



1.4.2. Near the top of the TE reporting hierarchy is the Agency. Place the cursor on top of the **Agency Name** that is highlighted in blue. Double-click the agency name with the left-mouse button.

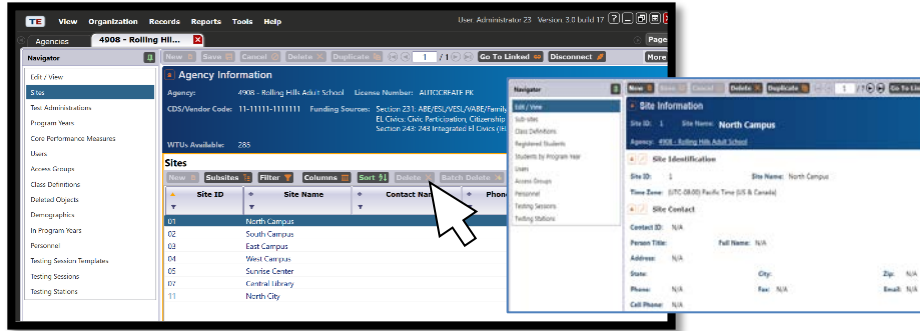
4908	Rolling Hills Adult School	California	Civic Participation, Citizenship Preparati...
------	----------------------------	------------	---

1.4.3. A new tab containing agency information will open. View the Navigator section of this window to the left. **Edit/View** is highlighted indicating that the data for this agency is editable.



1.4.4. Click **Sites**. Each Agency in TE contains one or more Sites. Sites can be a physical location or a cluster of locations within the agency.

1.4.5. Double-click the first site, Site 1, North Campus.



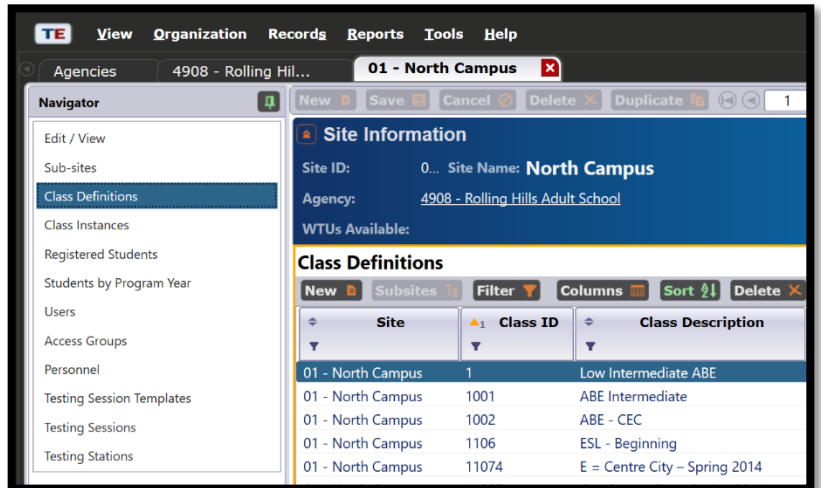
1.4.6. The **Site Information** tab should open.

1.4.7. Once again, the **Navigator** bar opens to **Edit/View**, and displays the basic information about this site.

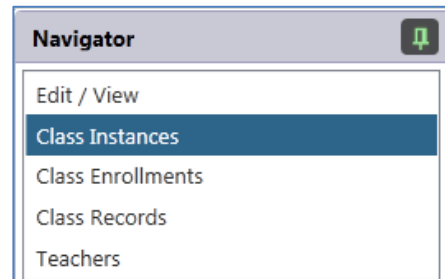
1.4.8. Click **Class Definitions**. Each Site contains one or more Classes.

Place the mouse on top of the first class on the list, Class 1, Low Intermediate ABE. Double-click the record.

The **Class definition** tab opens again with the **Navigator** bar on the left and **Edit/View** at the top.

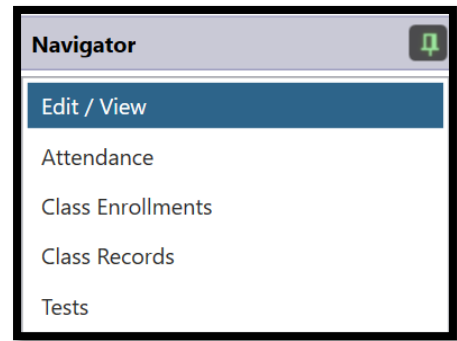


1.4.9. Click **Class Instances**. This displays a record with more detailed information about that class.



1.4.10. Double-click anywhere on the row to open the record listed.

1.4.11. Once again, this record includes a **Navigator** bar that includes different selections related to the record that you opened.

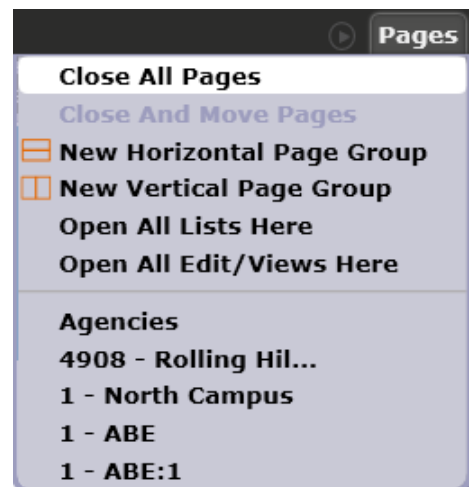


1.4.12. Click **Class Enrollments**. This displays an *unduplicated* list of students assigned to this class.

Site	Student ID	Name	Class ID	Class Name	Class status	Date Entered Class
1 - North C...	561677132	Susie Gallegos	1	ABE	Active	7/1/2012
1 - North C...	872347348	Ruinistia L Fabroso	1	ABE	Active	7/1/2012
1 - North C...	908354098	Sally Mortimer	1	ABE	Active	7/1/2012
1 - North C...	987234982	Bilford Wrimley	1	ABE	Active	7/1/2012
1 - North C...	308303438	Rick L Ankiel	1	ABE	Active	7/3/2012
1 - North C...	983498350	Joseph E Mouton	1	ABE	Active	7/3/2012
1 - North C...	938579834	Leean Jacob	1	ABE	Active	7/11/2012
1 - North C...	983579384	Rupert Bork	1	ABE	Active	7/24/2012
1 - North C...	908374598	Bill Gilmore	1	ABE	Active	7/25/2012

1.4.13. Click **Class Records**. This displays a *duplicated* list of students in the class, with a separate record created each time new information is updated for that student.

1.4.14. On the right hand side of the screen, find the **Pages** tab to open a new menu. On the **Pages** menu, select **Close all Pages** to clear your screen.



Congratulations!

You have successfully navigated throughout TE.

EXERCISE 1.2

1. What is the **Agency** number for Rolling Hills Adult School? _____
2. How many **Sites** are included in Rolling Hills Adult School? _____
3. How many **Classes** are included in Site 2, South Campus? _____
4. How many **Students** are enrolled in the North Campus Class 1, ABE? _____
5. How many total records are there in Class 1 ABE when you click **Class Records**? _____
6. Who is the first **Student** listed in the North Campus Class – 424 – ESL morning?

7. Which **Class** has a higher enrollment – 424 ESL morning, or 432 ESL high?

8. How many **Students** are assigned to Site 2 – South Campus?

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

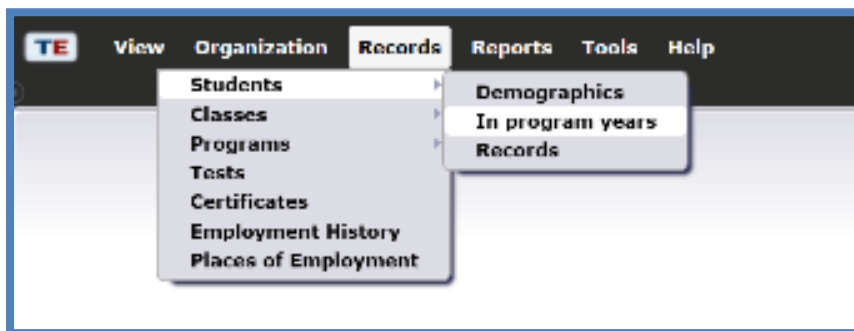
There are several selections included in the **Organization** and **Records** menus. These are the two menus in TE that include listers.

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.

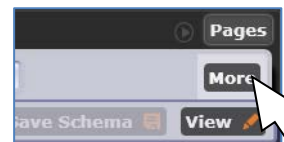
2.1.3. The contents of the lister will then appear. Each row that you see represents an individual record. You can single-click anywhere on the row of the record to highlight it. Double-click anywhere on that row to open, view, or edit a record.

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.



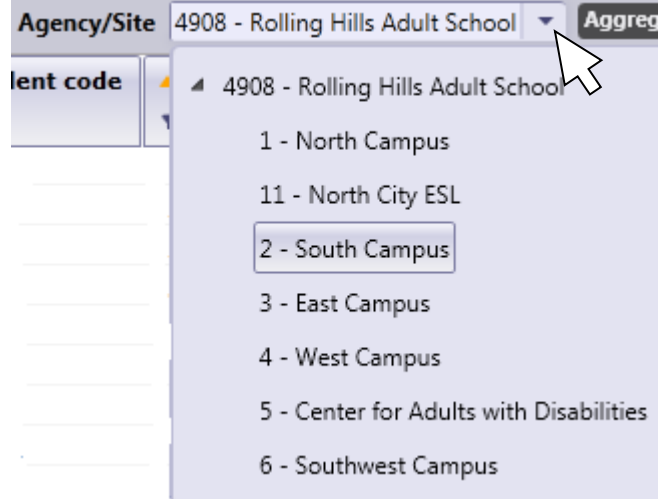
2.1.5. Locate additional buttons by clicking the **More** button to the right of the other action buttons.



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.



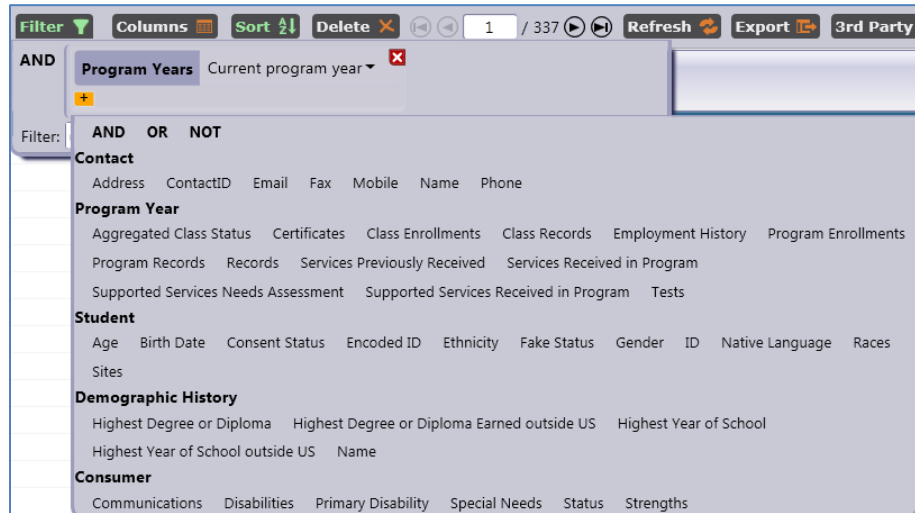
This will limit your list of students to only those attending that **Site**.

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

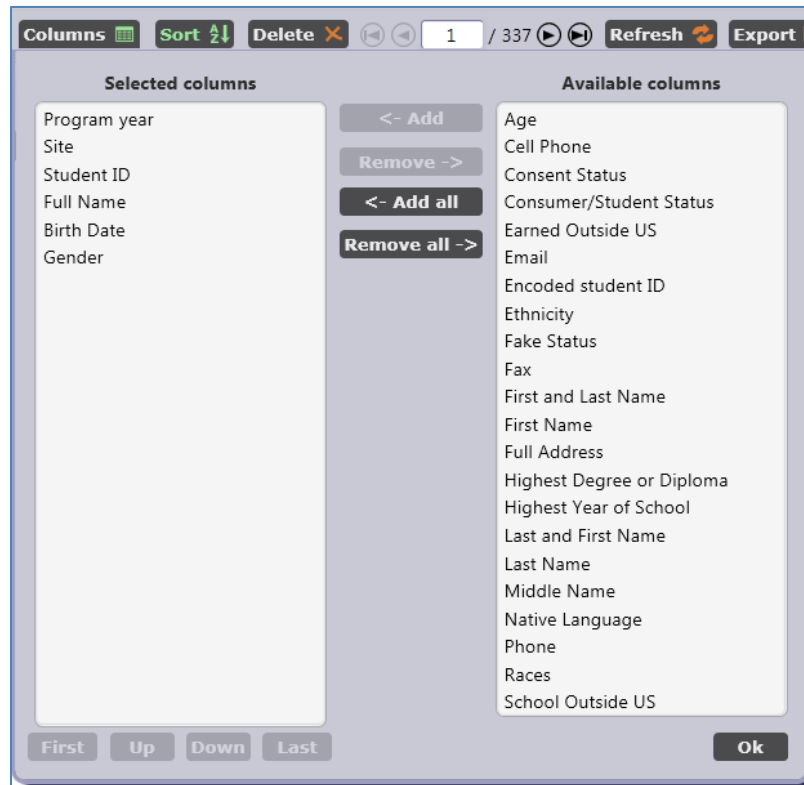
- 2.1.9. Use the **Filter**, **Columns**, and **Sort** buttons to organize the display of your lister.



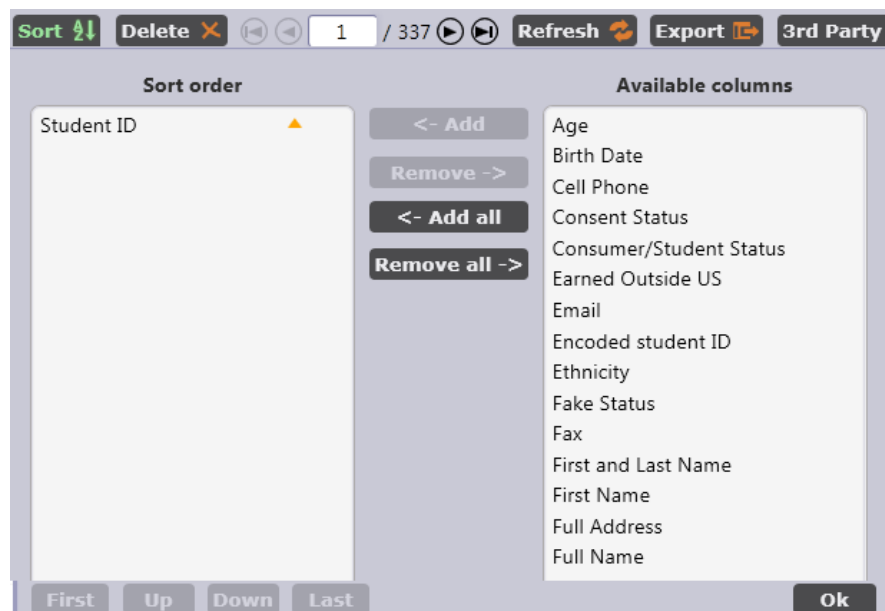
- **Filter** allows you to limit your lister display only records that meet specific criteria that you select.



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



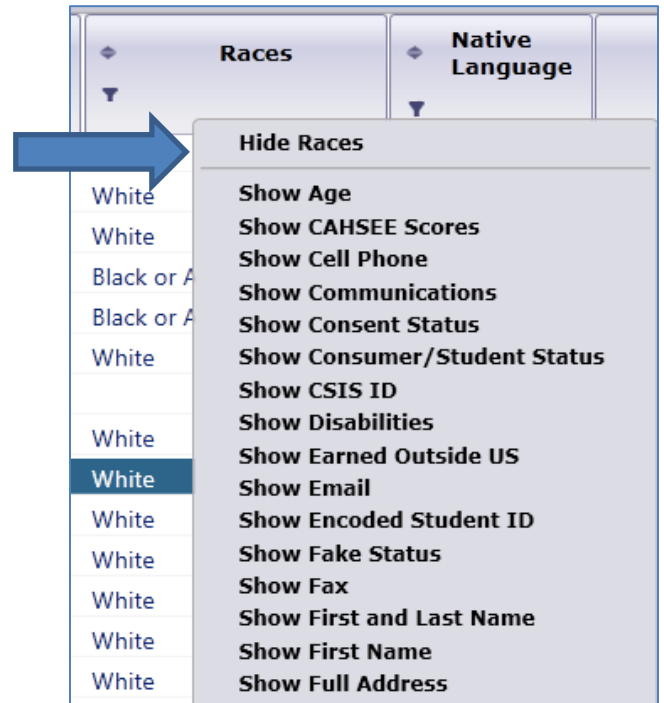
- **Sort** is where you designate which field determines the display order of your lister, for example the screen shot below shows a lister sorted numerically by Student ID.



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

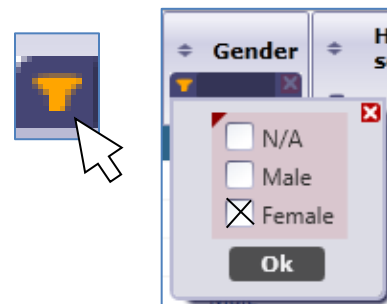
TE also provides users with simple options to quickly retrieve information, and to customize listers to display preferred fields.

- 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**.

Age	Gender	Highest school year	Highest degree or diploma
3...			
<input type="checkbox"/> N/A start: <input type="text" value="33"/> end: <input type="text" value="43"/>			
<input type="button" value="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**? _____

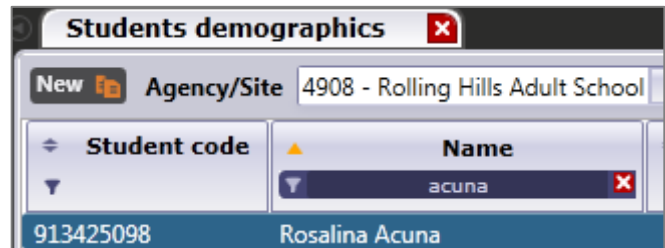
6. How many **Female Students** are there in the program year at Rolling Hills between the ages of 23 and 29? _____
7. How many students enrolled in Site 2, South Campus with native language of Spanish? _____

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.

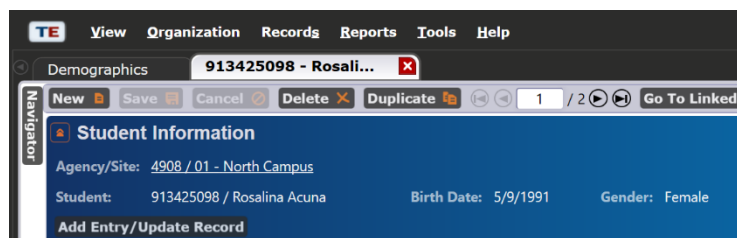
2.3.1 On the **Records** menu, point to **Students**, and then click **Demographics**,

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.)



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

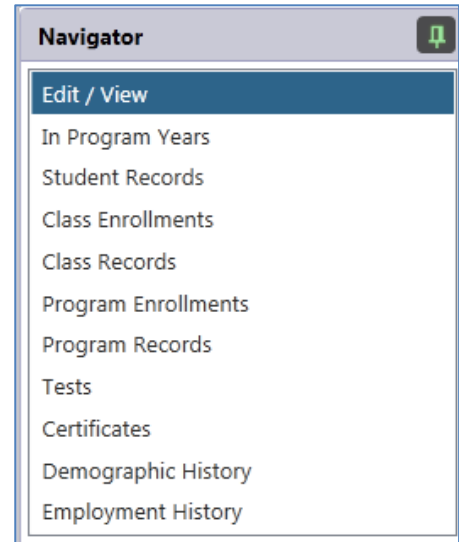
2.3.4 The **Student Information** tab should open.



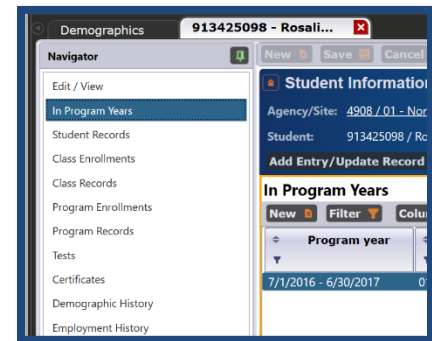
Do a guided tour of Rosalina's records.

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.”

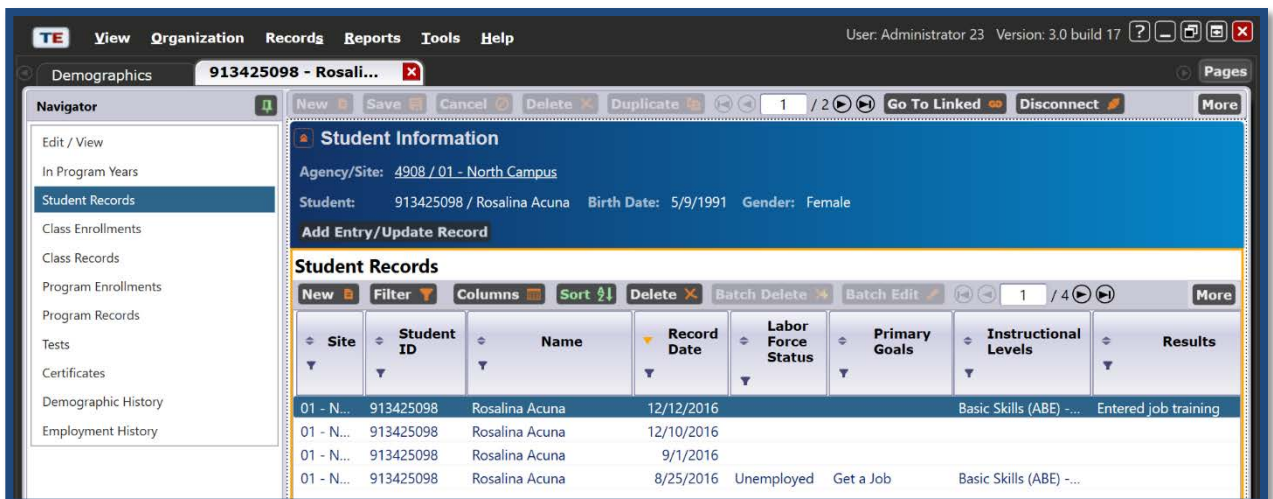
2.3.6 Clicking the different options on the Navigator panel provides views of a variety of information about that student.



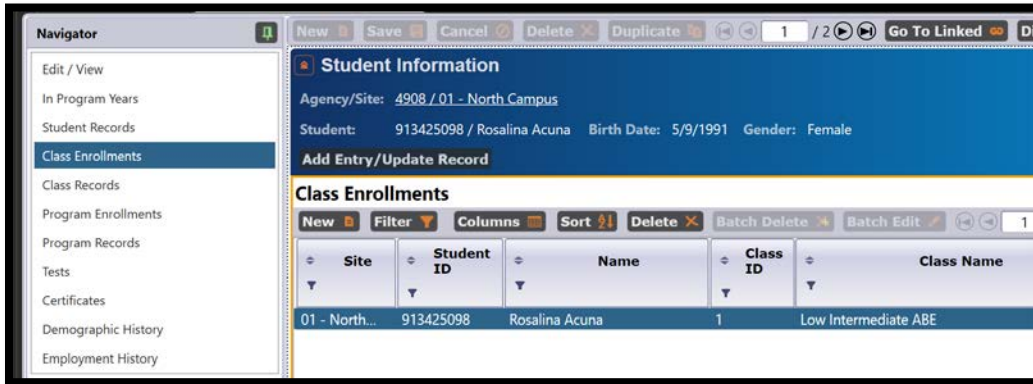
2.3.7 **In Program Years** displays the years in which Rosalina has dated activity in the database.



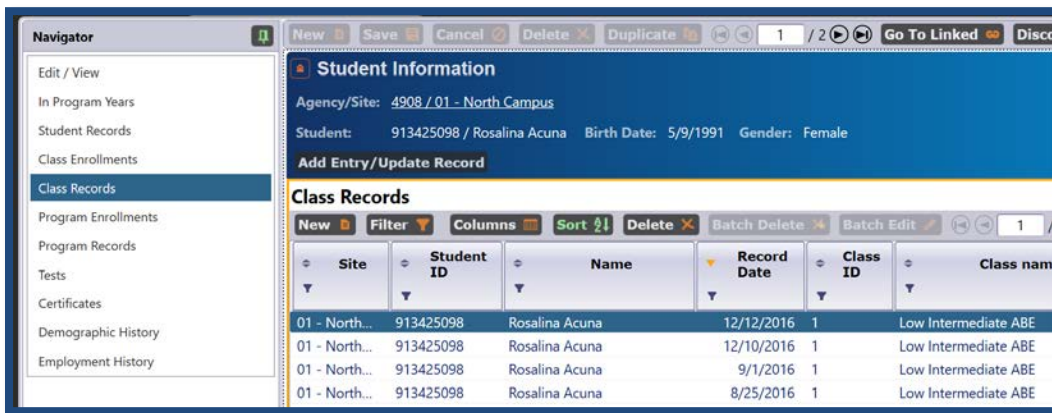
2.3.8 **Student Records** displays a list of all of the dated activity that occurred for Rosalina during the year.



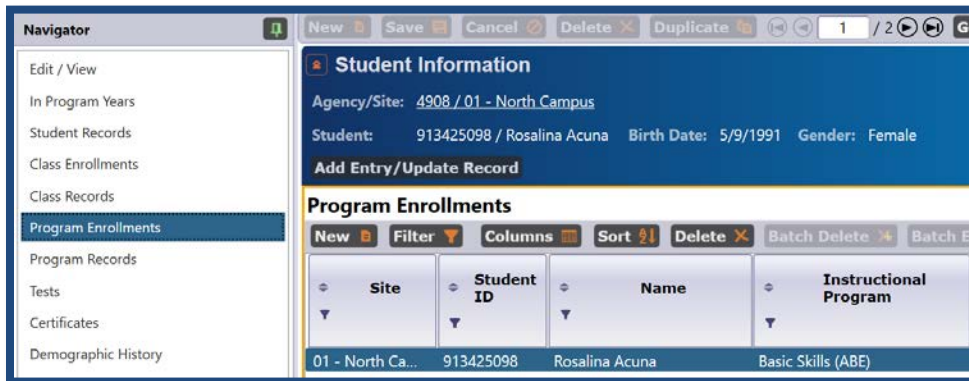
2.3.9 **Class Enrollments** lists each class in which the student is enrolled. This list will only include one listing for each class.



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.



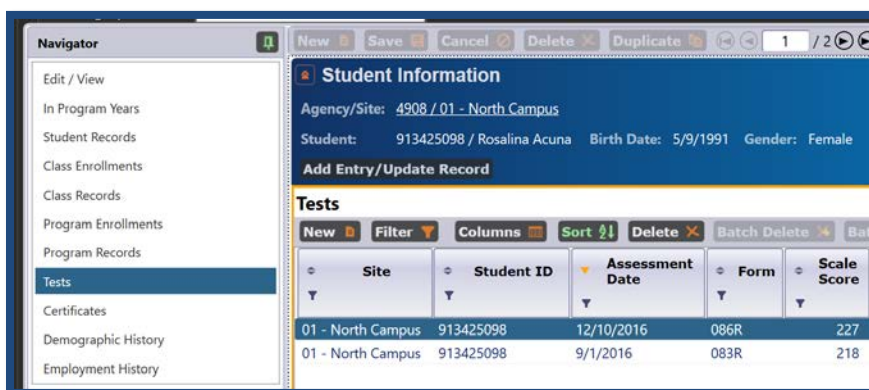
2.3.11 **Program Enrollments** lists each program in which the student is enrolled. This section will only include one listing for each program.



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.

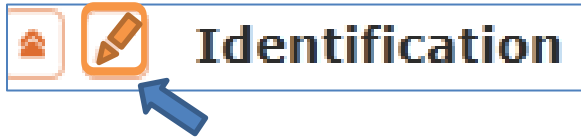


2.3.13 **Tests** displays Rosalina's tests.



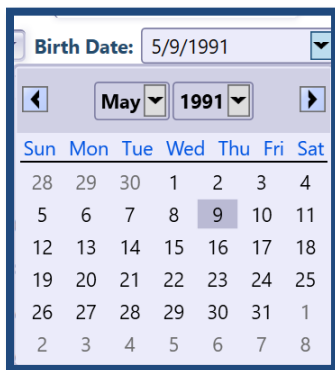
2.3.14 Return to **Edit/View**.

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:

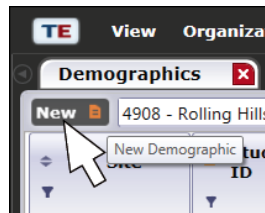
- 3.1 Enter Student Demographics
- 3.2 Create a Class and a Teacher



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.

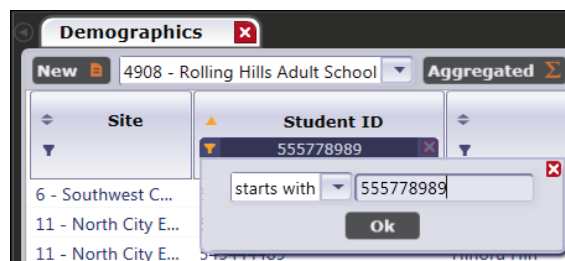



3.1.3 Enter information for the new student as it appears in the graphic on the next page.

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**

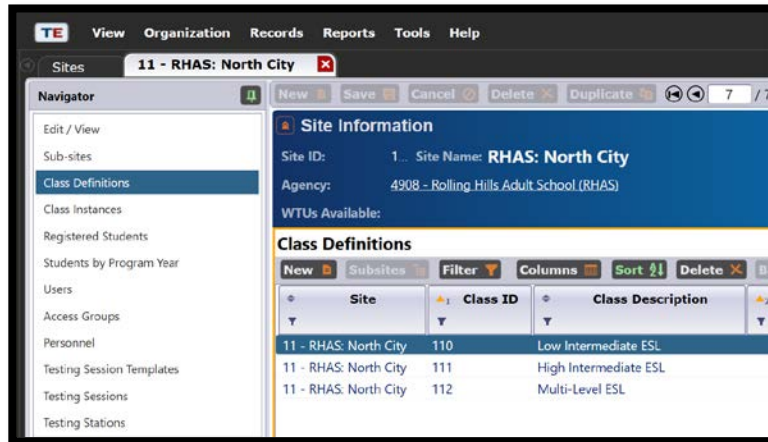
HiSET Scores: **TASC Scores:**
 Subsection Date Score Passed Non-English Subsection Date Score Passed Non-English
Add Score **Create student record** **Add Score** **Create student record**

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

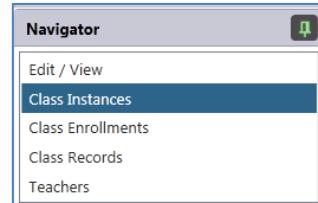
Class ID: Extended ID:

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	

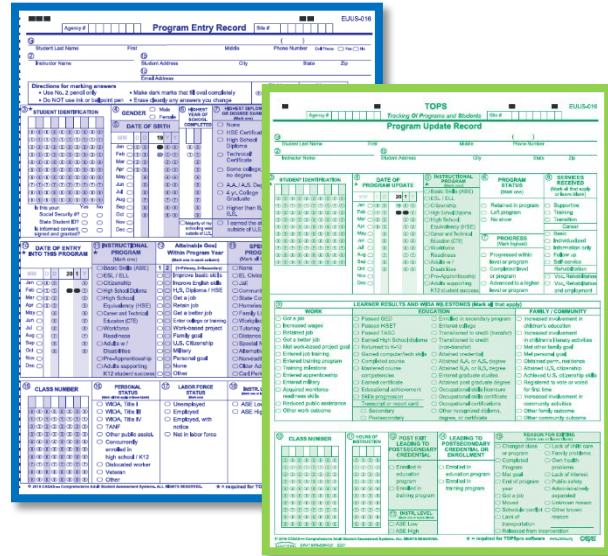
3.2.20 Click **Save**.

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

4. Scanning

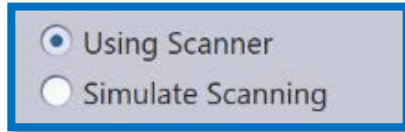
Objectives:

- 4.1 Scan New Records in TE
- 4.2 Edit and Verify Scanned Data in TE

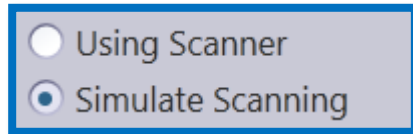


4.1 Scan new records in TE

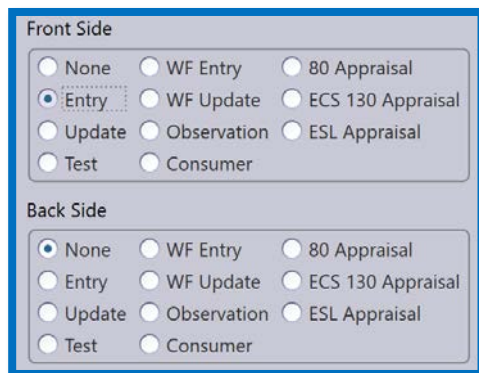
- 4.1.1 On the **Tools** menu, select **Scanning Wizard**.
- 4.1.2 When scanning at your agency, choose **Using Scanner** and then click **Next**.



- 4.1.3 But for this training, choose **Simulate Scanning**. Click **Next**.

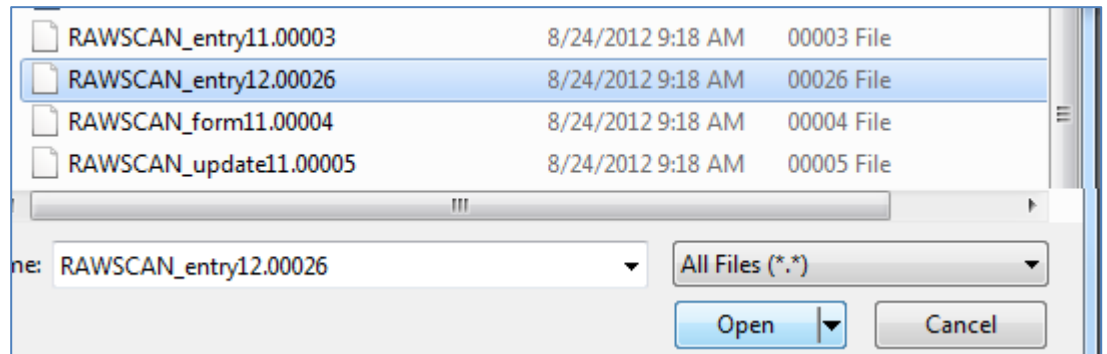


- 4.1.4 Select **Entry** for the Front Side, and for Back Side, select **None**.



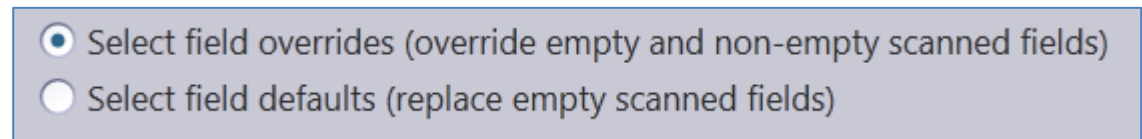
4.1.5 Click **Next**

4.1.6 In the Windows dialog box, find the Entry Record simscan file to simulate scanning. Click **Open**. (Note: your file will differ from the graphic below. The facilitator will provide you more instructions on this step.)

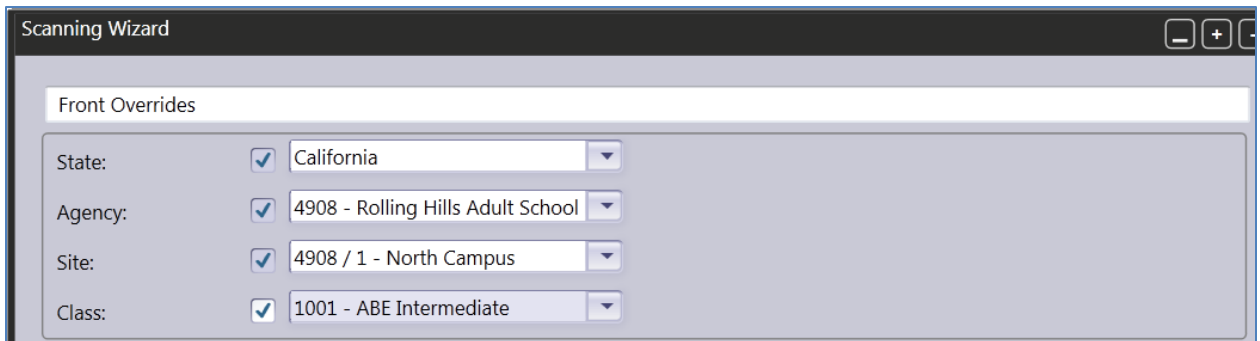


4.1.7 Click **OK**, and then click **Next**.

4.1.8 Check Select field overrides and then click **Next**.



4.1.9 In Front Overrides input the following information below.



4.1.10 Verify the additional settings on the next screen and Click **Next**.

4.2 Edit and Verify Scanned records in TE

The next step displays the list of the records you just scanned. Here is where we can “batch repair” the records we created during our scan session, and also add the name(s) for the students we entered.

4.2.1 Select a record for editing and then double-click that record, or click **Edit Records**. This opens the **Data Correction Edit Window**.

4.2.2 Edit the record like the example in the graphic below. (Note: your example may differ from the data represented in the graphic. Your instructor will provide more directions if necessary.)

Student ID:	<input type="checkbox"/>	3002
First Name:	<input checked="" type="checkbox"/>	Gracie
Middle Name:	<input type="checkbox"/>	
Last Name:	<input checked="" type="checkbox"/>	Nunez
SSN:	<input type="checkbox"/>	
Consent Signed:	<input type="checkbox"/>	No
Gender:	<input type="checkbox"/>	Female
Birth Date:	<input type="checkbox"/>	11/27/1965
Highest School Year:	<input type="checkbox"/>	14
School Was Outside US:	<input type="checkbox"/>	Yes
Highest Diploma:	<input type="checkbox"/>	<input type="radio"/> None <input type="radio"/> Technical/Certificate <input type="radio"/> 4 yr. College Graduate <input type="radio"/> GED Certificate <input checked="" type="radio"/> Some college, no degree <input type="radio"/> Graduate Studies <input type="radio"/> High School Diploma <input type="radio"/> A. A./A.S. Degree <input type="radio"/> Other Diploma/Degree
Diploma Earned Outside US:	<input type="checkbox"/>	Yes
Ethnicity:	<input type="checkbox"/>	<input checked="" type="radio"/> Hispanic or Latino <input type="radio"/> Not Hispanic or Latino
Race:	<input checked="" type="checkbox"/>	<input type="checkbox"/> White <input type="checkbox"/> Black or African American <input type="checkbox"/> Filipino <input type="checkbox"/> Alaska Native <input type="checkbox"/> Asian <input checked="" type="checkbox"/> Native Hawaiian / Pacific Islander <input type="checkbox"/> American Indian
Native Language:	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> English <input type="radio"/> Chinese <input type="radio"/> Tagalog <input type="radio"/> Russian <input type="radio"/> Spanish <input type="radio"/> Hmong <input type="radio"/> Korean <input type="radio"/> Farsi <input type="radio"/> Vietnamese <input type="radio"/> Cambodian <input type="radio"/> Lao <input type="radio"/> Other

4.2.3 Click **Save**.

4.2.4 On the Scan Wizard, click **Next**.

4.2.5 Click **Next** to import the record(s) into TE.

4.2.6 Click **Finish**.

5. TE User Accounts

Objectives:

5.1 Create a New User in TE



5.1 Create a new user in TOPS Enterprise

- 5.1.1 On the **Organization** menu, select **Users**.
- 5.1.2 Click **New**.
- 5.1.3 Create the new user account according to the graphic below. For the password type in *coordinator*, all lowercase.

🏠 ✎ **Select Container**

Link with existing personnel:

Container:

🏠 ✎ **User Identification**

User Account:

Password:

Retype Password:

Is Disabled

5.1.4 Select *Coordinator (TE) Access* from the **Groups** drop down menu.

The screenshot shows a 'Groups' section with a dropdown menu. The text 'No groups selected.' is displayed above the dropdown. The dropdown menu is open, showing a search bar with the text 'Type here to search...' and an 'Add' button. Below the search bar, two options are listed: 'Basic (TE) Access' and 'Coordinator (TE) Access', both associated with '4908 - Rolling Hills Adult School'. The 'Coordinator (TE) Access' option is highlighted.

5.1.5 Fill in the **User Contact** info.

The screenshot shows the 'User Contact' form. The form has a title 'User Contact' with a pencil icon. The fields are: 'Contact ID:' (empty), 'Title:' (empty), 'First Name:' (Coordinator), 'Middle Name:' (empty), 'Last Name:' (50), 'Address:' (empty), 'City:' (empty), 'Zip:' (empty), 'Phone:' (empty), 'Fax:' (empty), 'Email:' (coordinator50@rhas.org), 'State:' (Unknown), and 'Cell Phone:' (empty).

5.1.6 Click **Save**.

6. Generating Reports

Objectives:

- 6.1. Locate reports using the TE menu
- 6.2. Generate reports using the New Report Setup window
- 6.3. Display, print, and navigate throughout TE reports
- 6.4. Use dynamic “drill down” features in TE reports
- 6.5. Filter TE reports using Report Viewer Navigator



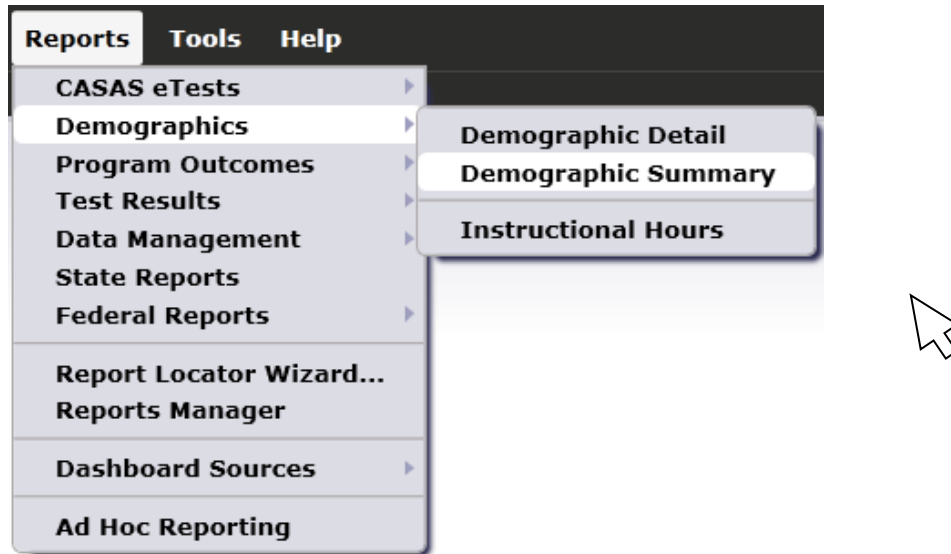
6.1 Locate reports using the TE menu

- 6.1.1. Click the **Reports** drop-down menu.

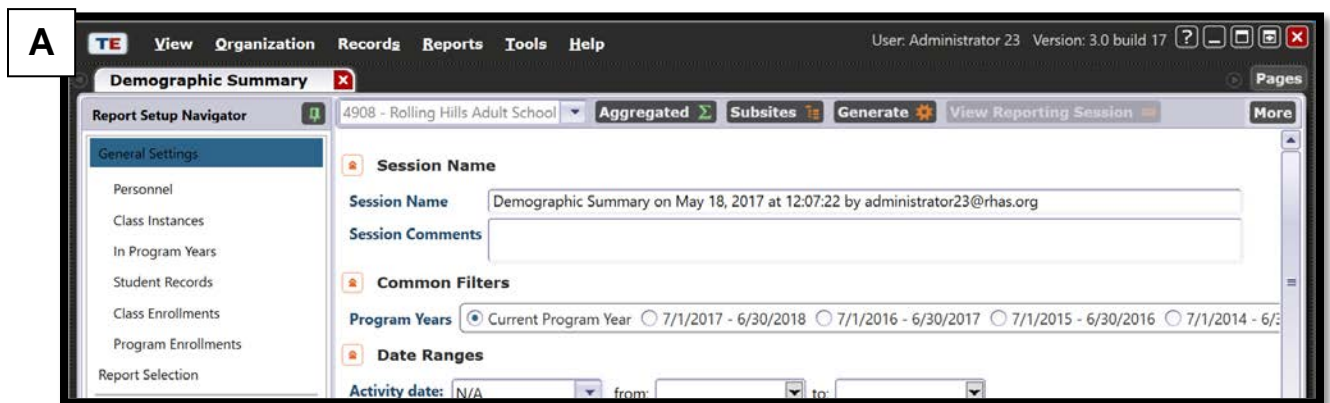


As you can see, there are several submenus or categories of reports in TE. Each submenu includes reports that all relate to similar topics. By scrolling to each category, you can find out which reports that specific section contains. More reports will be added to TE in future development.

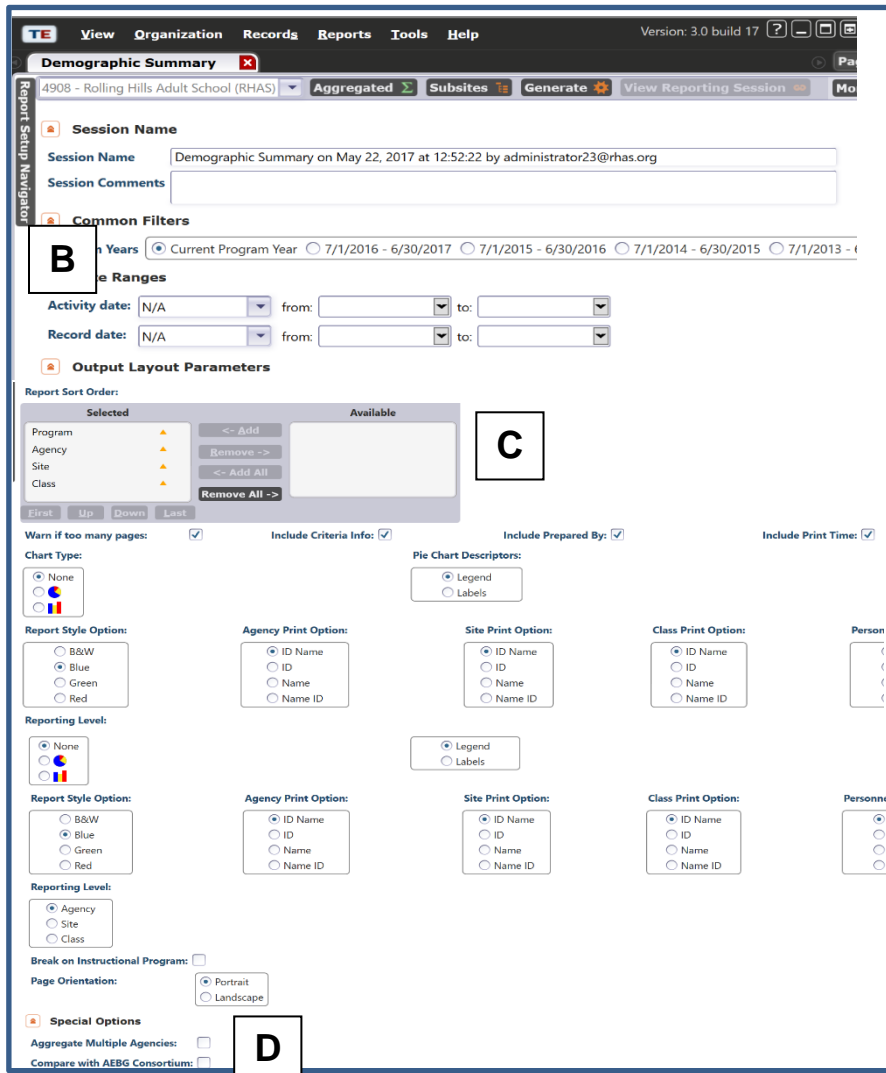
6.1.2. On the **Reports** menu, point to **Demographic Reports**, and then click **Demographic Summary**.



6.1.3. The **Report Setup** window will open. This opens whenever you select any report in Enterprise. In this window you determine what specific information will appear in the report.



A. **Report Setup Navigator** enables the user to filter the report using a variety of criteria, such as by specific student or class. Selections on the Navigator panel vary depending on the content of the report.



B. Program Years and Date Ranges is where you indicate the record dates for the report. For example, in the setup window above, the report will include data from the current program year. **Program Years** enables you to select a specific fiscal year range, while **Date Ranges** enables a more detailed range of dates.

C. Output Layout Parameters includes other selections that give you flexibility to customize the output of your report. This section has features such as **Report Sort Order**, **Page Sort Order**, and **Print Options** enabling the display either numerically by Student

ID or alphabetically by Name. Some of these options vary according to the specific report you generate.

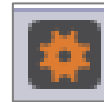
D. Special Options varies from report to report, and is where you can assign specific conditions to that report generation, such as breaking on class or program, or showing the students' complete test history.

For this exercise, we will start by simply generating the report with no modifications to the setup.

We do this by clicking the **Generate** button



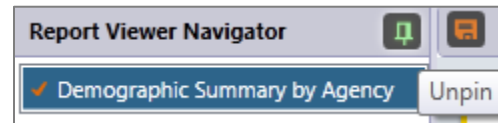
or icon.



6.1.4. Click the **Generate** button.

Demographic Summary report. You can scroll up ↑ and down ↓, and across → to view the report. We will explore this and other reports further in the next Lesson.

6.1.5. To enhance your view of the report, click the **Unpin** icon to minimize the **Report Viewer Navigator**.



6.2 Display, print, and navigate throughout Enterprise reports

6.2.1. Refer to the report you generated. If you need to re-open it, from the **Reports** menu, point to **Demographic**, and then click **Demographic Summary**.

6.2.2. Click the **Generate** button. The report will open.

CASAS			Demographic Summary		Page 1 of 3	
05/23/2017 10:02:56			by Agency		DS2	
Agency: 4908 - Rolling Hills Adult School (RHAS)			Students: 239			
Has SSN			Gender			
Yes	#	%	Male	#	%	
No	56	23.43	Female	125	52.30	
	183	76.57	N/A	112	46.86	
				2	0.84	
Consent			Highest School Year			
Yes	#	%	Under 6	#	%	
No	77	32.22	6 - 8	27	11.30	
N/A	96	40.17	9 - 10	43	17.99	
	66	27.62	11	54	22.59	
			12	33	13.81	
Age			13+	40	16.74	
Under 15	#	%	N/A	8	3.35	
15 - 17	0	0.00		34	14.23	
18 - 21	0	0.00	School out of US			
22 - 24	4	1.67	Yes	#	%	
25 - 29	11	4.60	No	1	0.42	
30 - 34	50	20.92	N/A	134	56.07	
35 - 39	62	25.94		104	43.51	
40 - 44	29	12.13	Ethnicity			
45 - 49	25	10.46	#	%		
50 - 54	21	8.79				
	15	6.28				

6.2.3. There are a variety of icons that run across the top of the report that enable you to perform certain functions. To the left are buttons that appear like this:



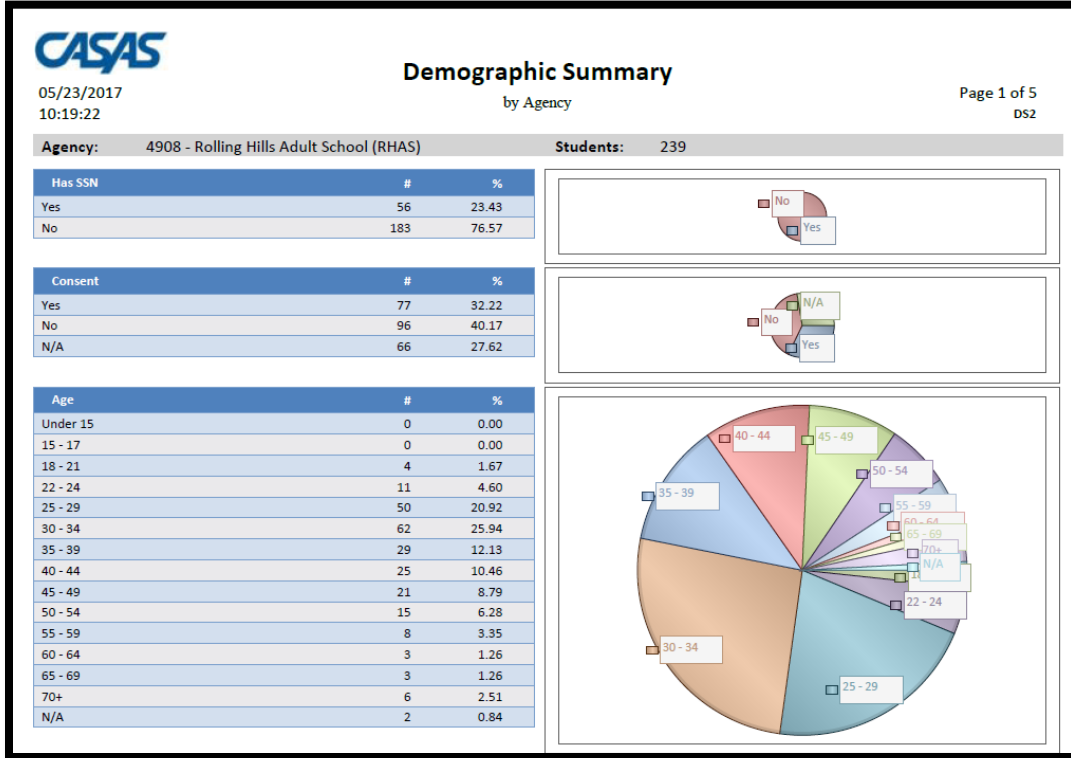
- A. **Keep Session** allows you to save the report so you can open the report in the **TE Reports Manager** at another time with the exact setup modifications you selected in the setup window.
- B. **Export** enables you to save the report in different file formats so you can view the data in other programs. Most TE reports allow export to Word, Excel, Adobe PDF, and Rich Text Format.
- C. To print a hard copy of the report, click the **Print** icon.
- D. The navigation buttons allow you to go to a particular page within the report.
- E. **Layout Settings** enables you to make changes to fields in the setup window without having to close the report.
- F. **Fit Page**, and **Fit Width** adjust the view of the report in different ways.

Now we will regenerate this report. Click **Layout Settings**.



6.2.4 In **Chart Type**, select the pie chart icon; in **Pie Chart Descriptors**, select Labels, and then click **Apply** (at the bottom of the screen.)





6.2.5 The report now displays in both table and pie chart format, with labels to denote each demographics category.

6.2.6 Close the **Demographic Summary** report and the report setup window.

6.3 Use dynamic “drill down” features in TE Reports

6.3.1 On the **Reports** menu, point to **Data Management** submenu, and select **Data Integrity**.

6.3.2 Leave the settings as is in the setup window, and click **Generate**.

6.3.3 Click the **Unpin** icon to provide a full view of the report.

6.3.4 View all of the figures displayed on this report. Hover with your cursor over one of the figures to highlight the number, as shown in the graphic (below).

Summary Information	
Total WIA Title II Learners	237
Learners Concurrently Enrolled in High School/K12	6
Total Learners eligible for WIA Title II	231

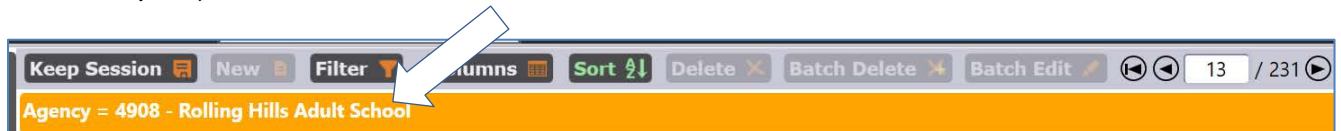
6.3.5 Click the figure on the report that you highlighted. A new Lister appears, that displays a list of the learners included in that number. In this example, clicking the number “231” on the report generates a list of the 231 learners eligible for WIOA.

Program year	Site	Student ID	Name	Birth Date	Gender	Race
7/1/2016 - 6/30/2017	4908 - Rolling...	023945893	Trayla B Ford	3/16/1987	Female	White
7/1/2016 - 6/30/2017	4908 - Rolling...	034903948	Carmen Rodriguez	7/30/1957	Female	
7/1/2016 - 6/30/2017	4908 - Rolling...	039493489	John W Bestway	7/15/1987	Male	White
7/1/2016 - 6/30/2017	02 - South Ca...	045621382	Timothy McFlurry	4/5/1973	Male	White
7/1/2016 - 6/30/2017	4908 - Rolling...	090983439	Krissy Bartholomew	9/9/1984	Female	White
7/1/2016 - 6/30/2017	4908 - Rolling...	091919119	Karen V Corkey	7/13/1987	Female	White
7/1/2016 - 6/30/2017	4908 - Rolling...	092340934	Humil Zritpab	5/25/1994	Female	White
7/1/2016 - 6/30/2017	4908 - Rolling...	092409833	Jaime Gomez	8/20/1994	Male	White
7/1/2016 - 6/30/2017	4908 - Rolling...	093182584	Ronald Screbicizi	8/9/1988	Male	White
7/1/2016 - 6/30/2017	4908 - Rolling...	093548385	Phat Lam	1/31/1993	Female	Asian
7/1/2016 - 6/30/2017	4908 - Rolling...	093734754	Jay Bluegill	9/29/1988	Male	White
7/1/2016 - 6/30/2017	4908 - Rolling...	095898383	Matt R O'Happenstance	9/9/1988	Female	White

6.3.6 Double-click the top record on the list (in this example, Trayla B. Ford) to open that student record.

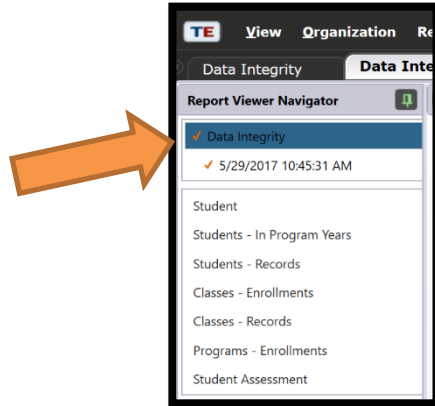
6.3.7 This directs you to that learner’s record so you can immediately view and/or correct the issue displayed on the Data Integrity Report.

6.3.8 Note the orange bar that now appears. This signals that you have drilled down to a specific subset of data included in the report. (Note: clicking the red “X” to the right of the orange bar removes the drill down filter you selected, but will not return to the full report. Double-clicking on the white text in the orange bar will return you to the full report.)



6.4 Filter TE reports using Report Viewer Navigator

6.4.1 Click the report title at the top of the **Navigator** panel to return to the full report.



6.4.2 The other selections in **Report Viewer Navigator** will direct to different TE listers that provide a variety of views that relate to the data cell on which you drilled down.

Generally, **Students – In Program Years** is the option to select if you want to ensure that the item count in the lister matches the items count displayed in the report cell.

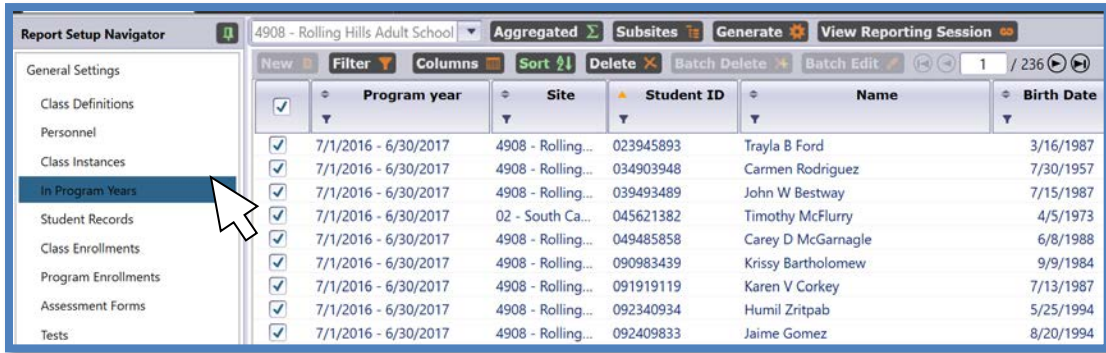
The other selections below **Students – In Program Years** provide more detailed views to facilitate editing and correction of data.

6.4.3 Click **Students – Records**. Note the item count for this lister is much larger than **Students – In Program Years**, as it includes a duplicated list of students.

6.4.4 Open the top listed record (for this exercise, it should be Sofia Fraticelli.) This takes you directly to the student’s data, where you can add or correct the fields listed “on the spot.”

6.4.5 Close the student record, and close the Data Integrity Report, but leave the setup window open.

6.4.6 In Report Setup Navigator, click In Program Years.




This generates a list of all students in the selected program year who qualify for this report. Note that the item count is the same as for the total number of WIOA learners we reviewed in the previous exercise.

6.4.7 In the **Lister**, use the column filters to replicate the same filter we performed in Lesson 2 – in **Age**, filter for students only between the ages of 33 and 43, and in **Gender**, select **Female**.

Age	Gender
33 - 43	Fem...
41	Female
42	Female
42	Female
41	Female
41	Female
34	Female

6.4.8 On the top row, click **Generate**. The report now displays data integrity results for the filter we directed – for only female students between the ages of 33 and 43.



Data Integrity

by Agency

05/15/2017
10:43:15

Agency: 4908 - Rolling Hills Adult School

Summary Information	
Total WIA Title II Learners	25

6.4.9 Close all tabs (Pages, close all pages.)

Congratulations!
You have created and interpreted reports and evaluated
TE report selection criteria.

EXERCISE 6.1

1. List at least three students who appear on the **Data Integrity** report under Item #2 – Less than 12 hours of instruction:

2. What percentage of Rolling Hills WIOA II learners have a conservative estimate pretest score?

3. How many students at Rolling Hills have a **Native Language** of Spanish?

4. According to the database, are there more students at Rolling Hills who are **Employed** or **Unemployed**? _____
5. What are at least two reports available that can display this information?

Any of the following: