Imports

The Imports screen includes the Imports tab, which allows users to upload a file from the computer or from the local server, select the correct format, and from different tools. The Student Match Files tab allows users to review student matches started and complete the process. The Student Match import tool is used to find student_ids for the students in an uploaded file. The Reports tab, which allows users to review a report of imports processed including date, time, import tool, file, etc. The Settings tab allows users to review and enable Import Tool Settings, review and set Conversion Fields, create and edit file mapping "Templates," and view and create File Parsers.

The Imports screen replaces the following screens: Match Students - Admin Panel, Match Students - School Panel, AP Test Parser, Import Tools, and Importer. Note: There is a transition plan in place for these screen replacements. At this time, these screens have not been removed from Focus. Districts should contact their support team (Project Coordinator or Account Executive) for details on how to transition from the original screens to the new Imports screen.

Imports Profile Permissions

1. In the **Users** menu, click **Profiles**.

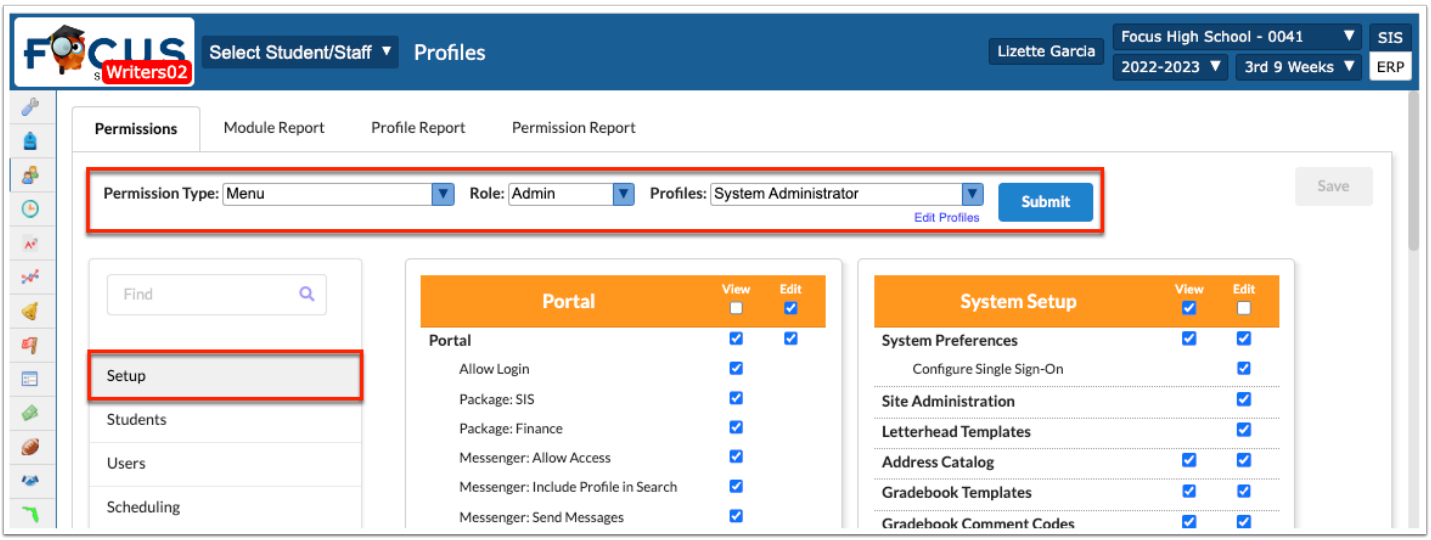
2. Select **Menu** from the **Permission Type** pull-down.

3. Select **Admin** from the **Role** pull-down.

4. Select the applicable **Profiles** from the corresponding pull-down.

5. Click **Submit**.

6. Click the **Setup** tab.



7. In the **Imports** section, select the applicable check boxes for **Imports** permissions. The profile permissions available include:

Imports: Select the **View** check box to allow users to view information and create new import processes.

Import Tools: Select the **View** check box to allow users to conduct imports using the Import Tools tab.

Student Match Files: Select the **View** check box to allow users to utilize the Student Match Files tab and conduct student matching processes.

Reports: Select the **View** check box to allow users to view and run import Reports from the corresponding tab.

Settings: Select the **View** check box to allow users to view and enable specific Settings in order to determine how imports are organized and processed from the corresponding tab.

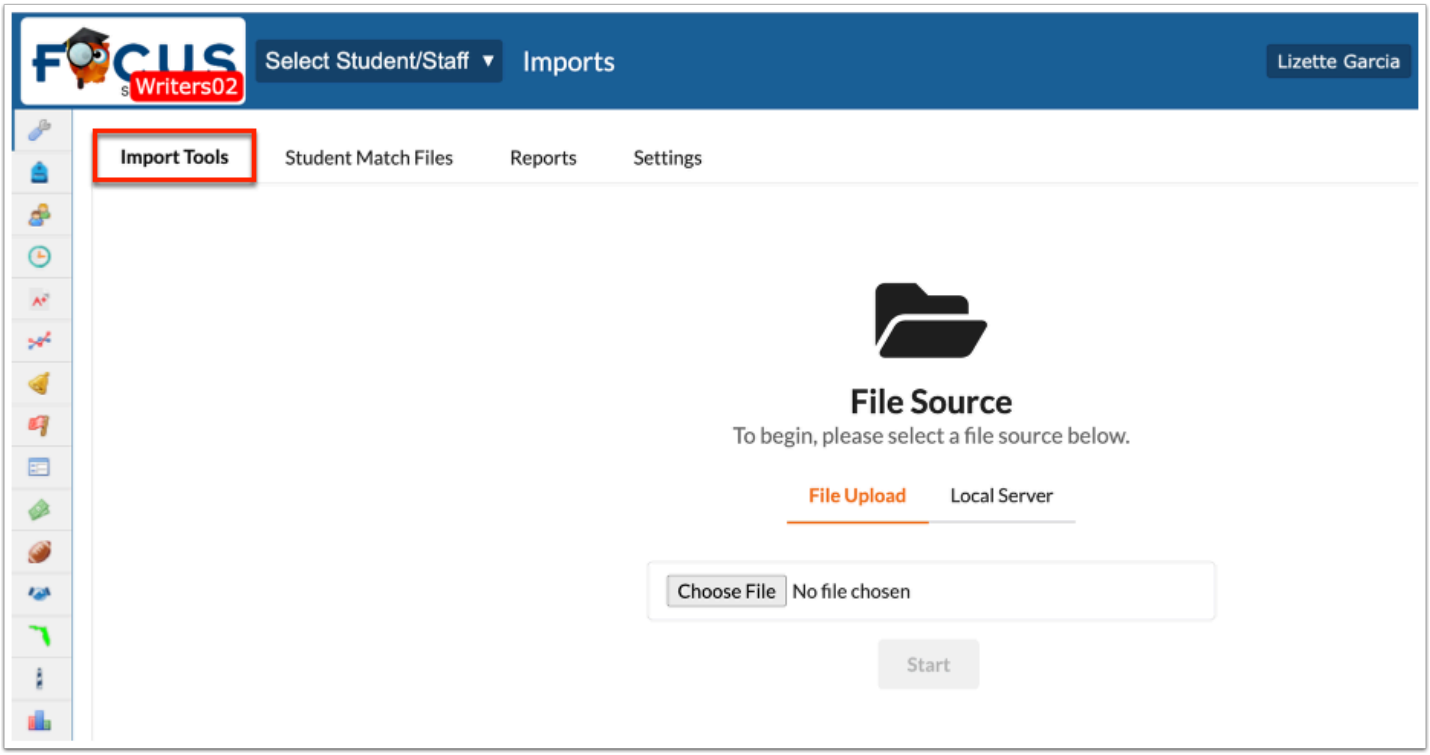
8. Click **Save**.

Imports Navigation

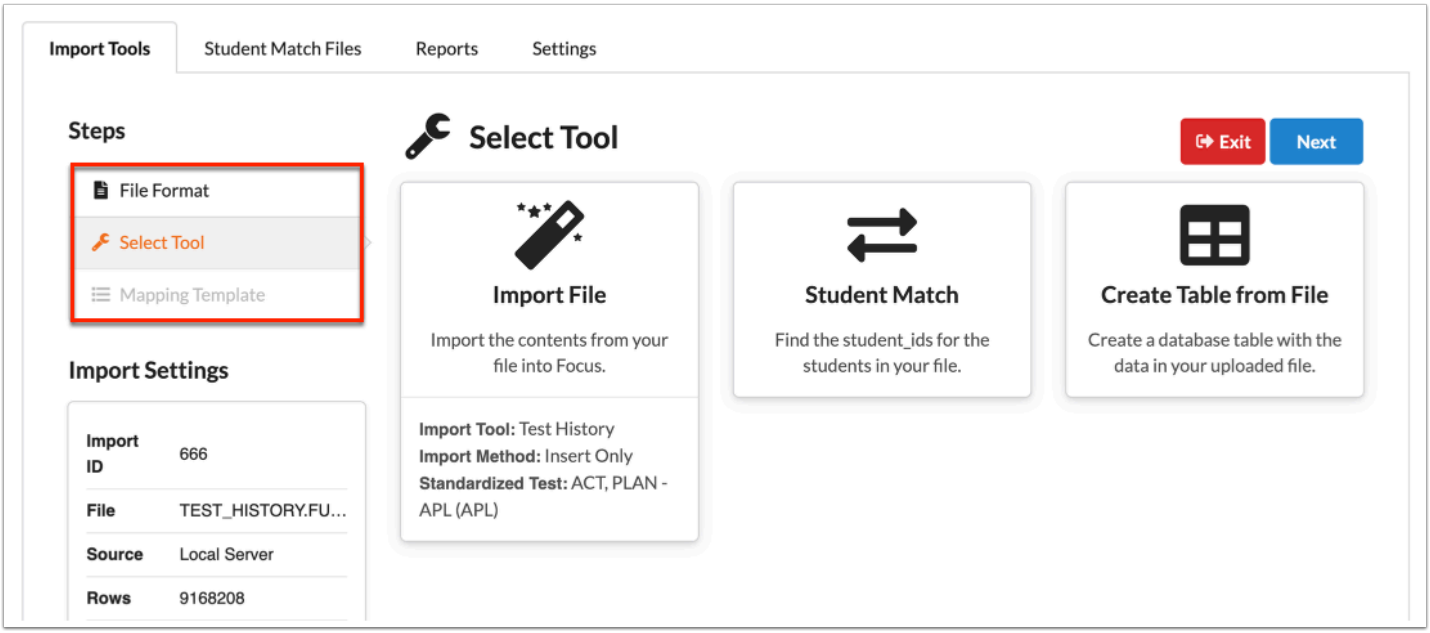
Click the **Import Tools** tab to import a file. From this tab you can find the following features:

- File Source
- Pending Imports
- Import Steps and Settings
- Import File, Student Match, and Create Table from File options

See Import Tools (Importing a File) for more details.



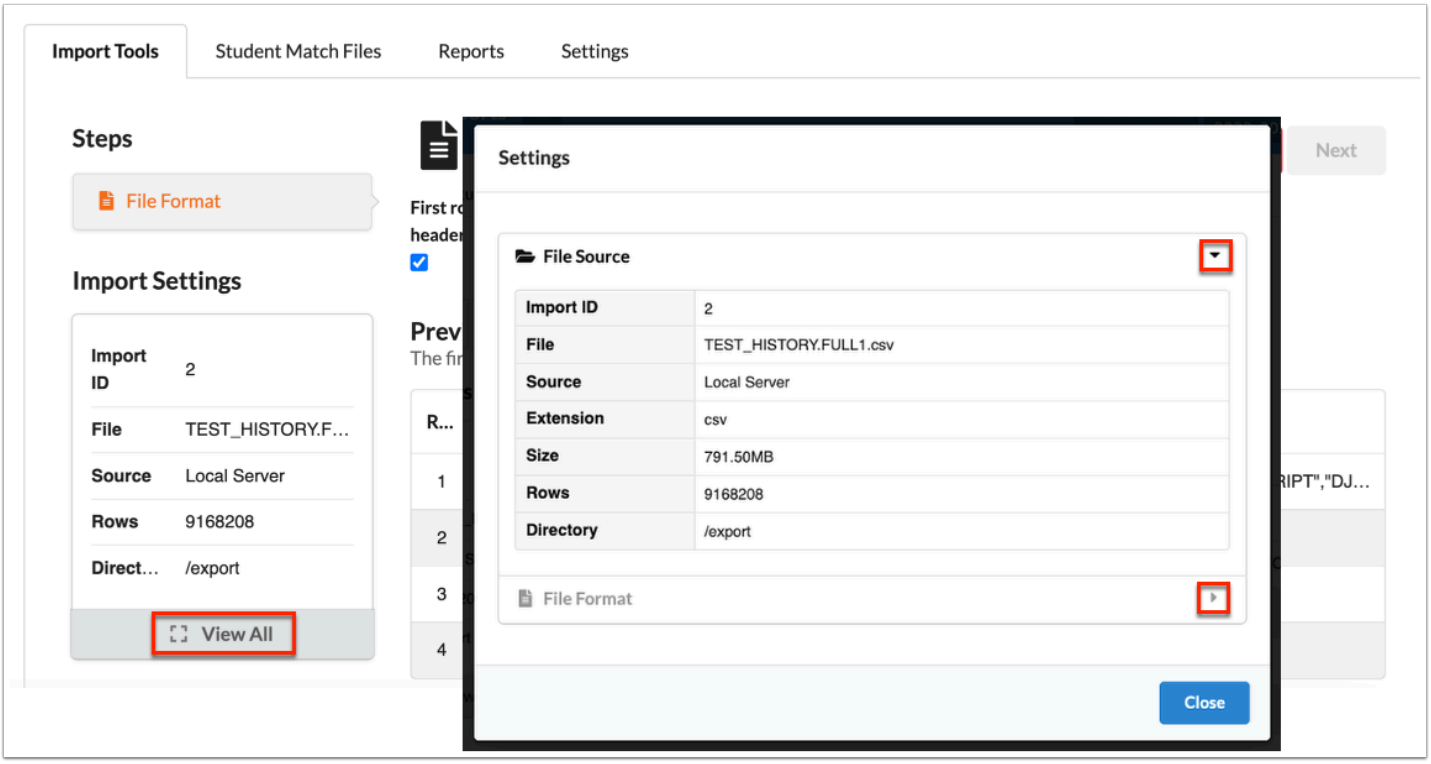
At any point during the import process on the Import Tools tab, click any of the applicable tabs in the **Steps** section to change or review information in a different step.



At any point during the import process on the Import Tools tab, you can review **Import Settings** which displays the Import ID, File, Source, Rows, Directory, etc. For additional information, click **View All**.

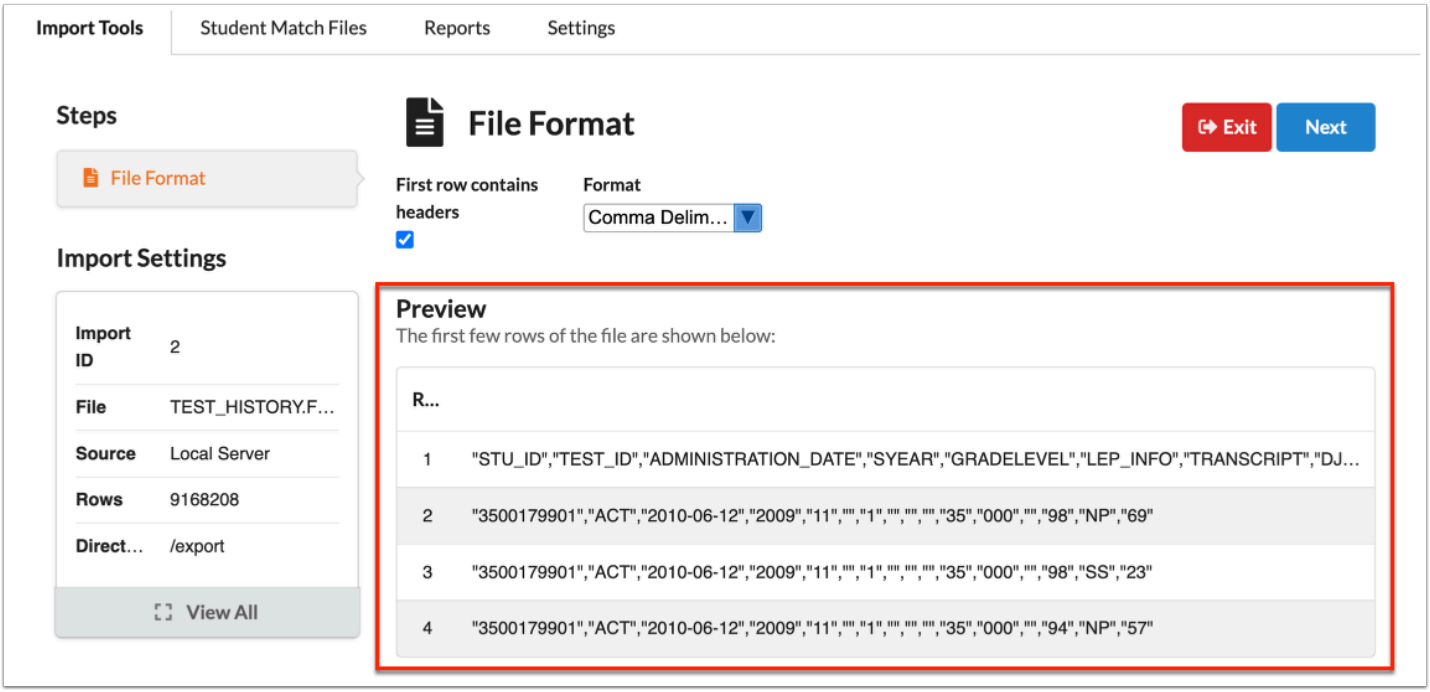
a. Click the arrows to open and close headers containing information.

b. Click **Close** once your review is complete to close the Settings pop-up window.

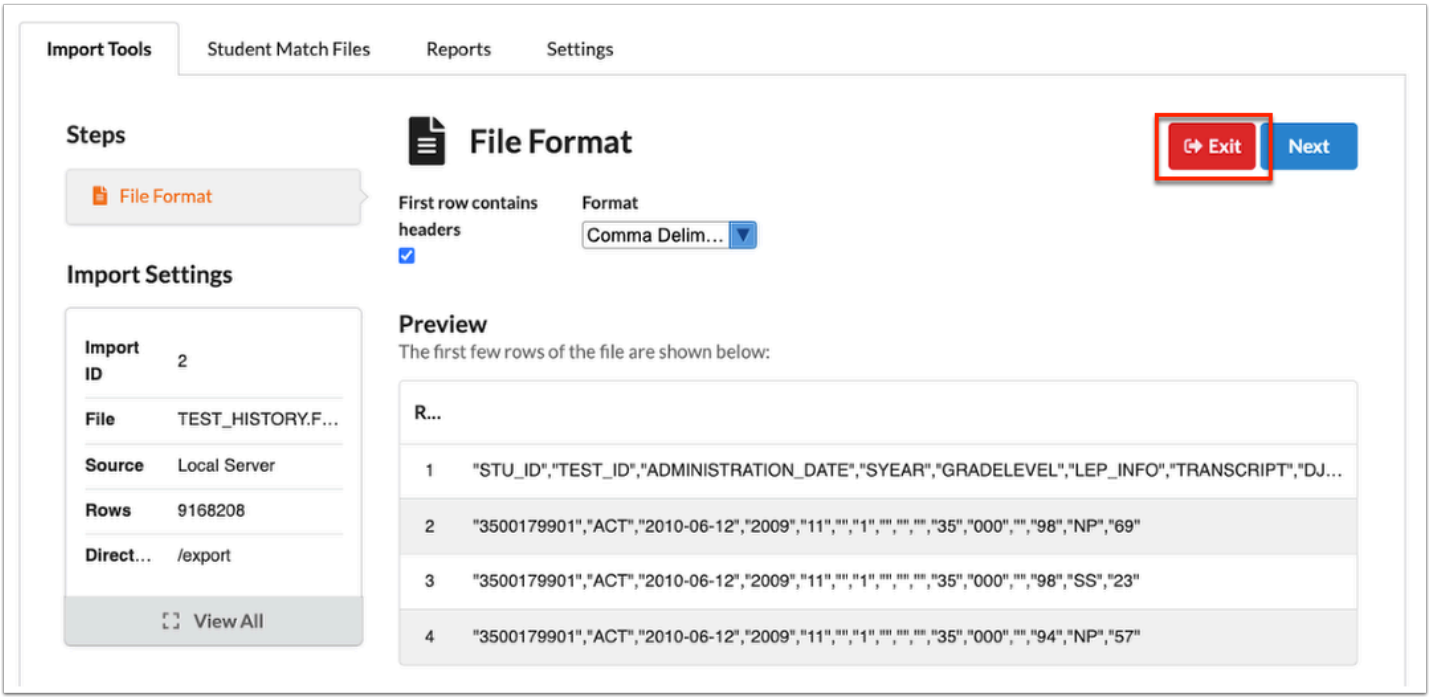


A **Preview** of the imported file is present during the File Format step during the import process on the Import Tools tab.

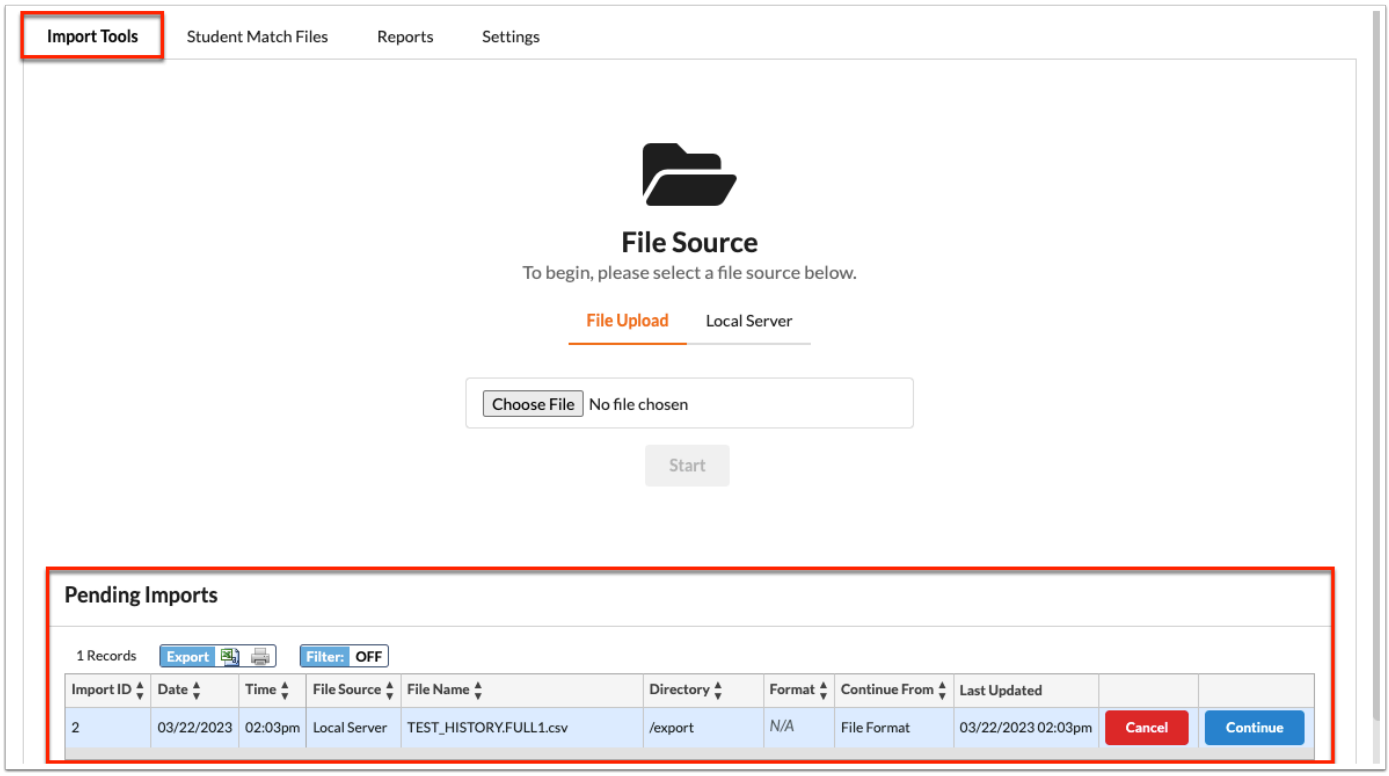
To display a Preview once this step is complete, click **View All** in the **Import Settings** section, as described above.



During the import process on the Import Tools tab, click **Exit** to exit and save the import process. If exited, you can come back at another time and finish the import.



All imports and saved in the **Pending Imports** section of the **Import Tools** tab.

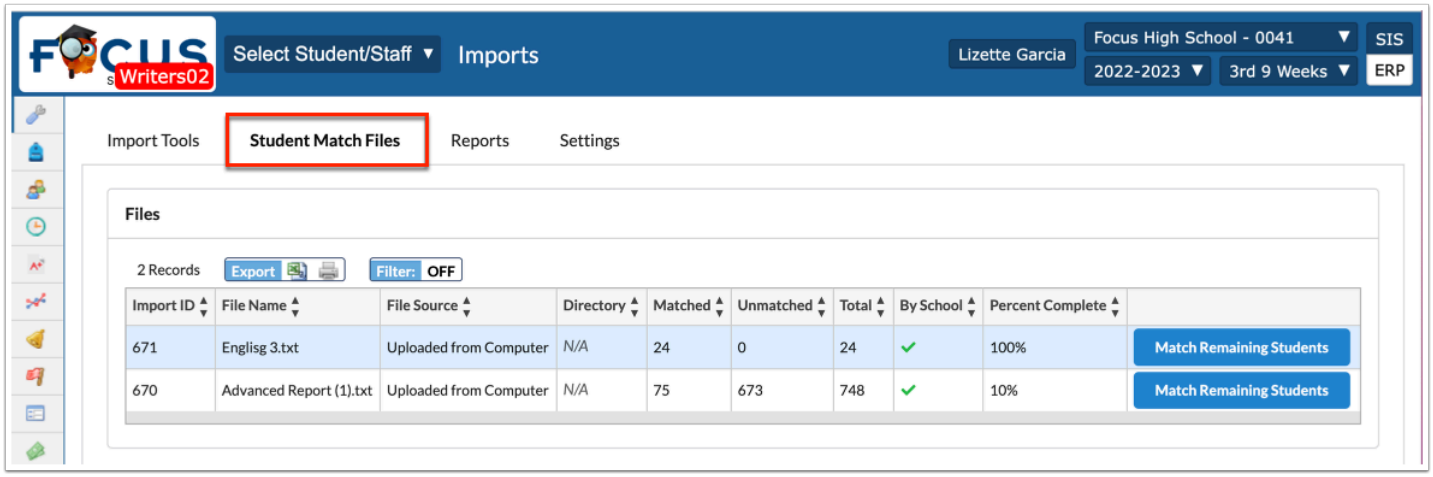


a. Click **Continue** to continue the import process. See Import Tools (Importing a File) for information on the appropriate steps.

b. Click **Cancel** to cancel and delete the import.

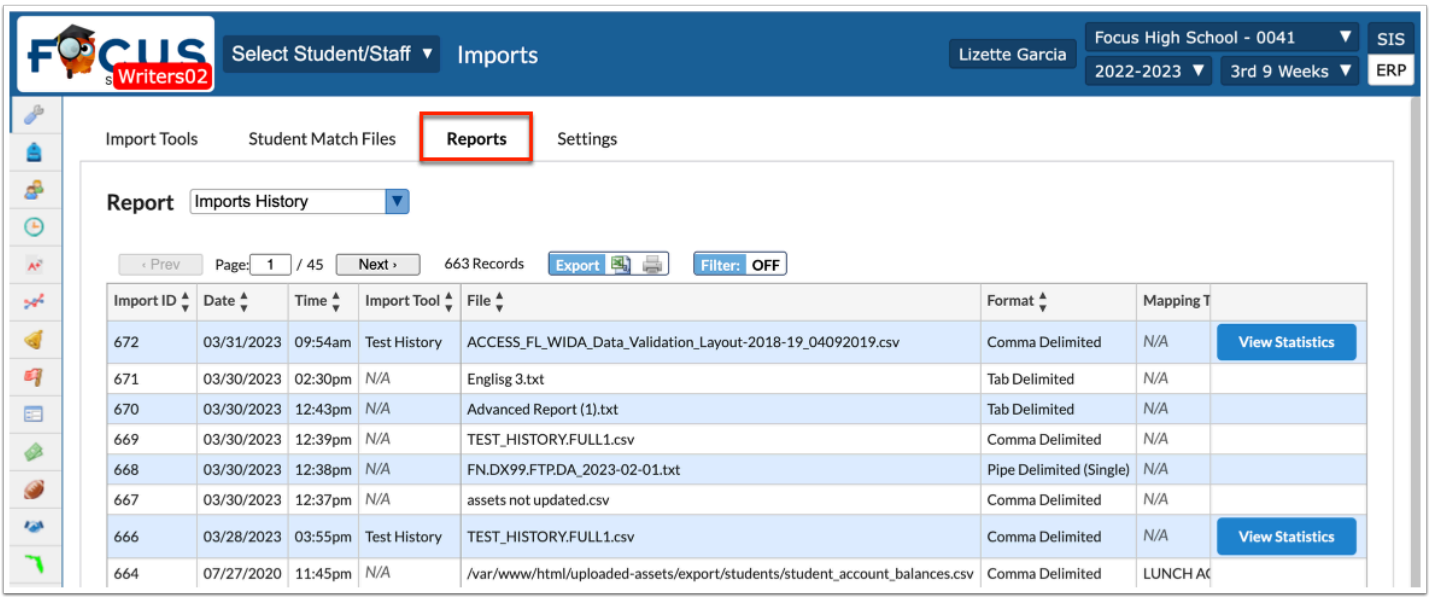
Click the **Student Match Files** tab to find student_ids for the students in an uploaded file. A Student Match import must first be conducted from the Import Tools tab before users can view the process from this tab.

See Student Match Files for detailed information.



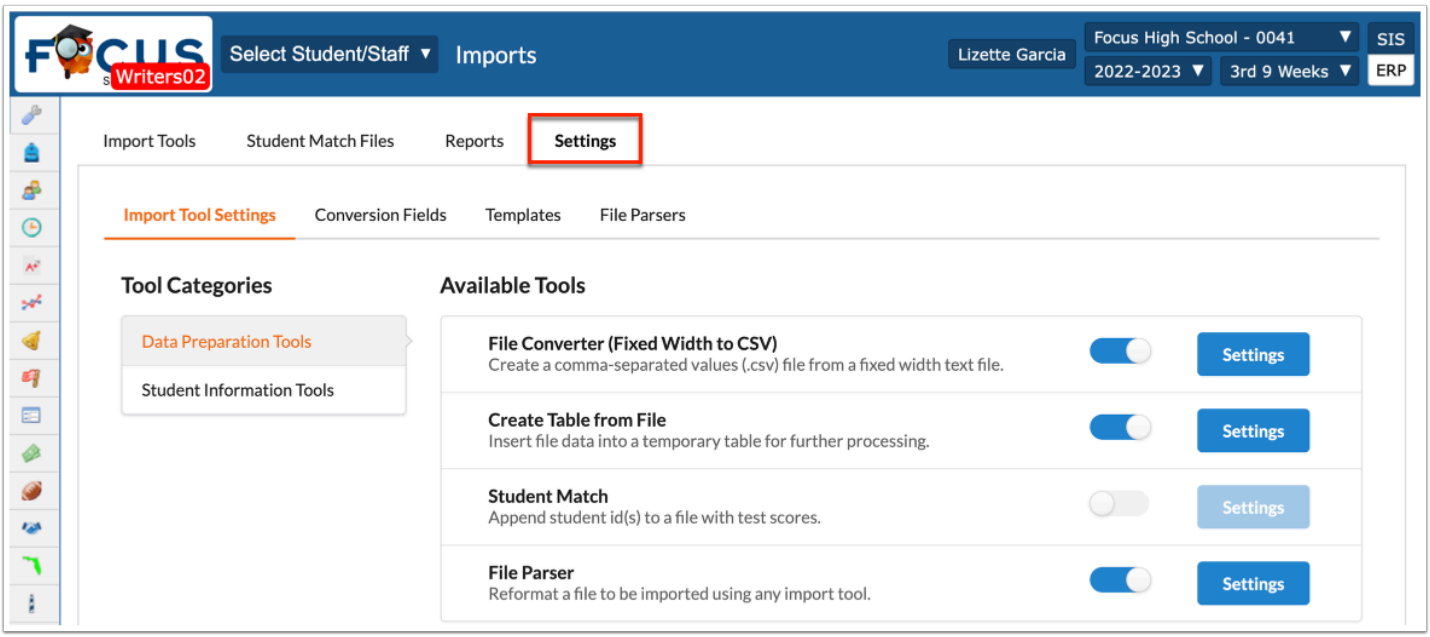
Click the **Reports** tab to review a report of imports processed including date, time, import tool, file, etc.

See Reports for detailed information.



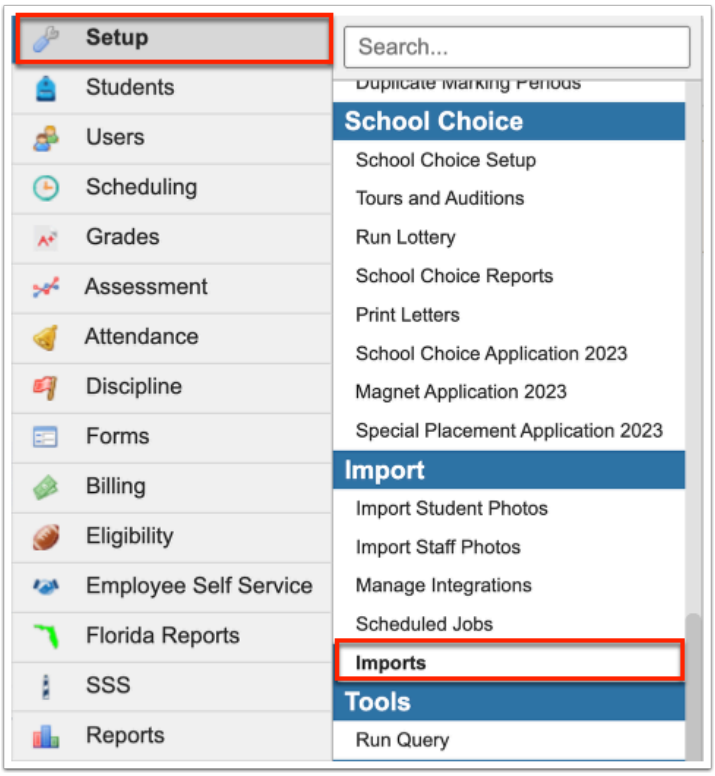
Click the **Settings** tab to enable and review Import Tool Settings, review and set Conversion Fields, view, edit, and create Templates for mapping fields, and view and create new File Parsers.

See Settings for detailed information.

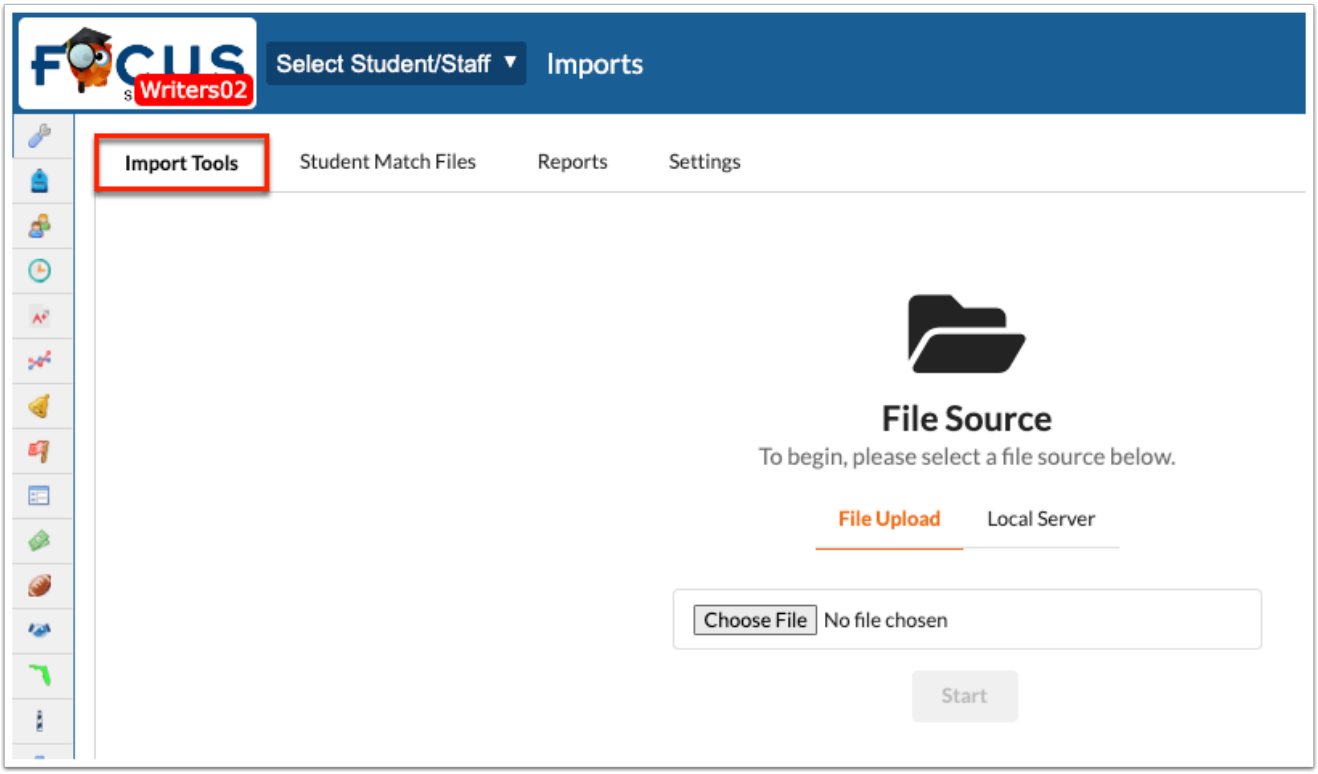


Import Tools (Importing a File)

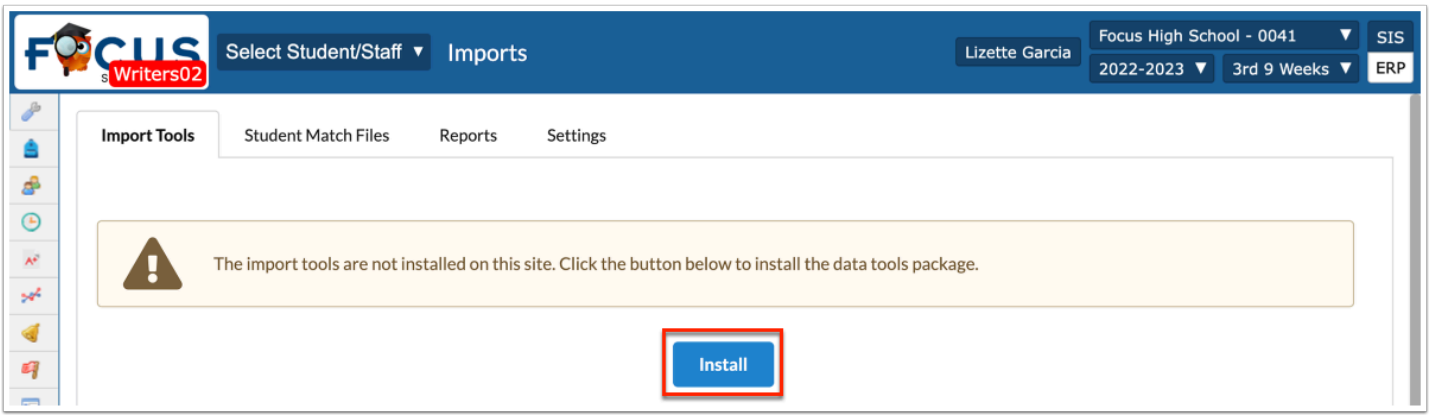
1. In the **Setup** menu, click **Imports**.



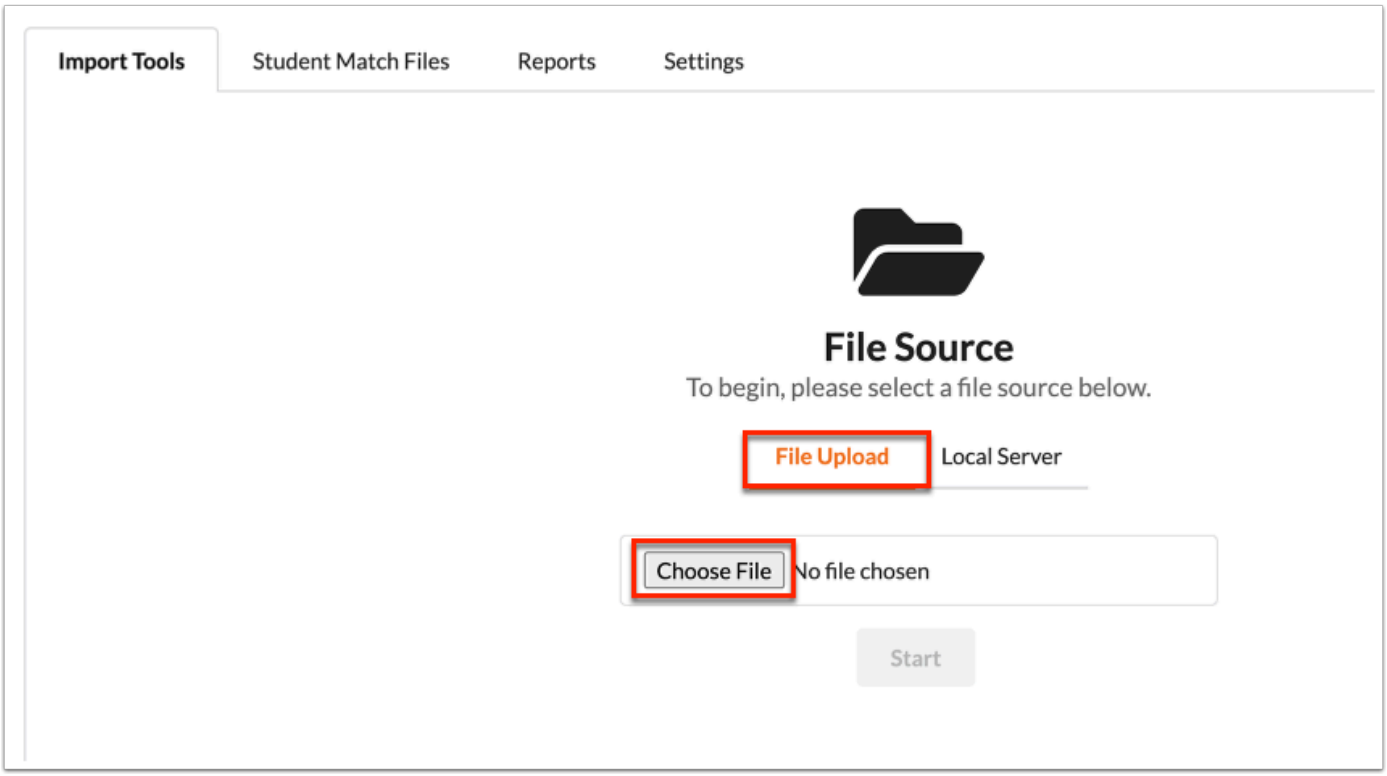
2. The Imports screen defaults to the **Import Tools** tab.



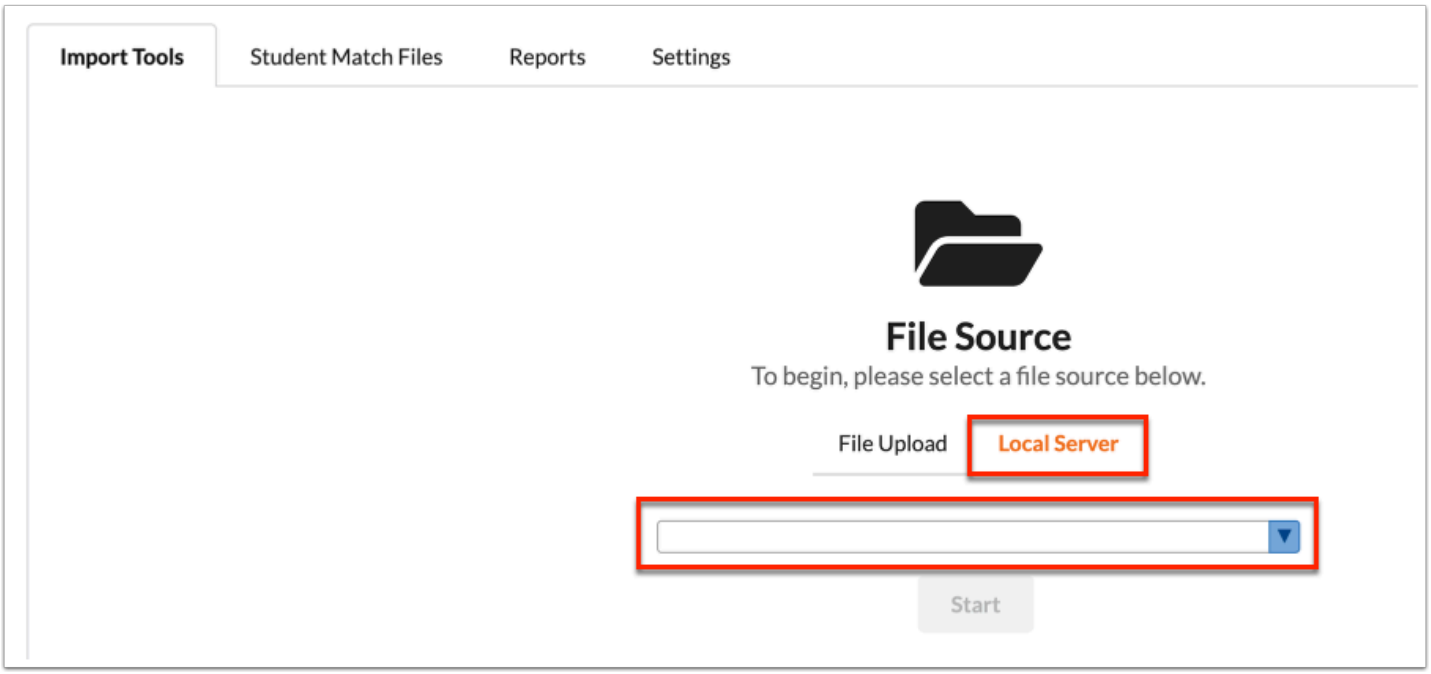
3. Click **Install** to install import tools on your site. This is required upon using Imports for the first time and will not be required again.



4a. From the **File Upload** tab, click **Choose File** to select a file from your computer.

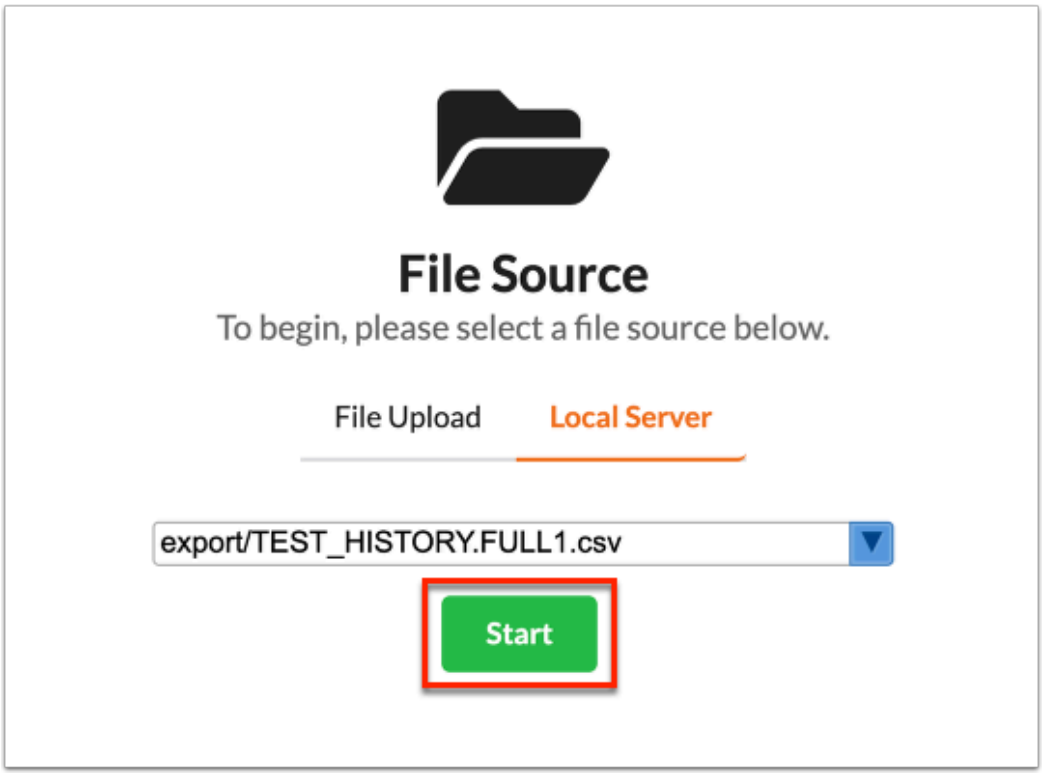


4b. Click **Local Server** to select a file from the server, then select the file from the provided pull-down.



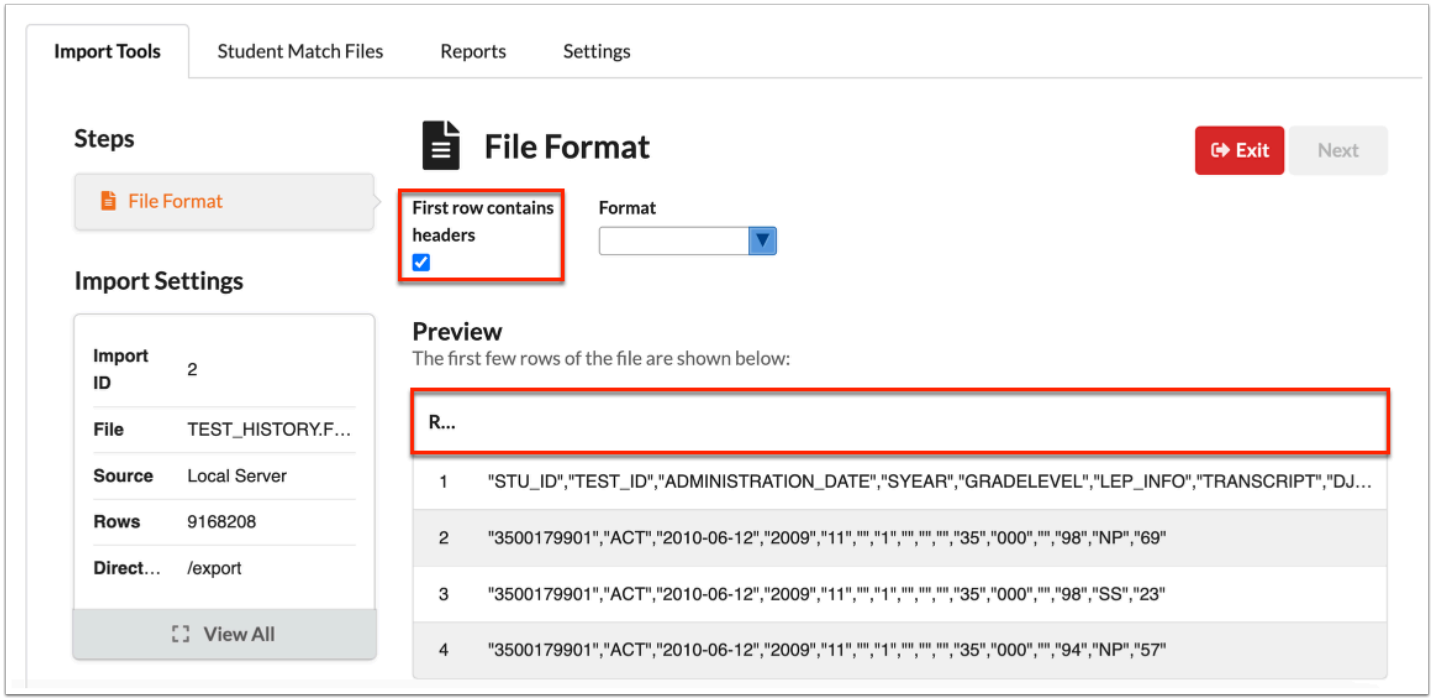
It is important that the file selected be in one of the acceptable formats: CSV, Tab-Delimited, Pipe-Delimited, or Fixed Width.

5. Click **Start**.

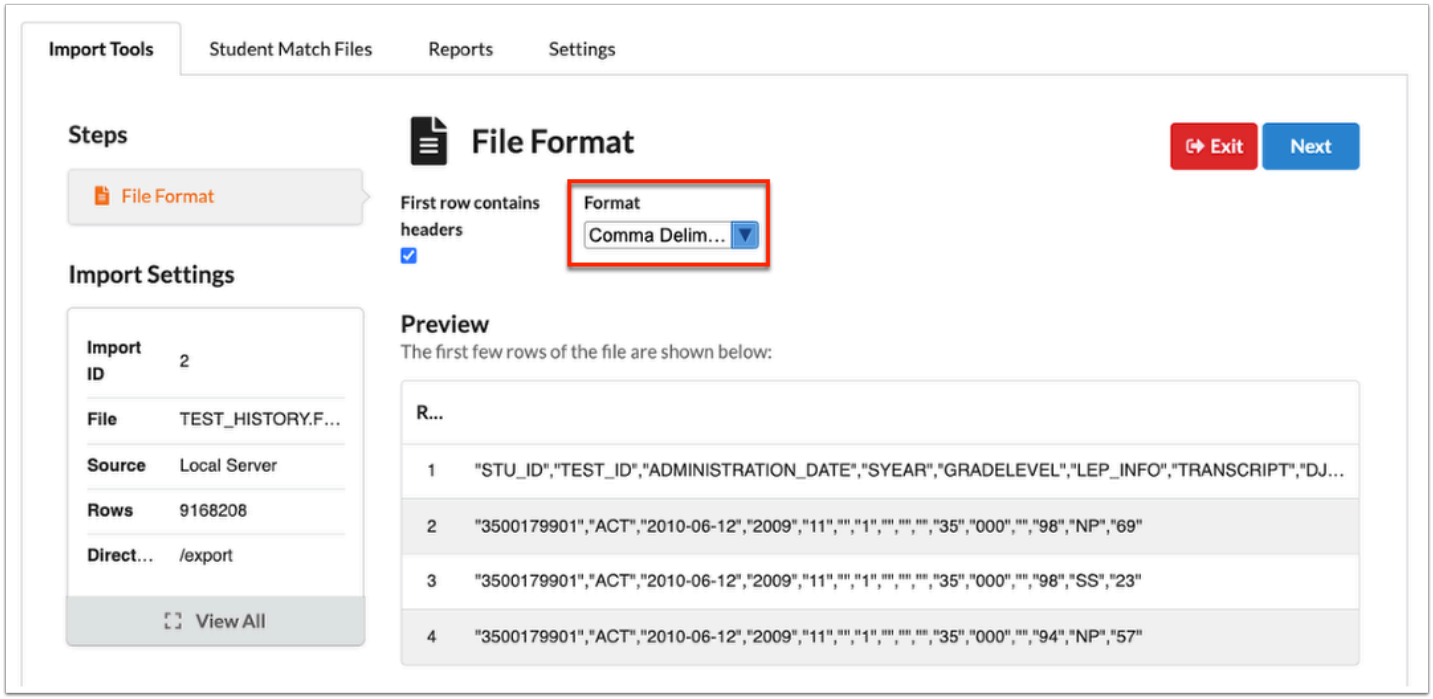


6. If the file selected contains a header, select the **First row contains headers** check box.

Review the **Preview** section to determine if your file contains a header.



7. Select the **Format** of the file selected from the provided pull-down. Options include Comma Delimited, Fixed Width, Pipe Delimited (Single), and Tab Delimited.



Comma Delimited: A type of data format in which each piece of data is separated by a comma; usually a CSV (Comma Separated Values) file. For example,

</>Name, School, Grade</>

Fixed Width: A type of fixed width text file that is arranged in rows and columns with one entry per row. Each column has a fixed width, specified in characters. No delimiters are used to separate the fields in the file.

Pipe Delimited (Single): A type of data format in which each piece of data is separated by a pipe: |. Usually a TXT file. For example,

</>Name | School | Grade</>

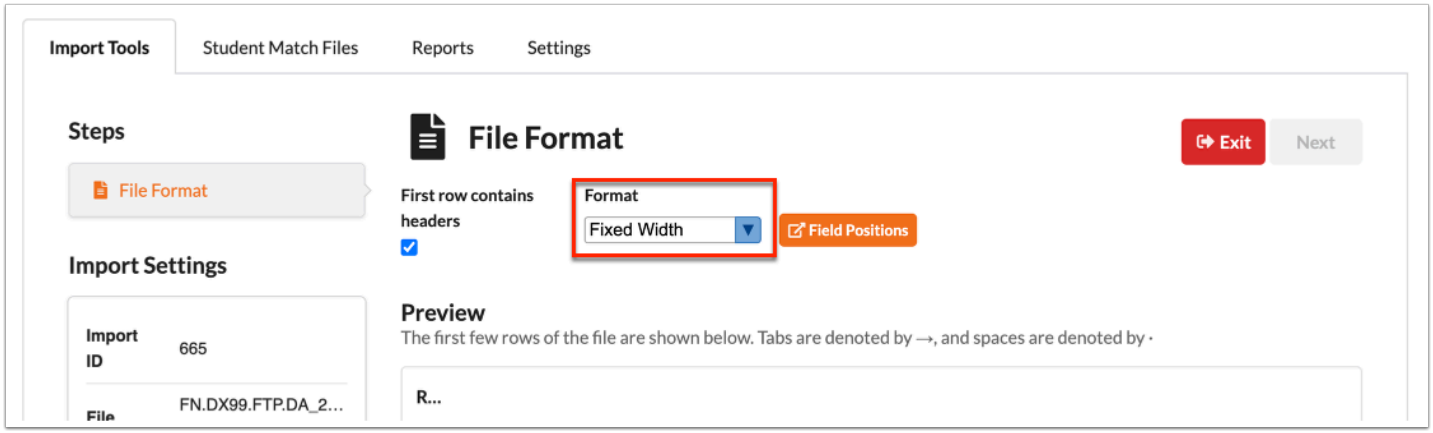
Tab Delimited: A type of data format in which rows are represented by the lines in the file and columns are created by separating the values on each line by a tab (long space character); usually a TXT file. For example,

</>Name School Grade</>

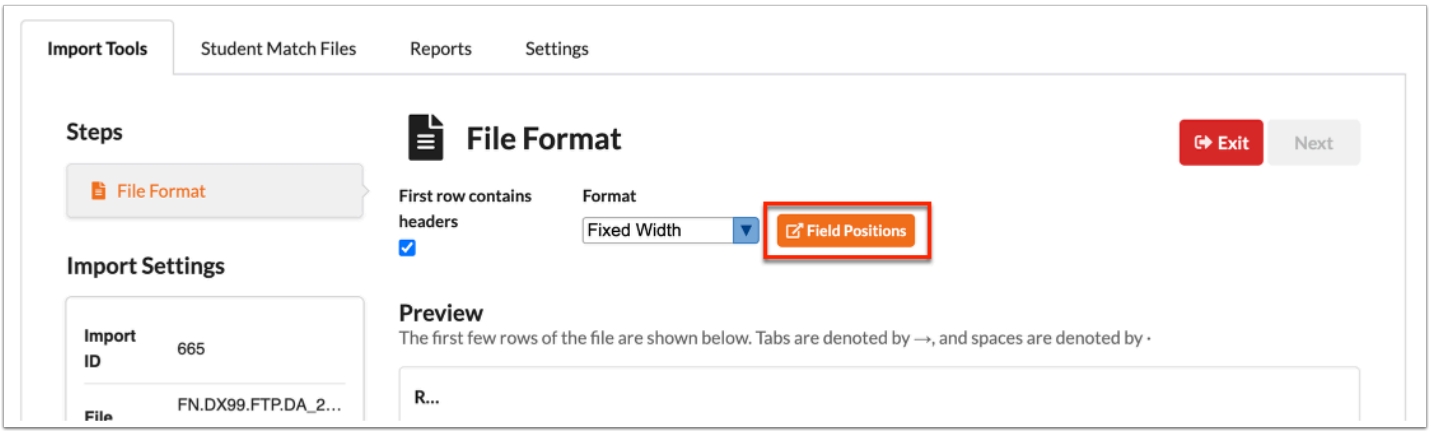
File Converter: Fixed Width to CSV

Selecting Fixed Width as the Format will convert an uploaded fixed-width file into a customized and downloadable CSV file.

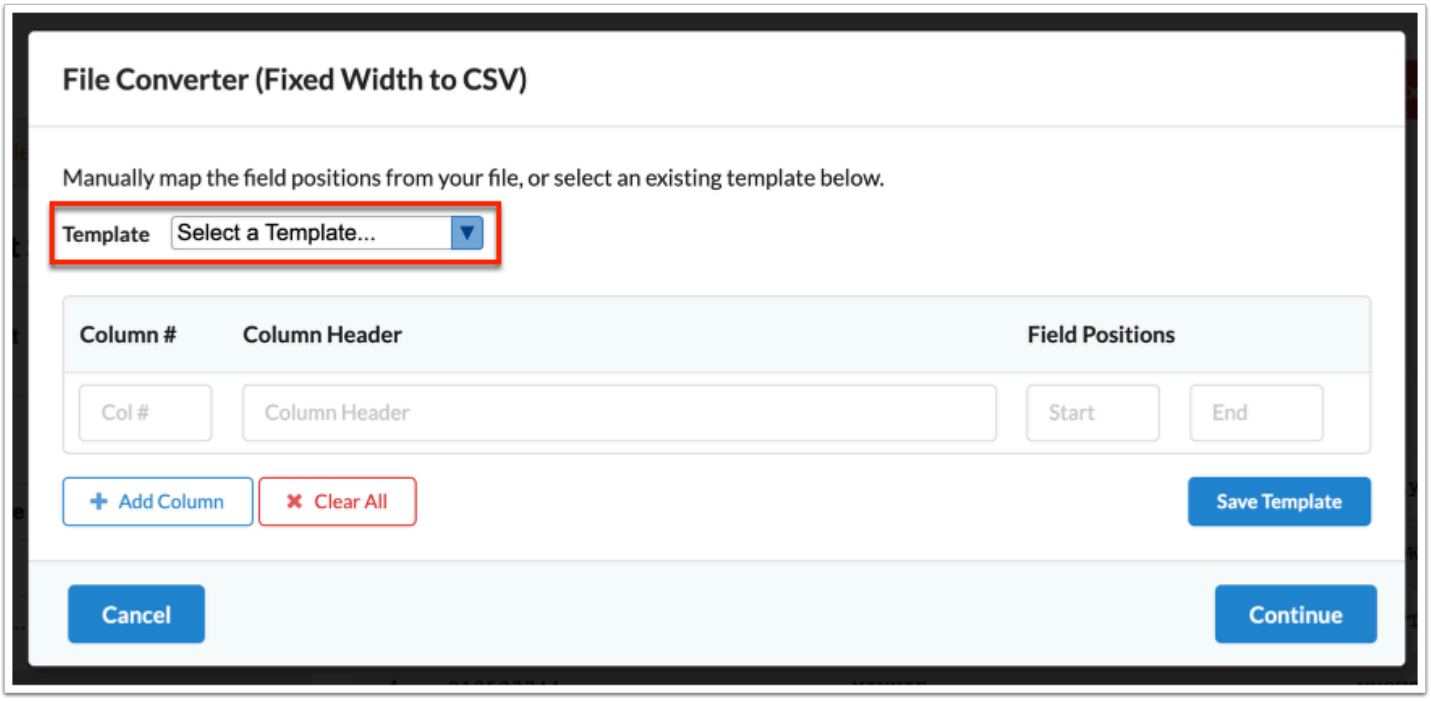
1. Select **Fixed Width** from the **Format** pull-down.



2. Click **Field Positions** to customize the column delimitation.



3. To use an existing template to map the fields, select the applicable **Template** from the pull-down.

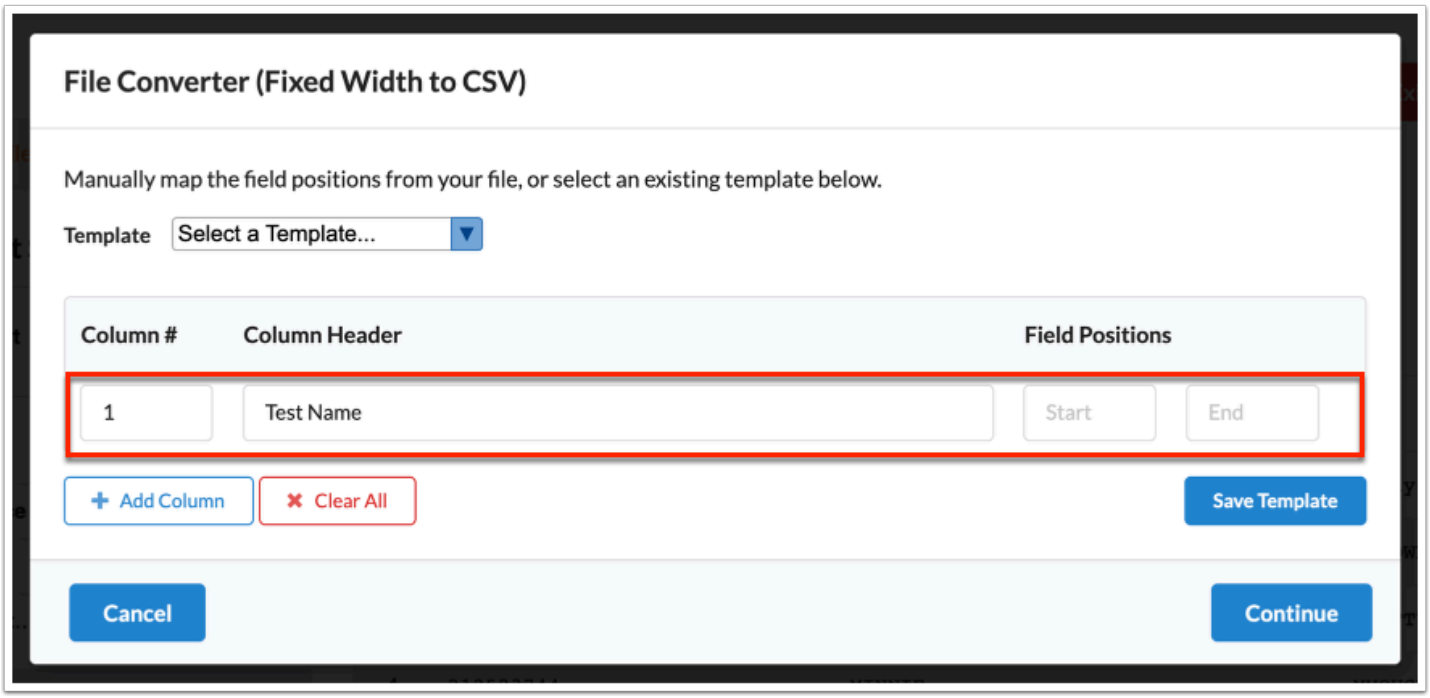


4. To manually map the fields, enter the **Column #** in the provided text box.

The **Column #** refers to the data element position described in the file layout. For example, if the school year is the 3rd data element which spans from position 10 to position 13, then column # should be 3, start position would be 10, and end position would be 13. The column header can be any text the you enter with a 60-character limit.

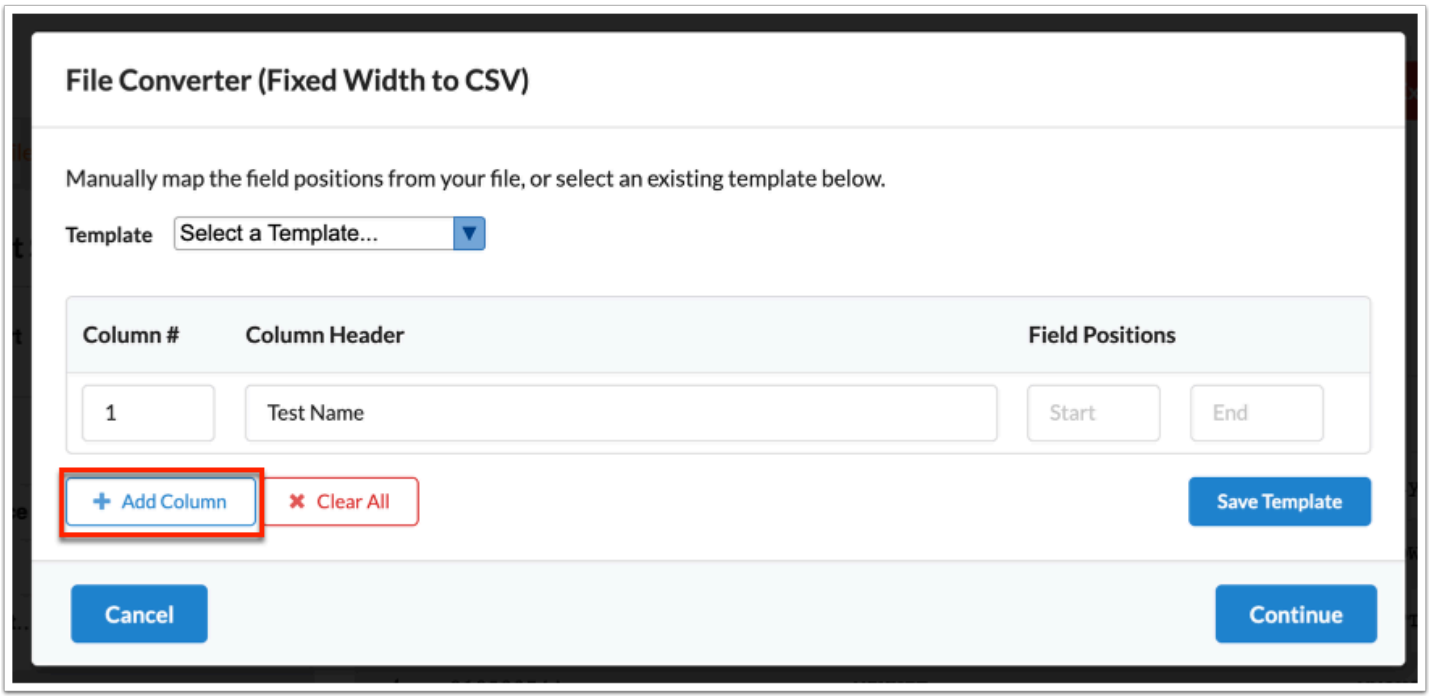
5. Enter the **Column Header** in the provided text box. Each column should aways have its matching header title.

6. You can customize the column delimitation by typing in the **Start** and **End** positions of the columns.

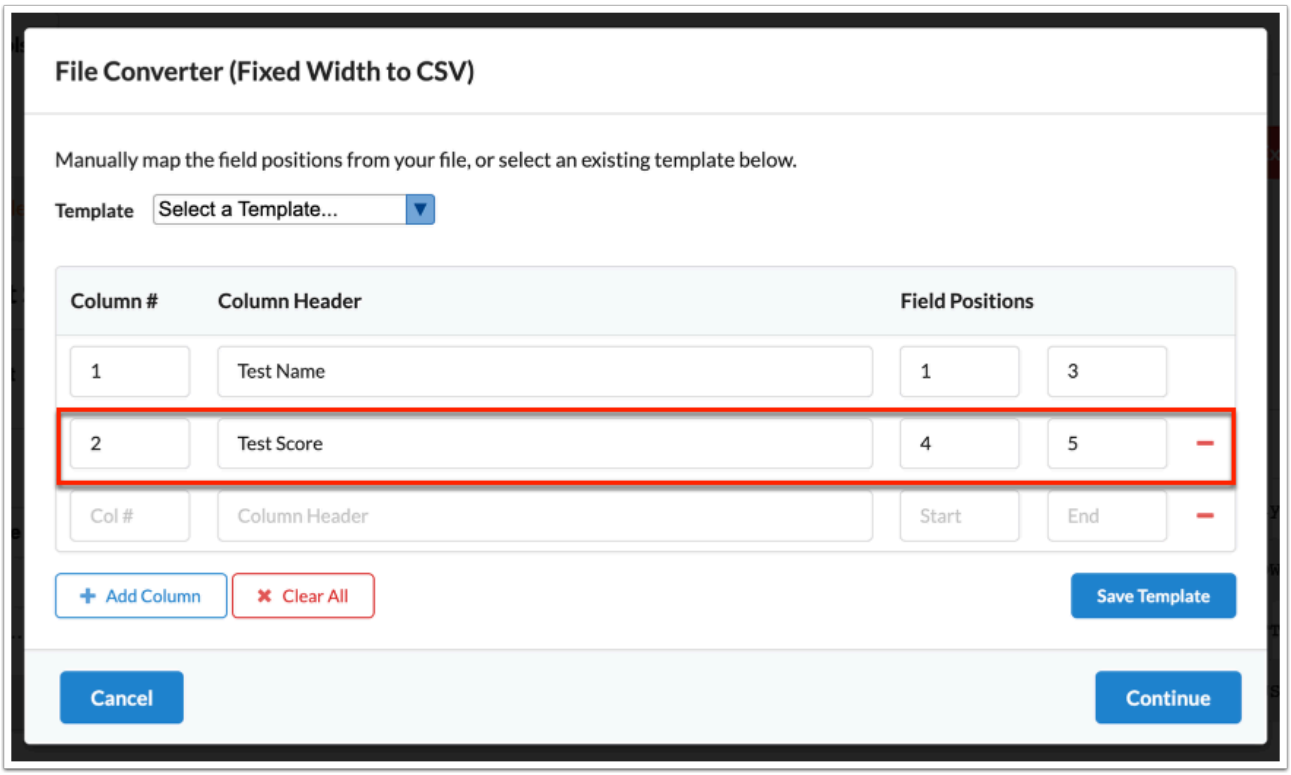


The Column #, Column Header, Start and End dates are all required fields.

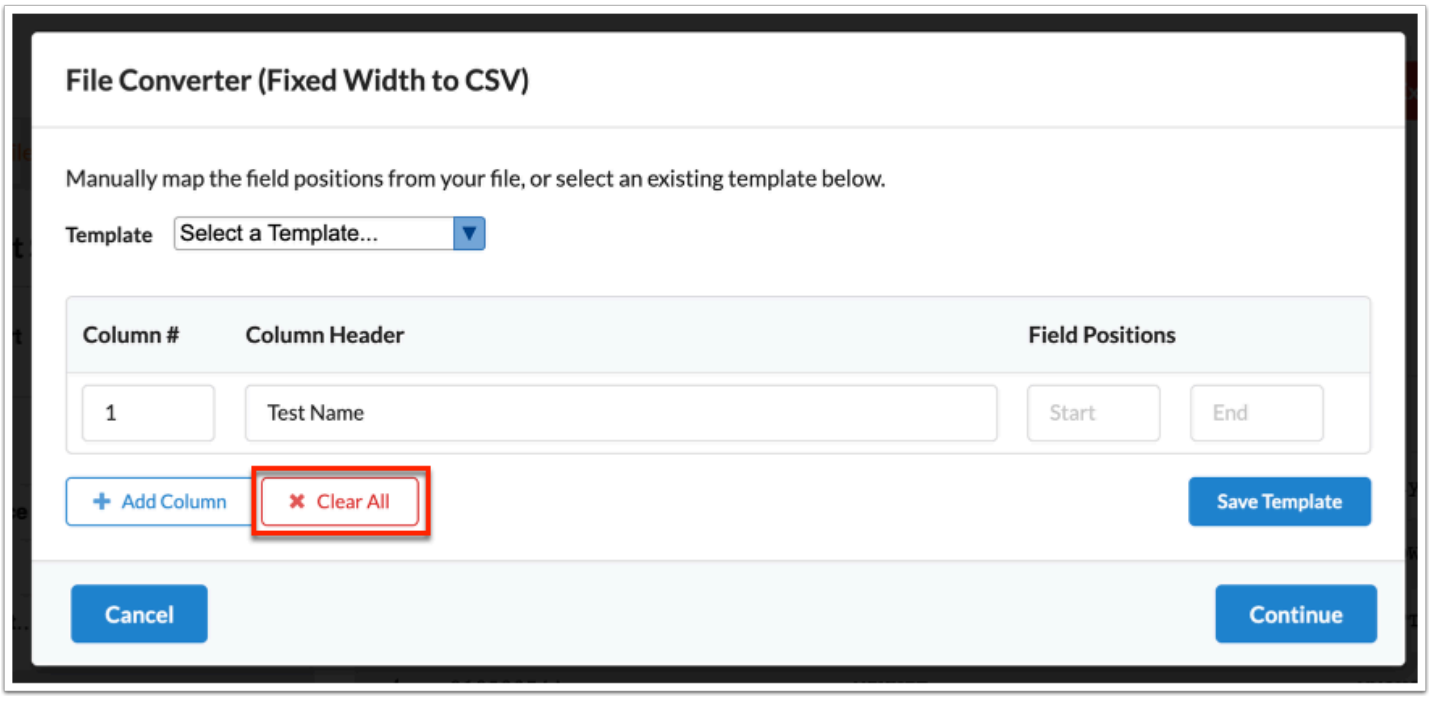
7. Click **+Add Column** to add more field position (data element) definitions that strictly exist in the file. Column numbers can be skipped if certain data elements are not required for the import.



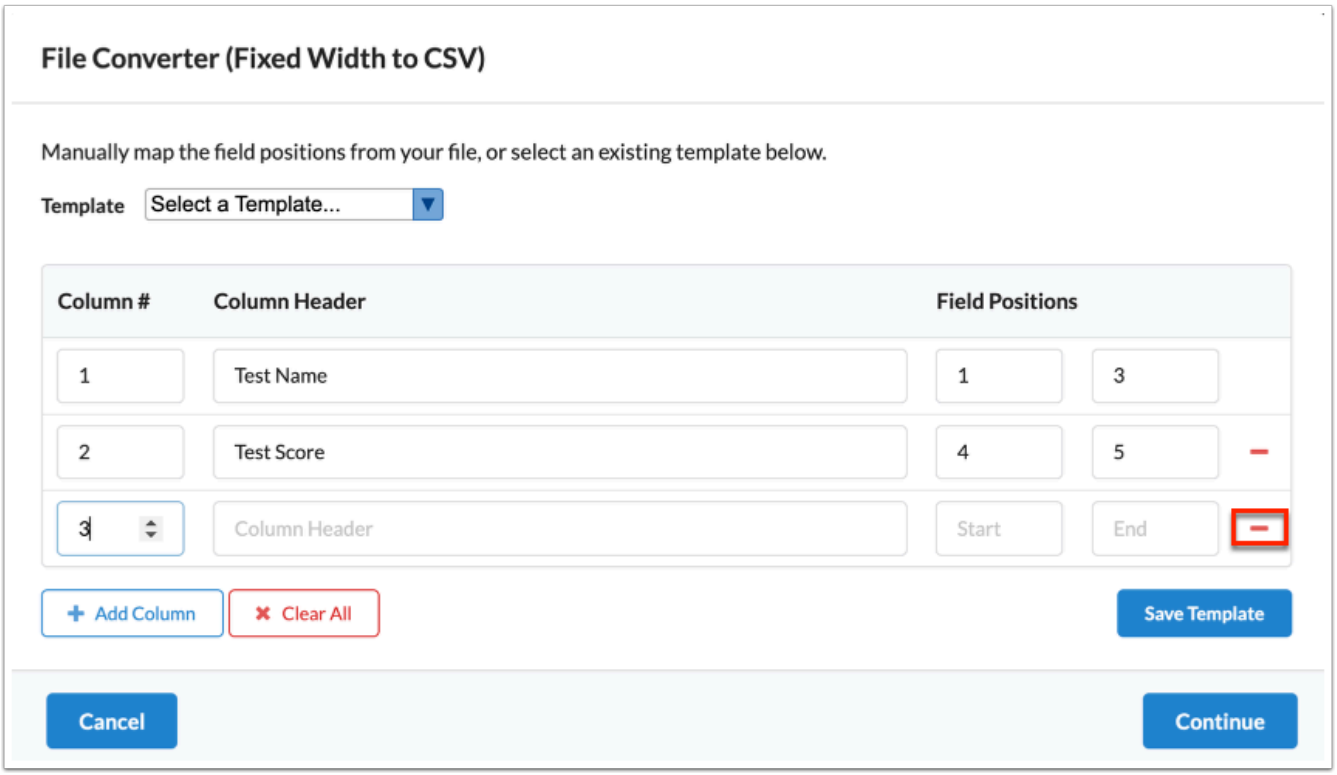
a. In the added row, enter the **Column #**, **Column Header**, and **Start** and **End** positions.



b. Click **Clear All** to clear all Mapped Field text boxes and start over.

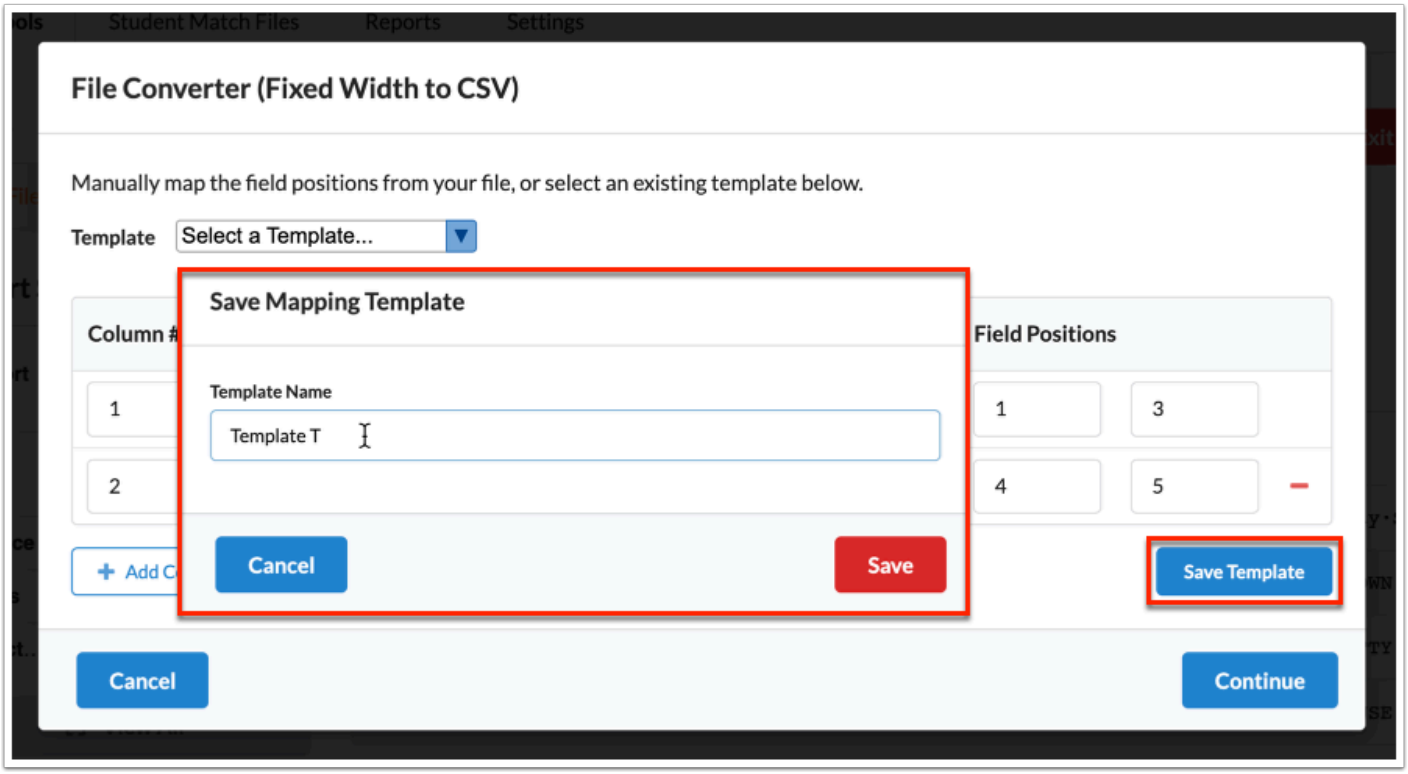


c. Click the **delete** button to remove the added column.

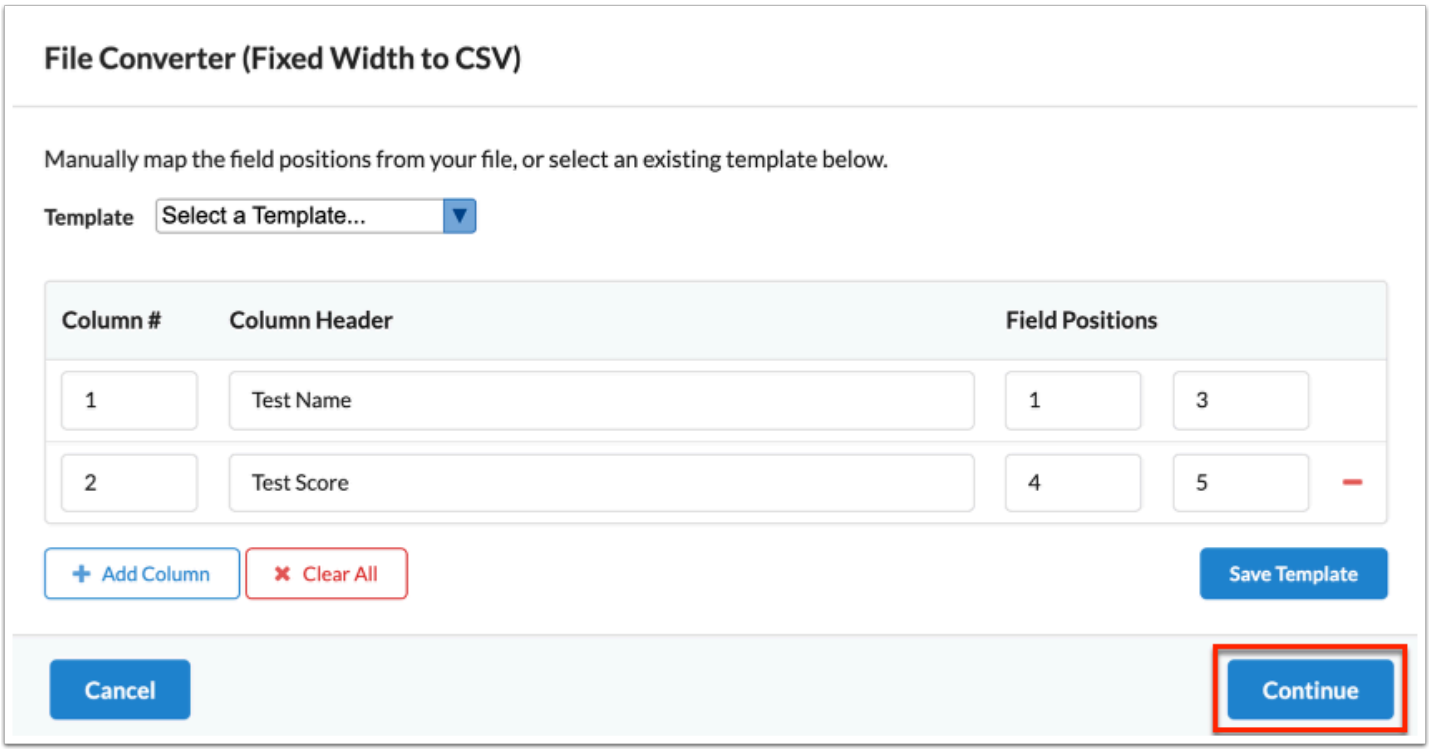


8. Click **Save Template** to save this as a template for future use.

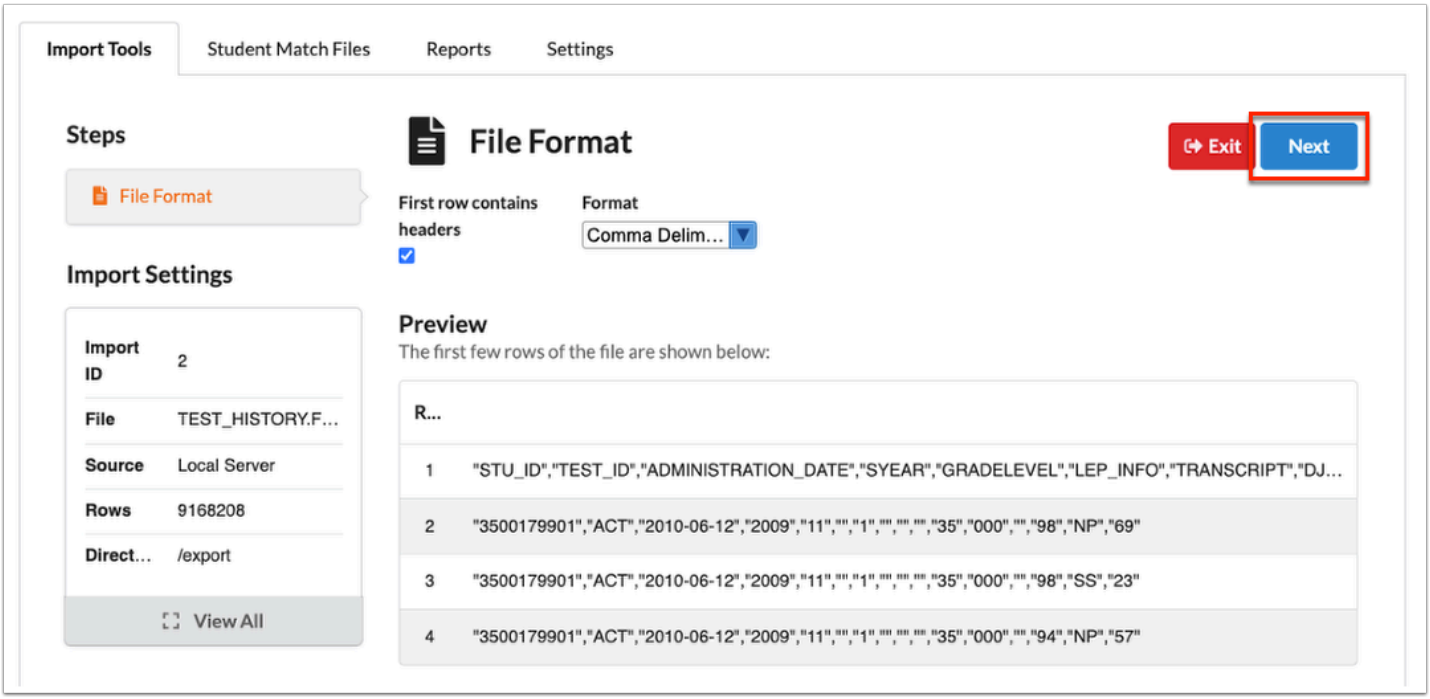
a. Enter the **Template Name** and click **Save.**



9. Click **Continue**.



8. Click **Next** to continue the import.

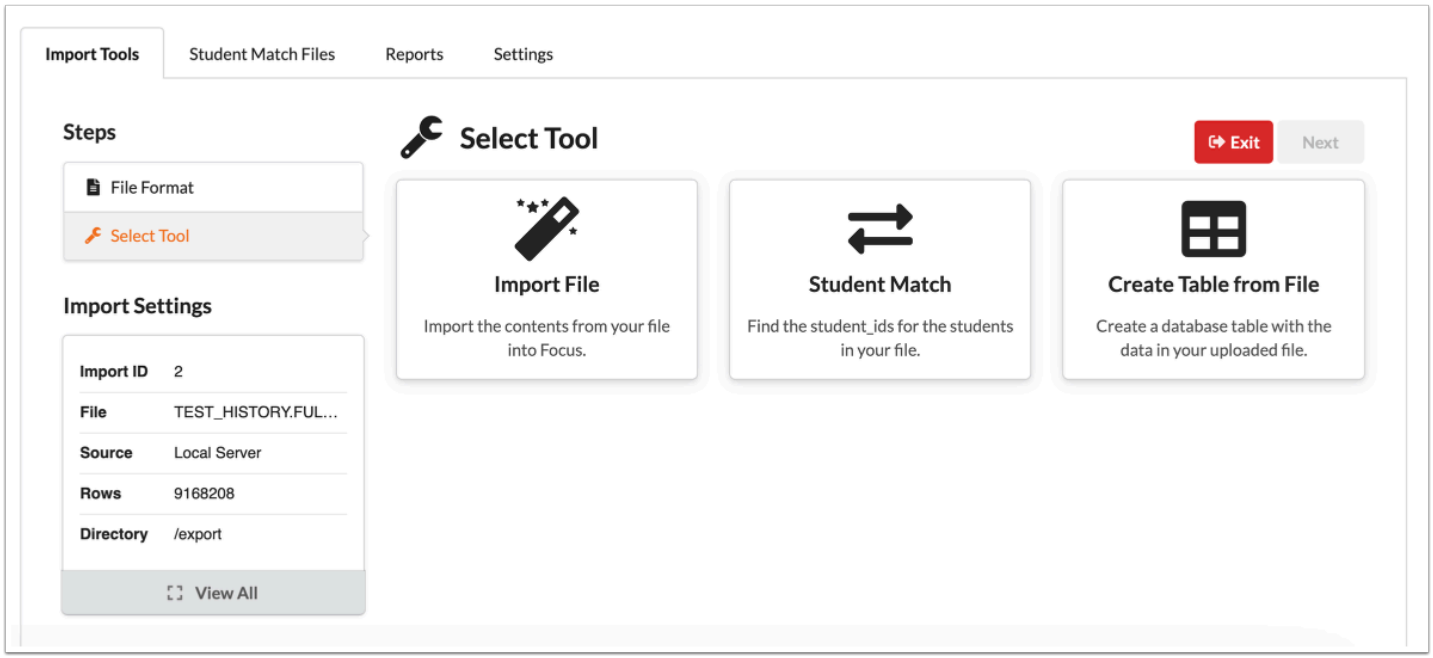


9. Select the applicable tool.

a. Click **Import File** to import the contents from the uploaded file into Focus. See Import Tools: Import File for more information.

b. Click **Student Match** to find student_ids for the students in the uploaded file. See Import Tools: Student Match for more information.

c. Click **Create Table from File** to create a database table using the data from the uploaded file. See Import Tools: Create Table from File for more information.

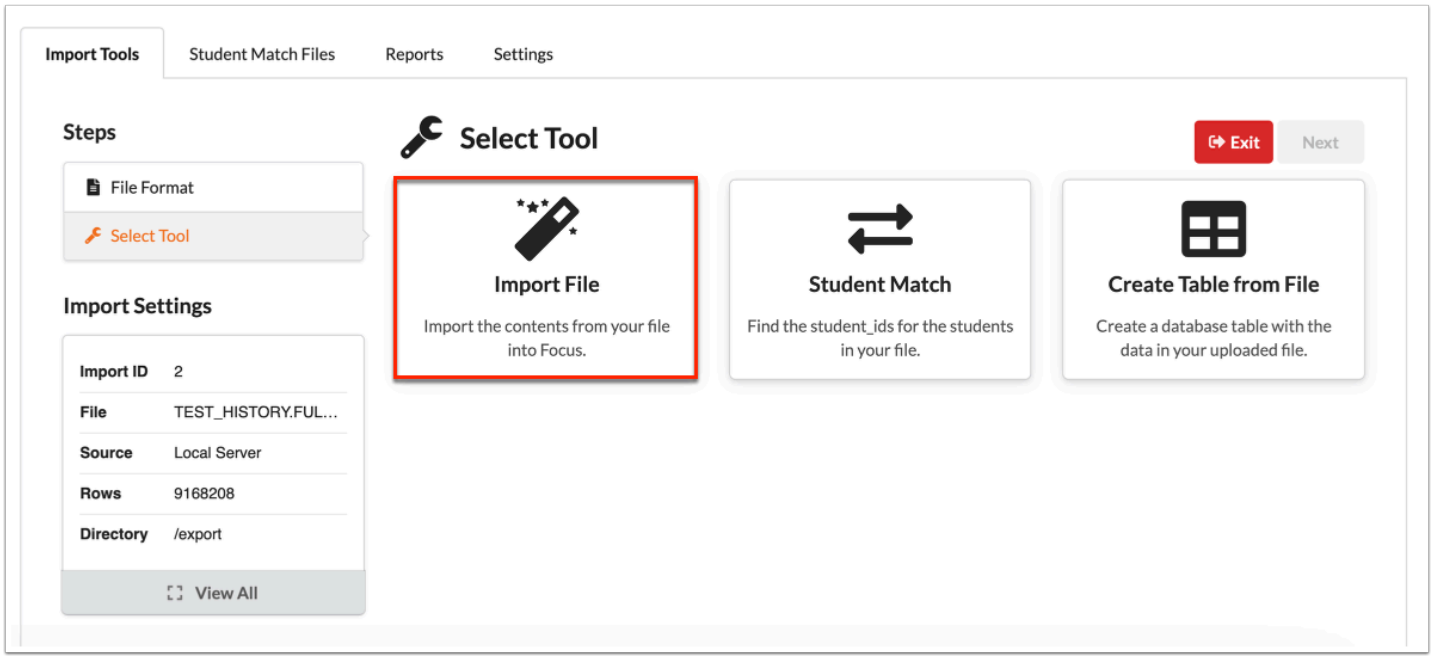


There is no order in which the import tools must be utilized. For example, a test history file that needs matching can be matched first and then have the import tool settings assigned, or vice versa, meaning the file can be matched first or last.

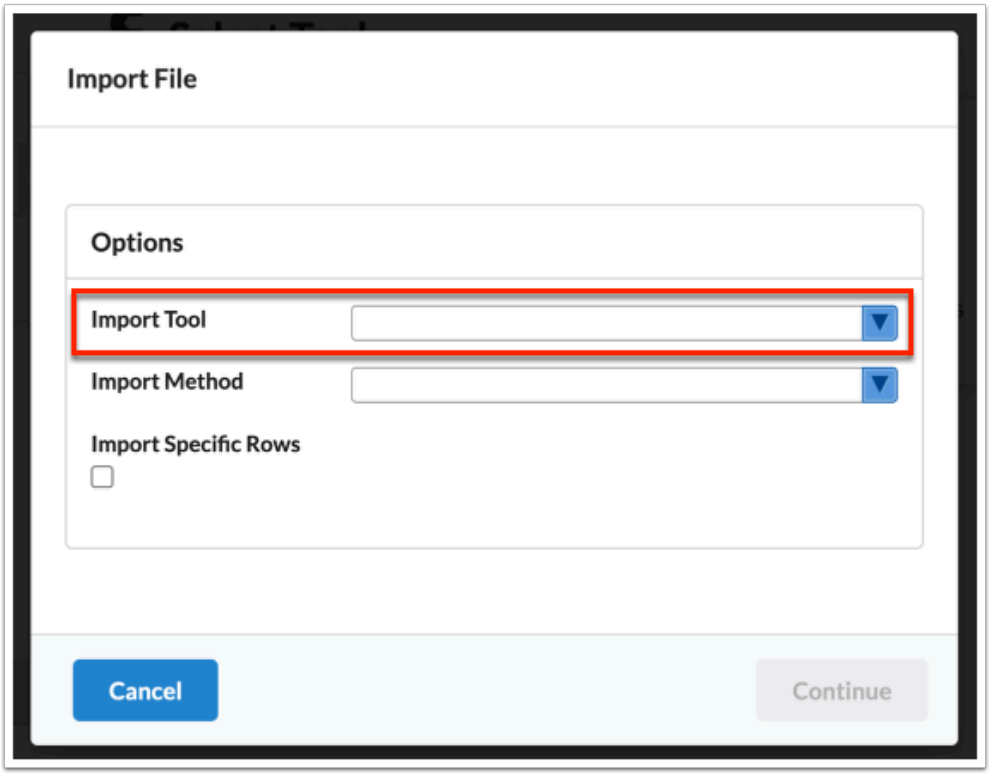
Import Tools: Import File

1. Follow the steps described in Import Tools (Importing a File).

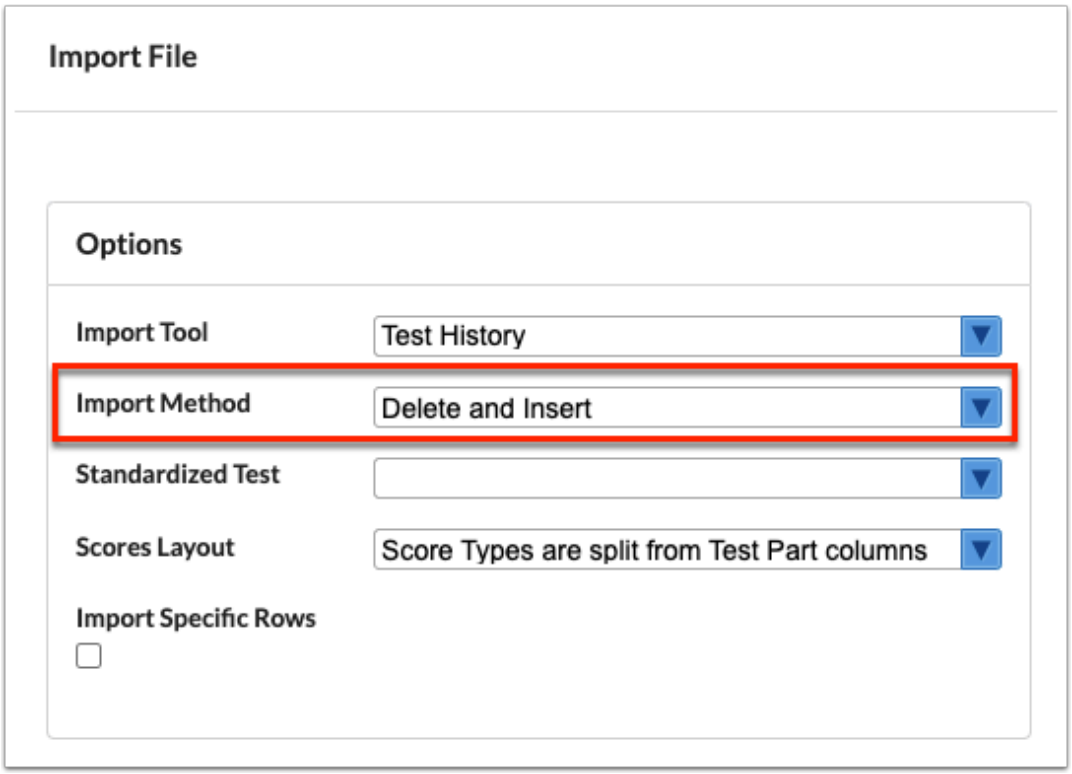
2. Click **Import File**.



3. Select an **Import Tool** from the provided pull-down.



4. Select the correct **Import Method** from the provided pull-down. Options include Delete and Insert, Insert Only, Update Only, and Update or Insert.



a. Delete and Insert: Deletes existing records, then inserts new ones.

b. Insert Only: Insert all file records that do not exist in the database.

c. Update Only:Updates existing records using file data.

d. Update or Insert: First updates existing records, then inserts new ones.

The Imported column of a table will contain the following values to represent the import method that was used:

D: Delete and Insert

I: Insert Only

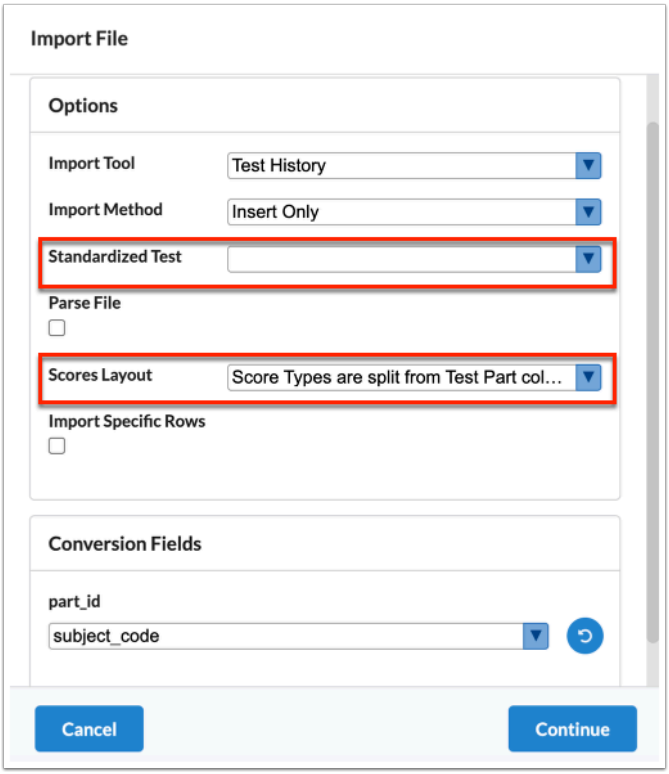
U: Update Only

P: Update or Insert

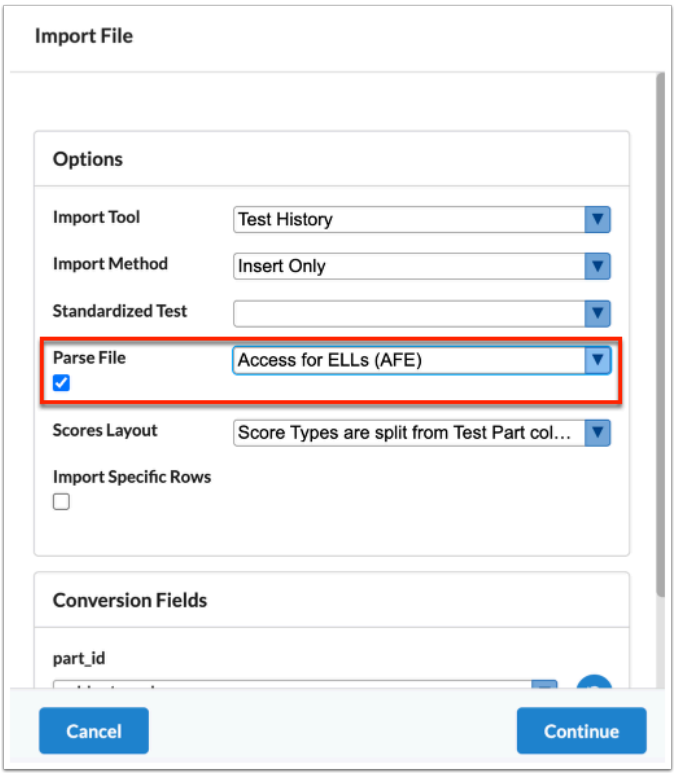
All of these methods will take the specific tool's import keys as reference to determine what it's going to do with the existing data that's in the database.

Depending on the selected and applicable Import Tool, additional pull-downs may display, such as **Standardized Test** and **Score Layout** for **Test History**.

> See Import Tool Requirements for more information about all the available Import Tools, including Test History.



5. Select the **Parse File** check box to standardize the file format of any test score file and make the process of importing test scores more efficient.

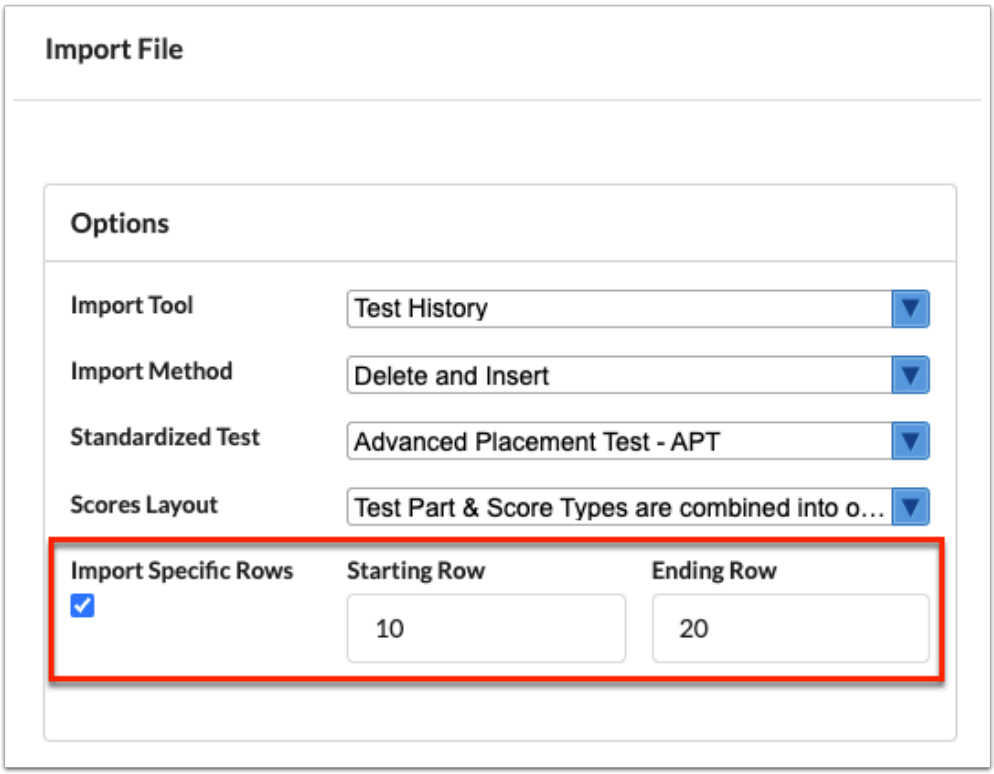


a. Select the applicable parsed file from the pull-down.

Parsers need to be created via Imports > Settings > File Parsers before they appear in the pull-down. If a parser is not available, you should review the parser settings.

6. Select the **Import Specific Rows** check box to import specific rows of the file.

a. Enter the number span in the Starting Row and Ending Row text boxes. For example, enter 10-20 in the text box to insert only rows 10-20.



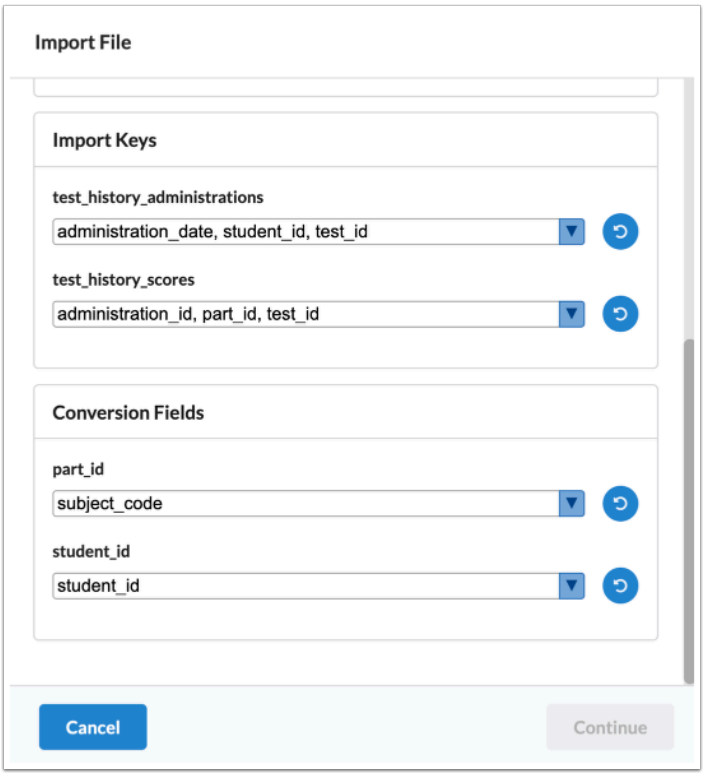
Import Keys and **Conversion Fields** are dependent on the Import Tool selected. In this case, Test History.

See Import Tool Requirements for information about the import keys and conversion fields applicable to all import tools, including Test History.

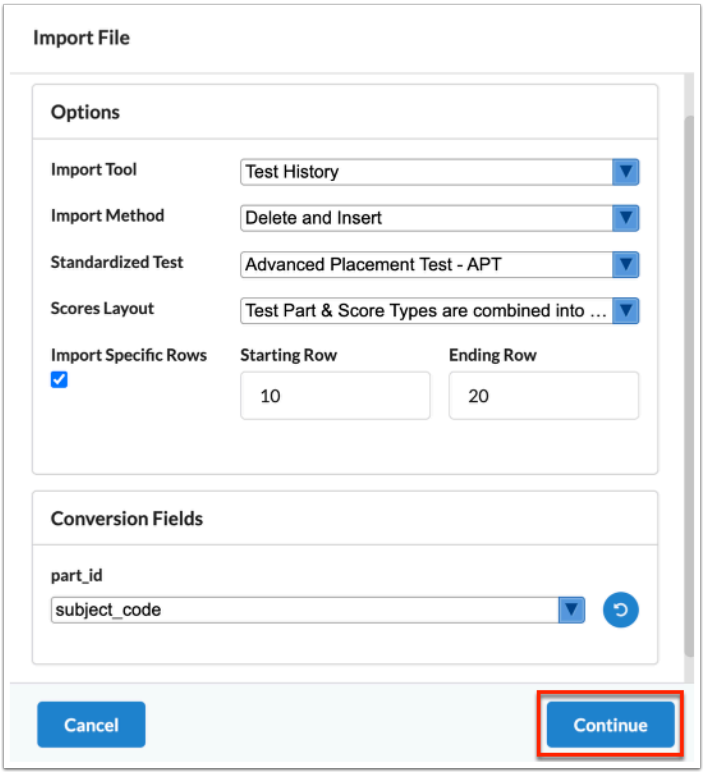
See Conversion Fields for information about the set up of conversion fields applicable to all tools, including Test History.

The Import Keys section displays if the **Allow Import Key Override** setting has been enabled for the selected import tool via Imports > Settings > Import Tool Settings > Student Information Tools.

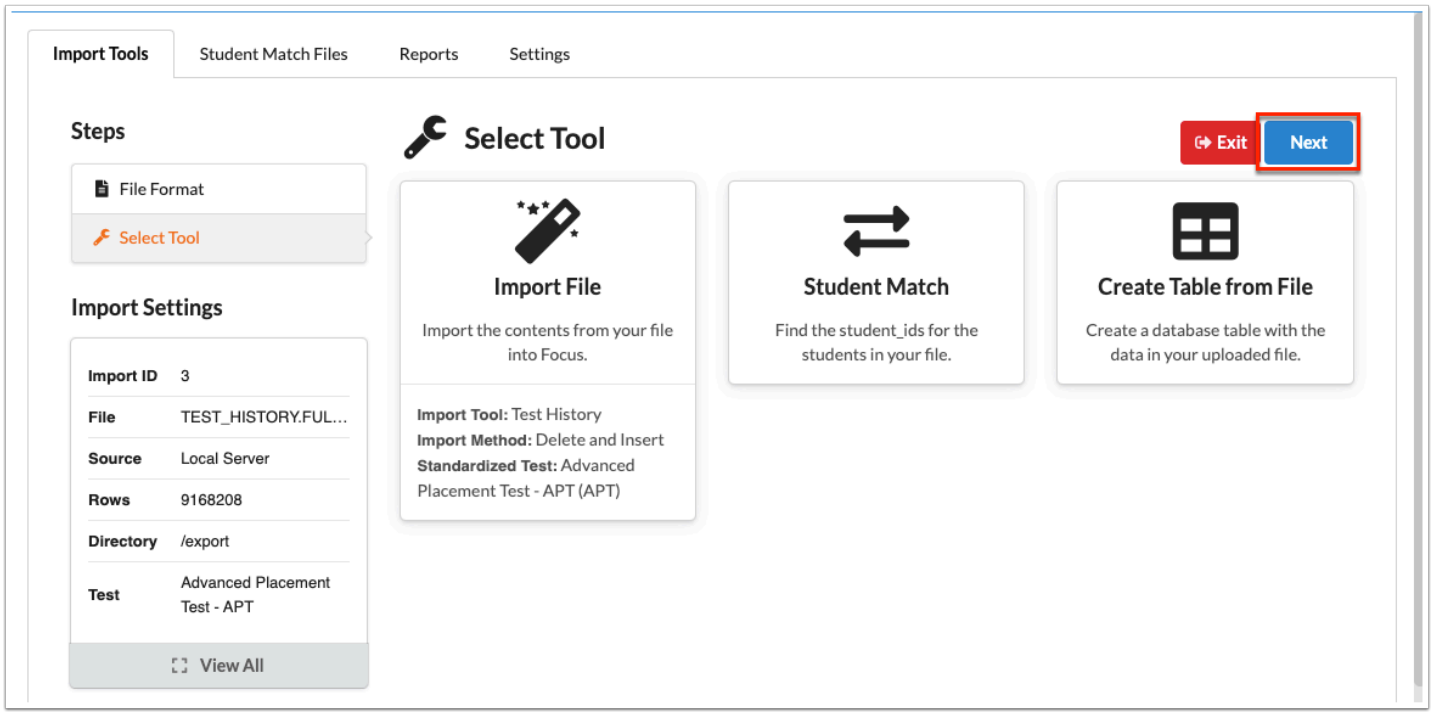
The Conversion Fields section displays for conversion fields that have more than one conversion option determined via Imports > Settings > Conversion Fields.



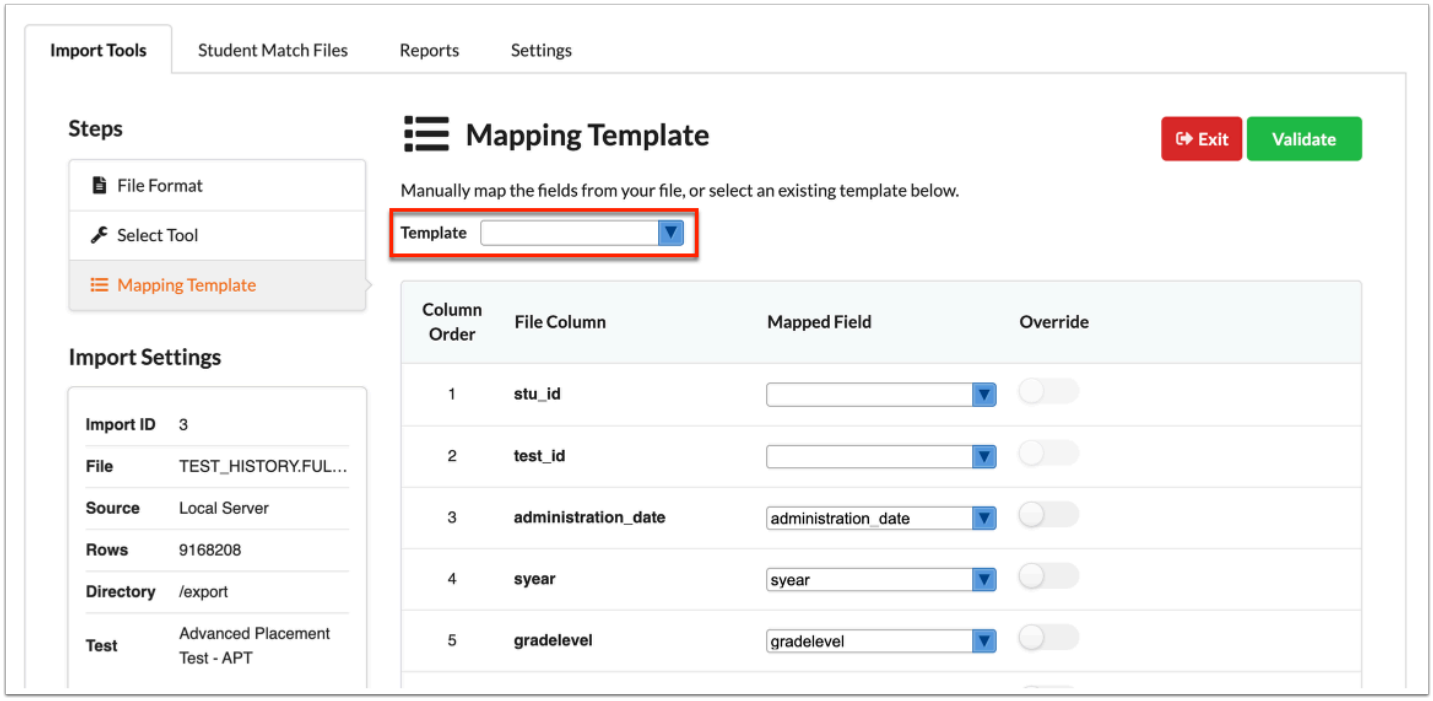
7. Click **Continue**.



8. Click **Next**.



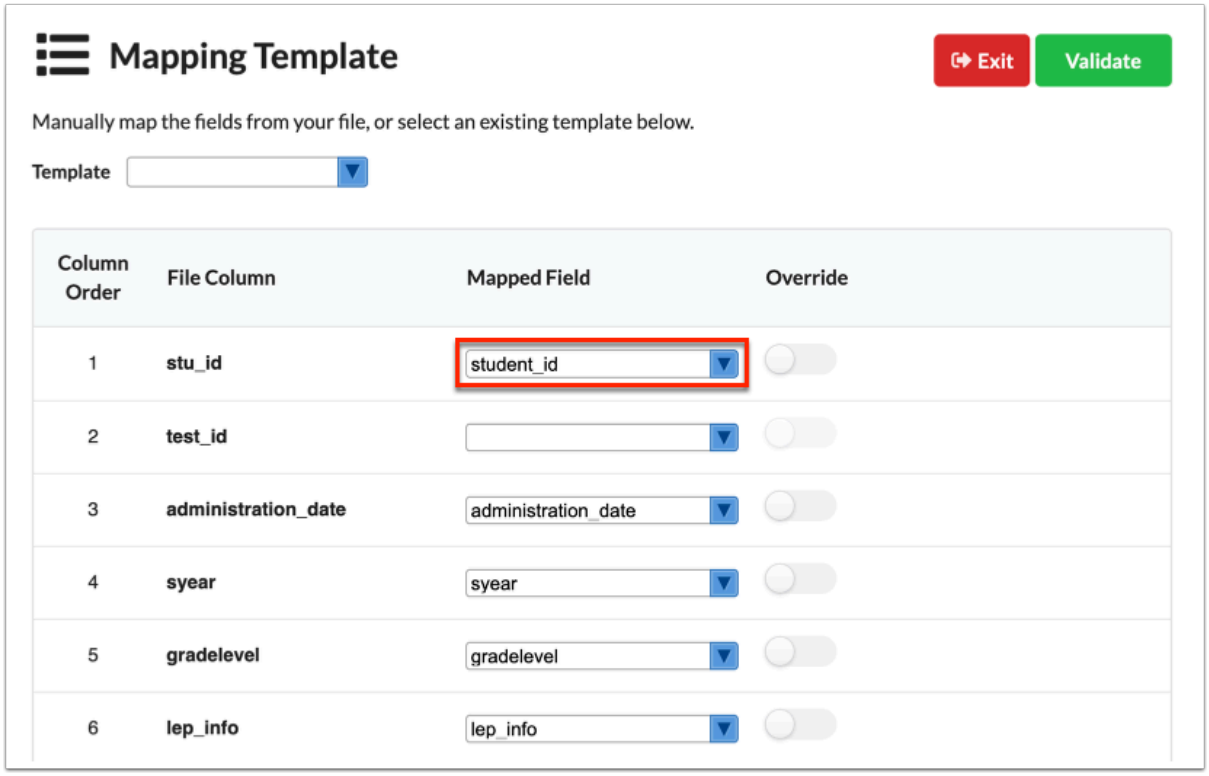
9. To use an existing template to map the fields, select the applicable **Template** from the pull-down.



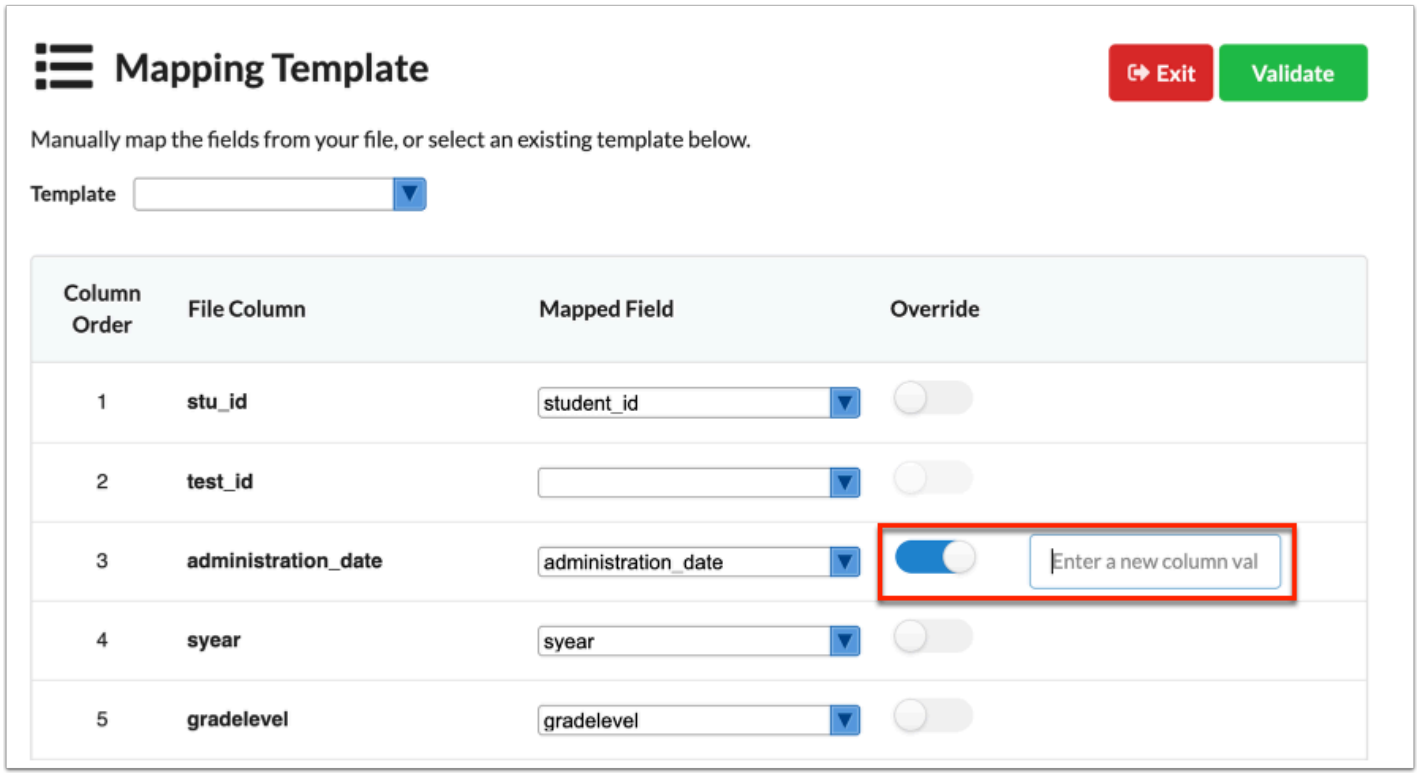
The Template pull-down populates from Settings > Templates.

10. Map the fields in the file to the corresponding columns in the destination table. Fields are automatically mapped when the column header matches the field title. To map the rest of the

file fields, select the **Mapped Field** from the pull-down next to each field. If you do not want to import a field, leave the pull-down blank.

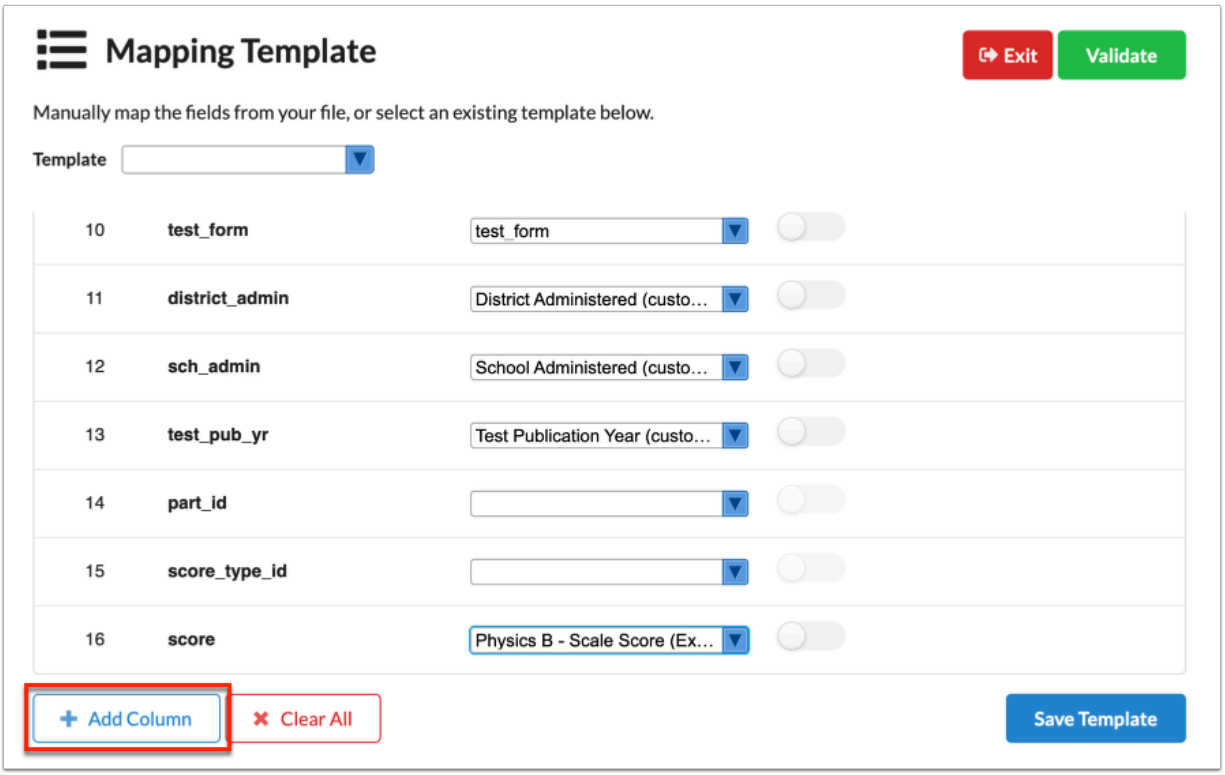


11. If you need to map a different field from the once automatically matched, click the **Override** toggle, then enter a new column value in the provided text box.

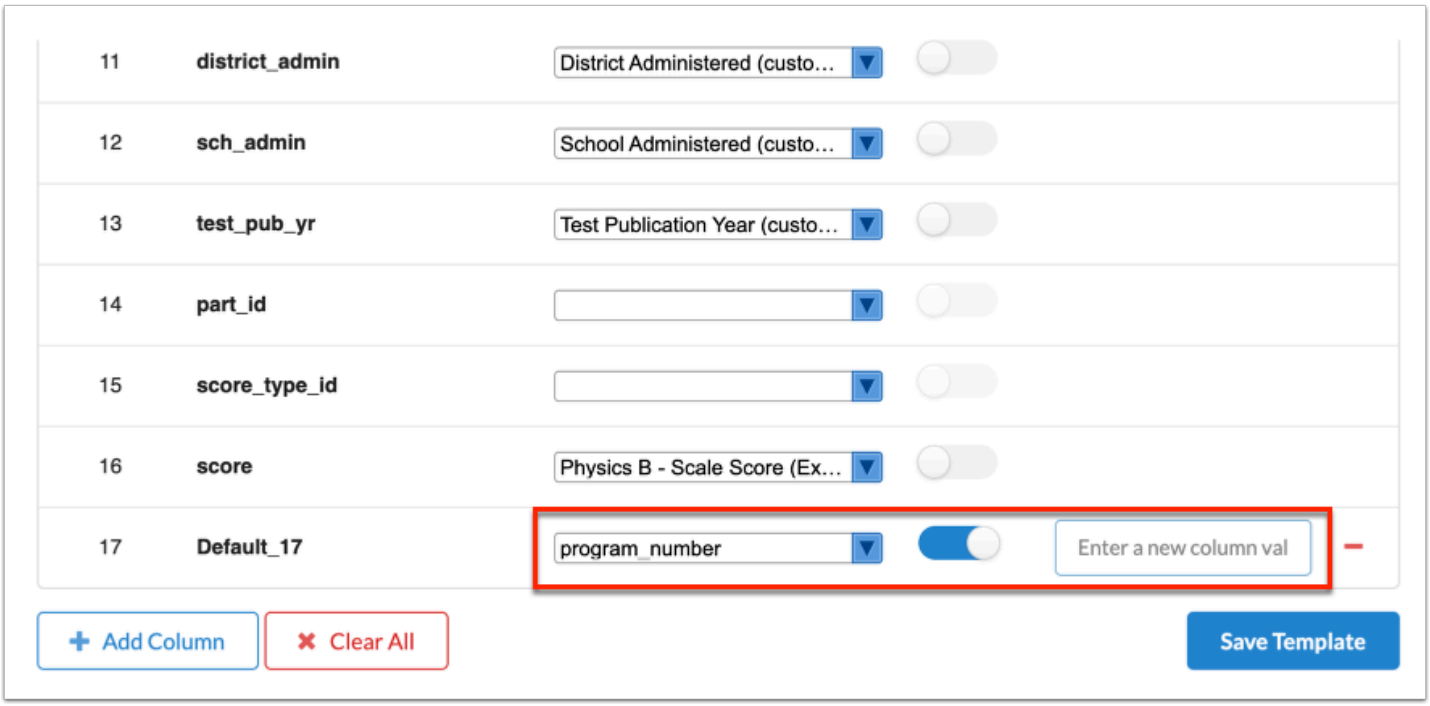


⚠ This override value replaces any value provided in the original import file for the selected column and for all records.

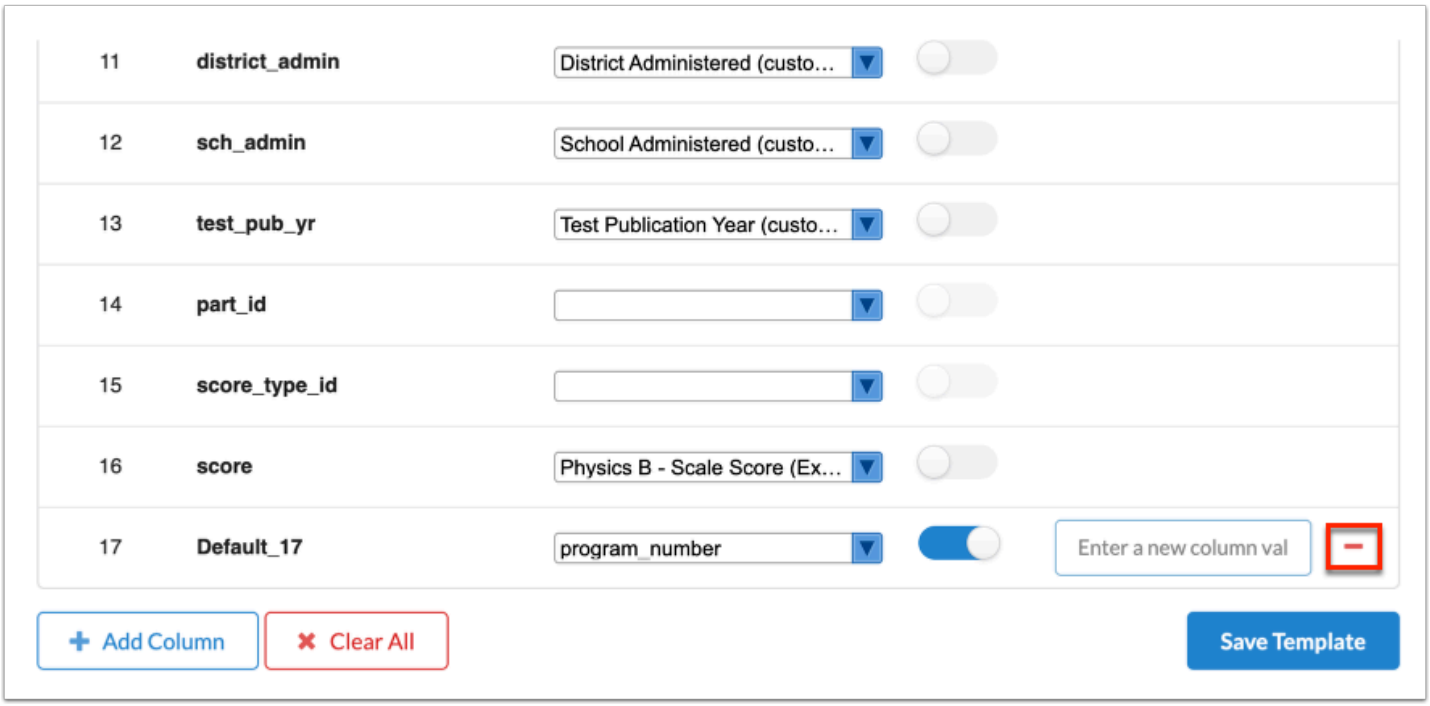
12. To default a value into a table column for a field that does not exist in the file, click **+ Add Column**.



a. In the added row, select the destination table column from the **Mapped Field** pull-down. The **Override** toggle is automatically enabled. Enter the value that will default into the table column in the provided text box.

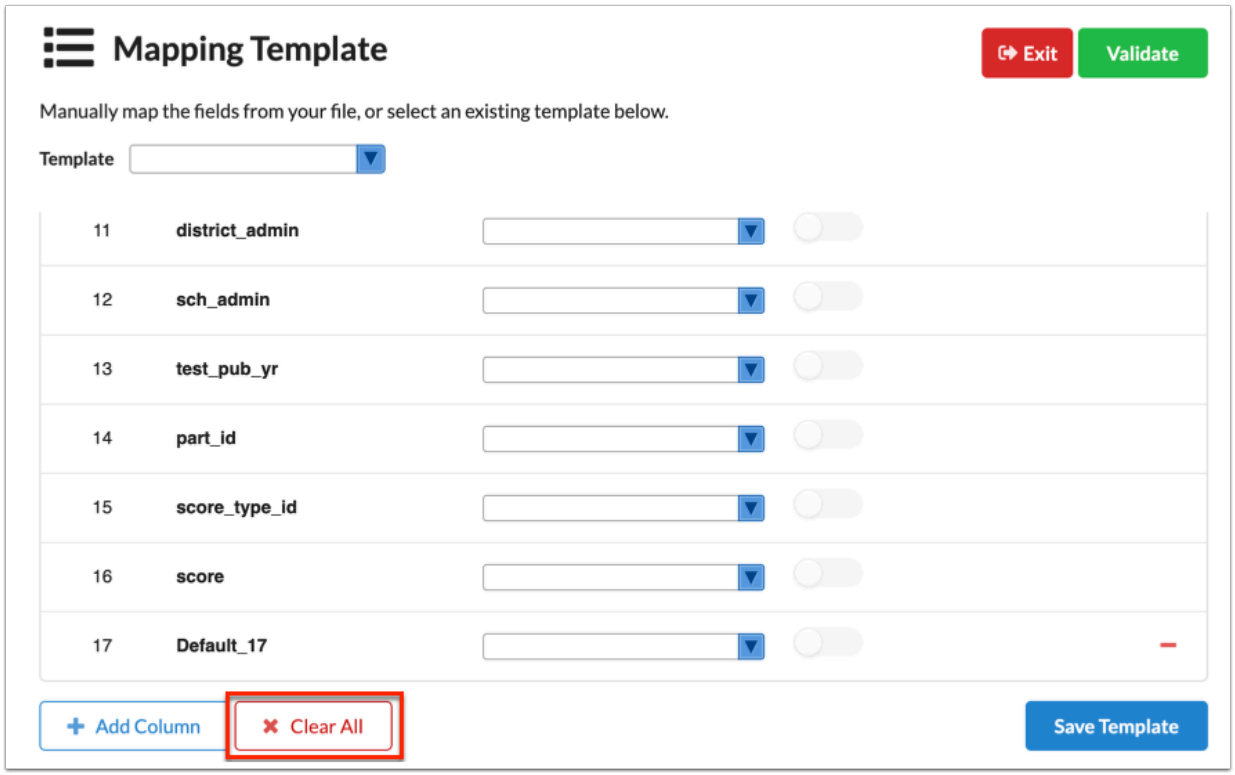


b. Add any additional defaulted fields as needed. There is no limit to the number of defaulted fields that can be added. To delete a defaulted field, click the **delete** button (red minus sign).

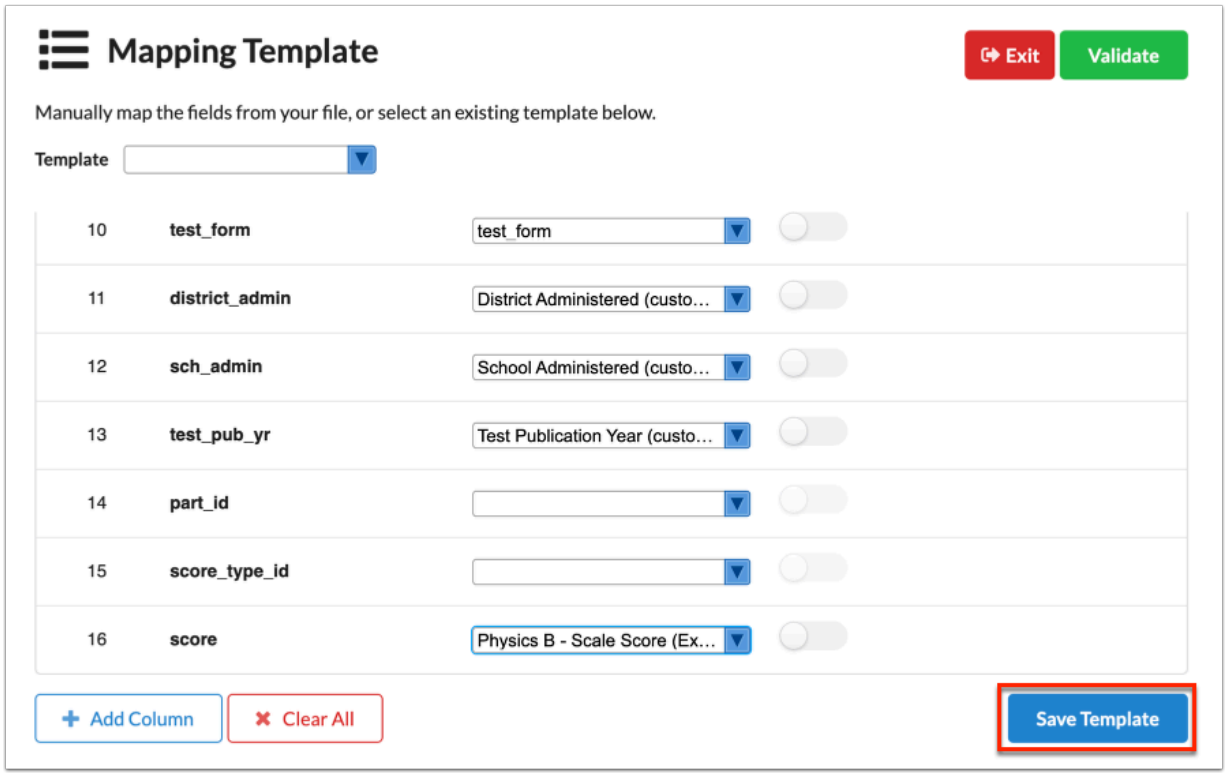


Only defaulted fields can be deleted in the mapping process.

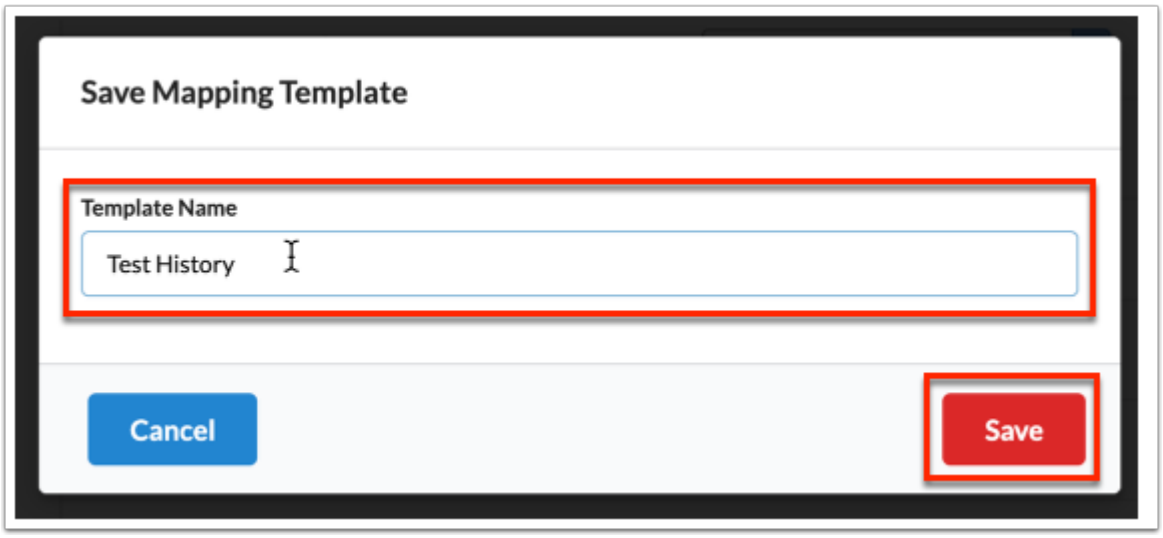
Click **Clear All** to clear all Mapped Field pull-downs and start over.



13. To save the map as a template for future use, click **Save Template**.

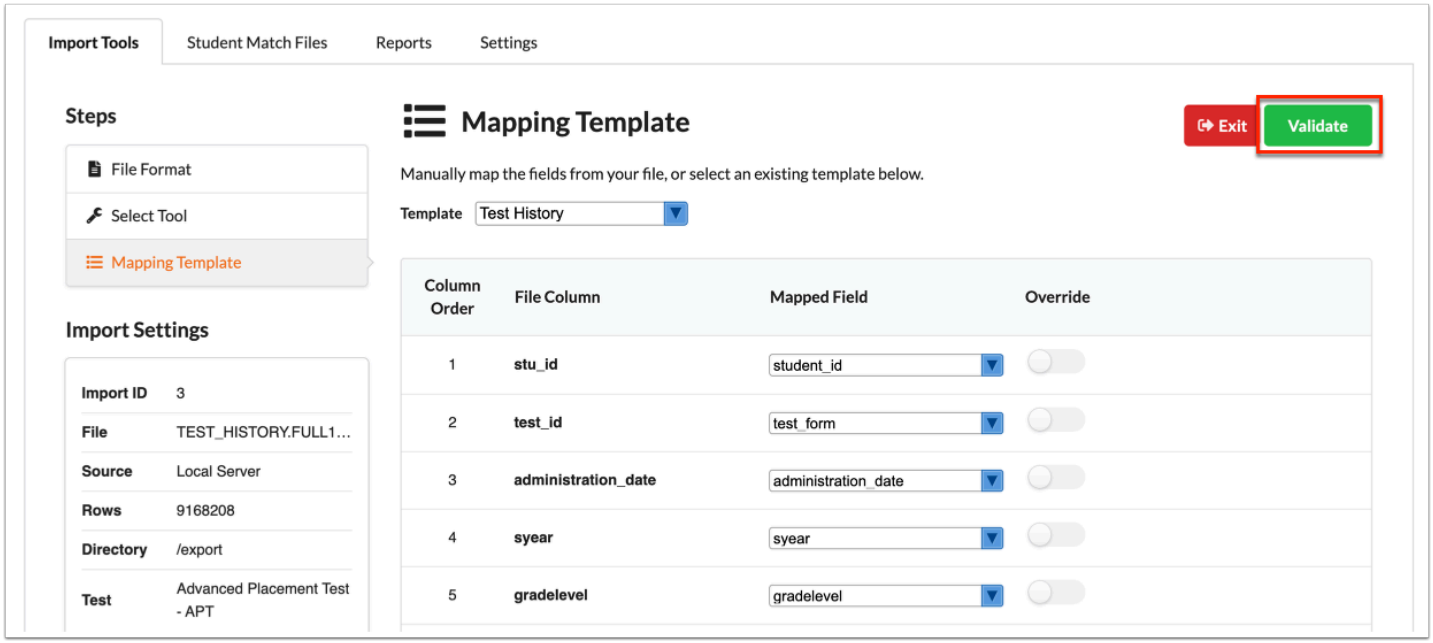


a. In the pop-up window, enter a **Template Name** and click **Save**.

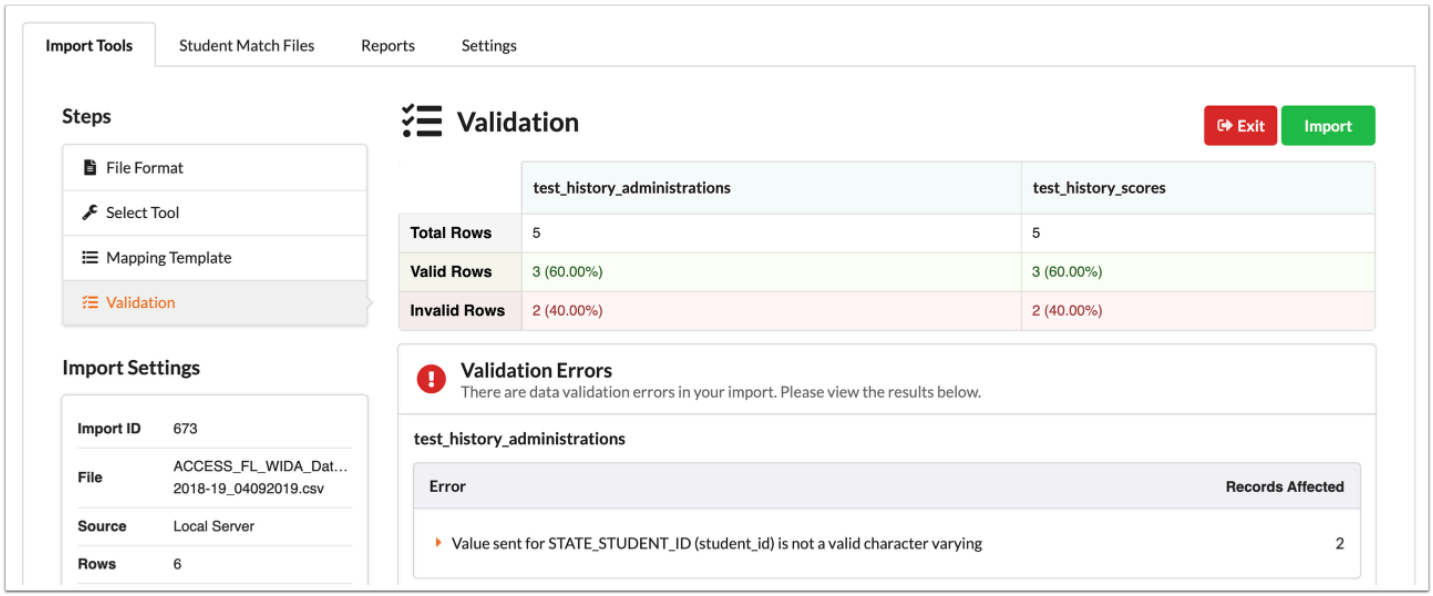


A confirmation message displays when the entered title matches the name of an existing template title (case-sensitive).

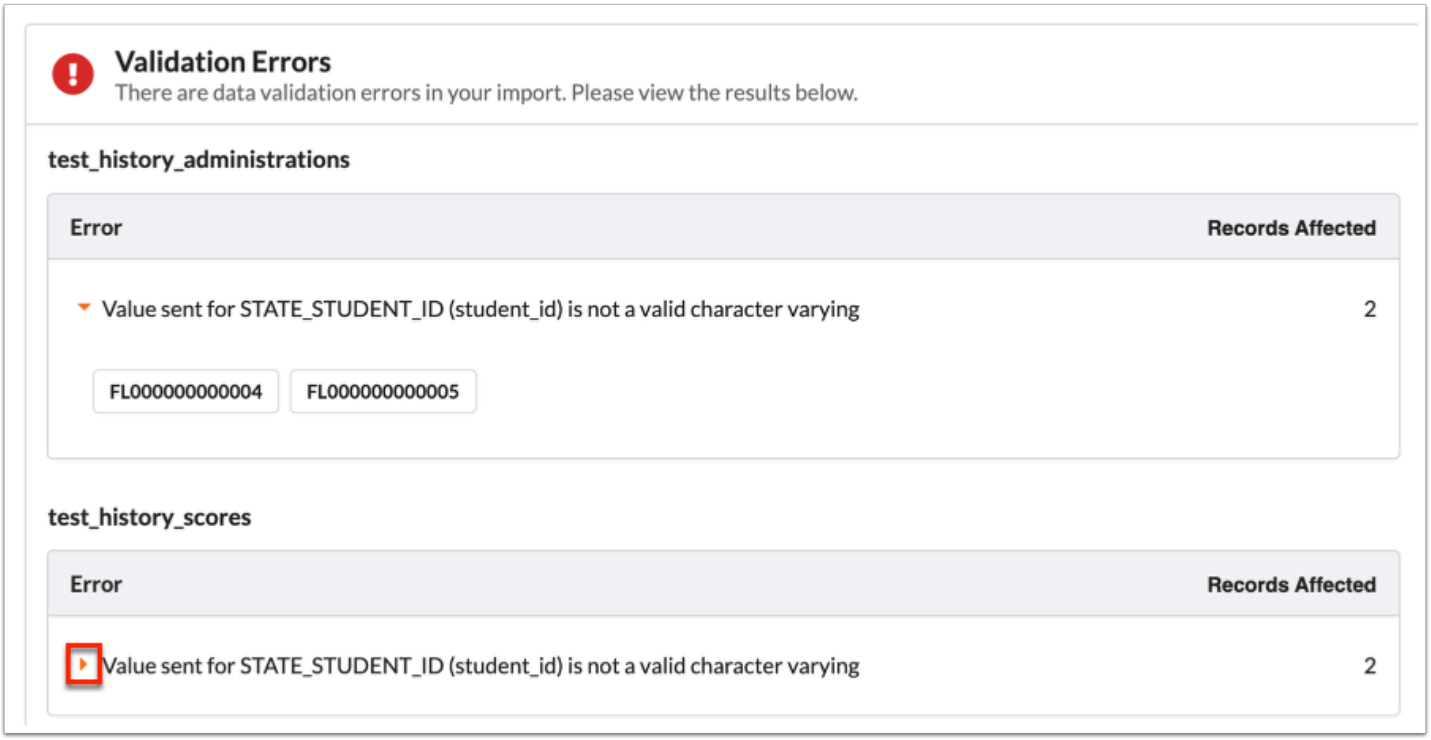
14. Click **Validate**.



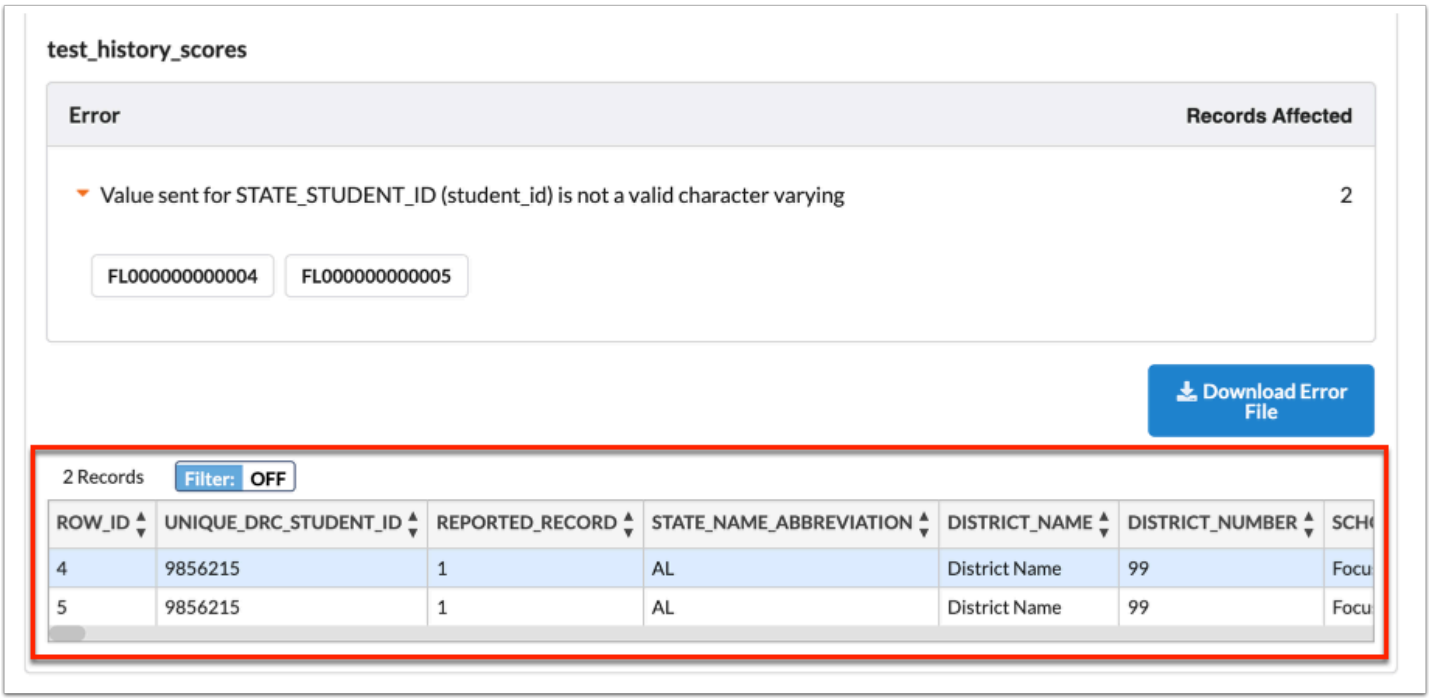
15. Review total **Valid Rows** and **Invalid Rows** including **Validation Errors** you must address before complete the import process.



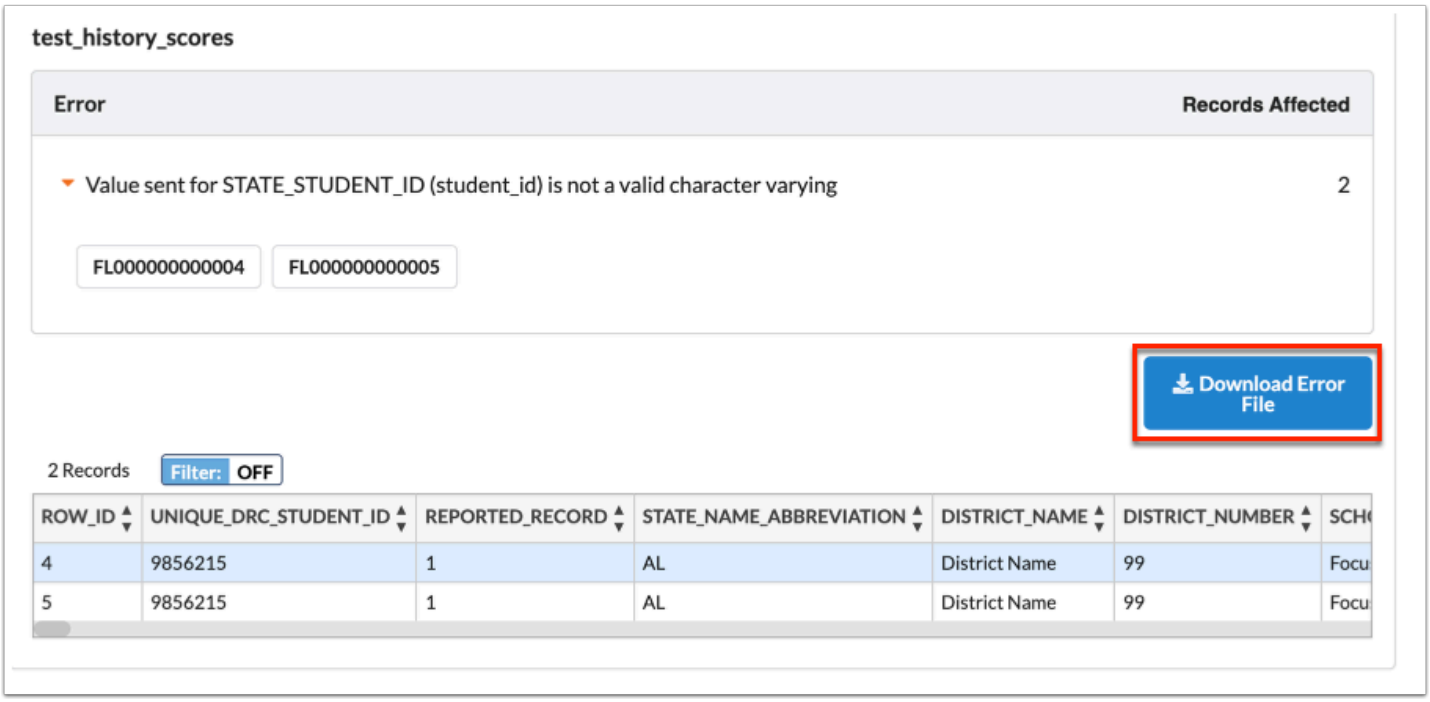
a. To review additional information about the validation errors, click the orange arrow.



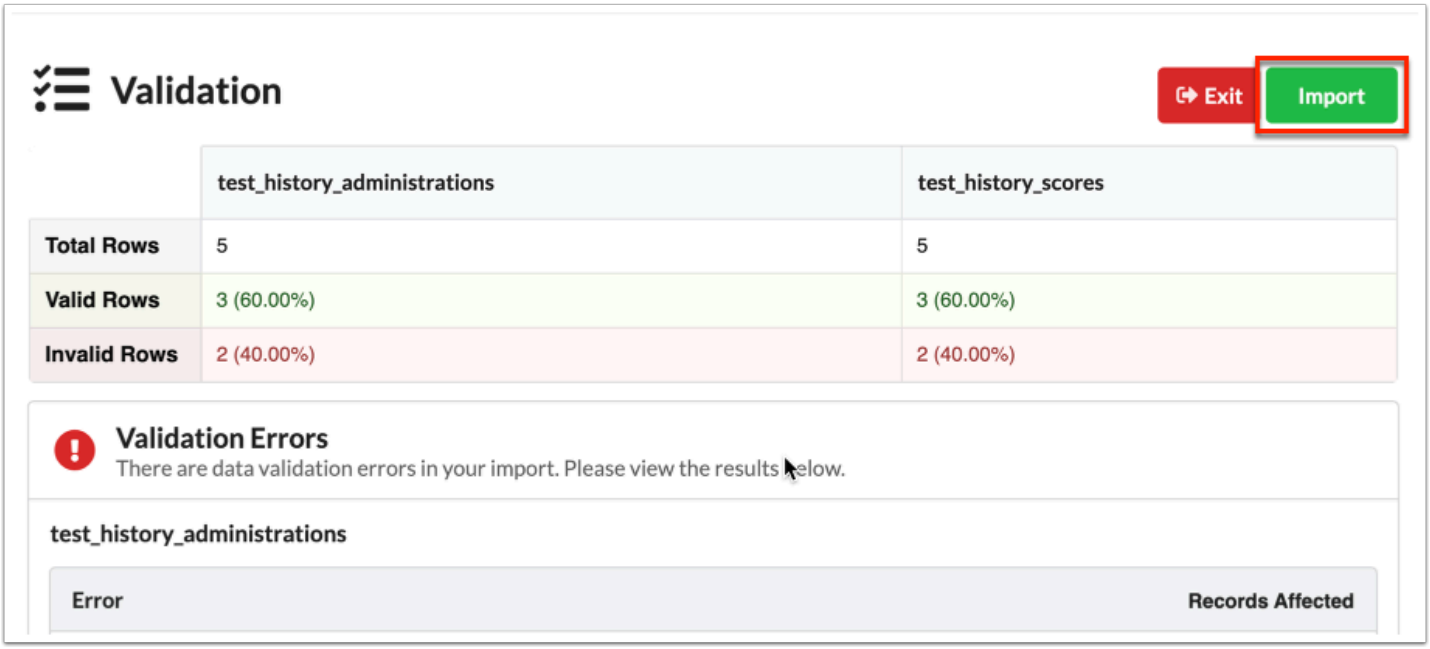
The Invalid Rows data is displayed at the bottom of the Validation screen where you can carefully review all the information from the file.



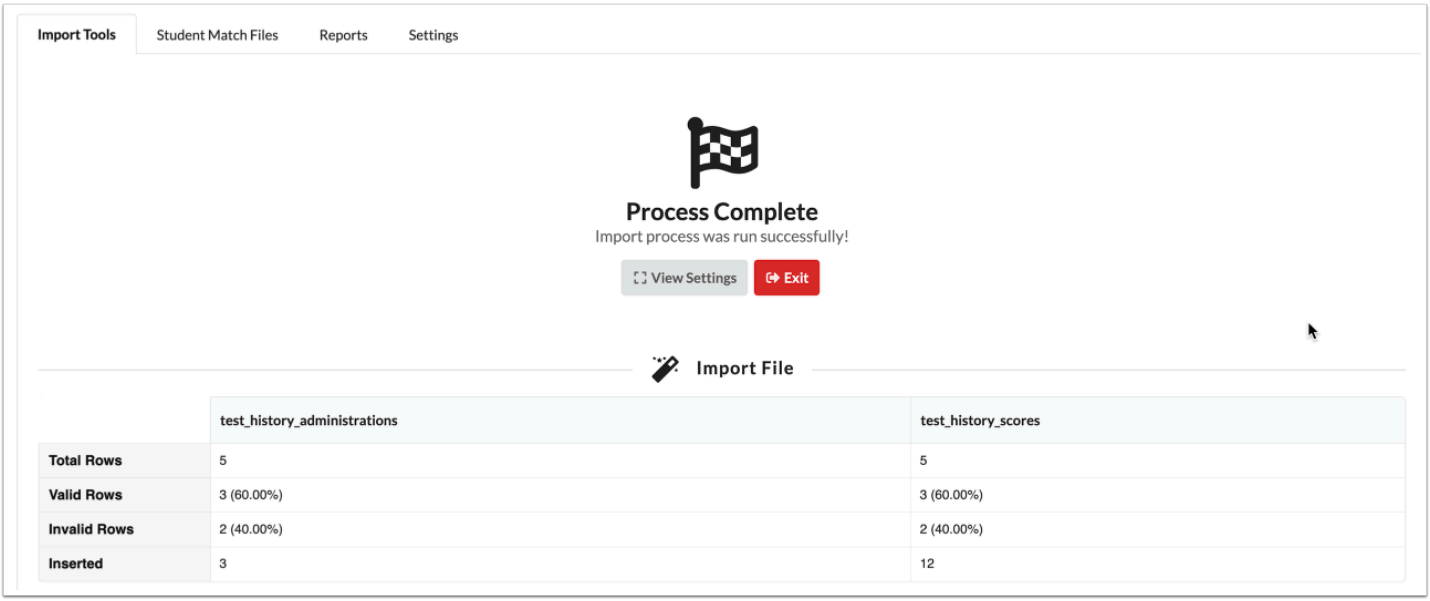
Click **Download Error File** to download a file of all listed errors and data to your computer.



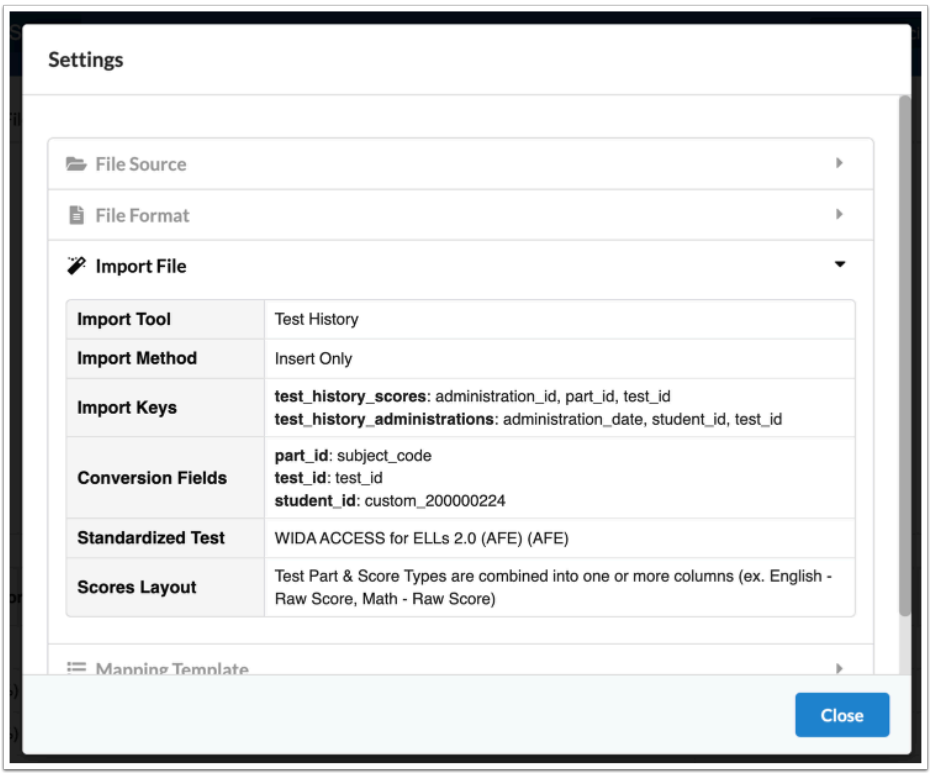
16. Once validation is complete, click **Import**.



Review the process status, such as Process Complete, and the Total of Rows added, number of Valid Rows, Number of Invalid Rows, number of records Inserted, etc. Note: The information displayed here may differ depending on the steps followed above.



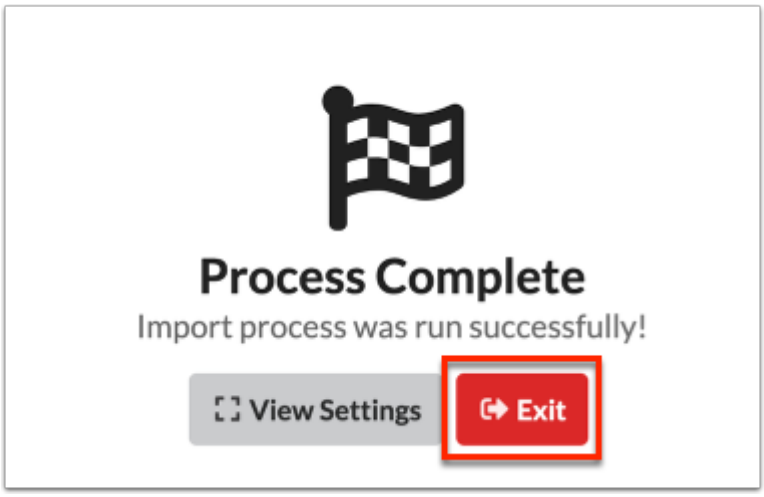
17. Click **View Settings** to review the details of the imported data.



a. Click the arrows to open and close headers containing information.

b. Click **Close** once your review is complete to close the Settings pop-up window.

18. Click **Exit** to return to the main Imports screen.

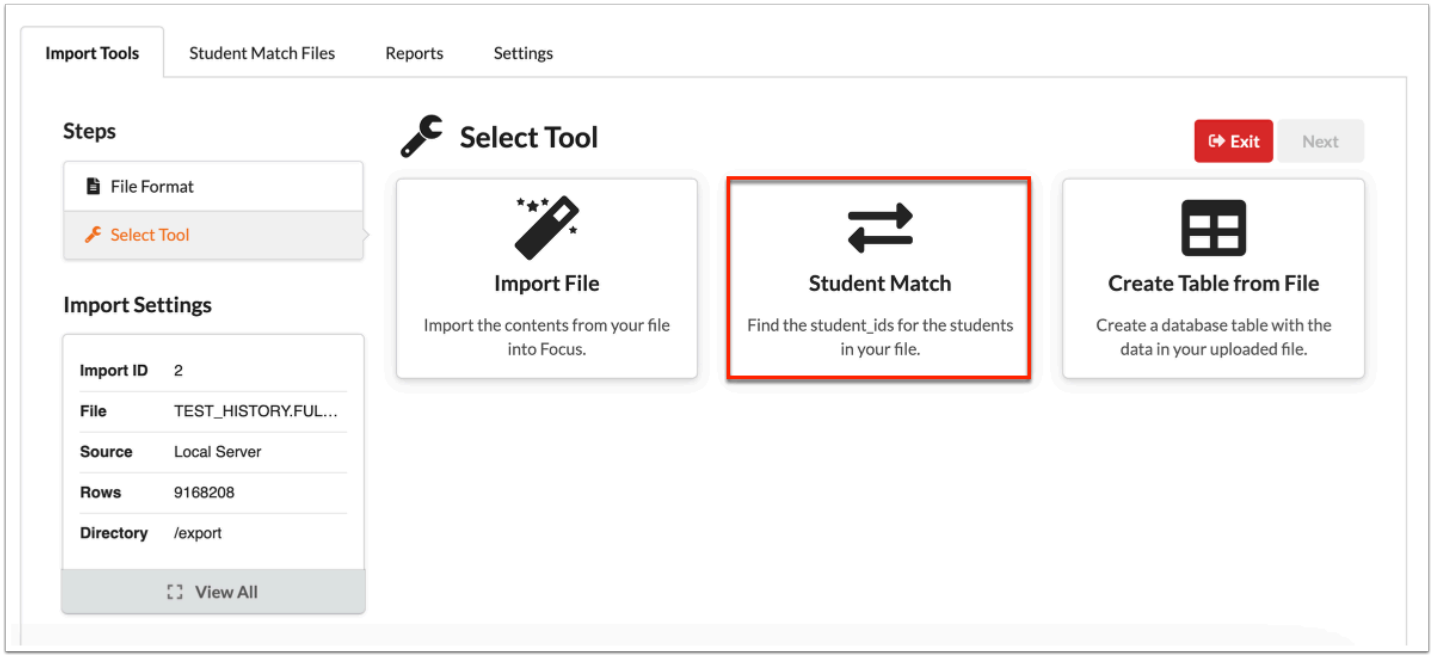


Import Tools: Student Match

The Student Match import tool is used to find student_ids for the students in the uploaded file.

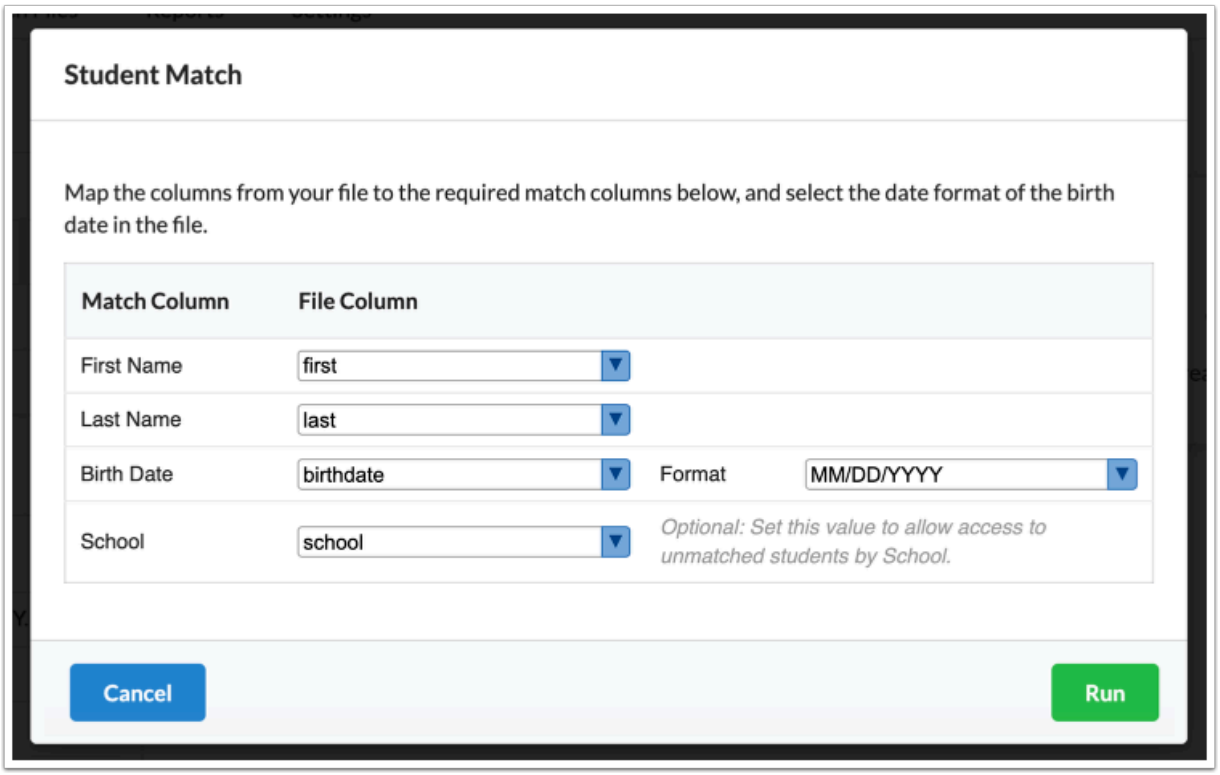
1. Follow the steps described in [Import Tools (Importing a File)].

2. Click **Student Match**.

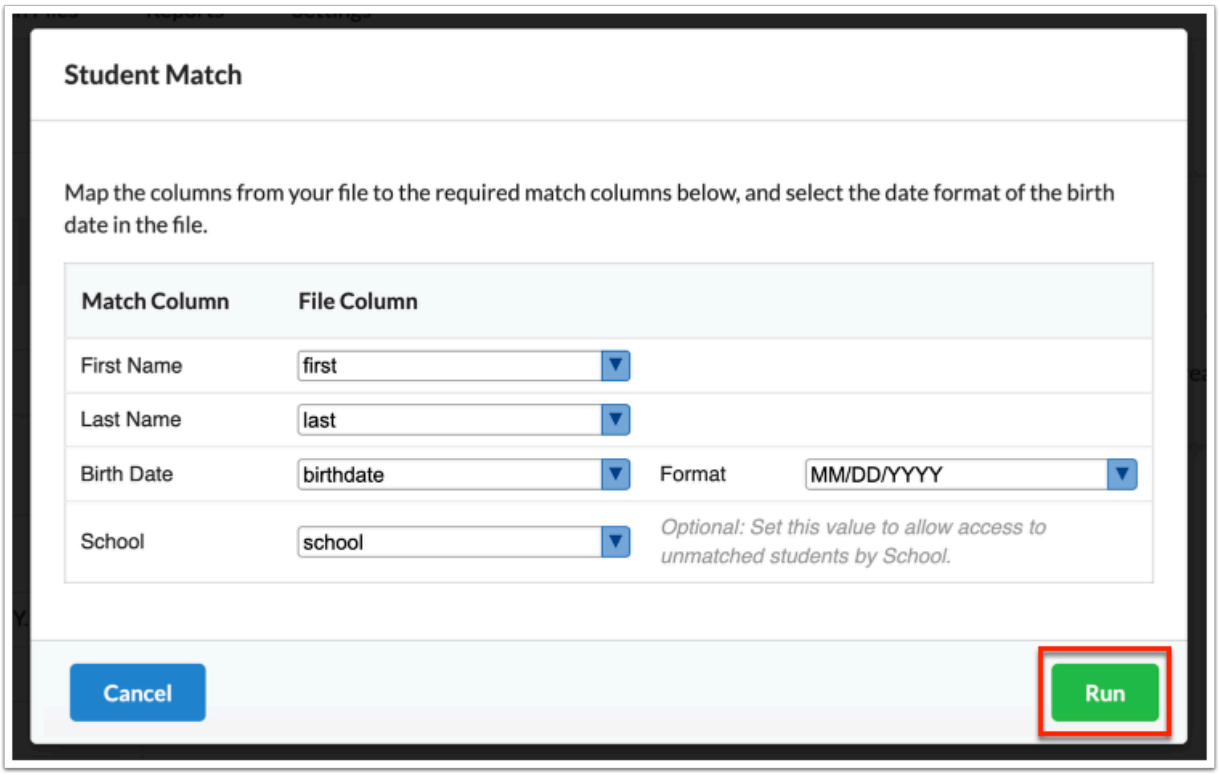


Reminder: Student Match can run alongside an Import, such as Test History.

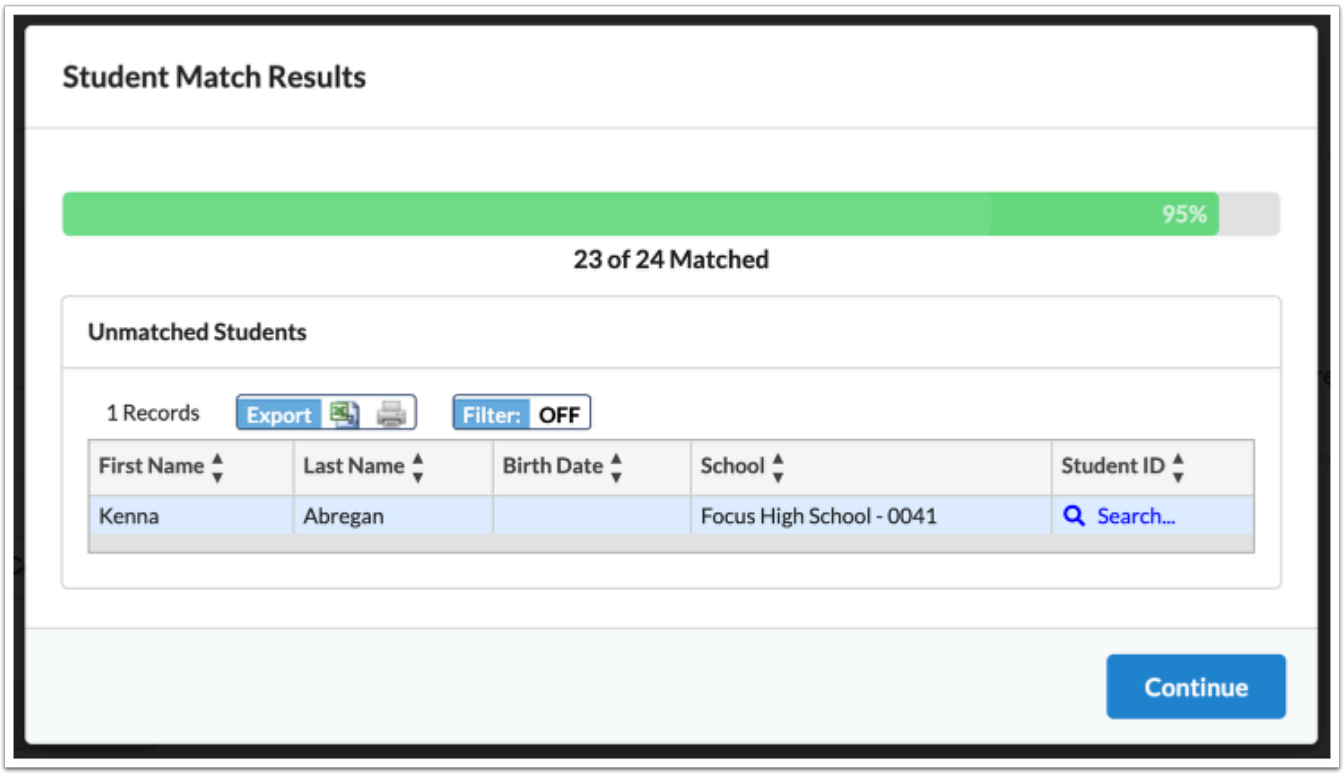
3. In the pop-up window, map the columns from your file to the required match columns. Select the applicable **File Column** from each pull-down for the Match Column.



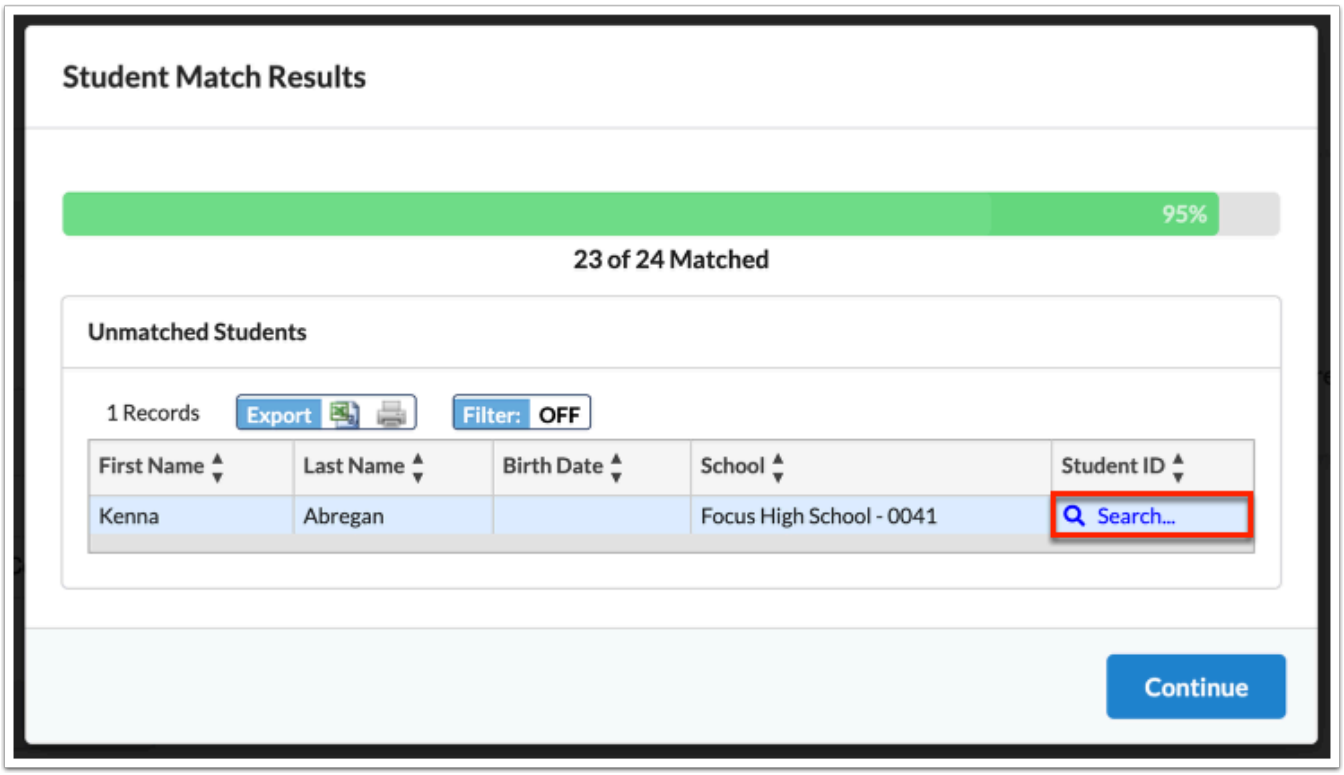
4. Click **Run**.



Review the students matched. The percentage bar shows how many students have been matched automatically. The Unmatched Students section displays all the students who were not automatically matched.



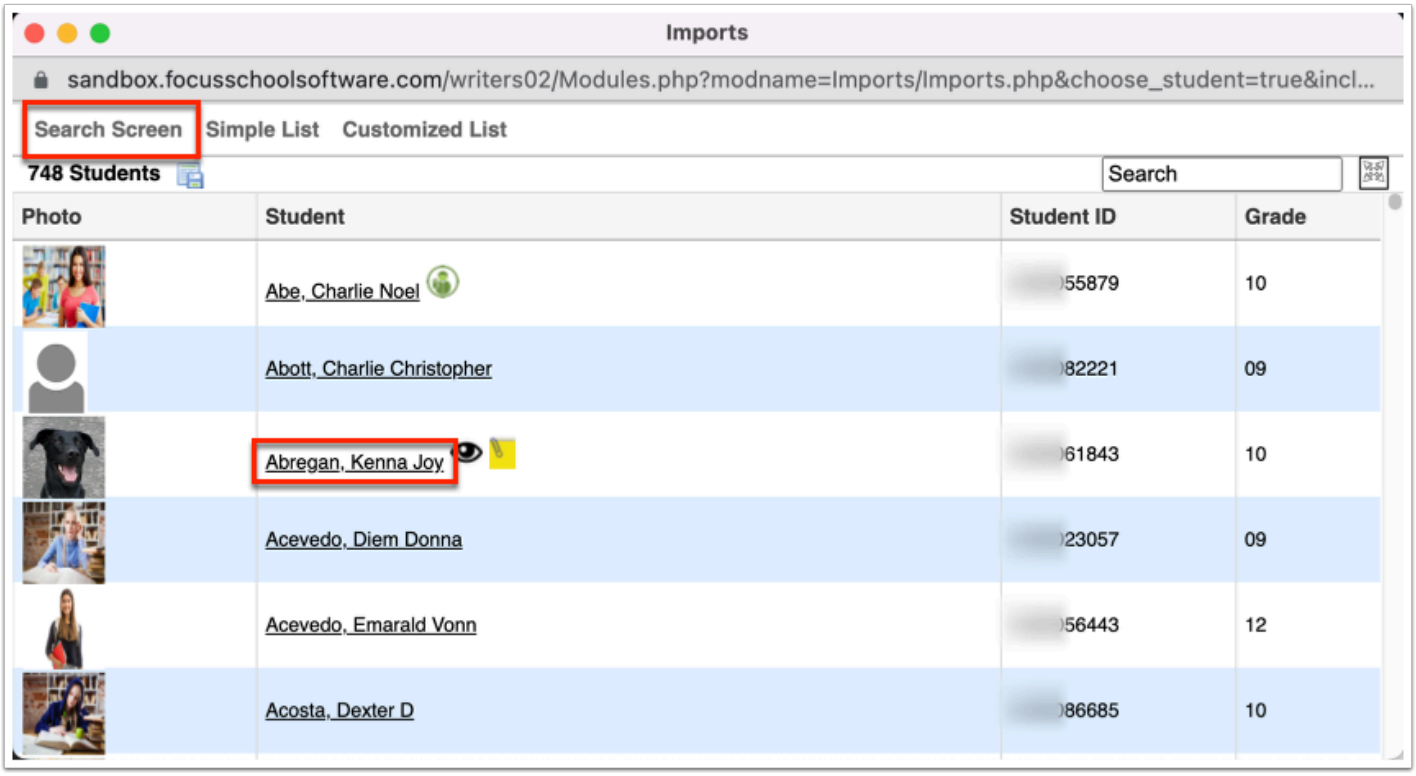
5. Click **Search** to conduct a student search and match a student manually.



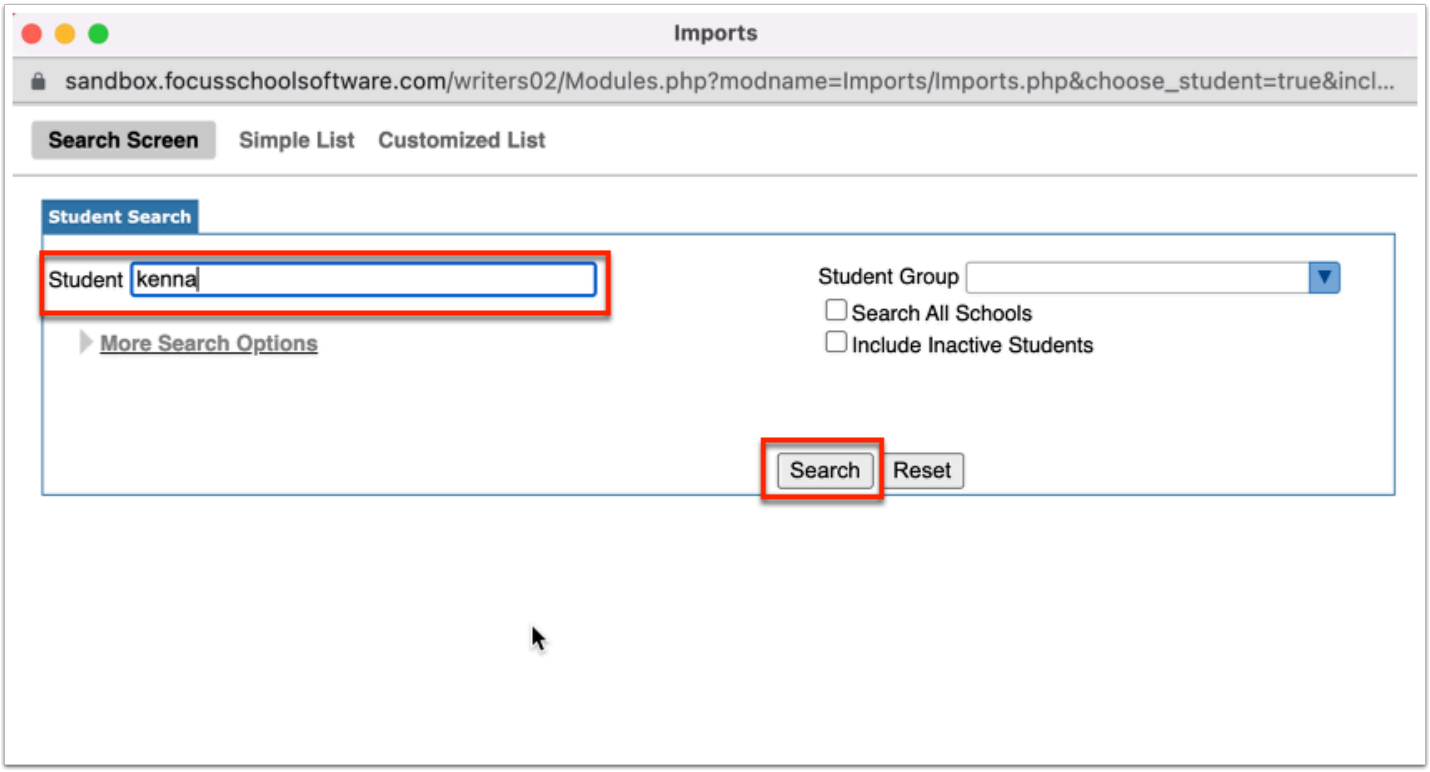
a. Scroll through the listed students until you find the correct student, then click the **Student** name to manually match them.

OR

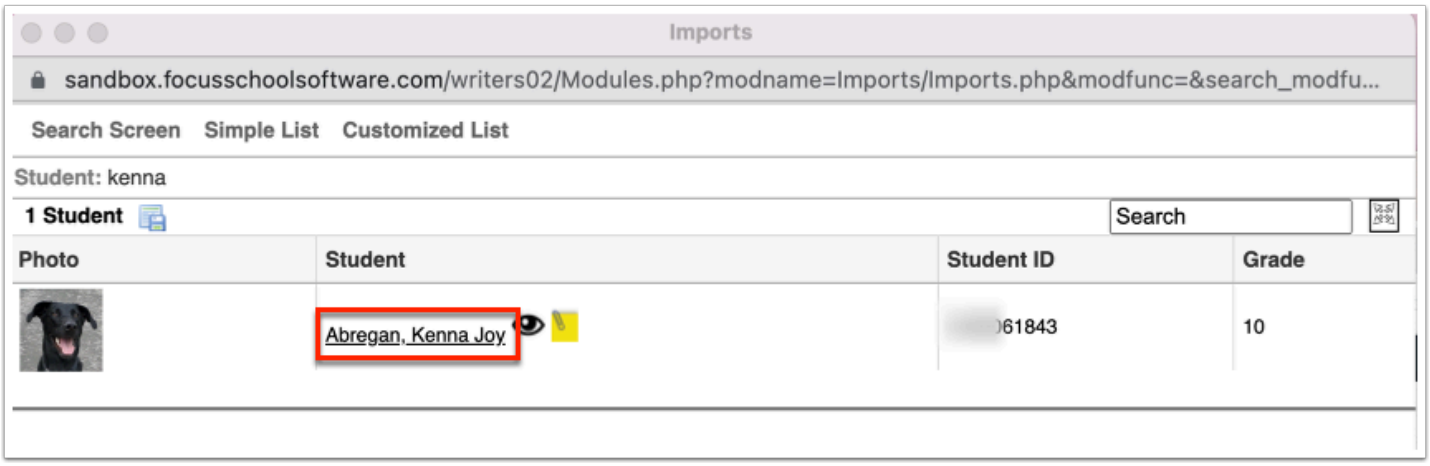
Click **Search Screen** to conduct a student search.



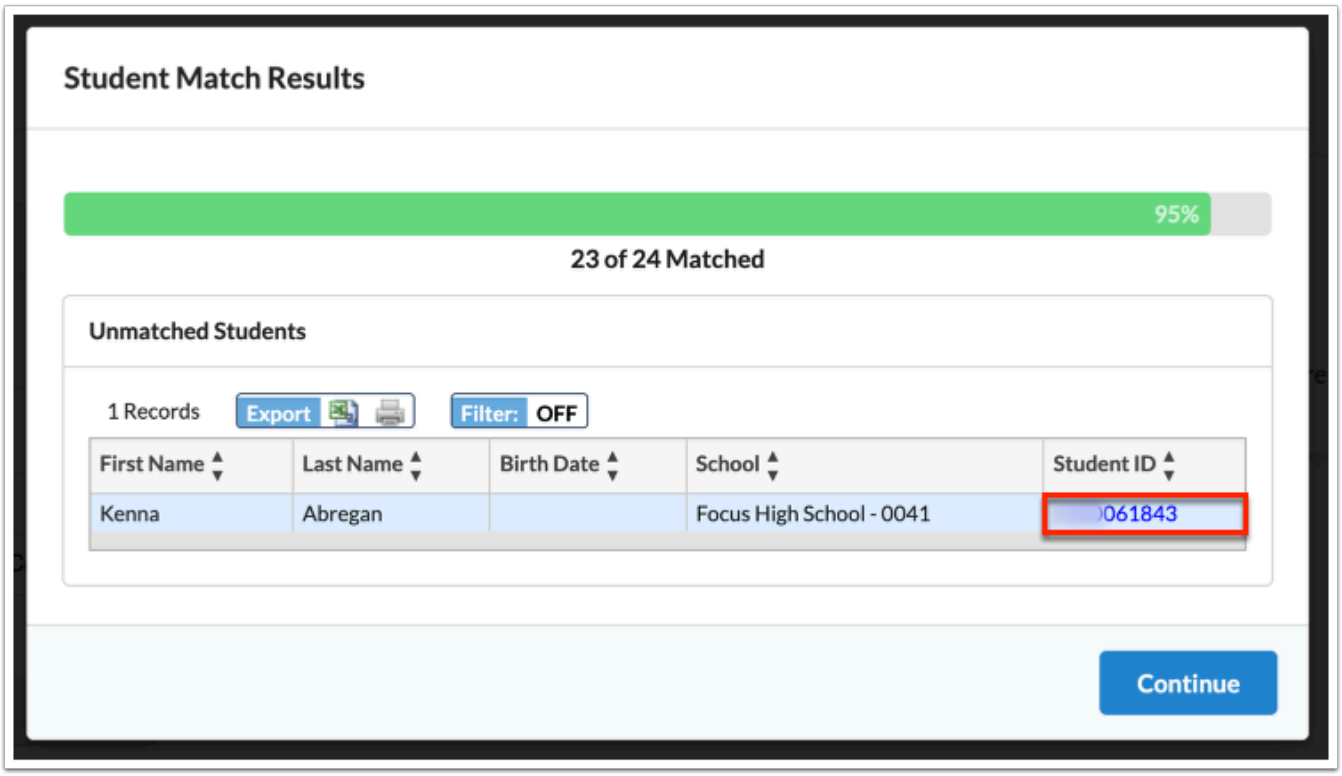
b. If conducting a student search from the Search Screen, enter student information in the **Student** text box and click **Search**. See Searching for Students for detailed information.



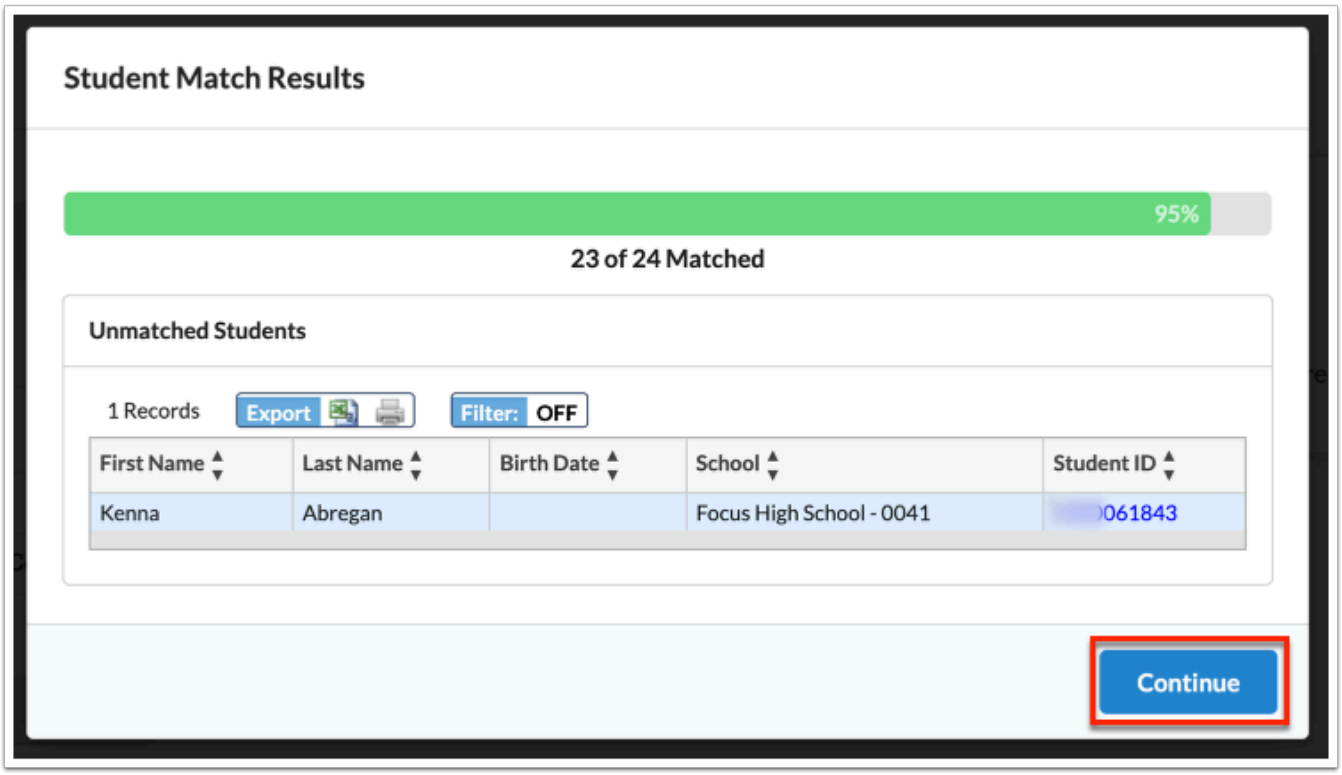
c. Click the **Student** name to manually match the student.



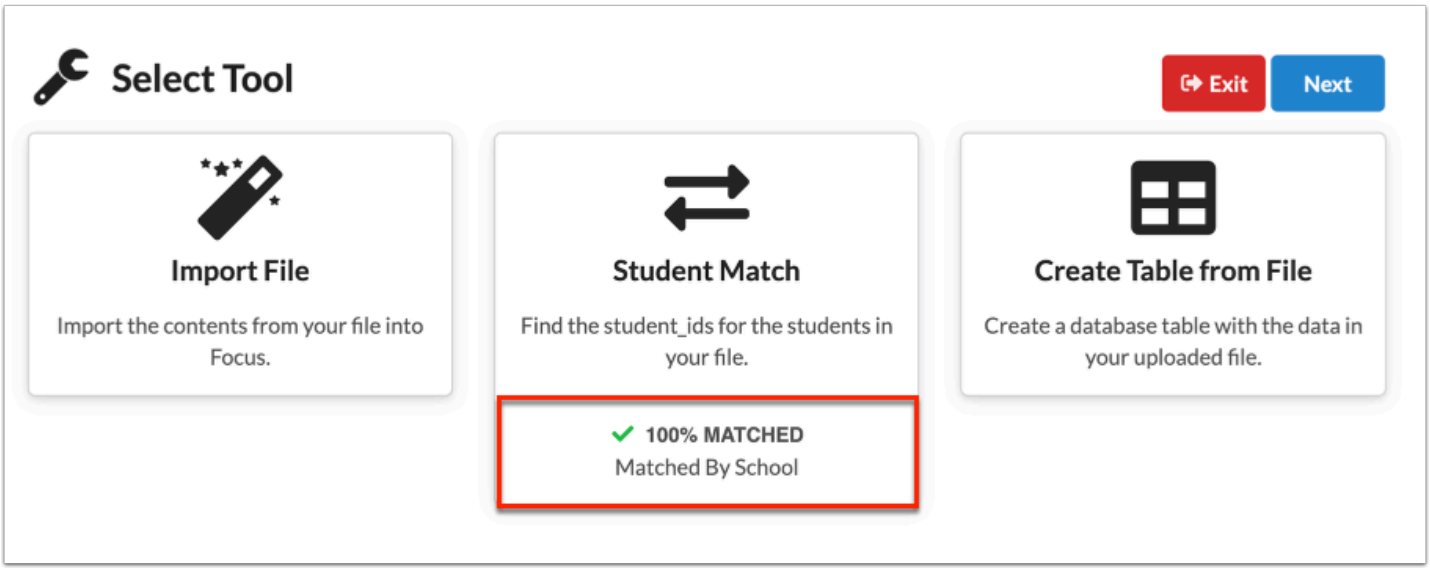
Once manually matched, the **Student ID** column is populated with the student's ID number in place of the Search link.



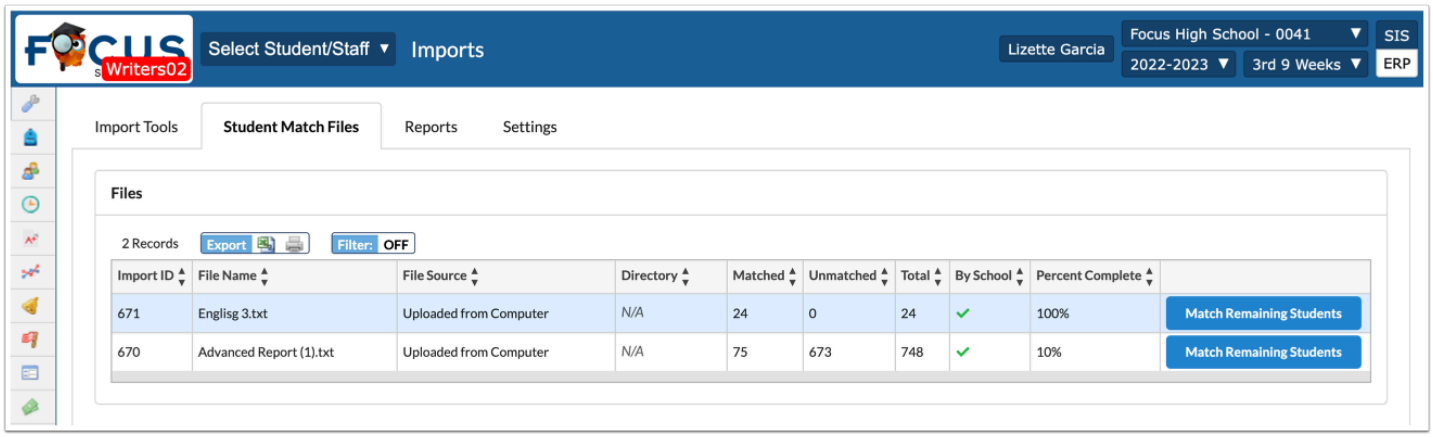
6. Click **Continue** to finish the process.



Once complete, you'll see the percentage of students match in the Student Match tool section.

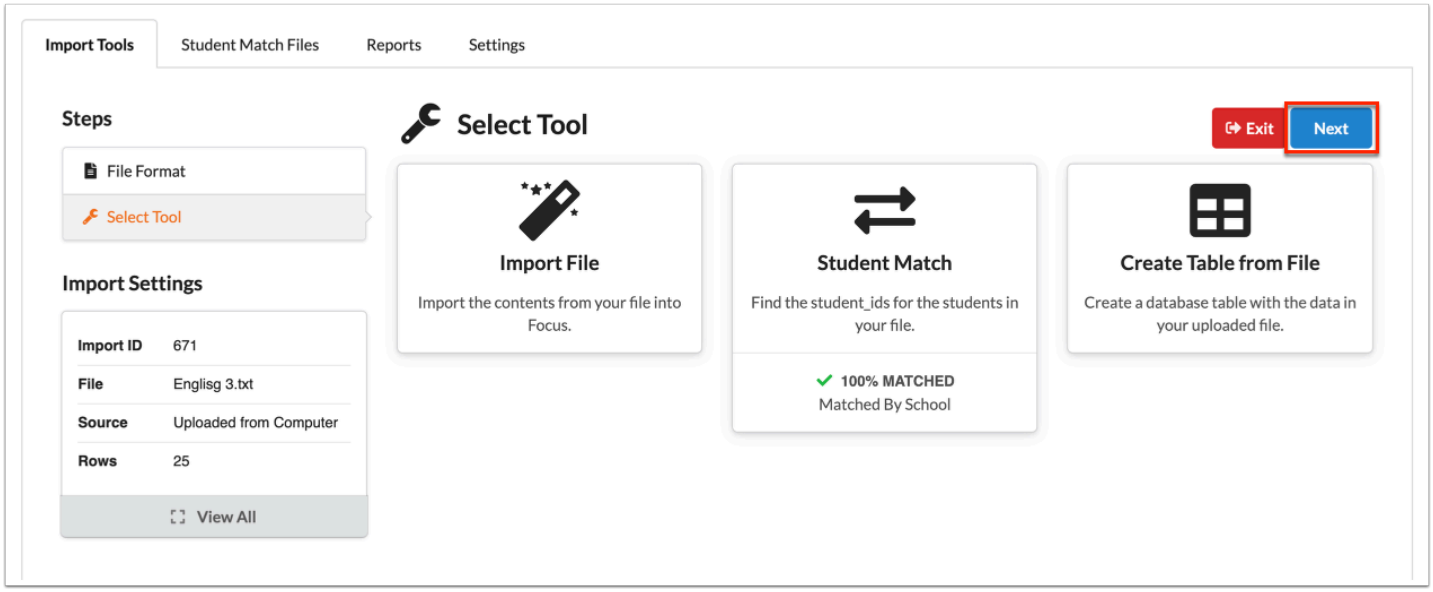


Any Student Matches conducted here display on the Student Match Files tab, where you can review student matching processes and continue matching students, as needed.

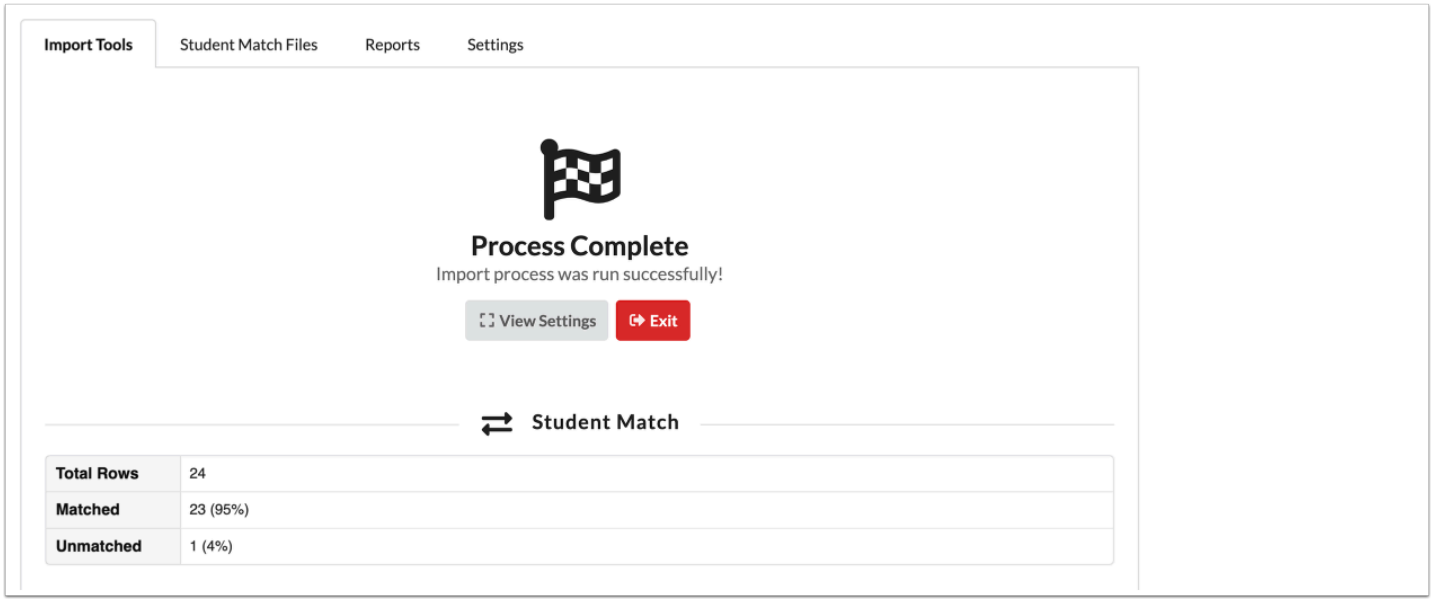


> ⚠ Re-running the Student Match during the import will clear all the previously matched data. Any incomplete matches for any given file that are not completed during the import process should always be completed from the Student Match Files tab instead to retain all progress made. When completed in the tab, you can then go back and finish the import.

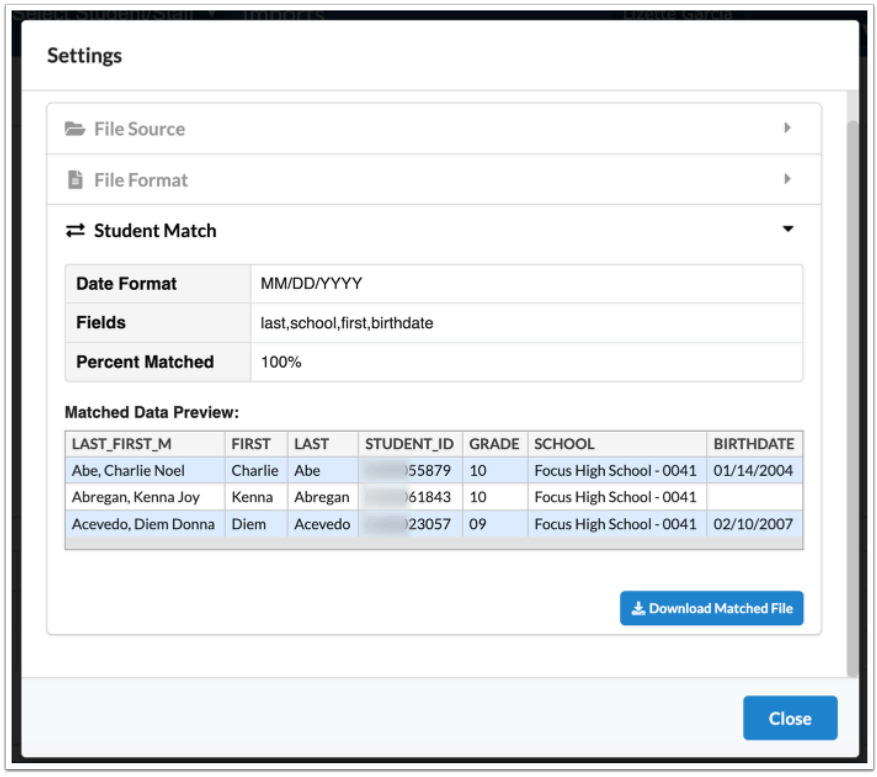
7. Click **Next**.



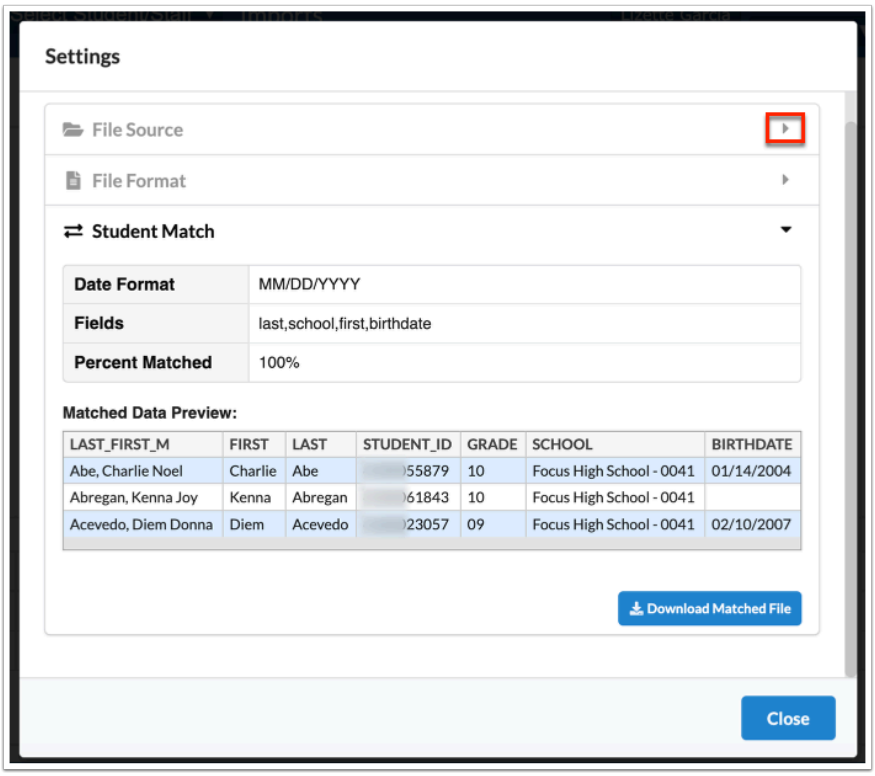
Review the process status, such as Process Complete, and the Total of Rows added, number and percentage of student Matched and Unmatched.



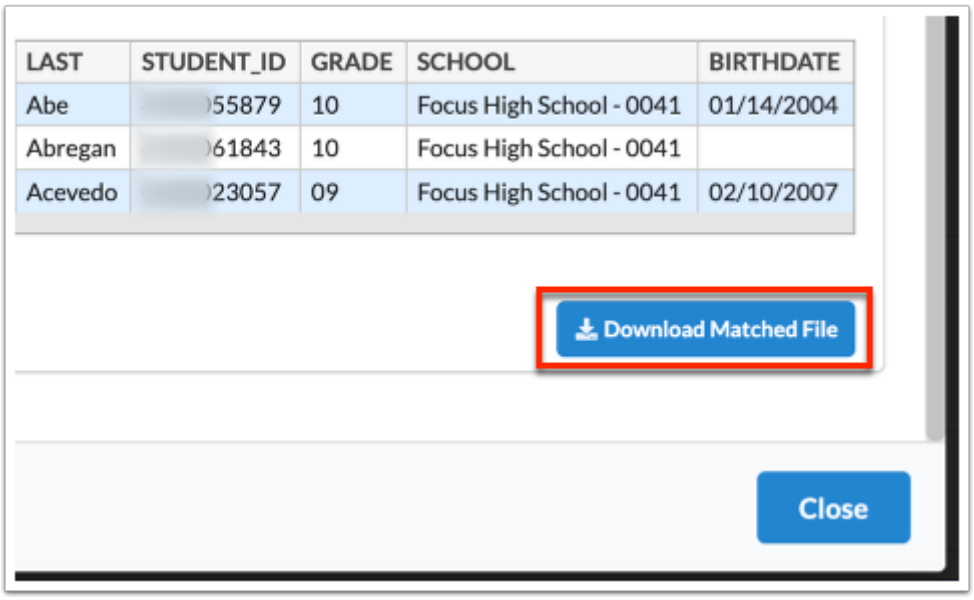
8. Click **View Settings** to review the details of the imported data.



a. Click the arrows to open and close headers containing information.

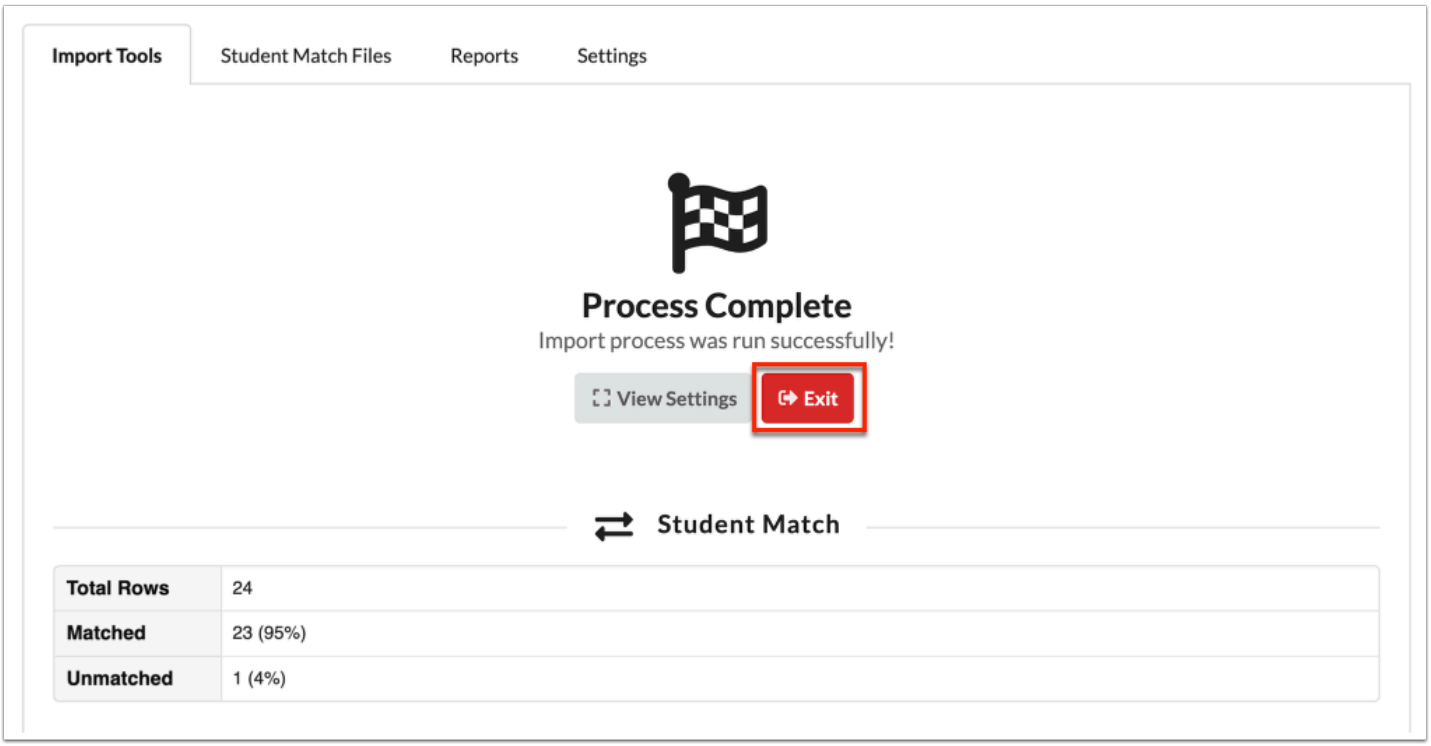


b. Click **Download Matched File** to download a copy of the matched records.



c. Click **Close** once your review is complete to close the Settings pop-up window.

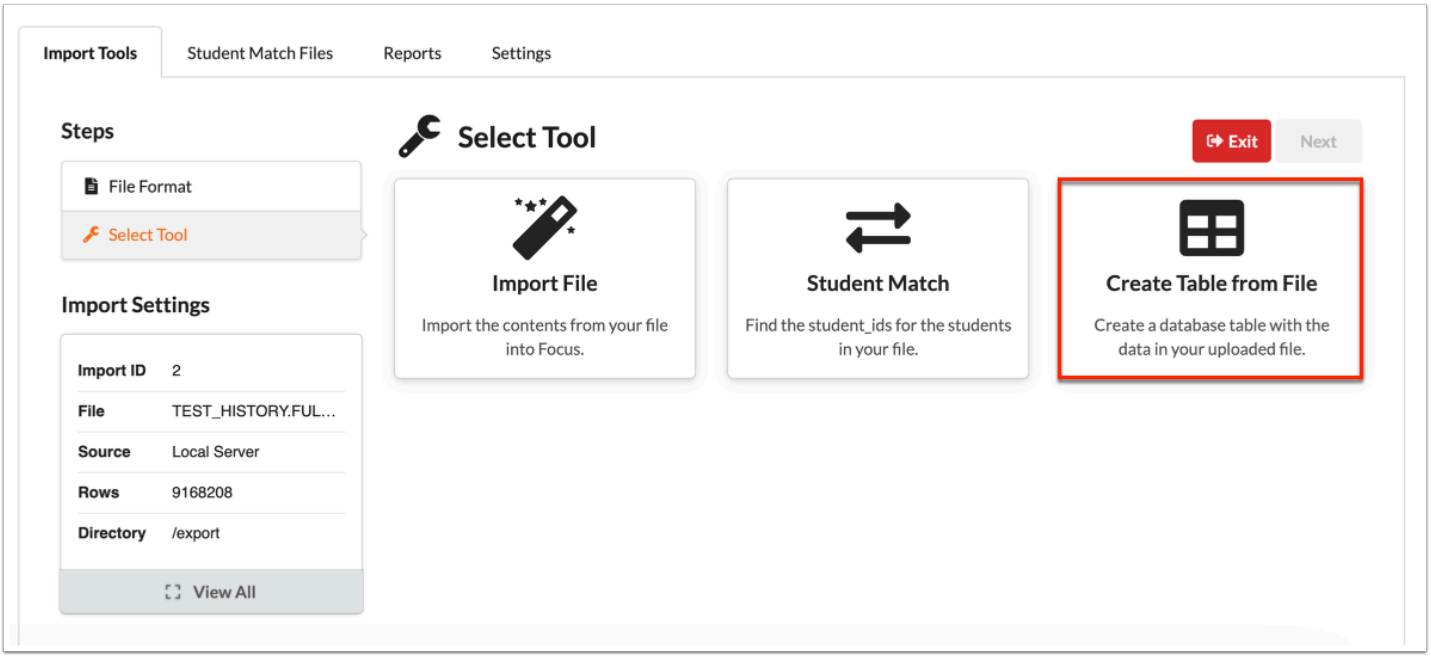
9. Click **Exit** to return to the main Imports screen.



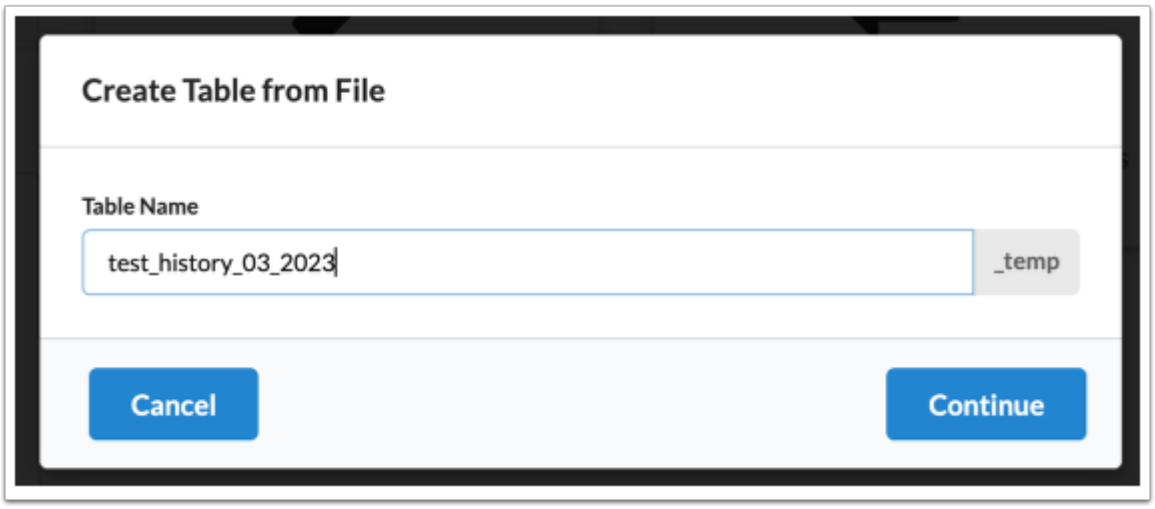
Import Tools: Create Table from File

1. Follow the steps described in Import Tools (Importing a File).

2. Click **Create Table from File**.



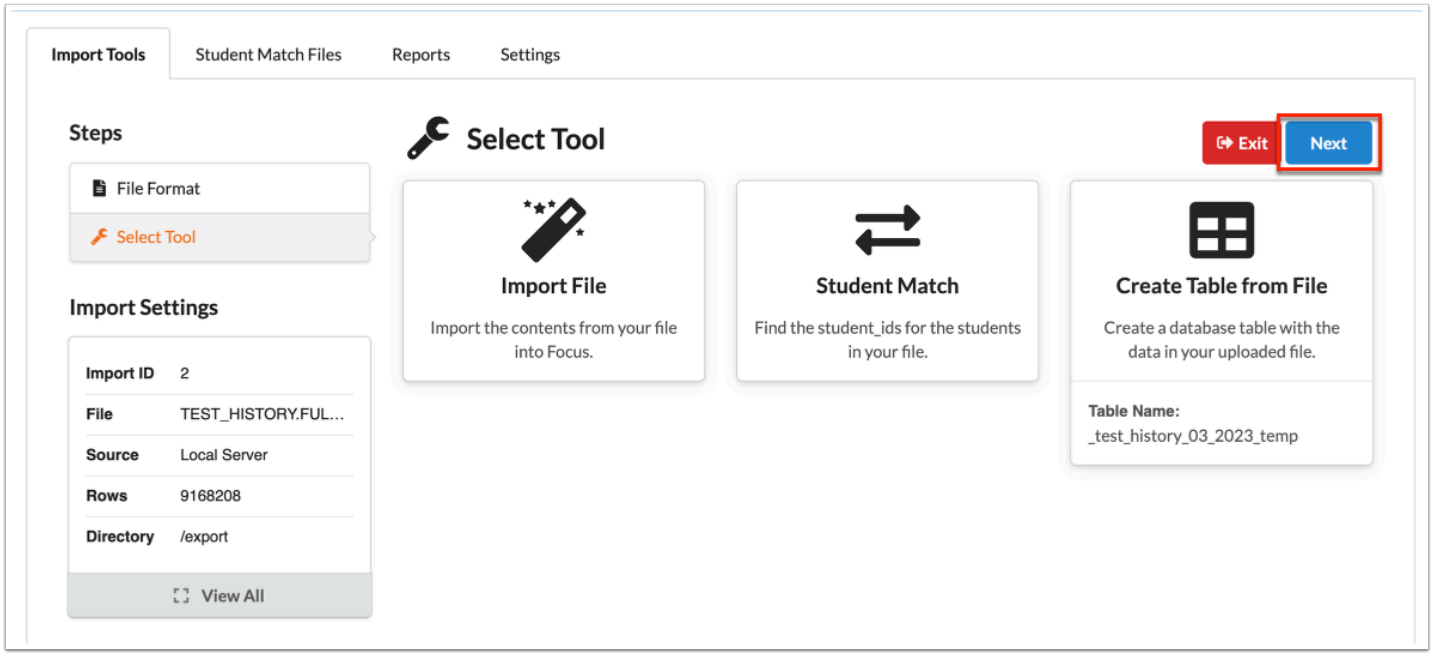
3. Enter a custom title for the table in the **Table Name** text box.



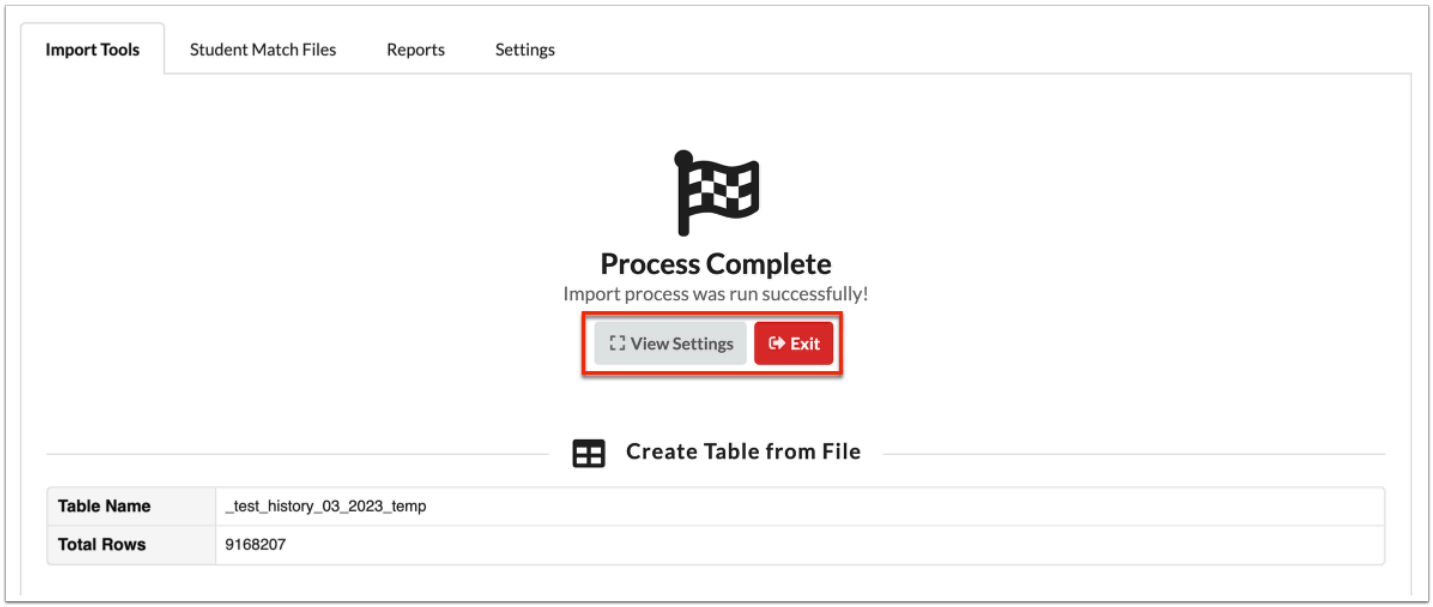
4. Click **Continue**.

> All temporary tables will be given the suffix _temp. Entering a name that already exists displays confirmation message.

5. Click **Next**.



6. Once complete, a message displays that the Import process was run successfully! Click **Exit** to return to the main Import Tools screen or click **View Settings** to review information pertaining to the import.



Import Tool Requirements

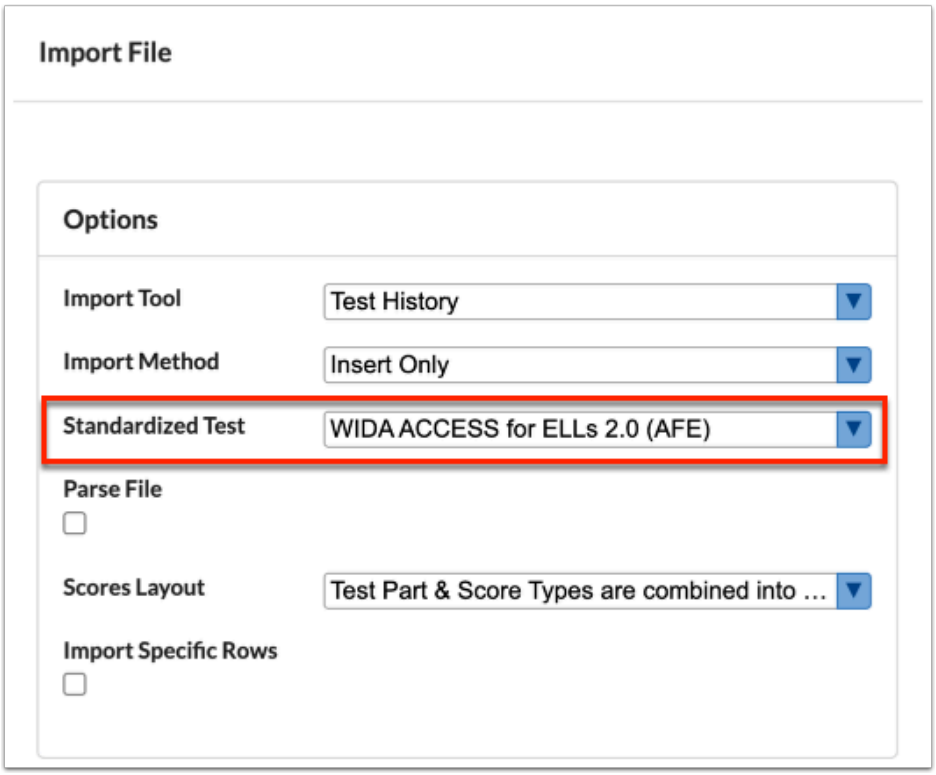
Test History

Standardized Test

> Select a Standardized Test is optional. Focus accepts a blank value.

1. Following the steps described in Import Tools: Import File, in the Import File pop-up window, select **Test History** from the **Import Tool** pull-down.

2. Select the applicable **Standardized Test** from the pull-down for which you are importing data.



The listed standardized tests pulls from tests set up via Assessment > Standardized Tests.

Scores Layout Description

There are currently three different options for importing test scores into Focus and the one that should be used will depend on how your source file is structured.

Standard

This type of file structure allows you to include a column for Test ID, Part ID, Score Type ID, and Score Value. There aren't any known providers that work with this structure but you may rearrange your file to this format as an alternative. You will have multiple rows for the same student and test administration.

Click the file/link below to download the THL Importer file layout.

Test History Standard Layout.xlsx

File header example:

```
|Student_ID|Admin_date|Test_ID|Part_ID|Score_type_ID|Score|
```

Score Types are split from Test Part columns

There's just one set of score columns but also one column for Test ID and one column for Test Part to identify the part those scores belong to for the test. You will have multiple rows for the same student and test administration. Score Types are split from Test Part columns.

This structure is also used in the Florida EOC tests, for example, but without a Test ID column, it needs to be run with method #1 described above.

File header example:

```
|Student_ID|Admin_date|Test_ID|Part_ID|Raw_Score|Scale_Score|National_percer
```

Test Part & Score Types are combined into one or more columns

In general, this is how third-party systems will generate their scores extracts. You'll have multiple sets of score columns where each set represents a specific test part. In this type of structure you won't have a column in the file with the Part Code ID. It should also have one record per student and test administration date.

Layouts are provided by the third-party system.

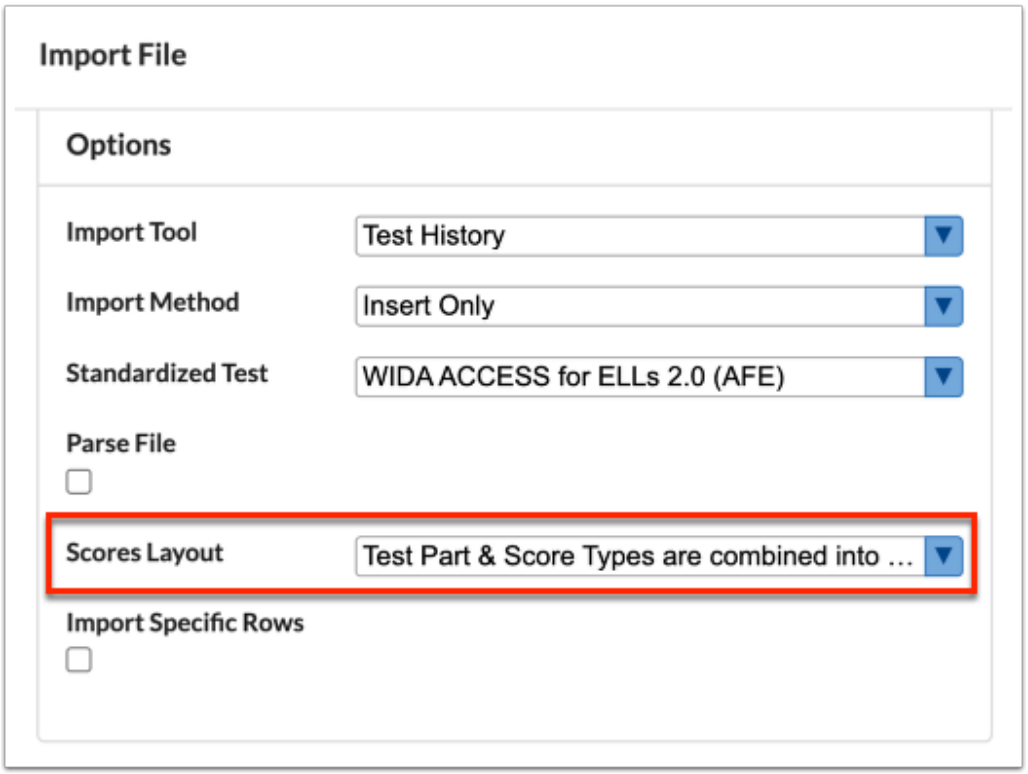
File header example:

```
|Student_ID|Admin_date|Eng-SS|Eng-RS|Eng-NP|Math-SS|Math-RS|Math-NP|Sci-SS|
```

Scores Layout Application

1. Following the steps described in Import Tools: Import File, in the Import File pop-up window, select **Test History** from the **Import Tool** pull-down.

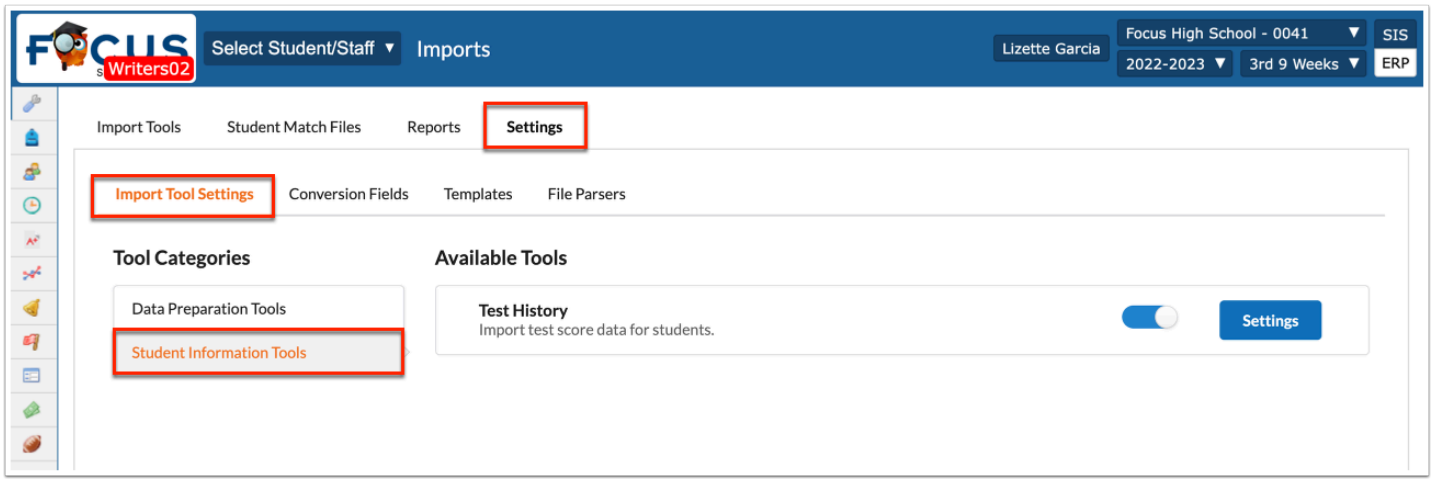
2. Select the **Scores Layout** from the provided pull-down. To determine the layout needed, see Scores Layout Description.



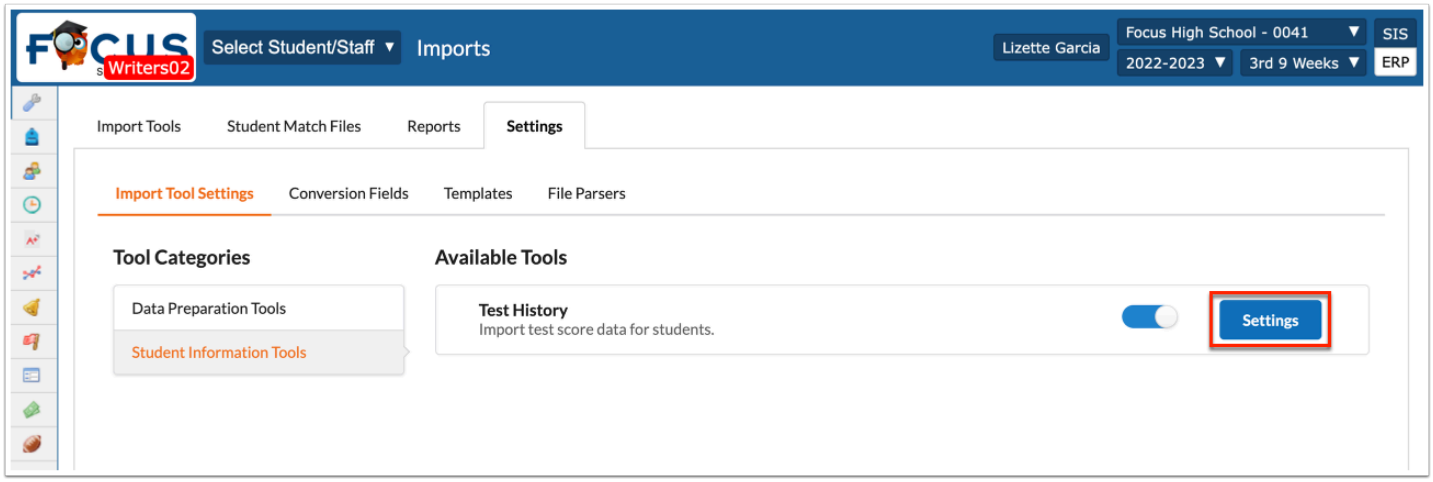
Any score layout option can and should be selected depending on how the file is formatted. When a Standardized Test is not selected (field is left blank) only two options are available (Split and Standard); however, only when a test is selected will all 3 options become available. At which point, "Combined" is the default option, which can still be changed to a different option when needed.

Import Key Fields Setup

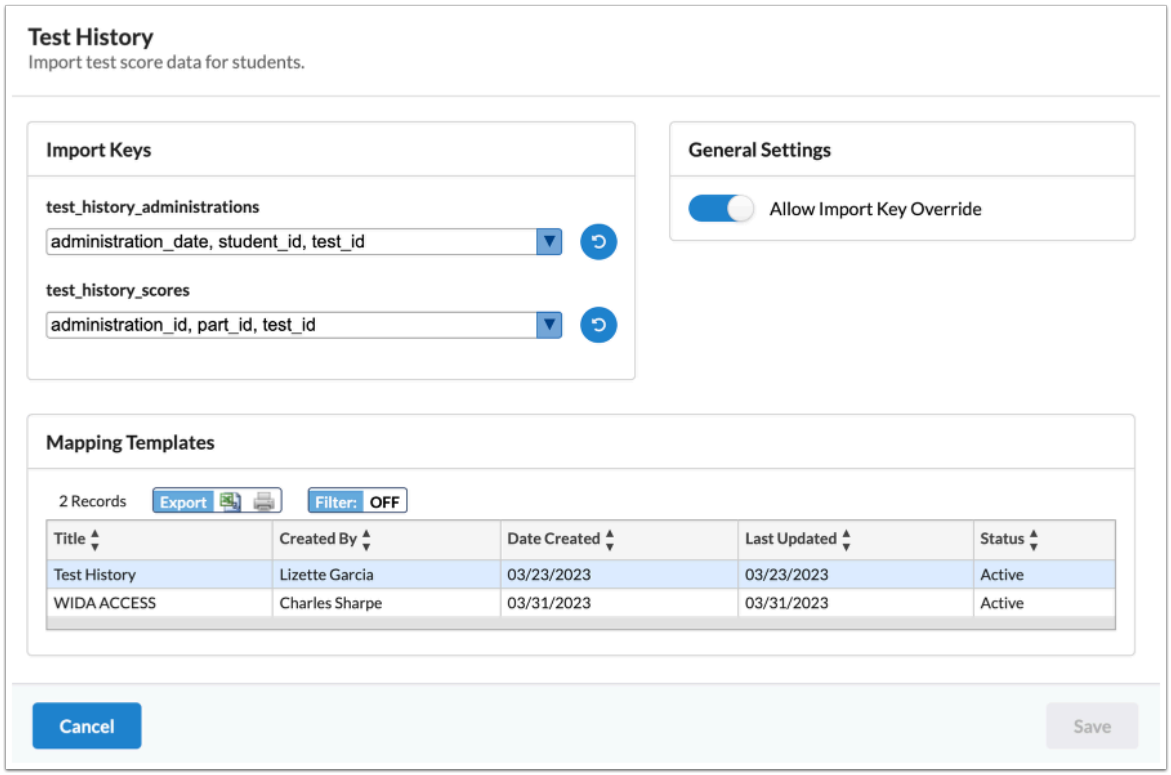
1. Import Keys can be reviewed and edited via Imports > Settings tab > Import Tool Settings tab > Student Information Tools tab.



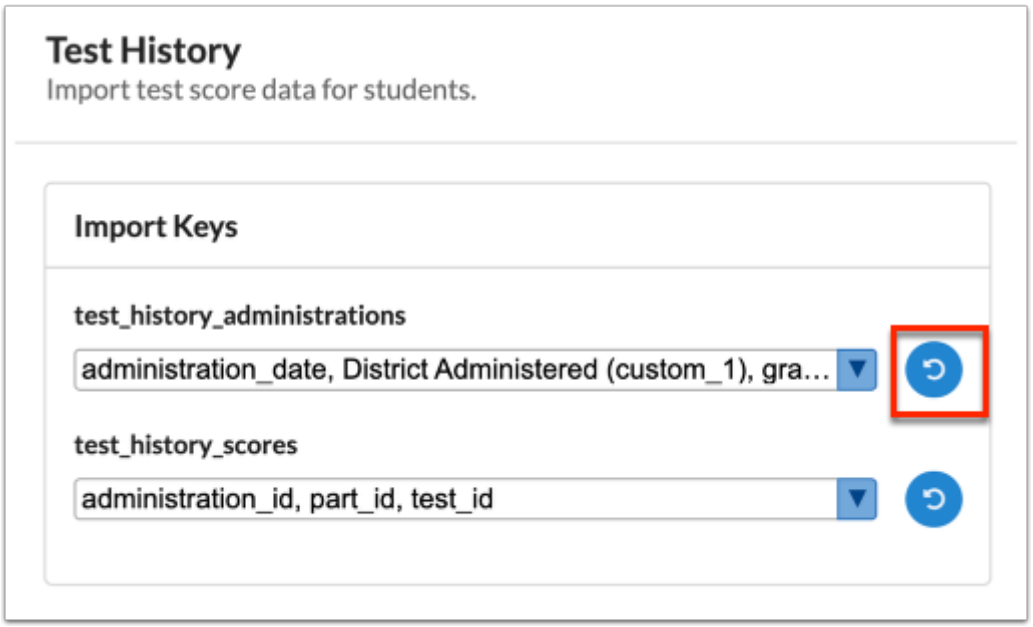
2. Click **Settings** for Test History.



3. Focus' default import keys are selected by default. Click the provided pull-down for **test_history_administrators** and/or **test_history_scores** to change the selections made.



Click the circular arrow to clear your selections made and revert back to the Focus defaults.



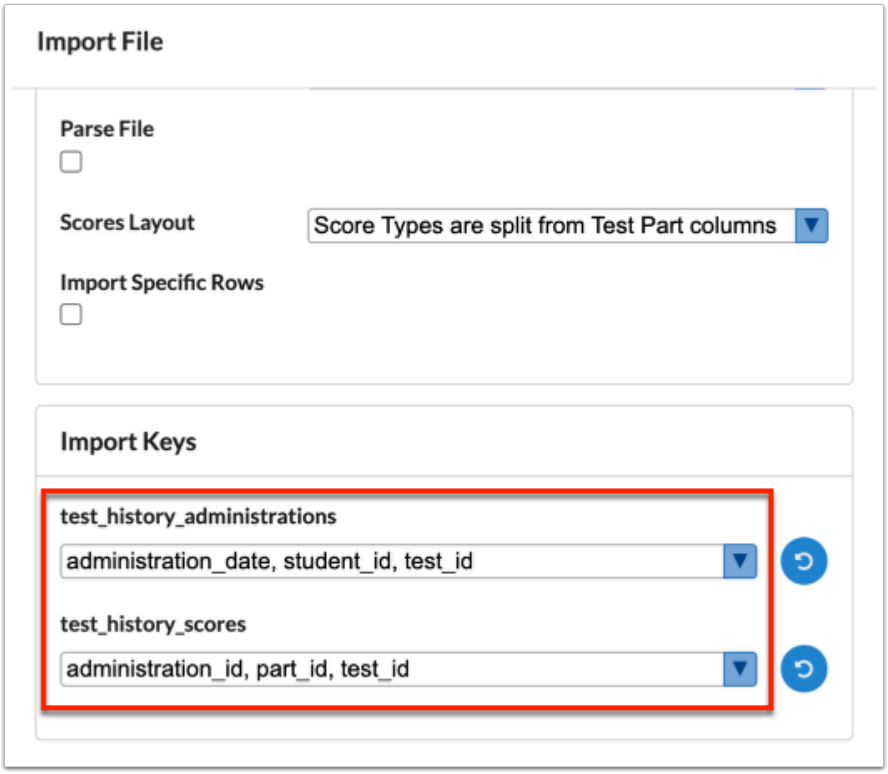
See Settings > Import Tools Settings > Student Information Tools for more information.

Import Key Application

1. Following the steps described in Import Tools: Import File, in the Import File pop-up window, select **Test History** from the **Import Tool** pull-down.

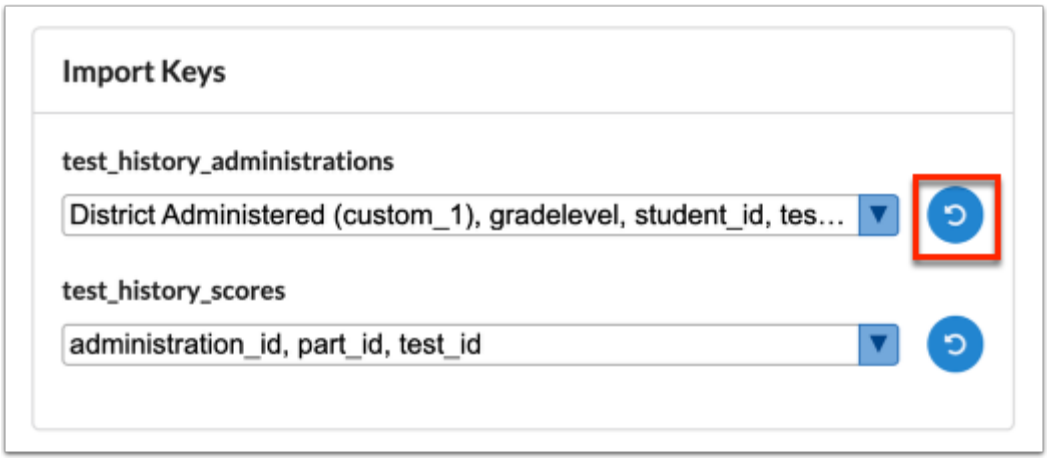
The Import Keys selected are either the Focus defaults or the selections made in setup as described in Import Key Fields Setup.

2. Click the provided pull-down for **test_history_administrators** and/or **test_history_scores** to change the selections made.



The Import Keys section displays if the **Allow Import Key Override** setting has been enabled for the selected import tool via Imports > Settings > Import Tool Settings > Student Information Tools.

Click the circular arrow to clear your selections made and revert back to the defaults assigned in setup.



Conversion Fields

Conversion Fields determine how the import process converts a value, such as the part_id: ENG to a value Focus can understand and place, such as 237. Therefore, if subject_code is selected as the default conversion field for part_id, Focus will know to convert the subject code into the part ID.

Conversion Fields are set up via Imports > Settings > Conversion Fields. See Conversion Fields for more information.

The Default conversion fields are as follows:

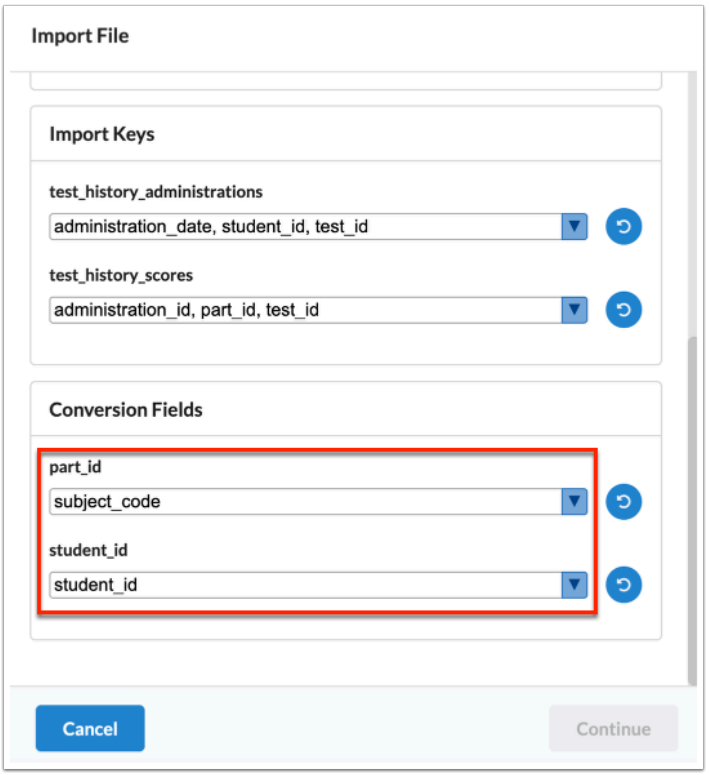
For part_id, the default is subject_code.

For student_id, the default is student_id.

1. Following the steps described in Import Tools: Import File, in the Import File pop-up window, select **Test History** from the **Import Tool** pull-down.

The Conversion Fields selected are either the Focus defaults or the selections made in setup as described in Conversion Fields.

2. Click the provided pull-down for **part_id** and/or **student_id** to change the selections made.



Click the circular arrow to clear your selections made and revert back to the defaults assigned in setup.

Student Match Files

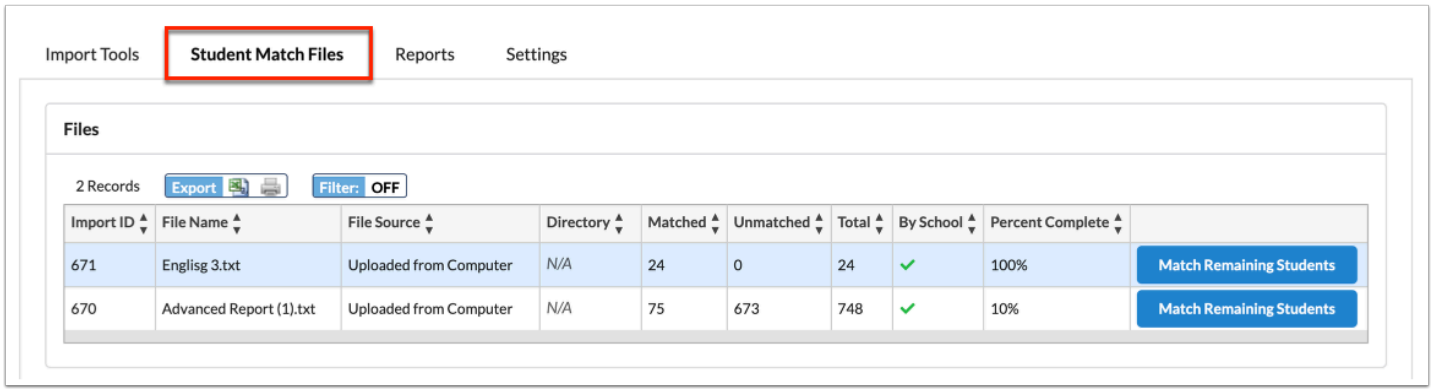
The Student Match Files tab allows users to review student matches started and complete the process. A Student Match import must first be conducted before users can view the process from this tab. The Student Match import tool is used to find student_ids for the students in an uploaded file.

Only files where the Student Match process has been initiated as part of the Import steps in the Import Tools tab will display here. When an import has been completed, that Import ID will no longer be displayed in this tab.

1. Follow the steps described in Import Tools (Importing a File).

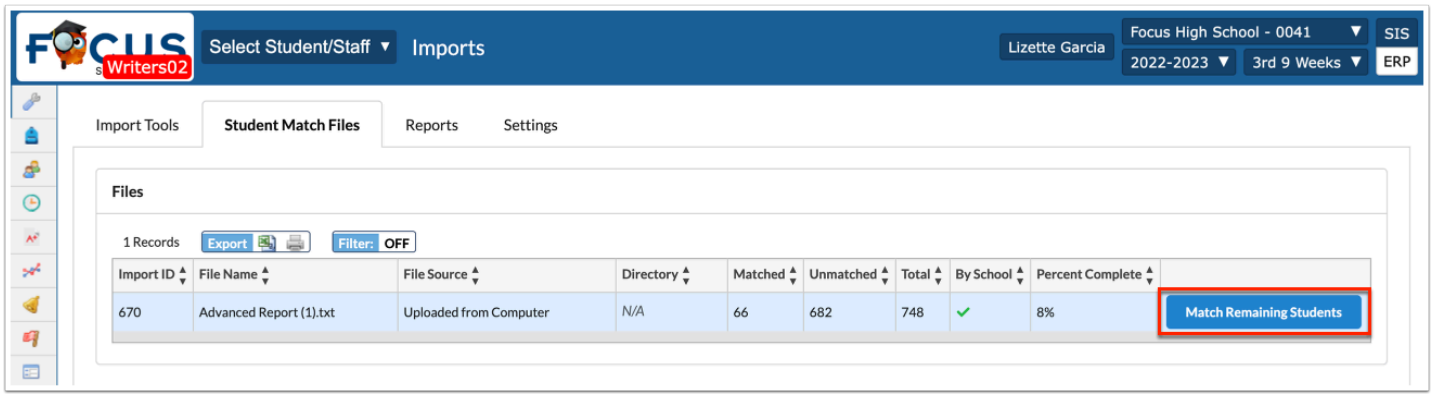
2. Follow the steps described in Import Tools: Student Match.

3. Click the **Student Match Files** tab.

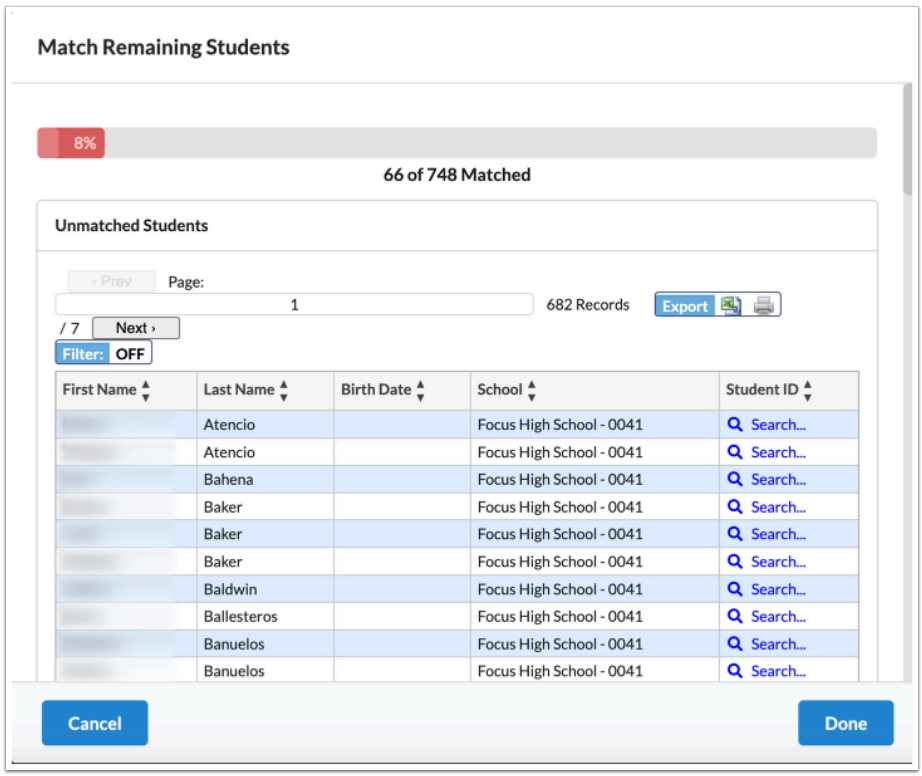


Here you will find information about the student match import including the Import ID, File Name, File Source, Directory (if applicable), records Matched, records Unmatched, Total records, if matched By School, and the Percent Complete.

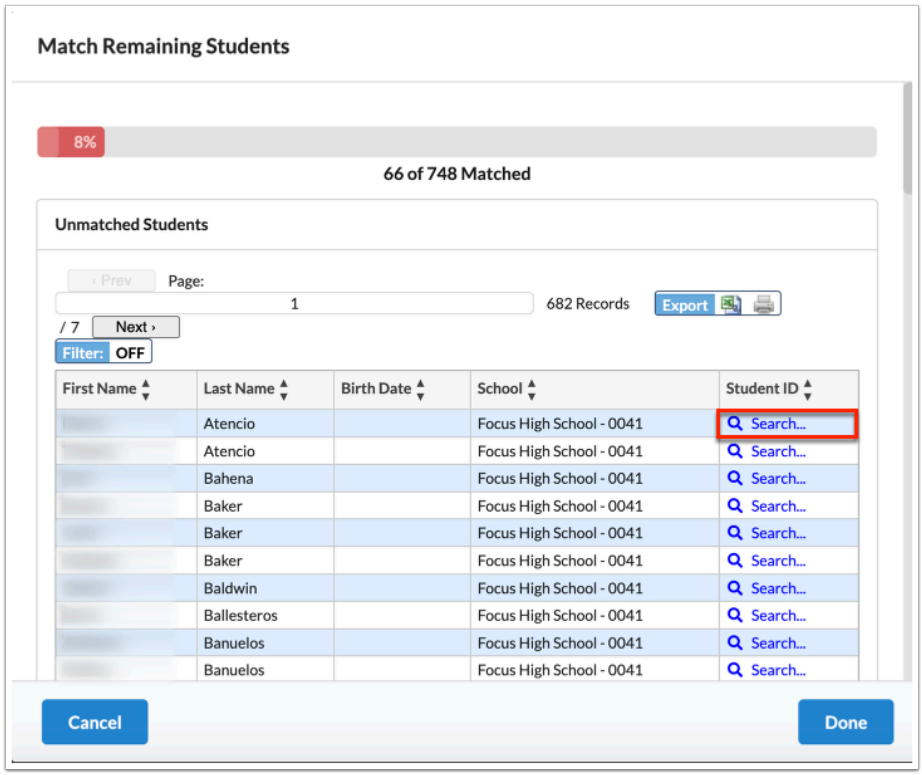
4. Click **Match Remaining Students** to manually match the remaining students and complete the process.



The percentage bar shows how many students have been matched automatically. The Unmatched Students section displays all the students who were not automatically matched.



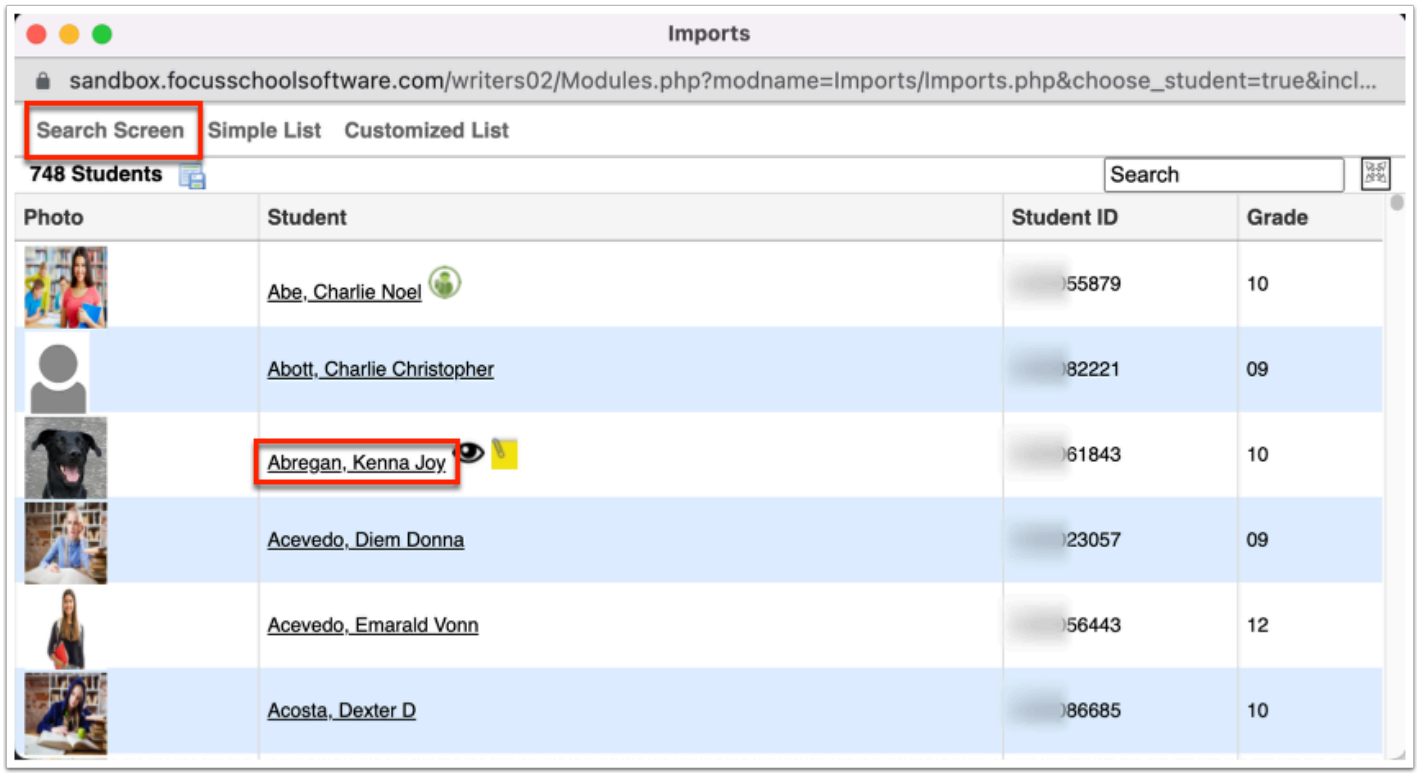
5. Click **Search** to conduct a student search and match a student manually.



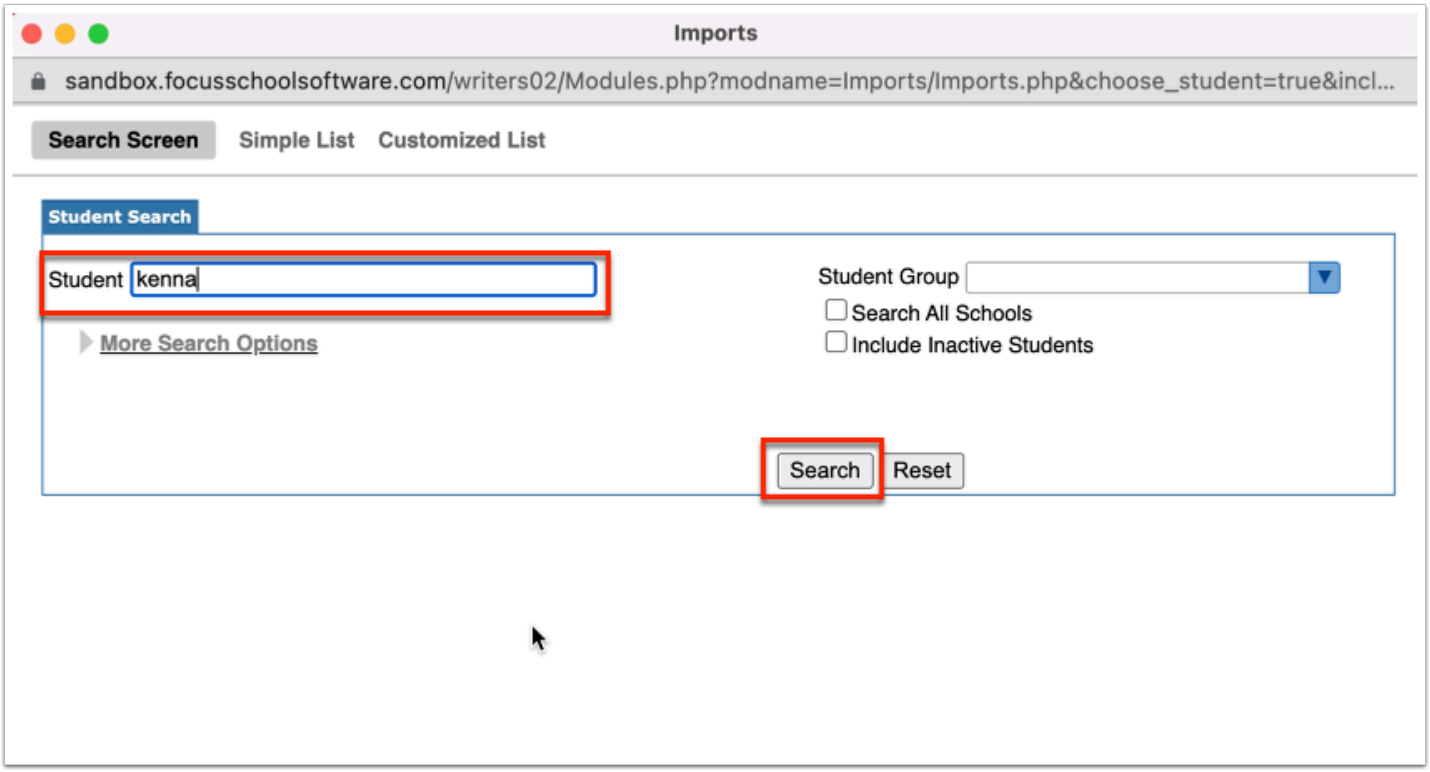
a. Scroll through the listed students until you find the correct student, then click the **Student** name to manually match them.

OR

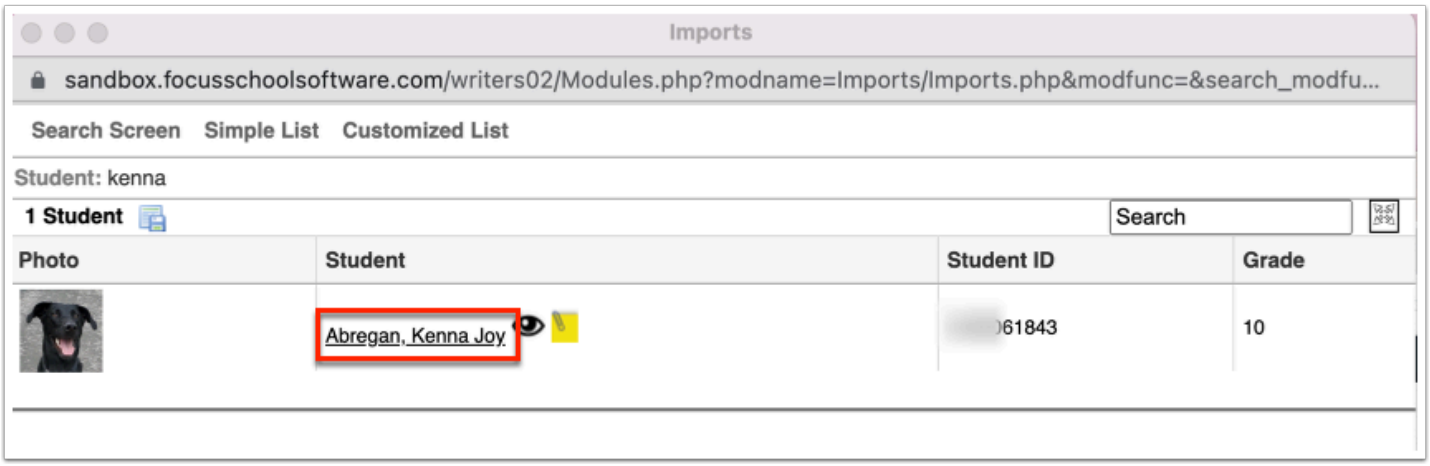
Click **Search Screen** to conduct a student search.



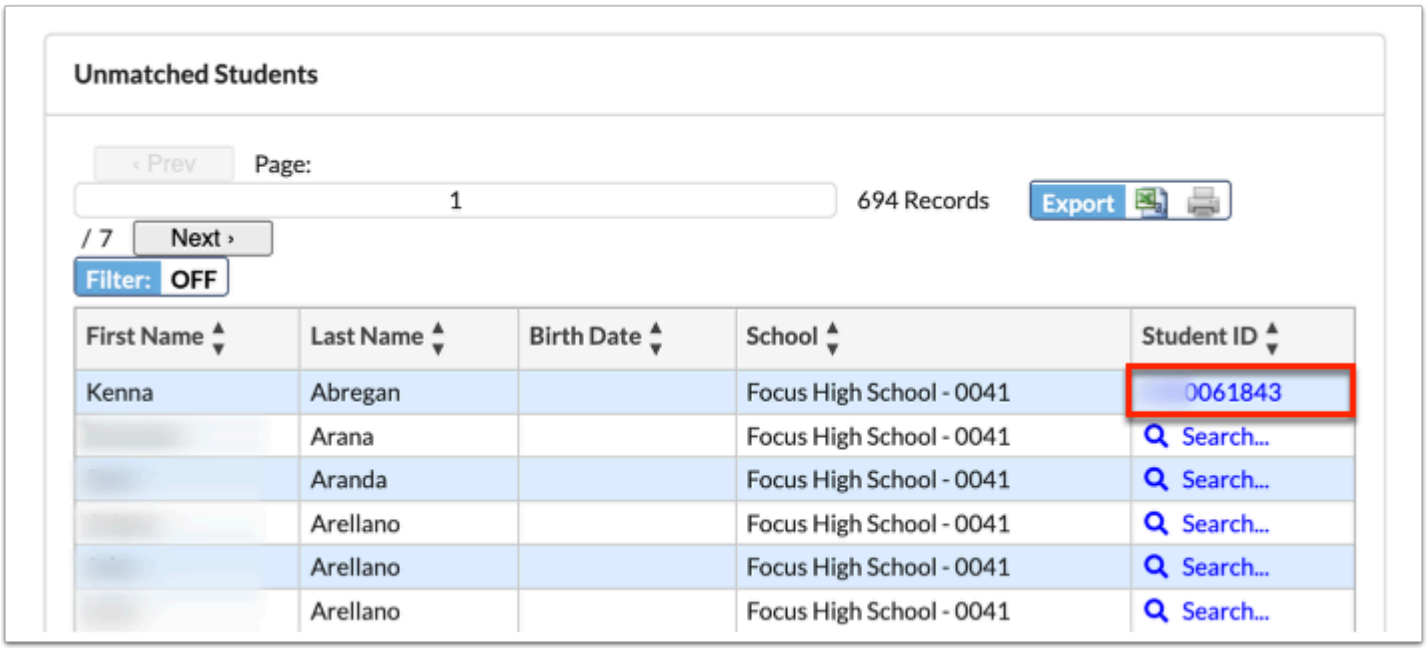
b. If conducting a student search from the Search Screen, enter student information in the **Student** text box and click **Search**. See Searching for Students for detailed information.



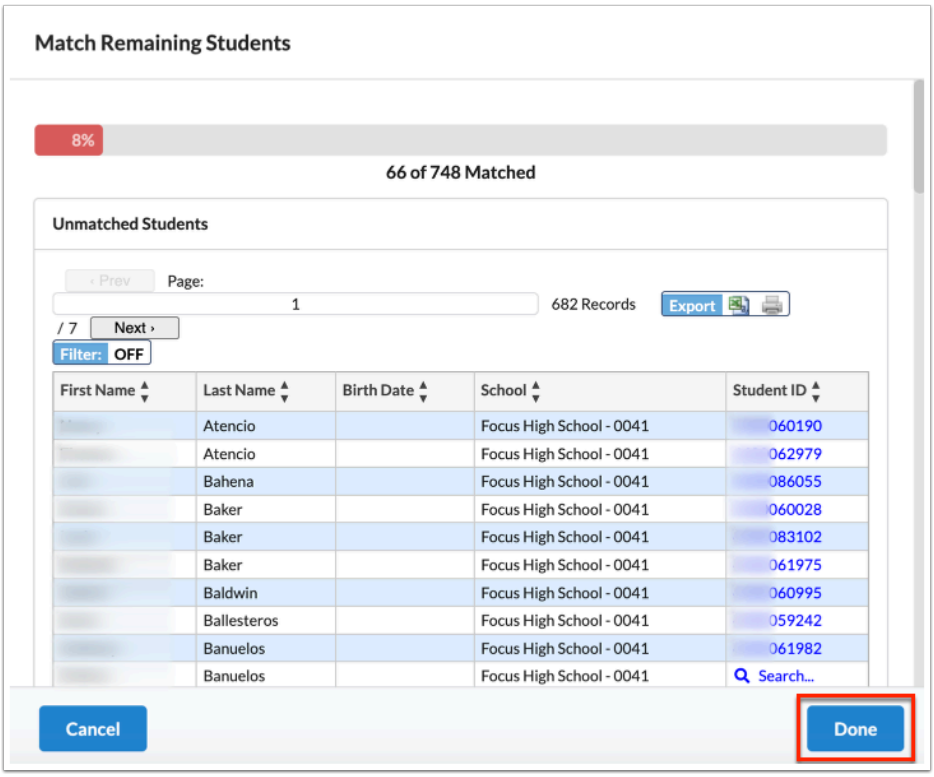
c. Click the **Student** name to manually match the student.



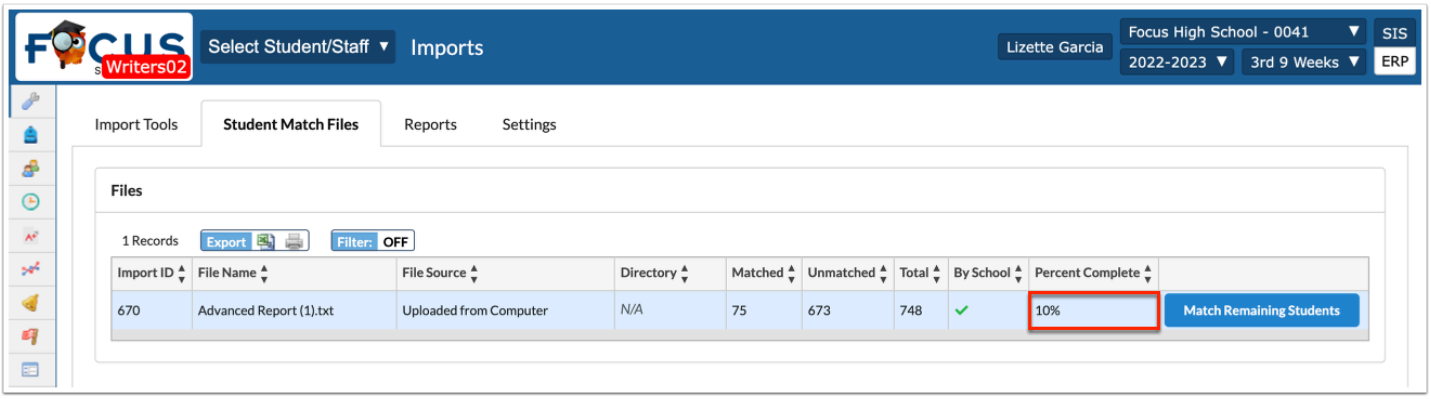
Once manually matched, the **Student ID** column is populated with the student's ID number in place of the Search link.



6. When finished, click **Done**.



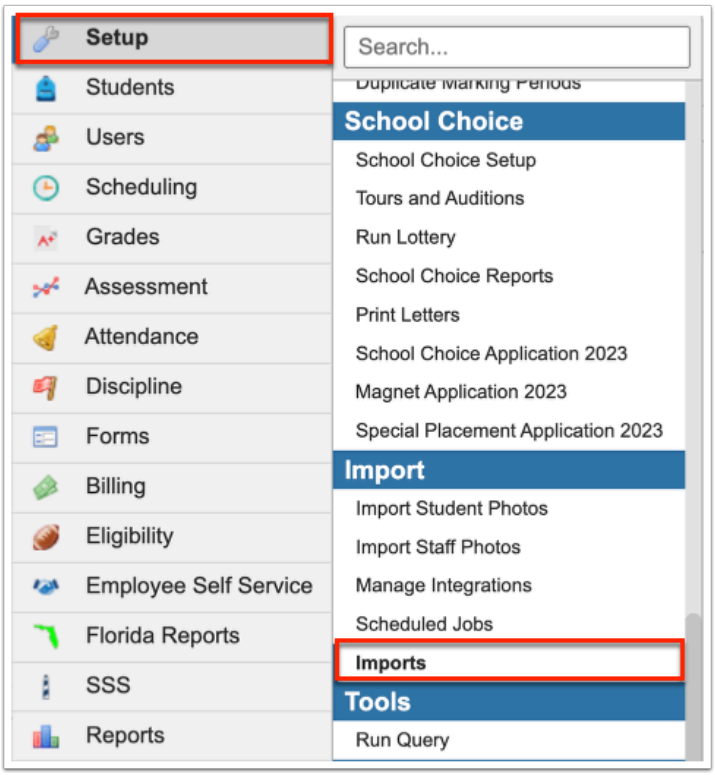
Back on the Student Match Files tab, the information is updated, so it now shows the Percent Complete is 10%.



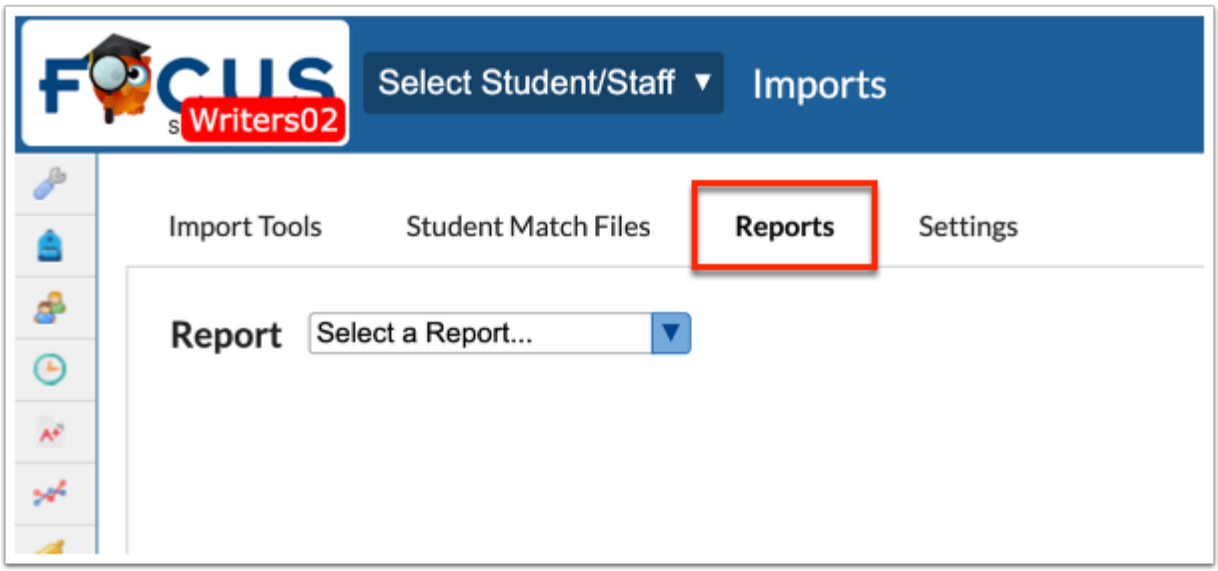
Reports

The Reports tab allows users to review a report of imports processed including date, time, import tool, file, etc.

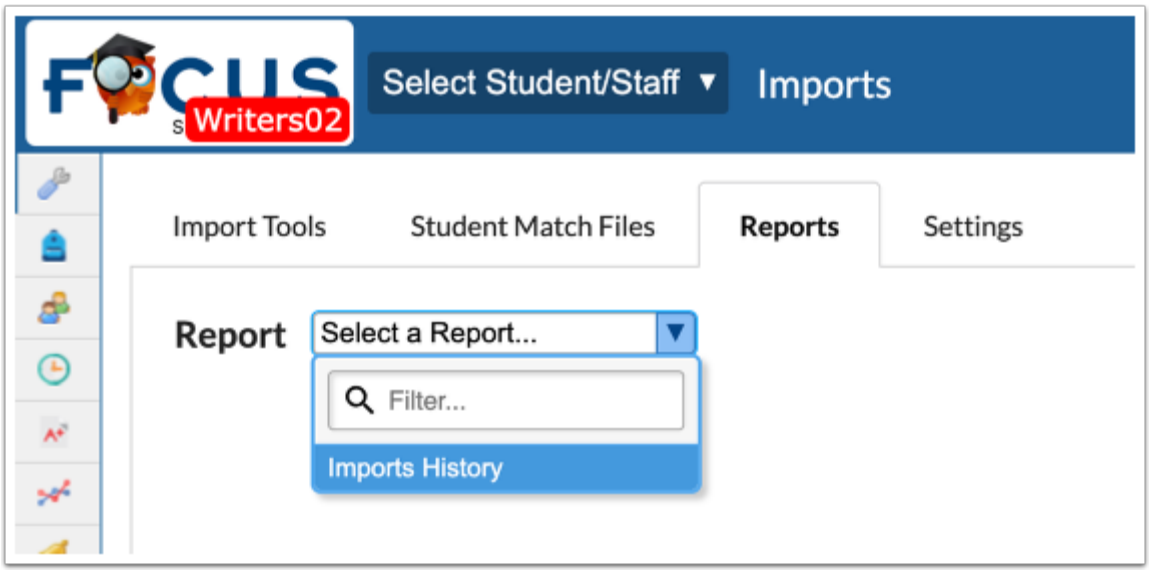
1. In the **Setup** menu, click **Imports**.



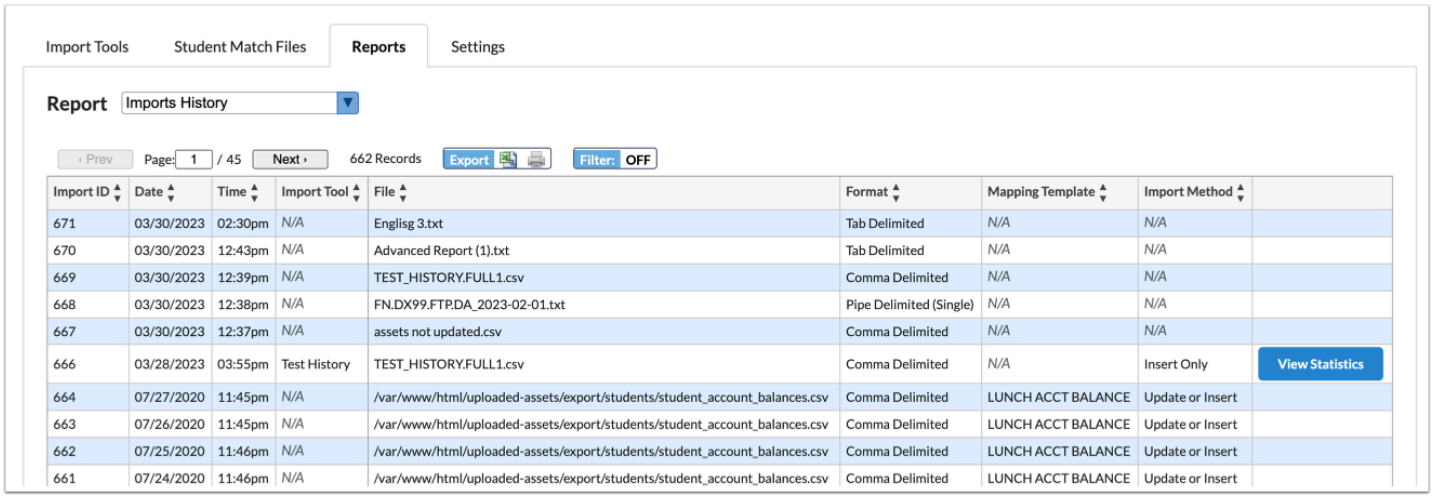
2. Click the **Reports** tab.



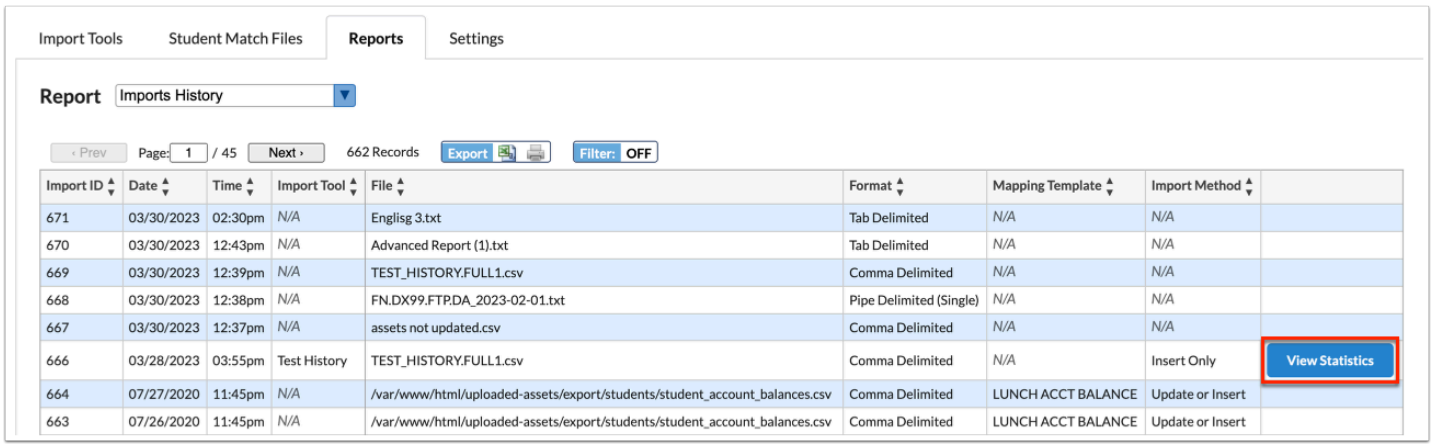
3. From the **Report** pull-down, select **Imports History**.



The report displays the Import ID, Date, Time, Import Tool, File, Format, Mapping Template, and the Import Method.

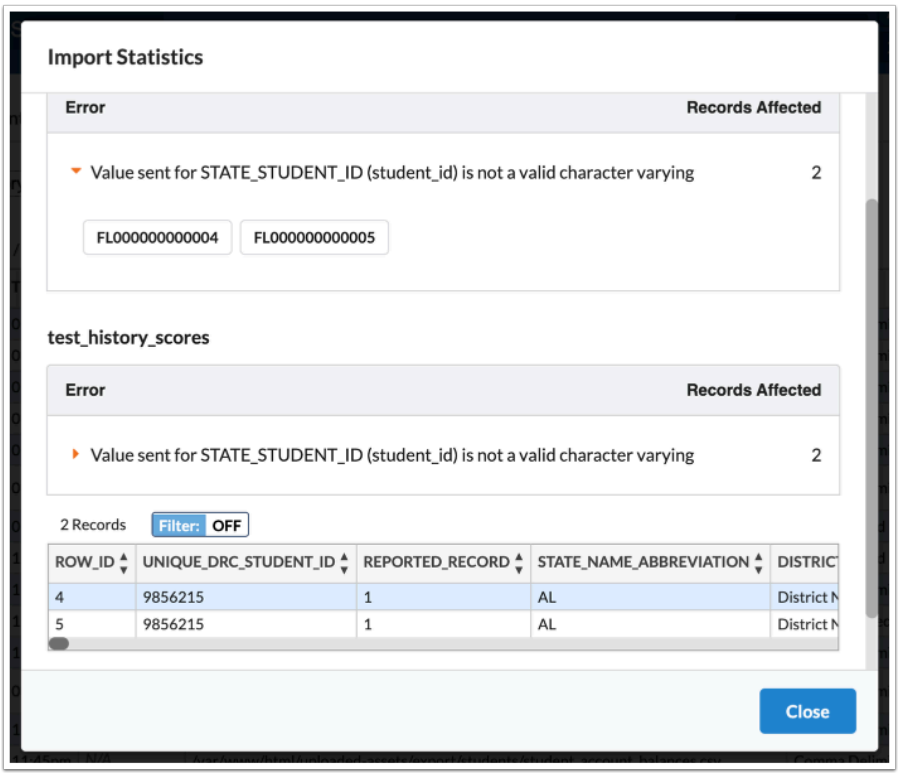


4. Click **View Statistics** to review any data errors and additional information about the import.

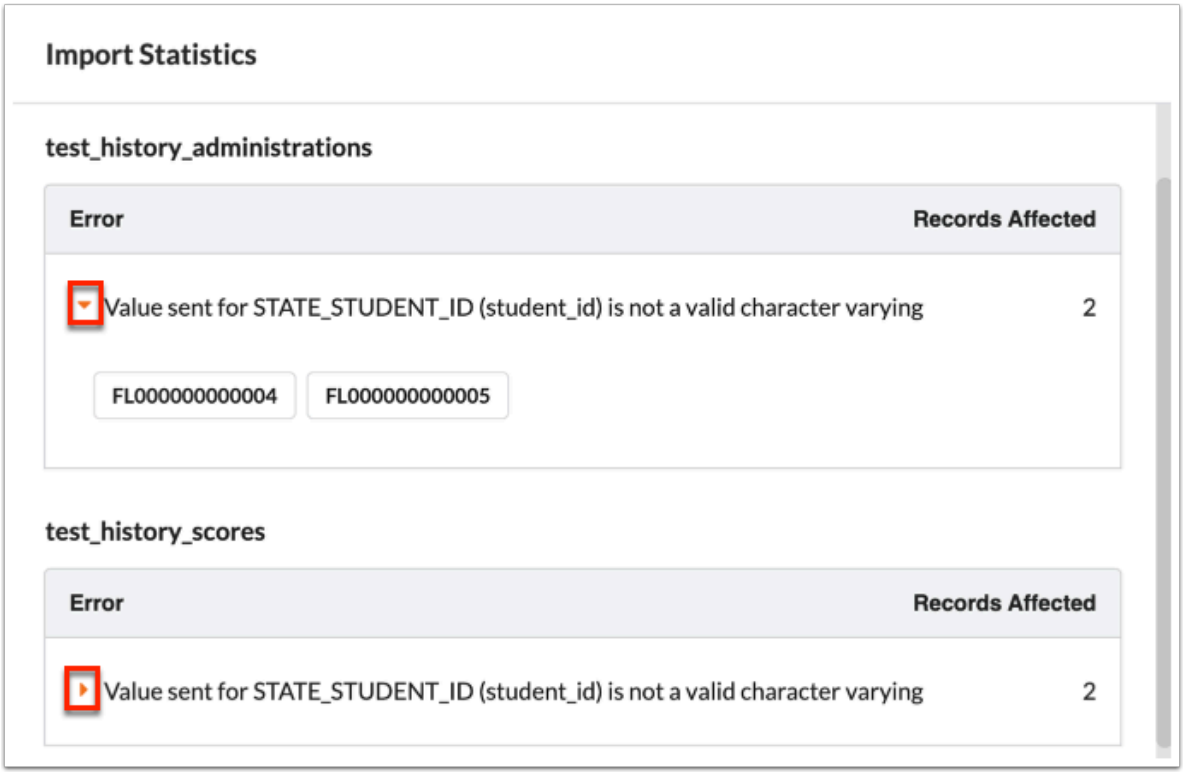


View Statistics displays when an import process has reached the validation step or when an import process has been successfully completed.

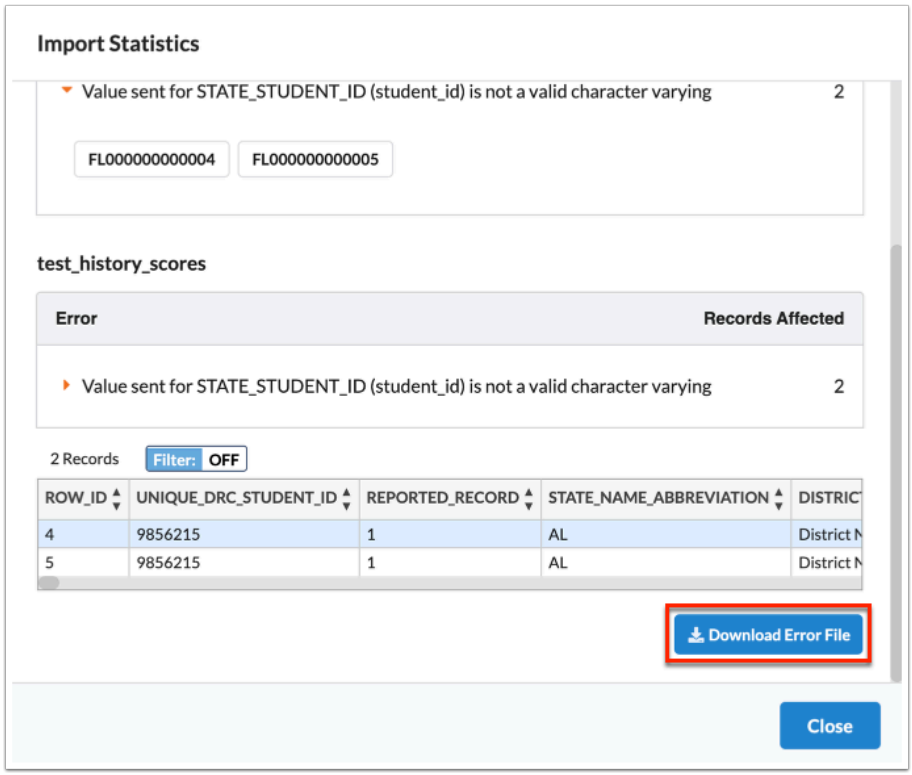
In the Import Statistics pop-up window, you can review listed errors.



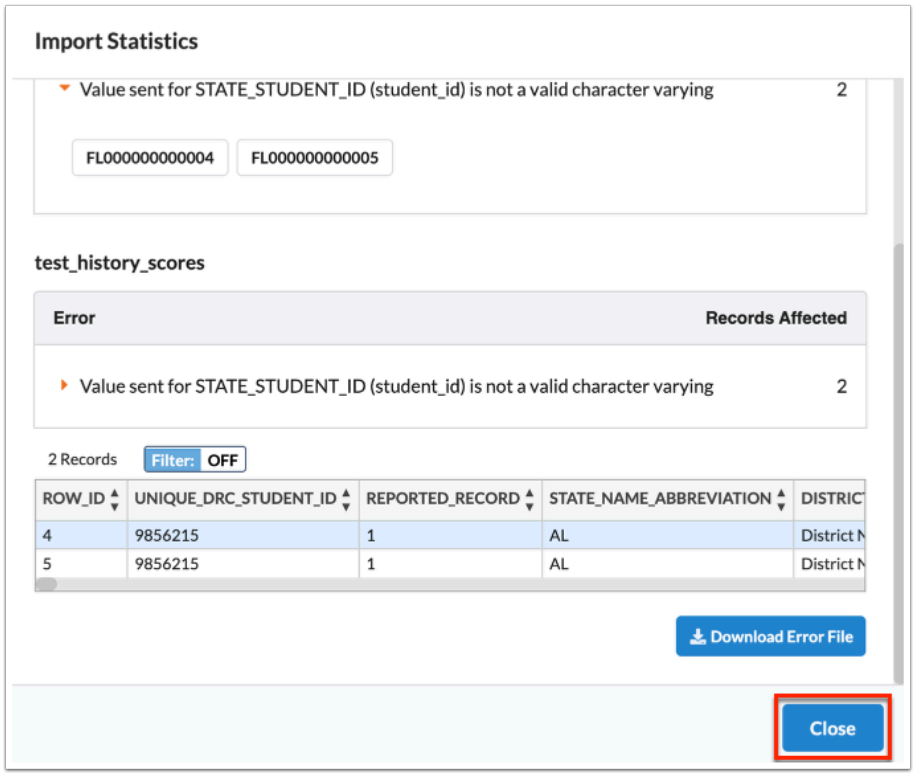
a. Click the red arrows to open details about the errors listed.



b. Click **Download Error File** to download a file of all listed errors and data to your computer.



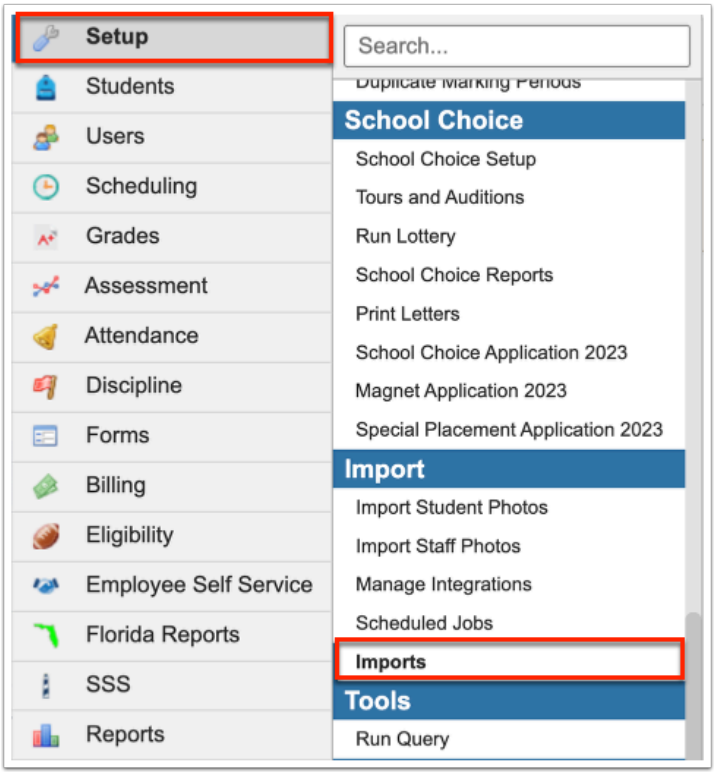
c. Click **Close** to close the pop-up window.



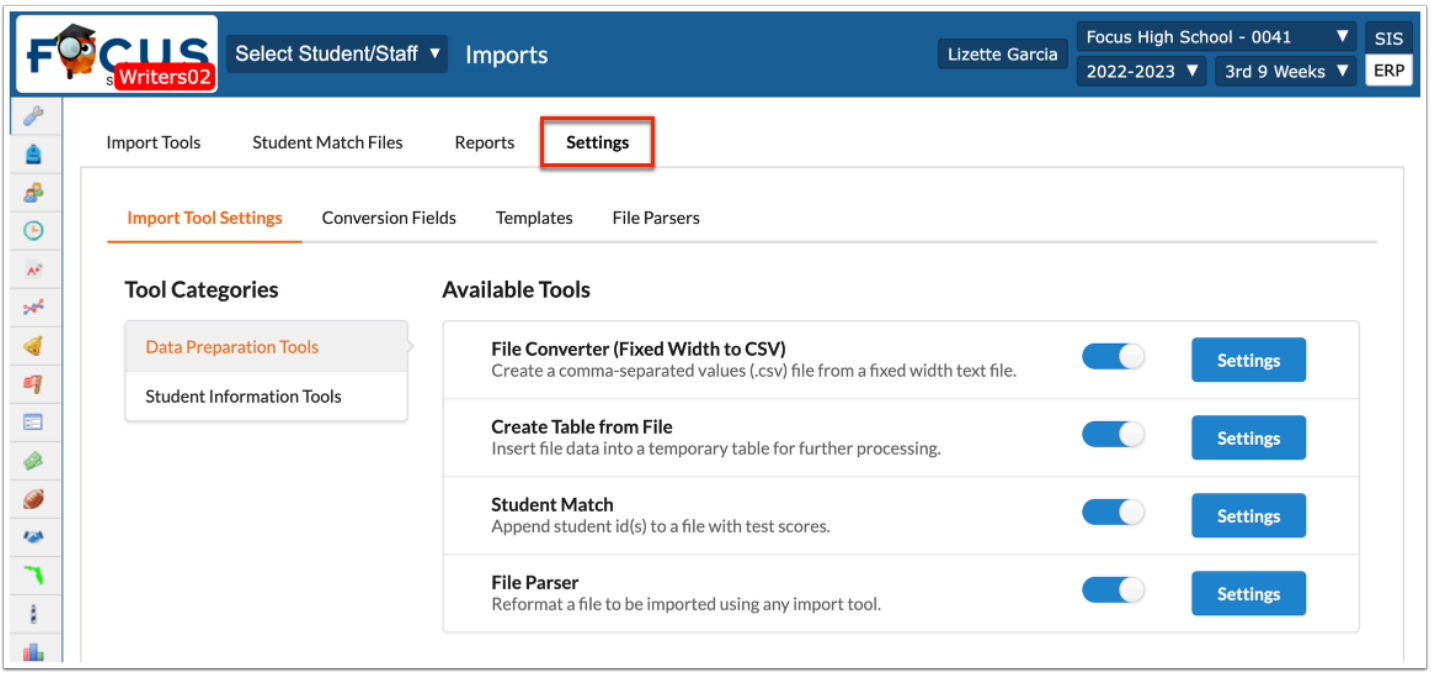
Settings

The Settings tab allows users to enable and review Import Tool Settings, review and set Conversion Fields, view, edit, and create Templates for mapping fields, and view and create new File Parsers.

1. In the **Setup** menu, click **Imports**.



2. Click the **Settings** tab.



Choose from the following tabs:

Import Tool Settings: The Import Tool Settings tab houses the Data Preparation Tools tab and the Student Information Tools tab, which allows users to enable and edit the following settings: File Converter (Fixed Width to CSV), Create Table From File, Student Match, File Parser, and Test History.

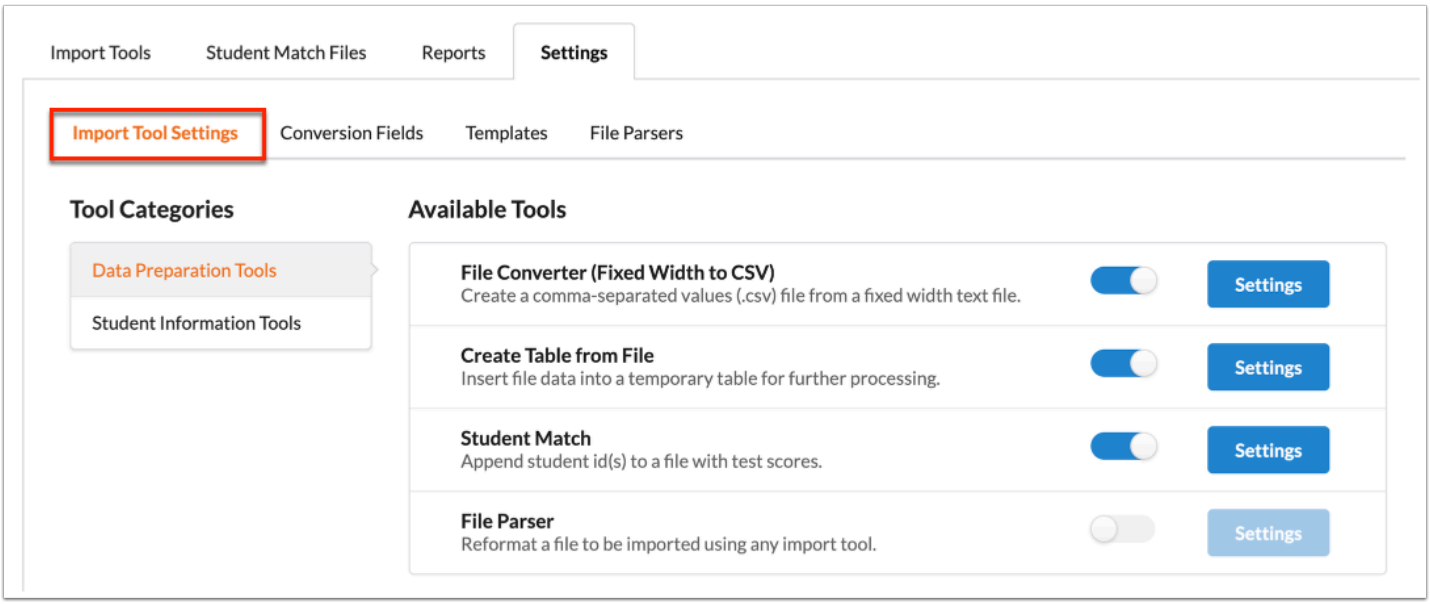
Conversion Fields: The Conversion Fields tab allows users to determine the Identifier Column, Key Conversion Fields, the Import Tools for which the conversion applies, and whether the selections should act as a default.

Templates: The Templates tab displays existing mapping templates that were created and saved or installed and allows users to edit existing templates or install new templates. Templates are used to automatically map out fields from an uploaded file.

File Parsers: The File Parsers tab allow users to create new parsers by storing the necessary SQL code as well as edit SQL code for existing file parsers.

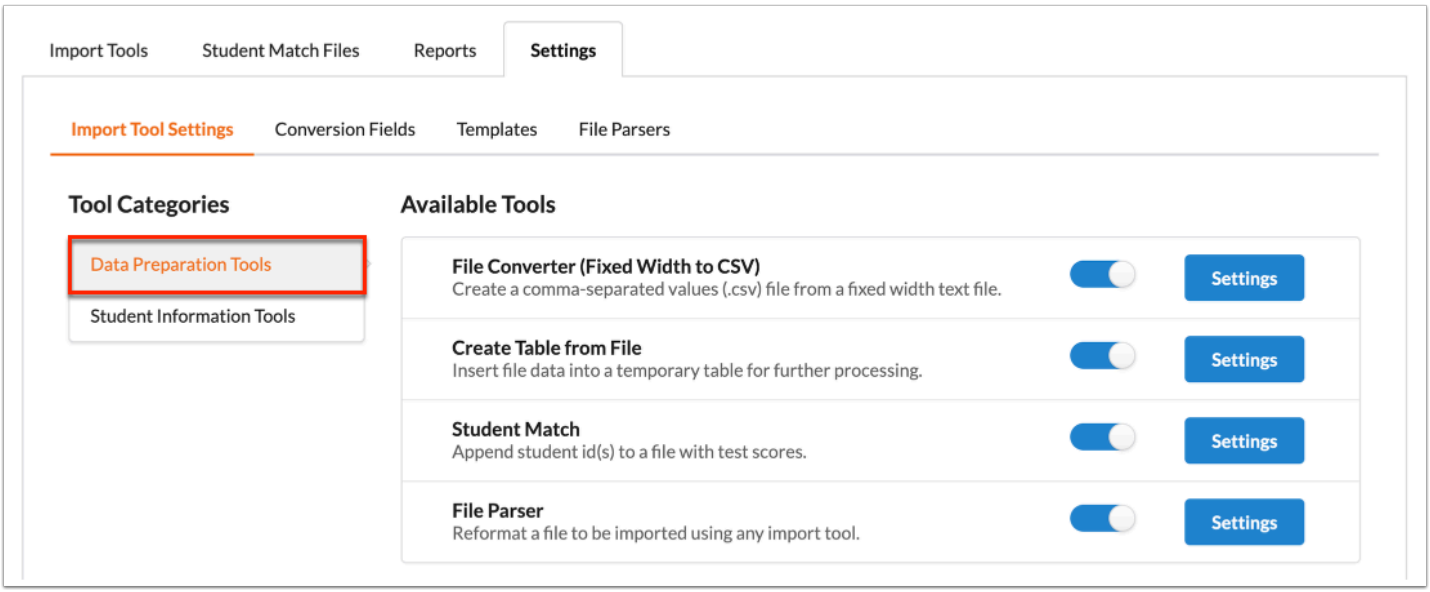
Import Tools Settings

The Settings tab defaults to the **Import Tool Settings** tab, which allows users to customize settings for import tools.



Data Preparation Tools

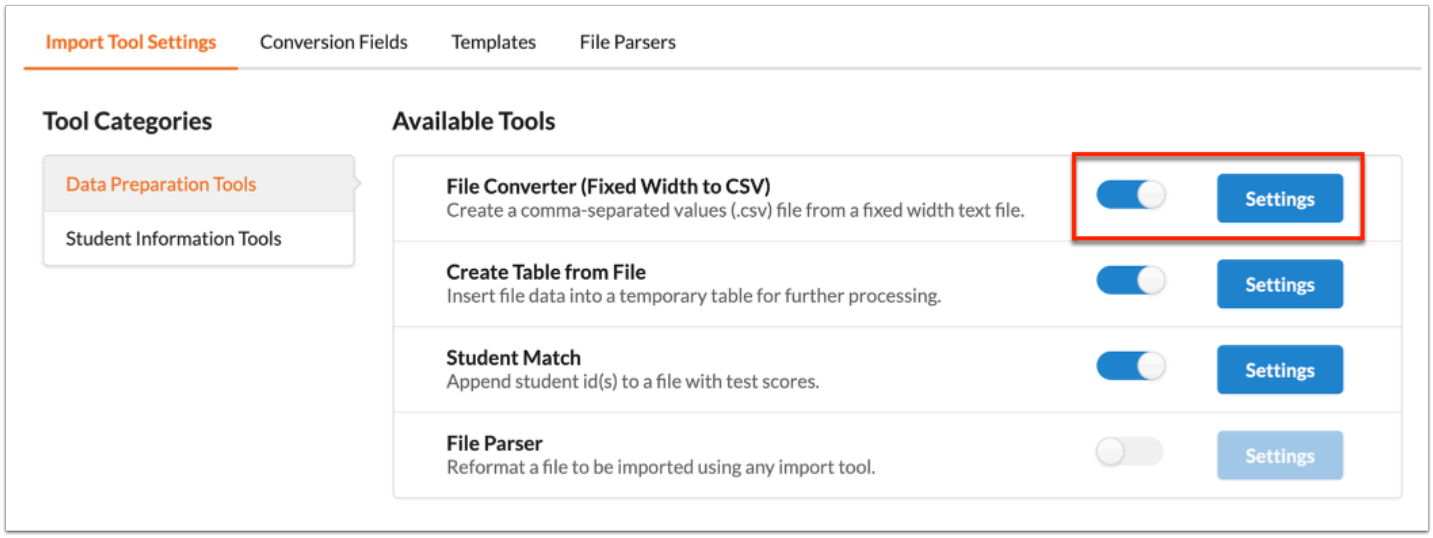
1. Click the **Data Preparation Tools** category to edit settings for the file converter, student match, file parser, etc.



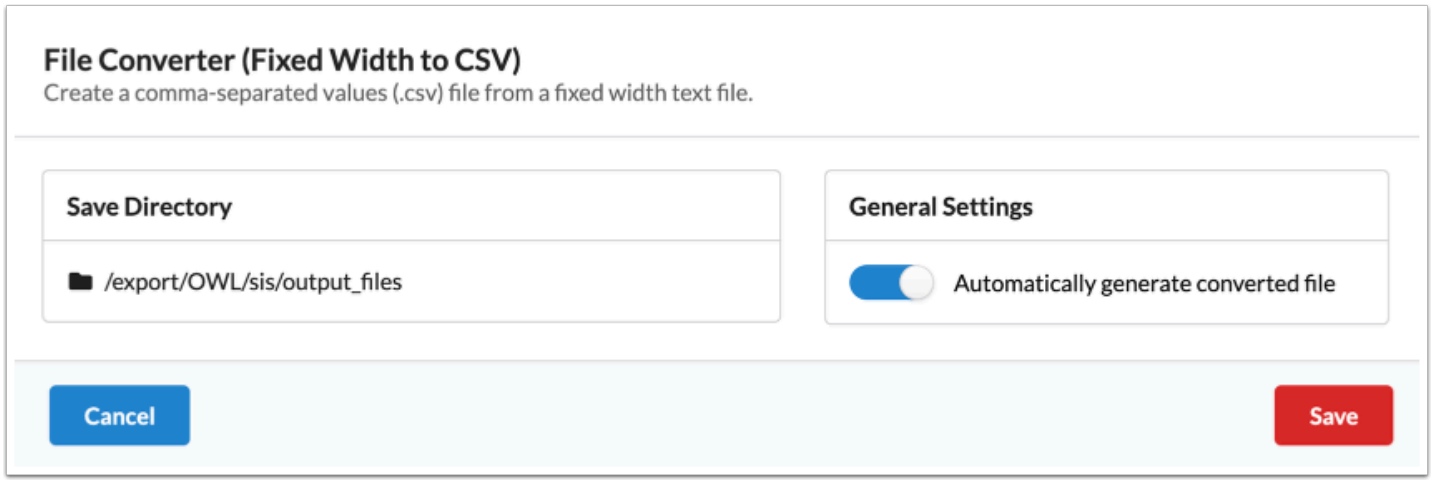
2. Click the toggle to enable the **File Converter (Fixed Width to CSV)** setting to format fixed-width files during an import.

> See File Converter: Fixed Width to CSV for more details on this process once set up is complete.

a. Click **Settings** to view information about the directory and enable general settings.



i. In the File Converter (Fixed Width to CSV) pop-up window, review the Save Directory and click the **Automatically generate converted file** toggle to automatically generate a CSV file from a fixed width file. Note: You will still be able to manually generate and download a CSV formatted version of the file in the Import Settings of the import job that has fixed width as the selected file format.

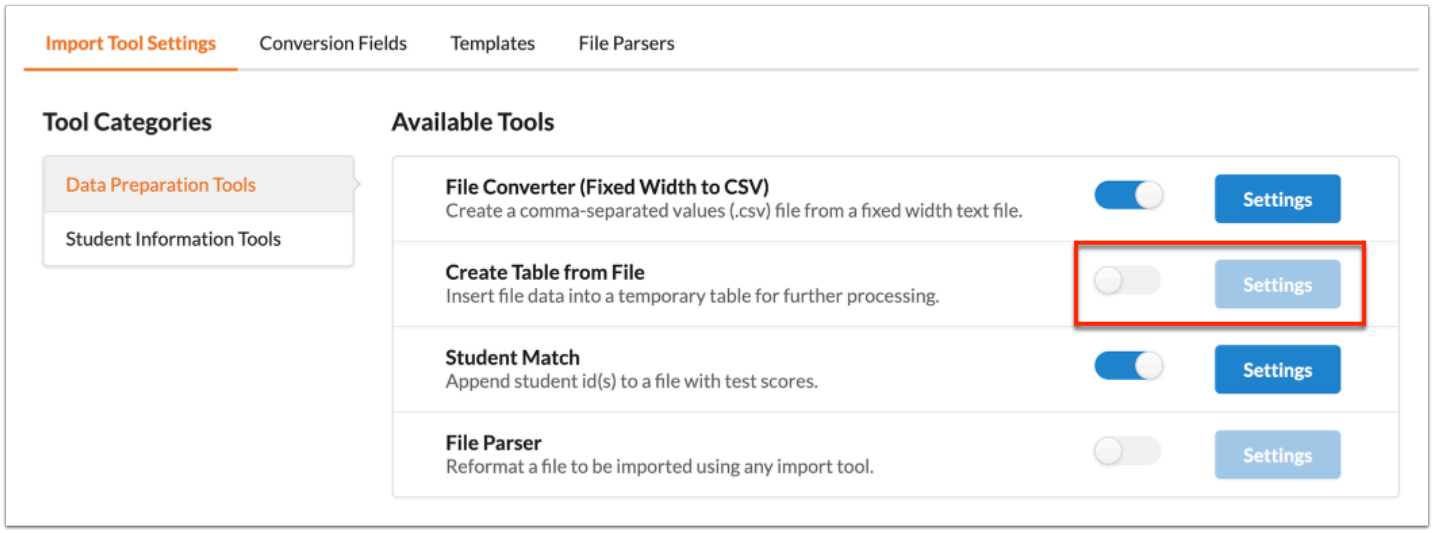


ii. Click **Save** to apply changes.

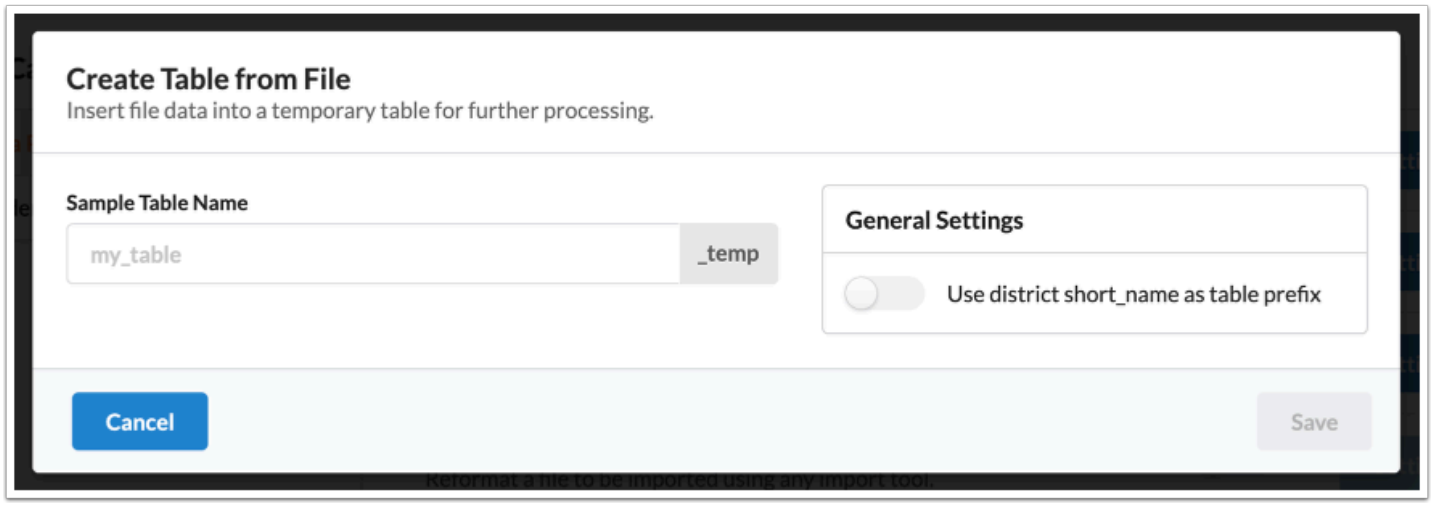
3. Click the toggle to enable the **Create Table from File** setting to insert file data into a temporary table for further processing.

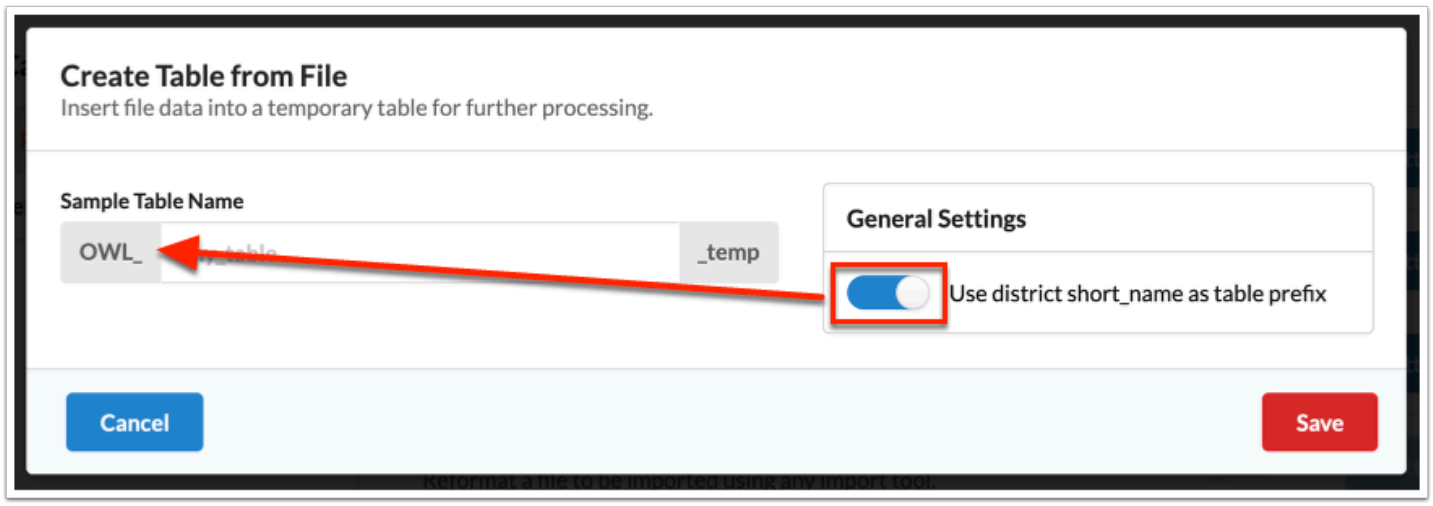
> See Import Tools: Create Table from File for detailed information about the process once set up is complete.

a. Click **Settings** to view information about the directory and enable general settings.



i. In the Create Table from File pop-up window, review the Sample Table Name and click the **Use district short_name as table prefix** toggle to use the district short_name as the table prefix.



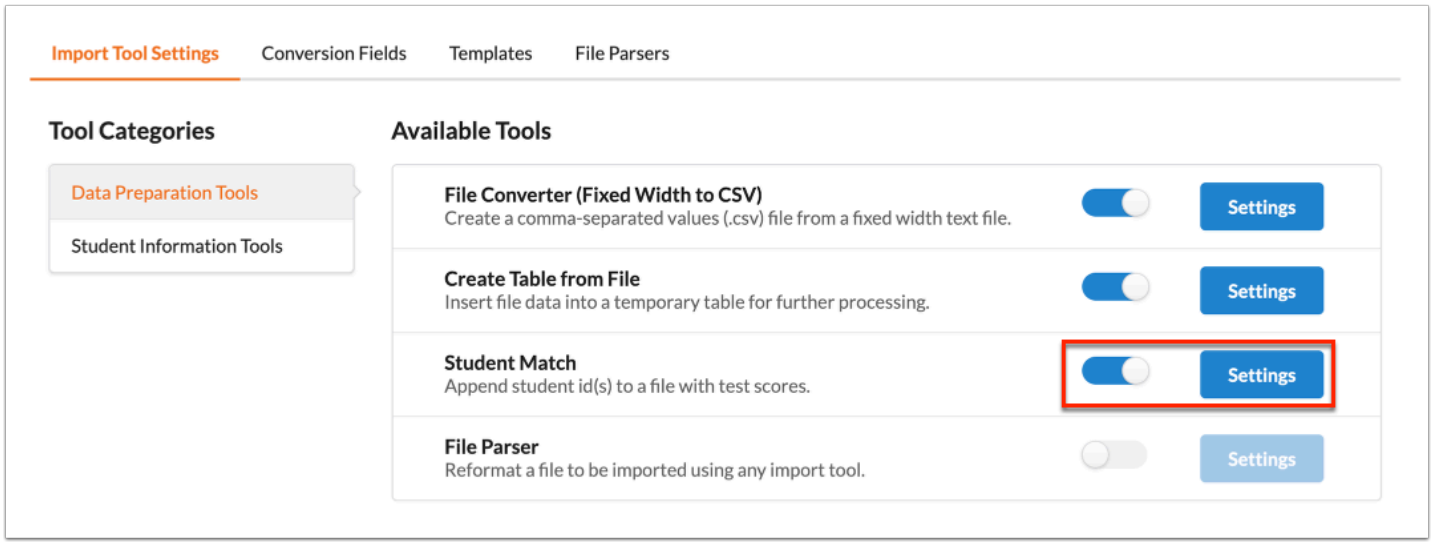


ii. Click **Save** to apply changes.

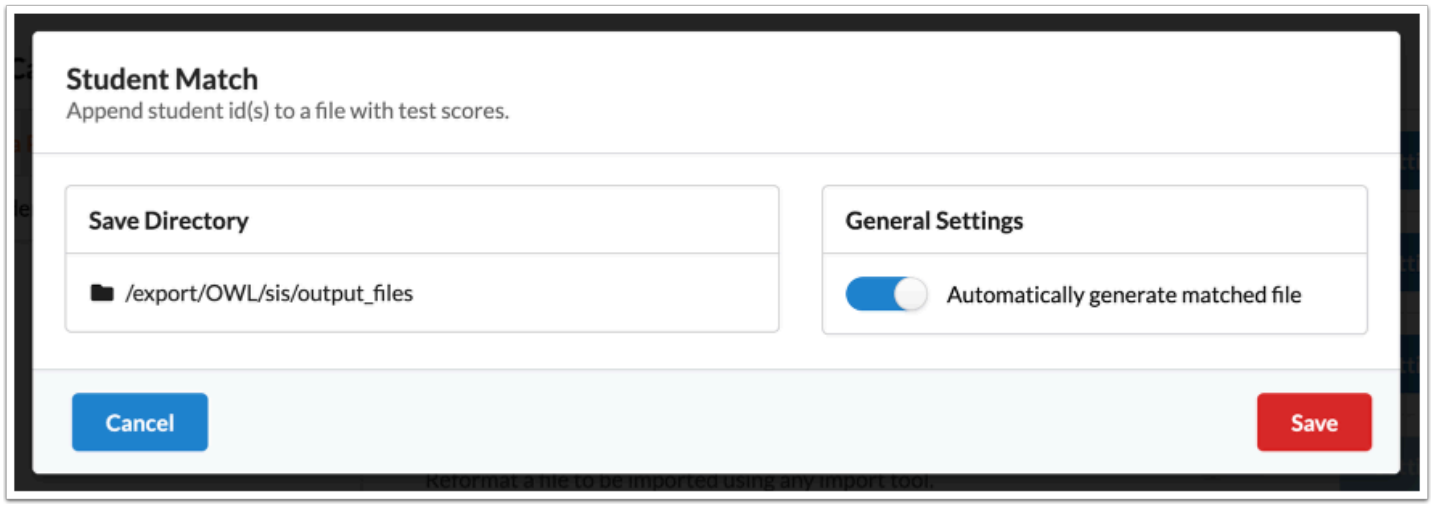
4. Click the toggle to enable the **Student Match** setting to append student IDs to a file with test scores.

> See Student Match Files and Import Tools: Student Match for more details on this process once set up is complete.

a. Click **Settings** to view information about the directory and enable general settings.



i. In the Student Match pop-up window, review the Save Directory and click the **Automatically generate matched file** toggle to automatically generate a matched student file.

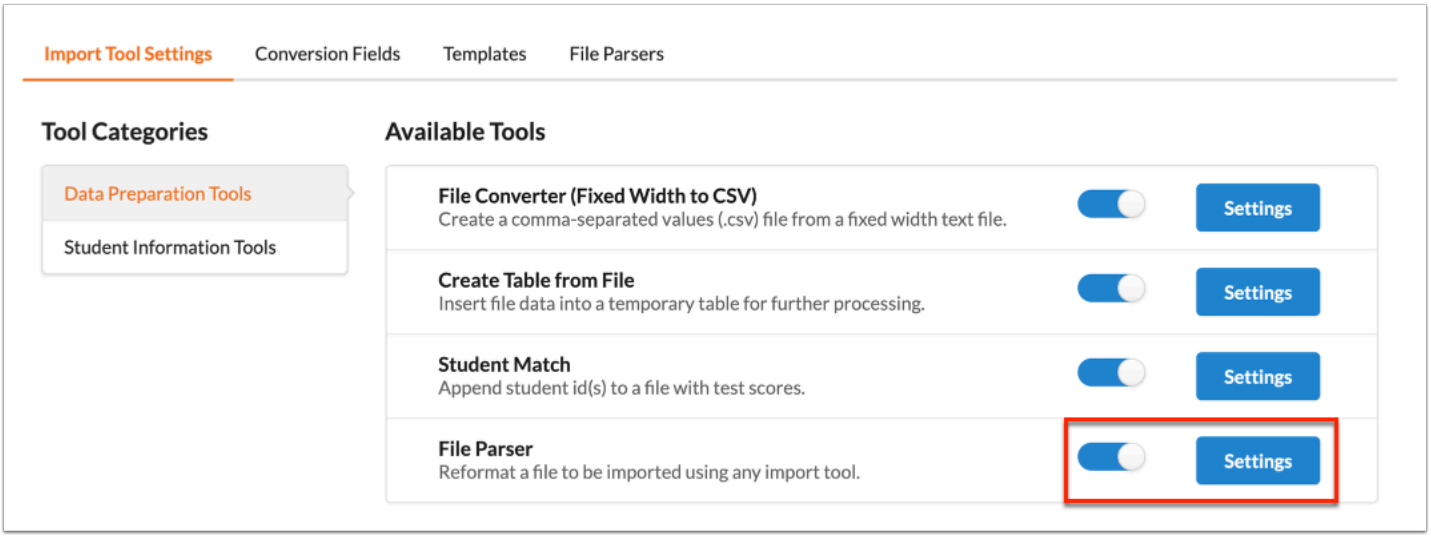


ii. Click **Save** to apply changes.

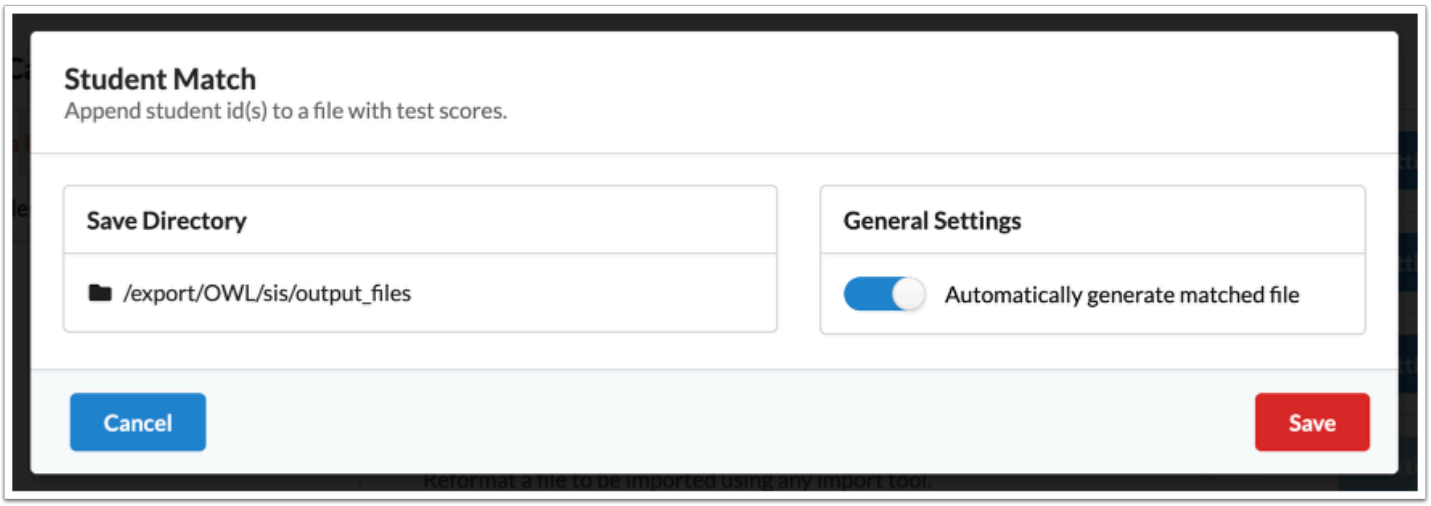
5. Click the toggle to enable the **File Parser** setting to reformat files to be imported using any import tool.

See Import Tools: Import File for more details on this feature once set up is complete.

a. Click **Settings** to view information about the directory and enable general settings.



i. In the File Parser pop-up window, review the Save Directory and click the **Automatically generate parsed file** toggle to automatically generate a parsed file.

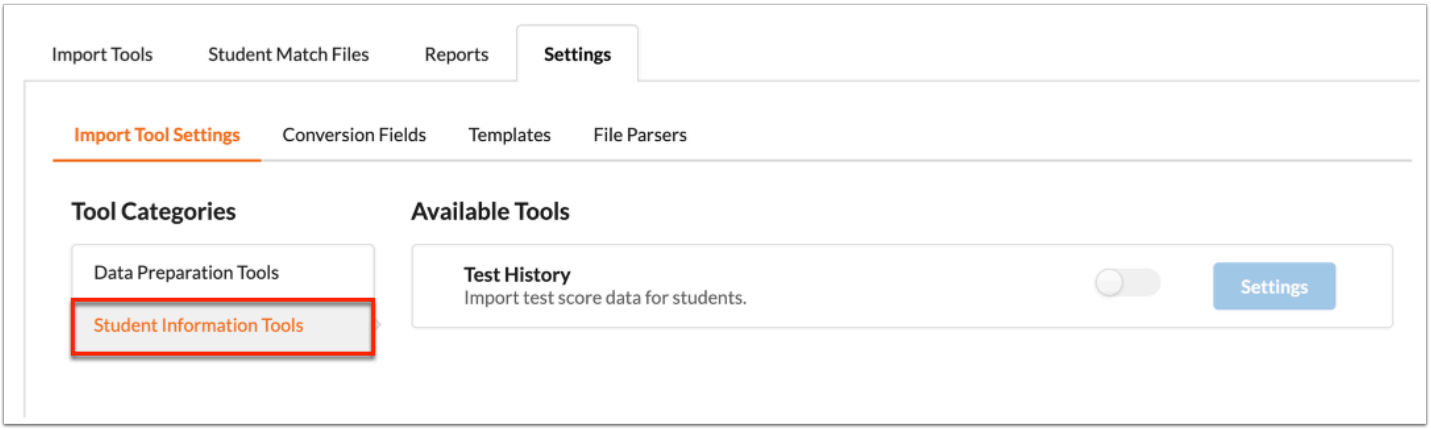


ii. Click **Save** to apply changes.

Student Information Tools

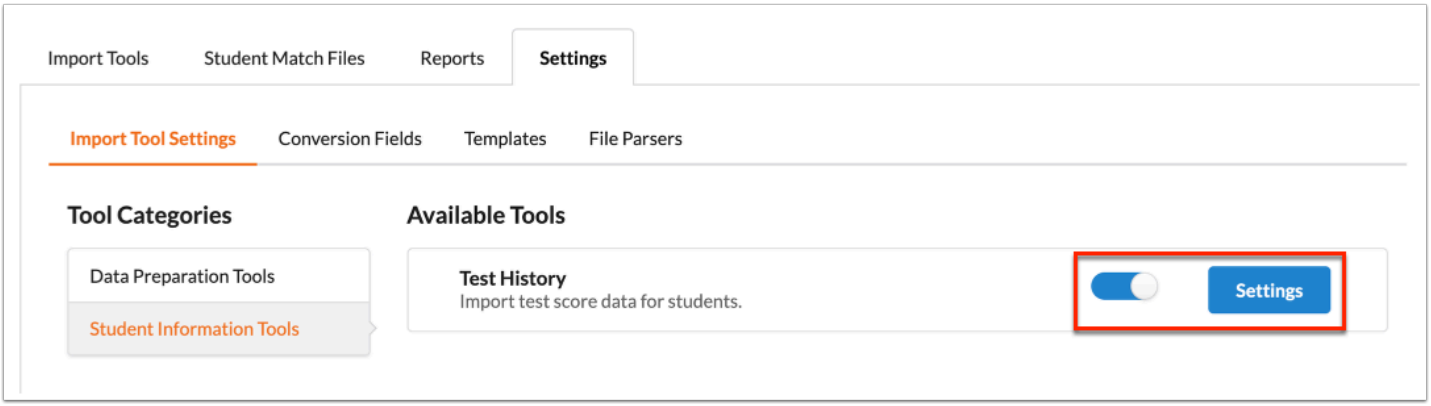
See Test History and Import Tools: Import File for detailed information about the process once set up is complete.

1. Click the **Student Information Tools** category to edit settings for test history.

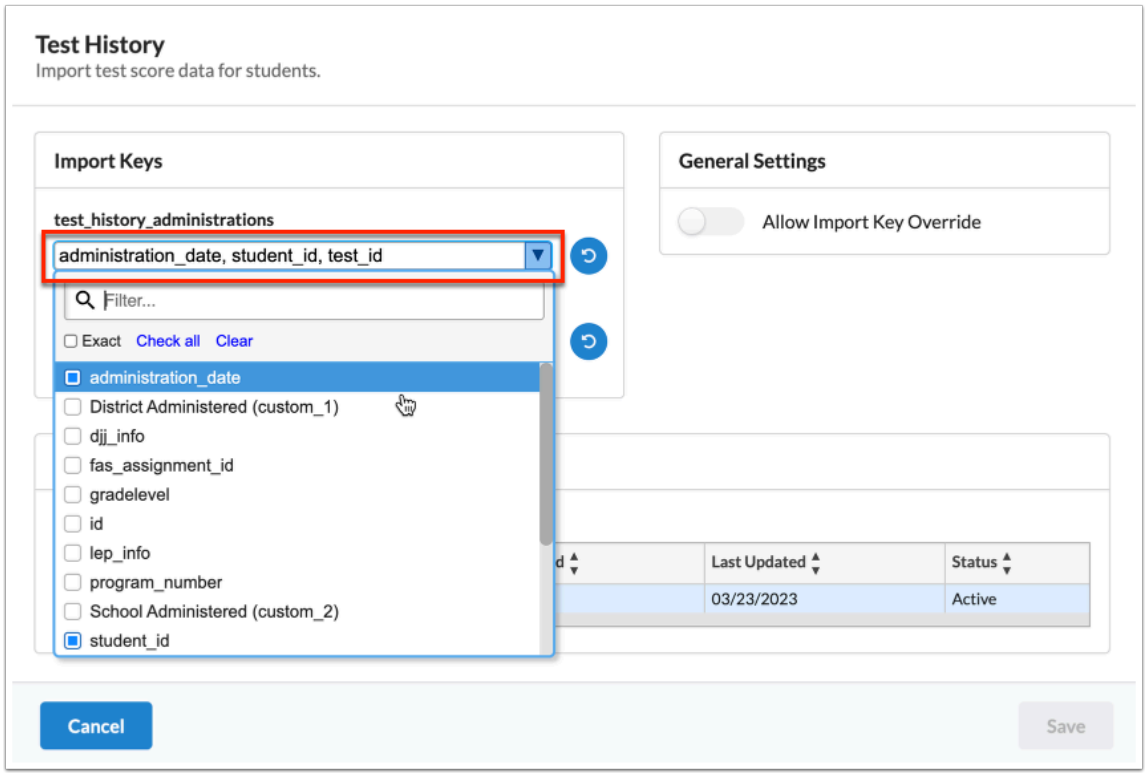


2. Click the toggle to enable the **Test History** setting to import test scores data for students.

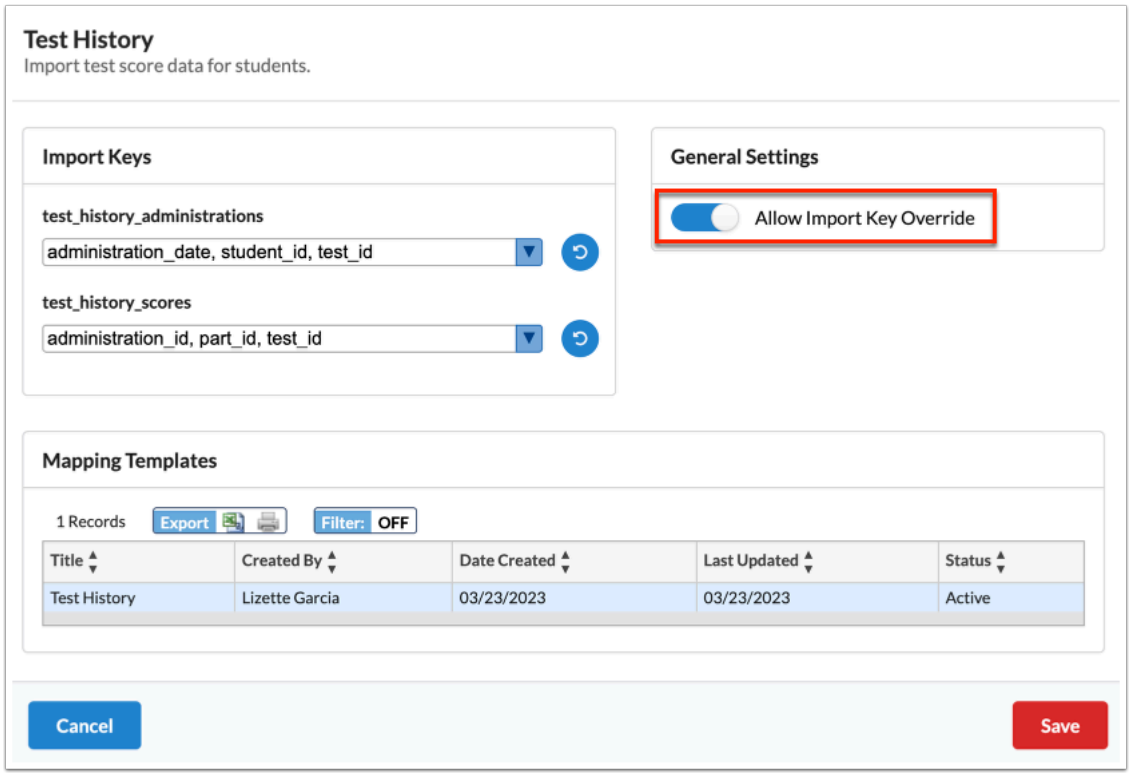
a. Click **Settings** to review and edit import keys, enable general settings, and review mapping templates.



i. Select the **Import Keys** from the provided pull-downs. Select as many import keys as needed.



ii. Click the **Allow Import Key Override** toggle to allow yourself and users to override the selected import keys.



If any Mapping Templates have been saved, thet are displayed in the corresponding section including the Title, Created By, Date Created, Last Updated, and Status.

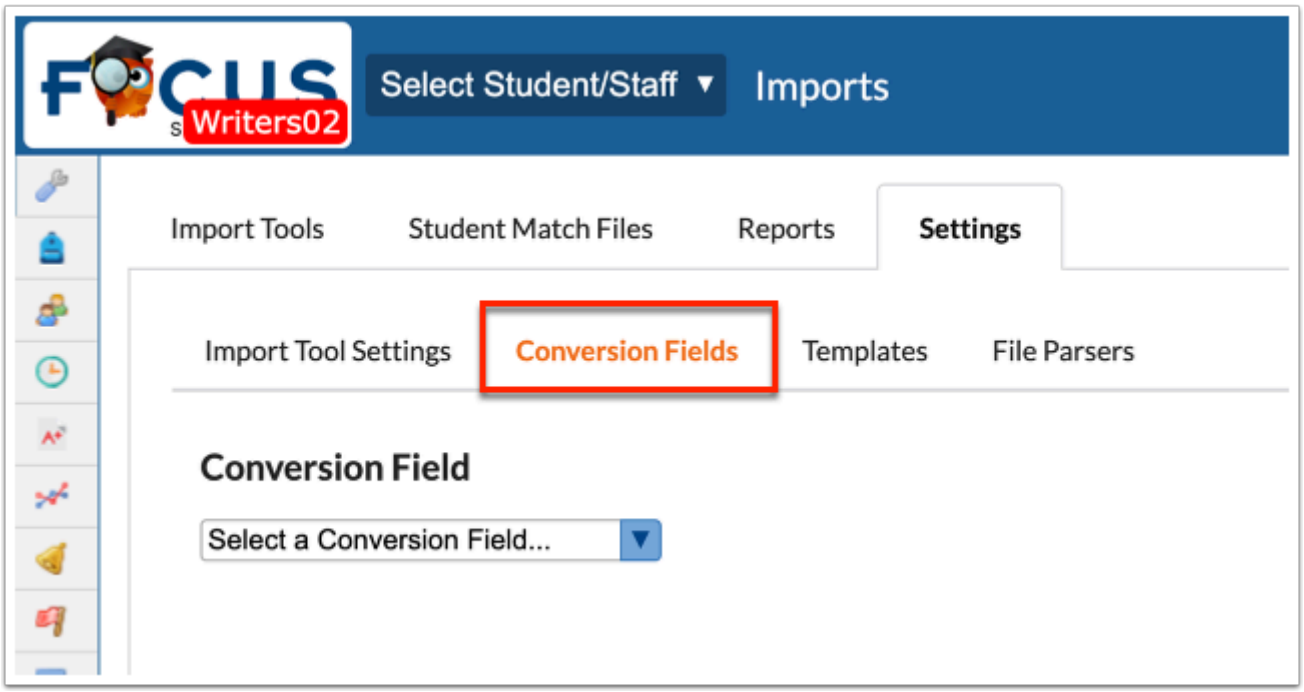
iii. Click **Save** to apply changes.

Conversion Fields

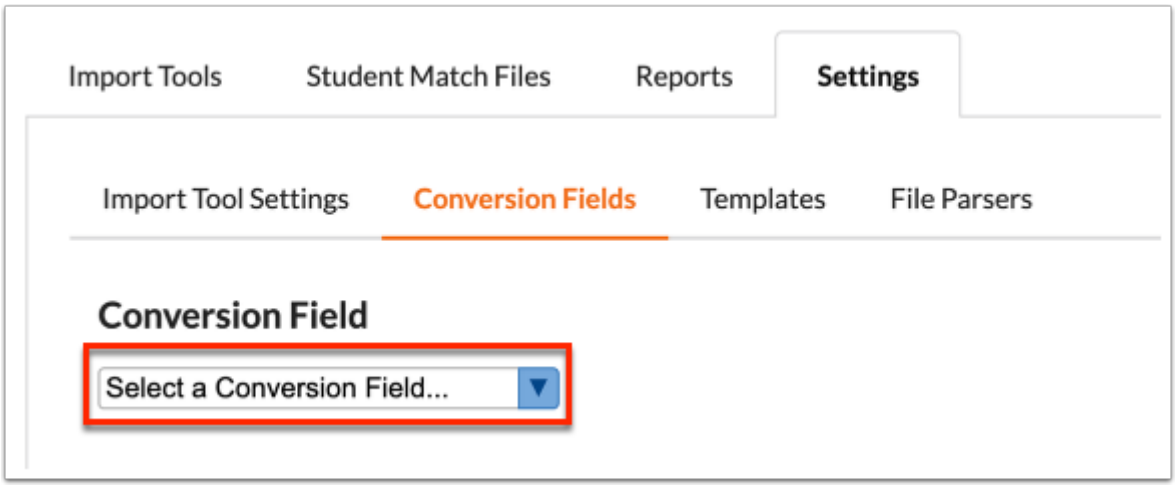
Conversion Fields determine how the import process converts a value, such as the part_id: ENG to a value Focus can understand and place, such as 237. Therefore, if subject_code is selected as the default conversion field for part_id, Focus will know to convert the subject code into the part ID.

The Conversion Fields tab allows users to determine the Identifier Column, Key Conversion Fields, the Import Tools for which the conversion applies, and whether the selections should act as a default.

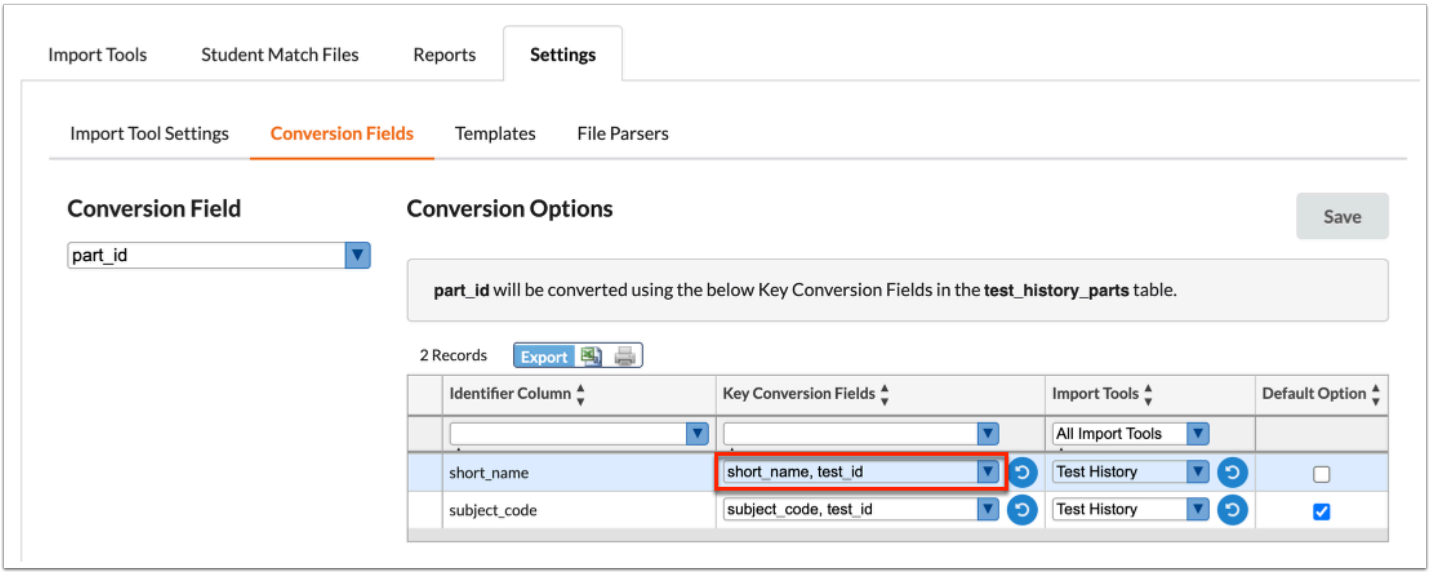
1. Click the **Conversion Fields** tab.



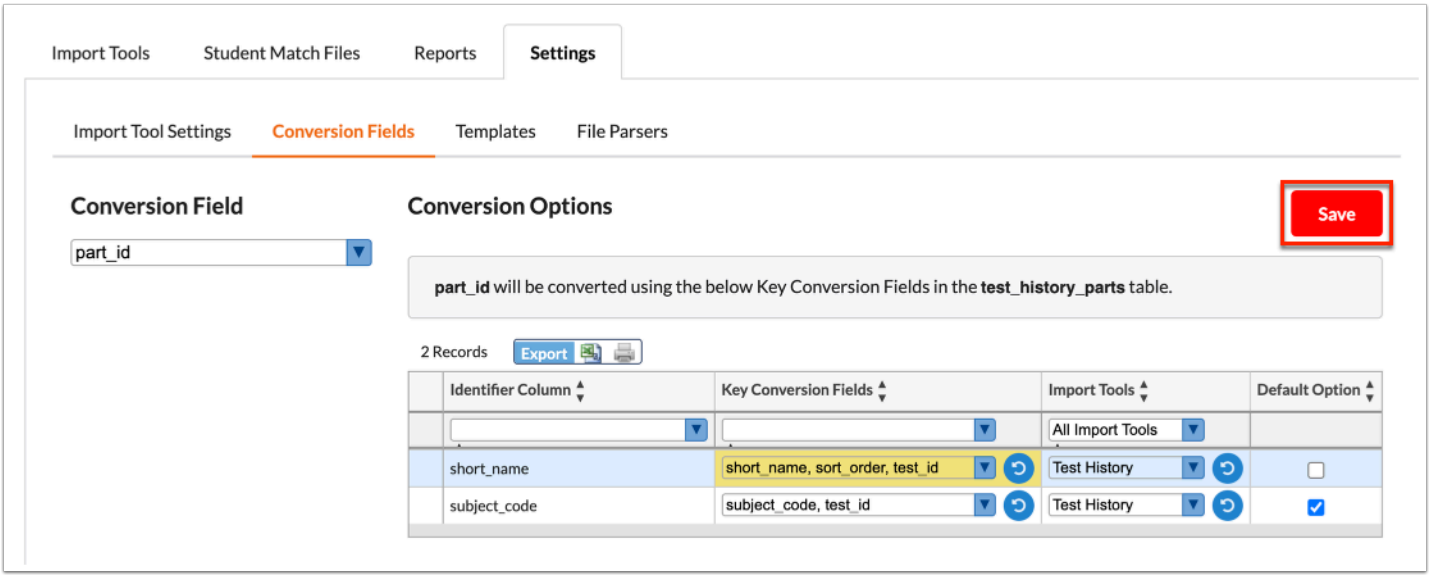
2. Select the **Conversion Field** from the provided pull-down



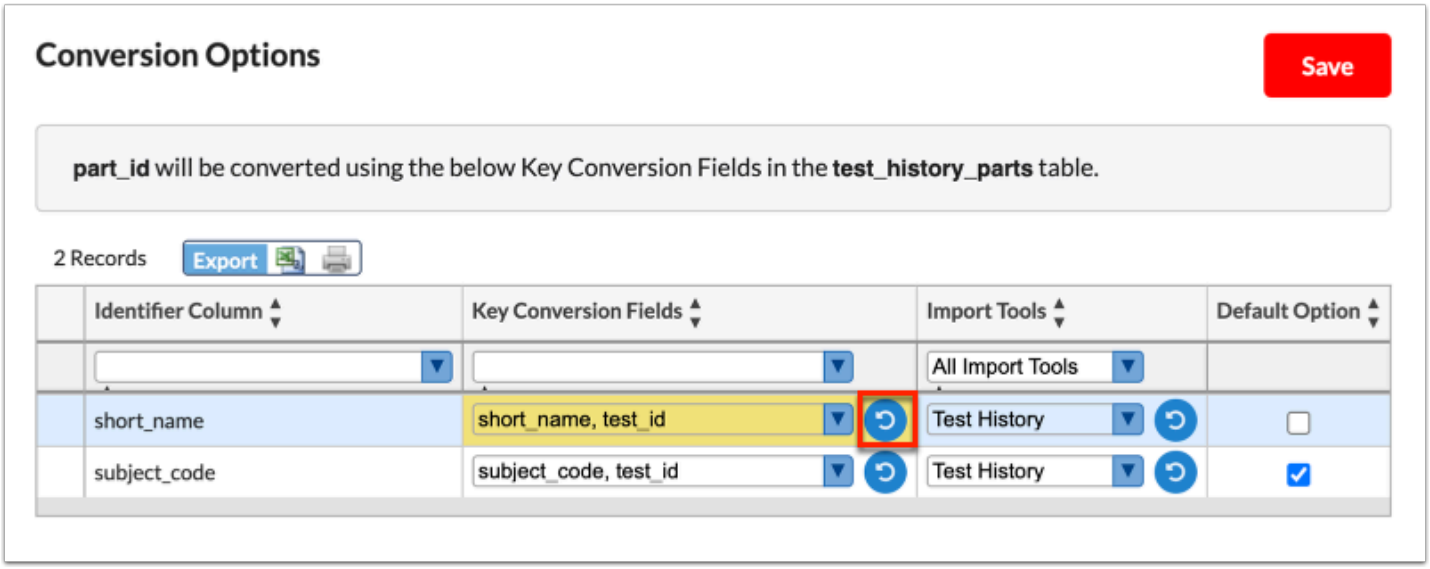
3. Click the **Key Conversion Fields** pull-down to change the selections made for existing conversions.



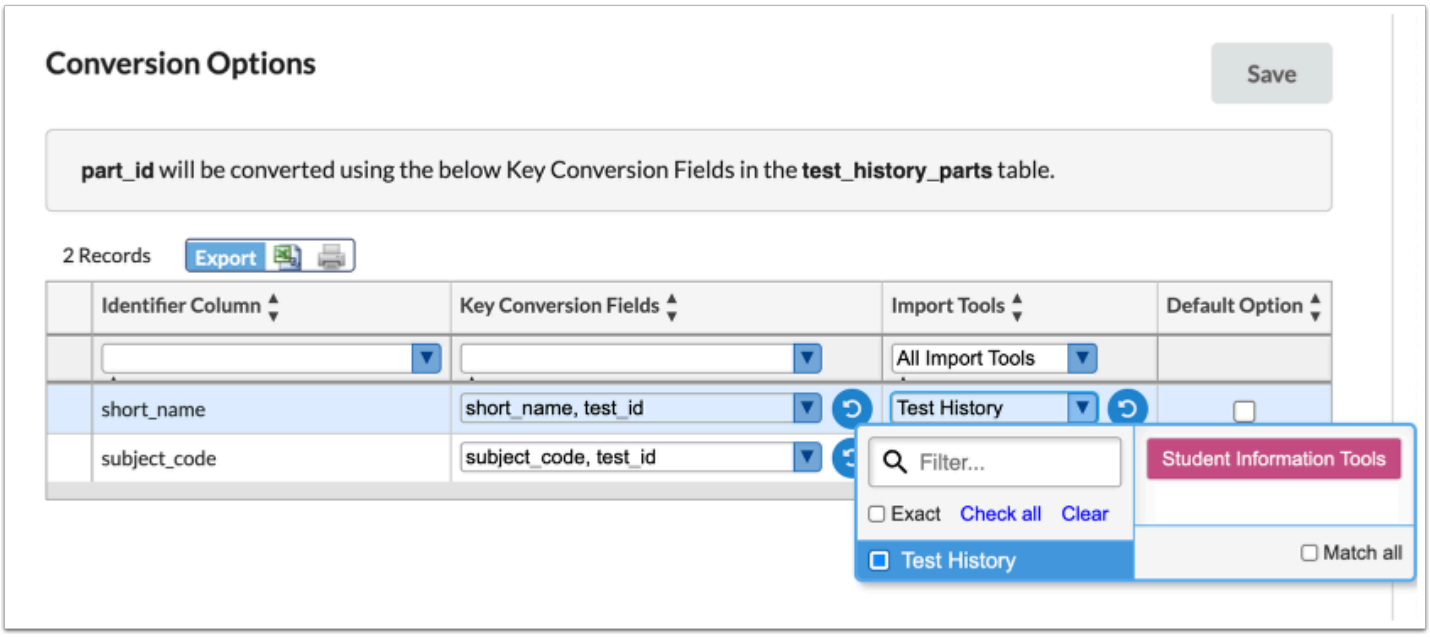
a. Once a change has been conducted, click **Save** to apply changes.



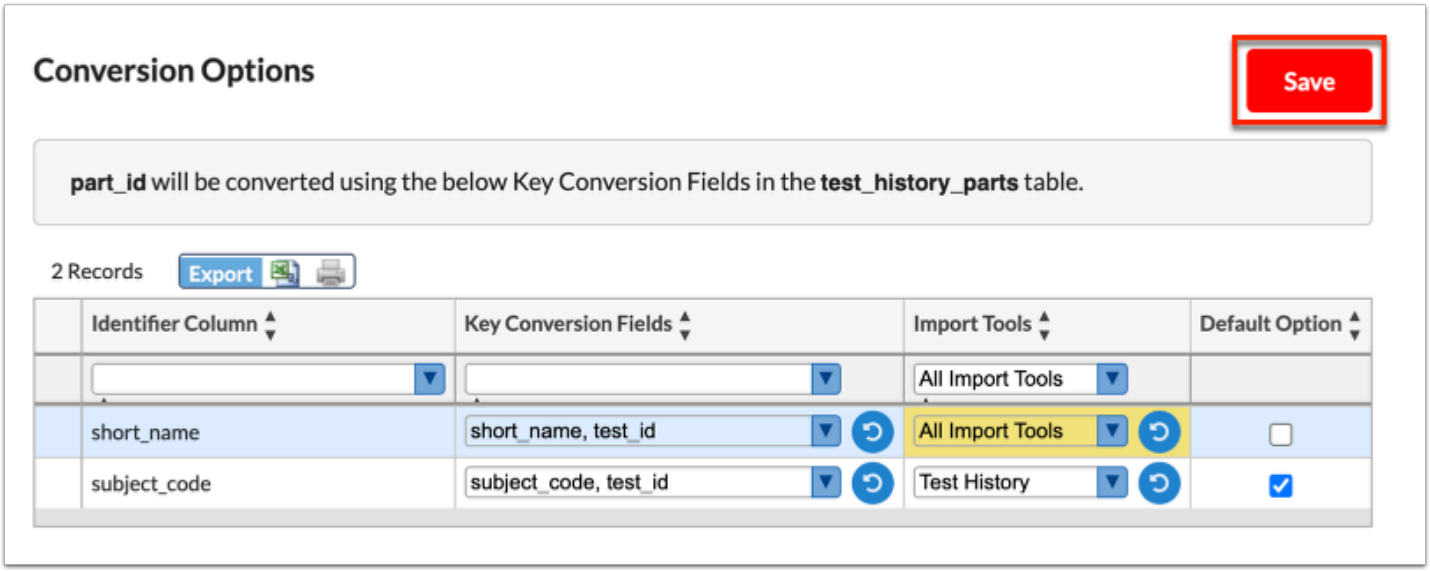
To revert back to Focus default selections, click the circular arrow.



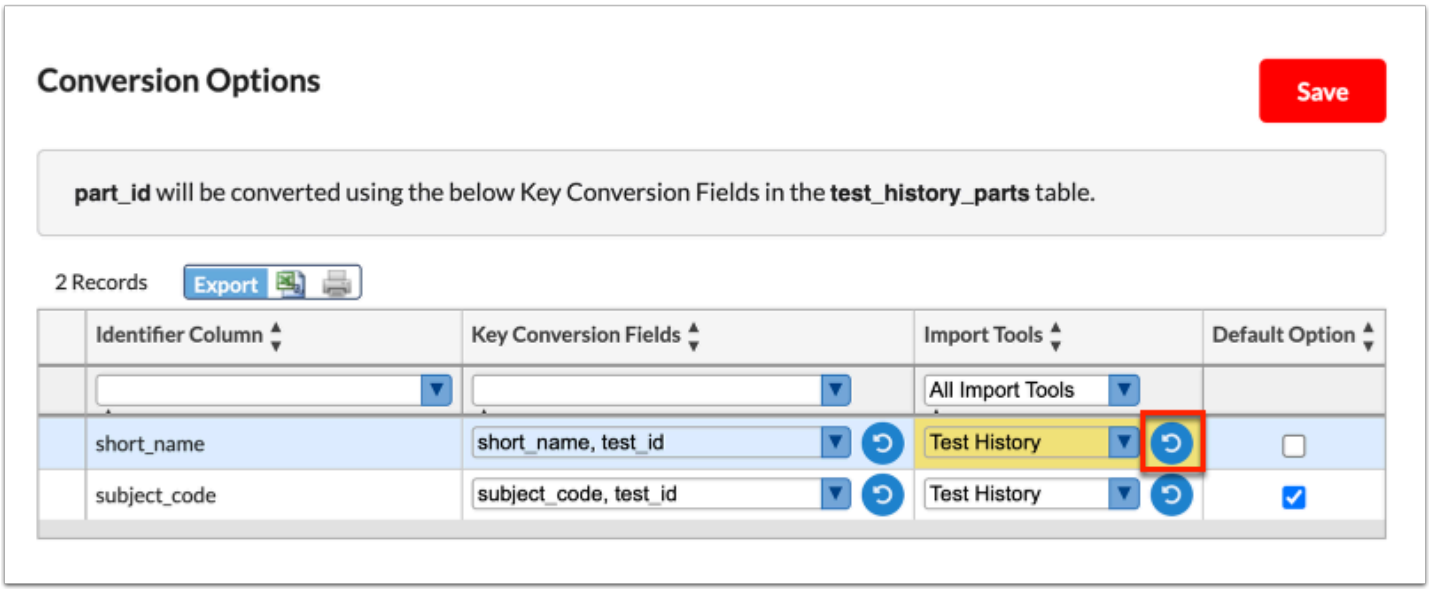
4. Click the **Import Tools** pull-down to change the selections made for existing conversions.



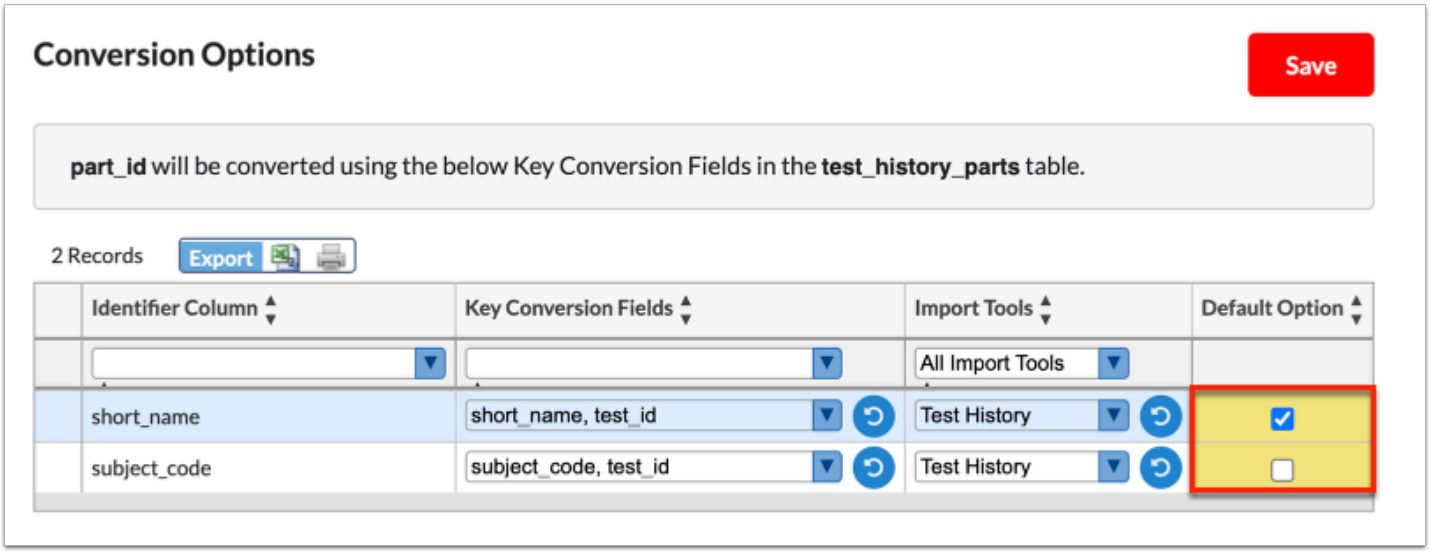
a. Once a change has been conducted, click **Save** to apply changes.



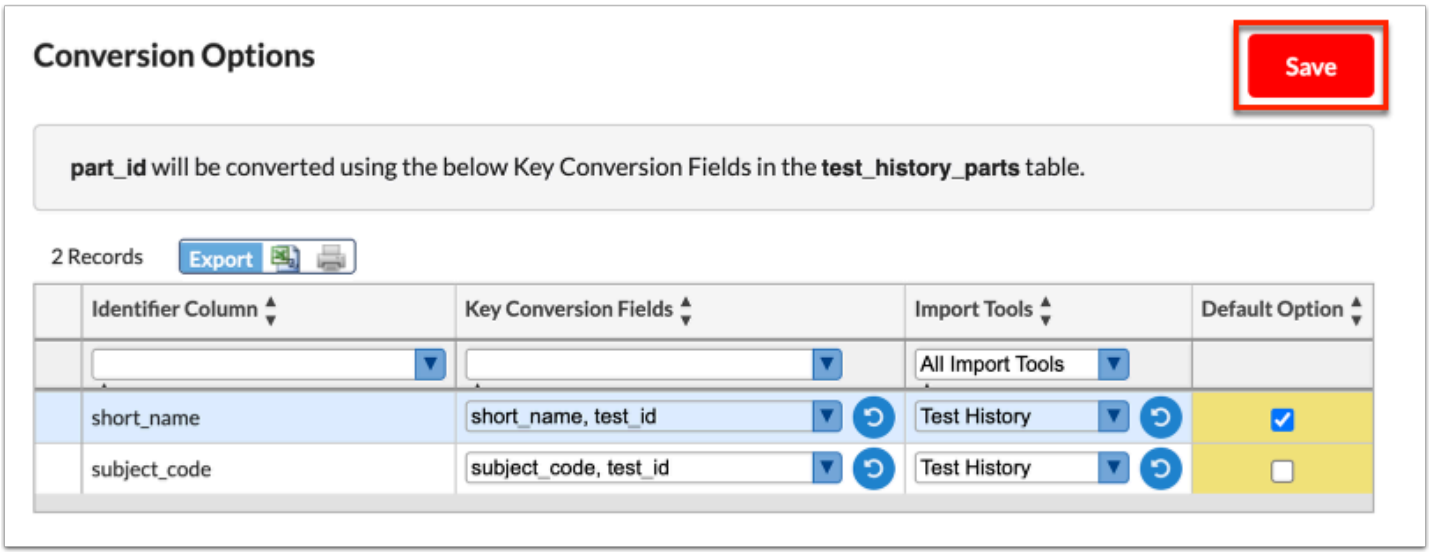
To revert back to Focus default selections, click the circular arrow.



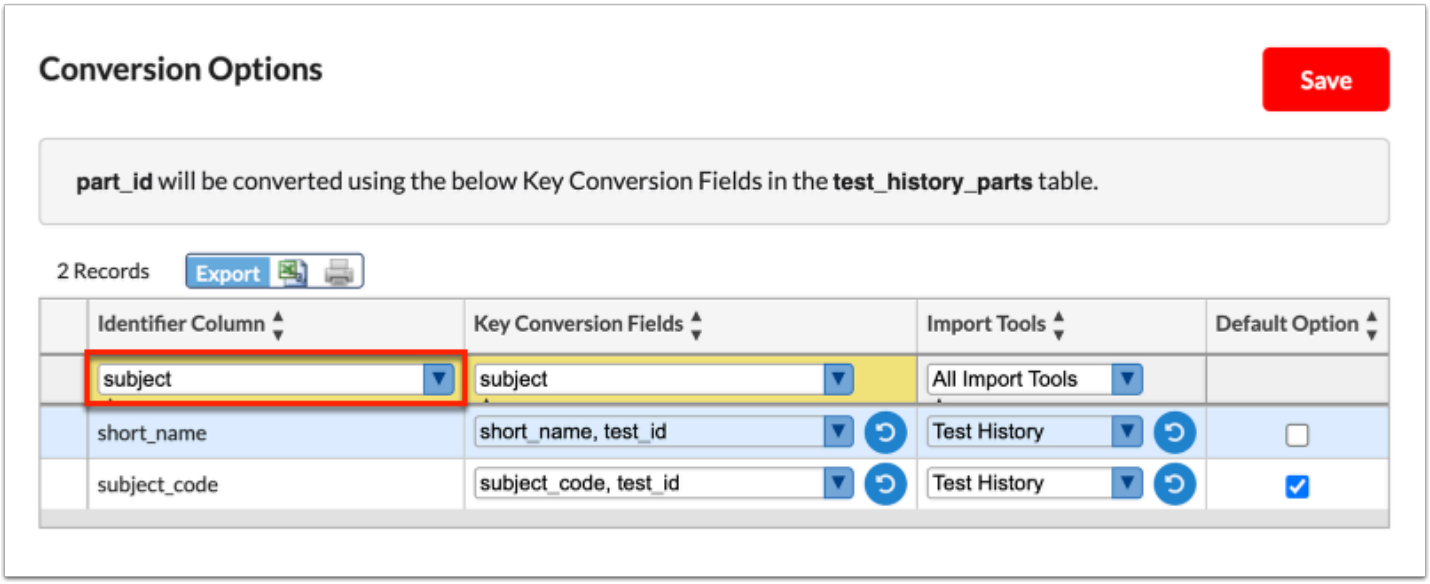
5. Select the **Default Option** check box to make the conversion the default. Note: When you select the check box for one conversion, the other option(s) are automatically cleared (unselected). Only one conversion can be set as a default.



a. Click **Save** to apply changes.

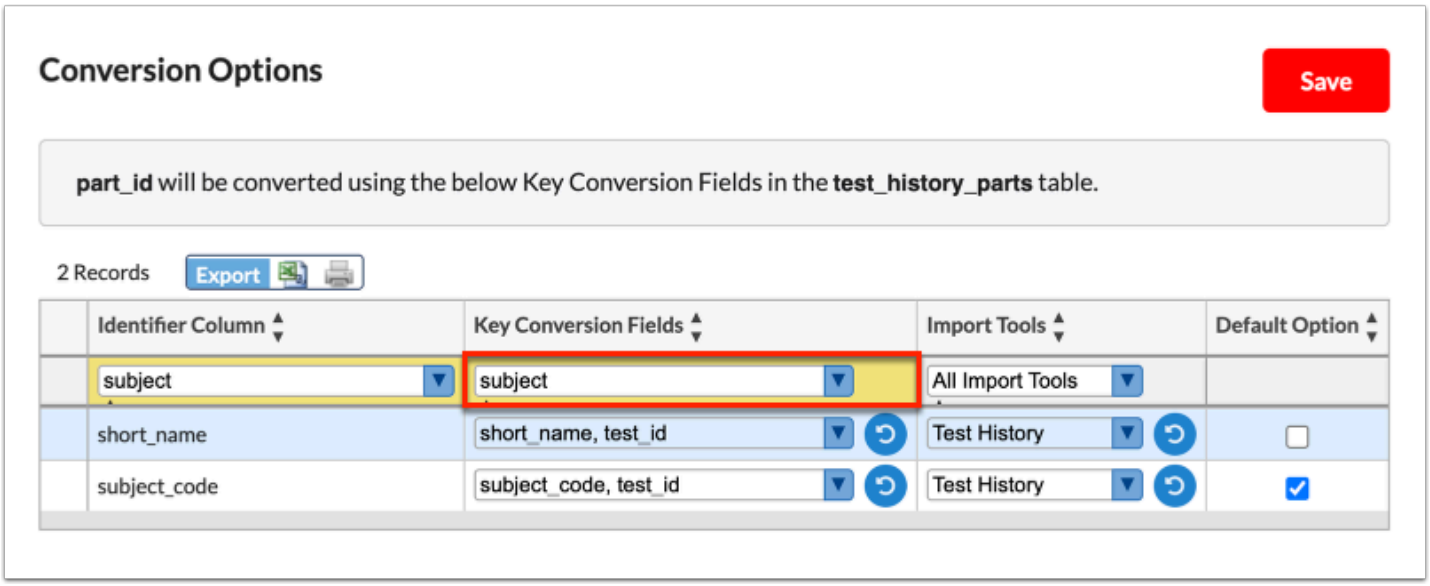


6. To add a new conversion, select the **Identifier Column** from the pull-down.

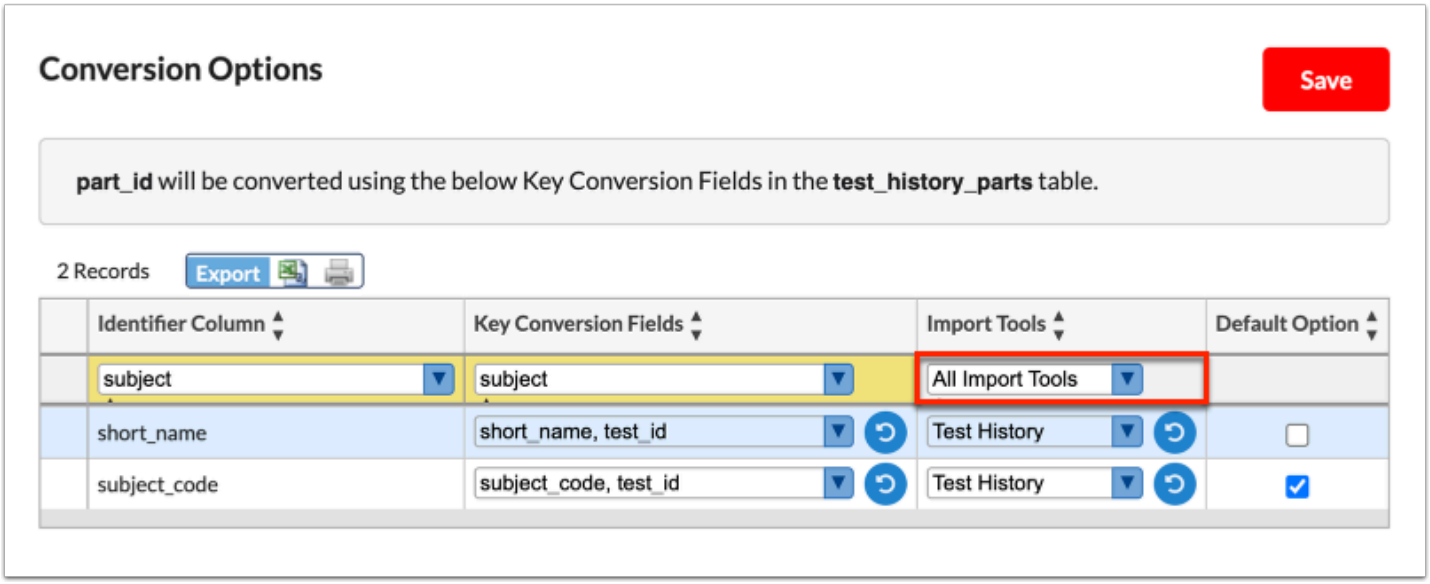


Every conversion option needs to at least include the **Identifier Column** as part of the key conversion.

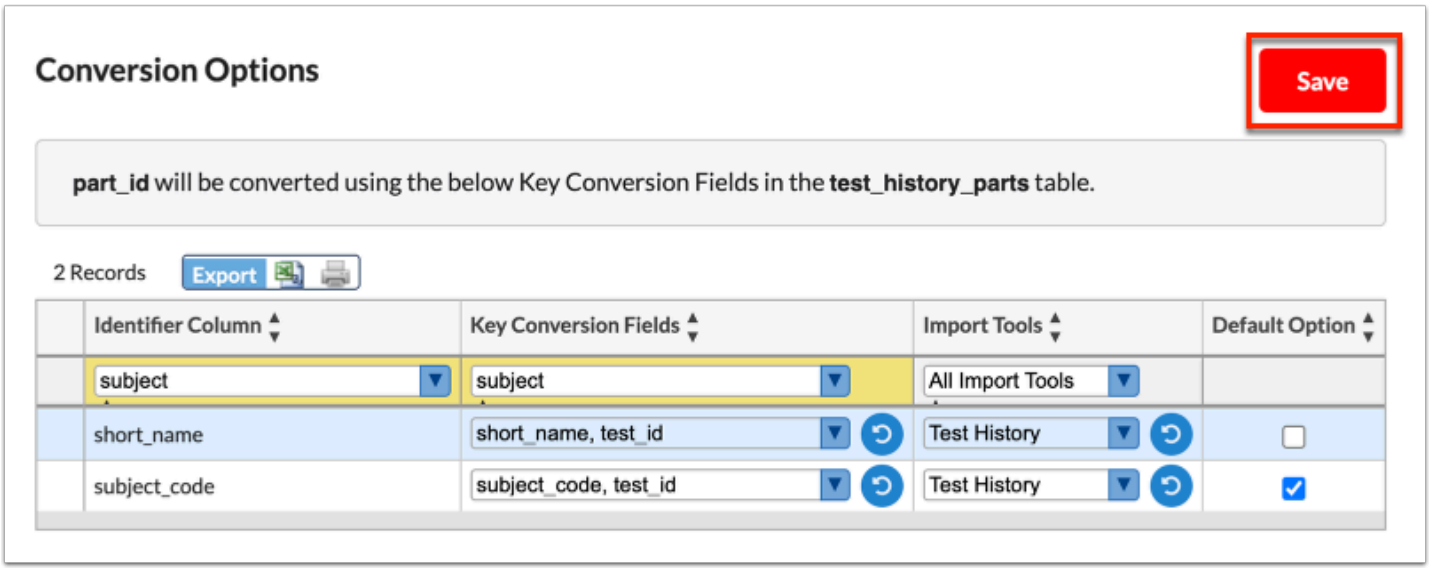
7. Select the applicable **Key Conversion Fields** from the pull-down.



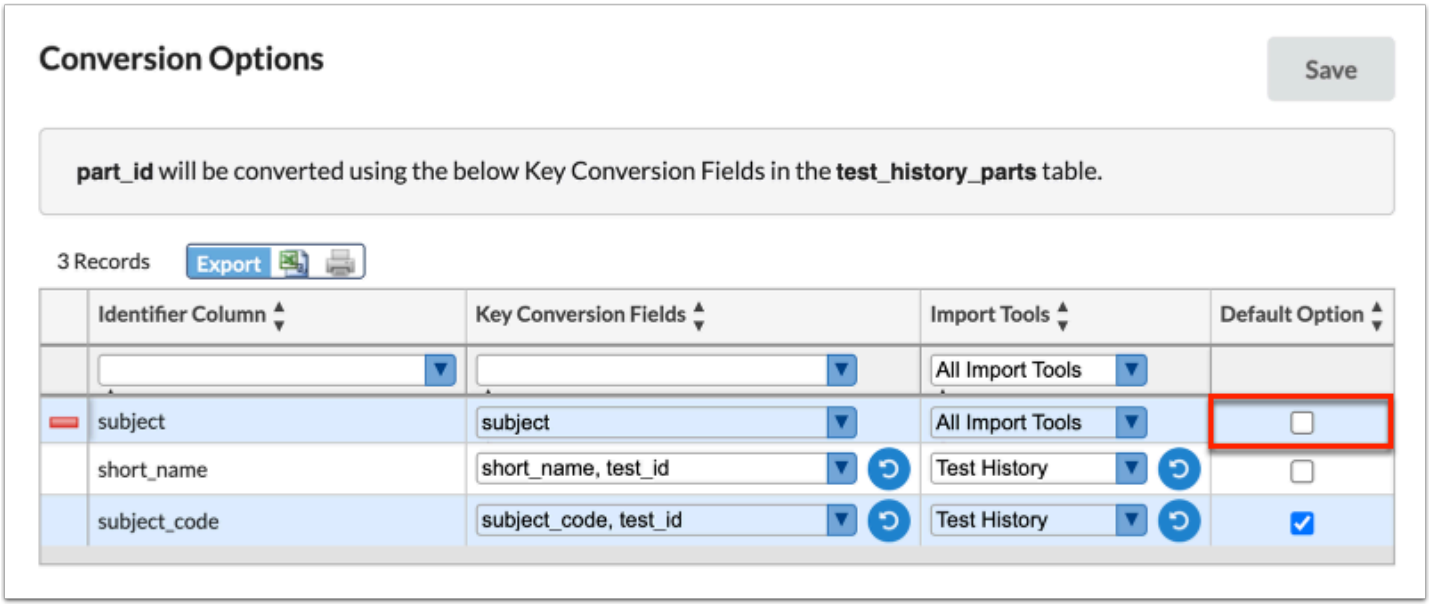
8. Select the applicable **Import Tools** from the pull-down.



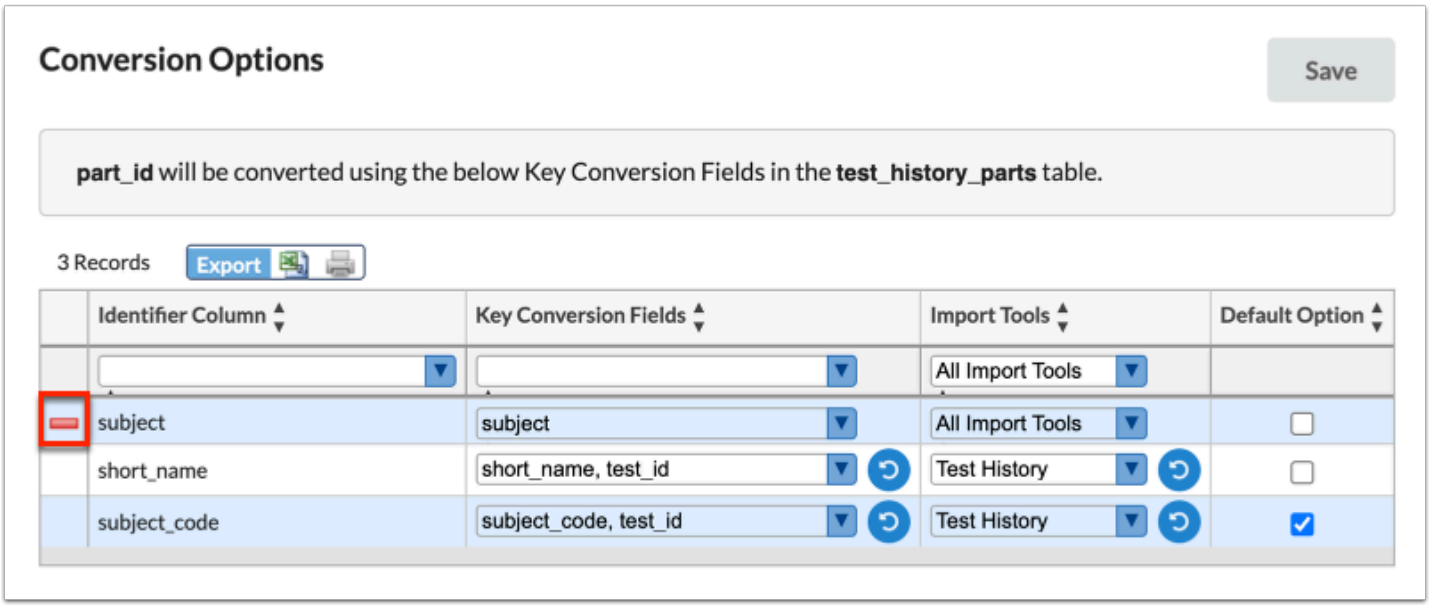
9. Press the **Enter** key to save the conversion or click **Save**.



10. Select the **Default Option** check box to make the conversion the default.

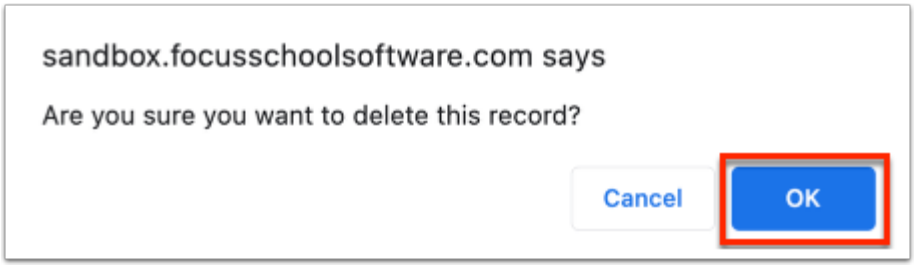


11. Click the **delete** button to delete the conversion.

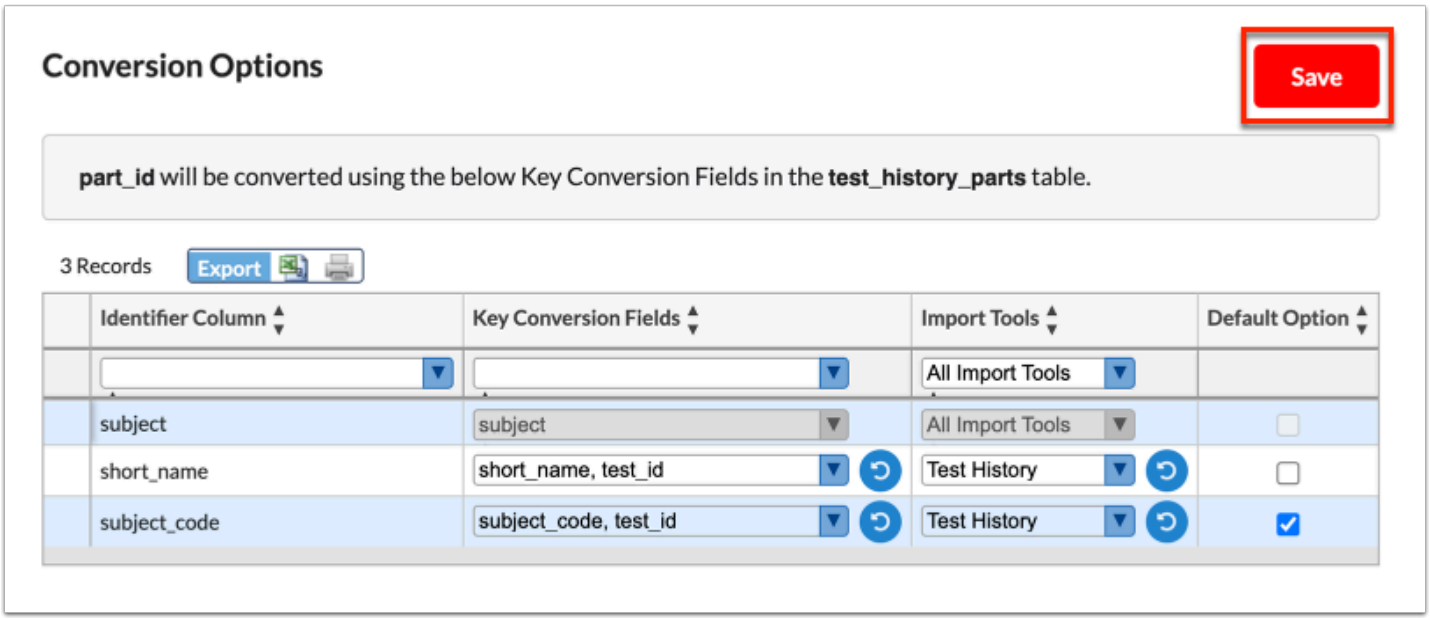


The built-in Focus conversions cannot be deleted, but manually added conversions can be deleted.

a. In the confirmation pop-up window, click **OK**.



b. Click **Save**.

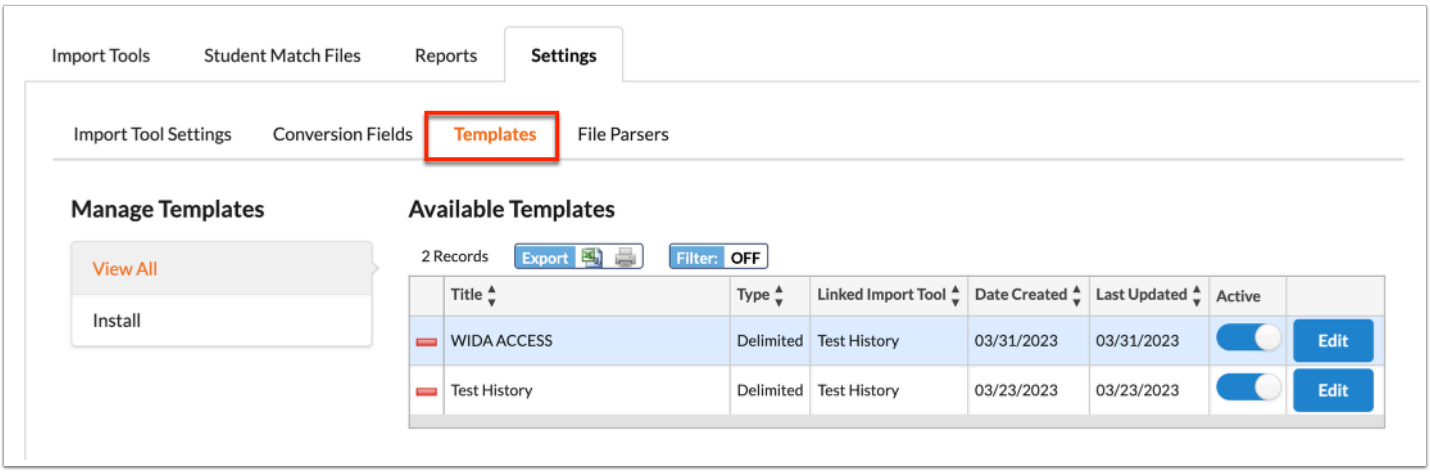


Templates

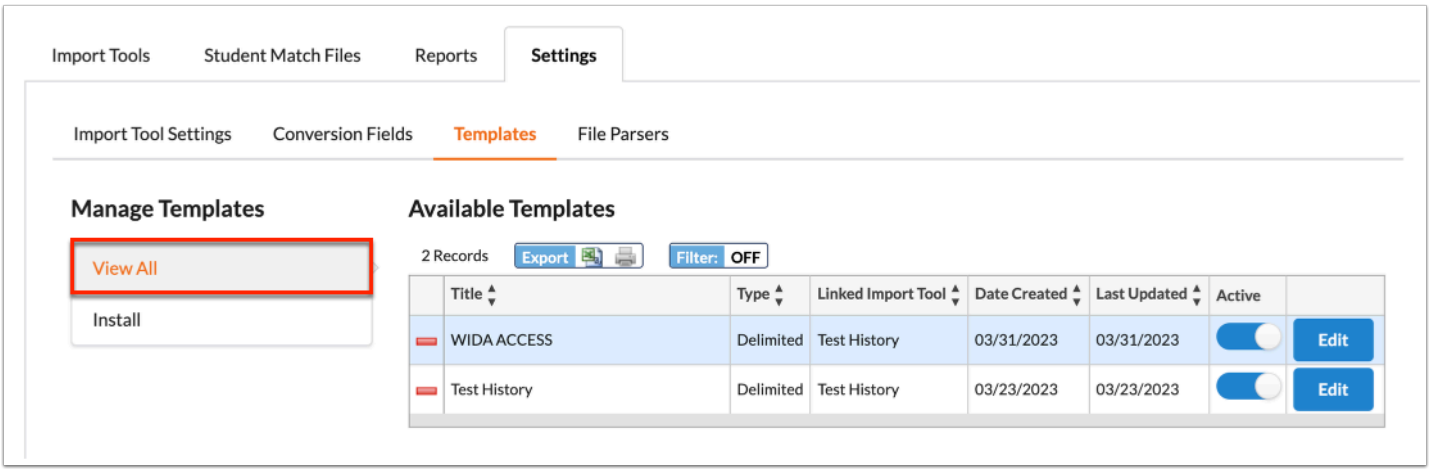
The Templates tab displays existing mapping templates that were created and saved or installed and allows users to edit existing templates or install new templates. Templates are used to automatically map out fields from an uploaded file.

Existing Templates

1. Click the **Templates** tab.

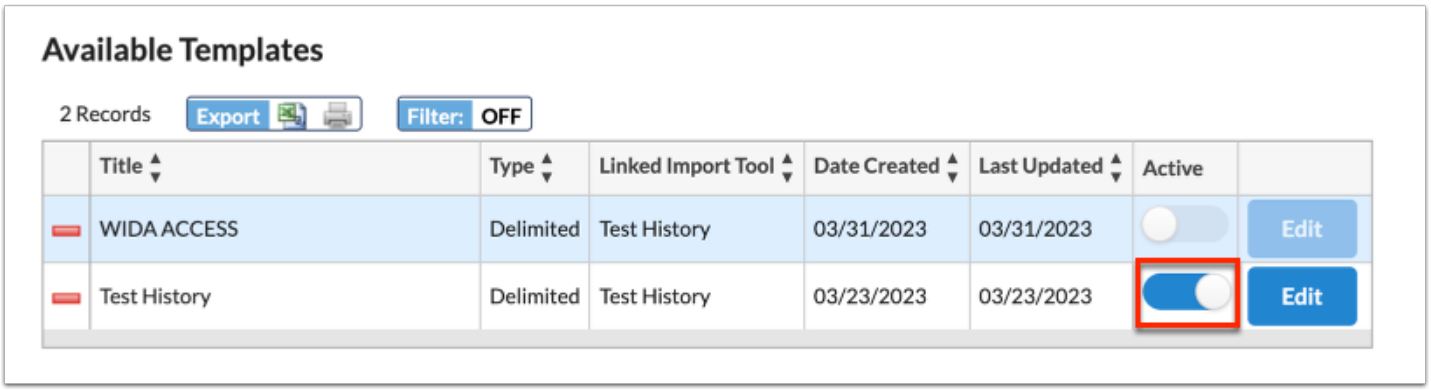


2. The **View All** tab is selected by default, which allows you to view all Available Templates.

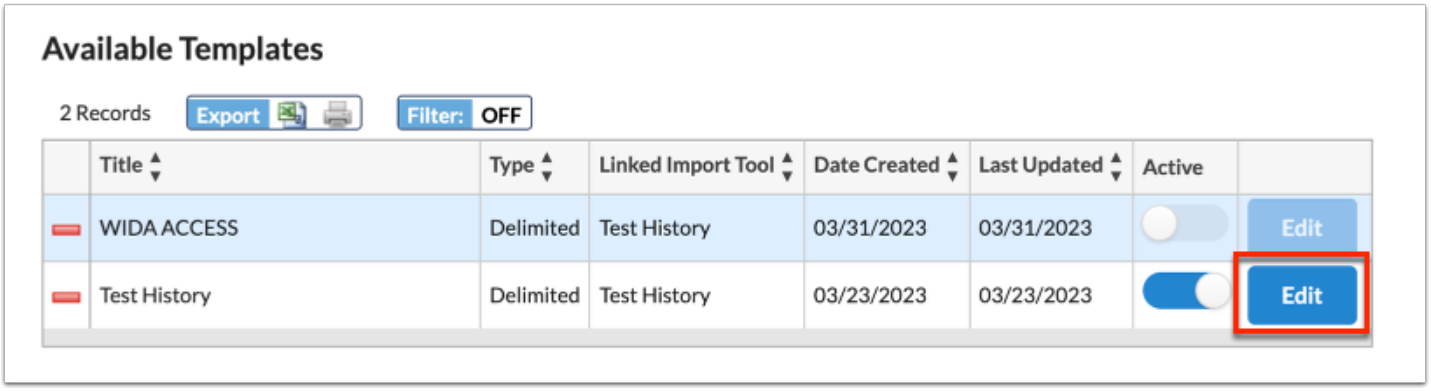


Review the Title, Type, Linked Import Tool, Date Created, Last Updated, and whether the template is Active.

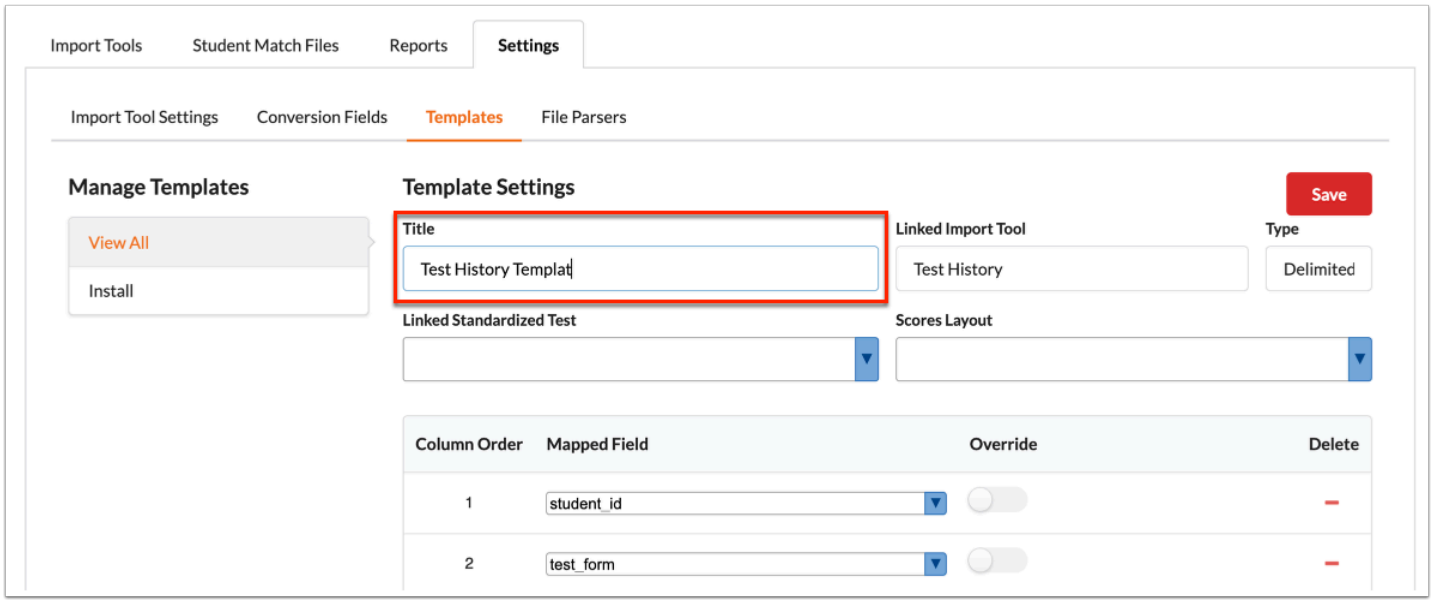
3. If needed, click the **Active** toggle to deactivate the template, which ensures no one can use until it is reactivated. This is a good alternative to deleting templates.



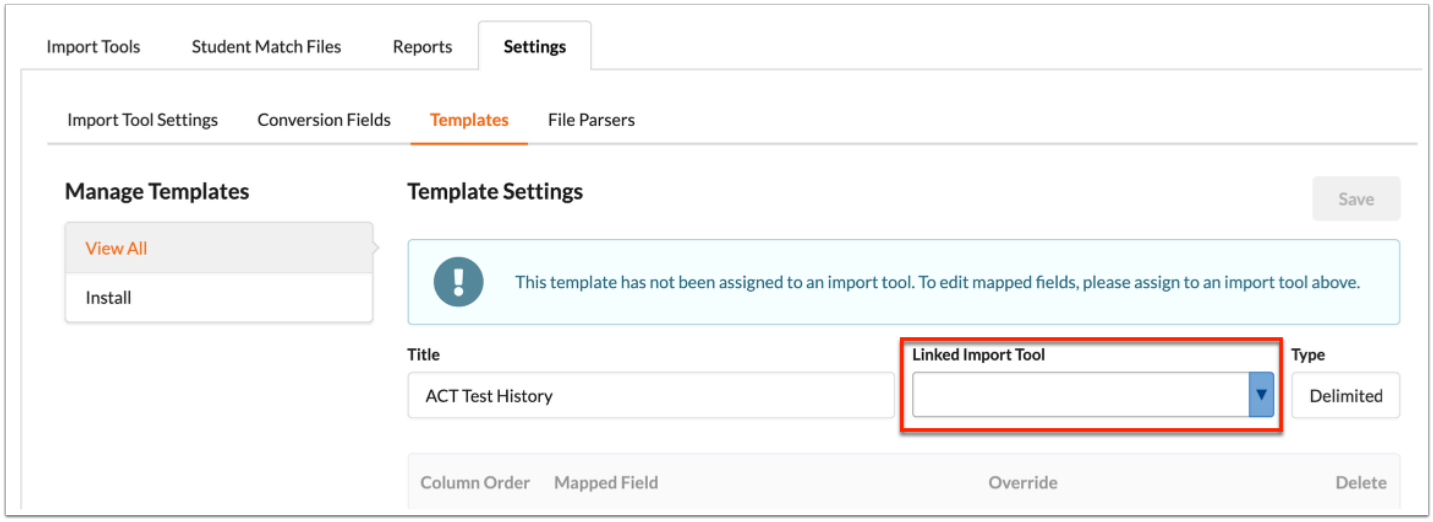
4. Click **Edit** to edit the template including the title, mapped fields, and more.



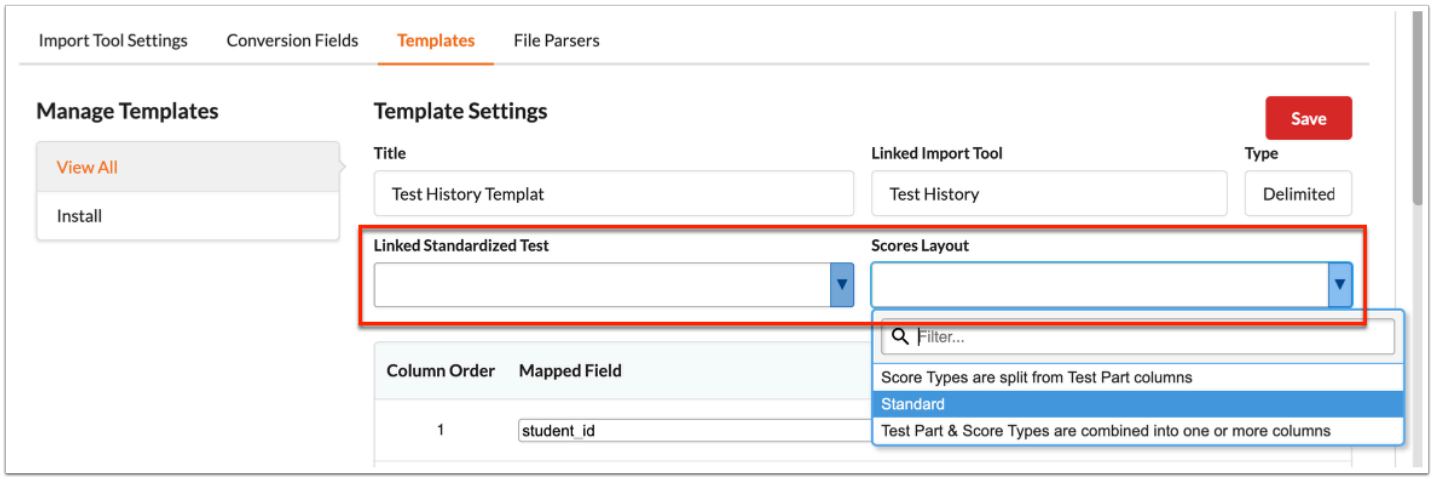
5. Click the **Title** text box to edit the template title.



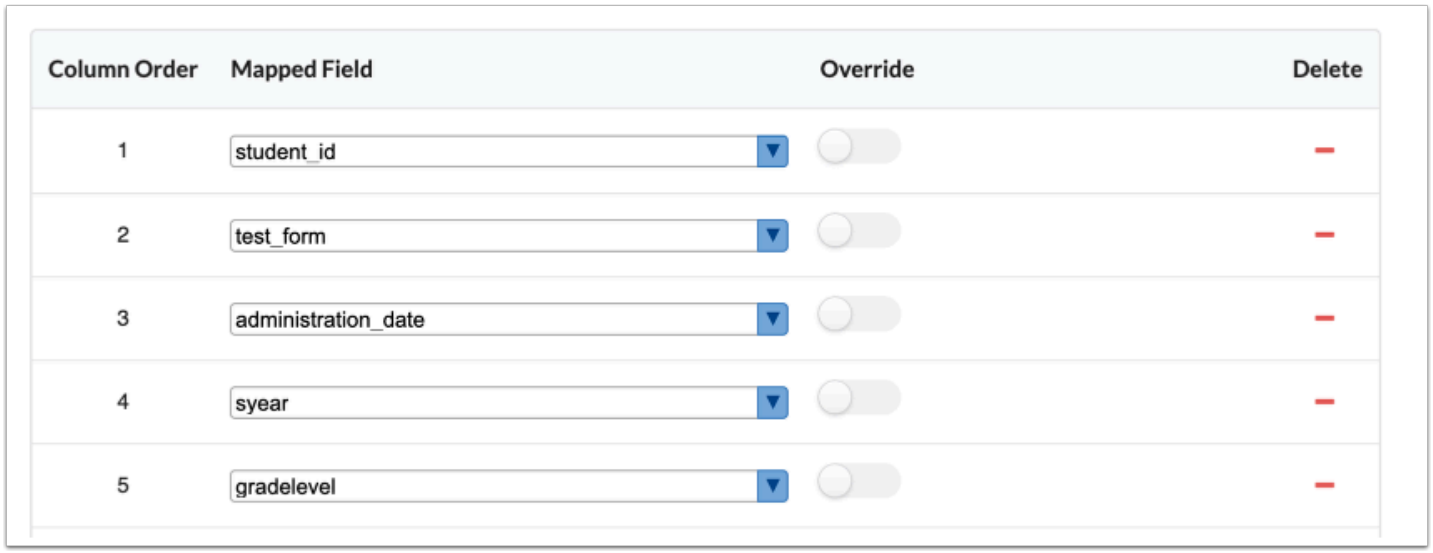
6. You can select a **Linked Import Tool** from the pull-down if one has not already been assigned. For example, if you recently installed a template, it will not have a Linked Import Tool assigned to it.



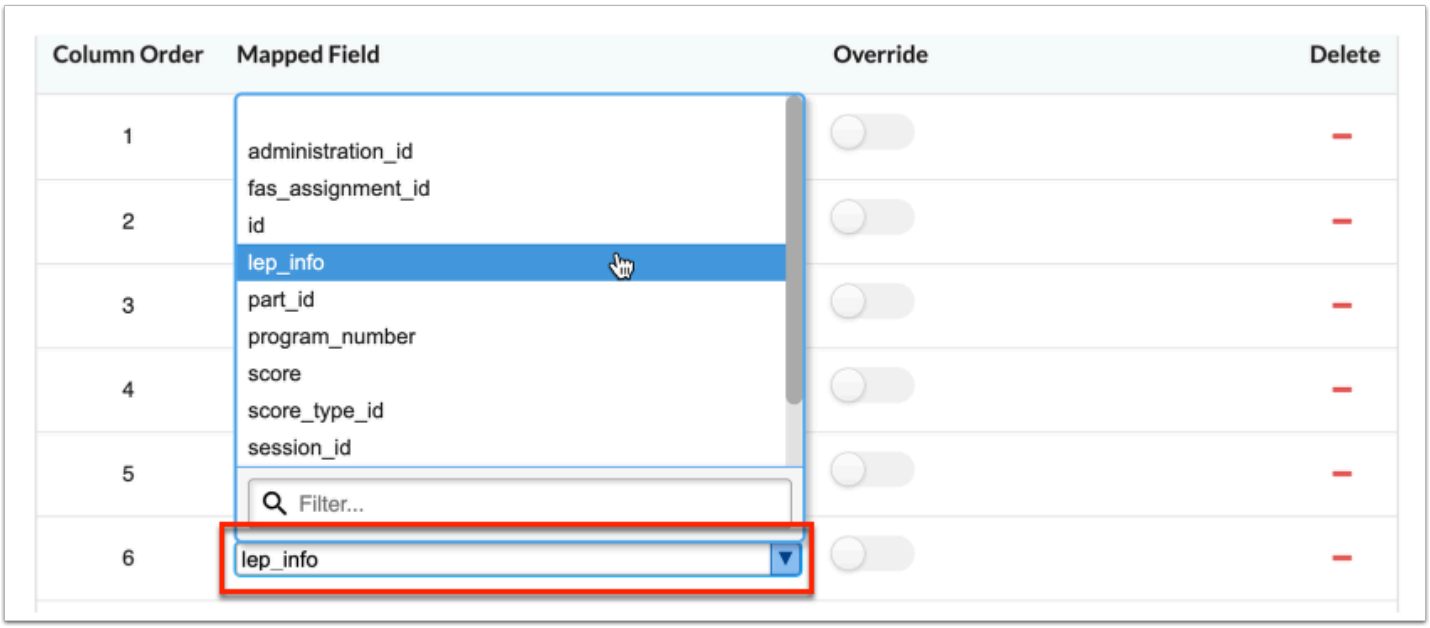
7. Additional pull-downs may display depending in the Linked Import Tool selected upon creating the Template, such as Linked Standardized Test and Scores Layout for the Test History import tool. See Import Tool Requirements for information about each Import Tools and their requirements.



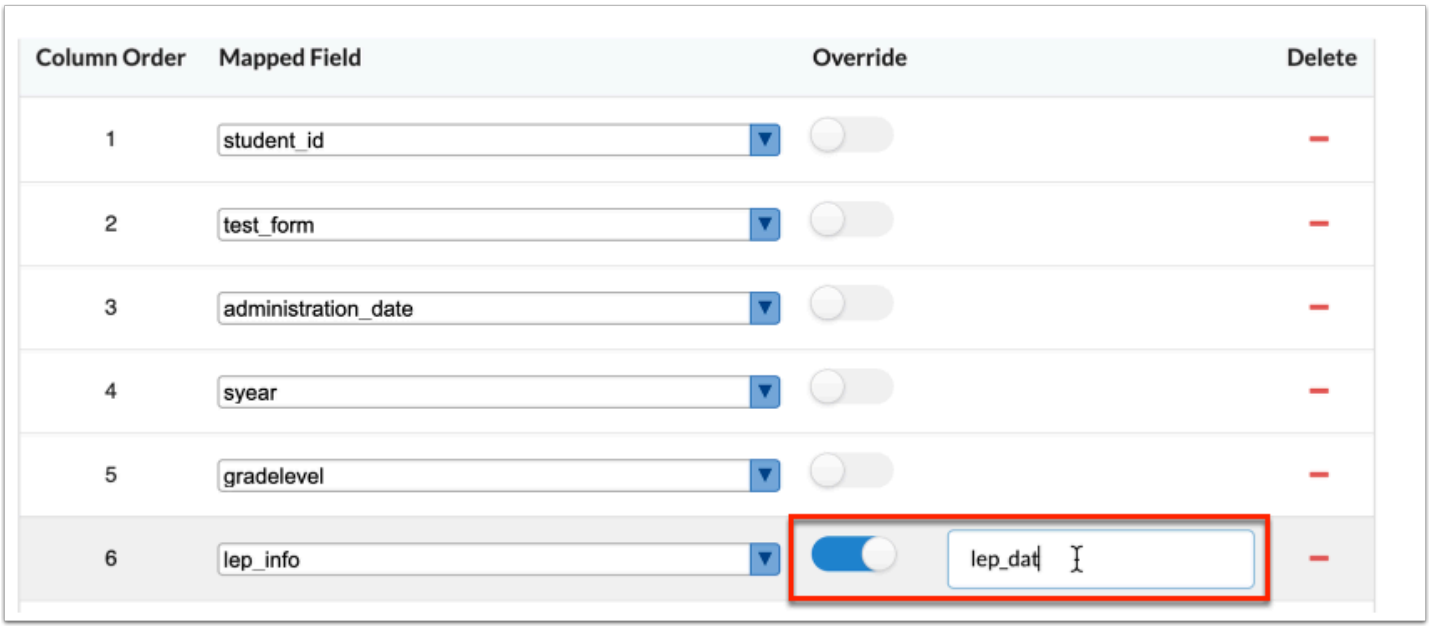
Review the data already mapped including the Column Order to the Mapped Field and users' ability to Override the default mapped field and select their own.



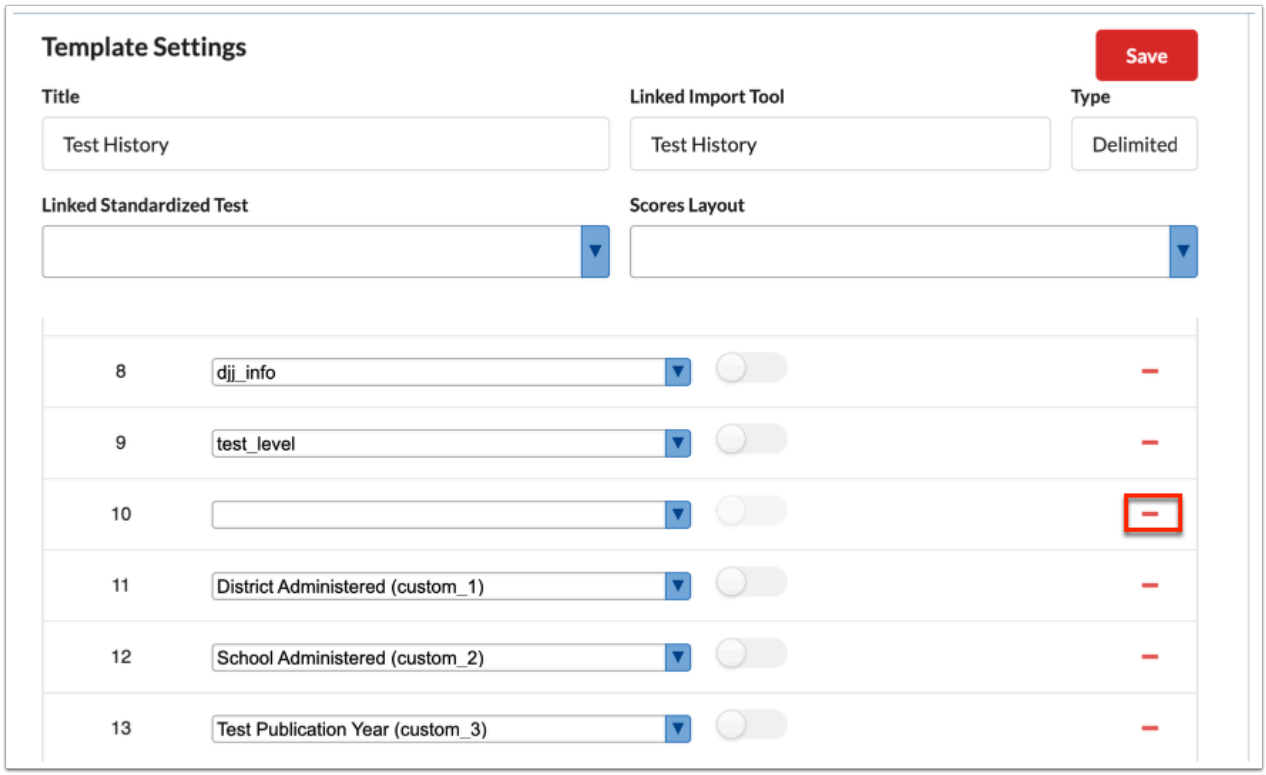
8. Click the **Mapped Field** pull-down to change the destination table column, as needed.



9. Click the **Override** toggle to map a different field from the one automatically matched here; click the Override toggle, then enter a new default value in the provided text box.

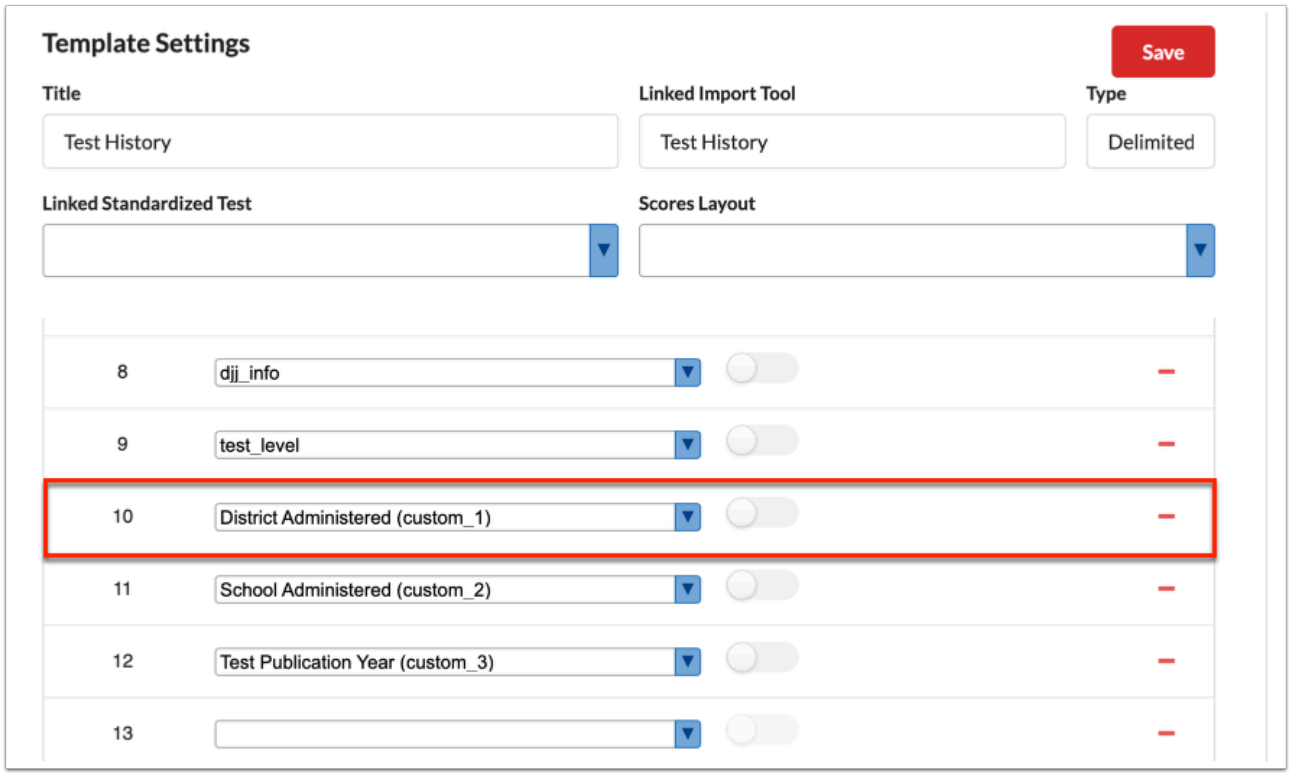


10. Click the **delete** button to delete any mapped fields from the template.

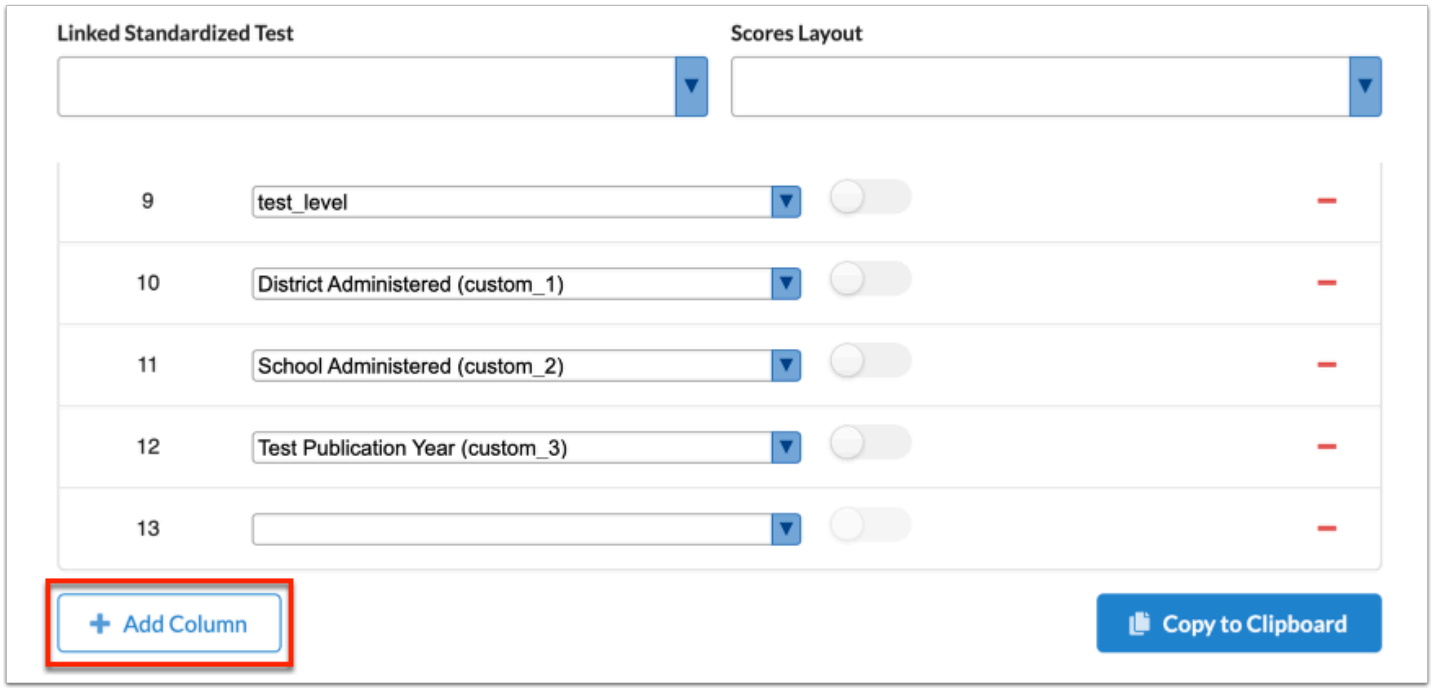


Deleting a mapped field will move all other fields up. For example, if column 10 is deleted, column 11 and the mapped field now become column 10. If you have deleted a column and mapped field be mistake, do not Save the changes to the template.

Modifying the order of the columns can disrupt the import that uses the template. The template columns should always match the order of the file you are trying to import.

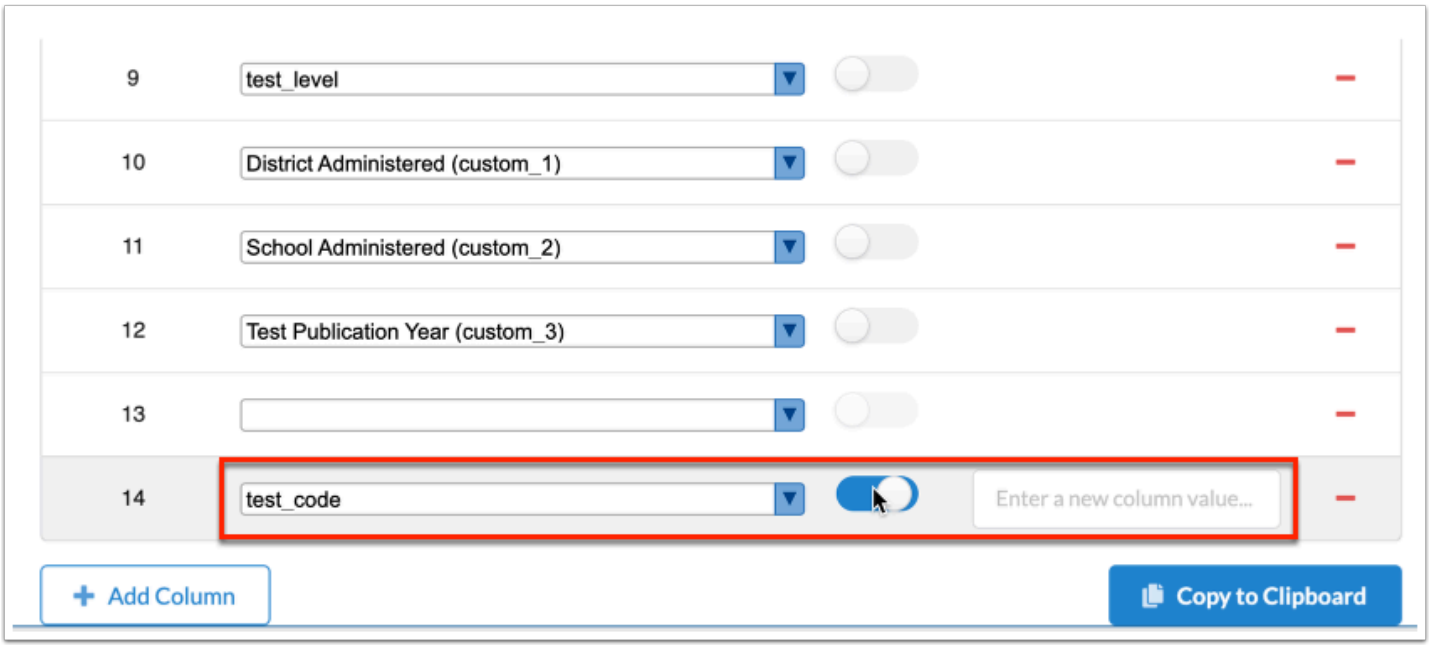


11. To default a value into a table column for a field that does not exist in the file, click **+ Add Column**.

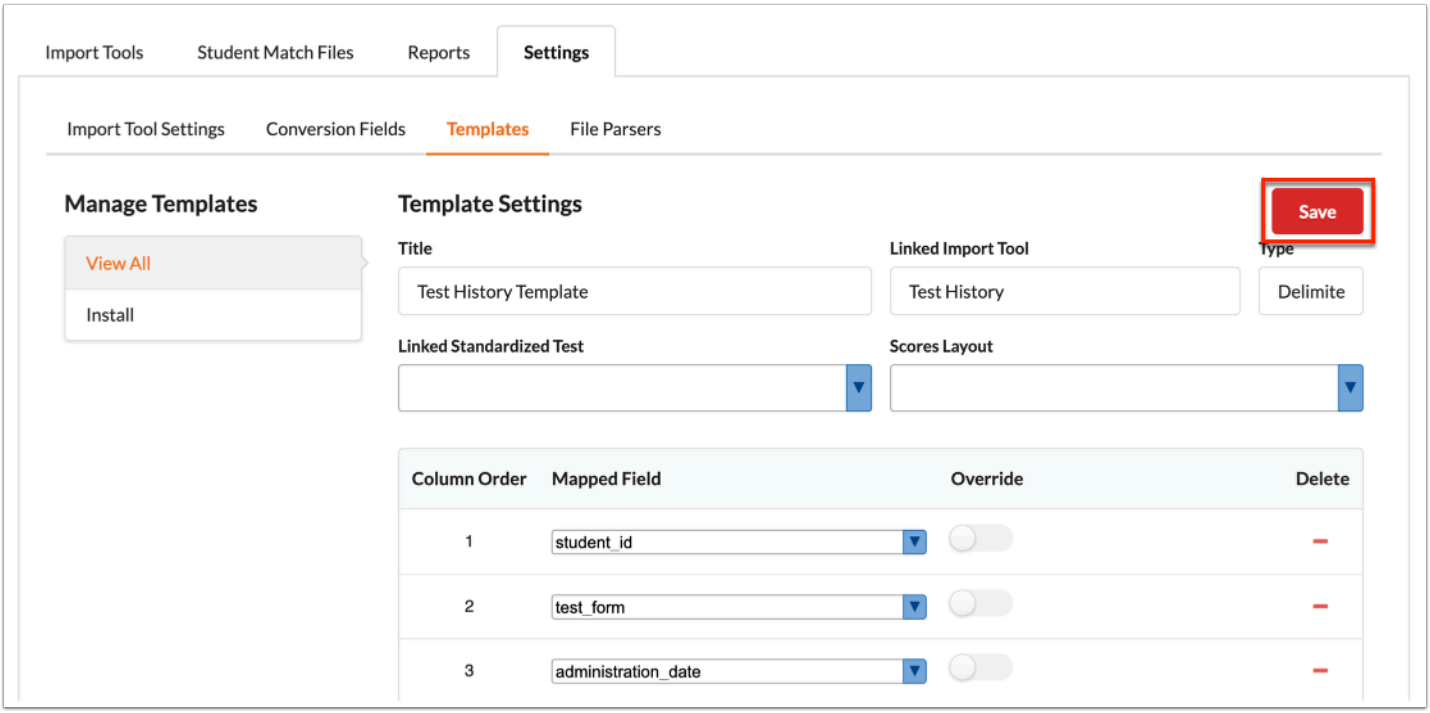


a. In the added row, select the destination table column from the **Mapped Field** pull-down.

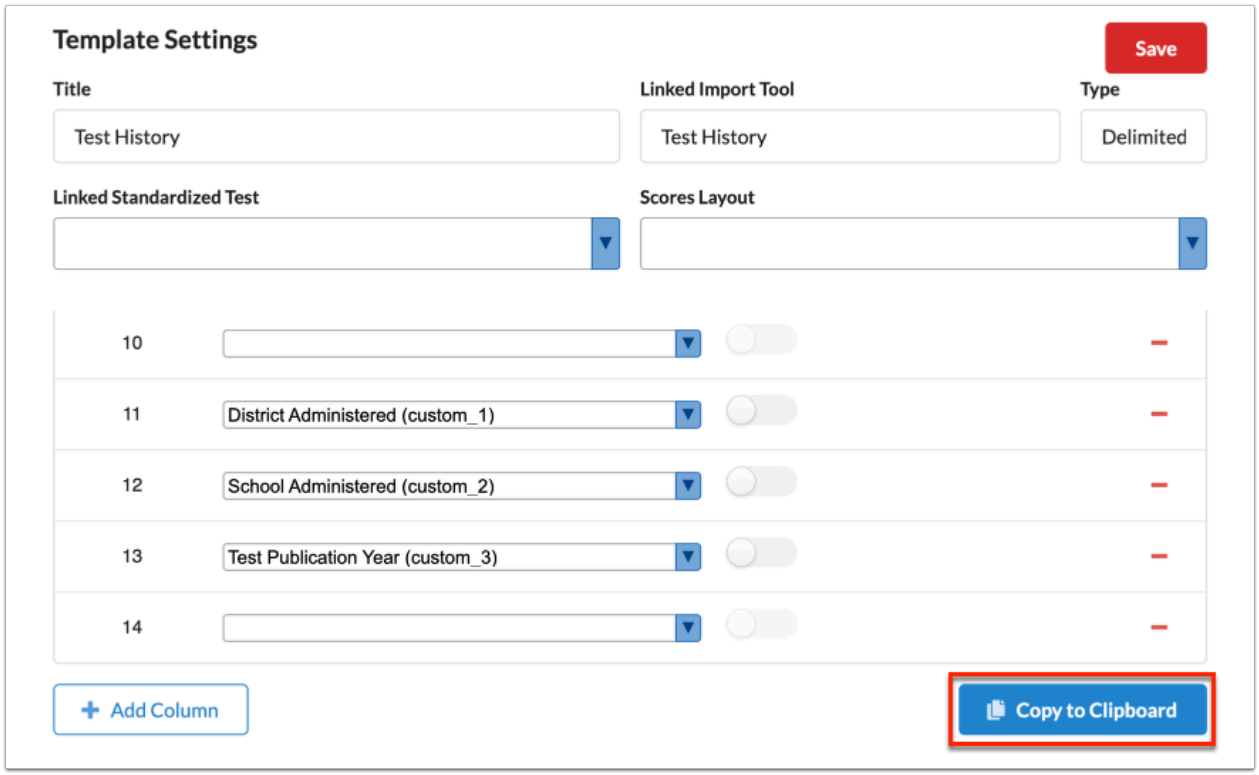
b. Click the **Override** toggle to map a different field from the one automatically matched here; click the Override toggle, then enter the default value in the provided text box.



12. Click **Save** to apply changes.



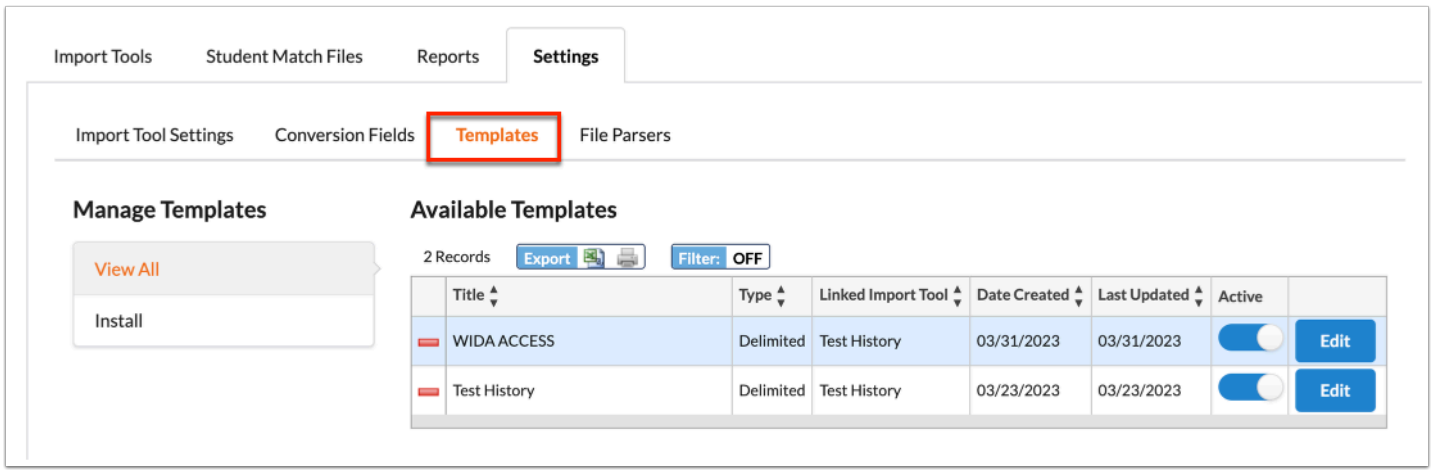
13. Click **Copy to Clipboard** to create a copy of an existing template with the code here. Once copied and pasted in the Code section from the Install tab, you can modify the code to fit your needs. This is a useful tool when needing to copy a template from one environment to another.



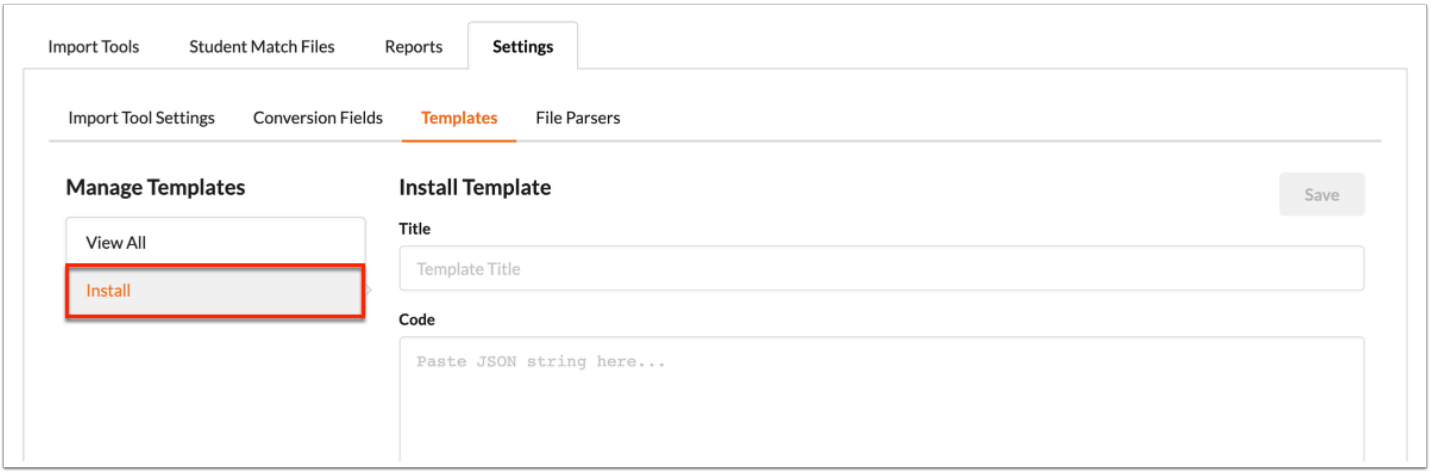
Installing New Templates

The Templates tab allows users to create new templates, which contains the ability to set up a new template and insert copied SQL code from an existing template. Once the template is created and SQL data is posted, users can edit and modify the data to fit their needs.

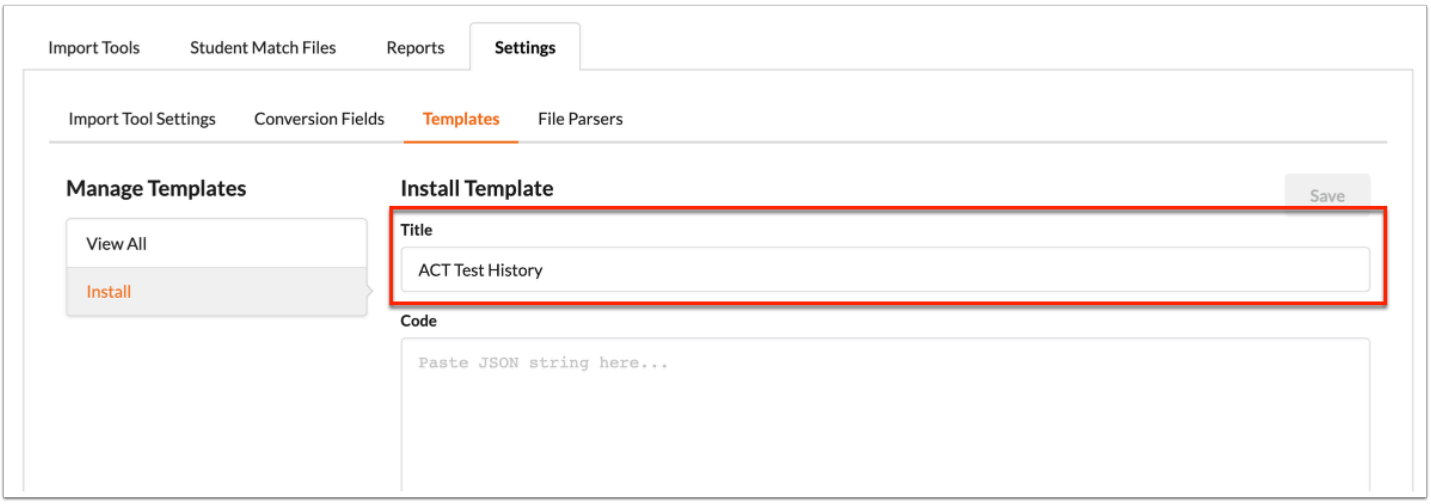
1. Click the **Templates** tab.



2. Click the **Install** tab.

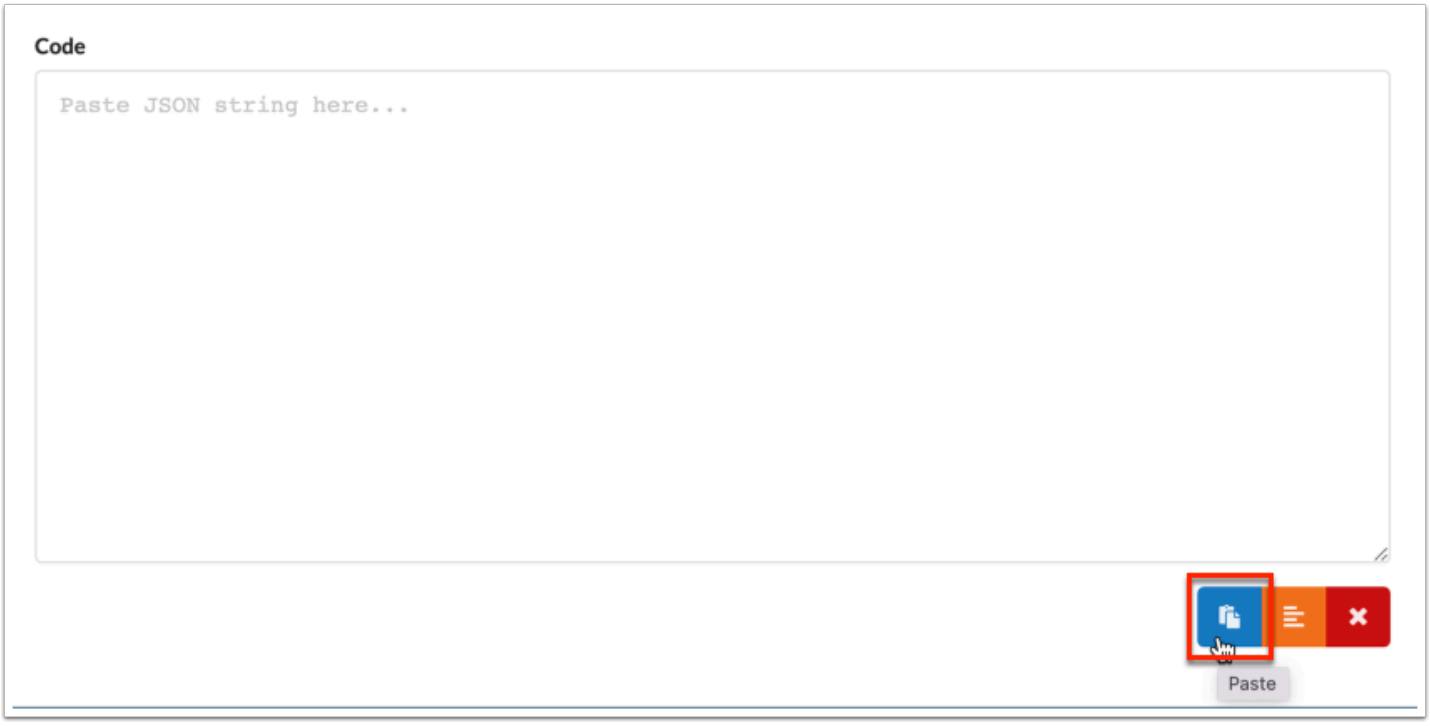


3. Enter the template title in the **Title** text box.



4. Enter the JSON string **Code** from an existing template in the provided text box.

a. Click the **Paste** icon to paste from the clipboard.



b. Click the **Format JSON** icon to format the entered code to a JSON appropriate format.

c. Click the **Clear** icon to delete all entered or pasted code from the text box.

5. Click **Save**.

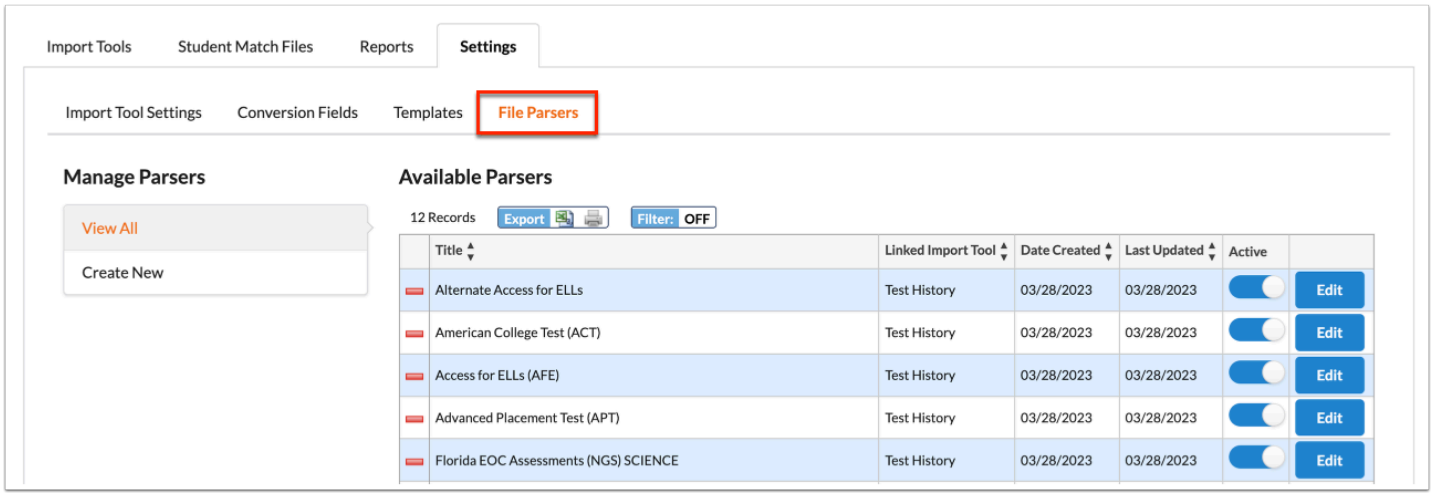
Once saved, the new template displays in the View All tab for you to modify. You'll need to link the template to an import tool in order for the template to be available for use during an import.

File Parsers

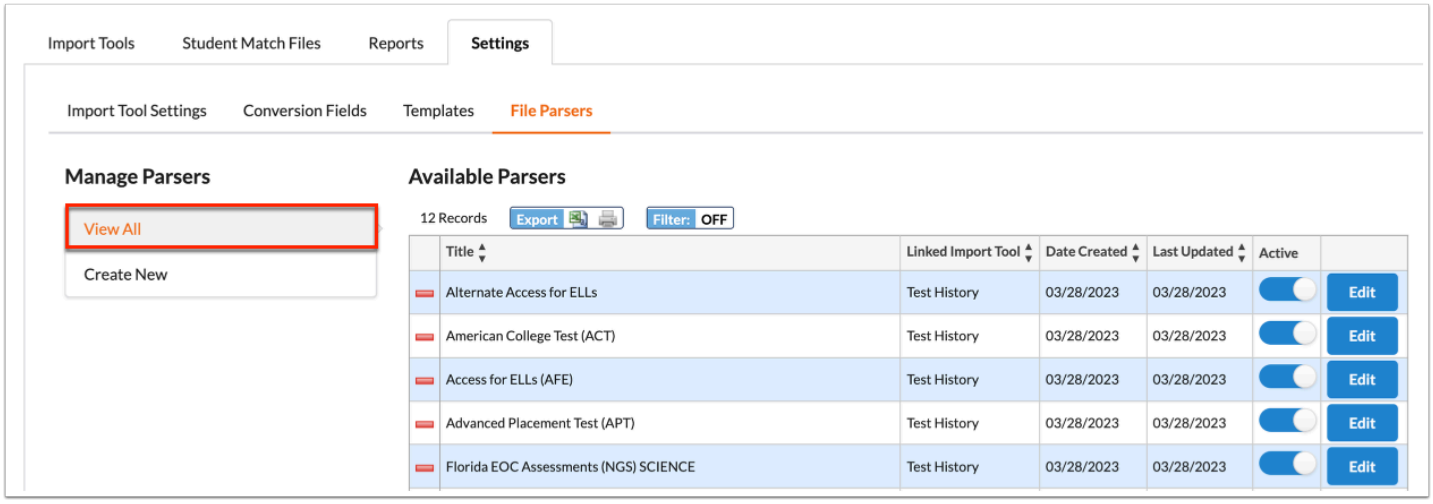
The File Parsers tab allow users to create new parsers by storing the necessary SQL code as well as edit SQL code for existing file parsers.

Existing File Parsers

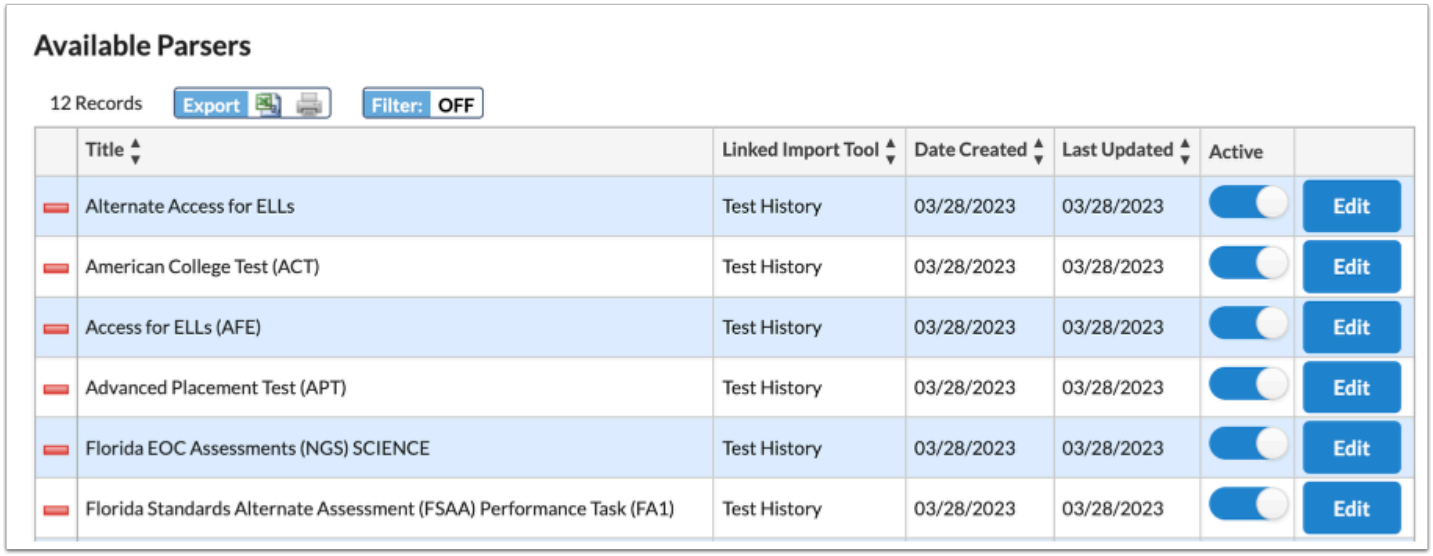
1. Click the **File Parsers** tab.



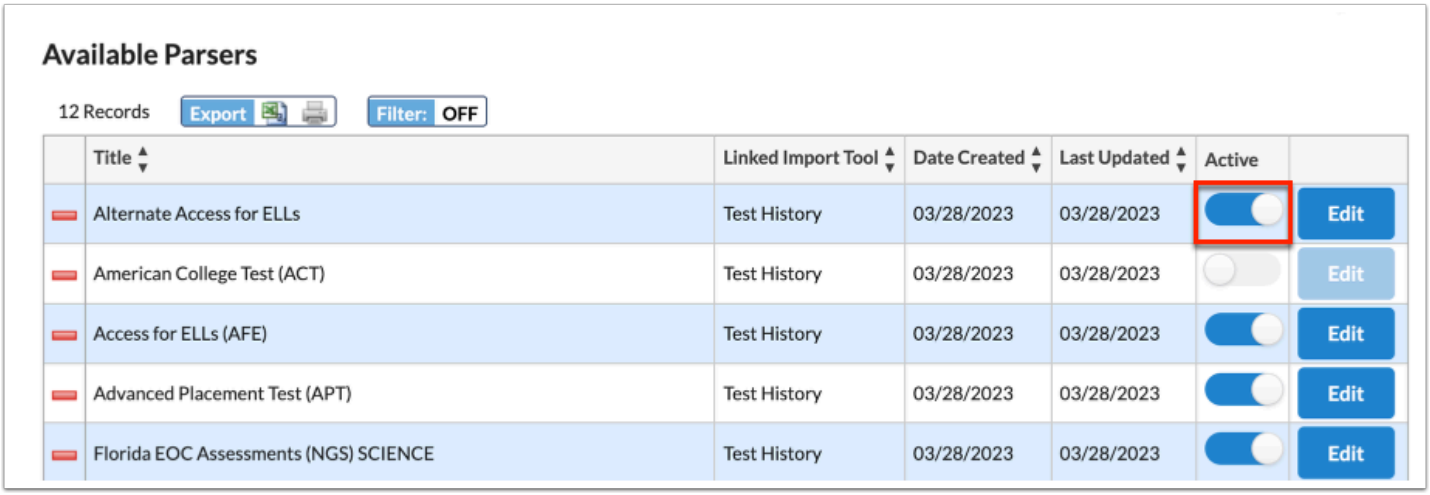
2. The **View All** tab is selected by default, which allows you to view all Available Parsers.



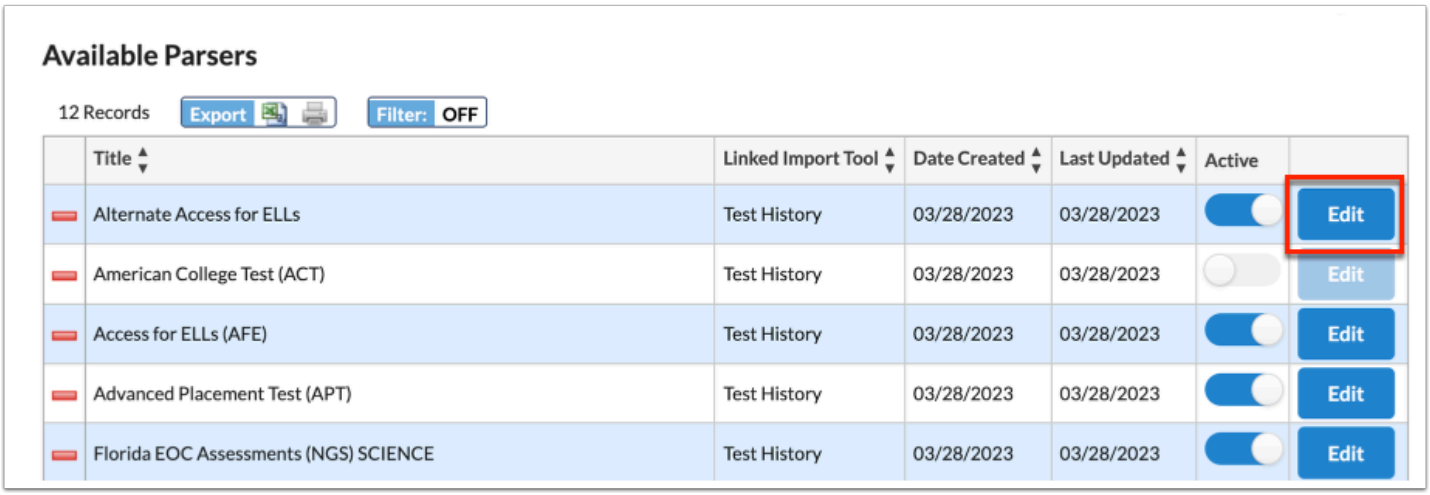
Review the Title, Linked Import Tool, Date Created, Last Updated, and whether the parser is Active.



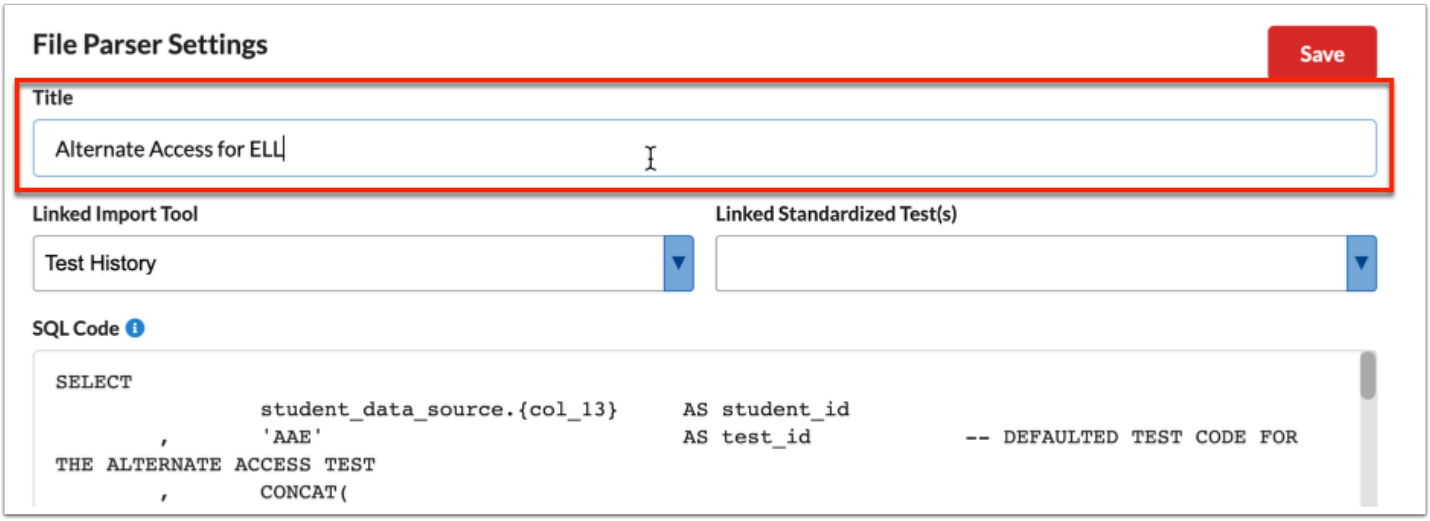
3. If needed, click the **Active** toggle to deactivate the parser, which ensures no one can use until it is reactivated. This is a good alternative to deleting parsers.



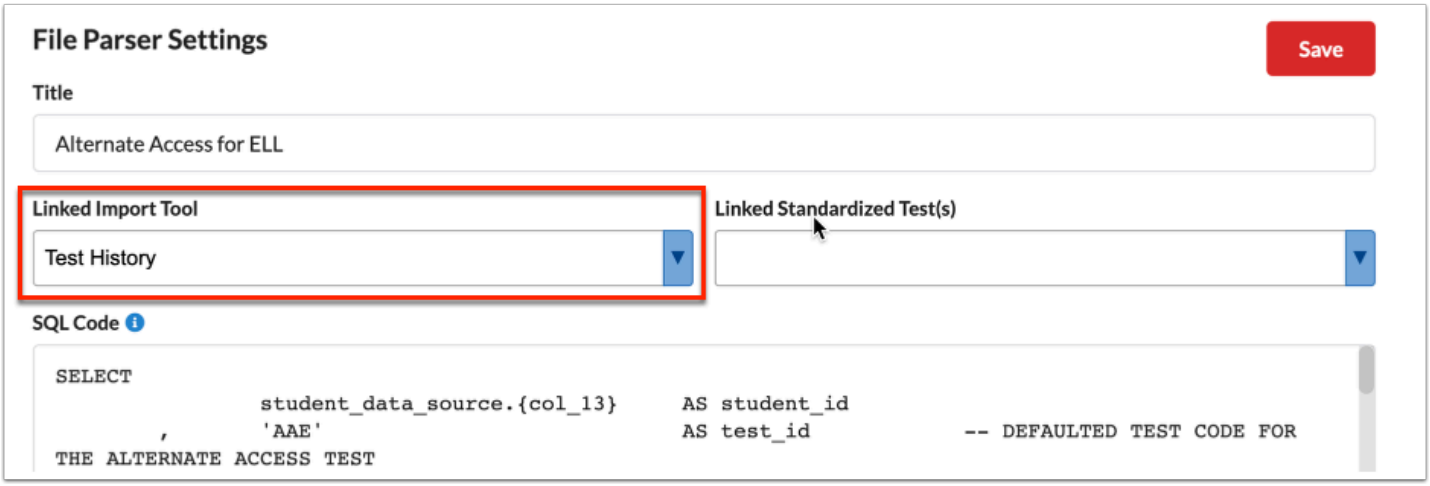
4. Click **Edit** to edit the parser including the title, linked import tool, the code, and more.



5. Click the **Title** text box to edit the parser title.

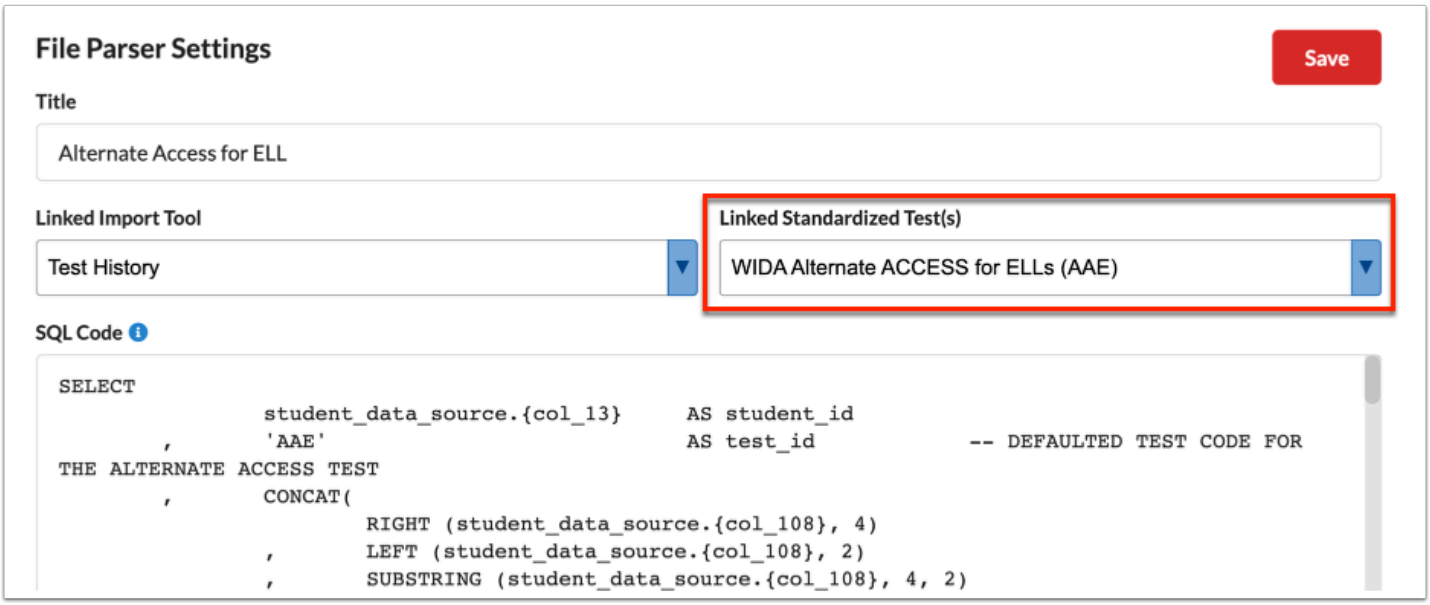


6. Click the **Linked Import Tool** pull-down to change the selection made and apply a different impor tool.

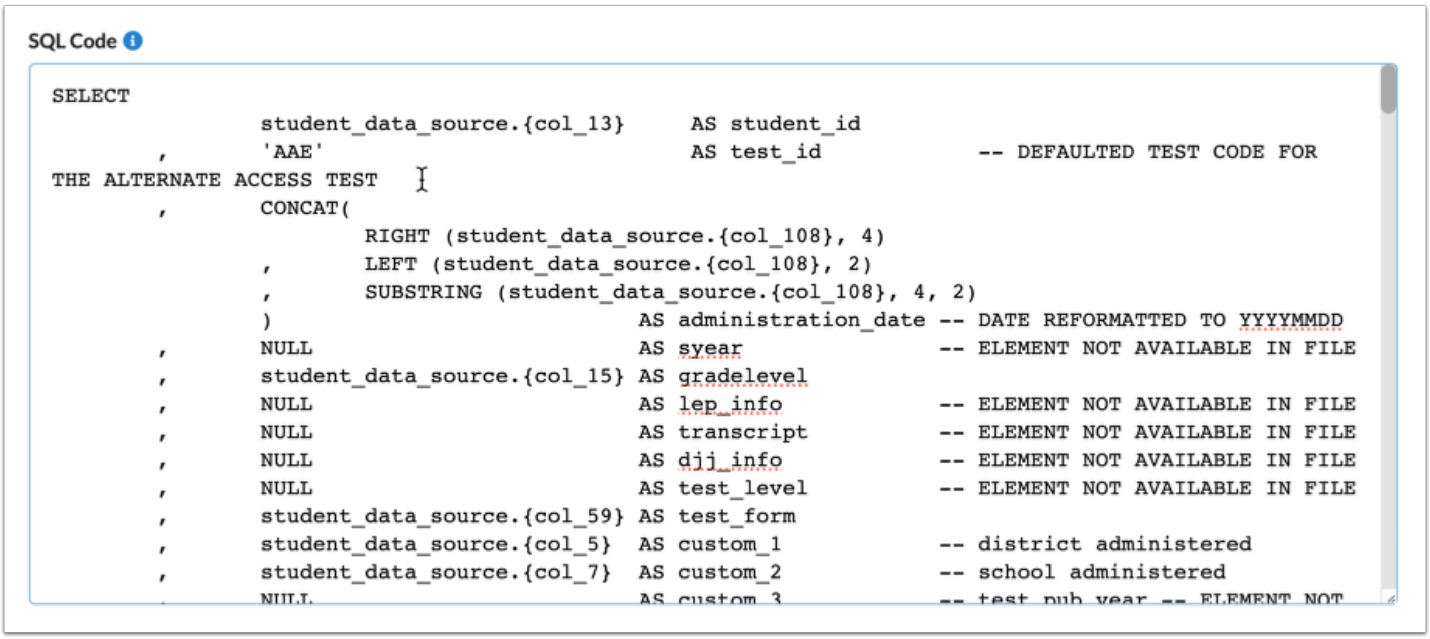


7. Additional pull-downs may display depending in the Linked Import Tool selected, such as Linked Standardized Test for the Test History import tool. See Import Tool Requirements for information about each Import Tools and their requirements.

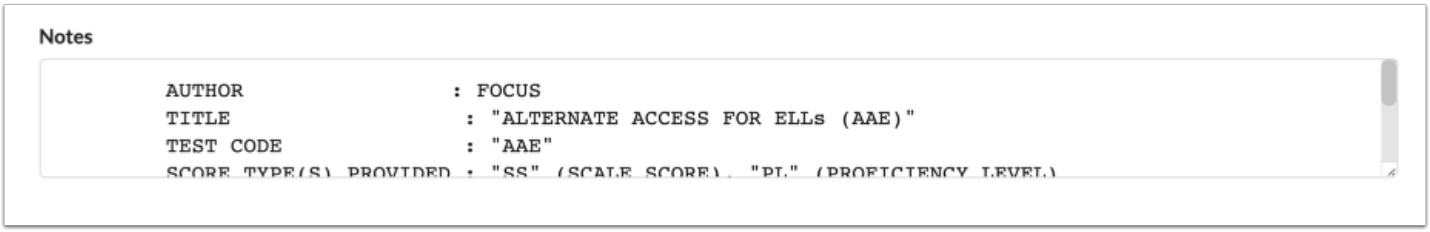
This is helpful when you have multiple test history file parsers as they can now be organized by the individual test. This feature filters the options available when selecting the settings for an import.



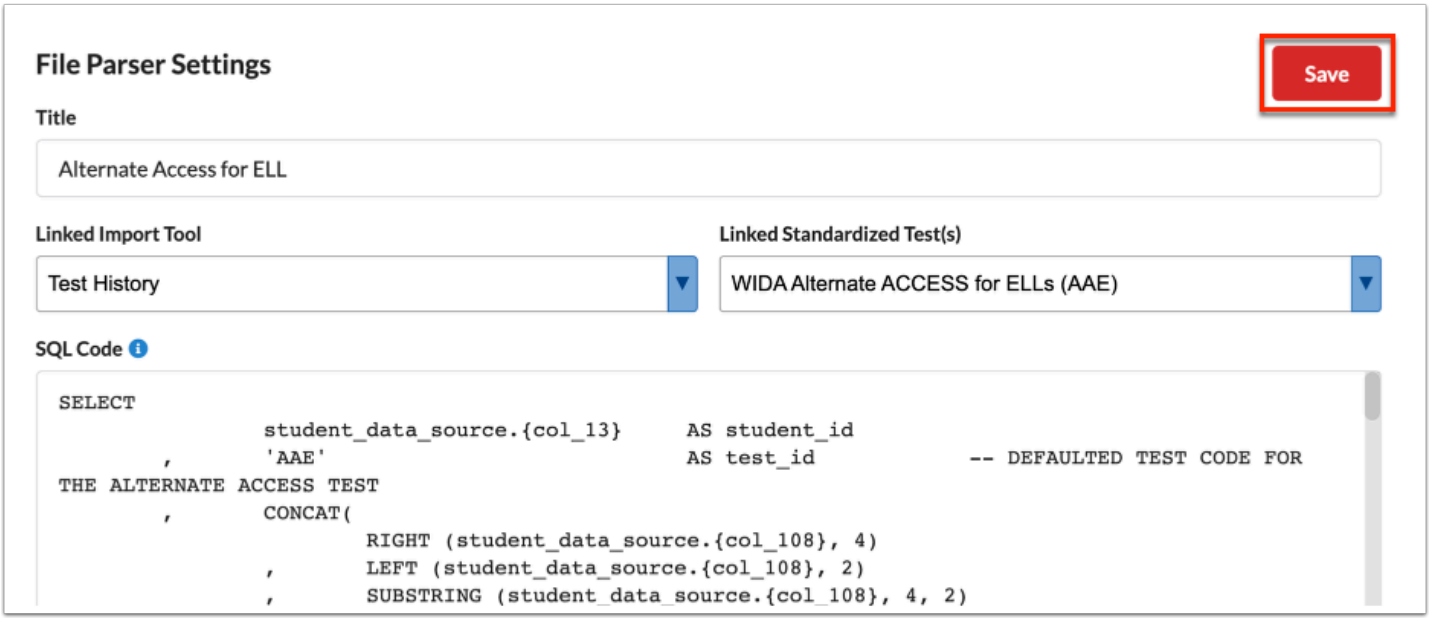
8. Edit the **SQL Code**, as needed.



9. Edit or enter **Notes** in the provided text box, as needed.



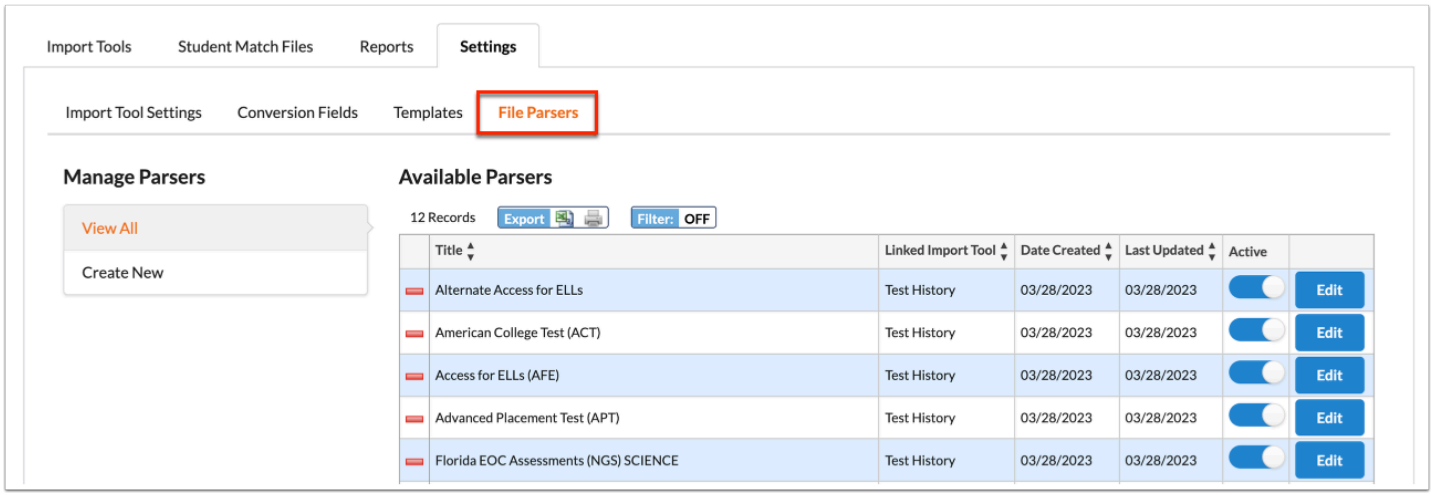
10. Click **Save** to apply changes.



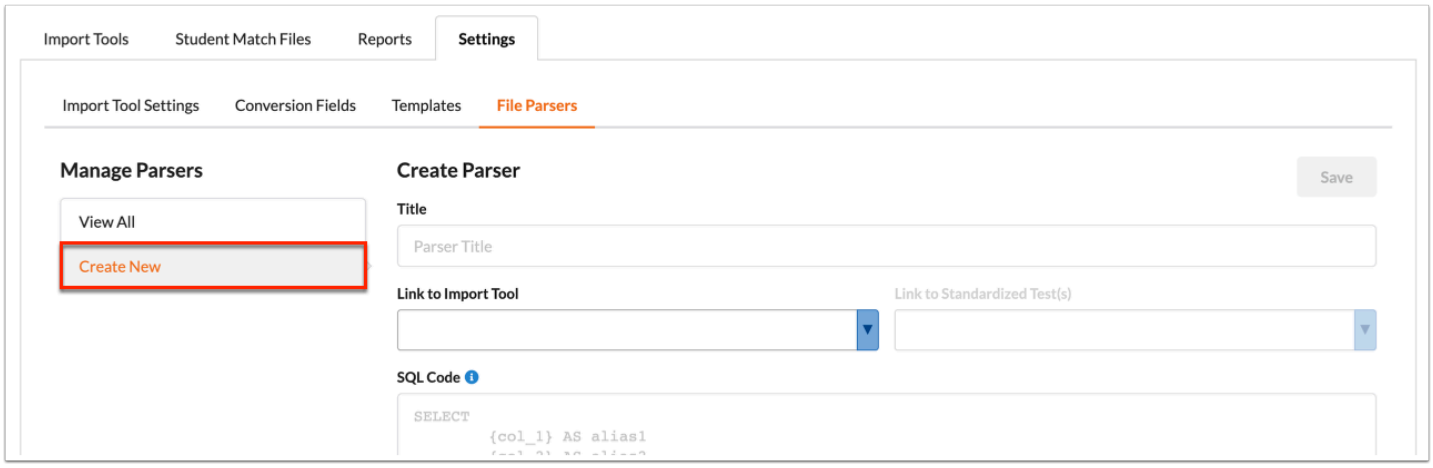
Creating New File Parsers

The File Parsers tab allows users to create new file parsers, which contains the ability to set up a new file parser and insert copied SQL code from an existing file parser. Once the parser is created and SQL data is posted, users can edit and modify the data to fit their needs.

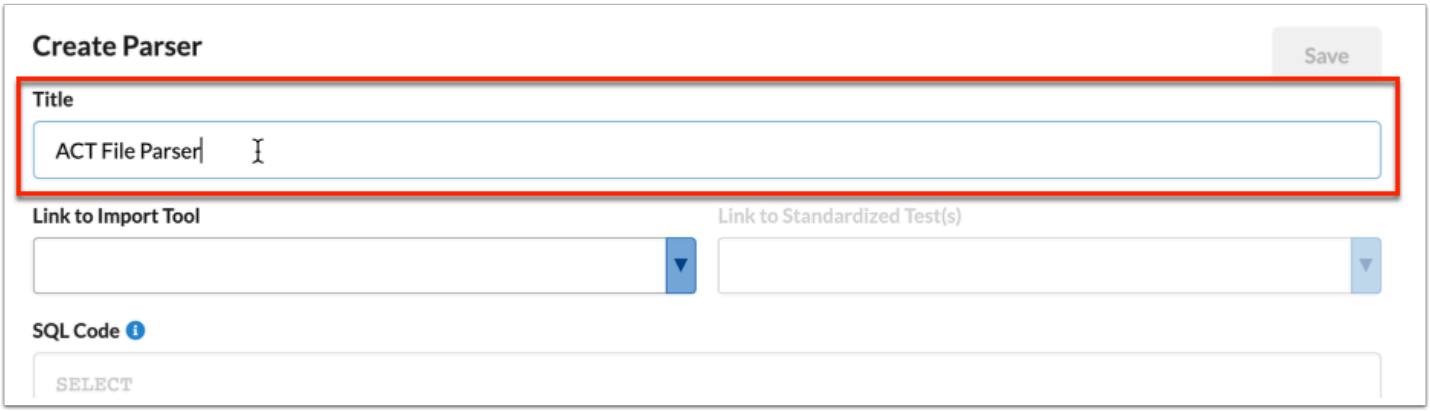
1. Click the **File Parsers** tab.



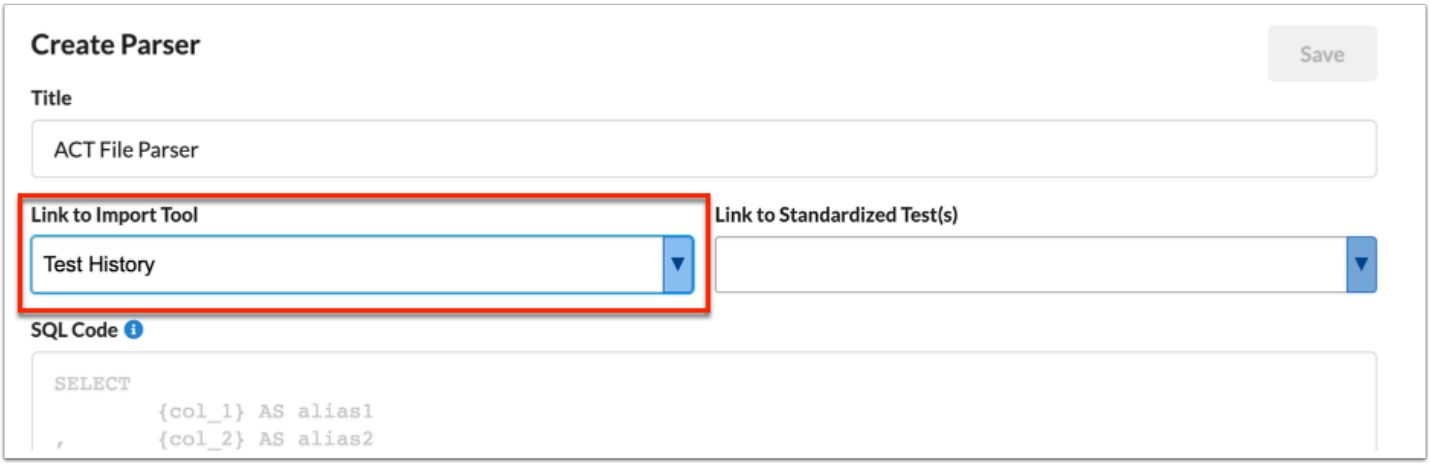
2. Click the **Create New** tab.



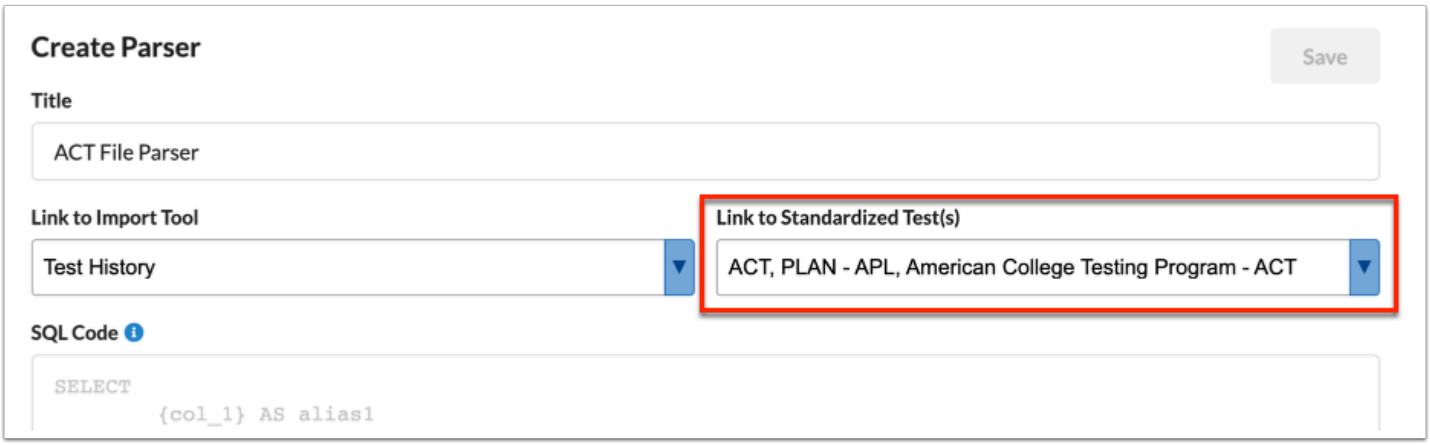
3. Enter the **Title** in the provided text box.



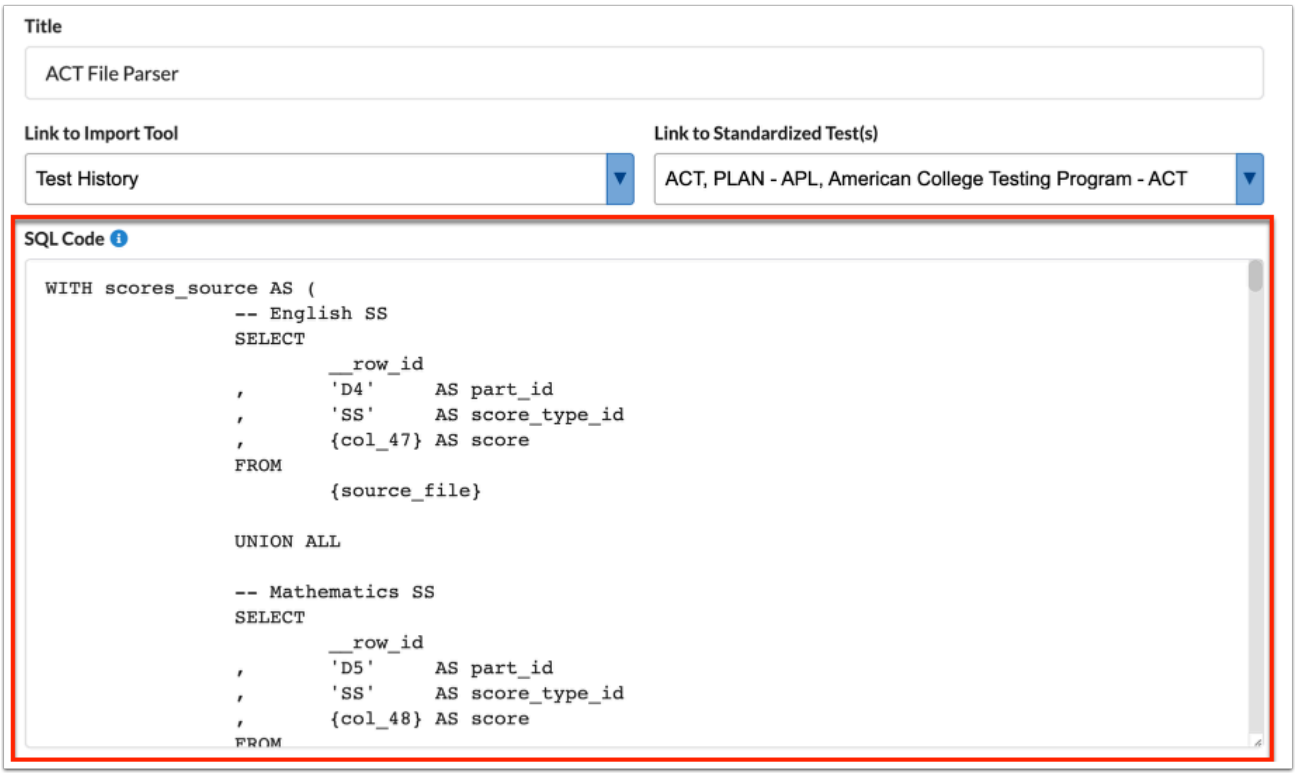
4. Select the **Linked Import Tool** from the corresponding pull-down.

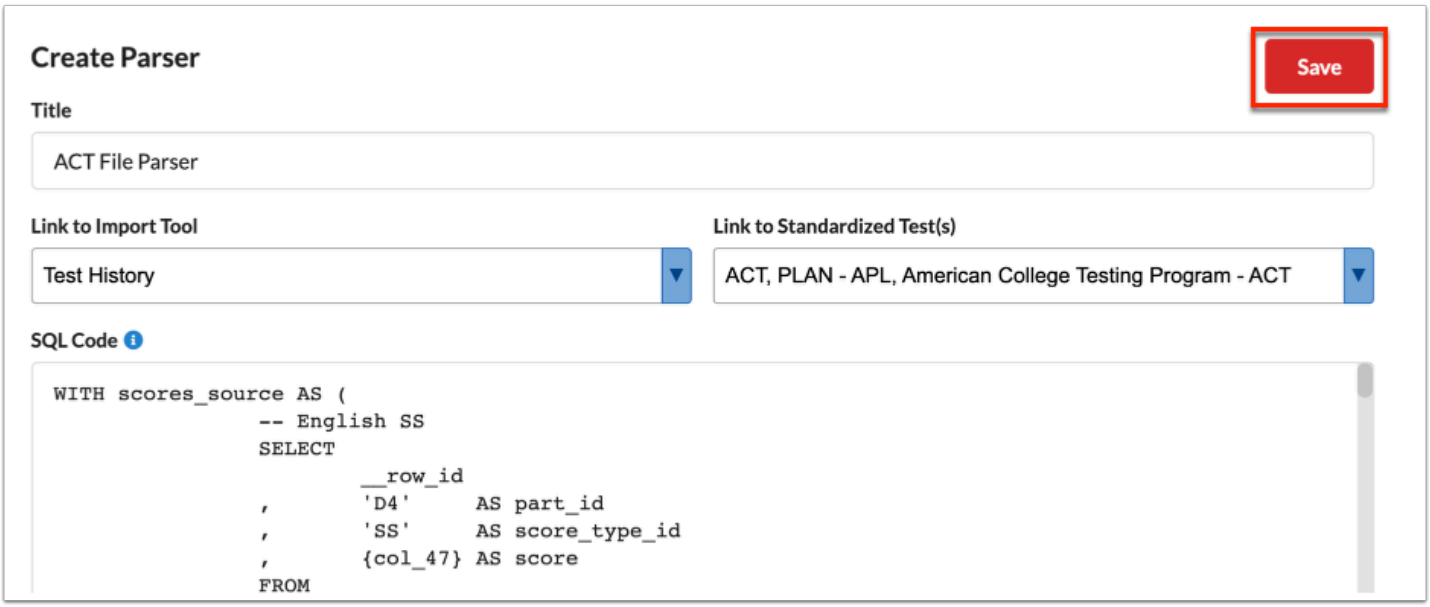


5. Additional pull-downs may display depending in the Linked Import Tool selected, such as Linked Standardized Test for the Test History import tool. See Import Tool Requirements for information about each Import Tools and their requirements.



6. Enter the **SQL Code** in the provided text box.



7. Enter **Notes** in the provided text box, as needed.

8. Click **Save**.