

I-STAR IMPORT CHECKLIST

STEP 1: I-STAR PRE-IMPORT CHECKLIST

- □ Make sure your district(s) have completed a recent upload to SIS. It is important that SIS data is current.
- Ensure that you have completed the SIS import with SIS Id Matching from your last ISBE FACTS transmission.



- □ When prompted, run the report 'Students with ISBE SIS ID Matching Client Entered SIS ID'. This report details the students that had a correct SIS Id match. These will be the students imported into I-Star if they have 'Include in FACTS Approval file' checked on their FACTS record.
- Check Data Validity in iePoint> and print the Errors/Warnings report for reference.

STEP 2: I-STAR IMPORT SECURITY SETTINGS

□ Before the import process can be performed in I-Star, the user account importing the data will require Access to that Role.

□ To Request Access to the Role:

• Click Request Access on the I-Star Landing Page.



- Click Modify beside User's Assigned System Roles.
- Select all security roles with the access level that your account needs. The new role to
 acquire access to is Personnel Approvals/Claims Import and/or Student Approvals/Claims
 Import

Per	sonnel Appro	ovals / Claims Import (Clear)
Request Access	Current Access	Role Name
0	۲	Import Personnel Claims Full Access
St.	udent Appro	vals / Claims Import (Clear)
A REAL PROPERTY AND A REAL PROPERTY AND A		
Access	Access	Role Name

• Once the appropriate roles are selected, click Save.

The District Superintendant or Coop Administrator will have to approve the request, unless they have designated a District Security Administrator to assist with security management. To approve the request:

• Click Approve/Deny a Security Request

Approve/D At least one person having whe details of the	eny a Secur as submitted a security request.	request. Use this quick link
Click the Security Requests tab	Manage Security	Security Requests (1)
	Revie Reque	w ast
	<i>c</i> r	
Click the icon in the Review requ	est column	
Review the request and click App	prove	



STEP 3: IEPOINT> DATA FILE CREATION

□ Verify that you are running iePoint>2016.1.5

Select File->iePoint> Manager->Create Files for I-Star Import

File Edit Forms Navigation Window Help Print Reports + forme Hbug Alerts GoalMine ISBE + Print Setup -	🛿 ie	Point>	2016.1.5	- Data2016					
Print Reports Print Setup Check Data Validity ISBE Reporting Re-Create Flat Files Change School Year Set Data Location Test Secure Connection System Maintenance iePoint> Manager Import Student General Data Mass Change Start New Year Import SIS Information Session Management iePoint> User Accounts iePoint> User Accounts iePoint> User Accounts iePoint> Groups Manager Reports Check for Software Updates Install Software Updates	File	Edit	Forms	Navigation	W	indow	Help		
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Session Management iePoint> User Accounts iePoint> Groups Manager Reports Check for Software Updates Install Software Updates Create Files for I-Star Import						Im	port SIS Inform	ation	
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iePoint> Groups Manager Reports Check for Software Updates Install Software Updates Create Files for I-Star Import						ieP	oint> User Acc	ounts	
Manager Reports Check for Software Updates Install Software Updates Create Files for I-Star Import						ieP	oint> Groups		
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Create Files for I-Star Import						Inst	tall Software U	pdates	
						Cre	ate Files for I-S	Star Import	

 \square The next screen allows you to select the data types you would like to transfer to I-Star

I-Star				2
This process will create file to import	iePoint>2016 data into I-Star.			a to serve
Student Approval and Claim	Student Transportation		Student Events	Student Contacts
Personnel Approval and Claim	Student Enrollment and C	Caseloads	Student Notes	
	Create I-Star Files	Close		

Check the box for the data type/types that you would like to transfer then click Create I-Star Files. Note: The Student and Personnel Approval and Claim files must be imported into I-Star first; however, you may create all of the data files at once from iePoint>



 \square For each data type selected, a separate file will be created. Select the location to save the files and click Save

Save in:	Desktop) 🗊 😕 🛄 🕇	
Auick access	Cone One	Drive	2		
Desktop	This	PC		ibraries	
1	USB	Drive (Q:)		JSB Drive (R:)	
Libraries	USB	Drive (V:)	S	Network	
This PC	•	negroup			
Network	Save As	studentimport_20160)310_133809.csv	~ (<u>S</u> ave
	Save as type:	csv		~	Cancel
					Code Page

 $_{\square}$ Once all desired data has been saved, close iePoint> and login to I-Star

STEP 4: I-STAR DATA IMPORT (USING IEPOINT> FILE)

Once you have logged into I-Star, select the Upload Files tab (If uploading a student file, navigate through Student Approvals & Claims. If uploading a personnel file, navigate through Personnel Approvals & Claims.)



Click Add(+)

File(s) Uploaded (🔂	Add)
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- Verify that the School Year is 2015-2016, then based on the data you are importing, select your file type. In this example, we are importing the Student Approval/Claim file. <u>The student Approval/Claim file must be imported first.</u>
- Check the 'Replacement File' check box, the 'File From iePoint>' check box, then click 'Choose File' to locate the file that you want to import for that file type

(Note: 'Replacement File' is only a valid option for the Student and Personnel approval/claim types and will add all the records with SIS/IEIN matches to I-Star and will remove any existing records that are not in the file. If this is not checked then the existing records in I-Star will remain even if those records are not included in the file.)

□ Click 'Choose File' and browse to the location you saved the CSV during the iePoint> process. Click the STUDENTIMPORT CSV, then click 'Submit'. You <u>MUST</u> import the student file first.

Import Studen	t Approval	Step 1
You are importing a Si when you are ready. T out after submitting.	tudent Approval File. Select a file from your local system and click Su The approval will be uploaded immediately and you will not be able to	ubmit o cancel
School Year:	2015-2016	
File Type:	Student Approval and Claim	•
Replacement File:	✓	
File From IePoint:		
File Format:	Delimited	•
Delimiter:	Comma {,}	•
Data Character:		
Skip First Row:	Image: A start and a start	
File:	Choose File No file chosen	
Continue - Please	continue the wizard.	
Ocancel - Please ex	it the wizard.	
	🚫 Cancel Subn	nit 🔶

			^
$\leftarrow \rightarrow \uparrow \uparrow \square \uparrow$ This PC \rightarrow D	esktop v Ö	Search Desktop	Q
Organize 💌 New folder		822 -	• 🔳 🕐
🖈 Quick access	Name	Date modified	Туре
	CASELOADIMPORT_20160310_135815.CSV	3/10/2016 1:58 PM	Microsoft Exce
ConeDrive	PERSONNELIMPORT_20160310_134445.CSV	3/10/2016 1:44 PM	Microsoft Exce
📃 This PC	La STUDENTIMPORT_20160310_134441.CSV	3/10/2016 1:44 PM	Microsoft Exce
	*		\$
File <u>n</u> ame: STUC	×	All Files	×

Click 'Return' on the screen below then check your email for correspondence from I-Star regarding the status of the process. The emails will come to the email address that is attached to the IWAS user account from <u>istar@isbe.net</u>. The first email will say 'The Student Approval and Claim batch that you submitted has started error checks.' The second email will say 'The Student Approval and Claim batch that you submitted finished processing. Please log into I-Star to review the status of your records.'

DO NOT BEGIN ANOTHER IMPORT UNTIL THIS EMAIL IS RECEIVED. THE SYSTEM ONLY ALLOWS FOR ONE IMPORT AT A TIME.

Import Student Approval		Step 2
File uploaded successfully.		
We received the file successfully. It will n an email shortly about the disposition	ow be submitted for error on of the records at the e	checking. You should receive mail registered in IWAS.
Submit		
Cancel - Please exit the wizard.		
🔶 Previous	🚫 Cancel	Return 🔶
After the file has finished processing run the Error	Report to see if any records o	lid not import

 File(s) Uploaded

 File Submitted
 Error File
 Error Report
 Description

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 1
 Student Approval

Student Approval Records will not import if the SIS ID in iePoint> does not match the SIS ID in I-Star.

The next data type to import is Personnel Approval/Claim. The following screen displays what the Import Screen will look like to import properly.

Import Person	nel Approval	Step 1
You are importing a Pe when you are ready. T out after submitting.	ersonnel Approval File. Select a file from your local system and he approval will be uploaded immediately and you will not be a	click Submit able to cancel
School Year:	2015-2016	
File Type:	Personnel Approval Claim	•
File From JePoint		
File From teroint.	V	
File Format:	Delimited	•
Delimiter:	Comma {,}	•
Data Character:	11	
Skip First Row:	v	
File:	Choose File PERSONNELIMPORT_20160310_134445.CSV	
Continue - Please	continue the wizard.	
Ocancel - Please ex	it the wizard.	
	🚫 Cancel S	Submit 🔶

Any Personnel without an IEIN number will not be in I-Star.

After the Student Approval/Claim and Personnel Approval/Claim data has been imported, optional files can be imported into I-Star. Optional data files that are available to import are Student Transportation, Student Enrollment and Caseloads, Student Events, Student Notes and/or Student Contacts. The import process should be followed like the preceding steps. For example, Case Load import screen would look like the following:

Import Studen	t Approval	Step 1
You are importing a SI when you are ready. T out after submitting.	tudent Approval File. Select a file from your local system and click S The approval will be uploaded immediately and you will not be able t	ubmit o cancel
School Year:	2015-2016	
File Type:	Student Caseload Data	
Replacement rile.		
File From IePoint:	2	
File Format:	Delimited	•
Delimiter:	Comma {.}	•
Data Character	n	
Chin First Down		
Skip Filst Row.		
File:	Choose File CASELOADIMPORT_20160310_135815.CSV	
Continue - Please	continue the wizard.	
Cancel - Please ex	it the wizard.	
	🚫 Cancel Subr	nit →

After each import, an error report will be available to view on the Upload tab.

STEP 5: RECHECK EDITS (CHECK DATA VALIDITY)

 \square Once the iePoint> data has been imported into I-Star, start by comparing errors in each system.

To check your data for errors click 'Recheck Edits' on the Student Search screen. A red note will appear indicating that the data has been submitted for error checking.

Edit Recheck submitted. You will receive email notice when complete.

Check your email for correspondence from I-Star regarding the status of the process. The emails will come to the email address that is attached to the IWAS user account from <u>istar@isbe.net</u>. The first email will say 'The Student Approval and Claim batch that you submitted has started error checks.' The second email will say 'The Student Approval and Claim batch that you submitted finished processing. Please log into I-Star to review the status of your records.'

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	Student Approvals Filter	
Student SIS Id:	Resident District:	
Last Name:	Resident School:	Select district to load schools
First Name:	Serving District:	
School Year: 2015-2016 V	Serving School:	
Status:	Disability:	
Grade:	Fund:	
Term:	Class Teacher:	
Tuition Status:	Class Name:	
	Event:	