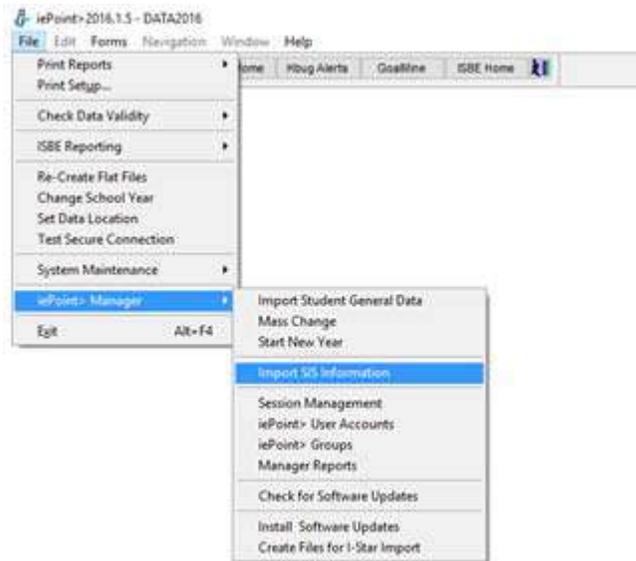# I-STAR IMPORT CHECKLIST

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

- 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 Secuirty Administrator to assist with security management. To approve the request:

- Click Approve/Deny a Security Request

Approve/Deny a Security Request
At least one person has submitted a security request. Use this quick link to view the details of the request.

- Click the Security Requests tab

Manage Security	Security Requests (1)

Review Request

- Click the icon in the Review request column
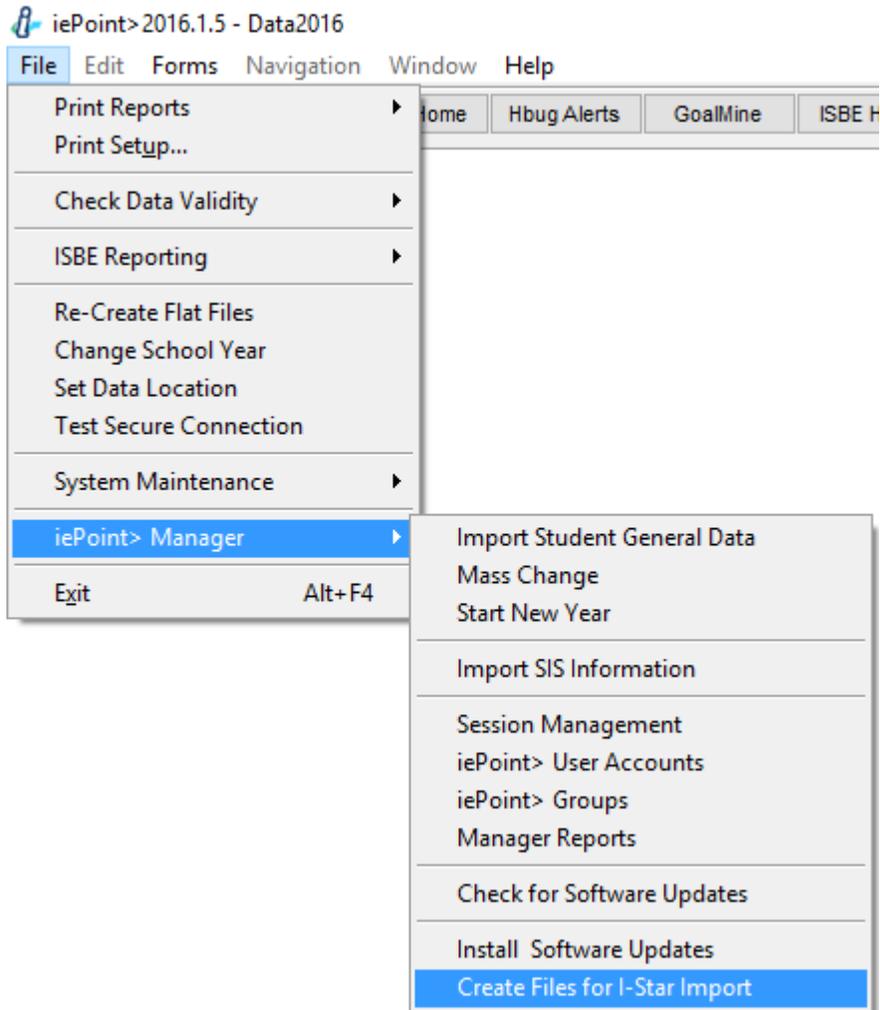
- Review the request and click Approve
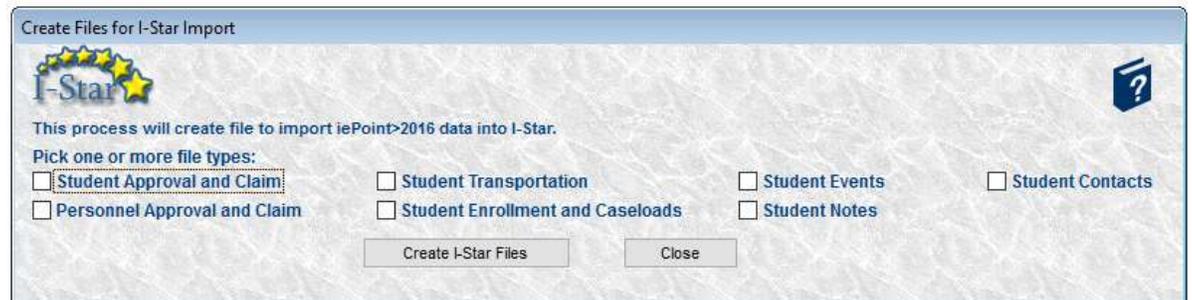

Approve/Deny User's requests

○ Approve
○ Deny

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

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

☐ 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>
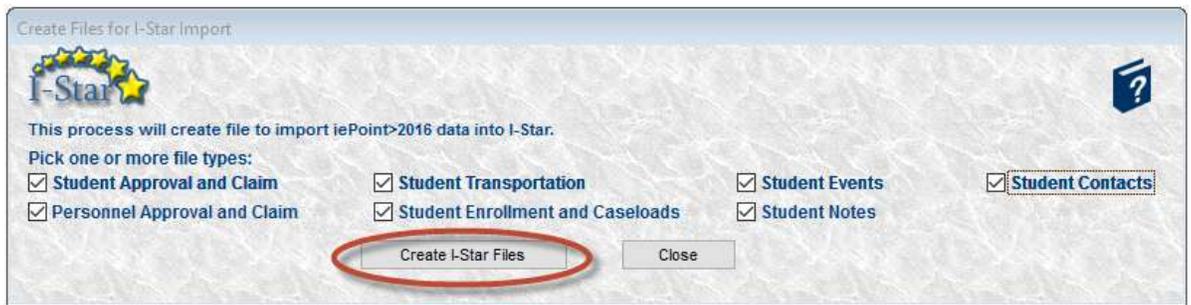
☐ For each data type selected, a separate file will be created. Select the location to save the files and click Save
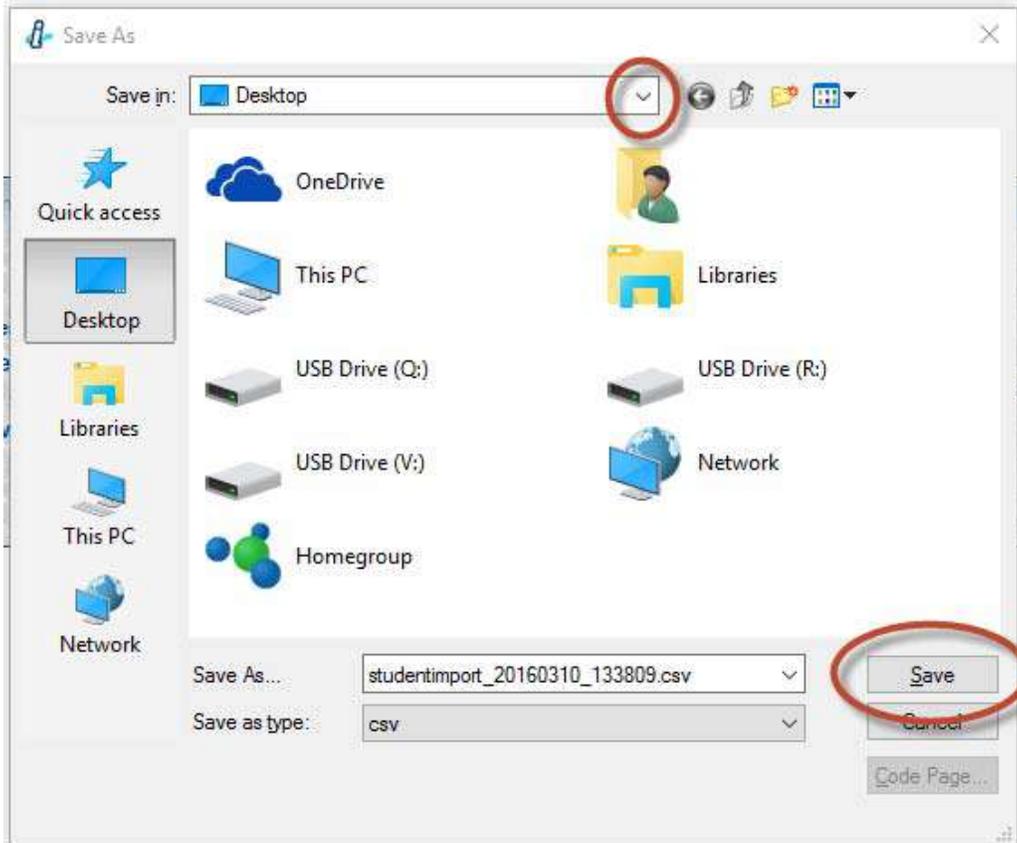
☐ Once all desired data has been saved, close iePoint> and login to I-Star

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(+)

☐ 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 Student Approval	Step 1

You are importing a Student Approval File. Select a file from your local system and click Submit when you are ready. The approval will be uploaded immediately and you will not be able to cancel out after submitting.

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:	☑
File:	Choose File No file chosen

◉ Continue - Please continue the wizard.
○ Cancel - Please exit the wizard.

🚫 Cancel   **Submit** ➡
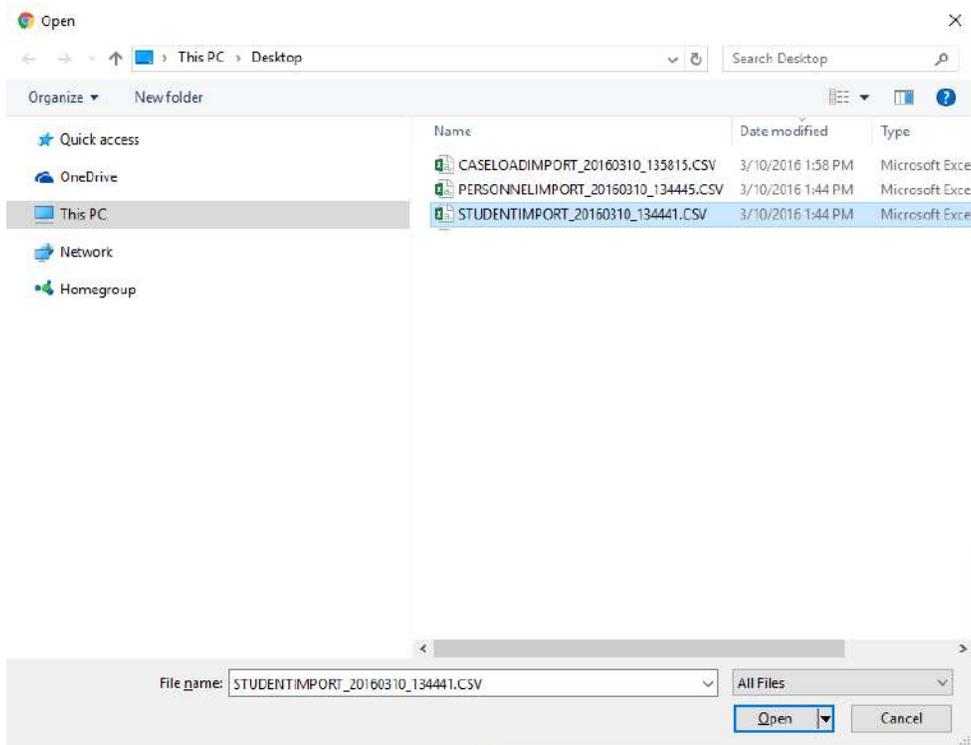
Click 'Return' on the screen below then check your email for correspondence from I-Star regarding the status of the process. The emails will come to the email address that is attached to the IWAS user account from istar@isbe.net. The first email will say 'The Student Approval and Claim batch that you 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.
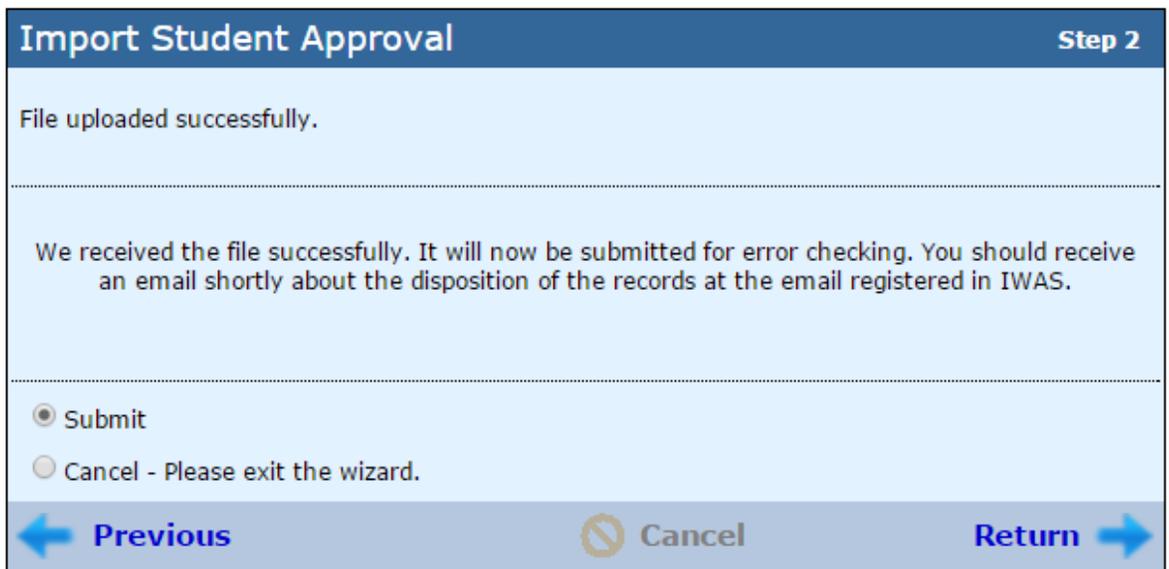
After the file has finished processing run the Error Report to see if any records did not import

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 Personnel Approval   **Step 1**

You are importing a Personnel Approval File. Select a file from your local system and click Submit when you are ready. The approval will be uploaded immediately and you will not be able to cancel out after submitting.

School Year: 2015-2016

File Type: Personnel Approval Claim

Replacement File: ☑

File From IePoint: ☑

File Format: Delimited

Delimiter: Comma {,}

Data Character: "

Skip First Row: ☑

File: Choose File   PERSONNELIMPORT_20160310_134445.CSV

◉ Continue - Please continue the wizard.

○ Cancel - Please exit the wizard.

🚫 Cancel   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 Student Approval   Step 1

You are importing a Student Approval File. Select a file from your local system and click Submit when you are ready. The approval will be uploaded immediately and you will not be able to cancel out after submitting.

School Year: 2015-2016
File Type: Student Caseload Data
Replacement File:
File From IePoint: ☑

File Format: Delimited
Delimiter: Comma {,}
Data Character: "
Skip First Row: ☑

File: Choose File   CASELOADIMPORT_20160310_135815.CSV

⦿ Continue - Please continue the wizard.
○ Cancel - Please exit the wizard.

🚫 Cancel   Submit ➡

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

STEP 5: RECHECK EDITS (CHECK DATA VALIDITY)

☐ 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 istar@isbe.net. 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.'