



ETO™ Software

DCROP – ETO Data Migration Guide_{v1}

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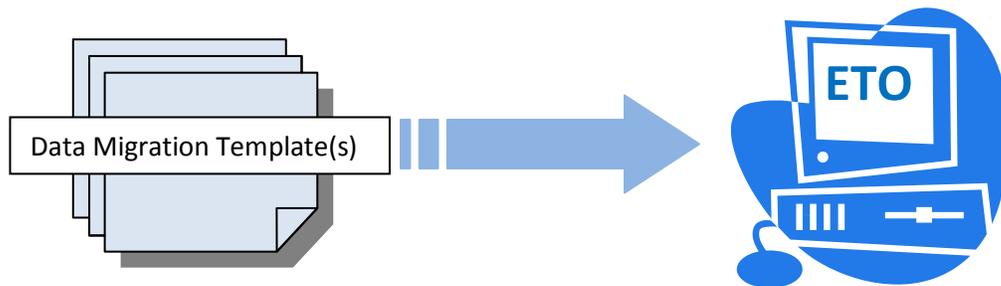
ETO Data Migration: General Overview

The ETO Impact product has built-in functionality to support the uploading of various types of information without the need for custom programming. This functionality can be used to upload external data from a historical database (or current database if you are required to use more than one software product) into ETO Software®.

While not all data types are able to be uploaded, a majority of the most commonly used data types include, participant demographics, participant assessments, participant efforts, and entity (service provider) records. Participant demographic uploads are particularly useful to avoid the manual data entry process of establishing “client” records in ETO. In instances where ETO’s built-in functionality will not support the upload of a particular type of data, Social Solutions Product Development Team may be contracted to develop a customized solution. Examples of data that are not supported through the batch upload process include surveys, and general efforts.

When uploading data into ETO, the use of a data upload “template” is required. These templates allow you to organize your data in a manner that matches the ETO configuration. Specific templates are used for each of the different types of data to be uploaded (e.g. demographics, efforts, assessments).

RULE: In order to migrate a piece of data into ETO, it has to have a place to live in ETO.



In ETO, there are two different features that can be used to upload information through the use of templates. These include “Batch Upload” functionality and “Upload Files” functionality. While these two features are similar in the way each requires the use of an upload template, they differ slightly based on the types of data each feature supports.

Batch Upload Functionality

By default, an individual with the user role of Site Administrator has the ability to access the batch upload feature buttons in ETO.

It is strongly recommended that you attend training on this feature prior to performing your own upload. Social Solutions provides a free recorded training on how to perform batch uploads. The Customer Support team also offers ETO Administrator 1:1 Advanced Support to provide assistance with Batch Upload. Please start by viewing the recorded training (found via the link below), and if you have questions, contact Jennie Seigler/George Schott for assistance.

As part of the Data Collection, Reporting and Outcomes Project (DRCOP) Project, SSI Technical Services Associates will be available to assist in the actual uploading of data from upload templates into you ETO site/program.

ETO Recorded Batch Upload Session: <https://sites.google.com/site/etosoftwarehelpmanual/free-web-based-trainings/configuring-eto>

What can be Uploaded using Batch Upload?

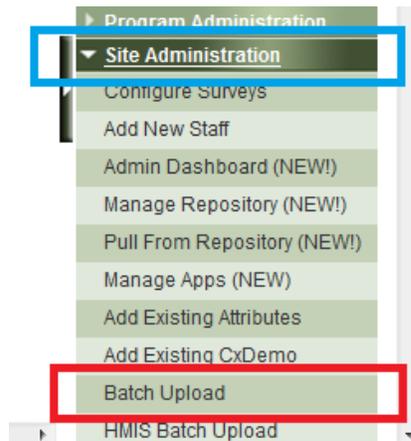
For the DCROP Project, the types of data that can be uploaded using Batch Upload Templates include:

Upload Template	DCROP Configured Data Element
Demographics	These are the data elements that we have configured on the Add Participant screen
Participant Efforts	These include the participant efforts such as “Track Direct Services”, “Track Legal Advocacy Services”,
Assessments (Participant)	Assessments tied to an individual participant record (e.g. Victimization Assessment)
Assessments (General)	Assessments that are general and not tied to a individual participant record (e.g. the aggregate reporting assessments for PCADV and PCAR reporting)
Entities	Entities are used to identify various service providers that are used in making participant referrals

1. Navigation to the Batch Upload Functionality

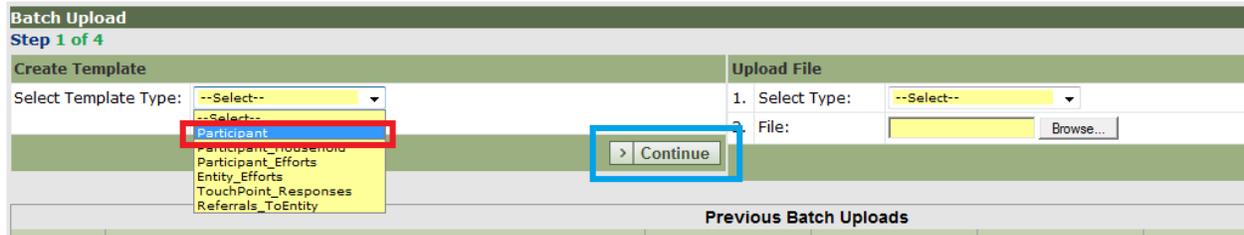
As someone logged in at the Site Administrator level, the Batch Upload feature can be accessed through:

Sidebar Navigation > Site Administration (blue box) > Batch Upload (red box)

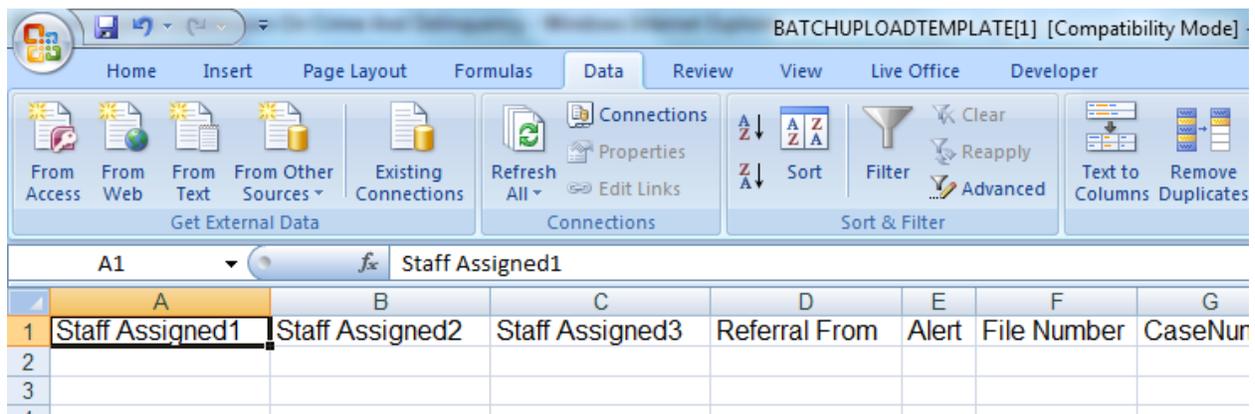


2. Creating an Upload Template

Once “Batch Upload” is selected, the user will then be able to select the type of upload template that they would like to create (red box). Once selected, by selecting the Continue button (blue box) and the program in which you want to upload to is identified Template VSP Program (CM) , ETO will automatically create an upload template.



Once the Upload Template is generated, the user can then save it to their computer as an Excel file. Note that in the below example Participant Batch Upload Template, the column headings in the template are the same as the field labels on the Add Participant screen.



3. Filling Out an Upload Template

The Upload Template is used to upload participant information. Given this, each line in the template resembles one record. In the above Participant template example, each line would be used to upload a single participant record.

Depending on the source of your data, there may be different methods that will need to be used to get your data into the ETO batch upload template.

- *Hard copy files:* for this type of data source, data will need to be manually entered into either ETO directly or the upload template
- *Excel spreadsheets:* in most cases, you can “cut-and-paste” data from the Excel spreadsheet into the ETO template
- *Other databases:* for some databases, you should be able to generate reports containing the data needed to populate the ETO templates. If reports are not necessary, queries may need to be written to pull the data into a format that can be used to populate the ETO templates. In some instances, SSI will be able to lend some assistance in how to pull data from existing systems. However, you will probably be the most knowledgeable resource in understanding your existing systems.

Regardless of the type of data source, as the upload template is completed, it is highly recommended that the information included in it matches what has been configured in ETO. This is typically what we refer to as a “data mapping” exercise. The purpose of this exercise is to ensure that the data you have targeted for upload ends up in the right place and in the correct format in ETO.

For instance, for the Gender field in ETO, we have as possible options “Male” or “Female”. These same values should be used in the spreadsheet rather than “1” or “2”. Also, for those ETO fields that have a dropdown box comprised of multiple values to choose from, make sure that the values used in the template correctly “map” to something that has been configured in ETO (e.g. Primary County).

An effective way to make sure the data is correct is to “scrub” it once it has been placed in the upload template. Remember that the upload template is nothing more than an Excel spreadsheet. Because of this, it is easy to filter and sort the information contained in the template columns to easily audit/make corrections.

T	T
Primary County	Primary County
Adams	Adams
Adams	Adams
Alleg	Allegheny

>>>>>.audited/corrected >>>>>

Once the upload template has been filled out, email it to George Schott (SSI). Prior to sending the file, remember to password protect it.

TIPS FOR ALL UPLOADS:

- Apostrophes cannot be uploaded (if any apostrophes are contained in the file - use find/replace to substitute apostrophes with blank spaces).
- Characters (apostrophes, ampersands, etc) used in names of programs and sites is not recommended.
- There is a limit of approximately 7,000 cells of data per upload. For example, a file may contain 35 columns (demographic elements, attributes, assessment elements, etc) and 200 rows (participants, entities, etc) or any combination that results in 7,000 or fewer cells. If the upload is performed late in the evening, it's possible that this capacity can be doubled. It's recommended that spreadsheets that contain more 7000 cells be divided.

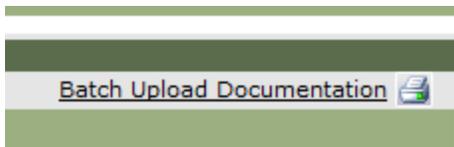
4. Uploading the Template

Once the template has been filled out, and the contents have been double-checked for accuracy, you will be able to submit it to the SSI Technical Services Associate who will then follow the step include in the Batch Upload Manual (embedded below).



Batch_Upload.pdf

If you are not able to open the above file, you can also access it from within ETO on the Batch Upload screen. To get to this screen: Sidebar Navigation > Site Administration > Batch Upload.



Summary of Batch Upload Steps

The below table summarizes the general steps to be taken when using the Batch Upload functionality.

Step	Responsible
1. Generate Batch Upload Template for (CM) Program	Site Administrator will choose the type of template to generate (always start with Participant)
2. Complete Batch Upload Template (sample)	Site Administrator/Program Staff will complete template for 5-10 records (sample set)
3. Upload Data	SSI will upload sample set
4. Confirmation of Data Upload	Site Administrator/Program Staff will audit upload against sample template to confirm
5. Complete Batch Upload Template (full)	Site Administrator/Program Staff will complete template for remaining target records
6. Upload Data	SSI will upload sample set
7. Confirmation of Data Upload	Site Administrator/Program Staff will audit upload against full template to confirm
8. Signoff on Data Upload	Site Administrator will provide email to SSI acknowledging upload success

Upload Files Functionality

By default, an individual with the user role of Site Administrator has the ability to access the Upload Files feature button is ETO.

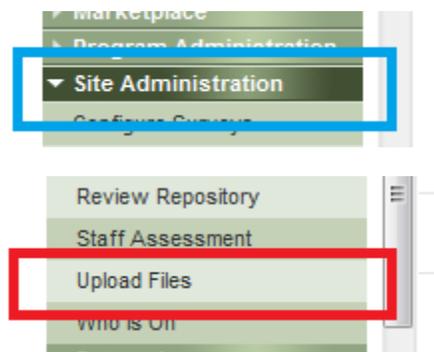
This feature is very similar to the Batch Upload feature in that it users rely on templates to organize their data prior to match the existing ETO configuration. This feature does not offer the ability to automatically create an upload template.

For the DCROP Project, this feature will be primarily used to upload Participant Assessments.

1. Navigation to Batch Upload Functionality

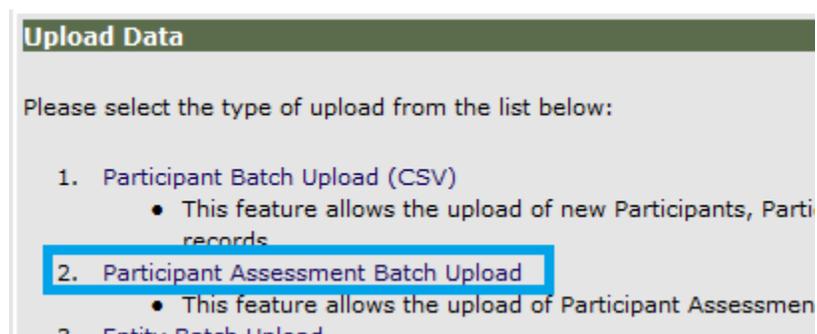
As someone logged in at the Site Administrator level, the Batch Upload feature can be accessed through:

Sidebar Navigation > Site Administration (blue box) > Upload Files (red box)



2. Creating an Upload Template

Once “Upload Files” is selected, the user will then be able to select the type of upload that they would like to complete. This is done by clicking on the name of the actual upload (e.g. Participant Assessment).



Note: with this feature, the Upload Template will need to be manually created. Once the type of upload is selected, you can access a “sample” template file to pattern your upload template from.

Similar to the above Batch Upload Process, the Upload Files Template (ex. Participant Assessment), utilizes field names used in the actual assessment as column headings.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	#First Name	#Last Name	Grade	Assessment Date	Reading	Reading S	Reading C	Math Con	Algebraic	Geometri	Progress	Efficiency		
2	Sam	Blatz	3	IOWA	4/1/2005	150	3	2	180	5	4 Fair	Errors;Messy		
3	James	Clinton	3	IOWA	4/2/2005	160	4	3	160	4	4 Good	Quick;Accurate		
4														

Note: For those assessments created as part of the DCROP, SSI will assist you in the creation of Upload Templates. You will need to populate them with the data you would like to upload.

3. Filling Out an Upload Template

By default, the software uses Demographic Check Settings to match Participants in the file to Participants in the system. It also uses Assessment Name AND Assessment Date AND Assessment Identifier (if used) selected above - optional). The reason for this “check” is to make sure the data being uploaded is connected to the correct participant record in ETO.

Because of this, it is important that you review your sites duplicate check settings when you are creating and completing the upload template. In most cases, your site’s Duplicate Check Settings have been set to look for exact matches on a given participant’s First and Last Names.

Note:

- To insert new Assessment responses, leave the "Batch Upload Action" column blank or enter "Insert". If you wish to update existing Assessments, enter "Update".
- Assessment should be defined within the ETO Software with elements matching to spreadsheet columns.
- The «**Assessment Name**» is a required column.
- Client Demographics set for 'Duplicate Check' are required columns also and should be preceded with #. If none of the demographics set for 'Duplicate Check' the «**#First Name**», «**#Last Name**», and «**#SSN**» are required. Again, in most cases your site has been configured to look at First and Last Names. SSN will not be used.
- Order of columns is irrelevant
- Assessment Non-Exclusive Choice Element Responses should be entered as ';' separated list

Once the upload template is completed, you should save it as a Comma-Separated-Values (*.csv) File

As with the Batch Upload Process, each line in the template resembles one record. In the above Participant Assessment template sample, each line would be used to upload a single participant assessment. It's also important that the data contained in the template matches what has been configured in the actual assessment (e.g. drop down choices, formatted fields like date fields, etc.).

RULE: Before uploading a Participant Assessment, the Participant records must exist in the system (or there is no place to attach the assessment record to)

Once the upload template has been filled out, email it to George Schott (SSI). Prior to sending the CSV file, remember to password protect it.

TIPS FOR ALL UPLOADS:

- Apostrophes cannot be uploaded (if any apostrophes are contained in the file - use find/replace to substitute apostrophes with blank spaces).
- Characters (apostrophes, ampersands, etc) used in names of programs and sites is not recommended.
- There is a limit of approximately 7,000 cells of data per upload. For example, a file may contain 35 columns (demographic elements, attributes, assessment elements, etc) and 200 rows (participants, entities, etc) or any combination that results in 7,000 or fewer cells. If the upload is performed late in the evening, it's possible that this capacity can be doubled. It's recommended that spreadsheets that contain more 7000 cells be divided.

4. Uploading the Template

Once the template has been filled out, and the contents have been double-checked for accuracy, you will be able to submit it to SSI, where a Technical Services Associate will upload the data into your site.

Summary of Upload Files Steps

The below table summarizes the general steps to be taken when using the Batch Upload functionality.

Step	Responsible
1. Create Batch Upload Template following the sample file as a guide	SSI will work with Site Administrators to assist them in creating the necessary upload templates
2. Complete Batch Upload Template (sample)	Site Administrator/Program Staff will complete template for 5-10 records (sample set)
3. Upload Data	SSI will upload sample set
4. Confirmation of Data Upload	Site Administrator/Program Staff will audit upload against sample template to confirm
5. Complete Batch Upload Template (full)	Site Administrator/Program Staff will complete template for remaining target records
6. Upload Data	SSI will upload sample set
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