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10.0.0 Importing and Exporting Data in NIRS - Disclaimer

For illustrative purposes, I will present the NIRS Learning Module topics using AUCD's --AAA Test Center for a co-located UCEDD + LEND, which contains only sample or demonstrative data.

Please note that the forms shown in the demonstration videos may differ from the online forms, as forms are updated each August based on federal guidance.

We recommend that you review the previous learning modules before continuing, as the "Importing and Exporting Data in NIRS" series builds on concepts introduced in earlier sections.
For additional guidance, watch the following instructional videos organized by topic:
For familiarizing yourself with the online forms in each Dataset:
For the Trainees Dataset:

- If you're new to the Trainees Dataset or need help accessing it, watch "Overview of the Trainees Dataset". This video explains what the dataset is, who uses it, and how to gain access.

- The videos titled "Adding New Long-/Medium-Term Trainee Records" and "Managing Existing Long-/Medium-Term Trainee Records" walk through accessing the Trainees Dataset online forms in NIRS.

For the Projects Dataset:

- If you're new to the Projects Dataset or need help accessing it, watch "Overview of the Projects Dataset". This video explains what the dataset is, who uses it, and how to gain access.

- The two videos "Adding New Project Records" and "Managing Existing Project Records" walk through accessing and managing project records in NIRS.

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- For guidance on managing funding from federal agencies and apportioning financial data across multiple years, watch "Managing "Core" Grants in the Projects Dataset" and "Apportioning Project Records Across Multiple Years".

For the Activities Dataset:

- If you're new to the Activities Dataset or need help accessing it, watch "Overview of the Activities Dataset and Core Functions". This video explains what the dataset is, who uses it, and how to gain access.

- Eight (8) videos walk through each activity core function form. To learn how to access online forms in each activity core function form, watch the corresponding video:
  - "Adding New Records with Activity Core Function" Continuing Education/Community Training" in the Activities Dataset",
  - "Adding New Records with Activity Core Function "Demonstration Services" in the Activities Dataset",
  - "Adding New Records with Activity Core Function" Direct Clinical Services/Model Services "in the Activities Dataset",
  - "Adding New Records with Activity Core Function "Interdisciplinary Preservice Preparation" in the Activities Dataset",
  - "Adding New Records with Activity Core Function "Other Direct/Model Services" in the Activities Dataset",
  - "Adding New Records with Activity Core Function "Performing Research or Evaluation" in the Activities Dataset",
  - "Adding New Records with Activity Core Function "Product Development and Information Dissemination" in the Activities Dataset", and
  - "Adding New Records with Activity Core Function" Technical Assistance" in the Activities Dataset".

- The video titled "Managing Existing Activity Records" walks through the process of updating existing activity records.

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For the Products Dataset:

- If you are new to the Products Dataset or need help accessing it, begin with "Overview of the Products Dataset and Product Material Types". This video explains what the dataset is, who uses it, and how to gain access.

- Fifteen (15) videos walk through each product material type form. To learn how to access online forms in each product material type, watch the corresponding video:
  - "Adding New Records with Product Material Type "Academic Course Development" in the Products Dataset",
  - "Adding New Records with Product Material Type "Book" in the Products Dataset",
  - "Adding New Records with Product Material Type "Book Chapter" in the Products Dataset",
  - "Adding New Records with Product Material Type "Conference presentations and posters presented" in the Products Dataset",
  - "Adding New Records with Product Material Type "Distance Learning Modules" in the Products Dataset",
  - "Adding New Records with Product Material Type "Doctoral Dissertation or Master's Thesis" in the Products Dataset",
  - "Adding New Records with Product Material Type "Newsletters" in the Products Dataset",
  - "Adding New Records with Product Material Type "Other" in the Products Dataset",
  - "Adding New Records with Product Material Type "Pamphlets, Brochures, or Fact Sheets" in the Products Dataset",
  - "Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals Published/In Press" in the Products Dataset",
  - "Adding New Records with Product Material Type "Peer-reviewed publications in scholarly journals submitted" in the Products Dataset",

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- "Adding New Records with Product Material Type "Press Communications" in the Products Dataset",
- "Adding New Records with Product Material Type "Reports and Monographs" in the Products Dataset",
- "Adding New Records with Product Material Type "Tools or Toolkits" in the Products Dataset", and
- "Adding New Records with Product Material Type "Web-based products" in the Products Dataset".

- The video titled "Managing Existing Product Records" walks through the process of updating existing product records.

Each NIRS Learning Module section contains information on Standard Reports available for each Dataset. Each video demonstrates how to use the Standard Reports to review your data and identify records that may need attention:

- For additional information on reports available in the Trainees Dataset, watch "Overview of Standard Reports in the Trainees Dataset".

- For additional information on reports available in the Projects Dataset, watch "Overview of Standard Reports in the Projects Dataset".

- For additional information on reports available in the Activities Dataset, watch "Overview of Standard Reports in the Activities Dataset".

- For additional information on reports available in the Products Dataset, watch "Overview of Standard Reports in the Products Dataset".

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Finally, to gain administrative access, watch either video titled "Relationship between NIRS and Reporting Requirements for UCEDDs" or "Relationship between NIRS and Reporting Requirements from the Federal Funder".

If you have any questions, please message NIRS@aucd.org.

10.1.0 Export Tool

10.1.1 Purpose and Overview of the Export Tool

Welcome to the video of the "Importing and Exporting Data in NIRS" section of the NIRS Learning Modules titled "Purpose and Overview of the Export Tool". This video will discuss what the Export Tool is, what it can be used for, and how to manage export files.

The Export Tool allows users to extract data from the NIRS database. Data from specific Datasets, or "tables," can be saved to an Excel spreadsheet.

The Export Tool may assist in:

1. Using the Export Tool, you can extract all the data entered into NIRS over the years and move it to a different system—for example, REDCap or Microsoft Access.

2. The Export tool can also be used to move data in bulk from a prior year to the current year of data collection.

Administrative access is required to access the Export tool. If you have administrative access, the Admin section will be viewable in the navigation menu when logged into NIRS.

The Export tool is accessed by clicking on the "Export" option in the Admin section navigation menu.

There are three columns in the Export Tool screen. From left to right, they are:

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1. The "References" column contains resources helpful for exporting and reading the export files.

   The "Table and Field Definitions" resource lists each field, as they appear in the export file header, along with the field type, such as whether it has a character limit, is numerical-only field, or it is a list or dropdown menu.

   The "Code Table Definitions" lists abbreviations or code numbers that are used to represent options in NIRS dropdown menus or check-all-that-apply fields.

2. The middle "Export Options" column lets you select the year of data collection you want to export data from. The default display is the current fiscal year. To select a different year, click the box and select the desired year from the dropdown.

   There is also an "All Years" option if you need a data export from year 2006 to the current fiscal year.

3. The "Export" column allows you to select one Dataset at a time, which exports an Excel sheet containing the data entered for the selected year of data collection.

   Options include:
   - **Trainees** – to download data from the Trainees Dataset Main trainee record. Trainee main records are viewable in the Trainees Dataset “Manage Long/Med Term Trainees” screen under the “Manage Main rec” column.
   - **Trainee Years** – to download data from the Trainees Dataset Annual/Year trainee record. Trainee annual/year records are viewed in the Trainees Dataset “Manage Long/Med Term

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Trainees" screen under the "Manage Annual rec" column.

Please note the trainee's main and annual/year records in the Trainees Dataset are two distinct and separate forms. You need to export both the "Trainees" and "Trainee Years" files to have the full trainee record.

- **Projects** – to download data from the Projects Dataset. Project records are viewed in the Projects Dataset "Manage Projects" screen.
- **Activities** – to download data from the Activities Dataset, all core functions. Activity records are viewed in the Activities Dataset "Manage Activities" screen.
- **Products** – to download data from the Products Dataset, all material types. Product records are viewed in the Products Dataset "Manage Products" screen.
- **Trainee Survey (UCEDD/LEND, LEND)** – to download the completed/received LEND and UCEDD + LEND former trainee alumni surveys. Surveys are viewed in the Trainees Dataset "List Survey" screen.
- **UCEDD Survey** – to download the completed/received UCEDD-only former trainee alumni surveys. Surveys are viewed in the Trainees Dataset "List Survey" screen.
- **PPC Survey** – to download the completed/received PPC former trainee alumni surveys. Surveys are viewed in the Trainees Dataset "List Survey" screen.
- **LEAH Survey** – to download the completed/received LEAH former trainee alumni surveys. Surveys are viewed in the Trainees Dataset "List Survey" screen.

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- **DBP Survey** – to download the completed/received DBP former trainee alumni surveys. Surveys are viewed in the Trainees Dataset “List Survey” screen.

When exporting former trainee surveys, ensure that you select the correct survey option based on the trainee's engagement in your training program. For example, if a co-located UCEDD + LEND sends out the UCEDD-only survey to its UCEDD trainees, you should select the option for UCEDD surveys. If you want to export surveys from UCEDD + LEND or LEND-only trainees, select the "UCEDD/LEND, LEND" option.

The exported file will be downloaded to your computer when you click the link for the desired Dataset.

If the file does not automatically open, check your downloads folder for the export file.

Let's do an example of exporting Projects (financial information) from the Projects Dataset.

If you want to export project records, follow these steps:

1. Click on the "Table and Field Definitions" and "Code Table Definitions" resources under the Reference column.

   These will be helpful when interpreting the export files.

2. In the "Export Options" column, select the year(s) of data collection.

3. Under the "Export" column, click the "Projects" option to export data from the Projects Dataset.

   You will generate an Excel sheet with the selected data. Check your downloads folder if the file does not open automatically.

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4. Open the file and interpret responses.

   When you open the file, you will see headers listing responses to the online form. You will notice that some of the responses are abbreviated.

   For example, scroll to column CS and select "targetaudience" with no spaces. The header references the field in the online form in the Projects Dataset, "Target Audience". Responses in each record in column CS will be single or a combination of letter responses (e.g., S,P,F,G). For responses that allow multiple selections, each option is separated by a comma with no spaces. These letters are abbreviations for the values that appear in the online form.

   Let's look at the "Code Table Definitions" resource. Search for the "targetaudience" field header by pressing CTRL + F on your keyboard to open a search function.

   In the table, you will see each option mapped to its abbreviation.
   S = Students/Trainees
   P = Professionals and Para-Professionals
   F = Family Members/Caregivers
   G = General Public

   Code Table Definitions help you decode responses.

It is important to note:

1. NIRS is updated annually to align with federal guidance. As such, prior-year records may display options that are no longer visible in the online form.

2. NIRS data belongs to your Center/Program. Your data remains available to you year-round through the application online forms, reports, and the Export Tool.

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Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

10.2.0 Import Tool

10.2.1 Purpose and Overview of the Import Tool

Welcome to the video of the "Importing and Exporting Data in NIRS" section of the NIRS Learning Modules titled "Purpose and Overview of the Import Tool". This video will discuss what the Import Tool is and how to use it.

The Import Tool allows users to enter data in bulk into the various Datasets in NIRS, streamlining data entry processes.

Records are always entered into the current fiscal year of data collection. It is not possible to import records into prior or future year(s) of data collection.

Records can be imported into the four (4) Datasets:

- Products (all product material types)
- Activities (all core functions)
- Projects
- Trainees Dataset Main and Annual/Year Records, which are two separate import templates that must be used in tandem when importing records into the Trainees Dataset.

Administrative access is required to access the Import tool. If you have administrative access, the Admin section will be viewable in the navigation menu when logged into NIRS.

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The Import tool is accessed by clicking on the "Import" option in the Admin section navigation menu.

There are three columns in the Import tool screen. From left to right, they are:

1. The "Fields Mapping and definitions" column contains resources to help prepare data for the import process.

   There are two resources listed for each dataset:

   1) The "Full list of [Dataset] NIRS Fields: mapping database fields with online form fields" resource link.

      In that file, you will find a list of all fields, whether they are required or optional, their type (character limit, numerical only, whether the field is a list or dropdown menu), the values allowed for each field, and the corresponding fields in the online form. Keep this resource open when preparing the import templates so you can accurately interpret and record responses in each field.

      2) The "Full list of abbreviations and code numbers" resource lists all fields from the import templates and the corresponding values. The field type is also listed in a condensed format.

2. The middle "Templates" column contains the links to the templates to help you prepare data for the import. There are templates for each Program type (e.g., UCEDD-only, LEND-only, UCEDD + LEND, LEAH, or DBP) for each Dataset.

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3. The "Import" column is an action column. The "Choose File" button allows you to select the desired import file. The "Import" button will import the selected file.
   You must select a file first before clicking the "Import" button.

The module titled "Import Process Steps and General Tips to get data in NIRS" will cover the process that you should follow to import data to any Dataset.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

10.2.2 Import Process Steps and General Tips to get Data in NIRS

Welcome to the video of the "Importing and Exporting Data in NIRS" section of the NIRS Learning Modules titled "Import Process Steps and General Tips to get Data in NIRS". This video will walk through the steps you should complete in preparation for data import in NIRS and share practical tips to assist with importing data.

Keep in mind that records are always entered into the current fiscal year of data collection. It is not possible to import records into prior or future year(s) of data collection.

Administrative access is required to use the Import tool. If you have administrative access, the Admin section will be viewable in the navigation menu when logged into NIRS.

Before jumping into the import process, there is a resource available in NIRS that will provide a summary of all required fields and import options with mapping to the online form. To access it, navigate to the Admin section and select “Import”. Under the “Fields Mapping and Definitions” column, select the resource titled “Full list of [Dataset] NIRS fields: mapping

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database fields with online form fields". This will download an Excel file. If the file does not open automatically, check your downloads folder.

The mapping resource is split into four (4) sections. Each template is set up a similar way, so you can use the general format to read the mapping resources for other Datasets.

For example, open the mapping resource for Products. You will see the following:

1. The first section starts in Columns A1 through C2. This section provides instructions on using the resource and managing import templates.

2. The second section starts on E1, which provides the field header for each field as listed in the import template.

3. The third section starts from A3. In the Activities Dataset, there are eight (8) core functions which will be listed in this section. In the Products Dataset, you will see all fifteen (15) product material types. For Trainees (Main and Annual/Year records), and Projects, you will see only one row.

   Starting from E3, under each field header, you will see a green "R" for required fields and an "x" mark for corresponding optional fields.

4. In the final section, which is separated by a solid gray horizontal line, you will see information on the field type, e.g., numerical, multiple select or drop-down menu, character limits, etc., and import options with the display mapping to the online form.

You may use the resource to ensure that you use correct options during the import process.

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When importing records into NIRS, the process is as follows:
Step 1: Identify the Dataset you want to import data into.

Step 2: Access the Import tool in NIRS by selecting "Import" from the Admin section navigation menu.

Step 3: In the column "FIELDS MAPPING and DEFINITIONS", find the link to the resource file "Full list of [Dataset] NIRS fields: mapping database fields with online form fields".

Download that Excel file by clicking on the link. If the file does not open automatically, check your downloads folder.

Step 4: In the column 'TEMPLATES (and Instructions),' click the link for the applicable Dataset Template. For example, if you import Projects, click on the link next to the Projects Dataset section to view project import templates. The link will open a new window with the list of available templates. Find a template in the list that matches your Center/Program type. Download the Template Excel file by clicking on the link. If the file does not open automatically, check your downloads folder.

For example:

- UCEDD Centers should look for templates with 'template UCEDD, LEND' in the title,
- DBP Programs should look for templates with 'template DBP' in the title.

Each dataset has a unique setup for the list of templates.

For Products:

The NIRS Products Dataset has fifteen (15) Material Types. Each type has unique online forms with a unique list of fields. The import process supports

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mass upload only for data that has the same set of fields. Because of that, each material type has its own template.

On the template page, you will find fifteen (15) groups of templates; each group is dedicated to one material type. Download the Template that matches both the:

a) desired material type of your records, and
b) your Center/Program type.

If your records include multiple material types, group them by material type before importing them. Then use the correct downloaded import template for each material type.

For example, do not import records with the material type “Book” using the “Peer-reviewed Publications in Scholarly Journals Published/In Press” import template.

Instead:

- Import peer-reviewed journal articles that are published or in press using the “Peer-reviewed Publications in Scholarly Journals Published/In Press” template.
- Import books using the “Book” Products import template.

Using the correct template for each material type ensures your records are imported successfully.

For Activities:

The NIRS Activities Dataset has eight (8) Core Functions with unique online forms and a unique list of fields. The import process supports mass upload only for data that has the same set of fields. Because of that, each core function has its own Template.

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On the template page, you will find eight (8) groups of templates; each group is dedicated to one core function. Download the Template that matches both the:

a) desired activity core function of your records, and
b) your Center/Program type.

If your records include multiple core functions, group them by core function before importing them. Then use the correct downloaded import template for each core function.

For example, do not import records with the core function “Technical Assistance” using the “Demonstration Services” import template.

Instead:

- Import technical assistance or direct problem solving initiatives using the “Technical Assistance” template.
- Import demonstration services using the “Demonstration Services” Activity core function import template.

Using the correct template for each core function ensures your records are imported successfully.

For Projects:

There is one (1) template for all Center/Program types.

For TRAINEES (Main Records) and TRAINEES (Year/Annual Records):

Always import trainee main and annual/year records in tandem; start with TRAINEES (Main Records) and follow up with TRAINEES (Annual/Year Records). You need to have both files prepared before starting the import.

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This is because a correct trainee record consists of two parts: 1) a main record containing their personal contact information and demographics and 2) an annual/year record contains data specific to their training experience during the year. During the import, the system imports main record data. The database "remembers" all the data as long as there is no other transaction in the database. When you import the annual/year record, the system connects the main record with the annual/year record for each trainee. So, you want to import annual/year trainee data close to the time you imported the main trainee records, so there will be no "disturbance" between actions.

You may also open the NIRS online form for the imported data. For example, navigate to the Trainees Dataset and select “Manage Long/Med-term Trainees”. Click on the three dots and select edit under the “Manage Main Rec” column to view the trainee’s main record form, and/or click on three dots and select “edit” under the “Manage Annual rec” column to view the trainee’s annual/year record form. The fields in the template files generally follow the order of fields displayed in the online forms.

Step 5: Prepare data in the import template.

Step 6: With the import template complete, navigate to the “Import” screen in the Admin section. Locate the applicable Dataset for the desired records. Under the “Import” column, click the “Choose File” to bring us a pop-up window to select the desired import template.

Step 7: Click “Import” in blue. There are two outcomes:

If not successful, you will receive a list of items that need to be addressed. The error message will inform you of any errors in the import file, any required fields with missing data entry, and the location of the error in the import template, e.g., the field name and row number. Open the import file and make the changes to the import template. Attempt the import again.

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If successful, you will receive a message indicating that the records were successfully read into the system. You can navigate to the applicable Dataset in NIRS to review imported records.

Now let's move on to practical tips for getting data in NIRS.

1. As an alternative to the Import Process, you may consider using the use the "Save As New" feature.

   The "Save as New" feature exists in every Dataset and can be used to replicate existing records in the current fiscal year. To use the feature, navigate to the applicable Dataset, for example, Projects Dataset and select "Manage Projects" from the navigation menu. Locate the record on the form. Next to the record, select the "VIEW" option by clicking the three dots under the "Manage" column.

   There is a green "Save As" button in the top-right corner.

   Products and Activities will ask you to assign a new Material Type for the new product and a new Core Function for the activity.

   Existing record responses will be automatically filled in to streamline data entry. You must update the fields for the current year of data collection before saving the form. Additionally, you may need to add data for any new fields on the form to ensure date fields reflect data reported in the current fiscal year.

2. You may also use the "Export" tool in the Admin section to extract records from prior years. Data will be exported from the database. You may use values listed in the export file when preparing the import template.

Additionally, consider the following when importing records:

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- It is recommended to attempt a test import with only one to two records so it can be easily corrected before trying a larger import.
- Import templates have sample data entered in them. The sample data can be used to guide your process when entering all required fields.
- Once the template has been successfully prepared for import, be sure to remove the sample data rows before importing.
- The import process is used by many Centers/Programs as a time saving measure when importing a large quantity of records at once.
- Take each field in the import templates one at a time. The import process takes practice.
- You may want to have the online form open in NIRS open to walk through the form as you complete fields in the import template. This will assist with visualizing fields and form options.
- After successfully importing records, address any errors listed in the "Data Entry Error" Standard Report available in all Datasets and "Duplicates" Standard Reports available in the Trainees and Products Datasets for the applicable Dataset.
- Finally, AUCD is here to help if you get stuck. Message AUCD at NIRS@aucd.org with any questions.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

10.2.3 Demonstration of the Import Process in the Products Dataset

Welcome to the video of the "Importing and Exporting Data in NIRS" section of the NIRS Learning Modules titled "Demonstration of the Import Process in the Products Dataset". This video will demonstrate importing records in the Products Dataset.

The Products Dataset contains fifteen (15) forms to record deliverables specific to your Center/Program. In this video, we will demonstrate the

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import of products records for the material type “Peer-reviewed publications in scholarly journals Published/In Press.”

The goal of this demonstration is to share skills for using reference materials to compile the import file for successful import.

First, you need to find the right Template to use for the import process.

Select "Import" from the Admin section navigation menu. Scroll to the Products Dataset section.

Under the "Fields Mapping and Definitions" column, download the mapping resource titled "Full list of Product NIRS fields: mapping database fields with online form fields".

Then, under the "Templates" column, click on the "Products Template" link. There are fifteen import templates, one for each material type and one for each program type within each material type. Be sure to select the correct Template.

For our demonstration, if importing UCEDD/LEND "Peer-reviewed publications in scholarly journals Published/In Press" products, be sure to download the UCEDD/LEND template under the "Peer-reviewed publications in scholarly journals Published/In Press" section.

When importing data into the Template, you should be aware that:

a) Only products for the current year of data collection can be imported using the Import Tool.
b) Data entry should represent deliverables created between July 1 and June 30 of each year.
c) No duplicate titles are allowed. Make efforts to ensure that duplicate product records are not created. You may also use an Advanced Search in NIRS to search for records by name or title.

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Please note, if the mapping resource and import template files do not open automatically, check your downloads folder.

For demonstration purposes, the documents are displayed with a split screen. On the left, you will see the mapping document that walks through options for each field, and on the right side of the screen is the import template we will use to import product records.

One helpful tip when working with this resource is to hide rows for material types that you are not working with. For example, "Hide" the information for other material types except "Peer-reviewed publications in scholarly journals Published/In Press" so that you can only view required fields for the specific material type.

To do this in the mapping resource, click the rows in the spreadsheet. For example, rows three (3) to seventeen (17) have information on required or optional fields for each material type. To view only required and optional fields with "Peer-reviewed publications in scholarly journals Published/In Press", select rows three (3) through twelve (12) and fourteen (14) through seventeen (17). Right-click and select "Hide". You will now only see the row for "Peer-reviewed publications in scholarly journals Published/In Press" records.

We will walk through the products mapping resource and import template together for the "Peer-reviewed publications in scholarly journals Published/In Press" product import template.

Let's go field by field. Follow these steps:

- The first field is "ProductID". Referencing the mapping resource on the left, you can see that the field is required and that it is an integer field (whole number). It is recommended to provide unique ID's starting with ten (10) or above. You must provide an ID that has not already been assigned to an existing product record.

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In the import template on the left, enter 10 for the first product record in cell A2. If there is more than one record, continue the sequence: 11, 12, 13, etc.

- For the second field, "Program_Type", it is required and has a list of import options that should be copied and pasted into the import template. For example, if entering products associated with both your UCEDD and LEND, enter "UCEDD,LEND" as written. Format and spacing do matter.

- The next field, "Title," is listed as required for all material types with a 500 character limit. Enter a unique title for each product record. Records with an identical title in the same year of data collection are considered duplicates and must be avoided.

  If needed, include a sequence number (e.g., 1.1, which corresponds to the objective in the five-year work plan) or the date in the Title.

- The "Publication_Name" field is required for publications in press. The field has a limit of 500 characters. Provide the company name that the journal was published by.

- The "Author" field is required. You can enter any number of authors in the space provided. It is required and has a 500 character limit.

- The next four (4) fields have a list of options specific to the program type of the record(s). For example, if importing DBP records, provide responses under the “DBP_Type” field. At least one response is required between the "LEAH_type", "PPC_type", "LEND_type", or "DBP_type" fields.

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- The "apa_citation" field is optional. You can provide the APA citation for the published scholarly journal if desired.

- The "Publisher" field is not displayed for scholarly journals in press, so you can skip it.

- The "PublDate" field is required for scholarly journals published/in press. Provide the date that the scholarly journal was accepted by the publishing company.

- The next four (4) fields are required for the “Peer-reviewed publications in scholarly journals Published/In Press" material type. Provide the “volume” number, the “number” assigned to the publication in the scholarly journal that was published, “page” number(s) where the article can be found, and “supplement” detailing related topics. The "volume", "number ", "supplement", and "pages" fields have a limit of 30 characters. You may also enter zero (0) if not applicable.

- The "publisher_location" field is not displayed for scholarly journals published/in press, so it can be skipped.

- The "name_of_conference" is also not displayed for scholarly journals published/in press, so it can be skipped.

- The "materialTypes" field is required, and a list of import options is provided in the mapping resource. Enter "RJ" for material type "Peer-reviewed publications in scholarly journals Published/In Press" for all records.

- The "target_audience" field is required and multiple choice, as indicated by the "SET" field type. Copy and paste the desired options. For example, type "I,P" separated by a comma (,) and no spaces for

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the "Consumers/Families" and "Professionals" options.

- The "Description_SpecialFeatures" field is optional and functions as an abstract which will appear in the public search on the AUCD website. You can provide a brief description for the scholarly journal. It has a 500-character limit.

- The next field, "AlternativeFormats" is optional, and a list of options is provided. If the published scholarly journal is provided in multiple languages or formats, select the applicable options. More than one option can be selected.

  The "AltLangs" option is required if "Other" was provided for the "AlternativeFormats" field. It is a text box, and you must use options on the product online form.

  To find the desired option, navigate to the "Add Products" screen in the Products Dataset navigation menu. Click "Add" next to material type "Peer-reviewed publications in scholarly journals Published/In Press". Scroll to the bottom of the form and click on the "Language other than English" option in the "Alternative Formats" field. Find the desired option from the list and highlight it. Right-click, select "Inspect," and read the HTML. You may need to click on the dropdown arrow to read the whole label. For example, you can see that the response for the "Amish" option is "Amish," which should be copied and pasted into the import template as indicated by the text "Amish,</label>".

- The "Cost" field is optional and will allow up to two decimal places. Provide the cost in US dollars for the cost of the scholarly journal.

- The "ContactID" field is also optional, it must be a whole number, and has a five (5) character limit. This field pulls from the list of faculty/staff profiles in the Directory Dataset.

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To view the correct response to provide for this field, navigate to the "Manage Faculty/Staff Profiles" screen in the Directory Dataset. Locate the desired faculty/staff person from the list and select "View" or "Edit" by clicking on the three dots next to their record.

Read the website URL. You will see text that says "staffid=" followed by a five-digit (5) number. Copy and paste the five-digit (5) number code into the import template. For example, in the test Center, the URL reads "staffid=12463" for John Doe. Enter "12463" in the import template for the "ContactID" field.

- The "FYPubDate" field is required, and you must provide the fiscal year that the scholarly journal was published in the YYYY format.

- The "ContactURL" field is required for scholarly journals published/in press, and you can provide a URL if the scholarly journal is online. There is a 500-character limit.

  If a link is too long, use a truncation service such as TinyURL.com.

- The next five (5) fields, "keyword1", "keyword2", "keyword3", "keyword4", "keyword5", are optional and each have a 100-character limit to provide common phrases or buzzwords to help others locate the published scholarly journal in the Public Search.

  For example, for a scholarly journal documenting research on Autism, you might enter "Autism" in the first keywords field, and "Autism Spectrum" in the second keyword field. You can provide up to five keywords or phrases.

- The next five (5) fields, "bookauthor", "SubTypeID", and "SubTypeOther", "FrequencyOfDistributionID", and "FrequencyOfDistributionOther" are listed as not being on the form for

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material type "Peer-reviewed publications in scholarly journals Published/In Press" so you can skip them.

- The "dissemination_vehicle" field is multi-select and required for published scholarly journals. Provide the method of dissemination from the list of options provided in the mapping resource.

  For example, enter “T,C” to indicate the published scholarly journal was disseminated via TV/Radio Interview and Conference Presentation.

- The "Contributing_Author" is required and has a 500 character limit. Type in individuals who contributed to the publication.

- The "number_subscribers" field is listed as not being on the form for material type "Peer-reviewed publications in scholarly journals Published/In Press" so you can skip it.

- The "quantity" field is optional and must be a whole number. You can provide the number of copies for each scholarly journal that your Center/Program has disseminated.

- Each Dataset also has up to ten (10) optional fields that can be added to each form for internal purposes. Not all Centers/Programs have created them in each Dataset, though you may need to add them into the import template if it is a required field on the form. These Custom fields always appear at the bottom of the form.

  If your Center/Program has a custom field in the Products record form, there is a simple trick to add the field header for the import template.

  In NIRS, navigate to "Add Products" from the Products Dataset navigation menu. Click "Add" next to the desired material type. This

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will open a fresh form. Scroll to the bottom of the screen and locate the custom field at the bottom of the form.

Highlight the field header on the screen and right-click to bring up a list of options. Select "Inspect" to pull up the HTML code. There will be a set of dropdown menus in the upper portion you can use to read the HTML on the back end. For example, "Reviewed and approved by" is a custom field in the test Center. By clicking on the "Inspect" option from the right-click options, the pop-up window reads "<label for=" Reviewed and approved by" aria-label=" Reviewed and approved by">* Reviewed and approved by</label>". This means that the label is "Reviewed and approved by", so you can type it as a header into the import template and then enter the response for each record in the import template.

Once you've finished entering records into the import template, be sure to save the file in a location where you can easily identify it.

In the Admin section, select "Import" from the navigation menu. Scroll to the section with the Products Dataset import options.

Import the product import template file. Under the "Import" column, click the "Choose file" button and select the import template from the navigation menu. Click the "Import" button.

If there are errors, the system will prompt you to fix them. You will receive an error message with details on where the error occurred in the file, which field, and what needs to be corrected. Be sure to read the error message carefully. Return to the Template and make the changes. Try to import the file again. If all errors are resolved, the system will indicate that the records have been read.

Congratulations! You can now review the imported product records in the Products Dataset. They will be listed under the "Manage Products" screen.

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Be sure to run the "Data Entry Error" and "Duplicates" Standard Reports in the Products Dataset to ensure that no fields require corrections and no duplicates were created.

Thank you for watching this training video. For questions or suggestions to improve AUCD's Data Coordinator Orientation Modules, please reach out to NIRS@aucd.org.

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