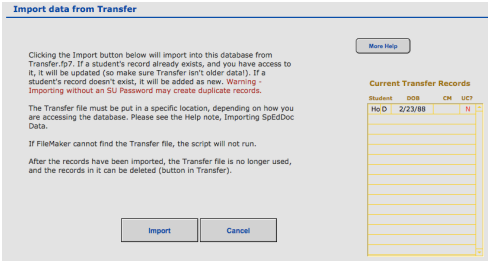
Topic: SpEdDoc Import from Transfer on a Network
More Info: *SpEdDoc 10 Administration* (SpEdDoc.org)
Audience: SpEdDoc Managers
Date: August 20, 2011

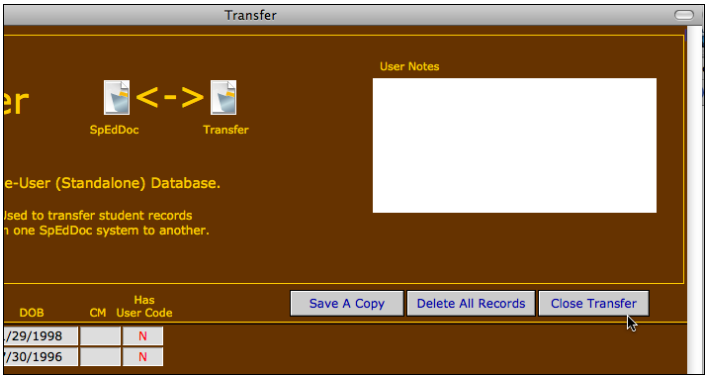
This quick guide is designed for using the Transfer process while connected to SpEdDoc on a server from FileMaker Pro installed on your local computer. If you do not have FileMaker Pro on your computer and instead connect through Terminal Services (Remote Desktop Client), see special instructions in the *SpEdDoc 10 Administration* guide.

To import data into SpEdDoc when the data was exported with the *exporting for new case manager* box checked (the standard way to exchange records between SU/SD's):

- Quit FileMaker.
- If the Transfer file you received was compressed (e.g., zipped), decompress it.
- If the file you received was renamed, e.g., TransferRB, restore the original name, i.e., Transfer.
- Put the Transfer file you received in a folder precisely named *SpEdDoc Folder*. This folder must be located at the root level of the hard drive (C: drive for PC or Macintosh HD for Mac).



- Launch SpEdDoc with the *cm* or *manage* account and then enter the User Code for the new case manager and the SU/SD Password.
- Go to Student > Main Menu and select the *Import from* button (on the bottom right).
- If the Transfer file is from a different school year, you will be prompted to enter the Account Name and PW. For example, if SpEdDoc 10 is running on your server and the Transfer file is from SpEdDoc 9, enter Account Name *cm* and last year's *cm* Password.
- The *Import Data from Transfer* screen shows a list of the student records to be imported followed by "N" in the UC column (confirming that the records had been exported for new CM). Click *Import*.



- When done, click OK and Close Transfer to return to Main Menu.
- Click the List View button to view the imported student records. The CM identity reflects the User Code that was entered in Begin.
- Navigate to Main Data and verify that your SU/SD is in the Org ID field on Main Data for each record (if not, immediately select your Org ID to ensure future access to the record with your SU/SD PW). Update the Facility, Town, CC Status, Status, and clear the Exit Reason, as needed.