Step 8: Application Data Transfer Cycle

Background

Application Data Transfers are done to import *Payment Assistance Applications* to CSD's CORE database. Each application submitted is validated and is assigned a status by CORE. Applications marked as *"Complete"* will be processed for payment and do not require any further action. Applications marked as *"Working-Deficient* or *Rejected"* do not meet all the validations in CORE, and will need to be corrected in ServTraq before re-transfer(possibly).

8.1. Generate the Transfer File

- A. Open the *Application Data Transfer* screen in ServTraq. Click **Select All** unless *Conditional Considerations*¹ guide this step otherwise.
- B. After selecting the applications to transfer, click **Generate Transfer File**. A message appears informing you the *Transfer File* is being generated. **Do not close/exit the screen, or your transfer file will be lost.**

🖉 Select All	Select None	\$	Generate Transfer File	🔗 Regenerate Pr	evious Tra	nsfer 🛛 🔞	Refresh List	🖹 Export List 🔹	
	Account Number	Ψ	Age 3 to 5 🛛 🖓	Age 6 to 18	۴	Agency Coo	de 9	Agency Control Code	ΨA
	07164097045)	0	60407		2786	531
	05670651982)	0	60407		2787	796
	81353905979		()	0	60407		2788	308
	51832354073		()	0	60407		2788	309
	40701656643		()	0	60407		2788	310
	03900568936		()	0	60407		2788	811
	76624110110		()	0	60407		2788	312
	68177200018		()	0	60407		2788	313
	11160507775		()	0	60407		2788	314
	44645101948		()	0	60407		2788	315
	02377016734		()	0	60407		2788	320

¹ Conditional Considerations are changes in work environment scenarios that cause operations to shift. Any column can be filtered to only display applications that meet the criteria selected. For example, use the *Program Code* column filter to only view applications for a specific program.

C. Once the file downloads, **Open** the file and click **Enable Editing** on the Excel spreadsheet.

ou want to open or	save 60407-2-	13-2014.xml (1.24 MB)	from servtraqazur	re.com?			Oper	n	Save	•	Cancel
	Treased	De se la vert	Freedor	Data	Basiass	View	Accelent	~	0		

Warning:

Make sure your default browser is set to "ASIlow all pop-ups from ServTraq".

When generating a transfer from Chrome, a second window will open with the download file. Once the file is saved to your network, you must close that second window to close the loading icon.

44645101948	0	0	60407	278815	
223770 📀 Untitled - Google Chrome	_	\times	50407	278820	
D23770 (i) about:blank		 	50407	278821	
500802		 	50407	278823	
753959			50407	***	1
422852			50407	Retrieving ApplicationsPlease Wait	
146342 Show all			50407	278828	
384882			50407	278829	
18798968485	0	0	60407	278831	

8.2. Save the Transfer file in the Network

A. Save the Transfer file (File→Save As) in the designated folder. The file name is automatically generated with the Agency Code+Date Exported (i.e. 60407-01-23-2014). Save the file type as "Excel Workbook".

X Save As							×
← → • ↑ □	> This PC > Desktop			v ē S	earch Desktop	,	ρ
Organize 🔻 Ne	v folder						?
✓ ✓ Quick access Desktop Downloads Documents Pictures Xmits_2018 Xfers2018 Xfers2018 Microsoft Excel ✓ OneDrive ✓ OneDrive This PC	Name ChangeRequest Dups EOW ThirtsB3038_Init_Comparison_20180224_JG TrainingLibraryList	Date modified 3/16/2018 9:35 AM 3/2/2018 2:04 PM 3/16/2018 11:40 AM 2/26/2018 10:49 AM 7/26/2016 3:37 PM 3/19/2018 3:38 PM	Type File folder File folder File folder Microsoft Excel W Microsoft Excel W	Size 10 KB 15 KB 11 KB			
File name:	UADataTransfer_2018-03-19T15_53_00						~
Save as type:	Excel Workbook						~
Authors:	Jones, Mark@CSD Tags: Add a Save Thumbnail	tag	Title: Add a ti	tle			
∧ Hide Folders			1	Tools 👻	Save	Cancel	

8.3. Log into CORE and Import the File

A. Log into CORE (<u>https://core13.csd.ca.gov</u>) and enter your username, password, and click **Sign In**.

Type yo	our user name ar	nd password.	
	User name:	csdnet\60407Jgarcia	Example: Domain\username
	Password:	•••••	

On the Navigation Pane click: Agency Workplace>Imports>Import D

← → 🅢 https://core13.csd.ca.go	v/main.aspxf	#375930288 🔎 🗕 🔒	C Imports My Ir	mports - Mic	r ×					
File Edit View Favorites Tools	Help									
Microsoft Dynamics CRM	~ f t	AGENCY WORKPLA	✓ Imports ✓						() Create	-
CSD Agency Workplace		Agency Work	place							
DASHBOARDS ⊻	REPORTS	× [MPORTS	¥	UA DATA TRANSFERS	×	APPLICATIONS	¥		¥
Import Name		Status Reason Suco	cesses Partial Failure	es Errors	s Total Proc Created	d On ↑	Created By			

B. Click **Choose File** to browse for the transfer file generated in step 2.



C. Locate your transfer file and click **Open**.

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1 Ouishaaaaa	Name	Date modified	Туре	Size		
Quick access	UADataTransfer_2018-03-19T10_05_03	3/19/2018 10:01 AM	Microsoft Excel W	56 K	B	
Desktop 🚿	UADataTransfer_2018-03-16T09_53_30	3/16/2018 9:50 AM	Microsoft Excel W	27 K	В	
🕂 Downloads 🛛 🖈	UADataTransfer_2018-03-16T09_51_41	3/16/2018 9:48 AM	Microsoft Excel W	312 K	B	
📋 Documents 🛛 🖈	UADataTransfer_2018-03-08T09_44_29_SF	3/8/2018 9:41 AM	Microsoft Excel W	30 K	B	
📰 Pictures 🛛 🖈	UADataTransfer_2018-03-08T09_39_52	3/8/2018 9:36 AM	Microsoft Excel W	263 K	B	
📕 Xmits_2018 🛛 🖈	UADataTransfer_2018-03-08T09_37_47	3/8/2018 9:34 AM	Microsoft Excel W	29 K	B	
Xfers2018 🖈	UADataTransfer_2018-03-02T14_22_05	3/2/2018 2:20 PM	Microsoft Excel W	89 K	B	
	UADataTransfer_2018-03-02T14_18_45	3/2/2018 2:16 PM	Microsoft Excel W	178 K	B	
Sector Contraction Contractico	UADataTransfer_2018-02-23T11_18_09	2/23/2018 11:15 AM	Microsoft Excel W	50 K	B	
This PC	UADataTransfer_2018-02-23T11_11_29SF	2/23/2018 11:08 AM	Microsoft Excel W	31 K	B	
	UADataTransfer_2018-02-23T11_02_29SF	2/23/2018 10:59 AM	Microsoft Excel W	30 K	B	
🚔 WD Passport Studio (UADataTransfer_2018-02-23T10_54_49	2/23/2018 10:52 AM	Microsoft Excel W	94 K	B	
Network	UADataTransfer_2018-02-16T15_03_04	2/16/2018 3:00 PM	Microsoft Excel W	26 K	B	
	UADataTransfer_2018-02-16T13_54_04SF	2/16/2018 1:51 PM	Microsoft Excel W	53 K	B	
	UADataTransfer_2018-02-16T13_46_54	2/16/2018 1:44 PM	Microsoft Excel W	153 K	B	
	M IIADataTransfer 2018-02-09T16 20 19	2/9/2018 4·20 PM	Microsoft Evcel W	486 k	R	
File na	ime:			~	All Files	~

D. From the *Upload Data File* window, click **Next**. Click **Submit** to import the file and click **Finish**.

•	Beview Settings and Import	lata	🕜 Help
Select a data file to import into Microsoft Dynamics CRM.	icerew sectings and import of		• = • •
To upload a new file, remove the file that is already enclosed.	This action will update existing reco	rds, and, if required, create new records.	
	Review the default settings, make the ne	cessary changes, and submit the data for import.	
Data file name:	 Duplicate detection is not enabled 		
Choose File No file chosen Supported file types: XML Spreadsheet 2003 (xml) .csv. txt. xisx and .zip	Salart Owner for Imported Parords		
	La Julie Garcia	÷ 🗔	
Enclosed File: UAData (ransfer_2018-03-19110_05_03.xisx Remove	This user will own the imported record information or if the records cannot be	s if the records do not contain owner assigned to the specified owners.	

8.4. Monitor the Import

A. From the *Imports* screen, monitor the file until the *Status Reason* column reads "Complete".
 Click the *Refresh* icon on the far right to update the file status. Once the file reaches a "Complete" status. The total number of *Successes* should equal the *Total Processed* number. Compare the number of *Successes* to the number of transferred records.

Workplace 🛛 🖓 🖳 🗸	Imports All Imports -			Search fi	or records	
4 My Work	Import Name	Status Reason	Successes Errors	Partial Failures	Total Proc	Created On 👻
Dashboards	60407-1-23-2014.xml	Completed	346	0	0 346	1/23/2014 1:40
Duplicate Detection	60407-9-24-2013 (2).xml	Completed	1	0	0 1	1/13/2014 9:47
Imports	60407-12-31-2013 (3).xml	Completed	1	0	0 1	12/31/2013 2:0
🔮 Reports	60407-12-31-2013 (2).xml	Completed	2	0	0 2	12/31/2013 1:0

B. Run the Deficiency-Rejection Report in CORE to identify any records needing correction.

Microsoft Dynamics CRM 🗸	▲ AGENCY WORKPLA → Reports →		
EXPORT TO EXCEL	D		
★ CSD/Agency Report	orts ~		
✓ Name ↑	Description	Report Type	Modified On
Contract Allocation Expenditure Rep	Displays UA and WPO Allocations/Expenditures by $\ensuremath{Provid}\xspace$	Reporting Services Report	2/2/2018 6:05 AM
Customer Application Details	Ver. 11.22.16 provides Customer Application Details for se	Reporting Services Report	2/2/2018 6:05 AM
Deficiency - Rejection Report v2	Ver. 11.22.16 provides Rejected or Deficient Records V1	Reporting Services Report	2/2/2018 6:05 AM
Detuned Developte (Mexico et al.			