

Transfer Virginia & Credits2Careers Data File Management Procedures

Instructions for Data Managers

August 23, 2023

Introduction:

Starting with the Fall 2023 data refresh, the process of using the SFTP server to upload files will no longer be supported. The new process uses functionality made available within the management menu of staff accounts for users designated as 'Data Manager' at a participating institution. This functionality allows Data Managers to upload files, download existing files, and delete old files to make it easier to manage their data files.

The functionality includes key validation tests that ensure that the data will load into the database. Warnings and validation errors are provided in an accompanying file within the directory where the files are uploaded. This allows Data Managers to review any warnings or errors and correct them right away instead of waiting for the data to be loaded and made available in the Staging environment for review. This should make the process of finding and fixing issues with the file faster and more efficient.

Please note that this functionality is available via the Transfer Virginia staging environment only and not the live environment.

Notes on Terminology:

There are three outcomes when a data file is uploaded:

- Successful upload. A message will be displayed informing you that the file was successfully uploaded and the file will appear in the directory with the filename and the date/time it was uploaded appended to it. This also means that it passed the validation tests relevant to that file.
- Warning. If a file fails non-critical validations, it will be still be accepted for upload but with warnings. This means that the file is structurally correct – file name, number of columns, etc. – but there may be data issues that affect how the data will appear in the portal. The warning messages will be available in a file within the directory where the files are uploaded with the same name and date stamp as the accepted file but appended with the word '_Issues'.
- Errors. **The file has structural issues that will prevent it from being uploaded into the database.** The error messages will be available in a file within the directory where the files are uploaded with the same name as the accepted file and appended with the data stamp and word '_Issues'.

Specific Instructions:

1. To upload new data files for the Transfer Virginia portal, the person uploading must have an institution account in the staging site <https://tva-staging.indtai.com/> and have the role of data manager checked. Contact your institution's portal manager or mcrenshaw@vccs.edu with any questions.
2. Access the staging site at <https://tva-staging.indtai.com/> and when you see a popup box such as the one shown below sign in with the username **pmt4tva** and password **J@rs0fJ@m**.

Sign in

https://tva-staging.indtai.com

Username

Password

[Sign in](#) [Cancel](#)

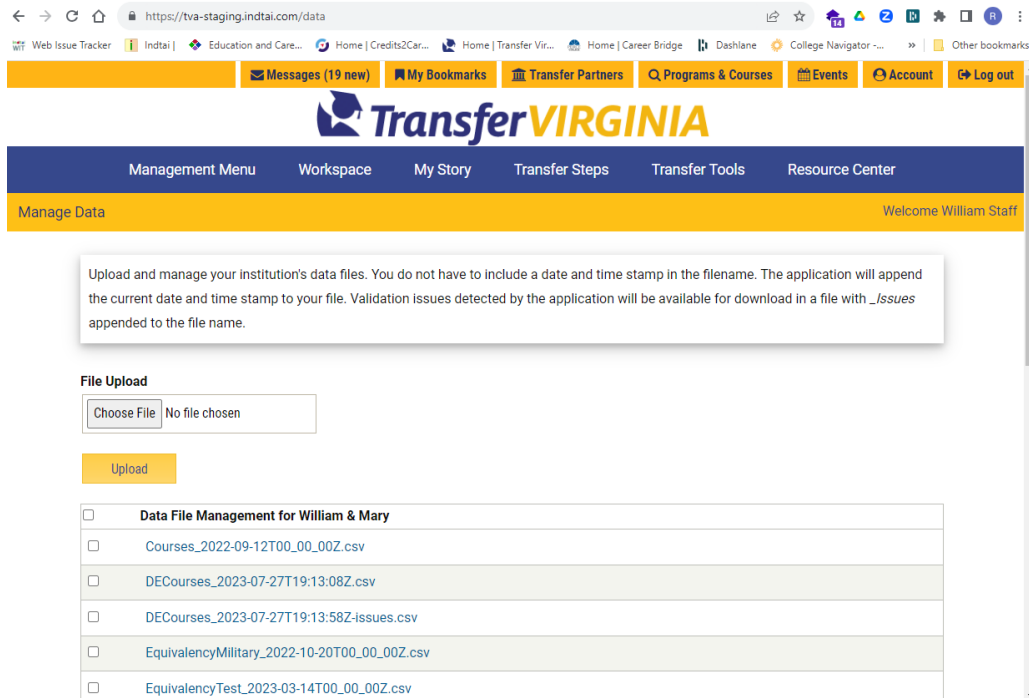
You will then be on the actual Transfer Virginia staging site.



3. Then Log In in the upper right with your personal username and password.



4. Go to Management Menu > Manage Data to see your college's list of current files.
 - a. You may download the current file or delete files at the bottom of this list.
 - b. You may upload new files at the top of the list.



5. **To upload new file**, find the file you want to add. **The file name does not need the date/time stamp as this will be added automatically when uploaded.** Then, watch for one of three messages.
- File was uploaded **successfully**. It passed all the initial criteria validation and the new file with the date/time stamp is now in the file directory.
 - Warning**. **File did upload** but with some errors. See the filename_date_issues in the file directory to view those errors. Please fix and upload again. The issue file shows what rows/columns have content that needs attention.
 - Error**. The **file did not upload** because of severe errors. Look at filename_issues (no date) to view those errors. Please fix errors and upload again. The issue file will show you what needs to be changed to allow upload – maybe wrong file name, wrong column title, or missing columns or rows.

A successful upload is shown below.

The screenshot shows the TransferVIRGINIA web application interface. At the top, there is a navigation bar with links for Messages (19 new), My Bookmarks, Transfer Partners, Programs & Courses, Events, Account, and Log out. Below this is a dark blue header with the TransferVIRGINIA logo and a navigation menu with links for Management Menu, Workspace, My Story, Transfer Steps, Transfer Tools, and Resource Center. A yellow banner below the header says "Manage Data" on the left and "Welcome William Staff" on the right.

A light blue confirmation box displays a checkmark and the message: "The file was uploaded with the name: Courses_2023-08-21T13:54:18Z.csv".

Below this, a white box contains instructions: "Upload and manage your institution's data files. You do not have to include a date and time stamp in the filename. The application will append the current date and time stamp to your file. Validation issues detected by the application will be available for download in a file with _Issues appended to the file name."

The "File Upload" section includes a "Choose File" button and the text "No file chosen". Below this is an orange "Upload" button.

A table lists the uploaded files:

☐	Data File Management for William & Mary
☐	Courses_2023-08-21T13:54:18Z.csv
☐	DECourses_2023-07-27T19:13:08Z.csv
☐	DECourses_2023-07-27T19:13:58Z-issues.csv

A warning message is shown below.

The screenshot shows the TransferVIRGINIA web application interface. The browser address bar displays `tva-staging.indtai.com/data`. The top navigation bar includes links for Messages, My Bookmarks, Transfer Partners, Programs & Courses, Events, Account, and Log out. The main header features the TransferVIRGINIA logo and a Management Menu with options: Management Menu, Workspace, My Story, Transfer Steps, Transfer Tools, and Resource Center. Below the header, a yellow bar indicates the user is logged in as Melody Crenshaw.

A blue notification box with a checkmark icon contains the following text:

- The file was uploaded with the name: `DECourses_2023-08-23T16:42:09Z.csv`
- There were issues with this file, an issue file named `DECourses_2023-08-23T16:42:09Z-issues.csv` has been created in your folder

Below the notification box, a grey box provides instructions: "Upload and manage your institution's data files. You do not have to include a date and time stamp in the filename. The application will append the current date and time stamp to your file. Validation issues detected by the application will be available for download in a file with `_issues` appended to the file name."

The File Upload section includes a "Choose File" button and a "No file chosen" status. An "Upload" button is located below the file selection area.

A table lists the uploaded files:

☐	Data File Management for Tidewater Community College
☐	<code>BAKEquivalencyTransfer_2023-03-14T18_54_14Z.csv</code>
☐	<code>Courses_2023-03-21T13_58_33Z.csv</code>
☐	<code>DECourses_2023-02-06T16_43_29Z.csv</code>
☐	<code>DECourses_2023-08-23T16:42:09Z-issues.csv</code>
☐	<code>DECourses_2023-08-23T16:42:09Z.csv</code>
☐	<code>EquivalencyIndustry_2023-03-16T16_49_22Z.csv</code>
☐	<code>EquivalencyMilitary_2022-09-15T14_39_00Z.csv</code>

An error response is shown below.

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A red notification box with an 'X' icon contains the following text:

- The file was not successfully uploaded. See errors below.
- Incorrect number of columns: 9

Below the notification box, a blue notification box with a checkmark icon contains the following text:

- There were issues with this file, an issue file named `DECourses_2023-08-23T18:00:55Z-issues.csv` has been created in your folder

Below the notification boxes, a grey box provides instructions: "Upload and manage your institution's data files. You do not have to include a date and time stamp in the filename. The application will append the current date and time stamp to your application will be available for download in a file with `_issues` appended to the file name."

The File Upload section includes a "Choose File" button and a "No file chosen" status. An "Upload" button is located below the file selection area.

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☐	<code>DECourses_2023-02-06T16_43_29Z.csv</code>
☐	<code>DECourses_2023-08-23T18:00:55Z-issues.csv</code>
☐	<code>EquivalencyIndustry_2023-03-16T16_49_22Z.csv</code>

Recommendations:

- If your college has multiple data managers assigned, identify who will upload/fix/maintain which files.
- Regularly, delete files that are no longer in use.