

How to Import/Export records from IEP 2002 to IEP 2005

While in IEP 2002, go to desired form, and then go to:

1. File
2. Import/Export
3. Export
4. “Export Records to” window will come up. Name file (be sure to notate which form if exporting more than one form) to place easy to locate on your computer (i.e. Desktop)
5. One at a time select most IMPORTANT fields you wish to keep (*the more fields you export the more difficult it is to import them into the correct fields in IEP 2005*). Use the “Move” button so that the ones you want are listed in right hand column.
6. Verify that “Character Set” is set to Windows or Mac (depending on what computer you are using)
7. Hit “Export” button
8. This will save a file in the location you selected, which can now be imported into IEP 2005

While in IEP 2005, go to desired form, and then go to:

1. File
2. Import Records
3. File
4. “Open file” window will come up
 - Navigate to file saved (file saved in “Export” above)
 - Select file
 - Hit “Open”
5. “Import Field Mapping” window will come up. In the left hand column are the fields you exported from IEP 2002, in the right hand column are names of fields in IEP 2005. By clicking on the double-sided vertical arrows (↕) you can move the FIELD NAMES up and down until the correct field name matches with ALL fields being imported.

HINT: Some records you are importing may have blank fields, while others may have more completed fields (less blanks). By using the double horizontal arrows (⇐ or ⇒) directly below the columns you can navigate through your records to insure proper matching of fields.

HINT: If you cannot find the correct location for a field to import into, you can click once on the grey arrow (➔) in between the columns and change it to a line (-), this will cause the computer to NOT import that particular field. Clicking on the line again will change it back into an arrow.
6. Once all fields have been lined up correctly, verify that all fields you are importing have the grey arrow next to them, adjust as necessary.
7. Verify that “Add New Records” is checked under “Import Action” – this will keep the computer from over-writing any records you may have already done.
8. Hit “Import” button.

These instructions were written and tested using the PC version of the software – the procedure may vary slightly for those teachers on a Macintosh.