Using and Understanding Extract Sets

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> ℹ **Reminder: Initializing Your Reference or Course Section Data**
>
> If you haven't initialized your reference data or course section data for the first time, you should do so during this step. Please see the previous page, Initializing Reference Data.

Extract sets are the core of the academic cycle, and mastering them is crucial. Imagine your SIS and 25Live as two great bodies of water separated by land. LYNX is a network of canals used by ships to travel back and forth between them. Extract sets are the locks on those canals that allow them to function. Extract sets control which ships are allowed to travel through the canals in either direction–and sometimes, they pause all travel altogether.

Every term, you will create the following:

- An **import extract set** to control which classes are imported to 25Live
  - **Date exceptions** to manage holidays and other special scheduling dates
  - **Extract set categories** to flag events with special categories in 25Live
- An **export extractset** to control which classes are exported back to the SIS
- If you use final exams, either:
  - An **exam import/export extract set** to control the movement of exams both ways between 25Live and your SIS
  - An **exam creation extract set** to define exams in 25Live (which will not be exported to the SIS)

> ℹ **Do I Have to do ALL THAT?**
>
> If this is your first time implementing 25Live and LYNX, you may feel overwhelmed by that list. Don't worry about doing everything at once! See the section below on When to Create Extract Sets for advice on how to do it.

Extract sets take the form of filters, similar to 25Live searches. If a section meets all of an extract set's criteria, we say it is "part of the set". Whenever you trigger an import for an extract set at the beginning of a term, all of its members are imported as events in 25Live. Throughout the year, whenever a section is updated in your SIS, it is automatically updated in 25Live–but only if it is a member of an active extract set.

Though several types of extract sets are described above, typically, they all use the same set of criteria because they deal with the same classes. Once you figure out the "special sauce" that makes your extract set work, you'll be able to re-use it in whatever context you want.

When to Create Extract Sets

First Time

Especially during your first round of implementing 25Live and LYNX, you should take it easy when creating your extract sets. Your goal is to minimize your workload and cut down on repetition when setting up nearly identical sets. Try following this plan:

1. Determine the Criteria for Your Import Extract Set

How do you determine what to import into 25Live and what to exclude? Use the Tips for Import Extract Sets to guide you.

2. Test Your Import Extract Set

Make sure that it has all the right classes. This is also an opportunity to verify that everything imports successfully. Follow the steps on Testing Your Extract Sets.

3. Add Date Exceptions and Categories

Once you've confirmed your import extract set is complete, add date exceptions and categories to it as needed. Now is also a good time to create your bindings. Don't forget to import the extract set again so that your changes and additions are conveyed to 25Live.

4. (Optional) Create an Export Extract Set

An export extract set (to bring location assignments back to your SIS) is not required immediately. You might choose to take a break and work on implementing the rest of the academic cycle. When you're ready, see Tips for Export Extract Sets.

5. (Optional) Setup Final Exams in LYNX

If you plan to use exams in 25Live, visit Tips For Final Exams in LYNX.

Later Terms

Once you have some experience, you can streamline this process.

1. Create Your Import, Export, and Exam Extract Sets

Create them all at the same time at the start of a term. Keep them inactive until you need them.

2. Add Date Exceptions

Add exceptions for your term's holidays and breaks once they are known.

3. Create Bindings

Once the term is built in your SIS, and you know which sections need to meet together, create bindings for them.

4. Activate the Import Extract Set and Bring Classes Into 25Live

5. When Ready, Activate the Export and Exam Extract Sets

You can even perform step 1 (and even step 2) for multiple terms at once: create enough extract sets right now to last

you for the next five years, and all you need to do is activate them at the proper times.

> ℹ️ **Ready to set up your first extract set?**
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> For instructions on how to create a new extract set, see Setting Up Extract Sets in LYNX.