



# **Import Students**

## **Aeries Client Version**

February 17, 2017

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## Overview

The **Import Students** form is accessed from the Client version of Aeries. The form will allow you to import student data from a temporary table within Aeries that can be created from an external file. This form is utilized in the same way that the **Import or Add Data into Aeries** is used but offers additional files that can be loaded. However, there are required fields and validations that take place.

For example, you can load an excel file or comma delimited file containing students from a feeder school into your database for pre-enrolling purposes that will be loaded into a temporary table. This data can then be imported into the **STU** table.

**Import Students**

Load Import

**Step 1 Choose the type of data**

Assign name to identify Source File

**Step 2 Choose the source of the data**

Path & Database:

Table/Query Name:

**Step 3 Choose how to generate the Student ID**

☒ Auto-Generate IDs ☐ Specify Starting ID Number

☒ Calculate Next Grade as 'Grade + 1'

**STU. = Import Fields or Type Text**

LN=	Last Name	
FN=	First Name	
MN=		
SX=	Sex	
GR=	Grade	
BD=	Birthdate	
PG=		
AD=		
CY=		
ST=		
ZC=		
ZX=		
TL=		
FW=		
FX=		
MW=		
MX=		
T1=		
T2=		
T3=		

☐ Sort by Field Name

Be sure to try loading on test data first! Clear ALL errors before loading into the live copy

This program will allow you to import data into the **STU** table from:

- Temporary tables within the current database
- Tables from an external database
- Excel (.xls) files
- Comma Delimited files (.csv)

**Note: Aeries recommends that you create a backup of your database prior to running the Import Students process.**

**Important:** Aeries has been advised that there is currently an issue with importing date fields when importing from an Excel file. Until the issue has been resolved, the following steps need to be taken for successful importing.

## **Correcting Date Issues Before Importing from an Excel File**

1. Check that all the dates were entered as text. To do this:

- a. Select the column header and right click
- b. Select **Format Cells / General** and click **OK**

K	K
BD	BD
08/10/2003	08/10/2003
11/14/2003	11/14/2003
11/13/2002	11/13/2002
04/25/2003	04/25/2003
12/5/2002	12/5/2002
12/27/2002	12/27/2002
6/17/2003	6/17/2003

The dates above, except one, are real dates. The numbers (37xxx) represent a date in Excel. They need to be converted as text.

2. Insert a column and write a formula like this: **=TEXT(K2,"mm/dd/yyyy")**, where K2, K3, K4, etc. represent the column and row of the date you want to fix.

K	L	K	L
BD		BD	
37843	=TEXT(K2,"mm/dd/yyyy")	37843	08/10/2003
37939	=TEXT(K3,"mm/dd/yyyy")	37939	11/14/2003
37573	=TEXT(K4,"mm/dd/yyyy")	37573	11/13/2002
04/25/2003	=TEXT(K5,"mm/dd/yyyy")	04/25/2003	04/25/2003
37595	=TEXT(K6,"mm/dd/yyyy")	37595	12/05/2002
37617	=TEXT(K7,"mm/dd/yyyy")	37617	12/27/2002
37789	=TEXT(K8,"mm/dd/yyyy")	37789	06/17/2003

3. Copy the new dates (in this case from column L) and paste them in column K. **Do not use the regular Paste.** You must choose **Paste Special / Value**.

4. Delete the formula column.

5. Repeat this for every date column.

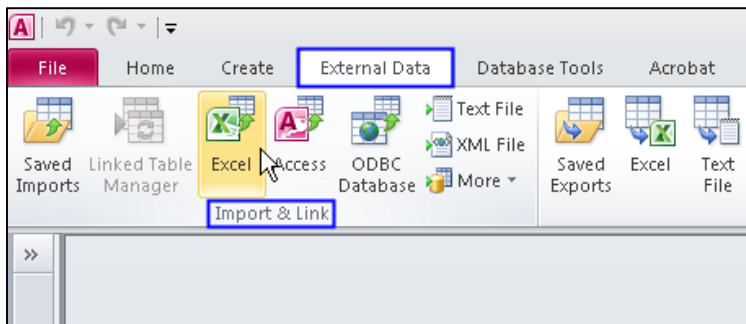
**NOTE:** If the dates were entered as **'08/10/2003 (apostrophe, then date)** when the original Excel sheet was created, the dates will format as text instead of a date format. Dates as Text format will import correctly.

## Creating the Temporary Table from an External File

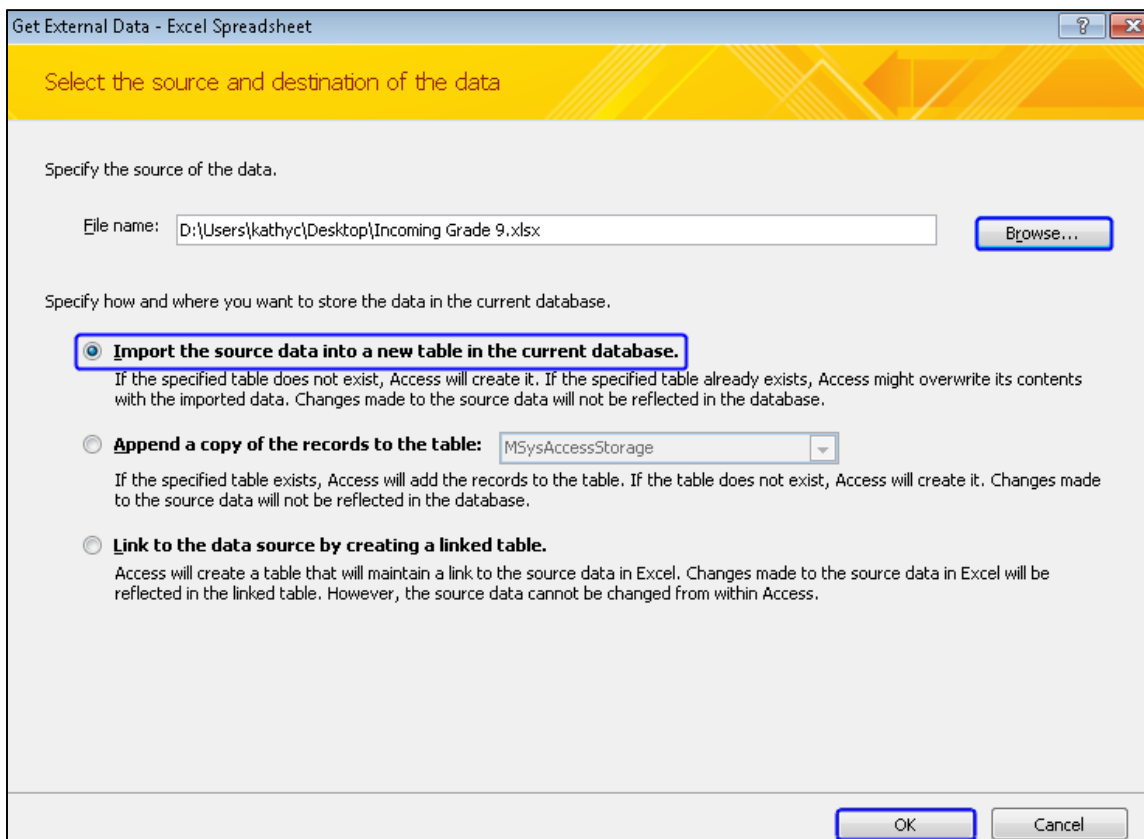
The following information is important in order to successfully **Import** the data.

- Some versions of Office will not accept an **.xlsx** file for importing. Verify which type of file your version of Office accepts, either **.xls** or **.xlsx**.
- There are 4 fields that are required to be included in the Excel file, **Student Last Name**, **Student First Name**, **Student Birthdate**, and **Student Grade Level**.
- The user must provide a name to identify the temporary table created in Aeries. If the table already exists, a warning will appear but the user has the option to overwrite.
- The files must have a header in order to be imported correctly.
- When the files are imported the user will have the ability to modify them if necessary.

With Aeries Client open, select **External Data** from the **Import & Link** toolbar at the top of your screen. Select **Excel** as the file type.



You will now need to point to your **Excel** file. Click on the **Browse** button to locate the file. Next, select the **Import the source data into a new table in the current database** option. Click the **OK** button when finished.



Your spreadsheet will now display. Check the box to select **First Row Contains Column Headings**. Click the **Next** button when finished.

Import Spreadsheet Wizard

Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

☒ First Row Contains Column Headings

	Student ID	Last Name	First Name	Middle Name	Sex	Birthdate	Grade	Parent/guardian	M
1	99300008	Adam	Diana	D	F	12/03/2002	8	Diane Adam	3
2	99300009	Adams	Cesar	C	M	11/07/2002	8	M/M C Adams	1
3	99300013	Alarcon	Diana	D	F	06/05/2001	8	M/M D Alarcon	1
4	99300019	Alleyne	William	W	M	05/01/2002	8	M/M W Alleyne	1
5	99300020	Alonso	Toyin	T	F	05/01/2002	8	M/M T Alonso	7
6	99300024	Amezcu	Walter	W	M	05/06/2002	8	M/M W Amezcu	8
7	99300025	Amigable	Dulce	D	F	09/01/2002	8	M/M D Amigable	6
8	99300026	Aramburo	Jonah	J	M	01/11/2002	8	M/M J Aramburo	1
9	99300032	Arias	Maribel	M	F	07/20/2002	8	M/M M Arias	1
10	99300034	Armendariz	Fernando	F	M	10/26/2002	8	M/M F Armendariz	1
11	99300039	Arzate	Alfredo	A	M	01/22/2002	8	M/M A Arzate	1
12	99300045	Bajorek	Christopher	C	M	07/15/2001	8	M/M C Bajorek	1
13	99300047	Balancad	Jackie	J	F	07/11/2001	8	M/M J Balancad	3
14	99300050	Banks	Borna	B	M	10/13/2001	8	M/M B Banks	1

Cancel < Back Next > Finish

The next screen will allow you to specify specific characteristics of the data you are importing. This is optional. Click **Next** to continue.

Import Spreadsheet Wizard

You can specify information about each of the fields you are importing. Select fields in the area below. You can then modify field information in the 'Field Options' area.

Field Options

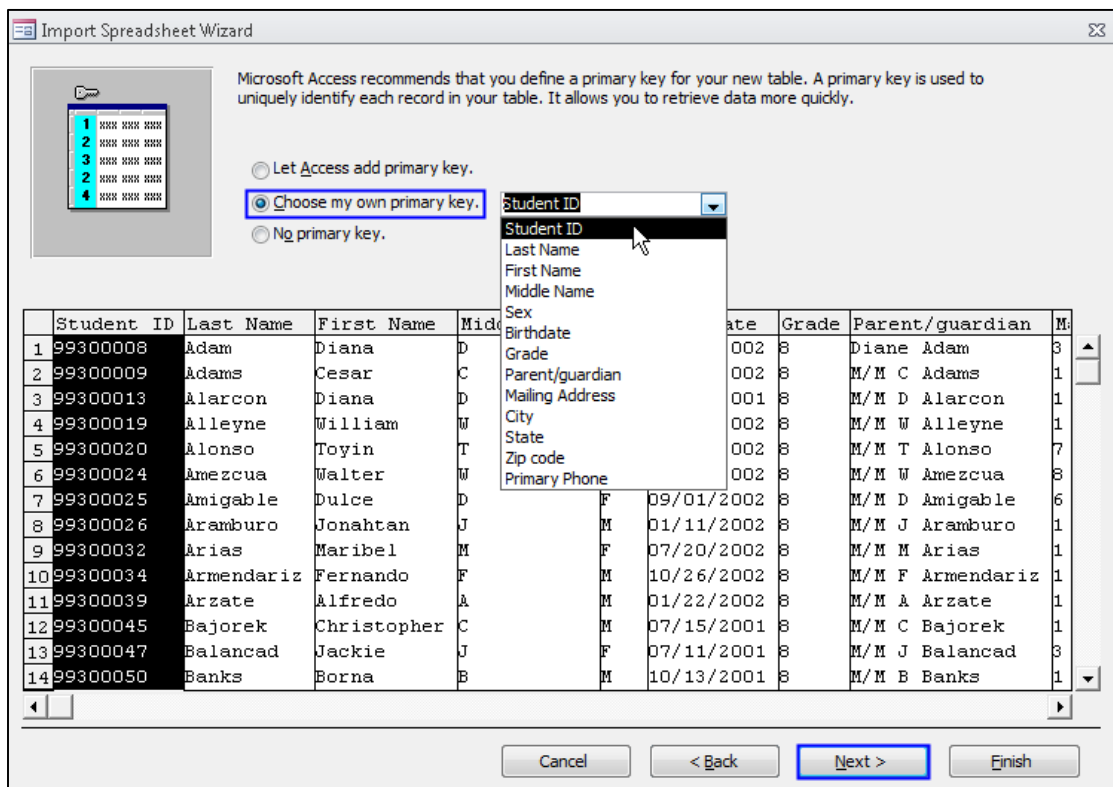
Field Name: Student ID Data Type: Double

Indexed: ☒ Yes (No Duplicates) ☐ Do not import field (Skip)

	Student ID	Last Name	First Name	Middle Name	Sex	Birthdate	Grade	Parent/guardian	M
1	99300008	Adam	Diana	D	F	12/03/2002	8	Diane Adam	3
2	99300009	Adams	Cesar	C	M	11/07/2002	8	M/M C Adams	1
3	99300013	Alarcon	Diana	D	F	06/05/2001	8	M/M D Alarcon	1
4	99300019	Alleyne	William	W	M	05/01/2002	8	M/M W Alleyne	1
5	99300020	Alonso	Toyin	T	F	05/01/2002	8	M/M T Alonso	7
6	99300024	Amezcu	Walter	W	M	05/06/2002	8	M/M W Amezcu	8
7	99300025	Amigable	Dulce	D	F	09/01/2002	8	M/M D Amigable	6
8	99300026	Aramburo	Jonah	J	M	01/11/2002	8	M/M J Aramburo	1
9	99300032	Arias	Maribel	M	F	07/20/2002	8	M/M M Arias	1
10	99300034	Armendariz	Fernando	F	M	10/26/2002	8	M/M F Armendariz	1
11	99300039	Arzate	Alfredo	A	M	01/22/2002	8	M/M A Arzate	1
12	99300045	Bajorek	Christopher	C	M	07/15/2001	8	M/M C Bajorek	1
13	99300047	Balancad	Jackie	J	F	07/11/2001	8	M/M J Balancad	3
14	99300050	Banks	Borna	B	M	10/13/2001	8	M/M B Banks	1

Cancel < Back Next > Finish

A primary key is useful when looking for records that may need to be corrected. If your external file contains the student's former ID number, the number can be used as the primary key by selecting to **Choose my own primary key**. If your file doesn't contain an the former ID number, select to **Let Access add primary key**. Click **Next** to continue.



Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

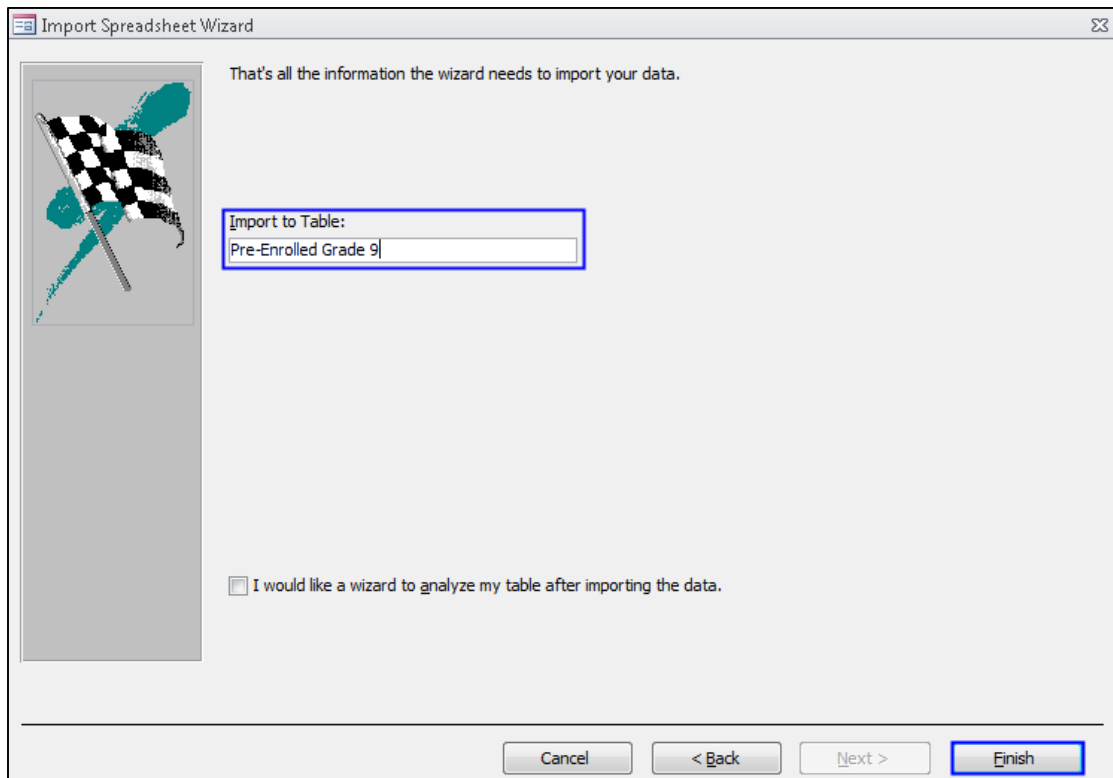
☐ Let Access add primary key.  
☒ Choose my own primary key.  
☐ No primary key.

Student ID

	Student ID	Last Name	First Name	Middle Name	Sex	Birthdate	Grade	Parent/guardian	M
1	99300008	Adam	Diana	D			002	Diane Adam	3
2	99300009	Adams	Cesar	C			002	M/M C Adams	1
3	99300013	Alarcon	Diana	D			001	M/M D Alarcon	1
4	99300019	Alleyne	William	W			002	M/M W Alleyne	1
5	99300020	Alonso	Toyin	T			002	M/M T Alonso	7
6	99300024	Amezcu	Walter	W			002	M/M W Amezcua	8
7	99300025	Amigable	Dulce	D	F	09/01/2002	8	M/M D Amigable	6
8	99300026	Aramburo	Jonahtan	J	M	01/11/2002	8	M/M J Aramburo	1
9	99300032	Arias	Maribel	M	F	07/20/2002	8	M/M M Arias	1
10	99300034	Armendariz	Fernando	F	M	10/26/2002	8	M/M F Armendariz	1
11	99300039	Arzate	Alfredo	A	M	01/22/2002	8	M/M A Arzate	1
12	99300045	Bajorek	Christopher	C	M	07/15/2001	8	M/M C Bajorek	1
13	99300047	Balancad	Jackie	J	F	07/11/2001	8	M/M J Balancad	3
14	99300050	Banks	Borna	B	M	10/13/2001	8	M/M B Banks	1

Cancel < Back Next > Finish

Next, you will need to give your new table a name. After entering the name, click on the **Finish** button.



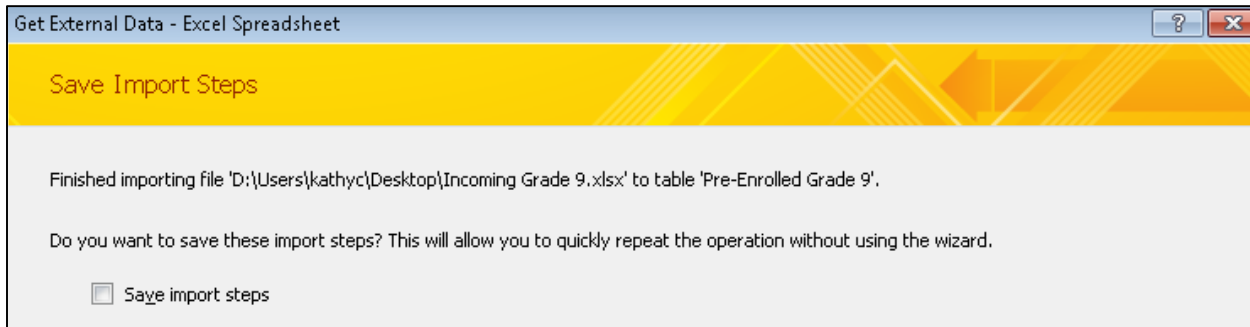
That's all the information the wizard needs to import your data.

Import to Table:  
Pre-Enrolled Grade 9

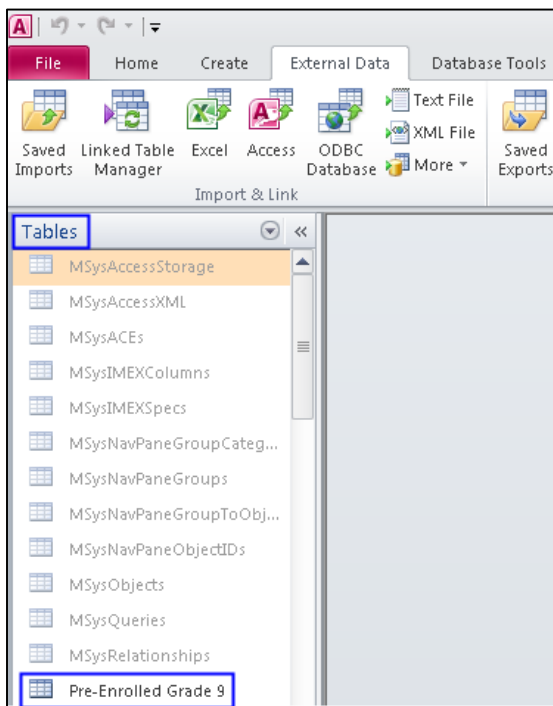
☐ I would like a wizard to analyze my table after importing the data.

Cancel < Back Next > Finish

A confirmation message will display indicating that the file has been imported. You can select to **Save the import steps** if desired.

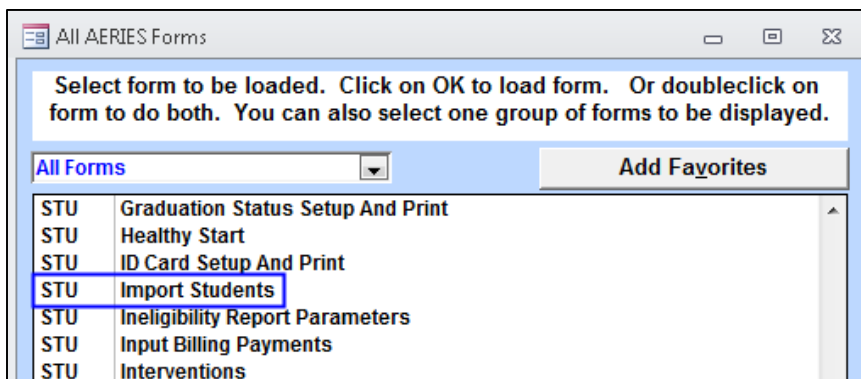


The new table can be accessed by expanding the **Navigation Pane** and selecting **Tables**.



## Import Students

The **Import Students** form is located in **View All Forms** from the **Aeries Client** version.



To start the import process for a new layout you **must** click the **New Layout** button at the bottom of the form unless you will be selecting a layout previously saved from the **Load Import** drop down. The entry fields will remain locked until one of these options has been selected.

It is important to note that there is no filtering for the file being imported into the **STU** table, such as selecting only active students to be imported and not import inactive students. **ALL students in the file MUST be imported.** There is no limitation on the fields being imported. For example, if the User Code fields are selected to be imported, there will be no validation that the user codes are correct.

**Step 1 – Choose the type of data** – Since you have imported the data into a temporary table within Aeries your selection in this area would be **Current database (sch.mde)**. When this option is selected Aeries will load the Table and Query Definitions from the database.

**Step 2 – Choose the source of the data** – The Path & Database field is grayed out since that information is not pertinent to this import. The table is already in Aeries. Click the drop down for **Table/Query Name** and select the temporary table you created. Now click on the **Load Input Fields** button.



**Step 3 – Choose how to generate the Student ID** - Select how the Student ID number will be generated. To **Auto-Generate ID's** the process will first check the **LOC.R2** field. If it has been set it will locate the District database and select the next available number in the **Next Perm ID** field from the **LOC** table. If the **LOC.R2** field is not flagged the process will then use the **Next Perm ID** field in the School database.

An option is also available to **Specify Starting ID Number**. A specific number can be entered into the field and when the records are created the process will begin with the number entered and increment for each student added.

There is also an option that will **Calculate the Next Grade as 'Grade + 1'**. This option will use the value entered into the **Student Grade** field, add 1 to the value, and enter the new value in the **Next Grade** field. For example, a student whose **Student Grade** is 8 will have a **Next Grade** value of 9.

**Note:** It is important to repeat that there are required fields that must be imported from the file into the **STU** table. The required fields to be populated are **LN, FN, BD, and GR**. If any of the required fields are missing data the student **will not** be imported. If the school is not Multi-Track the **TR (track)** and **NTR (next track)** fields will not be imported even if selected.

## Matching Data to Corresponding STU Fields

The next step is to match the data you are importing to the corresponding fields in the **STU** table. If you are not familiar with the Aeries table codes, you can click on the **Print STU Definition** button at the bottom of the form to print out all field codes for the **STU** table.

Be sure to try loading on test data first! Clear ALL errors before loading into the live copy			
<a href="#">Print STU Definition</a>	<a href="#">View Temporary Table</a>	<a href="#">Import or Add Data to Aeries</a>	<a href="#">EXIT</a>

Click the dropdown for the first field to be matched, a menu will display with the fields from the file you imported. Select the corresponding field name. In the example below, **LN** is being matched with **Last Name**. Continue until all data from your file is matched to the corresponding Aeries field. An option is available at the bottom of the form to change the **Sort** order of the input form. Selecting this option will sort the field names alphabetically.

STU. = Import Fields or Type Text	
LN=	Last Name
FN=	First Name
MN=	Last Name
SX=	Middle Name
GR=	Grade
BD=	Sex
PG=	Birthdate
AD=	Mailing Address
CY=	Parent/guardian
ST=	City
ZC=	State
ZX=	ID
TL=	Zip code
FW=	
FX=	
MVV=	
MX=	
T1=	
T2=	
T3=	

Sort by Field Name

If your external file contained the student's former ID number, you will match it to the **OID (Old ID)** field. Having the OID is useful for matching purposes when importing data into other Aeries tables using the **Import or Add Data to Aeries** form.

There are several fields that you may want to mass populate during the import process. A couple examples of this would be the **STU.TG (Status Tag)** and the **STU.ED (School Enter Date)** fields. Since all of these students are new to this school and will be pre-enrolled, an asterisk '\*' should be populated in the **STU.TG** field and the **STU.ED** field should be populated with the date of the first day of school.

To mass populate a field for all students in the import file, find the field you wish to populate and type the data you would like to display in the field. In the examples below, an asterisk '\*' has been entered for the **STU.TG** field and the date of **08/14/2017** has been entered for the **STU.ED** field.

STU. = Import Fields or Type Text		
T4=		
T5=		
TG=		*
TL=		

STU. = Import Fields or Type Text		
EC6=		
ED=		08/14/2017
EGD=		
EN=		

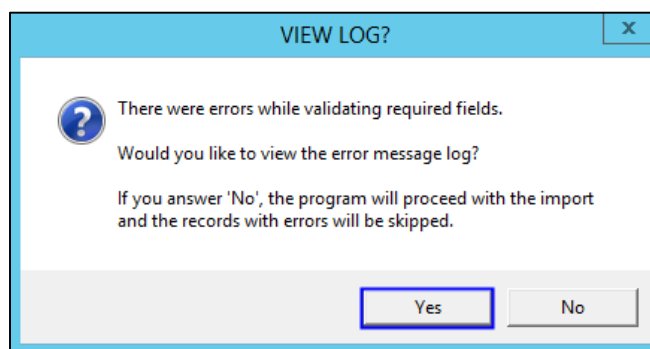
## Data Validation and Correcting Errors

After the import information has been entered in **Step 1** and **Step 2**, the method of assigning ID's has been selected in **Step 3**, and all fields from your temporary table have been matched with the corresponding Aeries fields, the **Import Students** button can be clicked.

The following fields are validated prior to importing into the **STU** table:

- GR must be inside school grade range, except if grade is greater than 13. Another exception is if the LOC rule "N" is set to "1" (Scheduling for next year). The lowest grade allowed will be the lowest grade in the LOC table -1 (minus 1).
- CU and NT must exist in TCH.
- BST and BCU must exist in usysGCOD, unless they are blank.
- LN, and FN need to be populated.
- BD will check that it is a valid date.
- SX will check that it is M, F, B, G or blank.
- OID is needed to import data into other Aeries tables thru "Import or Add Data". This field will be verified and if not selected to import a warning message will display.

If errors are found within the file the following message will display that will display the error log by clicking **Yes**.



A datasheet will display that allows you to print out a listing of errors that should be fixed prior to importing these students into the **STU** table. The record number will display for the record containing the error in the temporary table along with the error.

		qusysMSG : Select Query
	MSG	
▶	Rec# 000003. Invalid Gender code.	

The **View Temporary Table** button will display the temporary table. The record number containing the error can be located. For example, the datasheet above indicates that record 3 has an invalid birthdate. There is an invalid gender code for this student. The data can be corrected on the temporary table.

qTmpTable : Select Query										
	LN	FN	MN	SX	GR	BD	PG	AD	CY	ST
	Elgin	Anna	Ellen	F	8	3/22/2003	MM D Elgin	1238 Edgecliff	Mira Loma	CA
	Gomez	Emelia	Suzanne	F	8	06/10/2003	MM G Gomez	1236 Edgecliff	Mira Loma	CA
	James	Jesse	Herbert	R	8	5/29/2003	M/M J James	1237 Edgecliff	Mira Loma	CA
	Johnson	Sydney	Jean	F	8	2/7/2004	MM P Johnson	1234 Edgecliff C	Mira Loma	CA
	Smith	Brandon	Allen	M	8	7/28/2004	MM G Smith	1235 Edgecliff C	Mira Loma	CA

After the data is corrected the **Import Students** button can be clicked again to continue with the Import Student process.

If there is data that cannot be corrected you can still continue with the Import Student process although the student(s) with invalid data may not be imported. When the following message displays click the **No** button.

VIEW LOG?

There were errors while validating required fields.

Would you like to view the error message log?

If you answer 'No', the program will proceed with the import and the records with errors will be skipped.

Yes

No

The following message will display. Click **Yes** to view the imported students.

VIEW LOG?

5 records were added to the STU table.

SUP and SSD records were also added for these students.

Would you like to see these students?

Yes

No

The list of students will display. The list is temporarily stored in the qusysKID table.

qusysKID : Select Query					
	SN	ID	Students Name	Grade	Birth Date
▶	2902	0099500446	Elgin, Anna Ellen	8	03/22/2003
	2903	0099500447	Gomez, Emelia Suzanne	8	06/10/2003
	2904	0099500448	James, Jesse Herbert	8	05/29/2003
	2905	0099500449	Johnson, Sydney Jean	8	02/07/2004
	2906	0099500450	Smith, Brandon Allen	8	07/28/2004

## Saving File Layouts

Import Student layouts can be created and saved from the **Import Students** form. The **New Layout** button will allow you to start over to create a new layout. The **Save Layout** button will allow you to save the current layout created for future use and the **Delete Layout** button will allow you to delete an old layout.

To save a layout, complete **Step 1** through **Step 4** to set up the layout. After all steps have been completed, click the **Save Layout** button.

STU. = Import Fields or Type Text	
LN	LN
FN	FN
MN	MN
SX	SX
GR	GR
BD	BD
PG	PG
AD	AD
CY	CY
ST	ST
ZC	ZC
ZX	
TL	TL
FW	FW
FX	
MW	MW
MX	
T1	
T2	
T3	

The following entry box will display. Enter an 8-character **Code** and click the **OK** button.

IMPORT ID

Enter an import ID Code - Up to 8 characters

OK Cancel

IMP GR 8

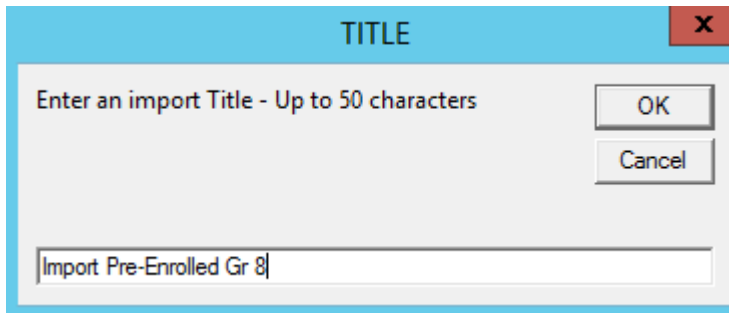
If the Import ID Code already exists, the following message will display. Click **Yes** to overwrite the code or click **No** to cancel and start over.

OVERWRITE?

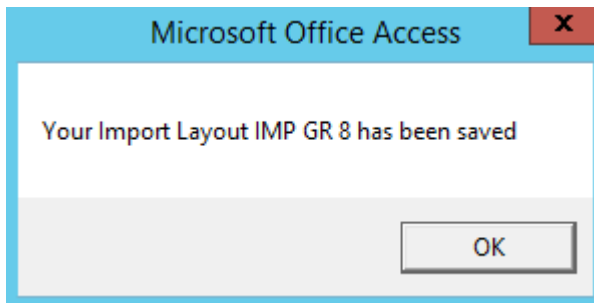
This ID already exists, would you like to overwrite or update it?

Yes No

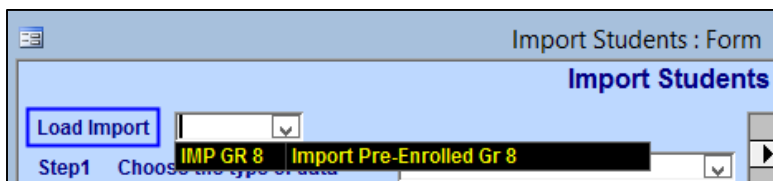
Once the Import ID has been created, the following entry box will display. Enter a descriptive title for the Import and click the **OK** button.



The message below will display indicating the layout has been saved.



After a layout has been saved it can be selected by clicking on the **Load Import** drop down at the top of the **Import Students** form.



A message will display indicating that the Input Fields were loaded. Click **OK**.



The **Import Students** form will display the saved layout. To import the records, click the **Import Students** button.

Import Students : Form

Import Students

Load Import

IMP GR 8

Import Pre-Enrolled Gr 8

Step 1

Choose the type of data

Current database (sch.mde)

Assign name to identify Source File

Step 2

Choose the source of the data

Path & Database:

Table/Query Name: Sheet1

Load Input Fields

Step 3

Choose how to generate the Student ID

☒ Auto-Generate IDs
 ☐ Specify Starting ID Number

New Layout

Save Layout

Delete Layout

☐ Calculate Next Grade as 'Grade + 1'

STU. = Import Fields or Type Text

LN	=	LN
FN	=	FN
MN	=	MN
SX	=	SX
GR	=	GR
BD	=	BD
PG	=	PG
AD	=	AD
CY	=	CY
ST	=	ST
ZC	=	ZC
ZX	=	
TL	=	TL
FW	=	FW
FX	=	
MW	=	MW
MX	=	
T1	=	
T2	=	
T3	=	

Sort by Field Name

Currently you are flagged to Schedule for Next Year. If these students are Pre-Enrolled you must place an asterisk ( \* ) in the TG field

Import Students

Be sure to try loading on test data first! Clear ALL errors before loading into the live copy

Print STU Definition

View Temporary Table

Import or Add Data to Aeries

EXIT