IMPORT / EXPORT

IMPORTS

CLASSES - Grades/Classes/HMRooms

This button will import Grade/Class/Homeroom information from either a CDL (comma delimited file) or an Excel file. Data fields must be in the order listed.

The name of each Grades/Classes/Homeroom must be unique.

Required Information is as follows and also must be in this field order:

- Grade/Class/Homeroom - the name assigned to each grade, class or homeroom
- Teacher First Name
- Teacher Last Name

Students

This button will import student data from either a CDL (comma delimited file) or an Excel file and in the order as listed

No duplicate data will be imported based on the student ID#

Required information is as follows and also must be in this field order:

- Student ID #
- Grade/Class/Homeroom - the name assigned to each grade, class or homeroom
- Student First Name
- Student Last Name
- DOB (Date of Birth) MM/DD/YYYY (OPTIONAL – not required)

Volunteers

This button will import volunteer data from either a CDL (comma delimited file) or an Excel file and in the order as listed

No duplicate data will be imported based on the concatenation (joining) of the Volunteer First Name and Volunteer Last Name (i.e. GeorgeWashington)

Required information is as follows and also must be in this field order:

- Volunteer First Name
- Volunteer Last Name
- Family ID # (OPTIONAL – not required)

Parents/Guardians

See separate Parent/Guardian Instructions and the sample P/G Excel templates.

Faculty & Staff

This button will import Faculty & Staff data from either a CDL (comma delimited file) or an Excel file and in the order as listed.
No duplicate data will be imported based on the employee's social security number.
Required information is as follows and also must be in this field order
♦ First Name
♦ Last Name
♦ Social Security # (must be in the following format 123456789)
♦ Job Classification
*** Note -- You may create up to a maximum of 30 different job classifications

Known Import Issues

The Classes must be created or imported **BEFORE** students are entered or imported, otherwise the relationship between the two tables (Classes and Students) will not be recognized.

The Grade/Class/HMRoom name used in the Classes table and the Grade/Class/HMRoom name used in Students table **MUST BE IDENTICAL**, otherwise the relationship will not be recognized.

Duplicate Grade/Class/HMRoom names in the Classes table are not allowed. The Grade/Class/HMRoom must be unique. For example, to create two or more Grade/Class/HMRooms for the same grade (i.e grade 6); create "Gr6_Wilson; Gr6_Smith, Gr6_Jones, etc……" or something similar.

Grade/Class/HMRoom names -- Recommend that names be something currently in use by the school. For example, "GR_1_Wilson" may make more sense than using a room # or another less clear descriptive name. Even though the teacher's name is also a required "separate" field, adding (joining it) to the Class name will make the drop down pick list more "user friendly" when students check in and out.

Student ID#'s **ARE REQUIRED** and **MUST BE UNIQUE** for each student. Recommend that the same student ID#'s issued by the school district be used in School Check IN. Printing of the student ID# on passes is an option and may be disabled.

Students must be created or imported **BEFORE** parent/guardians are entered or imported, otherwise the relationship between the two tables (Students and Parent/Guardians) will not be recognized.

All punctuation marks, such as periods, dashes, slashes, quotes and spaces, question marks, pound sign, parenthesis, percent signs, etc…. **MUST BE REMOVED** from the source data file (file you are importing data from). Having any of these items in your source file will impair the import. The simplest method to remove these characters is to use the Find & Replace tool found in Excel, or Notepad. In a csv file (comma delimited file, CDL), **commas** are required, but only after the data in each field as a field separator. Commas inside the field data (i.e. Geor,ge, Washington,) will cause the import to fail. The comma should separate the data fields (i.e. George,Washington,).

If data (text) inside a field must be separated for legibility purposes, use an underscore (i.e. Geor_ge,Washington,). An underscore will generally not affect an import.

In most csv (CDL or comma delimited files), the most common field separator is a comma, but often times the tilde symbol (~) is seen. We recommend in these cases that the Find & Replace function be used, replacing the tilde with a comma (i.e. George~Washington~ becomes George,Washington,)

Excel Imports

Excel file formats are slightly different in each release of Excel (95, 97, 2000 & 2003). Generally, School Check IN can import each of these formats. Often times when exporting to Excel, "hidden" data is added. This "hidden" data will impair the import process.

If an Excel import fails, try the following:
1. Place cursor (I-bar) in cell A1.
2. Press & hold the shift key. While keeping the shift key depressed and using the right arrow key ➜, select the remaining data cells moving across the row until all data in row 1 is selected (highlighted).
3. Keep the shift key pressed and using the down arrow key ⬇, select the remaining data cells moving down until all data is selected (highlighted).
4. Once all data is selected (highlighted), release the shift key.
5. Click the copy command
6. Open a new worksheet
7. Place the cursor (I-bar) in cell A 1of the new worksheet and paste the selected data cells into the new worksheet.
8. Save new worksheet
9. Close Excel
10. Try importing the new worksheet.

The attempt here is to copy **ONLY** the data and not the worksheet into a new worksheet. Trying to select the data by clicking outside the row or column will not work. This procedure will select the entire row or column, including any "hidden" data

Saving Excel as a "csv" file. A "csv" is also referred to as a CDL (comma delimited file or a text file). When saving an Excel file as a csv file, Excel appears to save the file as a csv file, but the save process isn't finished until the file is closed. Click the "X" box and Excel will prompt you that the file **"is not an Excel format. Do you wish to save your changes?"**

The syntax in this Excel message is tricky. Clicking **YES** will save the file in the Excel format, **not csv format**. One must click **NO** to complete the save as a csv format.

Tab delimited files -- School Check IN does not import tab delimited files. Opening a tab delimited file in Excel appears similar to a comma delimited file. Often users are confused by the file types (tab and csv) and think a tab will work because they opened it in Excel as a tab delimited file and then save it using Excel as a csv file. This will not work. The source file exported by your school management software application must be exported as either an "Excel file" or a "comma delimited file" and not a tab delimited file.

TIP: Many schools do not have or maintain a parent/guardian file. This file contains the list of individuals who are authorized to pick a student up from school. If your school does not have this information in an active file, then create this file. A simple method is to use Excel. Enter data in each cell **Student ID#**, **Parent/Guard First Name**, **Parent/Guard Last Name**, **Relationship to Student** (this last item is optional).

	A	B	C	D
1	1001	Ramirez	Gloria	Mother
2	1001	Adame	Ramiro	Father
3	1002	Ramirez	Gloria	Mother
4	1002	Adame	Ramiro	Father
5	1003	Adams	Ellen	Mother
6	1003	Adams	Tim	Father
7	1004	Allen	Kelly	Mother

Just keep adding new data or modifying existing data as new information becomes available. Run another import using this Excel file to add new data or update existing data in School Check IN. This Excel file will become your Parent/Guardian source file.

CSV (comma delimited) Files

Examples of csv files: **Note, a "comma" separates the fields and field headers are not used.** CSV files may also be referred to as text files, CDL files and on occasion ASCII files.

Classes
Fourth Grade,Susan,Anthony
Sixth Grade,Rosalyn,Carter
First Grade,Thomas,Jefferson
Fifth Grade,Ronald,Regan

Students
20002,Sixth Grade,Edward,Abbott
13340,Fifth Grade,Larry,Arnett
60009,First Grade,Jack,Bedell
13123,Fifth Grade,Mark,Belfeld

Faculty & Staff (remove dashes from social security number)
Mary,Allen,444444444,Cleriacl
Katherine,Wilson,111111111,Administrator
Christopher,Columbus,222222222,Teacher
Jackie,Kennedy,333333333,Substitute

Guardians
20002,Abbott, Ed,Father
20002,Abbott,Sally,Mother
13340,Arenet,Katherine,Grandmother
60009,Bedell,Anna, Mother

Volunteers
George W,Carver,
Bonnie,Chambers,
Hillary,Clinton,
Henry,Ford,

UPDATES
One question we often receive is "How often should an import be done?" This generally refers to importing students and parent/guardians. The answer depends on how much your student roster changes. Once you learn and understand the import process, importing new students is very easy.

School Check IN imports new students very well. We recommend that the entire student roster be imported again to add the new students. This can be done daily, weekly, monthly or as often as required. This process is very unique to School Check IN, because only the **NEW** students and any **CHANGED** data for existing students will be imported. Don't worry about duplicating students, this will not occur.

Plus, School Check IN does a comparison check between your existing data and the new import. All students that are not in the new import are identified. These are likely students who have left the school and can be immediately removed from your active student list during this new import (update) process.

CLASSES and STUDENTS --- The Relationship

Classes Table

CLASSES

WARNING: If you need to change the name of a teacher assigned to a Grade, Class or Homeroom, part way through the school year, REPLACE (do not delete) the departing teacher's name with the new teacher's name. Click in the teacher's name and use backspace key to erase the old teacher's name and then enter the new teacher's name. Clicking the "DELETE CLASS" button will delete that class and all students in that Grade, Class or Homeroom, as well as, all parent/guardians associated with all the students in that Grade, Class or Homeroom. Once done, it cannot be undone.

Grades / Classes / HMRooms	Last Name	First Name	
Fourth Grade	Anthony	Susan	< Delete Class
Sixth Grade	Carter	Rosalyn	< Delete Class
First Grade	Jefferson	Thomas	< Delete Class
Fifth Grade	Regan	Ronald	< Delete Class
Third Grade	Ross	Betsy	< Delete Class
Second Grade	Washington	George	< Delete Class

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Linked Fields

School Check IN uses two tables **CLASSES** and **STUDENTS**. The link between the fields is the name of the Grade/Class/HMRoom (see yellow area) in each table. The data entered for the name of a Grade/Class/HMRoom in the CLASSES table **MUST BE EXACTLY** the same as the name of the Grade/Class/HMRoom entered into the STUDENTS Table.

CLASSES Table	STUDENTS Table
Grade/Class/HMRoom Name =	Grade/Class/HMRoom

When entering data or importing data, **ALWAYS enter or import the data for the CLASSES Table first** (before entering or importing data for the Students Table). If done in reverse, students before classes, then the link (relationship) will not be established.

Students Table

Students

Last Name	First Name	Grade/Class/HMRoom	Student ID#	D.O.B	Delete Student	Add Guardian
Abel	Daniel	Kg - Runyon	1205		< Delete Student	Add Guardian
Abel	Krista	1st - Chlebowski	1404		< Delete Student	Add Guardian
Adair	Austin	1st - Bryars	2804		< Delete Student	Add Guardian
Adams	Alicia	4th - Rea	1003		< Delete Student	Add Guardian
Agnew	Gage	5th - Lofe/Pfledderer	18902		< Delete Student	Add Guardian
Alexander	Connor	2nd - Smith/Sykes	9203		< Delete Student	Add Guardian
Alford	Kelsey	4th - Swanick	31801		< Delete Student	Add Guardian
Alvarez	Zoe	Kg - Shands	4205		< Delete Student	Add Guardian
Ammon	Katherine	4th - Rea	6304		< Delete Student	Add Guardian
Ammon	Lauren	4th - Peek	6404		< Delete Student	Add Guardian
Anderson	Kursten	4th - Johnson	1203		< Delete Student	Add Guardian
Anderson	Nicole	3rd - Brown	40702		< Delete Student	Add Guardian
Anderton	Emily	3rd - Hope	11803		< Delete Student	Add Guardian
Anderton	Kevin	5th - Coleman	11903		< Delete Student	Add Guardian
Andrews	Hannah	4th - Swanick	41901		< Delete Student	Add Guardian
Andrews	Michael	5th - Christian	42000		< Delete Student	Add Guardian
Anthony	Louis	3rd - Brown	43802		< Delete Student	Add Guardian
Anthony	Nathan	Kg - Colquitt	5105		< Delete Student	Add Guardian
Apticar	Joshua	Kg - Shands	7605		< Delete Student	Add Guardian
Ash	Jesse	3rd - Miller	53902		< Delete Student	Add Guardian
Auclair	Connor	Kg - Zaal	16705		< Delete Student	Add Guardian
Austin	Mackenzie	4th - Elton	60701		< Delete Student	Add Guardian

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STUDENTS and Parent/Guardians --- The Relationship

Students Table

Last Name	First Name	Grade/Class/HMRoom	Student ID#	D.O.B	Delete Student	Add Guardian
Abel	Daniel	Kg - Runyon	1205		< Delete Student	Add Guardian
Abel	Krista	1st - Chlebowski	1404		< Delete Student	Add Guardian
Adair	Austin	1st - Bryars	2804		< Delete Student	Add Guardian
Adams	Alicia	4th - Rea	1003		< Delete Student	Add Guardian
Agnew	Gage	5th - Lofe/Pfledderer	18902		< Delete Student	Add Guardian
Alexander	Connor	2nd - Smith/Sykes	9203		< Delete Student	Add Guardian
Alford	Kelsey	4th - Swanick	31801		< Delete Student	Add Guardian
Alvarez	Zoe	Kg - Shands	4205		< Delete Student	Add Guardian
Ammon	Katherine	4th - Rea	6304		< Delete Student	Add Guardian
Ammon	Lauren	4th - Peek	6404		< Delete Student	Add Guardian
Anderson	Kursten	4th - Johnson	1203		< Delete Student	Add Guardian
Anderson	Nicole	3rd - Brown	40702		< Delete Student	Add Guardian
Anderton	Emily	3rd - Hope	11803		< Delete Student	Add Guardian
Anderton	Kevin	5th - Coleman	11903		< Delete Student	Add Guardian
Andrews	Hannah	4th - Swanick	41901		< Delete Student	Add Guardian
Andrews	Michael	5th - Christian	42000		< Delete Student	Add Guardian
Anthony	Louis	3rd - Brown	43802		< Delete Student	Add Guardian
Anthony	Nathan	Kg - Colquitt	5105		< Delete Student	Add Guardian
Apticar	Joshua	Kg - Shands	7605		< Delete Student	Add Guardian
Ash	Jesse	3rd - Miller	53902		< Delete Student	Add Guardian
Auclair	Connor	Kg - Zaal	16705		< Delete Student	Add Guardian
Austin	Mackenzie	4th - Elton	68791		< Delete Student	Add Guardian

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Linked Fields

School Check IN uses two tables **STUDENTS** and **Parent/Guardian**. The link between the fields is the **Student ID#** in each table. The Student ID# entered for each student in the CLASSES table **MUST BE EXACTLY** the same as the Student ID# entered into the Parents/Guardian Table.

STUDENT Table		Parent/Guardian Table
Student ID#	**=**	Student ID#

When entering data or importing data, **ALWAYS enter or import the data for the Students Table first** (before entering or importing data for the Parent/Guardian Table). If done in reverse, Parents/Guardians before Students, then the link (relationship) will not be established.

Parent/Guardian Table

Student Parents & Guardians

Last Name	First Name	Grade/Class/HMRoom	Student ID	
Abbott	Edward	Sixth Grade	20002	Add Guardian
Abbott, sally		Mother	< Delete Guardian	
Abbott, Ed		Father	< Delete Guardian	
Arnett	Larry	Fifth Grade	13340	Add Guardian
Arnett, Katherine		Grandmother	< Delete Guardian	