

# New Page

PickATime

Help & Documentation

Getting Started

[Overview](#) [The 6 Data Files](#)

File Reference

[Student file](#) [Teacher file](#) [Class file](#) [Enrollment file](#) [Parent files \(optional\)](#)

Teams

[Creating teams](#)

Importing

[Import process](#) [Error messages](#) [Fixing bad data](#) [Removing data](#)

Reference

[FAQ](#) [Common mistakes](#)

[Help](#) > [Parent Teacher Scheduler](#) > Importing Data Files

## Importing Data Files

Learn how to prepare and import your school data files into PickATime to set up your parent-teacher conference scheduler.

Step 2 of the PTA setup process

### **i**

**Import order matters** Always import files in this order. Each file depends on the one before it.

1. Students

→

2. Teachers

→

3. Classes

→

4. Enrollment

# The 6 Data Files

The PTA scheduler requires 4 files and supports 2 optional files. All files must be **tab-delimited text files** (`.txt` or `.tsv`).

## Required Student file

Lists every student. Parents use this to find and attach their child.

## Required Teacher file

Lists every teacher participating in conferences, their email, and room.

## Required Class file

Defines each class and links it to a teacher.

## Required Enrollment file

Specifies which students are in which classes.

## Optional Parent file

Pre-loads parent accounts. Typically only needed for Single Sign-On setups.

## Optional Parent-Student relationship file

Links parents to specific students. Required for Single Sign-On.



**How to export from your SIS** Export each file as a tab-delimited text file. In **Excel**: File → Save As → Text (Tab delimited) (.txt). In **Google Sheets**: File → Download → Tab Separated Values (.tsv).

# Student File

This file lists all students. Parents use the `SecurityValue` field to verify they've selected the right child when they first register.

## Required columns

Column	Description	
<code>StudentID</code>	Unique identifier for each student	Key
<code>First</code>	Student's first name	
<code>Last</code>	Student's last name	
<code>SecurityValue</code>	What a parent enters to verify their child (e.g. date of birth in <code>dd/mm/yyyy</code> format). Prevents parents from accidentally selecting the wrong student.	

## Example

StudentID	SecurityValue	First	Last
4321	04/12/2012	Amanda	Jones
4322	08/04/2012	Timothy	Smith

## Optional column

Column	Description	
Action	Set to <code>delete</code> to remove a previously imported student. Defaults to <code>update</code> if omitted.	Optional



**Don't recycle Student IDs** If a StudentID that was used last year is reassigned to a different student this year, the parent of the original student will see the new student listed as their child. If you need to reuse IDs, remove all stored contacts first — go to *Global Setup* → *Contacts* → *Remove all contacts*.

# Teacher File

This file lists all teachers who will be available for conferences. Import this file before importing your class file.

## Required columns

Column	Description	
TeacherID	Unique identifier for each teacher	Key
First	Teacher's first name	
Last	Teacher's last name	
Email	Teacher's login email address (must also be unique)	Unique
Room	Where the teacher will hold conferences. Can be used for room-based reporting.	

## Example

TeacherID	First	Last	Email	Room
234	Angela	Frank	a@school.com	106

TeacherID	First	Last	Email	Room
225	Bobby	Smith	b@school.com	Library

## Optional columns

Column	Description	
Password	Sets an initial password (min. 6 characters). If not set, teachers create their own password on first login. Once a teacher sets their own password, a re-import won't change it — use the admin reset button in <i>Global Setup</i> → <i>Contacts</i> instead.	Optional
VirtualRoom	Import a pre-existing online meeting link. Not needed if you're using PickATime's built-in Zoom/Google Meet integration — those links are generated automatically.	Optional
AccessLevel	Set to 3 to give a teacher Resource Administrator access (they can block their own schedule). Default is Appointment Viewer.	Optional
GroupName	Categorize teachers (e.g. <i>Middle School, Science Dept</i> ). Useful for creating different slot durations per group, and for displaying teachers under group headings on the scheduling page.	Optional
Action	Set to delete to remove a teacher. Defaults to update if omitted.	Optional



**Setting up team conferences?** See the [Creating Teams](#) section below for how to configure teachers who conference together.

## Class File

This file defines the classes and connects each class to a teacher.

### Required columns

Column	Description	
--------	-------------	--

<code>ClassID</code>	Unique identifier for each class. Must be unique per teacher — see note below.	Key
<code>TeacherID</code>	Must match a <code>TeacherID</code> from your teacher file	
<code>ClassName</code>	Display name shown in the scheduling legend (e.g. <i>Math</i> ). Useful when multiple sections share the same subject.	Optional
<code>GroupName</code>	Categorize teachers for slot scheduling (e.g. <i>Upper School, Lower School</i> )	Optional

## Example

<code>ClassID</code>	<code>TeacherID</code>	<code>ClassName</code>
Math-Sec200	234	Math
Math-Sec201	235	Math



**ClassID must be unique per teacher** If two teachers both teach "English 9," you can't use `English9` for both. Append the `TeacherID` to make each unique — e.g. `Eng9-869` and `Eng9-412`. Make sure your enrollment file uses these same IDs.

## Optional columns

Column	Description	
<code>PTAN</code>	Number of appointments a parent can book for this class. Default is <code>1</code> . Set to <code>2</code> for homeroom teachers or advisors if needed.	Optional
<code>Max</code>	Maximum students that can enroll in the class. Must be larger than actual enrollment. Defaults to unlimited.	Optional
<code>Action</code>	Set to <code>delete</code> to remove a class. Defaults to <code>update</code> .	Optional

# Enrollment File

This file connects students to their classes. It must be imported after the student, teacher, and class files.

## Required columns

Column	Description	
StudentID	Must match a StudentID from your student file	Key
ClassID	Must match a ClassID from your class file	

You can format this file in one of two ways:

### Option 1 — One class per row (multiple rows per student)

StudentID	ClassID
123	English-SecB
123	Science

### Option 2 — Multiple classes per row (one row per student)

StudentID	ClassID	ClassID
123	English-SecB	Science
456	Math	Gym

## Optional column

Column	Description	
Action	Set to delete to remove specific enrollment records. Defaults to update.	Optional

## Parent Files (Optional)

These two files are only required if you're setting up **Single Sign-On (SSO)**. For most schools, parents create their own accounts at first login.

## Parent file

Column	Description	
ParentID	Unique identifier for each parent	Key

Column	Description	
First	Parent's first name	
Last	Parent's last name	
Email	Parent's login email (must be unique)	Unique

## Parent-Student relationship file

Column	Description
ParentID	Must match a ParentID from your parent file
StudentID	Must match a StudentID from your student file



To prevent parents from adding or removing students from their own account, go to *Global Setup* → *Business Setup* → *Miscellaneous* and uncheck "**Allow parents to attach and detach students.**"

## Creating Teams

Teams let two or more teachers share a single conference slot — useful for co-teachers, special education staff, or advisor pairings. There are three approaches depending on your setup.

**Best when:** teams won't also conference individually.

Create a new "teacher" entry with a team name like `Team Smith-Jones` and a made-up TeacherID. Assign all shared students to this team teacher's class. You can use one teacher's email or leave it blank — just make sure the email and TeacherID don't duplicate an existing teacher.

Once imported, grant individual teachers access to the team's schedule via *Contacts* → *Resource Access* for each teacher.



Make sure the individual teachers (Smith and Jones) are not also available at the same time as the team, or parents could book them independently during the same slots.

**Best when:** teachers also have individual conferences alongside team conferences.

In the class file, concatenate the two TeacherIDs with a semicolon in the `TeacherID` column:

TeacherID	ClassID
T123;T124	Math101
T123	Biology
T124	English

When a parent books the team, both teachers' corresponding slots are blocked. When a parent books with either teacher individually, the team slot is also blocked.

**Best when:** you've already imported all four files and want to combine teachers into a team after the fact.

1

Go to **Class Editor** and click **Add Teacher/Team**.

2

In the Select Person dialog, search for the first teacher and click **Add to Team**.

3

Search for the second teacher and click **Add to Team**. Repeat for any additional members.

4

All team members appear in the top-left. Click **OK** to create the team.

5

Create or move classes to the team. To add a room number, go to the Appointments page and enter it to the right of the team name.

# Import Process

Once all four required files are ready, follow these steps to import them into your PickATime account.

1

## Open the Importer

From the main navigation, click **Importer**.

2

## Set Data Type to "School"

This must be selected for all four files.

3

## Select your event

Choose the correct event from the Event dropdown.

4

## Import the student file first

Set File Type to *Students*, click Browse to locate your file, then click **Import**.

5

## Repeat for each remaining file

Once the student file imports without errors, repeat steps 3-4 for Teachers, Classes, and

Enrollment — in that order. Fix any errors in a file before moving to the next.



**Safe to re-import** Each row has a unique key. Re-importing the same data won't create duplicates — the system updates existing records or adds new ones. If you're missing data, simply import a file containing just the missing rows.



After importing, confirm the number of rows imported matches the number of rows in your file. If there's a mismatch, check for errors.

## Error Messages

Click an error to see what it means and how to fix it.

### General

#### Any file Incorrect file type was supplied

Your file must be a tab-delimited text file (`.txt` or `.tsv`). Make sure you exported using the correct format — not `.xlsx`, `.csv`, or `.xls`.

### Student file errors

#### Students The file does not have a column labeled "First" or "StudentID"

Column names must match exactly. The student ID column must be labeled `StudentID` — not `Student_ID`, `Student Lunch Number`, or anything else. Check every column header against the required names.

#### Students The ID field is empty for XX

Check your file — the row for student XX is missing data in a required column (first name, last name, StudentID, or date of birth).

### Teacher file errors

### Teachers Found contact with teacherID of ABC and a different contact with the email of betsy@noemail.com

This means your import file has TeacherID `ABC` paired with email `betsy@noemail.com`, but in the system there are already two separate contacts — one with TeacherID `ABC` (different email) and one with email `betsy@noemail.com` (different TeacherID). The system can't determine which one to update.

**To fix:** In the Admin UI, search for the contact with the flagged email address. If it has a different TeacherID and belongs to an old contact, delete it, then re-import your teacher file.

### Teachers The password field should be 6 characters or more for XX

Check the Password column for teacher XX — the value is fewer than 6 characters. Update to a valid password and re-import.

## Class file errors

### Classes Could not find teacher with teacherID XX

Your class file references a TeacherID that doesn't exist in your teacher file. Check your teacher file and make sure TeacherID `XX` is present and correctly spelled.

### Classes Class 'Math' already exists with a different teacher than '123'

Your class file has the same ClassID assigned to two different teachers. ClassIDs must be unique per teacher.

**To fix:** Rename the duplicate ClassID (e.g. append a section number or teacher ID). Update your enrollment file to match. Then go to *Class Editor* and remove the incorrectly imported class before re-importing.

## Enrollment file errors

### Enrollment Student ID not found

The enrollment file contains a StudentID that doesn't exist in the student file. Make sure the student file was imported first, and that the ID in question (e.g. `12345`) is present in it.

### **Enrollment Class XX not found**

Your enrollment file references a ClassID that wasn't imported in the class file. Check your class file for the missing ClassID. Note: if the class is something like a Study Hall where no conferencing takes place, you can safely ignore this error.

### **Enrollment No class ID found for student XX**

A row in the enrollment file has a StudentID but no ClassID. Check for accidental blank columns in that row.

### **Enrollment Class XX has reached maximum enrollment. Student XX has been skipped.**

You've set a maximum enrollment cap for this class and are importing more students than it allows. Go to *Class Editor*, click the teacher, then the class, and check the **Maximum** column value.

## Parent file errors

### **Parents The file does not have a column labeled "First" or "First Name"**

Column headers must match exactly. Check that your parent file uses `First` (not `FirstName` or `first_name`).

### **Parents Could not find Parent with ID 'XX' or Student with ID 'YY'**

The parent-student relationship file references a ParentID or StudentID that wasn't imported. Make sure both the parent file and student file were successfully imported before importing the relationship file.

# Fixing Bad Data

## Student file fixes

### Student names were reversed

Correct the file and re-import. The system will update the existing records.

### Student IDs were incorrect

Add an `Action` column to your incorrect file, fill it with `delete`, and re-import. Then re-import the corrected file.

### SecurityValue field was missing

Add the `SecurityValue` column to your file and re-import.

### Some students were missing

Import your student file again with the newly added students, then import your enrollment file to add their class data.

## Teacher file fixes

### i

How you fix teacher data depends on whether you've already imported your class file. Once the class file is imported, teachers are placed on the Appointments page and can't be updated by re-importing the teacher file alone.

## Before importing your class file

### Teacher names or IDs are incorrect

Add an **Action** column filled with **delete** to your incorrect teacher file and re-import. Then re-import the corrected file.

## After importing your class file

### Some teachers shouldn't be in the event

Go to *Class Editor* and remove teachers who aren't participating in conferences.

### Teachers are assigned to the wrong classes

Go to *Class Editor*, remove all classes, then re-import your class file.

## Class file fixes

### Wrong classes were imported, or too many classes

Go to *Class Editor* and delete the incorrect classes individually (click the red × next to the class name), or use *Imports* → *Class file* → *Remove existing Classes* to clear all classes at once.

### One class is assigned to the wrong teacher

The simplest fix is to move the class in *Class Editor*. If you just re-import a corrected class file, the correct assignment will be added — but the incorrect one won't be removed automatically.

## Enrollment file fixes

### Wrong or outdated enrollment was imported

Delete all classes via *Class Editor*, then re-import your class file and a corrected enrollment file.

### Some enrollment data was missing

Simply re-import your enrollment file with the missing rows included. Existing enrollment and parent appointments won't be affected.

# Removing Data

## Remove everything and start over

1

On the Events List page, create a new event using your existing event as a template (this copies your settings). Then delete the old event — this removes all class and enrollment data.

2

Remove all contacts: *Global Setup* → *Contacts* → *Show advanced options* → *Remove all customers* → *Select "Event Administrator"*. This removes all parents and teachers.

3

Remove students: click **Remove students not enrolled in a class**. This may take a few minutes. You'll have a clean event ready to start over.

## Remove only class and enrollment data (keep slots and teachers)

Go to *Class Editor* and delete all classes. Your teacher roster and time slots on the Appointments page will be preserved. Then re-import your class and enrollment files.

## Remove student, teacher, class, and enrollment data (keep parents)

1

Create a new event using your last event as a template, then delete the old event.

2

Add an **Action** column with **DELETE** to your student and teacher files and re-import both. Parent accounts will remain untouched.

# Frequently Asked Questions

### We accidentally imported last semester's data but already have parent appointments. Can we import new files without losing those appointments?

Yes — you can import new files and they'll add to the existing data rather than replace it. New classes will be added, but previously imported classes won't be deleted automatically. To remove old classes, use the `Action` column set to `delete` or remove them in Class Editor.

Importing new data will never remove existing parent appointments.

### We re-imported our class and enrollment files but don't see the changes in Class Editor.

A new import adds or updates data — it doesn't delete. To remove classes, you need to either delete them from Class Editor or include them in an import with the `Action` column set to `delete`.

### We were missing some class and enrollment data. Can we import a new file without disrupting existing bookings?

Yes. Re-importing will only add the new data. Existing parent appointments won't be touched.

### How do I verify my data was imported correctly?

Go to *Class Editor*. Select a teacher on the left to see their classes, then click a class to see enrolled students. To view all classes together, check **Show only Classes** on the right side.

## Common Mistakes to Avoid

- **Don't export a full year when you only need a semester.** Import only the data relevant to this conference event.
- **Leading zeros on numeric IDs get stripped by Excel.** If your IDs have leading zeros (e.g. `00123`), format the column as Text before saving — otherwise Excel will silently remove the zeros.
- **Column names must match exactly.** `Email` works. `Email_Address`, `Teachers_Email`, and `email` don't. No spaces, no underscores, exact case.
- **Student IDs changed from last year?** You'll need to remove last year's student data first. See [Removing Data](#).

- **Using first + last name as StudentID?** Check the box "*Use First + Last Name as StudentID*" in *Global Setup* → *Business Setup* → *Parent Login*. You don't need to create a concatenated field — PickATime handles this automatically. Update your CUI Messages prompt so parents know to enter their child's full name.
- 

Revision #1

Created 2026-06-10 14:52:24 UTC by Anne Taves

Updated 2026-06-10 14:54:03 UTC by Anne Taves