Importing Data Files in pickAtime

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Import Files

Student File

The Student File is used to add students to your school account. For multiple PTA events, you only need to import the Student File once. Use the Enrollment File to assign students to specific events.

Required Columns

1. StudentID – A unique identifier for each student.
2. First – The student's first name.
3. Last – The student's last name.
4. SecurityValue
   - A value parents use to identify their child when signing up.
   - Example: The student's birth date (e.g., mm/dd/yyyy).

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers labeled exactly as specified above.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

TEMPLATE

StudentID	First	Last	SecurityValue
101	Betsy	Smith	01/15/2010
102	William	Johnson	06/20/2012

Key Points

1. StudentID:
   - Must be unique for each student.
2. Recycling StudentIDs:
   - Do not reuse StudentIDs without first removing the old student data.
   - Example:If StudentID 101 was assigned to Betsy Smith last year and is now assigned to William Johnson, Betsy's parent will log in and mistakenly see William listed as her child.

- Solution: Remove all contacts before reusing StudentIDs. This can be done via the Global Setup/Contacts Setup page using the Remove All Contacts option.

3. SecurityValue Type:
   - After importing the file, go to Global Setup/Contacts.
   - Set the Type column for the SecurityValue field to Date.
   - This allows parents to enter a birth date in the format mm/dd/yyyy.

By following these guidelines, you can efficiently import and manage student data in the system.

The Student File adds students to the account. If multiple PTA events are being held, the Student File only needs to be imported once. The Enrollment File will then be used to associate students with each event.

Where to Check Imported Student Data in the Admin UI

- After importing, go to the Contacts page in the Admin UI.
- Locate students by searching for their StudentID or name.
- Ensure that all expected students appear in the list.

Teacher File

The **Teacher File** is used to add teachers to your account. For multiple PTA events, you only need to import the **Teacher File** once. Use the **Class File** to link teachers to individual events.

Required Columns

1. **TeacherID** - A unique identifier for each teacher.
2. **First** - The teacher's first name.
3. **Last** - The teacher's last name.
4. **Email** - The teacher's email address. Each email must be unique.

Optional Columns

1. Password
   - Specifies an initial password for the teacher.
   - If not provided, teachers will be prompted to create their own password when logging in.
2. Room
   - Specifies the physical room where the teacher will be during the event.
   - Useful for generating reports by room number.
3. VirtualRoom
   - A virtual meeting link (e.g., Zoom, Google Meet, Microsoft Teams).
4. AccessLevel
   - Sets the teacher's access level for the system.
     1. Appointment Viewer (default).
     2. Appointment Maker (can book appointments for parents).
     3. Resource Administrator (can block their own schedule).

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers labeled exactly as specified.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

Template:

TeacherID	First	Last	Email	Room
T001	John	Doe	john.doe@school.edu	123

T002	Jane	Smith	jane.smith@school.edu	321

Additional Notes

1. Unique Rows:
   - Ensure the number of unique rows in your file matches the number of imported rows.
   - Mismatches may indicate duplicates or previously imported data.
2. Password Reset:
   - Once a teacher creates their own password, re-importing the file will not change it.
   - To reset all teacher passwords, use the Reset Administrative Password button on the Global Setup / Contacts Setup page.
3. Re-imports:
   - If re-importing the file with old and new teachers, the system will display the total number of rows and newly added rows.

By following these guidelines, you can efficiently import and manage teacher data.

> The Teacher File adds teachers to the account. If multiple PTA events are being held, the Teacher File only needs to be imported once. The Class File will then be used to assign teachers to specific events.

Where to Check Imported Teacher Data in the Admin UI

- After importing, go to the Contacts page in the Admin UI.
- Locate teachers by searching for their TeacherID or name.
- Ensure that all expected teachers appear in the list.

Class File

The **Class file** is essential for creating and associating classes with teachers in the pickAtime event. Below are the detailed instructions for creating a valid **Class File**.

Required Columns

1. ClassID
   - A unique identifier for the class.
   - Must be unique per teacher. For example, if one class has multiple sessions taught by different teachers, you'll need distinct ClassIDs (e.g., "Eng9-869").
   - Ensure the same ClassID is used in the Enrollment File.
2. TeacherID
   - Links the class to the teacher.
   - Must match the TeacherID listed in the Teacher File.
3. ClassName (Optional)
   - Provides a descriptive name for the class (e.g., "Math").
   - Useful for display purposes on the CUI legend.
4. GroupName (Optional)
   - Categorizes teachers into groups (e.g., "Upper School" or "Lower School").
   - Helpful for managing time slots for different teacher groups.
5. PTAN (Optional)
   - Specifies the number of allowed parent appointments per class. Default is 1 if absent.

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers labeled exactly as specified.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

TEMPLATE of a Simple Class File:

ClassID	TeacherID	ClassName
Math-101	T001	Math
Science-102	T002	Science

TEMPLATE with Additional Columns:

ClassID	TeacherID	ClassName	GroupName	PTAN
Math-101	T001	Math	Upper School	2
Science-102	T002	Science	Lower School	1

PTAN (parent teacher appointment number) is the number of allowed appointments for each student's parent for that class. For example, some schools allow the parent 2 appointments with a home room teacher or an advisor. If the column is not present, 1 is assumed.

> The Class File assigns teachers to specific events and their associated classes. Each class must have a unique ClassID, and a TeacherID must match an imported teacher.

Where to Check Imported Class Data in the Admin UI

- Open the event in the Admin UI.
- Go to the Class Editor tab.
- The list of teachers and their imported classes will be displayed.
- Verify that all expected classes are associated with the correct teachers.

> If you have older classes and enrollments, you can now delete the event’s existing classes and enrollments directly from the Import page before uploading new data. This option will also delete the classes’ associated teacher resources, making it easier to remove bad data without leaving the Importer page. To locate this feature on the Imports page, click the Class file option within the File Type drop-down menu.

Enrollment File

The **enrollment file** is used to assign students to their respective classes. Below are the requirements and formatting details for creating a valid enrollment file.

Required Columns

- **StudentID** - Identifies the student; must match the StudentID in the student file.
- **ClassID** - Identifies the class; must match the ClassID in the class file.

> Important: Ensure the column titles exactly match those listed above.

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

Import Options

Option 1: Multiple Rows per Student

Each row lists a single StudentID and one ClassID. If a student is enrolled in multiple classes, they will have multiple rows.

TEMPLATE:

StudentID	ClassID
123	Math
123	English
124	Science

Option 2: One Row per Student

Each student has one row, and their classes are listed in separate columns (ClassID1, ClassID2, etc.).

TEMPLATE:

StudentID	ClassID	ClassID	ClassID
123	Math	English	History
124	Science	Math	

> The **Enrollment File** assigns students to classes within a specific event. The students and classes referenced must already exist in the system from the Student and Class files.

Where to Check Imported Enrollment Data in the Admin UI

- Open the event in the Admin UI.
- Go to the Class Editor tab.
- Select a class to view the enrolled students.
- Ensure that all expected students are assigned to their correct classes.

Parent File

The **Parent File** adds parents to the system. This file is required only if you are using Single Sign-On (SSO) authentication.

The Parent File Columns

This file lists all the parents and must contain the following fields:

- **ParentID** - Identifies the parent. This must be unique.
- **First** - Contains the first name of the parent.
- **Last** - Contains the last name of the parent.
- **Email** - Contains the parent's email address. Only one email address should be entered here.

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

TEMPLATE

ParentID	First	Last	Email
37890	Sarah	Jones	sjones@aparent.com
38750	Bob	Williams	bwilliams@aparent.com

Important Notes

- ParentID and Email must be unique. If multiple rows contain the same ParentID, only one contact will be created, with each row updating the previously imported record
- If multiple rows contain the same Email, only one contact will be created, with each row updating the previously imported record.
- If you do not want parents to attach students to their accounts, disable this option in Global Setup / Business Setup under Miscellaneous by unchecking "Allow parents to attach and detach students."

Where to Check Imported Data?

- The Parent File imports contact records only.
- Admins can check the Contacts page in the Admin UI to verify the imported parents.

Parent Student Relationship File

The **Parent-Student Relationship** File connects parents to their respective students. It is only required if your organization uses Single Sign-On (SSO).

Required Fields

The file must contain the following fields:

- **ParentID** - Identifies the parent (must match the ParentID in the Parent File).
- **StudentID** - Identifies the student (must match the StudentID in the Student File).

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

TEMPLATE

ParentID	StudentID
37890	12345
38750	67890

How to Verify Imported Data

Once imported, the parent-student relationships can be verified in the Contacts page of the Admin UI:

- Search for the parent contact using ParentID, Email, or Last Name.
- Select the parent’s contact record in the search result, then select the Parent-Student Relationship tab on the right.

People File

The **People File** is used to import contact records for use in an event. This file can include different types of participants, such as teachers, students, parents, or staff — each row represents a person.

Required Columns

- **ID** - A unique identifier for each contact. Each ID must be unique across all imported contacts (Students, Teachers, Parents, People).
- **First** - The first name of the person.
- **Last** - The last name of the person.
- **Email** - A valid email address for the contact. Only one email address per row is allowed.

Format Requirements

- The file must be a tab-delimited text file (*.txt or *.tsv).
- Each row must represent one person.
- Field names (column headers) must exactly match the required field names (case-sensitive).
- Avoid using formulas, merged cells, or formatting.

Sample Table

ID	First	Last	Email
00123	Alice	Martin	amartin@example.com
00456	John	Stevens	jstevens@example.org
00789	Rosa	Delgado	rdegado@example.net

Where to Check Imported Data

- Go to the Contacts page in the Admin UI to verify that the people have been successfully added.
- You can search by name, ID, or email to confirm individual records.

Appointments File

Importing Appointments

To add Appointments, you first need to import a People file (see "Importing People"). The People file must have a unique identifier for each person. After importing your People file, you can import an Appointment file. The Appointment file must reference the person identifier you previously imported in the People file import.

> **IMPORTANT NOTE**: Appointments can only be imported for Normal event types, not PTA or Simple PTA event types.

1 - Create Your Appointments File

This file lists the appointments to be imported.

Required fields:

- **ID**: Identifies the person; must match an existing contact person ID
- **EventID**: Event ID # for the event (found under Reports > Settings)
- **Resource**: Name of the resource (e.g., Nurse, Health Screenings)
- **Date**: Date and time of the appointment (e.g., 3/4/09 10:00 AM)

> Optionally include additional appointment fields by adding columns. Column headers must match the appointment field titles in the event's Appointment Fields tab.

TEMPLATE:

ID	EventID	Resource	Date
12345	6789	Nurse	3/4/09 10:00 AM
67890	6789	Health Screening	3/5/09 1:30 PM

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at pickatime.com
2. Select Importer
3. Select Data Type: Appointments
4. Select ID for the Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

3 - Confirm the Appointments in the Admin UI

1. Open the Admin UI
2. You will see a red Appointments List for the imported appointments
3. Click an appointment, then click Confirm Appointment
4. This will remove the red color and finalize the slot booking

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Importing Appointments with SMS Reminder

Before beginning, make sure your account is activated for SMS reminders (contact support for activation; additional charges apply).

This process lets you import appointments and send SMS reminders.

1 - Create Your Appointments File

Required fields:

- **ID**: Must match existing person ID
- **EventID**: Event ID # (found in Reports)
- **Resource**: Resource name (e.g., Nurse)
- **Date**: Appointment date and time (e.g., 3/4/09 10:00 AM)
- **Phone**: Phone number to receive SMS reminder
- **TimeToRemind** (optional): Minutes before appointment to send reminder (e.g., 720 for 12 hours; defaults to 1440 = 24 hrs if blank)

TEMPLATE:

ID	EventID	Resource	Date	Phone	TimeToRemind
12345	6789	Nurse	3/4/09 10:00 AM	1234445577	60
67890	6789	Health Screening	3/5/09 1:30 PM	(123)4445577	120

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at pickatime.com
2. Select Importer
3. Select Data Type: Appointments
4. Select ID for the Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

3 - Confirm the Appointments in the Admin UI

1. Open the Admin UI
2. You will see a red Appointments List for the imported appointments
3. Click an appointment, then click Confirm Appointment
4. This will remove the red color and finalize the slot booking

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Importing Appointments with Price

Before starting:

- Ensure the event has "Allow to pay later" enabled
- This allows imported appointments to be unpaid, and participants can pay through the online scheduler in Your Schedule

1 - Create Your Appointments File

Required fields:

- **ID**: Person ID (must match imported People ID)
- **EventID**: Event ID # (found in Reports)
- **Resource**: Resource name (e.g., Nurse)
- **Date**: Appointment date and time (e.g., 3/4/09 10:00 AM)
- **Price**: Fee to be paid (e.g., 1, 1.5, 20, 2.8 in USD)

TEMPLATE:

ID	EventID	Resource	Date	Price

12345	6789	Nurse	3/4/09 10:00 AM	20
67890	6789	Health Screening	3/5/09 1:30 PM	15.5

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

2 - Import Your File

1. Log in at www.pickatime.com
2. Select Importer from the navigation bar
3. Select Data Type: Appointments
4. Select ID for Field ID
5. Check Send Confirm Email if desired
6. Locate and import your file

> Tip: To encourage participants to log in and pay, mention payment instructions in the confirmation/reminder emails. This can be enabled during the import process by checking Send Confirm Email.

Slots File

The **Slot File** is used to define appointment availability (slots) for an event. Each row represents a time block for a resource (e.g., Nurse, Health Screening). Slots are assigned to a specific event and resource.

If your event does not use time-based appointments (such as a Roster event), this file should not be used.

1 - Create Your Slots File

Required Columns:

- **EventID**: The ID number for the event. This can be found under Reports / Account Reports /Settings or in the event link under Event Management / Settings / Online Scheduler Settings / Scheduling Link.
- **Resource**: Name of the resource (e.g., Nurse, Health Screenings). Must match an existing resource in the event.
- **Date**: Date for the appointment slots (e.g., 03/04/2025). Format: MM/DD/YYYY.
- **StartTime**: Start time for the first slot (e.g., 10:00 AM). Format: HH:MM AM/PM.
- **EndTime**: End time for the last slot (e.g., 11:30 AM). Format: HH:MM AM/PM.
- **Duration**: Length of each slot in minutes (e.g., 10, 15, 20).
- **Max**: Maximum number of appointments allowed per slot.

TEMPLATE

EventID	Resource	Date	StartTime	EndTime	Duration	Max
373933	Health Screenings	03/18/2025	09:00 AM	12:00 PM	15	1
373937	Nurse	03/18/2025	01:00 PM	03:00 PM	20	2

Key Points

EventID:

- Must match an existing event on your account.
- You can find the EventID in the event's Scheduling Link or under Reports.

Resource:

- Must match the resource name as defined in your event.
- If the resource name does not exist or is misspelled, the import will fail.

Time Format:

- Use 12-hour format with AM/PM for StartTime and EndTime.
- Make sure the duration fits evenly into the total time range.

Max:

- Defines how many appointments can be booked in the same time slot.
- Example: A Max of 2 allows two people to book the same time.

Unsupported Fields:

- Slot Type and Slot Appointment Type are not supported in imports.
- All imported slots will default to:
  - Slot Type: Visible to Customers
  - Appointment Type: In-Person

Additional Optional columns:

- **SlotTypeID:** Controls the visibility of the slot to customers. Accepted values:
  - **1** — Visible to Customer (default)
  - **2** — Hidden from Customer
  - **3** — Shown with Call Status
  - **4** — Make Unavailable
- **SlotApptTypeID:** Specifies the appointment format for the slot. Accepted values:
  - **1** — In-Person (default)
  - **2** — Virtual
  - **3** — In-Person or Virtual

TEMPLATE

EventID	Resource	Date	StartTime	EndTime	Duration	Max	SlotTypeID	SlotApptTypeID
373933	Health Screenings	03/18/2025	09:00 AM	12:00 PM	15	1	1	1
373937	Nurse	03/18/2025	01:00 PM	03:00 PM	20	2	1	2

Key Points

EventID:

- Must match an existing event on your account.
- You can find the EventID in the event's Scheduling Link or under Reports.

Resource:

- Must match the resource name as defined in your event.
- If the resource name does not exist or is misspelled, the import will fail.

Time Format:

- Use **12-hour format with AM/PM** for StartTime and EndTime.
- Make sure the duration fits evenly into the total time range.

Max:

- Defines how many appointments can be booked in the same time slot.
- Example: A Max of 2 allows two people to book the same time.

SlotTypeId:

- Controls how the slot appears to customers on the booking page.
- If omitted, the slot will default to **Visible to Customer (1)**.
- Use **Make Unavailable (4)** to block time without showing it to customers.

SlotApptTypeId:

- Specifies whether the appointment is offered in-person, virtually, or both.
- If omitted, the slot will default to **In-Person (1)**.
- Use **In-Person or Virtual (3)** to let customers choose their preferred format at booking.

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers labeled exactly as listed above
- How to Create:
  - In Excel: Save as Text (Tab delimited) (*.txt)
  - In Google Sheets: File → Download → Tab-separated values (.tsv)

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2 - Import Your File

1. Go to pickatime.com and log in from the Login section
2. On the left navigation bar, select Importer
3. Set the Data Type to Slots.
4. Browse your computer and select your prepared tab-delimited file.
5. Click Import.

Where to Check Imported Slot Data in the Admin UI

After importing:

1. Go to Event Management → Open the Event.
2. Click on Time Setup or Schedule Setup.
3. Select a Resource and a Date to confirm the slots appear as expected.

Events File

The **Events File** allows you to import either *Normal Events* (with appointment slots) or *Roster Events* (registration-style events) into pickAtime. This document outlines the required format and instructions for both types.

File Format

- File Type: Tab-delimited text file (*.txt or *.tsv).
- First Row: Must contain column headers.
- Example Tools: Export from Excel or Google Sheets as Tab-delimited Text.

Importing Normal Events

1 – Create Your Event File

Each row represents one set of time slots for an event.

Required Columns:

- **EventName** - The name of your event (e.g., “Vision Screening”).
- **EventDate** - The label shown in the Event Setup page (e.g., “March 2025”).
- **Location** - The physical or virtual location where the event is held.
- **TimeZone** - Time zone in which the event occurs (e.g., “America/New_York”).
- **Resource** - The name of the resource involved in the event (e.g., “Nurse”).
- **Date** - The calendar date for the appointment slots (format: MM/DD/YYYY).
- **StartTime** - Start time for the first appointment slot (format: HH:MM AM/PM).
- **EndTime** - End time for the last appointment slot (format: HH:MM AM/PM).
- **Duration** - Duration of each appointment slot in minutes (e.g., 10).
- **Max** - Maximum number of appointments allowed per slot.
- **basedEvent** - (Optional) ID of an existing event to use as a template.
- **Category** - (Optional) Category label for the event.
- **Description** - (Optional) General description or details about the event.
- **ResourceDescription** - (Optional) Description of the resource, such as qualifications or instructions.

2 – Import Your File

1. Go to pickatime.com and log in.
2. From the left-hand menu, select Importer.
3. Choose Data Type: Events.
4. Choose Event Type: Normal.
5. Locate your file and import it.

Important Notes

- If multiple rows in your import file share the same EventName, pickAtime will append the slot data to the existing event. It will not create duplicate events.
- To create two distinct events with the same name, each must be given a unique EventName (e.g., “Bellevue Screening 1”, “Bellevue Screening 2”).

Importing Roster Events

1 – Create the Roster Event File

Each row defines one registration-type event (not based on appointment slots).

Required Columns:

- **EventName** - The name of your event.
- **EventDate** - The label shown in the Event Setup page.
- **Location** - The location of the event.
- **TimeZone** - The time zone of the event (e.g., “America/Denver”).
- **Max** - Maximum number of participants allowed in the event.
- **basedEvent** - (Optional) ID of an event to use as a template.
- **Category** - (Optional) Category label for your event.
- **Description** - (Optional) Description or event details.

2 – Import Your File

1. Log in at pickatime.com
2. From the left-hand menu, select Importer.
3. Choose Data Type: Events.
4. Choose Event Type: Roster.
5. Locate your file and import it.

Important Notes

- If multiple rows in your import file share the same EventName, pickAtime will append the slot data to the existing event. It will not create duplicate events.
- To create two distinct events with the same name, each must be given a unique EventName (e.g., “Bellevue Screening 1”, “Bellevue Screening 2”).

Import Error Messages

Student File Error Messages

"The file does not have a column labeled 'First' or 'First Name'"

This error occurs when the system cannot locate the required First column in your Student file. The column title may be missing or incorrectly labeled.

How to Fix:

1. Open your Student file in a spreadsheet application.
2. Verify that the first row contains a column labeled First (case-sensitive, no spaces).
3. Correct any discrepancies, such as using "First Name" instead of "First."
4. Save the file in a tab-delimited format and re-import it.

"The file does not have a column labeled 'StudentID'"

This error occurs when the system cannot find the mandatory StudentID column. This column is used to uniquely identify each student.

How to Fix:

1. Open your Student file and check that the first row contains a column titled StudentID (case-sensitive, no spaces).
2. If the column is missing, add it and populate it with unique IDs for each student.
3. Save the file in a tab-delimited format and re-import it.

"The ID field is empty for XX"

This error indicates that one or more rows in the Student file have an empty StudentID value. Every student must have a unique identifier.

How to Fix:

1. Open your Student file and locate the row(s) where the StudentID is missing (indicated by XX in the error message).
2. Add a valid, unique StudentID for the affected rows.

3. Save the file in a tab-delimited format and re-import it.

"SecurityValue is empty for StudentID = XXXX"

This error occurs when the SecurityValue field is blank for a specific student. The SecurityValue is required for parents to identify their child when signing up.

How to Fix:

1. Open your Student file and locate the row with the StudentID mentioned in the error message (XXXX).
2. Verify that the SecurityValue column is populated with the appropriate value (e.g., date of birth in the date format i.e. mm/dd/yyyy).
3. Correct any missing or invalid data in the SecurityValue column.
4. Save the file in a tab-delimited format and re-import it.

Parent File Error Messages

The file does not have a column labeled "First" or "First Name."

This error occurs when the Parent file is missing the required column for the parent's first name. The column must be labeled First or First Name, exactly as specified.

How to Fix:

1. Open your Parent file.
2. Check the column headers to ensure you have a column labeled First or First Name.
3. Update the column header if it does not match the required label.
4. Re-import the file.

Parent-Student Relationship File Error Messages

Could not find Parent with ID 'XX' or Student with ID 'YY', as this parent/student was not imported

This error indicates that the **ParentID** or **StudentID** listed in the **Parent-Student Relationship** File does not match any record in the imported **Parent File** or **Student File**.

Example:

- If the ParentID in the relationship file is 12345 but no parent with this ID exists in the Parent File, the system will flag this error.
- Similarly, if the StudentID is 67890 and it doesn’t exist in the Student File, this error will appear.

How to Fix

1. Verify the Parent File - open the Parent File and confirm the ParentID XX exists and was correctly imported.
2. Verify the Student File - open the Student File and ensure the StudentID YY exists and was correctly imported.
3. Update the Relationship File - correct any mismatched or missing ParentIDs or StudentIDs in the Parent-Student Relationship File.
4. Re-import the corrected files - import the Parent File and Student File first, followed by the Parent-Student Relationship File.

Teacher File Error Messages

"Found contact with teacherID of ABC and a different contact with email of betsy@noemail.com"

This error occurs when the Teacher file contains a row where the **TeacherID** and **Email** combination conflicts with existing records in the Admin UI. Specifically:

- The system finds one contact with the TeacherID but a different email address.
- The system also finds a separate contact with the same email address but a different TeacherID.

For example:

Import File:

TeacherID	Email
ABC	betsy@noemail.com

Admin UI Records:

TeacherID	Email
ABC	annie@noemail.com
DEF	betsy@noemail.com

How to Fix:

1. Log in to the Admin UI and search for the conflicting contacts.
2. Identify whether the conflicting contact is outdated or incorrect.
3. If the contact is no longer valid, delete the old contact from the Admin UI.
4. Ensure that the Teacher file has accurate and consistent information for each TeacherID and Email.
5. Re-import the updated Teacher file.

Important Note:
During the import process:

- If a match is found by TeacherID, the system updates the associated email and name.
- If a match is found by Email, the system updates the associated TeacherID and name.
- If both a TeacherID and an Email match different contacts, the system flags this error to prevent unintended updates.

"The ID field is empty for XX."

This error indicates that one or more rows in the Teacher file have an empty TeacherID. This field is required to uniquely identify each teacher.

How to Fix:

1. Open your Teacher file in a spreadsheet application.
2. Locate the row(s) with the empty TeacherID (indicated by XX in the error message).
3. Add a unique TeacherID for each affected row.
4. Save the file in a tab-delimited format and re-import it.

"The password field should be 6 characters or more for XX"

This error occurs when the Password field for one or more teachers contains a value shorter than six characters.

How to Fix:

1. Open your Teacher file and locate the row with the TeacherID mentioned in the error message (XX).
2. Ensure that the Password column contains a value with at least six characters for all teachers.
3. If no password is provided, consider leaving the field blank. In this case, teachers will be prompted to create a password when they first log in.
4. Save the file in a tab-delimited format and re-import it.

> These detailed explanations and steps should help you resolve any errors encountered when importing the Teacher file.

Class File Error Messages

"Could not find teacher with teacherID XX"

This error occurs when the Class file references a teacherID that is not present in the Teacher file. The system matches each class to a teacher using the teacherID. If the teacher has not been imported from the Teacher file, the class cannot be imported.

How to fix:

1. Open your Teacher file and check for the teacherID listed in the error message (XX).
2. If the teacher is missing, update your Teacher file to include the correct teacherID and re-import it.

"Class 'Math' already exists with a different teacher than '123'"

This error indicates that your **Class file** includes a row with the ClassID “Math” and the TeacherID “123,” but “Math” has already been assigned to another teacher.

The **ClassID** must be unique for each teacher. Duplicate ClassID entries for different teachers can cause conflicts, particularly when importing Enrollment files, as the system cannot distinguish which students belong to which teacher.

Example:

TeacherID	ClassID
123	Math
456	Math

> The system will flag the second row as an error because the ClassID “Math” is already assigned to teacher 123.

How to Fix

To resolve this issue:

- Ensure that the ClassID is unique for each teacher. For example, append a section number or teacher identifier to the ClassID:

TeacherID	ClassID
123	123_Math
456	456_Math

- Update your Enrollment file to reflect the modified ClassID.

Prior to fixing your import files and importing again, you will want to remove ClassID Math.

You can remove an individual class by going to the ClassEditor, selecting the 'Show only Classes', locating and then clicking the red X next to the name, or you can select all of the affected classes and then click delete.

You can also delete all of the event's resources, classes, and enrollments from the Import page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu, then click 'Remove existing Classes'.

Important Note

> If the ClassID (e.g., “Math”) has already been imported with teacherID 123, you must first remove it before re-importing your corrected Class file.

> If the errors you got through the import are related to the teachers/classes who will not participate in the conference event, then you can ignore these errors and move forward to the Enrollment file import.

Enrollment File Error Messages

"Student ID not found."

This error occurs when the Enrollment file contains a **StudentID** that does not exist in the **Student** file. The **Enrollment** file relies on the **StudentID** to match with a corresponding student already imported.

How to Fix:

1. Ensure that the Student file has been imported before the Enrollment file.
2. Check the Enrollment file for the StudentID listed in the error message.
3. Verify that the StudentID exists in the Student file. If it's missing:
   - Add the missing student to the Student file.
   - Re-import the updated Student file before importing the Enrollment file again.

"Class XX not found."

This error indicates that the ClassID in the Enrollment file does not exist in the Class file and was not imported on the previous step.

How to Fix:

1. Verify that the Class file has been imported before the Enrollment file.
2. Check the Enrollment file for the ClassID listed in the error message.
3. Confirm that the ClassID exists in the Class file. If it's missing:
   - Add the missing class to the Class file.
   - Re-import the updated Class file before re-importing the Enrollment file.

> **Note**: If the class in question (e.g., Study Hall) does not require conferencing, you can ignore this error.

"No class ID found for student XX"

This error occurs when a row in the Enrollment file has a StudentID but does not contain any ClassID.

How to Fix:

1. Open your Enrollment file and locate the row with the specified StudentID.
2. Add the missing ClassID for that student.
3. Save the file and re-import it.

"Student XX not in class YY."

Description:
This error appears when you attempt to delete an enrollment, but the specified student (XX) is not currently enrolled in the specified class (YY).

How to Fix:

1. Verify the Enrollment file and confirm the student's current class enrollment status.
2. Remove or correct the row in the Enrollment file attempting to delete the enrollment.

"Class XX has reached maximum enrollment. Student XX has been skipped."

Description:
This error occurs when a class has reached its maximum allowed enrollment, and additional students cannot be added.

How to Fix:

1. Go to the Class Editor page in the Admin UI.
2. Select the teacher and then the class.
3. Review the "Maximum" column to check the current limit.
4. If necessary, increase the maximum enrollment number for the class.
5. Re-import the Enrollment file.

> These explanations and solutions should help you resolve common errors when importing **Enrollment** files.

Appointments File Error Messages

"Event not found. EventID: XX"

This error occurs when the EventID in your Appointments file does not match any existing event on your account. This could mean the EventID is incorrect or the event has been deleted.

How to Fix:

- Verify the correct EventID by going to **Event Management / Settings / Online Scheduler Settings > Scheduling Link**.
- Copy the EventID from the scheduling link URL and update your Appointments file with the correct value.

"Resource not found. Resource: XX"

This message indicates that the Resource name in your Appointments file does not match any existing Resource in the event.

How to Fix:

- Go to the event in your Admin UI and review the list of Resources.
- Make sure the Resource name in your file exactly matches (including capitalization and spacing) the name listed in the system.

"There is no person with ID: XX."

This message appears when the Appointments file includes a person ID that was not previously imported in the People file.

How to Fix:

- Open your People file and confirm the ID listed in the error message is present.
- If the person is missing, update your People file and import it before importing appointments again.

"There are no slots at 'date' for person with ID: XX."

This error means that the system could not find an available appointment slot at the specified date and time for the given person.

How to Fix:

- Review the schedule for the selected event and resource.
- Ensure there are open appointment slots at the specified date and time.
- Update your Appointments file with a valid date/time that corresponds to an available slot.

"Incorrect phone number"

This message indicates the phone number provided for SMS reminders is not in a valid format.

How to Fix:

- Make sure the phone number contains 10 digits (e.g., 1234567890 or (123)456-7890).
- Avoid using letters or special characters (other than parentheses or dashes).

"Person with ID: XX has an appointment at this time."

This message indicates a conflict - this person already has an appointment scheduled at the specified time.

How to Fix:

- Check the person’s existing appointments.
- Either change the appointment time in your file or cancel the conflicting appointment in the Admin UI.

"Person with ID: XX can't create an appointment in the past."

You cannot import appointments set in the past.

How to Fix:

- Review the Date column in your file.
- Make sure all appointments are scheduled for current or future dates/times.

"Person with ID: XX too many appointments per event."

The person has already reached the maximum number of appointments allowed for the event.

How to Fix:

- Review the event settings and check the maximum number of appointments allowed per person.
- Either increase the limit in the event setup or reduce the number of appointments in your import file.

"Person with ID: XX too close to previous appointment."

This error appears when two appointments for the same person are scheduled too close together.

How to Fix:

- Review the time spacing between appointments for the same person.
- Adjust the appointment times to meet the minimum required gap between appointments, as defined in your event settings.

Slots File Error Messages

"Event not found. EventID: XX"

This error occurs when the EventID in your Slots file does not match any existing event on your account. It may be due to an incorrect ID or a deleted event.

How to Fix:

- Go to **Event Management / Settings / Online Scheduler Settings / Scheduling Link** .
- Copy the EventID from the URL of the event's scheduling link and use it in your import file.

"Cannot create a slot for this type of event. EventID: XX"

This error appears when you attempt to import time slots into a Roster event. Roster events do not support time-based appointments.

How to Fix:

- Confirm that the event is set as a PTA or Normal event. Only these types support time slots.
- If needed, create a new event with the correct type and re-import your slot file.

"Resource not found. Resource: XX"

This error means the resource listed in your file does not match any existing resource in the event.

How to Fix:

- Check the spelling, capitalization, and spacing of the resource name in your file.
- Go to the event setup screen and confirm the resource exists with the exact same name.

"Resource: XX has a slot at this time."

This message indicates that the resource already has an existing slot at the specified time. The system does not allow overlapping or duplicate slots.

How to Fix:

- Check the event’s existing slot schedule for the specified time.
- Remove or update the conflicting slot from your import file.

"Cannot create a slot for the specified time interval for resource XX. Error code - 103."

This error appears when the duration of a slot in your file does not match the time interval settings of the event.

Example:
If the event uses 15-minute intervals but your file specifies a 20-minute duration, this error will occur.

How to Fix:

- Go to the event’s time slot configuration and verify the interval setting.
- Adjust your file so that the slot durations match the expected time increments (e.g., 15, 10, or 5 minutes).

Events File Error Messages

"Event not found. EventID: XX"

This message indicates that the Event ID is either incorrect or the event has been deleted.

How to Fix:

Go to **Event Management /Settings/ Online Scheduler Settings /Scheduling Link** and copy the correct Event ID from the URL shown in the Scheduling Link for the selected event. Use that ID in your import file.

"Could not find based event with ID XX"

This message means the baseEvent ID listed in your file does not match any existing event, or the referenced base event has been deleted.

How to Fix:

Locate the correct Event ID in the same way as above, and ensure the base event still exists in your account. Update the basedEvent column with the correct ID.

"Cannot create a slot for EventID: XX. Date column contains an invalid value. Error code = 107."

This error occurs when the Date field contains an improperly formatted or unrecognized value.

How to Fix:

Verify that the Date is in a valid format, such as MM/DD/YYYY (e.g., 10/23/2020). Ensure there are no extra characters or missing values in the date cells.

"Cannot create a slot for EventID: XX. The start time / end time column contains an invalid value. Error code = 108."

This message indicates that either the StartTime or EndTime fields have incorrect or missing values.

How to Fix:

Ensure that time values are in a supported format, such as 9:00 AM or 2:30 PM. Avoid 24-hour clock times or missing AM/PM markers. Confirm that StartTime is earlier than EndTime.

"Could not find the timezone with name XX."

This error means the value entered in the TimeZone column does not match a recognized time zone name.

How to Fix:
Use a valid time zone from the IANA time zone database, such as:

- America/New_York
- America/Chicago
- America/Denver
- America/Los_Angeles

> ***NOTE: Double-check spelling and capitalization. Avoid abbreviations like "EST" or "PST".***

General Error Messages

"The file does not match the 'X' File type to import or has an incorrect file type.

Your file must be a tab - delimited text file (*MS Excel -> *.txt (Tab delimited); Google Sheets -> *.tsv (Tab delimited)).*"

Make sure your file is one of the two allowed file types listed in the error message.