

STEP TWO: Import Data Files

Data Files

There are 4 required data files for the Parent Teacher Appointments Scheduler: a Student file, a Teacher file, a Classes file, and an Enrollment file. Optionally you can create a Parent File and a Parent Student Relationship File. Generally, the Parent File and the Parent Student Relationship File are only used when you are setting up a Single-Sign On Option.

Student File

This file lists all the students.

The student file must contain the following fields:

- **StudentID** identifies the student
- **First** contains the first name of the student
- **Last** contains the last name of the student
- **SecurityValue** is the value that a parent will enter to identify their child when they first sign up. For example, the SecurityValue could be the student's birthday, and you would then prompt your parents to enter in a birthday in a predetermined format (e.g. dd/mm/yyyy). The SecurityValue prevents a parent from entering an incorrect StudentID and accidentally selecting the wrong child.

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

This table must be provided in a *tab-delimited text* file (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

Do not recycle StudentID's without first removing existing students. For example, if StudentID 101 last year was assigned to Betsy Smith, and this year StudentID 101 is assigned to William Johnson, the parent of Betsy Smith will log in this year and see student William Johnson listed as her child.

If you will be recycling student IDs, prior to uploading your new student file, remove all stored contacts. You can do this on the Global Setup / Contacts Setup page under 'removeall contacts.'

Key

StudentID is the key field on this file and must be unique.

Other Columns

A column called **Action** can be created in order to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. *The Action column is only needed if you will be deleting data.*

Teacher File

This file lists all the teachers. The teacher file must contain the following fields:

- **TeacherID** identifies the teacher
- **First** contains the first name of the teacher
- **Last** contains the last name of the teacher
- The **email** contains the teacher's email address. Only one email address should be entered here.
- The **room** is where the teacher will be at the parent-teacher conferences. This does not have to be the same room that the class is held in. This field can be helpful for reporting purposes. If you use this field, you can then produce a report by room number.

TeacherID	First	Last	Email	Room
234	Angela	Frank	a@school.com	106
225	Bobby	Smith	b@school.com	Library

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

Key

TeacherID is the key field on this file and must be unique.

Email must also be unique.

IMPORTANT NOTE: If you would like to create team conferences, please see the section on Creating Teams.

Other Optional Columns

Password creates an initial password for your teachers. If you do not import a password when the teacher logs in, they will be prompted to create a password. The password must be at least 6 characters in length.

Once the teachers have taken ownership of their account and created a password, the import will not change the password. However, on the Global Setup / Contacts Setup page, you can reset the password for all your teachers. This is the reset administrative password button.

Virtual Room is used to import an online meeting link for the teacher if you are having Virtual Conferences or allowing a choice of In-Person or Virtual conferences. It is only used when you are creating your own meeting links for your teachers. If you are using the pickAtime integration for online meetings, the link will be generated automatically.

AccessLevel allows you to set the Admin level for your teachers. An AccessLevel of 3 will provide your teachers with Resource Administrator access, and they will then be able to block their own schedule. The default access level for a teacher is Appointment Viewer.

GroupName allows you to classify a teacher with a GroupName (e.g., Middle School Teacher, Science Teacher). This is useful if you want to create different slots for different groups of teachers. For example, if all your Middle School Teachers needed 15-minute slots and all your High School Teachers needed 20-minute slots, you might set a group name for your teachers and then create slots for the entire group. The Group Name can also be used on the parent scheduling page to display teachers under the Group Name.

A column named **Action** can be created to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. *The Action column is only needed if you will be deleting data.*

Class File

This file defines the classes. The class file must contain the following fields

- **ClassID** identifies the class.
- **TeacherID** identifies the teacher; this field must match the TeacherID listed in the teacher file
- **ClassName** is an optional field and provides a name for the class. This name can be displayed on the CUI legend. For example, if you have multiple sections of Math, each with a different ClassID, you might want to import a field for the Name with the value "Math."

GroupName is an optional field and allows you to categorize your teachers with a Group Name. For example, you might want to categorize some teachers as Upper School teachers and some as Lower School teachers. This will allow you to create different time slots for different groups of

teachers easily.

ClassID	TeacherID	ClassName
Math - Sec200	234	Math
Math - Sec201	235	Math

This table must be provided in a tab-delimited text file (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

The first row should contain the column titles. The column titles must be labeled exactly as listed above. Notice that none of the column titles has spaces in them.

Key

ClassID is the key field on this file and must be unique for each teacher. Each **ClassID** should only exist in one row in this file.

Keep in mind that the **ClassID** has to be unique for each teacher. If your database has one "English 9" class with multiple sessions each taught by a different teacher, then you will need a different **ClassID** for each teacher. You can concatenate your database's class identifier with the teacher ID to produce something like "Eng9-869," indicating that this is the English 9 class taught by teacher 869. If you do this, then make sure that the enrollment file has "Eng9-869" in it, not "English 9" or "Eng9".

Other Columns

These columns can optionally be used.

A column called **Action** can be created in order to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. The **Action** column is only needed if you will be deleting data.

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

Max is the largest number of students that could sign up for the class. This must be larger than the number of students that are in the class. If this column is not present, a very large number is the default.

Enrollment File

This file specifies the classes each student is enrolled in. The enrollment file must contain the following fields

StudentID identifies the student; this must match the **StudentID** listed in the student file

ClassID identifies the class; this must match the **ClassID** listed in the class file

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

The first row should contain the column titles. The column titles must be labeled exactly as listed above.

Notice that none of the column titles has spaces in them.

Your file can be formatted in one of two different ways.

Option # 1

With this option, only one class is listed in the **ClassID** column. If a student has multiple classes you will have multiple rows for each student.

StudentID	ClassID
123	English-SecB
123	Science

Option # 2

StudentID	ClassID	ClassID
123	English-SecB	Science
456	Math	Gym

There is only one row per student. Each class is in a separate column labeled **ClassID**

Other Columns

A column named Action can be created to delete an existing entry. If you need to delete previously uploaded data, you could resubmit the data file with this column title and the word delete entered in each row. This column defaults to "update" if the column is not present. The Action column is only needed if you will be deleting data.

Creating Teams - You can either create teams via the import files or after you have imported your files.

Creating Teams via the Import Process - There are two different ways to accomplish this. The way you select depends on how you will be importing your data, and whether the teachers within a team will also have individual conferences.

Use the first method if you will be importing team data rather than individual teacher data, and your teams will not have any teachers needing to conference on their own. Use the second method if you will be importing individual teacher data, and you would like to combine some of these teachers into teams.

Method 1

Using this option, you will create a new teacher with a team name such as Team Smith-Jones. This team teacher would need to create a class that has all students for teacher Smith and teacher Jones within the class. When the parent logs in, they would see the teacher "Team Smith-Jones" listed. When using a team such as team Smith-Jones, you need to make sure that teacher Smith and teacher Jones are not also available for conferences at the same time as teacher Smith-Jones.

When you import data for teacher Team Smith-Jones, you will need to import a TeacherID. This can simply be a made up teacherID, but it can not be a teacherID that has been imported for another teacher. You can choose to import the email address of one of the two teachers, or leave the email field blank. However, you can not import an email address that has already been imported for another teacher. The email address AND the teacherID must be unique for each teacher. See example below:

Once you have created and imported the data for a team teacher, you can provide the two individual teachers access to the schedule for the team. You would do this by going into the Contacts section of Admin UI. In the upper left hand side, search for the first teacher name (ex. Smith). When you find teacher Smith and have this teacher's information in the right hand side, in the Resource Access section, give teacher Smith access to teacher Team Smith- Jones. Then you would do the same for teacher Jones. If data for teacher Smith or teacher Jones had not been imported individually, you can use the Contacts section of the site to add the two teachers and give them each access to the team.

Method 2

You can create teams by combining two or more teachers. When you import your class file, in the TeacherID column, concatenate your teacher IDs. Below you will see a Teacher File example and a Class File example.

Teacher File

TeacherID	First	Last	Email
T123	Anne	Smith	asmith@school.com
T124	Harold	Rice	hrice@school.com

Class File

TeacherID	ClassID
T123;T124	Math101

T123	Biology
T124	English

In the above example, the school has two teachers, Anne Smith and Harold Rice. These two teachers team teach a class called Math 101. A parent with a student in Math101 will book an appointment with the team, a parent with a student in one of the two individual classes will book with the individual teacher. When a parent of a student in Biology books with teacher Anne Smith, that corresponding slot for the team of Anne Smith and Harold Rice will be blocked off.

The creation of team teachers and team classes can also be used when you would like to allow some parents to book with teachers jointly, and some parents to book with teachers separately. One example might be where you have some students in a class where you would like the special education teacher to also attend conferences. On your class file, you could create a new class labeled English/Special Education and assign the teacherID to the two teachers, the English teacher and the Special Education teacher. Then on the enrollment file, you would assign some students to the English/Special Education class and some to the English class.

Creating Teams after the Import Process

You can also combine teachers into teams after you have imported your four data files. To create a team, you will do the following:

1. Go into **Class Editor**
2. Select **Add Teacher/Team**
3. The **Select Person** dialog box will display
4. In the **Select Person** dialog box that displays, search and click on the first teacher you would like on your team, then click on the 'Add to Team' button on the **Select Person** pop-up window in the top left corner. Then search and click on the 2nd teacher you would like in the team, then click on the '**Add to Team**' button.
5. Once your team is selected, all team members will be listed in the top-left corner of the Select Person pop-up window - press the **Ok** button.

You would then want to either manually create a class for that team or import a class and corresponding enrollment for that team. Or, if you already have the classes you would like for the team listed under another teacher, you can simply move the classes to the team.

When a parent books with the team, the corresponding time slots for all individual members of the team will become unavailable. Similarly, when a parent books with an individual teacher, the corresponding time slot for the team will become unavailable.

If you would like a room number for your team, you will need to add this on the Appointments page. To the right of your team name, enter a room number.

Parent File (optional file only required for Single Sign On)

This file lists all the parents. The parent file must contain the following fields:

- **ParentID** identifies the parent
- **First** contains the first name of the parent
- **Last** contains the last name of the parent
- The **email** contains the parent's email address. Only one email address should be entered here.

ParentID	First	Last	Email
123	John	Smith	js@parent.com
456	Susie	Smith	ss@parent.com

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

If you do not want your parents to have the option of attaching their student to their account, then turn this option off. This is set on the **Global Setup / Business Setup** page. Under **Miscellaneous**, uncheck the box "*allow parents to attach and detach students.*"

The ParentID and the Email address should be unique. If you have multiple rows with the same ParentID, only one contact will be created, as each row will update what was previously imported. If you have multiple rows with the same Email, only one contact will be created, as each row will update what was previously imported.

Parent Student Relationship File (optional and only required for Single Sign On)

This file connects the parents to the students. The parent-student relationship file must contain the following fields:

- **ParentID** identifies the parent
- **StudentID** identifies the student

StudentID	ParentID
37890	4451
37891	4478

This table must be provided in a *tab-delimited text file* (MS Excel -> *.txt (Tab delimited); Google Sheets - > *.tsv (Tab delimited)).

Mistakes to Avoid

- Don't export an entire year of class data when you just want half a school year.
- If you use a school management database identifier for the StudentID, and your parents are not familiar with this number, then use a concatenation of the student's first name

and last name (ex, "BenFranklin") when you prompt your parents to identify their student. You do not need to create this concatenated field; simply check the box "Use First + Last Name as StudentID" in the Parent Login section of the Global Setup / Business Setup page. Then, on the label for this field that your parents will see on the Customer User Interface, enter text describing this field to your parents. For example, you can enter the following text for your prompt: "First Name + Last Name, e.g. " "BenjaminFranklin" You would enter this text in the CUI Messages / Student / StudentID label (see CUI Messages page).

- Be careful with leading zeros on numeric IDs. For example, if you use Excel to open a text file that has studentIDs that are all numeric and have leading zeros, the zeros will be stripped off when you save the file.
- If your student IDs have changed from the previous year, you will need to make sure that you remove the previous year's stored student data. See the section on removing contacts on the [Previous Users of pickAtime page](#).
- If your student IDs are simply a number you have assigned to each student, and that number may change each year, make sure you have removed the previous year's stored student data. See the section on removing contacts on the [Previous Users of pickAtime page](#).
- 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.

Make sure you use our naming convention when you are importing Emails. The column should be labeled Email. For example, if you import a column labeled Email_Address, Teachers_Email_Address, or anything labeled other than Email this column will be added but will not be considered the Email to be used for the Teacher or Participant to use as their login Email.

Import Process

Once you have created your 4 import files, you are ready to import these files to your pickAtime account. All 4 files must be tab-delimited text files. Locate the Importer under Main Navigation on the left side.

1. After logging into pickAtime, click Importer.
2. Select Data Type of School.
3. Select your event from the Event pull-down.
4. Set the File Type to students
5. Click Browse and locate your student file on your computer
6. Click on Import

If you have no errors on your import, repeat steps 4 - 6 for your teacher file, your classes file, and your enrollment file, changing the File Type drop-down to the correct type for your file.

For all 4 data files, the data type should be set to School.

If you have any error messages on the import, read that section in the manual.

Keep in mind that each row in the four tables has a unique identifier, which ensures that if you import the same data more than once no harm will be done. The system does not create new data entries each time the data is imported. It first checks to see if it has the data row you are importing (by matching the key field), then it either updates the existing data or it creates a new record.

If you leave out some data, you can simply import the missing data.

IMPORTANT NOTE: Please be sure that the number of rows imported matches the number of rows on your data file.

- If you receive any errors when importing your teacher file, correct these before importing your class and enrollment files.
- If you receive any errors when importing your class file, correct these before importing your enrollment file.
- You can delete existing resources, classes, and enrollments from the Import page, making it easier to remove bad/old data without navigating away from the Importer page. To do this, on the Imports page, click the Class file option within the File Type drop-down menu.

The screenshot shows the Importer interface. On the left is a dark sidebar with navigation options: Online Meeting Issues, Appointments List, Contacts, Mail Center, Importer (highlighted), Global Setup, and Calendar Sync. The main form area has the following fields:

- Vendor:** Maypine School
- Data Type:** Radio buttons for School (selected), People, Appointments, Slots, and Events.
- Event:** Maypine PTA (dropdown menu)
- File Type:** Class (dropdown menu)
- Remove existing classes:** A checkbox with a question mark icon, highlighted by a red circle.
- File:** Two buttons: File Template (green) and Select File and Import (blue).

Error Messages on Import

General Error Messages

Incorrect file type was supplied.

The file must be a tab-delimited text file.

Make sure that you have created and are importing a tab-delimited text file.

Error messages when importing Student File

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

Check the labels you have created for each column in your file. They must match exactly our specifications. For example the studentID column needs to be labeled 'StudentID' not something else such as 'Student Lunch Number'.

The ID field is empty for XX

Check the file to confirm that the column has data (first name, last name, studentid, date of birth) within it.

Error message when importing the Teacher file

Found contact with teacherid of ABC and a different contact with the email of betsy@noemail.com

This message indicates that you have a row in your teacher file with teacherID ABC and email address betsy@noemail.com.

However, in the Admin UI, you already have a contact with a teacherID of ABC and a different email address than betsy@noemail.com, AND a contact with the email address of betsy@noemail.com and a different teacherID than ABC.

For example, on your import file, you have this:

TeacherID Email

- ABC betsy@noemail.com

But in the Admin UI, you have two different contacts.

TeacherID Email

- ABC annie@noemail.com
- DEF betsy@noemail.com

You need to correct your data in the Admin UI and then re-import your teacher file. In the Admin UI, search for the contact with that email address that was flagged. If the contact you locate has a different teacherID than on your teacher file, and is an old contact, then delete that contact and re-import your teacher file.

During the teacher file import, we look for a matching teacherID record or a matching email address record. If we find a match on either, we update the rest of the information. For example, if we find a matching teacherID, we update the email address and name of the teacher. If we find a matching email address, we update the teacherID and the name of the teacher. However, if we find two different contact records, one with a matching teacherID and one with a matching email address, we do not know which one should be updated, and we flag this error.

The ID field is empty for XX

Check the file to confirm that the column has data (first name, last name, email) within it.

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

Check the file to confirm that the password column has the correct password data within it.

Error messages when importing the class file

Could not find teacher with teacherID XX

This error message comes up when importing a Class file with a teacherID which is not on the Teacher File. The Classes file will match each class to a teacher. If the teacher was not previously imported into the teacher file, then no match will be found, and the class will not be imported. Take a look at your Teacher file and make sure the TeacherID listed in the error message exists on the Teacher file.

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

This means that your class file has a row with ClassID: Math and TeacherID: 123. But, Class Math has already been assigned to a different teacher than teacherID 123. The ClassID must be unique for each teacher.

For example, if you have two rows such as:

TeacherID ClassID 123 Math 456 Math

We will flag the second row as an error. The ClassID must be unique for each teacher, otherwise when we import the enrollment file, we do not know which students in class Math have teacher 123 and which students in class Math have teacher 456. You will need to make the ClassID unique by either appending a section number to the ClassID or a teacher identifier to the Class ID. Your enrollment file will also need to be updated to reflect this.

Also note that in the example above, ClassID Math has been added to teacherID 123. 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.

You can delete all of the event's resources, classes, and enrollments from the Import page as well, making it easier to remove the bad/old data without navigating away from the Importer 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'.

Error messages when importing the Enrollment file

Student ID not found

This error message comes up when importing an enrollment file that contains a StudentID that does not exist on the Student File.

The enrollment file must be imported after the student, teacher, and class files have been imported. When you import the enrollment file, the student ID needs to find a match to a student in the student file. The error message: Student ID not found means that the Student ID in the enrollment file did not have a corresponding Student ID in the student file.

Example: an error message of Student 12345 not found means that a student with the StudentID of 12345 was NOT imported on your student file.

Class XX not found

This error message indicates that your enrollment file contains a ClassID that was not on the Class File. Take a look at your Class file and make sure that the ClassID listed in the error message exists on the Class file. Note that if you are receiving this error message on classes that you do not care about, and where the teachers will not be conferencing (for example, a Study Hall) then you can ignore these messages - they do not need to be corrected.

Example: an error message of Class Math-101 not found indicates that Class Math-101 was NOT imported into your Class file.

No class ID found for student XX

This message indicates that you have a row with a StudentID that does not contain any ClassIDs.

Student XX not in class YY

This message comes up when you are deleting enrollment, and indicates the student XX was not found in class YY.

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

This indicates that you have set a maximum allowed enrollment for the class and you are importing more rows than the allowed amount. Go into the Class Editor page, click on the teacher and then the class. Check the # you see in the Maximum column and see if this is set correctly.

Error message when importing Parent File

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

Check the labels you have created for each column in your file. They must match our specifications exactly.

Error message when importing Parent Student relationship file

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

This error message indicates that either the ParentID as listed on your parent-student relationship file was not found or the StudentID as listed on your parent-student relationship file was not found. Refer back to your Student file or your Parent file to make sure the parent and the student were imported.

How to Correct Bad Data

STUDENT FILE

My students names were reversed

Simply correct your file and re-import.

My student ID's were incorrect

Take your incorrect file, add a new column labeled Action, and fill this with the word Delete. Then re-import this file. This will remove all your incorrectly imported students.

I forgot the SecurityValue field

Simply add the field to your file and re-import.

My file was missing some students

Import your student file again with the newly included students. Then also import your enrollment file to add in the enrollment for these students.

TEACHER FILE

For teacher file import issues, how you resolve these depends on whether you have already imported your class file. Once the class file has been imported your teachers are turned into a "resource" on the Appointments page and can not simply be updated with a new teacher file import. See the two different sections below.

WHEN YOU HAVE NOT IMPORTED YOUR CLASS FILE

My teacher names were reversed

Simply correct your file and re-import.

My teacher file was not correct, and I have not yet imported my class file

Take your incorrect teacher file, add a new column labeled Action, and fill this with the Delete. Then re-import this file. This will remove all your incorrectly imported teachers.

My teacher IDs are incorrect, and I have not yet imported my class file

Take your teacher file (with the incorrect teacher ID's) add in a column labeled Action, and fill this column with the word Delete. Then import this file to remove the incorrect teachers.

WHEN YOU HAVE ALREADY IMPORTED YOUR CLASS FILE

My teachers are not correct, and I have imported my class file

When your class file is imported, your teachers get placed on the Appointments page and on the Class Editor page.

If you have some teachers that you do not want, then you can go to the Class Editor page and remove teachers who are not participating in the conferences.

My teachers are assigned to the wrong classes? (see also below on the Class File import)

Go into the Class Editor and remove all your classes. Then import your class file again.

CLASS FILE

I imported the wrong classes? I imported too many classes?

Go into the Class Editor and delete all your classes or the classes you do not want.

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 them and then delete.

You can also delete all of the event's resources, classes, and enrollments from the Import page, making it easier to remove the bad/old data without navigating away from the Importer 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'.

On my class import, I received this message, "Class A already exists but with a different teacher than Teacher B."

This means that on your class file you have Class A listed in two different rows and belonging to two different teachers. The ClassID must be unique for each teacher. Take a look at the Class file and determine which is the correct teacher for Class A. If your 2nd reference is incorrect, then correct that row and re-import. If your first row was incorrect, then go into the Class Editor, click on the incorrect teacher for the class, and then click on the class. You can either delete the class or move the class to the correct teacher.

My classes are assigned to the wrong teachers.

Go into the Class Editor and remove all your classes. Then import your class file again.

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 them and then

delete.

You can also delete all of the event's resources, classes, and enrollments from the Import page, making it easier to remove the bad/old data without navigating away from the Importer 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'.

One class I imported was assigned to the wrong teacher.

The simplest solution is to go into the Class Editor and move the class from the incorrect teacher to the correct teacher. If you simply change your class file, you will be adding the correct class to the correct teacher, but the incorrect class - teacher assignment will not get removed.

I missed some classes.

Simply add to your class file and import again, or import a file with the missing classes.

ENROLLMENT FILE

I imported the wrong enrollment

I imported last year's enrollment data

Delete all your classes by going to the Class Editor. Then import your class file and a corrected enrollment file. My enrollment file did not include all enrollment. Simply import your enrollment file, with the newly included enrollment data.

HOW TO REMOVE IMPORTED DATA

To remove everything:

1. On the Events List page, create a new event and select the Add button using your last event as a template. Then delete the old event. This will delete your class and enrollment data.
2. Then delete the stored contacts on the account. These are the parent and teacher contacts, as they are on the account, not just the event. This is done by going into the Global Setup / Contacts page, selecting the Show advanced options... and clicking on the Remove all customers button. Select the level to delete of Event Administrator. Note that this will also remove parents.
3. To remove the student contacts, select the Remove students not enrolled in a class button. This may take a few minutes. You will have an empty event, and you can start over.

If your students and teachers are correct, and it is only the Class and Enrollment data that is not, you can simply do item 1 and not item 2.

To remove class data, but to keep the slots you have created for your teachers:

1. Go into the Class Viewer and delete all the classes. This will keep your teacher roster on the Appointments page and on the Class Editor page.
2. You will then need to import a new class file and a new enrollment file.

To remove student, teacher, class, and enrollment data, but not your parents:

1. On the Events List page, create a new event (select the Add button) using your last event as a template. Then delete the old event. This will delete your class and enrollment data.
2. Take your incorrect or recently imported student and teacher files, add a new column to them labeled Action. Fill this column with the word DELETE and re-import both files.

Frequently Asked Questions on School Data

We mistakenly imported the previous semester's data, but we have too many parent appointments to start over. Can we import new files?

You can import new data files. However, this will simply add to the existing data. For example, if your class and enrollment file now contain different classes, any new classes will be imported, but classes that were previously imported will not be deleted. To delete classes, you will need to do so in the Class Editor, or create a new data file listing your classes to delete and using the Action column filled with the word delete.

Note that a new import will not remove any parent appointments.

We re-imported our class and enrollment files as we needed to delete some classes. We don't see the changes in the Class Editor.

A new import will simply add to or update existing data. If you have classes to delete, you will need to delete them from the Class Editor page or by using the Action column in the Class File import. To delete via an import, you would add a column labeled Action and filled with the word Delete in the row for a class that you would like to delete.

To remove select enrollments, take your incorrect enrollment file, and add a column to it labeled Action. Fill this column with the word delete and then reimport the file. This will remove any matching enrollment records.

We realized that we were missing some class and enrollment data. Can we import a new class and enrollment file? Will this delete any parent appointments that have been booked?

You can import new data files. This will add any new class and enrollment data. It will not delete or disturb parent appointments that have already been booked.

View Your Data

Once you have imported your data, you should go to the Class Editor page to confirm that your data is correct.

1. From the Admin UI on the Events Preview page, select your event from the list and click on the button.
 2. Select the Class Editor tab. This tab will display your list of teachers. If you select a teacher's name from the left-hand side, then you will see the list of classes for the teacher. See the [Modifying Teacher or Room Data](#) section of the manual to add or remove teachers. Clicking on a class will bring up the list of students in that class.
- If you would like to view the data in class order, check the box on the far right-hand side "show only classes." See the [Moving a Class](#) section to move a class and see the [Modifying Enrollment Data](#) section to add or remove students from classes.

Missing Classes

If you have not made any manual changes to the classes and enrollment within the Admin UI, you can simply import updated class and enrollment files. A new import will not replace what was previously imported, but it will add in any new class and enrollment data.

If you have made manual changes in the Admin UI (i.e. changing teachers, moving kids from one class to another), then you will want to import a class file with ONLY the missing class(es) and an enrollment file with ONLY the missing enrollment.

These options will not disturb any appointments that have already been made.

Missing Enrollment

If you have not made any manual changes to the enrollment within the Admin UI, you can simply import an updated enrollment file.

Any subsequent imports of your class and enrollment files will not change previously imported class and enrollment data. It will simply ADD IN new data that is on the class or enrollment file.

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