Import or Add Data into Aries
June 1, 2015

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** - New or updated information

The **Import or Add Data to Aeries** form is utilized to import data or to mass add data into an Aeries table. There are **5** options available:

- **Current Database (SCH.MDE / DST.MDE)** allows you to pull data from a table that has already been imported into Aeries
- **External Database** allows you to import data from an external database
- **Mass Add Records** allows you to mass add information into records in a table
- **Excel File (.xls)** allows you to pull data from an .xls file and imported into Aeries
  Note: Access 2010 allows importing of .xlsx and .xls files. Prior versions of Access will only allow importing of .xls files.
- **Comma Separated File (.csv)** allows you to pull data from a .csv file and import into Aeries

Prior to using this function it is extremely important that a backup is created of the Aeries database. A printout should be generated of the **Target Table** and field descriptions prior to importing data. The option **Print a Database Table Information** is available at the bottom of the form that will generate a printout of the table selected.

After the data has been imported a message will display to allow you to look at any errors that may have been generated while importing data. To ensure that the data has been imported correctly it is crucial that all data is verified after the import has completed. If there are any errors they must be corrected prior to reloading the data and allowing the users to access this database.
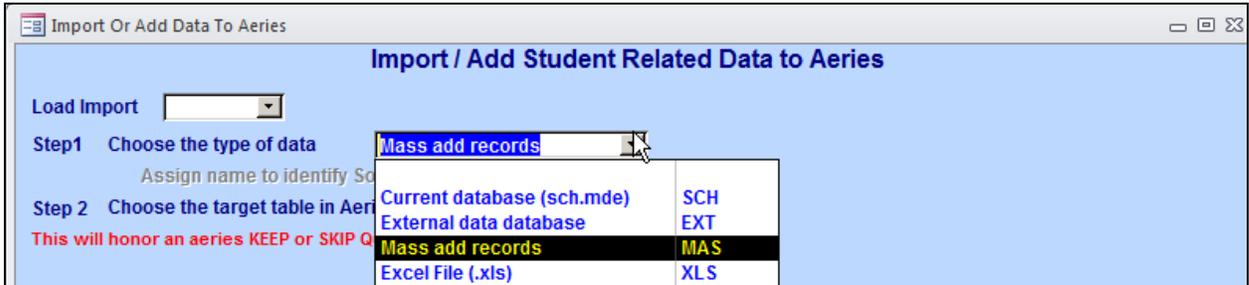
REMEMBER:
- **Create a backup of the Aeries database**
- **Printout a Database Table Information for the Target Table and compare fields to the table being loaded to ensure data is loaded correctly**
- **After the Target Table is loaded verify the error message log, correct any errors and reload the table if necessary**
- **Make sure the data is correct prior to allowing the users to access the database**

MASS ADD RECORDS

This form can be used to add a record into a table for every student. The query **Keep** or **Skip** can be used to select particular students, for example, only a particular grade.

STEP 1 - From the **Import or Add Data to Aeries** form **Step 1**, click the mouse on the drop down and select **Mass Add Records**.

STEP 2 - To select the target table where the data will be loaded click the mouse on the drop down for **Step 2**. All Aeries tables will display. Click the mouse on the **Target Table** selected, for example **Interventions** (**INV**).
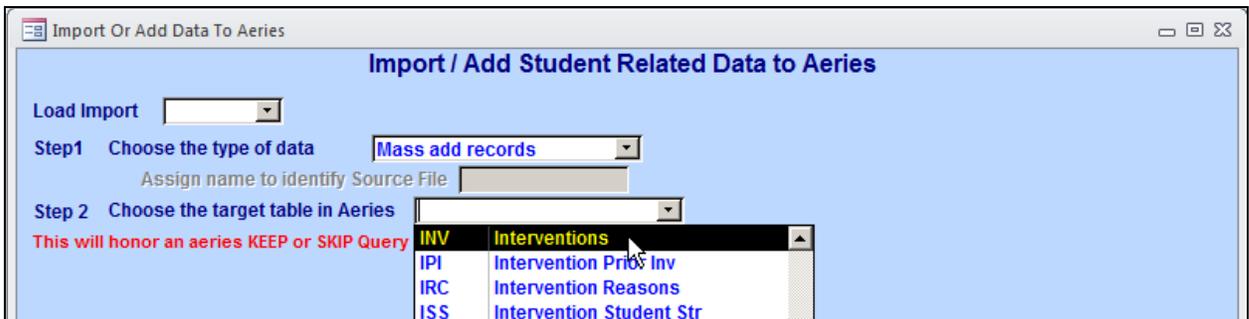
NOTE: Records CANNOT be mass added to the Student Data (STU) table with the this form. To import Students, use the Import Students form. Documentation is available at the end of this document.

SELECT IMPORT FIELD OR TYPE TEXT

If a query **Keep** or **Skip** has can be generated prior to accessing this form a message will display at the bottom of the form that **Records Are Being Skipped**. If the **Target Table** contains a **GR** field for grades the student's current grade can be pulled from the **STU** table and copied into the **GR** field.

To **Include Inactive** students click the mouse on the check box. Enter the information below the **Type Text** column for the fields selected. For example, the **DT** field is **DATE** and **05/29/2015** will be entered into this field for every record created.

Below the **DT** field is the **CD** field.   The **CD** field has an **HH** entered in the **Type Text** field and all records will have a code **HH** entered into this field. The field **CO** is comments. If the **Pull GR from STU** has been selected every record created will have grade (**GR)** pulled automatically from the **STU** table and entered into this field.

After all type text has been entered click the mouse on the **Mass Add Records** button. After the records have been processed a message will display indicating how many records have been processed and added. Click the mouse on the **OK** button. A message will display if there are no errors.

If there were errors an **Error Log** can be viewed. The following is an example of the **Error Log** with errors and indicates that there were records that could not be processed correctly. It is crucial that you review the data entered on the **Import or Add Data to Aeries** form.

For example, verify that you have entered the correct data to be loaded into the **Target Table** fields. Such as if an incorrect format was entered for a date to be loaded a data type conversion would occur and would create an error on the error log however the mass add could have still created records. The error below had the date **05/80/2015** entered.

tbl	msg	when
Silent	Rec# 1 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 2 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 3 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 4 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 5 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 6 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM
Silent	Rec# 7 Target Fld DT Input Fld @@ Data type conversion error.	5/29/2015 11:01:08 AM

NOTE: When this error log is closed out the message table is cleared. It is crucial that this error log be printed out prior to closing the Error Log.

The example used was for the Intervention (**INV**) table. The **Intervention** form is displayed below. Notice that a record has been added with the **Date** of **05/29/2015** and the **Code** field contains **HH** and **Comments** contains **CAHSEE Exam**. Also, the current grade has been copied from **STU** and is displayed in the **Grade** field.

Notice the other example above where the record displayed has NO date. A mass add was generated with the incorrect date format which gave the error message Data Type Conversion Error. ALL students had a record added to the INV table with NO DATE.

IMPORTING EXCEL OR CSV FILES

Excel (.xls or .xlsx) or Comma Delimited (CSV) files can be imported directly into Aeries.

STEP 1 - From the **Import or Add Data to Aeries** form **Step 1**, click the mouse on the drop down and select **Excel File (.xls)** or **Comma Delimited File (.csv).**

NOTE: The steps are generally the same for importing or adding data from Excel file or from the Comma Delimited file.

Enter a temporary table name in the field: **Assign name to identify Temporary Table**

STEP 2 - To select the target table where the data will be loaded, click the mouse on the drop down for **Step 2**. All Aeries tables will display. Click the mouse on the **Target Table** selected, for example **Physical Fitness Testing** (**PFT**).

Tables with a sequence number field (SQ) will display the following options:

- **AutoNumber SQ** will generate an SQ number for the record according to the last SQ number assigned,
- **Get SQ from file** will add the **SQ** number from the file being imported. If this option is selected the SQ field will need to be matched to the SQ field in the file imported.
- **Ignore SQ** will randomly generate an SQ number

Certain tables have complex primary keys and no sequence (SQ) field, like the CTS, PFT, and SBG tables. The following options will display.

- **Update existing & Add new records**
- **Delete and replace all records**
- **Add new records (leave existing records alone)**

On the right side of the form the fields will display for the table selected. If the table does not have a sequence number field (SQ) the field list on the right of the form will have some rows tagged with a red "K" indicating that those fields are part of the primary key.

The primary key "K" fields need to be matched to the file in order to properly import the data.

<u>SELECT THE SOURCE DATA</u>

STEP 3 - Next **Step 3** will allow you to browse to the excel or .csv file.

The next step is to select the **Table/Query Name**. Click the mouse on the **Table/Query Name** drop down. All available tables will display. Click the mouse on the **Table** selected. The **Load Input Fields** button will now be highlighted. Click the mouse on the **Load Input Fields** button and all fields from the table selected will be loaded.

SELECT THE MATCHING FIELD

STEP 4 - After the fields have been loaded, **Step 4** will now display the **Match On:** radio buttons for **Student Number**, **Permanent ID, CSIS ID** or **Old ID**. Click the mouse on the radio button for the field that will be used to match the records. Click the mouse on the drop down and select the field name.

SELECT IMPORT FIELDS

On the right hand side of the form all fields display from the **Target Table** and the name of the table displays at the top of the first column. To the right of the field displayed, click the mouse on the drop down arrow and all import fields will display for the temporary table. Click the mouse on the field to be loaded.

If the table does not have a sequence number field (SQ) the field list on the right of the form will have some rows tagged with a red "K" indicating that those fields are part of the primary key. The primary key "K" fields need to be matched to the file in order to properly import the data.

If data will be manually added to a field, enter the data under **Type Text** for the field selected. For example, the **DT** field is **Date Taken**. To add a standard test date for all students enter a date under **Type Text** and **ALL** records added will contain this date. Some tables contain a grade field and the option will display in the left hand corner to load the current grade into this field.

After all fields have been selected to be loaded into the **Target Table**, click the mouse on the **Import Records to Aeries** button. After the records have been processed a message will display with the number of records processed.

Click the mouse on the **OK** button. If there were no errors while processing the data a message will display indicating no errors occurred.

NOTE: Fields marked with "K" MUST be provided in order to properly import, add or update the table.

If there were errors a message will display to **View the Error Log**. Click the mouse on the **Yes** button and the **Error Log** will display with all errors. This indicates that there were records that could not be processed correctly according to the Load selections.

The record number on the left of the message is for the record in the File being loaded. It is crucial that the file be reviewed and any errors corrected. **When this error log is closed the message table is cleared. It is crucial that this error log be printed out prior to closing the Error Log.**


IMPORTING DATA FROM THE CURRENT DATABASE

Prior to **Importing Data from the Current Database** you must first create a temporary table and import the data, such as from **Excel** into the table within Aeries. Prior to importing the data it is also crucial that you verify the data being loaded.

From **Aeries** open and maximized the **SCH** database window in lower left-hand corner of the screen. Click on **File**, **Get External Data** and **Import**.
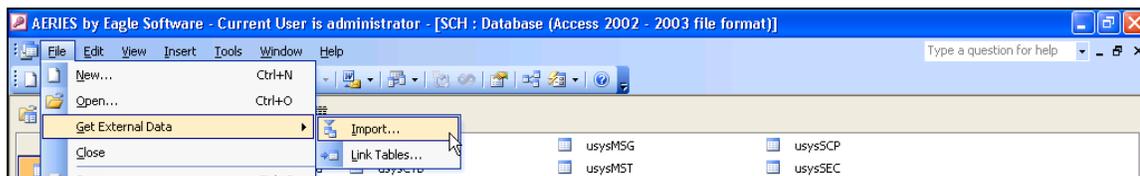
Change the **Files of Type** to **Excel** files. Select the drive where the data is stored in the **Look In**. Double-click the file listed to start Importing.
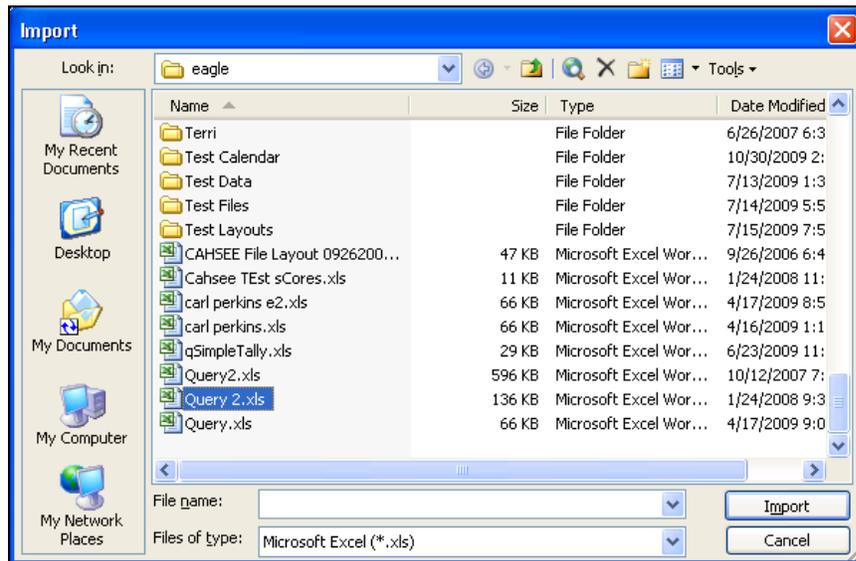
The **Import Spreadsheet Wizard** will display. If the first row of data in your file contains headings click **First Row Contains Column Headings** so column headings don't get included in the data import. Click **Next**.
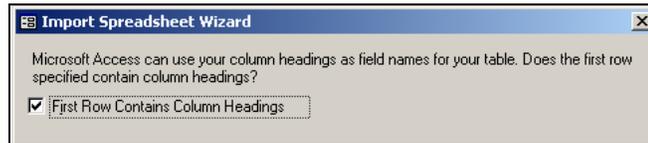
Click **Next** to store the data in a **New Table** and field options will display. Click **Next** and select a primary key, either the **Student ID** or **Student Number** field.

Click **Next** and the final box allows you to Name the new table, such as **TST002**. After naming the table, click **Finish**. A message will display when the process has completed.

The data is now stored in the Aeries database in the **CAHSEE Test Scores** table. To display this data, **double-click** on the table. Verify the data and when through viewing the data close the table. Minimize the **SCH** database window. Now in Step 1 select whether you will be importing data from the **Current Database** or importing **External Data**.

IMPORT TABLE FROM CURRENT DATABASE OR EXTERNAL DATABASE

After data has been imported into a temporary table in the **Current Database** the data can then be updated into an Aeries table.

STEP 1 - From the **Import or Add Data to Aeries** form **Step 1**, click the mouse on the drop down and select **Current Database (sch.mde)**. The current database definitions and any imported tables will be loaded from C:\eagle\sch.mde.

Data from an **External Database** can be imported and updated into a Target Table within Aeries.

STEP 1 - From the **Import or Add Data to Aeries** form **Step 1**, click the mouse on the drop down and select **External data database**.

NOTE: **The steps are generally the same for importing or adding data from the Current Database (sch.mde) or from an External Database. The difference is that a path must be selected when data is being imported from an External Database.**

STEP 2 - To select the target table that the data will be imported into click the mouse on the drop down for **Step 2**. All Aeries tables will display. Click the mouse on the **Target Table** selected.

On the right side of the form the fields will display for the table selected. If the table selected is not sequenced and does not have an **SQ** field then the table only contains one record per student. This indicates that records can only be updated, replaced or a record can be added if one does not exist.

If the table has an **SQ** field the following options will display to assign a sequence number. **Auto Number SQ** will generate an SQ number for the record according to the last SQ number assigned, **Get SQ from File** will add the **SQ** number from the file being imported or **Ignore the SQ** will randomly generate an SQ number.

SELECT THE SOURCE DATA

STEP 3 - Next **Step 3** will allow you to either select previously imported data or select data from an external database. If external data was selected the **Path & Database** will be available to select the path and database. If the current database was selected the **Path & Database** field fill not be accessible.

The next step is to select the **Table/Query Name**. Click the mouse on the **Table/Query Name** drop down. All available tables will display. Click the mouse on the **Table** selected. The **Load Input Fields** button will now be highlighted. Click the mouse on the button and all fields from the table selected will be loaded.

SELECT THE MATCHING FIELD

STEP 4 - After the fields have been loaded, **Step 4** will now display the **Match On:** radio buttons for **Student Number**, **Permanent ID, CSIS ID** or **Old ID**. Click the mouse on the radio button for the field that will be used to match the records. Click the mouse on the drop down and select the field name.
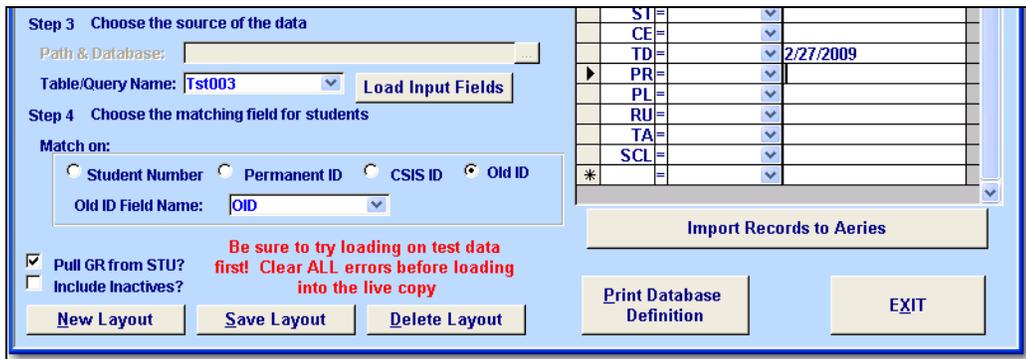

SELECT IMPORT FIELDS

On the right hand side of the form all fields display from the **Target Table** and the name of the table displays at the top of the first column. To the right of the field displayed, click the mouse on the drop down arrow and all import fields will display for the temporary table. Click the mouse on the field to be loaded.

Import or Add Data **Page 12**

For example, data will be loaded from the **TST002** table into **TST**. The table name **TST** displays at the top of the first column and the field names for this table display directly below. The **TEST ID** field from the **TST002** table will be selected from the drop down and loaded into the **ID** field in the **TST** table.
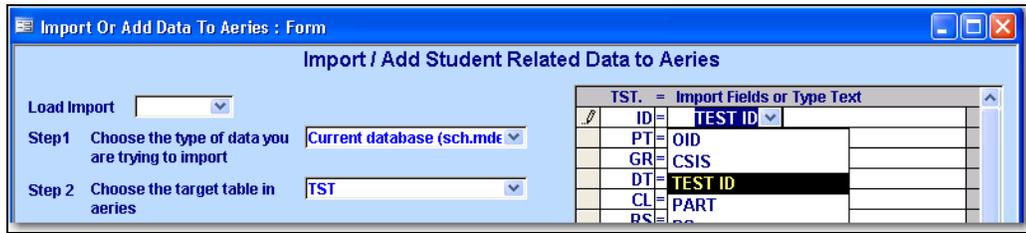
If data will be manually added to a field, enter the data under **Type Text** for the field selected. For example, the **TD** field is **Date Test Taken**. To add a standard test date for all students enter a date under **Type Text** and **ALL** records added will contain this date. Some tables contain a grade field and the option will display in the left hand corner to load the current grade into this field.

After all fields have been selected to be loaded into the **Target Table**, click the mouse on the **Import Records to Aeries** button. After the records have been processed a message will display with the number of records processed.

Click the mouse on the **OK** button. If there were no errors while processing the data a message will display indicating no errors occurred.

If there were errors a message will display to **View the Error Log**. Click the mouse on the **Yes** button and the **Error Log** will display with all errors. This indicates that there were records that could not be processed correctly according to the Load selections.

The record number on the left of the message is for the record in the File being loaded. It is crucial that the file be reviewed and any errors corrected. **When this error log is closed the message table is cleared. It is crucial that this error log be printed out prior to closing the Error Log.**

	tbl	msg	when
▶	Silent	Rec# 119 Error: Update or CancelUpdate without AddNew or Edit.	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld FS Input Fld FS Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld AF Input Fld AF Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld FC Input Fld FC Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld NO Input Fld NO Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld YR Input Fld YR Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld MO Input Fld MO Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld WK Input Fld WK Update or CancelUpdate without AddNe	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld NM Input Fld NM Update or CancelUpdate without AddNev	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld SS Input Fld SS Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld CD Input Fld CD Update or CancelUpdate without AddNew	12/16/2004 14:15:19
	Silent	Rec# 119 Target Fld UC Input Fld UC Update or CancelUpdate without AddNew	12/16/2004 14:15:19

It is also crucial that you review the **Import or Add Data to Aeries** form. For example, verify that you have selected the correct **Import Fields** to be loaded into the **Target Table** fields. For example, if a text field was selected to be loaded into a numeric field, the incorrect data type was selected and would create an error on the error log.

SAVING FILE LAYOUTS

Any Import or Add Data layout can be created and saved from the **Import or Add Data** form. The **New Layout** button will allow you to start over to create a new layout. The **Save Layout** button will allow you to save the current layout created and the **Delete Layout** button will allow you to delete an old layout.

To save a layout, go through **Step 1** through **Step 4** and set up the layout. After all steps have been performed click the mouse on the **Save Layout** button.

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

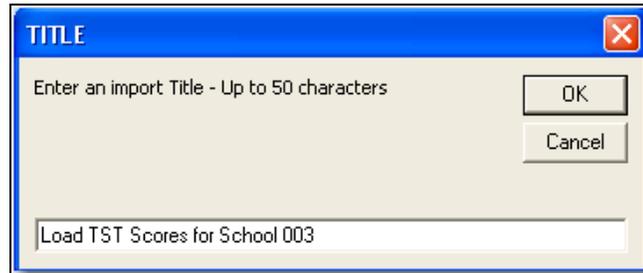If the **Import ID Code** selected already exists the following message will display. To overwrite the code, click the mouse on the **Yes** button. To cancel and rename the ID click the mouse on the **No** button.
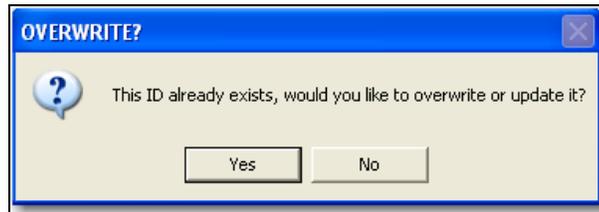
The following entry box will display. Enter a descriptive **Title** and click the mouse on the **OK** button.

After a layout has been saved it can be selected by clicking the mouse on the **Load Import** drop down.

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

The form will display the layout saved with the description displayed to the right of the field. To import the records click the mouse on the **Import Records to Aeries** button.

IMPORT STUDENTS FORM

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

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

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

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

The **XLS** and **CSV** files:

- User must provide a name to identify the temporary table created in Aeries. If the table already exists, it will warn the user, but has the option to overwrite the table..
- These files must have a header in order to be imported correctly.
- These files are imported and the user has the ability to modify them if necessary.
- Users who are running Office 2007 **CANNOT** use .**xlsx** files as source files. They must be opened and saved in the .**xls** format.

After the import information has been entered in **Step 1 - Step 2** and the **Load Input Fields** button has been generated the data is loaded into the temporary table. This data can be viewed by clicking the mouse on the **View Temp Table** button. The data can be displayed and updated from the temporary table prior to importing the data into the **STU** table.

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

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

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

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

Due to the field width in the following fields **TL**, **FW**, **FX**, **MW**, **MX**, **SS**, **MPH** the program will verify that they do not contain dashes, parenthesis or spaces. If any are located they will remove them from the field and will prior to importing the file. A blank record will also be added to the **SUP** and **SSD** tables for all students added to the **STU** table.

While creating the temporary table errors could occur. A table called **Student Import Errors** will be created that will provide details of all conversion issues.

Once the data has been imported into the **STU** table the option is available to view a datasheet that can be printed out that will contain the Student#, ID, Name, Grade, and Birth date of all students added. This form also has the options to create a New Layout, Save Layout, or Delete Layout .

IMPORT AN EXCEL OR COMMA DELIMITED FILE

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

STEP 1 – Click the mouse on the drop down and select either the **Excel File (.xls)** or the **Comma Delimited file (.csv)** to be loaded.

Enter a **Temporary Table** name that will be automatically created to load the file into, for example, **ImpSTU**.

STEP 2 - To select the external data click the mouse on the browse button for the **Path & CSV filename**. Click the mouse on the **Table/Query Name** drop down to locate and select the target table entered in **Step 1**. Click the mouse on the **Load Input Fields**. A message will display when complete.

NOTE: It is highly suggested that you create a backup of your database prior to importing ANY students into the STU table.

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

The option is also available to **Specify Starting ID Number**. A specific number can be entered into the field and when the records are created the process will begin with the number entered and increment for each student added. There is also an option that will **Calculate the Next Grade** field by using the **GR** field located in the file and increase the grade by 1.

On the right hand side of the form select the fields that will be loaded into **STU** from the Temporary Table. Click the mouse on the drop down and the field names in the temporary table will display. After all fields to be loaded into **STU** have been selected click the mouse on the **Import Students** button.

> REMEMBER: There are required fields that must be imported from the file into the STU table. The required fields to be populated are the LN, FN, BD, and GR. If any required field is
>
> missing data the student will not be loaded.

If there are errors located within the file the following message will display that will allow you to display the error log by clicking the mouse on the **Yes** button.

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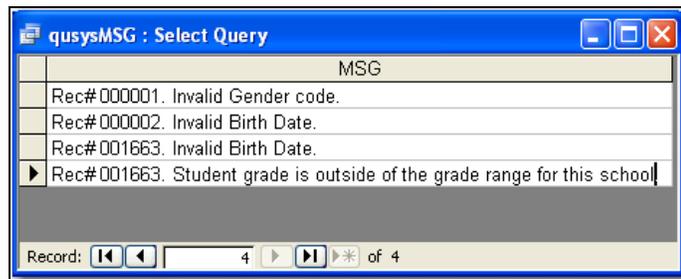

The **View Temp Table** button will display the temporary table. The record number containing the error can be located. For example, the datasheet above indicates that record 2 has an invalid birthdate. There is no birthdate loaded for this student. The data can be corrected from the datasheet displayed.
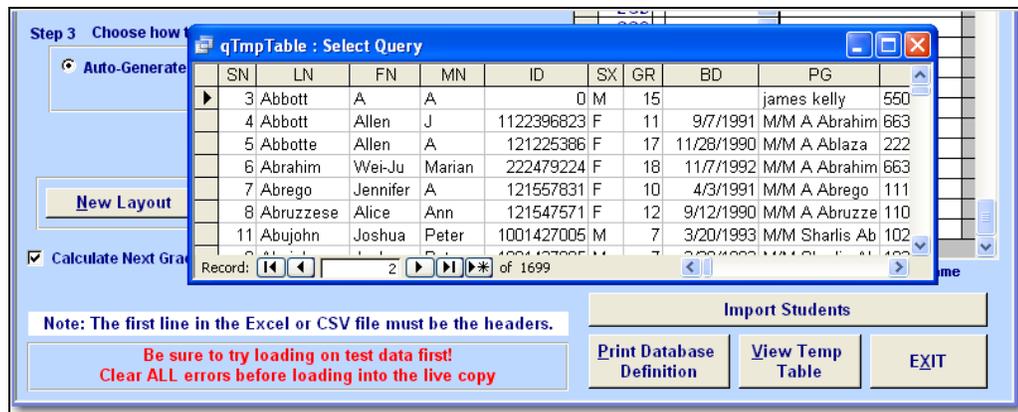

After the data is corrected the **Import Students** button can be selected to continue with the Import Student process. If there is data that cannot be corrected you can still continue on with the Import Student process.

When the following message displays click the mouse on the **No** button.
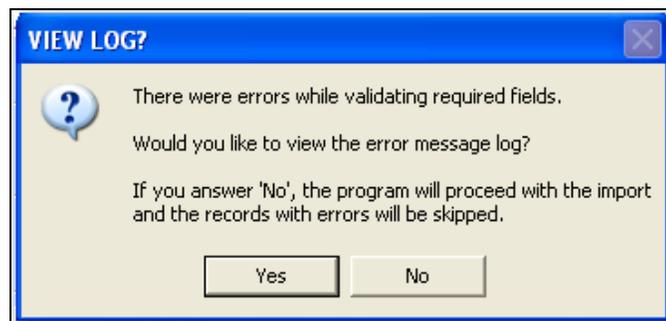
The records will be added to the **STU**, **SUP** and **SSD** tables. When complete the following message will display with the total number of records added. To display a datasheet containing **ALL** students added to the **STU** table click the mouse on the **Yes** button.
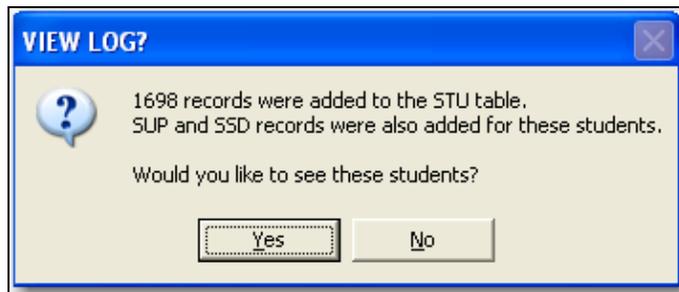
A datasheet will display with the following student information that will allow you to print out this listing to identify the new students added to the **STU** table.