How to import absence data to ebs4 client

Introduction

ebs4 Client provides the ability to import absence information for a school that manages their attendance information in a third party application.

In order to meet management and statutory reporting requirements, schools should periodically run an absence import to synchronise absence information between ebs4 and the school's third party application. In addition to importing the absence information, the import will also update whether a student is present which is indicated by the lack of absence records. The import will only apply to all active students in the school.

When initialising the import process, you will need to define the applicable date range for the import.

The import file must be in a Dbase III file format, indicated with a .dbf or .d file extension in order to be valid.

The incoming absence information from the third party application will be regarded as the master source of attendance information.

Where discrepancies arise between the data in the third party application and data held in ebs4, the imported data will take precedence.

The absence information imported will comprise of both whole day and partial day absences. Period by period absences will not be imported.

⚠️ **Warning:** Using the attendance import will overwrite all attendance data in ebs4. Ensure you select the correct range of days to be imported.

Navigation

To set up absence import parameters:

ebs4 Client > Options > Administration > Absence Import
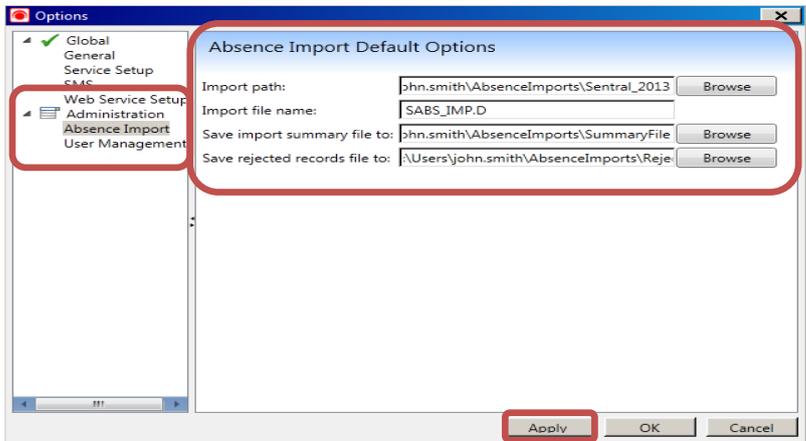
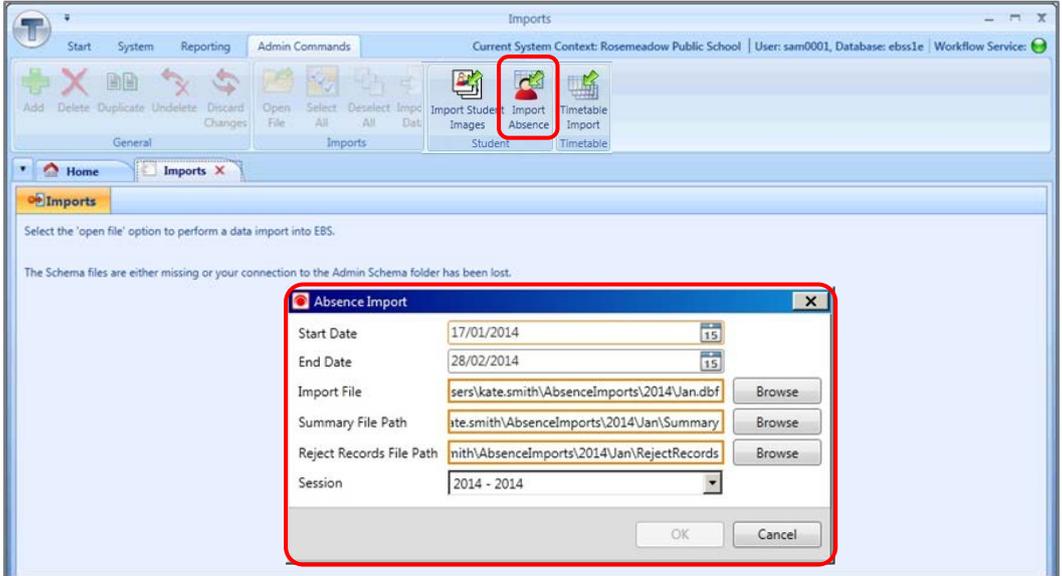To import of absence data:

ebs4 Client > Imports

Prerequisites

Before undertaking an ebs4 absence import you should ensure:

- Institution settings for the current year have been set. Refer to *User Guide for System Administration*.
- School roll call time has been set. Refer to *SM01a QRG10: How to set up official roll call start and end times*.
- A single roll class event with all students enrolled in the school exists and is timetabled for every school day at the roll call time specified in the institution settings. Refer to *SM07 WI Setup Primary School Curriculum* or *SM07 WI Setup High School Curriculum*, *SM07 WI Enrol Primary School Cohort* or *SM07 WI Enrol High School Cohort* and *SM09 QRG How to Schedule a Roll Call Class*.
- A designated folder location has been identified for:
  - o Absence import files to be imported to
  - o Summary files to be saved to
  - o Reject Records files to be saved to.

1. Set up Absence Import Parameters

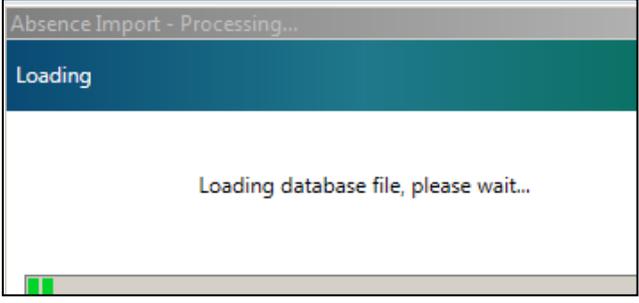| Instructions		
Step	**Description**	**Screenshot / Table**
1.1	Log into ebs4 Client Select the **T-bar** icon > **Options** > **Administration** > **Absence Import**. Navigate to the Absence Import Default Options screen Enter the Default Options and click **Apply**.	
1.2		Below is a description of the field requirements: <table><tr><th>Field</th><th>Description</th></tr><tr><td>Import Path</td><td>Enter or lookup, via the Browse button, the default directory where the import file will be kept. Note: You will initially be in a Citrix environment and will need to navigate to the local or network drive.</td></tr><tr><td>Import File Name</td><td>Enter the default import file name. Note: The file and file name should have the file extension '.dbf' .or '.d'</td></tr><tr><td>Save import summary file to</td><td>Enter or lookup, via the Browse button, the default directory where the summary file produced at the end of the import process will be stored.</td></tr><tr><td>Save rejected records file to</td><td>Enter or lookup, via the Browse button, the default directory where the rejected records file produced at the end of the import process will be stored.</td></tr></table> ⚠️ **Note:** Options defined on this page will be used as defaults when the absence import is initialised. You will still be able to change those defaults, where required.

2. Import Absence Data

2.1	To navigate to the Absence Import functionality: Click on the **Import** icon from the **System** ribbon within ebs4 Client.	
2.2	Click on **Import Absence**. This will open the **Absence Import** page.	

2.3	Define the **Absence Import parameters** Complete the mandatory fields outlined in the table. Once all mandatory fields have been entered and are valid, the **OK** button will be enabled.	Complete the following mandatory fields as required:

Field	Description
Session	Specify the session that this import is applicable for. This will default to the default register session as defined in institution settings (located in Registers) for your school. The start and end date defined will be validated to ensure that they fall within the start and end date of the selected session.
Start Date	Specify the **Start Date** for this import. **Note:** This date should be after or the same as the earliest date in the import file.
End Date	Specify the **End Date** for this import. **Note:** This date should be before or the same as the latest date in the import file.
Import File	Specify the import file, and the path, for the import. Alternatively, use the **Browse** button to browse to the import file. **Note:** This will default to the file name and path as defined in T > Option, but can be amended.

		Summary File Path	Specify the location where the summary file will be saved. Alternatively, use the Browse button to locate where the file has been saved. **Note:** This will default to the path as defined in T > Option, but can be amended.
		Reject Records File Path	Specify where the rejected records file will be saved. Alternatively, use the Browse button to locate the required file. **Note:** This will default to the path as defined in T > Option, but can be amended.

Note: If default options have been set up the **Import File**, **Summary File Path** and **Reject Records File Path** fields will default to the pre-set values. Any default values can be edited on this page if required.

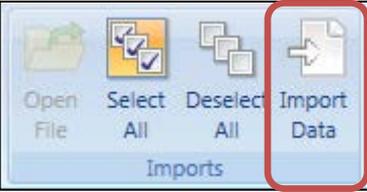|		
2.4	Click on the **OK** button to continue. ebs4 will proceed to load and validate the import file.	**Note:** The length of time this will take will depend on the size of the file. A progress bar will display to provide a visual indication of the progress.
2.5	At the end of the import, the **Import Absence** will display any errors or warnings found in the import file. **Note:** Any rows without errors and/or warnings will be selected by default for import, and cannot be unselected. Use the 'Select All' button located in the ebs4 ribbon if required.	a. A summary of the selected import file, the import date range and the total number of records in the import file. b. A summary of the total records and selected records. c. A condition builder dropdown allows you to filter the list using one or more of the columns. You can also filter based on selected and unselected rows, using the '(select)' filter. Cells that are coloured red indicate that there is an error. Hovering over the red cell will display the relevant error message. Rows with red cells will not be imported. Cells that are coloured yellow indicate there is a warning. Hovering over the yellow cell will display the relevant warning message. Rows with any yellow cells will be imported.

2.6	To import the selected records, click on the **Import Data** icon on the ribbon at the top of the screen.	
		Note: Clicking on the **Select All** icon will select all rows that can be selected. Similarly, clicking on the **Deselect All** icon will deselect all rows that can be deselected.

2.7	Once processing is completed, a summary will be displayed. Click the **Close** button **Note:** Upon import, a Summary File and Reject Records file will be saved to the nominated directory.	

Absence Import

Student absence data imported

Import filename:	C:\Users\kate.smith\AbsenceImports\2014\Jan.DBF
Execution time:	00:08 min
Rows processed:	456
Rows rejected:	544
Summary file:	C:\\Users\kate.smith\AbsenceImports\2014\Jan\Summary\ImportAbsence20142802_0305.txt
Rejections file:	C:\\Users\ksate.smith\AbsenceImports\2014\Jan\RecordRejects\ImportAbsence20142802_0305.txt
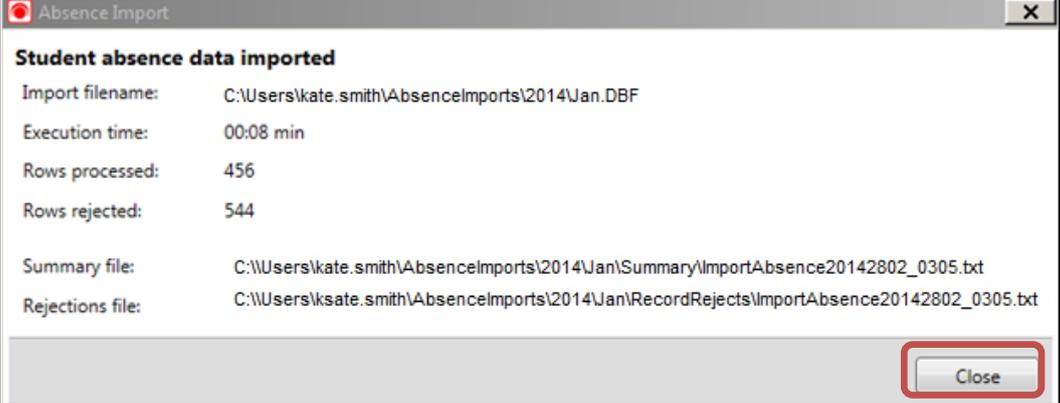
Output File	Description
Summary	The **Summary** file contains the data that is displayed once an import is complete. It is automatically stored in the location that has been specified in the **Summary File Path** field. The summary file will be named 'ImportAbsence_YYYYMMDD_HHMM.
Reject Records	The **Reject Records** file contains the information of all records that have been rejected on import. It is automatically stored in the location that has been specified in the **Reject Records Path** field. The rejected records file will be named 'Rejections_YYYYMMDD_HHMM'. This file can be imported as a 'Tab' and 'Comma' delimited file to Microsoft Excel.

2.8	Correct any errors in the source system. Any errors identified in the Reject Records file will need to be corrected in the 3rd party application and the import will need to be re-run.	**Note:** The absence import process will need to be repeated until the import returns no errors.

What is updated in ebs4?

The absence import process will use the start and end dates you specified at the beginning of the import, and each date within that range will be processed for all students in the school.

Only attendance for students with active enrolments (for a scholastic year, where UI_LEVEL = 'YEAR') on the attendance transaction date will be processed.

An enrolment is deemed active when it's Progress_Type = 'A'.

- **Whole day Absence/Presence**

Whole day absence records included in the import file will be updated for the relevant student using the default absence usage code. Only the roll call slot will be updated. The absence import will check that only one roll call slot exists for the student for the date. If there is more than one slot flagged as roll call for a date, this whole day absence will be rejected and included in the rejected records file.

Where there isn't a whole day absence record for students with active enrolments for each day within the specified date range, the default roll call slot will be updated to the default present usage code.

- **Partial Absence**

The assumption is that a complete list of partial absences for the student will be included in the import file, for that date. Therefore, when partial absences are detected for a student for a particular date in the import file, any existing partial absence record in ebs4 will be deleted before the import data is created.

Partial absence records will be created in the Absence table using the usage code supplied in the import file. Each absence record will be created with a Type; L, E or O (Late, Early, Out of Class) as per the following rules.

1. TYPE = L, where STARTTIME = Official School Start Time*

2. TYPE = E, where ENDTIME = Official School End Time*

3. TYPE = O, where STARTTIME <> Official School Start Time

Note: Official School Start/End Time values are obtained from institution settings (located in Registers) - Official School Start Time and Official School End Time.