fedena®

CUSTOM IMPORT

ADMINISTRATOR & EMPLOYEE USER GUIDE

PLUGIN

ABOUT THIS GUIDE

Purpose

Fedena is a multi-purpose, web-based information management system that enables educational institutions to manage students, teachers, employees, and all the systems and processes related to running your institution efficiently.

The **Fedena User Guide for Custom Import** provides step-by-step guidance to help the Fedena Administrator and the Fedena Employees quickly import employee, student, or intuitional data into Fedena using the Custom Import plugin.

Intended Audience

This guide is intended for the Fedena Administrator and the Fedena Employees.

Note: From this point forward, the term Fedena Administrator will be referred to simply as 'Administrator', and the term Fedena Employee will be referred to simply as 'Employee'.

Referenced Sections and Topics

This guide may include references to sections and topics that may not be contained within the guide. See the indicated user guide for the referenced section or topic.

Prerequisites

To use this guide, you will need the following:

- Access to a Fedena instance that is installed on a server or your local network.
- A Fedena institution account created with its settings configured.
- A recommended web browser – Every latest version of Google Chrome and Mozilla Firefox, Internet Explorer 9 and above.
- Administrator access to the Fedena institution account, or Employee access to the Fedena institution account with necessary privileges.

Modules Covered in this Guide

This guide covers the following Fedena modules.

Module	Coverage
User	Explains the privileges required to access the Custom Import plugin.
Custom Import	Explains how to import employee, student, or intuitional data into Fedena.

Guide Conventions

The following typographical conventions are used in this guide.

Formatting Convention	Description
Bold type	Screen element names such as Fields, Buttons, and so on, and to give emphasis to a word.
Navigation (>)	A menu path.
Note:	A preface to Note information. Notes contain helpful information that is highlighted to draw your attention to it.
Hyperlink	Provides quick and easy access to cross-referenced topics. Hyperlinks are highlighted in blue and underlined.
External URLs	Links to external URLs are displayed in Dark Red.

Guide Updates

This user guide is updated with every major release of Fedena.

CONTENTS

GETTING STARTED

This section gives you a brief overview about Fedena plugins, and also describes the user roles and privileges required to access the **Custom Import** plugin.

About Fedena Plugins

Fedena plugins are tools used to extend the functionality of Fedena. Also referred to as Add-on modules, plugins can be added to your Fedena institution to suit your requirements. If you see a Fedena plugin you think will help your institution, contact your Fedena Account Administrator or Fedena Support.

User roles and Privileges

The administrator has complete privileges over the Custom Import plugin. Privileged employees must be provided the following privileges to be able to access and use the Custom Import plugin.

Privilege	Module	User Control
Administration / Operations		
Custom import privilege	Custom Imports	Can control the Custom Import plugin.

Log in to Fedena

Before you can log in to Fedena, you will need your Fedena institution URL and your username and password.
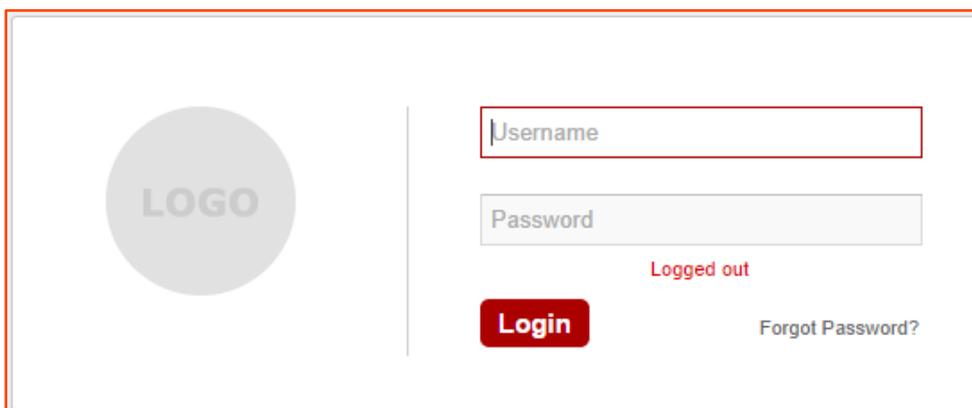
Enter the **Username** and **Password**, and then click the **Login** button.

CUSTOM IMPORT

The **Custom Import** plugin helps institutions import employee, student, and intuitional data into Fedena using a comma-separated value (CSV) formatted file. The Custom Import plugin will help save time by alleviating manual data entry tasks, and will also reduce the chances of error allowing institutions to work with greater accuracy. When a custom import is performed—if Fedena's SMS settings is configured—an SMS notification is sent to the corresponding user whose information is being imported into Fedena.

Who can perform a custom import

The administrator or a privileged employee (**Custom import privilege** must be provided) can perform a custom import.

How to access Custom Import

At the top of your dashboard, click the module access icon [image] > **Data and Reports** > **Custom Imports**

Data you can import

Custom Import can be performed when the following information needs to be recorded in Fedena:

- Employee admission details including salary structure, any additional details, bank details, and employee privileges
- Student admission details including any additional details

  Note: Currently, student roll numbers cannot be imported using **Custom Import**.

- Student guardian details
- Student attendance details (only Daily attendance type)
- Student exam scores
- Library book details including any additional details and book tags
- Store item details
- Item supplier details
- Store details

Prepare to import data

The Custom Import process includes the following general steps:

1. Identify the data in your existing system that must be imported.

2. Become familiar with how data is structured in Fedena.

3. Create necessary associated data in Fedena. For example, if you are importing a new student's data, make sure the associated data, such as batches, departments, student categories, and so on, must be created in Fedena prior to the import process.

4. Export the CSV file structure from Fedena.

5. Create your custom import file based on the CSV file structure. Make sure to clean up and format your existing system data based on the CSV file structure. For more information, see Formatting the CSV file.

6. Perform a trial import with minimal amount of data. You are likely to encounter errors the first time that you perform an import. Review and fix the errors, and then perform the import again.

7. After you make sure your data has been imported correctly, proceed to import all data into Fedena.

Custom import checklist

Before performing a custom import, please go through the following checklist.

Permission

Make sure you have the privilege (**Custom import privilege** must be provided) to perform a custom import. If you do not have the privilege, the Custom Import plugin will not be available.

File Format

The custom import file must be in a CSV (comma-separated values) file format. We recommend editing the CSV file using LibreOffice Calc, which can downloaded for free from here. When opening the file to edit, make sure that the delimiter is **Comma** and Character set is **Unicode (UTF-8)**.
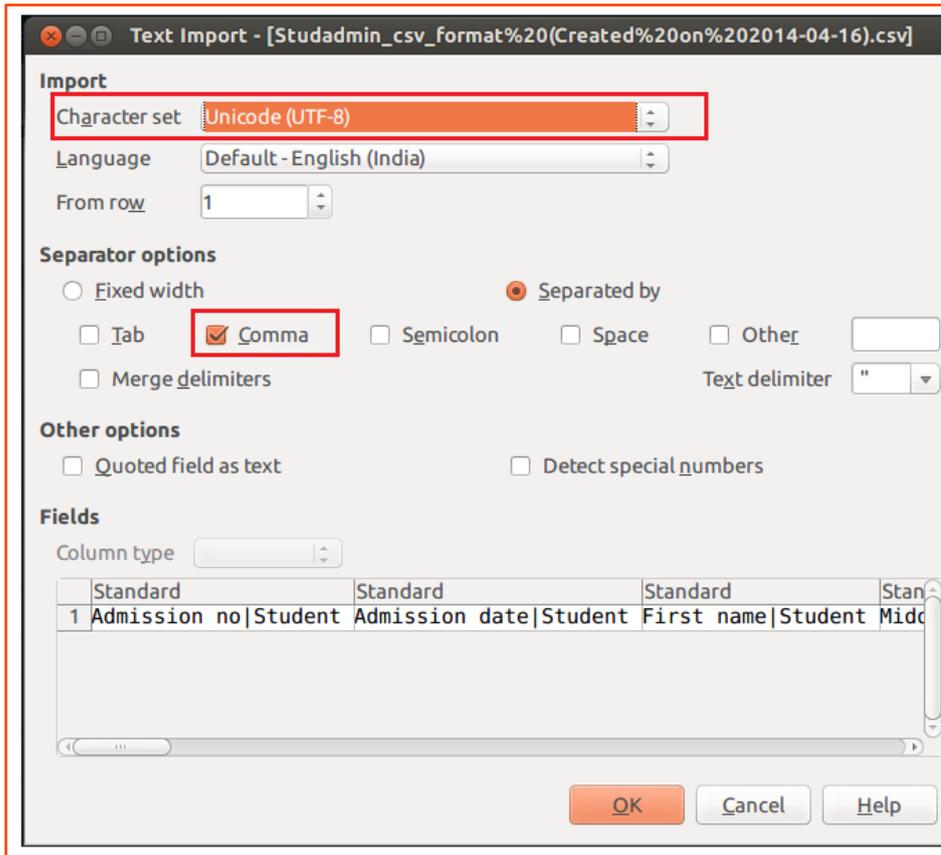
Column Headers

The column headers in the custom import file contain the field names that help identify and map the new data to the fields in Fedena.

Note: Do not add, edit, or delete column headers.

This is what the column headers will look like.

Invalid Characters

Majority of fields in Fedena will accept different characters, however, certain characters can cause issues with the CSV file and prevent data from being imported into Fedena. For example, the **Mobile phone** column or the **Amount** column will only accept numerical values. Another example, a date field such as the **Admission Date**, the date must be entered in the correct format: mm/dd/yyyy (02/22/1990) or dd-mm-yyyy (22-02-1990).

Mandatory Fields

Mandatory fields must contain a value. Make sure not to leave any mandatory fields blank in the custom import file. For example, if you are importing new student data, all student records must have an **Admission number**. Also, custom additional mandatory fields must be filled.

Note: Mandatory fields will contain an asterisk (*) symbol in the Fedena interface.

Checkbox Fields

Make sure that the data you are importing from checkbox fields contain values that will properly convert during the import process.

- If you want a checkbox enabled – Enter any text
- If you do not want a checkbox enabled – Enter '**NULL**'

Drop-down Fields

Data entered in a drop-down field must exist in the corresponding field in Fedena. For example, if you want to import student category information, before you import the student records, make sure all student categories are already created in Fedena. The value entered in the custom import file must match the existing value in Fedena.

Blank Rows

Delete all blank rows from the file to be imported.

Entering Exam Scores

When you are custom importing exam scores, if marks are not entered for a student, then the student will be marked absent. If an exam is not applicable to a student, the student must be omitted from the corresponding CSV file.

Time Estimate

Currently you are allowed to import only 200 records (200 rows) at a time. A custom import will take a maximum of 2 minutes depending on the type of data being imported.

Formatting the CSV file

For a successful custom import, the data in your custom import file must be formatted correctly and must match data in Fedena when necessary.

The following tables lists all mandatory fields for each data type.

Employee admission details	
Mandatory Fields	**Data Format Description**
Employee Category Name|Employee	–
Employee number|Employee	–
Joining date|Employee	mm/dd/yyyy (02/22/1990) or dd-mm-yyyy (22-02-1990)
First name|Employee	–
Gender|Employee	Enter 'm' for male and 'f' for female. If you do not enter a value, the Gender field for the employee record will be considered as Male.
Employee Position Name|Employee	–
Employee Department Name|Employee	–
Date of birth|Employee	mm/dd/yyyy (02/22/1990) or dd-mm-yyyy (22-02-1990)
Nationality Name|Employee	Enter the name of the country. For example, an employee from India will have Nationality as India, not Indian.
Email|Employee	–
Student admission details	
Admission no|Student	–
Admission date|Student	mm/dd/yyyy (02/22/1990) or dd-mm-yyyy (22-02-1990)
First name|Student	–
Batch Name|Student	Course code + Batch name. For example, the course Zoology has the course code 'Zoo'. The course contains a batch by the name '2014A'. In the Batch Name|Student field, you will enter 'Zoo - 2014A'.

Date of birth|Student	mm/dd/yyyy (02/22/1990) or dd-mm-yyyy (22-02-1990)
Gender|Student	Enter 'm' for male and 'f' for female. If you do not enter a value, the Gender field for the student record will be considered as Male.
Nationality Name|Student	Enter the name of the country. For example, a student from India will have Nationality as India, not Indian.
Email|Student	This field is mandatory only if Moodle enabled.
Student guardian details	
Ward Admission Number|Guardian	–
First name|Guardian	–
Relation|Guardian	–
Student attendance details	
Student Admission Number|Attendance	–
Forenoon|Attendance and Afternoon|Attendance	Both fields, or either one of the fields must be filled if a student was absent.
Month date|Attendance	–
Batch Name|Attendance	–
Student exam scores	
Exam group name|inject	–
Batch name|inject	–
Subject code|inject	–
Student Admission Number|Exam score	–
Marks|Exam score	–
Library book details	
Title|Book	–
Author|Book	–
Book number|Book	–
Store item details	

Item name|Store item	–
Quantity|Store item	–
Unit price|Store item	–
Tax|Store item	–
Batch number|Store item	–
Store Code|Store item	–
Code|Store item	–
Item Category Code|Store item	This field is mandatory only if you fill the Sellable|Store item field.
Item supplier details	
Name|Supplier	–
Contact no|Supplier	–
Supplier Type Code|Supplier	–
Store details	
Name|Store	–
Code|Store	–
Store Category Code|Store	–
Store Type Code|Store	–

Perform a custom import

1. At the top of your dashboard, click the module access icon > **Data and Reports** > **Custom Imports** to open the **All Exports** page.

2. In the top right, click the **New** button.

3. In the **Name** field, enter the name of the custom import.

4. In the **Model** field, select the type of data you want to import.
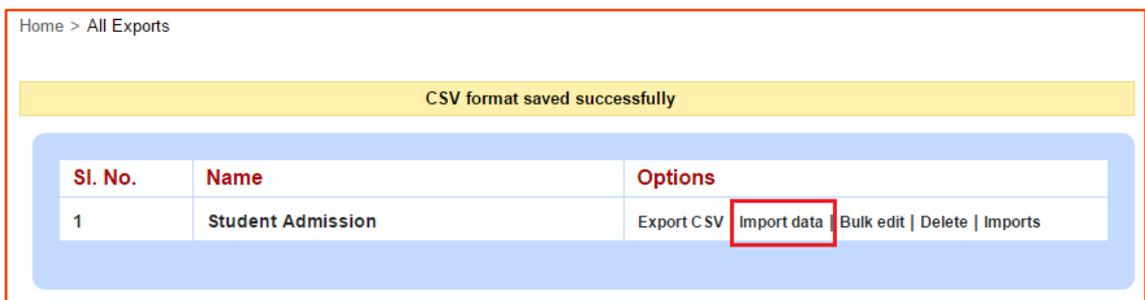
5. Select the associated data you also to want record in the custom import file.

6. Click the **Save** button.

7. Click **Export CSV** to download the CSV file to your local drive.
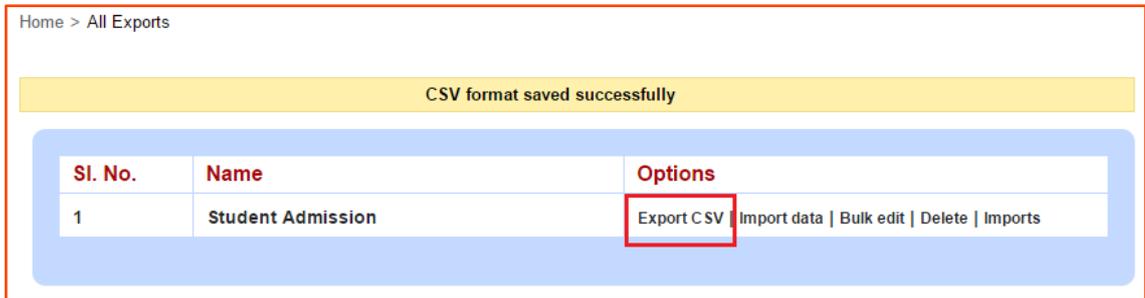
8. Open the CSV file, enter all required data, and then save the file.

9. Go to the **All Exports** page, and click **Import data**.

10. Select the CSV file to be uploaded, and then click the **Upload** button. Once the import process begins, you cannot cancel it.

11. To view the status of the import process, click on **Click Here**.
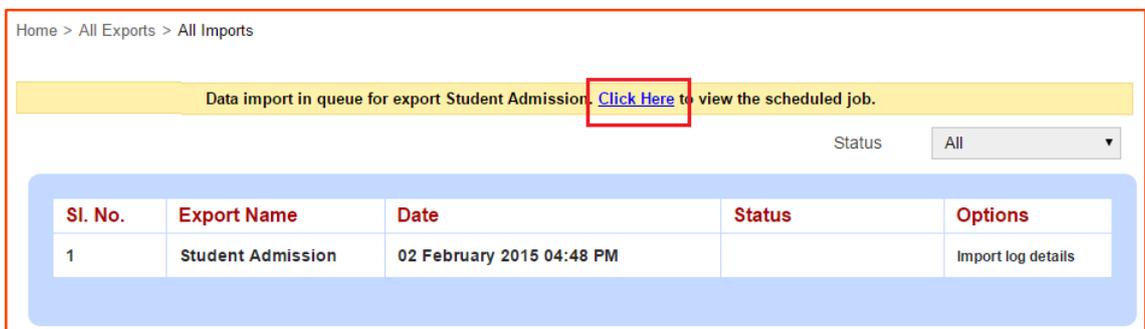
The following screen is displayed.
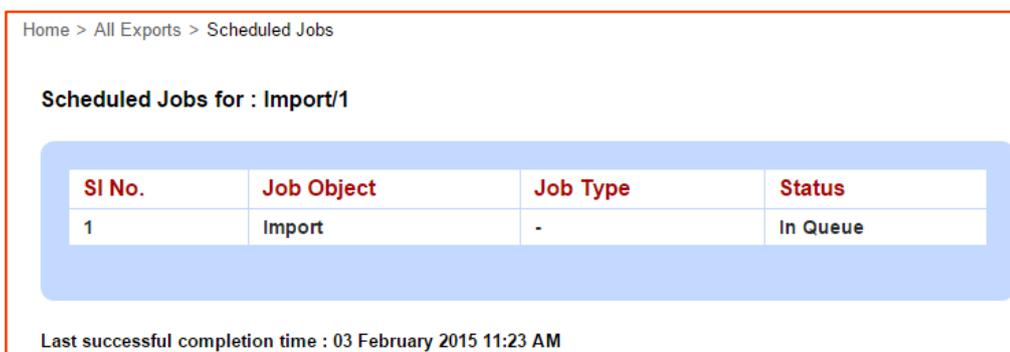
This step may take a while. Keep refreshing the webpage. When the import process is complete, the following message is displayed.

Home > All Exports > Scheduled Jobs

Scheduled Jobs for : Import/1

No scheduled jobs for the selected job type

Last successful completion time : 06 February 2015 02:25 PM

12. Go back to the **All Exports** page, and then click **Imports** to view all imports performed.

Home > All Exports

SI. No.	Name	Options
1	Student Admission	Export CSV	Import data	Bulk edit	Delete	Imports

The **Status** column will display one of the following statuses:

- **Success** – All data has been successfully imported.
- **Success with no data** – The uploaded CSV did not contain any data.
- **Completed with errors** – Some data has failed to be imported.
- **Failed** – All data has failed to be imported.

Home > All Exports > All Imports

Status [All ▼]

SI. No.	Export Name	Date	Status	Options
1	Student Admission	03 February 2015 10:55 AM	Failed	Import log details
2	Student Admission	02 February 2015 04:48 PM	Completed with errors	Import log details

If the custom import is completed with errors or failed, click **Import log details** and view the log details. The log details will display the data upload status for each row. For rows that are were not successfully uploaded, the **Description** column will display the errors that will need to be fixed in the CSV file.

Home > All Exports > All Imports > Log Details

Status [All ▼]

SI. No.	Row Number	Status	Description
1	2	Success	Uploaded to database successfully
2	3	Failed	Month date can't be blank, Student ID can't be blank
3	4	Failed	Month date can't be blank, Month date cant be blank is invalid
4	5	Failed	Month date can't be blank, Student ID can't be blank
5	6	Success	Uploaded to database successfully
6	7	Failed	Month date can't be blank, Student ID can't be blank
7	8	Failed	Month date can't be blank, Student ID can't be blank

When fixing the errors, you can either delete the rows that were successfully uploaded from the CSV file, or you can only fix the errors and perform the import again. If you choose to do the latter, when importing the file, an error message will

be displayed for all previously successfully uploaded rows (For example, Book number is already taken, Barcode is already taken). You can ignore these errors and focus only on the rows that has missing information.

Once all data is uploaded successfully, you can check if the information is structured and displayed correctly in Fedena. If any changes need to be made, you can either make the change in Fedena or you can perform a Bulk edit.

Perform a bulk edit

Perform a bulk edit when a change needs to be made to many records that were uploaded through Custom Import. However, when performing a bulk edit, the following field information cannot be edited as it is required to map to existing records in Fedena.

Data Type	Fields that cannot be edited
Employee Admission	• Employee number|Employee
Student Admission	• Admission no|Student
Guardian Addition	• Ward Admission Number|Guardian • First name|Guardian • Relation|Guardian
Student Attendance	• Student Admission Number|Attendance • Month date|Attendance
Student Exam Scores	• Exam group name|inject • Batch name|inject • Subject code|inject • Student Admission Number|Exam score
Library Book	• Book number|Book
Store Item	• Item name|Store item
Supplier	• Contact no|Supplier • Supplier Type Code|Supplier
Store	• Code|Store

Editing employee privileges?

When editing employee privileges, the following conditions must be followed:

• If you want to provide a privilege – Enter any text in the appropriate column.

• If you want to remove a privilege – Enter '**NULL**' in the appropriate column.

• If you do not want to edit the existing privileges – Leave the privilege columns blank.

1. Open the CSV file that was uploaded through Custom Import process.

2. Make the necessary changes to the data.

3. At the top of your dashboard, click the module access icon > **Data and Reports** > **Custom Imports** to open the **All Exports** page.

4. Click **Bulk edit** beside the previously created file structure.

5. Select the CSV file to be uploaded, and then click the **Upload** button. This step may take a while. Keep refreshing the webpage.

6. Once all data has been uploaded to Fedena successfully, the **Status** column will display the status as **Updated**.

SMS Notifications

The following table will describe when an SMS notification will be sent, and the users who will receive the notification.

Custom Import Type	Who will receive what information?
Student Admission	The students will receive their Fedena login credentials.
Employee Admission	The employees will receive their Fedena login credentials.
Guardian Addition	The parent/guardian set as the emergency contact for a student will receive his/her Fedena login credentials.
Student Attendance – If marked absent	The student and parent/guardian set as the emergency contact will receive a notification if the student is marked absent.

Note: For SMS notifications to be sent, the user's profiles must be updated with their mobile numbers, the **Enabled SMS Features** column must be 'true' if admitting students, and also the SMS settings must be configured for your Fedena institution.

View custom import history

Maintaining a log of the files imported into Fedena is always useful. The **All Exports** page will let you know when a custom import was performed and whether the records were properly imported or not.

1. At the top of your dashboard, click the module access icon > **Data and Reports** > **Custom Imports** to open the **All Exports** page.

SI. No.	Name	Options
1	Student Admission	Export CSV | Import data | Bulk edit | Delete | Imports

Home > All Exports

2. Click **Imports**.

Home > All Exports > All Imports

Status: All

SI. No.	Export Name	Date	Status	Options
1	Student Admission	03 February 2015 10:55 AM	Success	Import log details
2	Student Admission	02 February 2015 04:48 PM	Completed with errors	Import log details

Delete a custom import format

1. At the top of your dashboard, click the module access icon > **Data and Reports** > **Custom Imports** to open the **All Exports** page.

Home > All Exports

SI. No.	Name	Options
1	Student Admission	Export CSV | Import data | Bulk edit | Delete | Imports

2. Click **Delete**.

Troubleshooting custom import errors

The following table describes the steps you can take to fix any custom import errors.

Error Message Description	Possible errors	Solution
Month date can't be blank, Student ID can't be blank	Mandatory columns have not been filled.	Make sure all mandatory columns are filled with appropriate data.
Employee Number is already taken, Username is already taken	A record already exists in Fedena with the same employee number and username you are trying to import.	Check in Fedena and make sure you are not trying to import a duplicate record. Then modify the data in the CSV file accordingly.
Email must be a valid email	There is a mistake with the email address entered.	Check and make sure the entered email address is valid.
Gender attribute is invalid	Data format used to indicate the student's or employee's gender is incorrect.	Enter 'm' for male and 'f' for female. If you do not enter a value, the Gender field for the student/employee record will be considered as Male.
CSV format error. Export format not matching	• Incorrect CSV file imported • Blank CSV file (no column headers) • Additional custom columns added • Columns deleted • Column headers edited or deleted	The CSV file cannot be edited or modified in any way.
private method `split' called for nil:nilclass	Data has been entered in a cell that doesn't fall under a column header.	Make sure that data is entered only under a column header.

APPENDIX A: GLOSSARY

This glossary contains definitions and descriptions of commonly used Fedena terms as well as technical terms.

A	Plugin	Functionality enhancement add-ons that are developed and maintained separate from the Core Modules. Also referred to as add-on modules.
B	Batch	A batch is a group of students who complete a specific course over a period of time through different sections.
C	Core Module	The functionality 'groups' that are developed and delivered as part of the basic application installation process.
	Course	A course is the study of a particular topic in an institution which when completed qualifies the student to graduate or move to the next class.
	CSV	Comma-separated value. A file that stores tabular data in plain-text form separated by commas or semicolons. Microsoft Excel will open .csv files.
F	Fedena Account Administrator	A user who has privileges to create an institution account, manage plugins for an institution, and configure the institution's email and SMS settings.
	Fedena Administrator	A user who has full administrator privileges to a Fedena institution account, including access to all modules, managing user privileges, and the institution's general settings.
	Fedena Employee	A user whose privileges are assigned by the Fedena Administrator according to the role the user will perform in the institution. Also referred to as **Privileged Employee**.

I	**Institution**	A place where individuals of different ages gain an education. Also referred to as School, College, and University.