



Student Import Wizard

Creating a CSV from CMIS



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Introduction

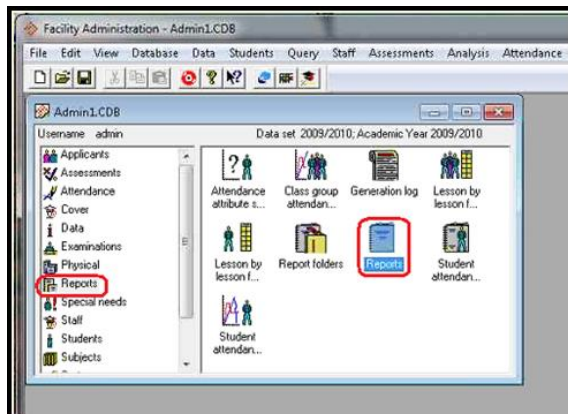
The instructions below explain how to create a CSV file from CMIS for importing into the library system.

This document is split into 2 parts, both are outlined below.

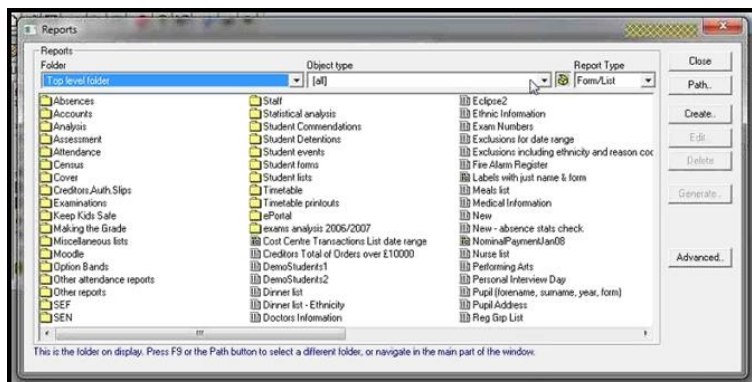
- **Part 1** – Creating the CSV
- **Part 2** – Amending the CSV File

Part 1: Creating the CSV

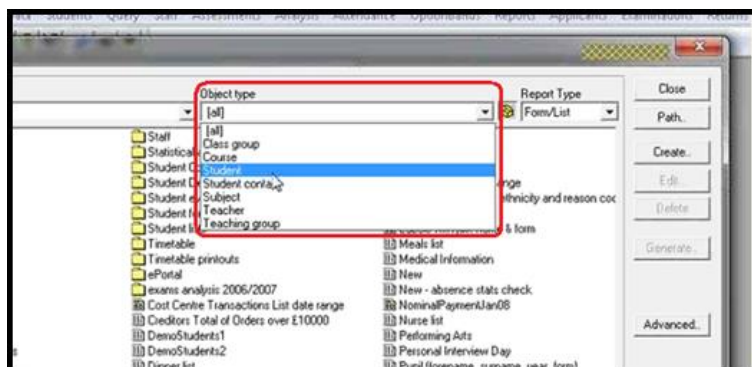
1. Open the CMIS program.
2. From the main vertical menu bar running on the left of the foremost window, click Reports before double-clicking on the Reports icon in the wider space on the right.



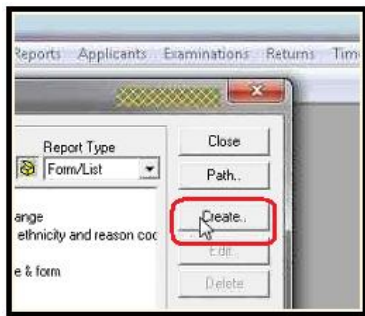
The Reports window will appear.



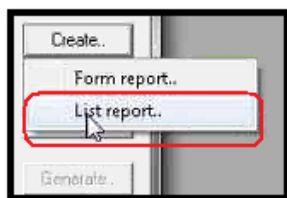
3. From the **Object type** combo-box, find and select **Student** from the list.



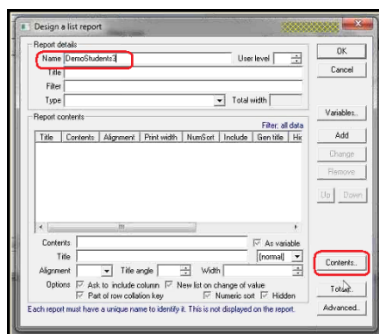
4. Click on the Create... button on the right side of the window.



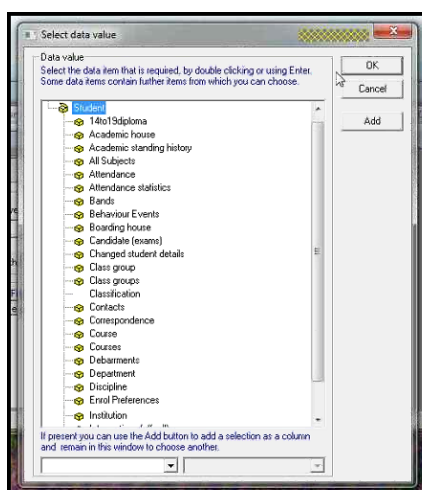
5. Click **List report...** from the context menu that appears.



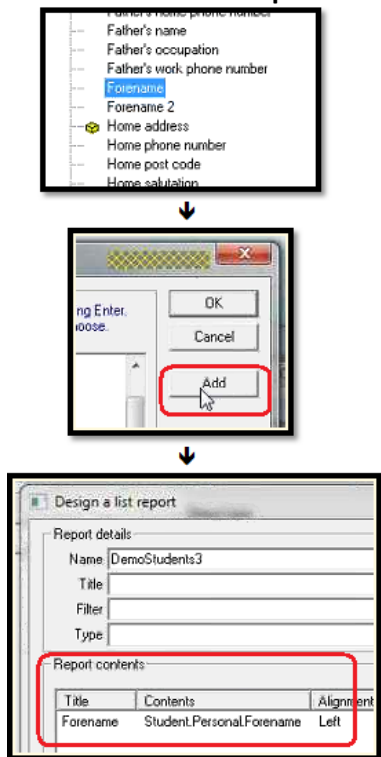
6. In the 'Design a list report' window, type a name for the new report into the **Name** field, then click on the **Contents** button on the right side.



7. The **Select data value** window will appear and lists all the available fields that CMIS uses to store student information.



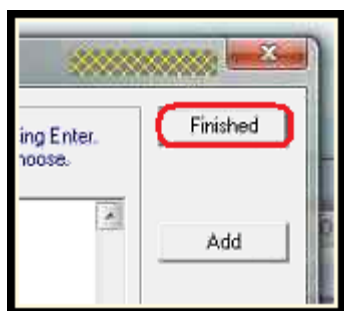
- Double click the **Personal Details** node to see a list of available fields.
- Click once on a field to highlight it before clicking on the **Add** button on the right side of the window to add the desired field to the **Report contents** table (in the background).



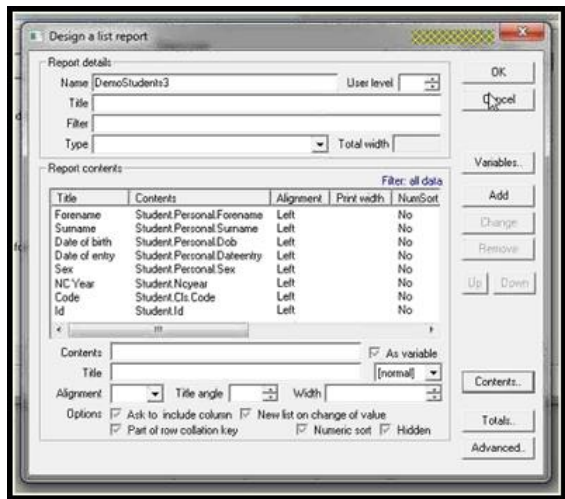
- The following fields from the appropriate nodes must be selected and added to the report contents.

Node	Field	Description
Personal Details	Forename	Student's first name
	Surname	Student's last name
	Date of Birth	Student's date of birth
	Date of Entry	Date of entry to school
	Sex	Student's gender
NC Year	NC Year	Student's year group
Class Group	Code	Student's tutor group
ID	ID	Student's unique ID number

- When finished, click on the **Finished** button to be taken back to the previous window.



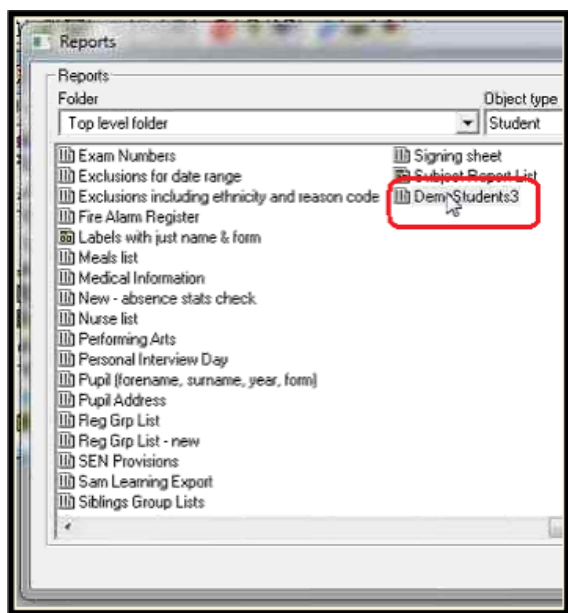
12. The **Reports contents** table will look like this after all fields are added correctly.



13. Click on the **OK** button to complete designing the report and return to the previous window.

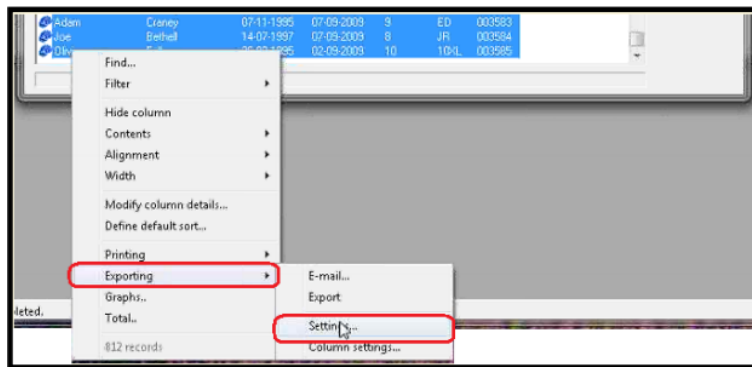


14. Double-click on the icon of the report you have just created.

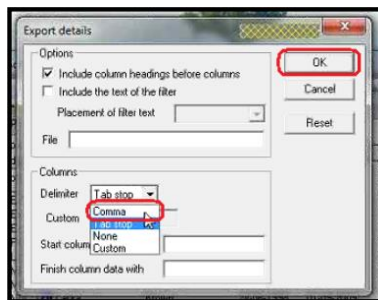


After a few moments a preview of the report with real data will be displayed. **Left click** the first student record to highlight it, scroll down to the bottom of the list using the vertical scrollbar, hold **Shift** on your keyboard and **left click** the last student record – this will highlight all of your student data.

Right click on the last student record and choose **Exporting** then **Settings...** from the context menu that pops up.



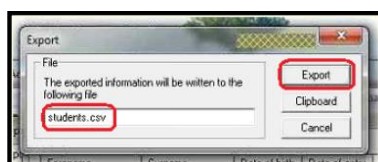
15. Delimiter combobox, select **Comma** from the list before clicking on the OK button on the right side of the window.



16. Back on the full list of highlighted student records, **right click** on the last student record and choose **Exporting** then **Export**.

17. Type the filename students.csv into the 'File' field:

Click the Export button to start exporting the student data.



18. The CSV file will be saved to the **root folder of the CMIS application**. Copy the file, named **student** or **student.csv** and paste it to your work area ready (e.g. Documents) for the next stage of this process.

Part 2: Amending the CSV

As the column headers in the CSV differ from those that the library system expects, they must be renamed so that it can interpret them.

1. Open the file with **Notepad**. Do not use Excel in this case as it may alter with the default formatting.
2. Ensure that the column headers are now labelled in accordance with the below.

CMIS Column Header	Change to
Date of Birth	DateOfBirth
Date of Entry	DateAdded
NC Year	YearGroup
Code	TutorGroup
ID	ManagementSystemID
Sex	Gender

Now you are ready to move on to the next stage. Please note that when you come to import the file, you must choose the **WBL** import option if you are creating the CSV using the above guide.

