



Student Import Wizard

Creating a CSV from Progresso



Contents

Introduction	2
Part 1: Exporting a list as a CSV	3
Part 2: Preparing the CSV for Import.....	5



Introduction

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

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

- **Part 1** – Exporting a list as a CSV
- **Part 2** – Preparing the CSV for Import

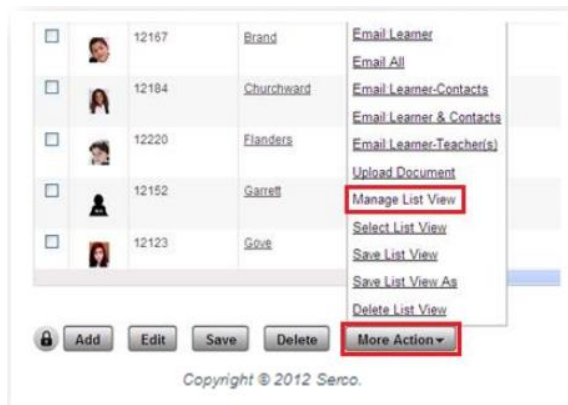
Part 1: Exporting a list as a CSV

Data from a 'view' in Progresso™ can be exported to .CSV format for importing into the library system. The instructions below explain the process of exporting data from this system

1. Firstly, choose the **People** tab and then select either a list of **Learners** or **Staff** members. For a list of students, click **Learners**.



2. At the bottom of the page, click **More Actions** followed by **Manage List View** as shown below

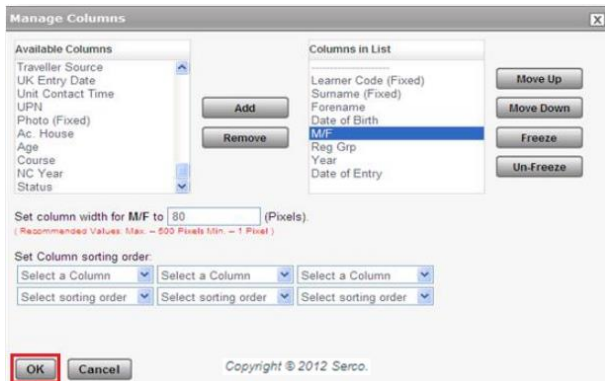


This opens a window where we can customise the columns on the Learner list. Choose from the available columns on the left hand side and click Add which will move them to the Columns in List on the right.

Ensure that **only** the following fields are added to the Columns in List section:

- Learner Code
- Surname
- Forename
- Date of Birth
- M/F
- Reg Grp
- Year

3. Select **OK** once all columns have been added to the **Columns in List** section.



The list can then be saved for convenience so it can be selected when required. Once saved, the list will then be displayed.

4. The next stage is to Export the data from the list view. Click the Select All tick box at the top of the grid to select all the records as shown below.



At the bottom of the screen, click **More Actions** and select **Export All** as shown below.



Choose the option to export to a CSV file and the data will then be exported in this format. The application associated with a CSV file (normally Microsoft Excel) will then be opened displaying the exported data.

Part 2: Preparing the CSV for Import

The next step is to amend the CSV file and format it to make it suitable for importing the program. This section explains this process.

1. Opening the file with **Notepad**, ensure that the column headers are now labelled in accordance with the below.

Progresso Column Header	Change to
Forename	Forename
Date of Birth	DateOfBirth
Reg Grp	TutorGroup
Learner Code	ManagementSystemID
Year	YearGroup
M/F	Gender

Save the file in a CSV format.

2. 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.

