Student Import Wizard

Creating a CSV from iSAMS

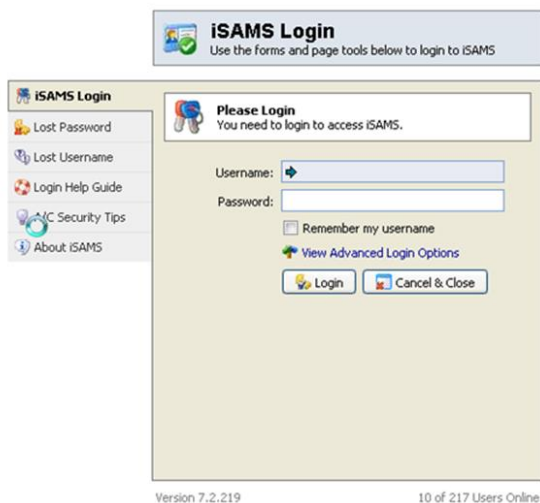|	Creating a CSV from iSAMS	**ID: SIW_iSAMS_1** **Version Number: 1.0** **Date: 11/08/2017**

Contents

Introduction

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

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

- **Part 1** – Designing the CSV File within iSAMS
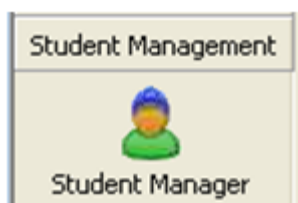
- **Part 2** – Preparing the CSV for Import

Part 1: Designing the CSV File within iSAMS

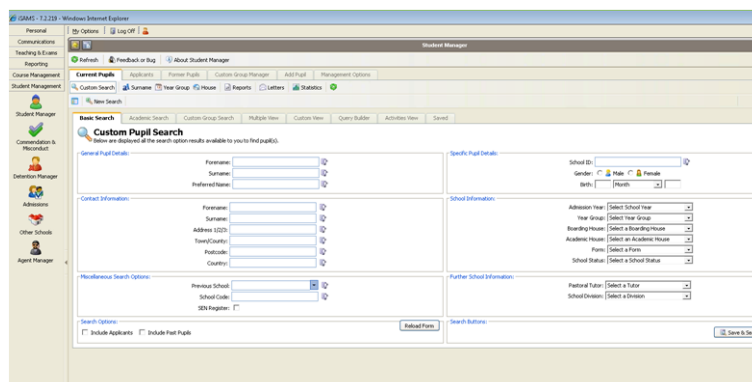1. To begin, open up iSAMS and log into the system.

2. Once logged in, select **Student Management** / **Pupil Management** from the left hand side, then click on **Student Manager** or **Pupil Manager**.

3. By default the **Custom Pupil Search** screen will now be displayed. Leaving all the fields as they are already set click on the **Save & Search** button in the bottom right:
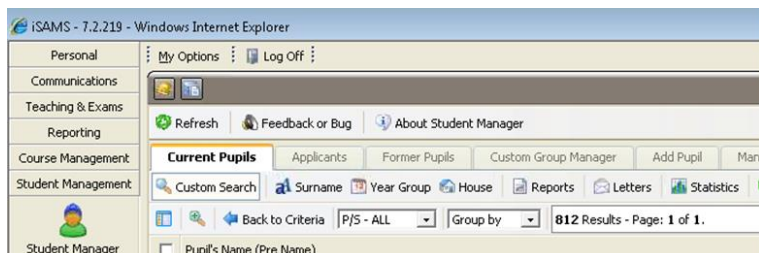

This will perform a search that returns all students.
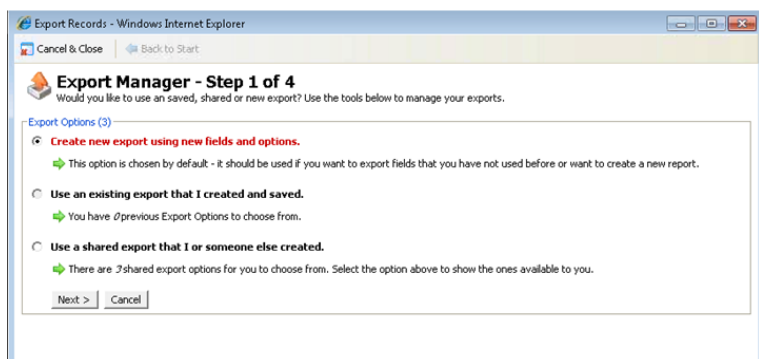
4. Once the search has completed select **P/S All** from the dropdown and tick the **Pupil's Name (Pre Name).**
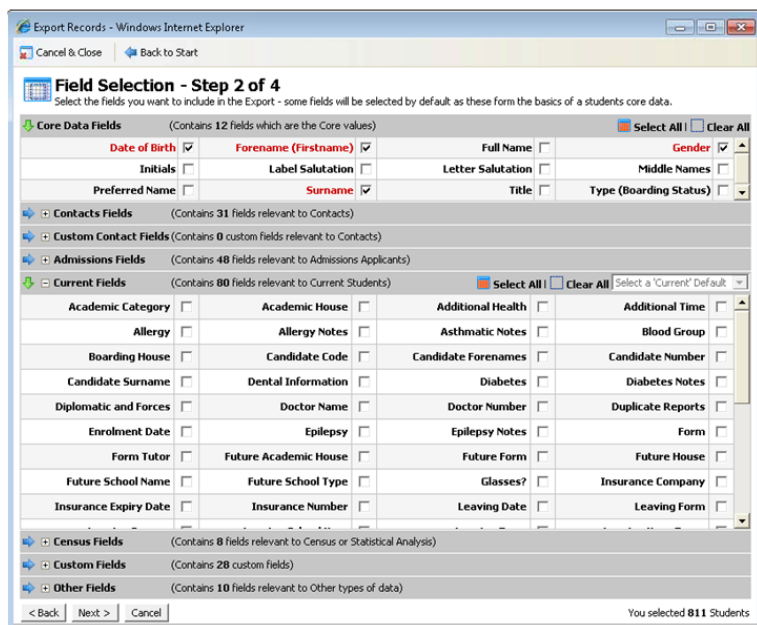
5. The dropdown menu (pictured below) on the right hand side of the screen will now be enabled. Select the **Exporting & Reporting - Export Pupil Records** option
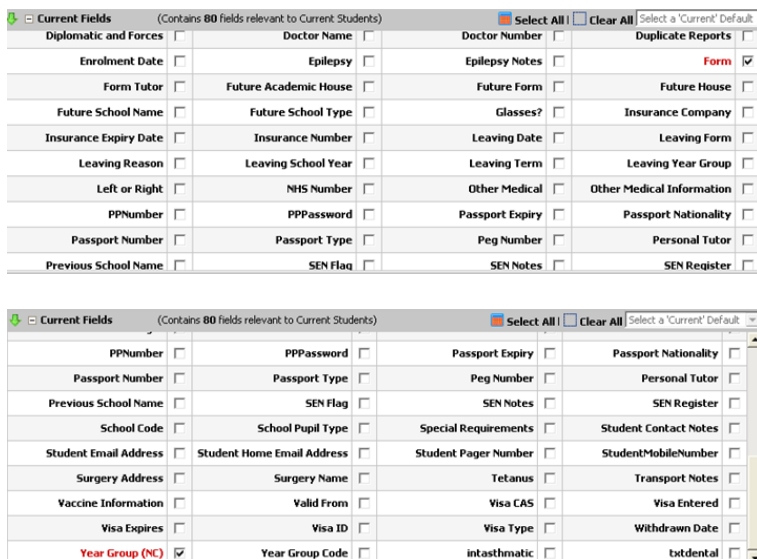
6. Make sure **Create new export using new fields and options** is selected and then click on **Next**

7. On the field selection screen under **Core Data Fields**, un-tick 1 of either **Preferred Name** or **Forename (Firstname)** (depending on which is required to be imported into the library system) and then tick **Gender** and **Date of Birth** .

8. From **Current Fields**, tick the boxes for **Form** and **Year Group (NC)**.

9. Under **Other Fields**, tick **School ID**
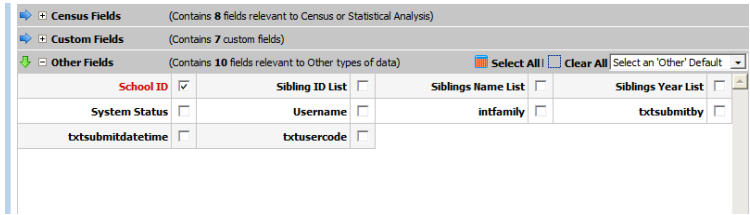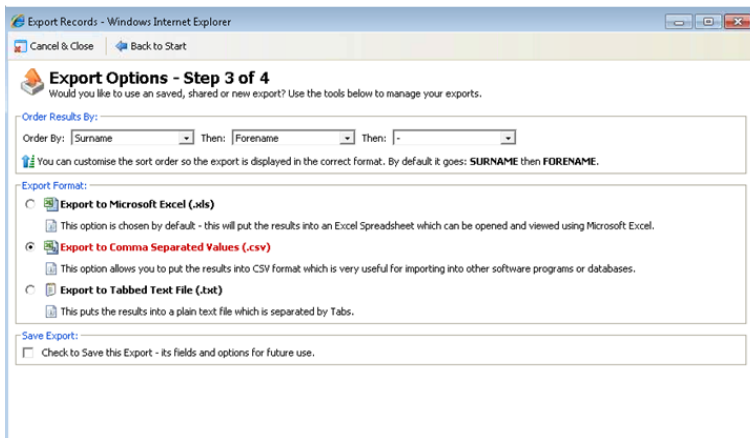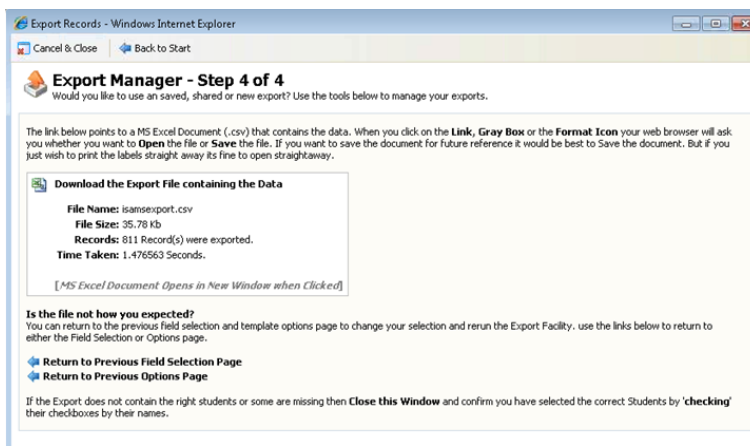

Once the fields have been selected, click **next**.

10. On the **Export Options - Step 3 of 4** screen select **Export to Comma Separated Values** (.csv) then click on **Export File**.

The iSAMS system will now generate the CSV file and display a link. Click on the link and select **Save as** then save the file to the computer.

Part 2: Preparing the CSV for Import

Once the file has been exported, some of the field headers need to be changed so that the library system knows how to read the CSV.

1. Open the CSV file with **Notepad** or an equivalent text editor.

2. Change the relevant column headers so When the necessary columns have been renamed, the *first row* of the CSV will look something like this:

iSAMS Column Header	Change to
A unique identifier for the pupil	ManagementSystemID
Family Name	Surname
First Name	Forename
Their Gender	Gender
Date of Birth	DateOfBirth
Year Group	YearGroup
Tutor Group / Registration Group / Class	TutorGroup

ManagementSystemID,Surname,Forename,Gender,DateOfBirth,YearGroup,TutorGroup

Subsequent lines will include the associated data.

3. 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 **WBLS** import option if you are creating the CSV using the above guide.