



Student Import Wizard

Creating a CSV from iSAMS



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Introduction

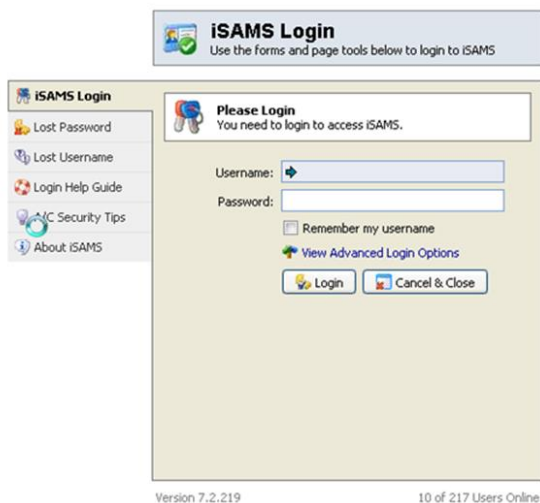
The instructions below explain how to create a CSV file from iSAMS for importing into the library system.

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

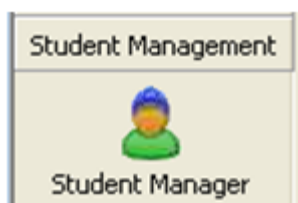
Part 1: Designing the CSV File within iSAMS

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

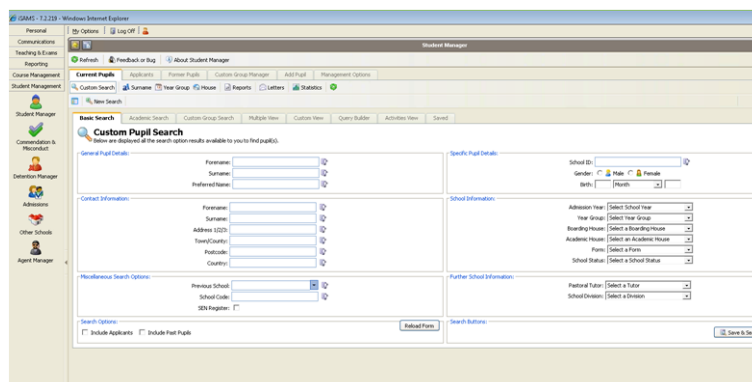


The screenshot shows the iSAMS Login interface. At the top, it says "iSAMS Login" and "Use the forms and page tools below to login to iSAMS". Below this is a "Please Login" section with the instruction "You need to login to access iSAMS." There are input fields for "Username:" and "Password:". A checkbox labeled "Remember my username" is present. Below the password field is a link for "View Advanced Login Options". At the bottom of the login section are two buttons: "Login" and "Cancel & Close". On the left side, there is a navigation menu with options: "Lost Password", "Lost Username", "Login Help Guide", "MC Security Tips", and "About iSAMS". At the bottom of the page, it displays "Version 7.2.219" and "10 of 217 Users Online".

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:



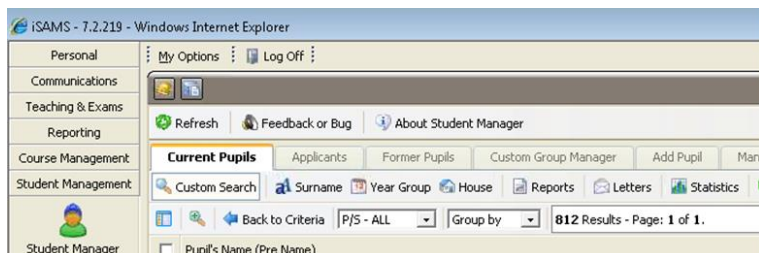
The screenshot shows the "Custom Pupil Search" screen in the iSAMS system. The page title is "Student Manager" and the sub-page title is "Custom Pupil Search". The screen is divided into several sections for data entry:

- General Pupil Details:** Includes fields for Forename, Surname, and Referred Name.
- Contact Information:** Includes fields for Forename, Surname, Address (SDZ), Town/Country, and Postcode.
- Personal Search Options:** Includes fields for Previous School, School Code, and SEN Register.
- Specify Pupil Details:** Includes fields for School ID, Gender (Male/Female), and Birth (Month).
- School Information:** Includes dropdown menus for Admission Year, Year Group, Boarding House, Academic House, and School Status.
- Further School Information:** Includes dropdown menus for Pastoral Tutor and School Division.

 At the bottom of the screen, there are search options (Include Applicants, Include Past Pupils) and a "Save & Search" button.

This will perform a search that returns all students.

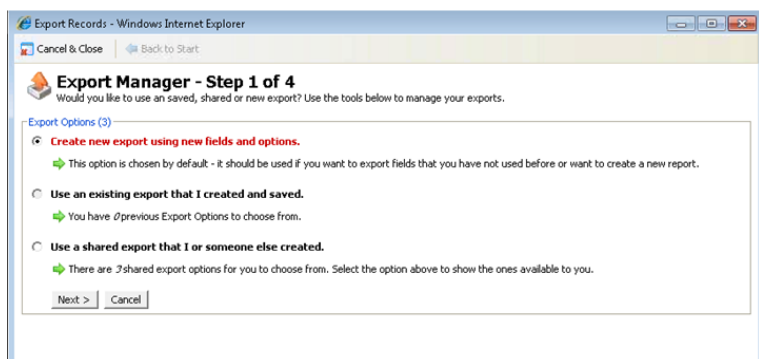
4. Once the search has completed select **P/S All** from the dropdown and tick the **Pupil's Name (Pre Name)**.



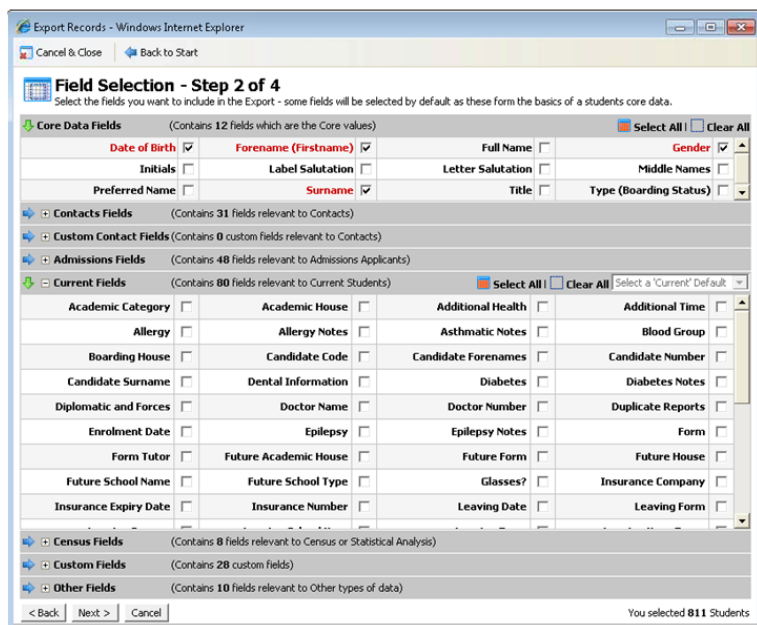
5. The dropdown menu (pictured below) on the right hand side of the screen will now be enabled. Select the **Exporting & Reporting - Export Pupil Records** option



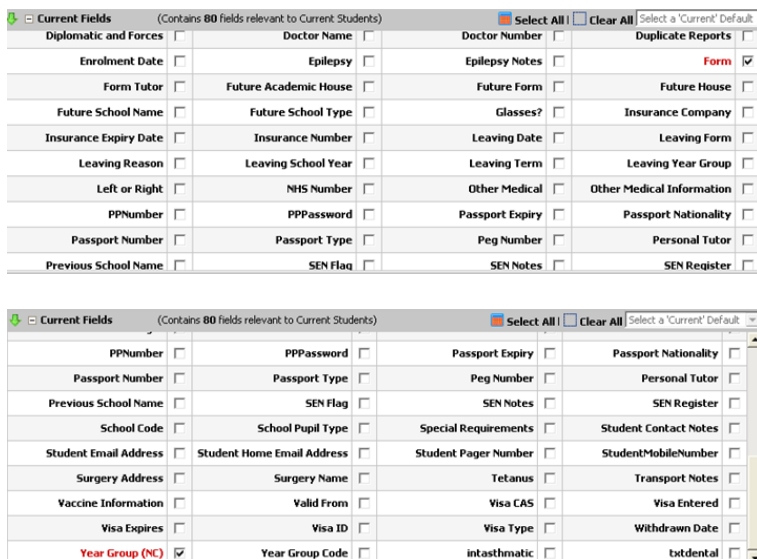
6. Make sure **Create new export using new fields and options** is selected and then click on **Next**



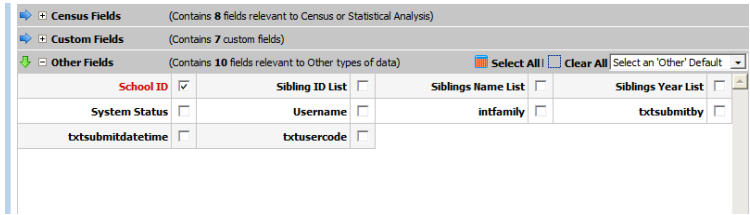
- On the field selection screen under **Core Data Fields**, un-tick 1 of either **Preferred Name** or **Forename (Firstname)** (depending on which is required to be imported into the library system) and then tick **Gender** and **Date of Birth**.



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

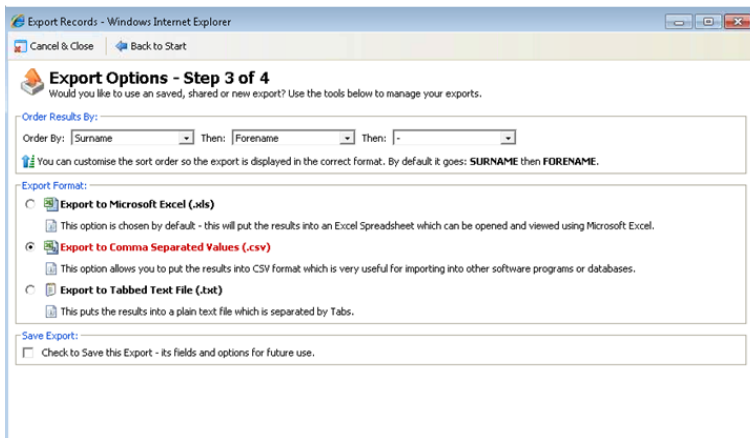


9. Under **Other Fields**, tick **School ID**

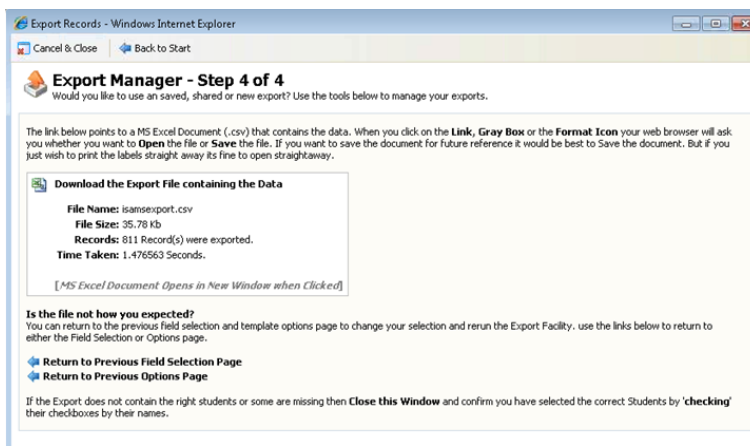


Once the fields have been selected, click **next**.

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.

