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## Tutorial: Importing Student Data

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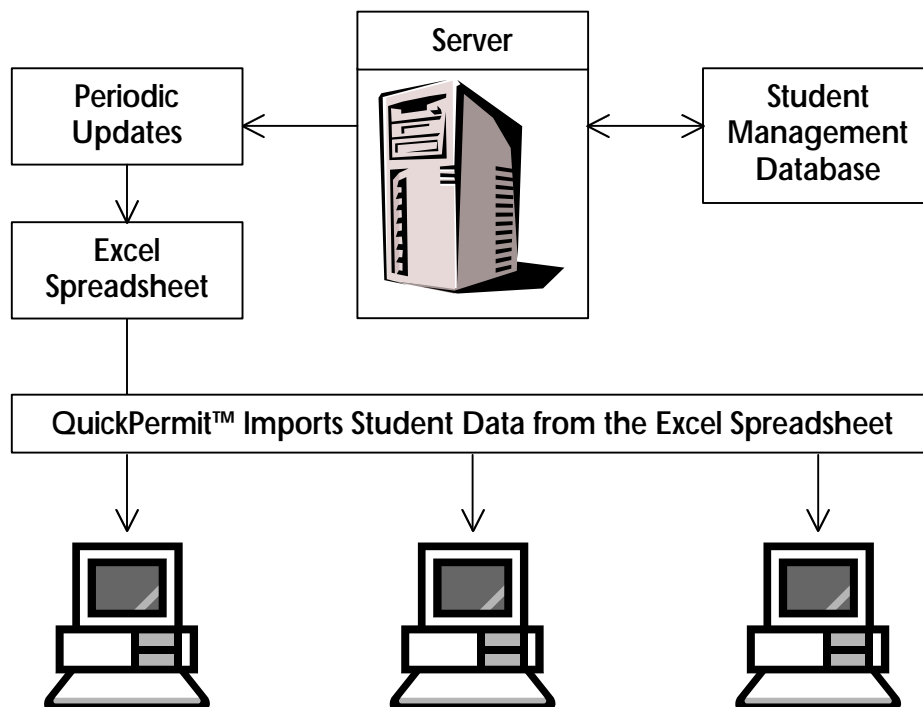
Completing this tutorial will require the limited periodic assistance of the administrator for your student management database system (i.e. Aries, SASI, etc.).

### General Process Overview

- A query is created to export current student data from the Student Management Database to the Excel file. Touchline Software will provide support to assist your database administrator.
- The query is run periodically -- generally after new grades have been posted.
- Workstations import student data into QuickPermit.

*Note: If the workstations do not have a network connection to the server containing the Excel file, the file can be emailed to the workstations. It is not necessary for the workstations to have Excel installed. QuickPermit™ includes the necessary Excel drivers.*

Figure 1

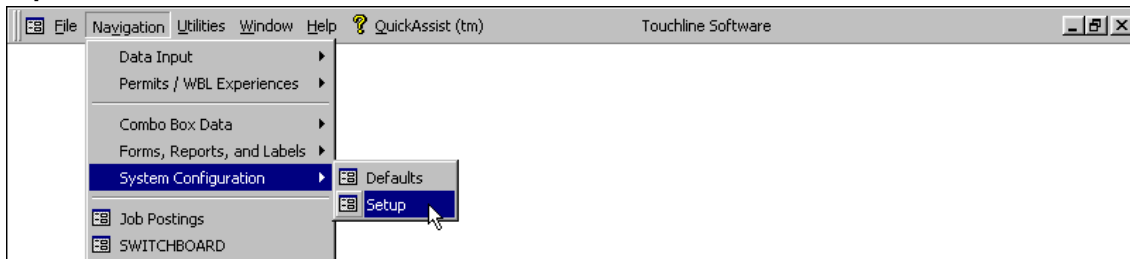


**Establishing the Connection Link to the Excel Spreadsheet**

If the Excel file is stored in a different directory as is QuickPermit's data source, then the path to that directory must be entered on the "System" tab of the DEFAULTS form to establish the connection link.

To find the location of QuickPermit's data source:

- Open the SETUP form.



- Select the "Data" tab.

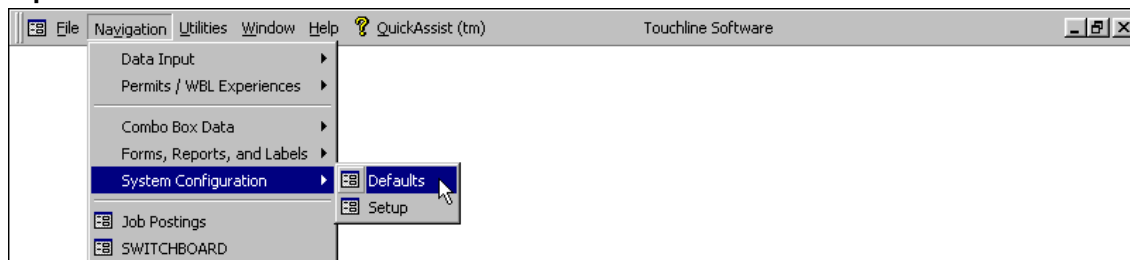
The path to QuickPermit's data source can be found in the "Path to Shareable Data" field.

Path to Shareable Data C:\QPERMIT\Ver4

If the Excel file containing the student data is in the same folder as shown in your "Path to Shareable Data" then the connection link will be automatic.

Setting an alternate path to the Excel data:

- Open the DEFAULTS form.



- Select the "System" tab.
- Enter the path to the directory where the Excel file is stored.

Path to Student Data Excel File  
N:\YourDirectory\SubDirectory (or) \\ServerName\ShareName

## Populating the Excel Spreadsheet

### Step 1

Locate the Excel file "QPermitStudents.xls".

You should use the excel file that is provided with QuickPermit™. It can be found on any machine where QuickPermit™ has been installed. If you setup QuickPermit™ to be shared over a network, then the Excel file should have been copied to the network share\folder used for storing QuickPermit's shared data. If you did not configure for a network setup, the file can be found in the directory where QuickPermit™ was installed (by default: "C:\Qpermit\Ver4" or [Windows Installation Drive Letter]:QPermit\Ver4).

*Note: To find the location of the Excel file when QuickPermit™ has been installed in a custom directory, open the SETUP form and select the "Data" tab. The path to the Excel file should be the same as is shown for the "Path to Local Data". (If instructions are needed to view the "Data" tab of the SETUP form, see the above topic "To find the location of QuickPermit's data source").*

### Step 2

Review the field specifications for the Excel file.

It is important that the field names and sheet names in the Excel file are not changed and that the field data is equivalent to the specifications noted below.

#### Common Mistakes to Avoid

1. Importing fixed-width fields into the Excel file
2. Skipping a row in the Excel file
3. Changing or deleting any of the column headers
4. Repositioning a column
5. Including a student record that contains a missing required field
6. Including a student record that contains field data that is not allowed
7. Including a dash symbol in the zip code field
8. Including values for the "SchoolCode" field that don't match one of the registered Site ID's (as entered on the "Sites" tab of the SETUP form). Local installations (Non-network) should enter "0" in the "SchoolCode" field for all students.

## **Touchline Software**

[support@touchlinesoftware.com](mailto:support@touchlinesoftware.com)

### **Required Fields:**

#### **SchoolCode**

- Integer between 1 and 2147483647 (no commas)
- Enter a school-assigned numeric School ID. The number used must match the network site numbers entered on the 'Sites' tab of the 'Setup' form (while connected to the server data files).

#### **FirstName**

- Text -- maximum of 25 characters and spaces
- Enter the student's first name.

#### **LastName**

- Text -- maximum of 35 characters and spaces
- Enter the student's last name.

#### **StreetAdd**

- Text -- maximum of 50 characters and spaces
- Enter the student's primary street address.

#### **City**

- Text -- maximum of 30 characters and spaces
- Enter the student's city of residence.

#### **State**

- Text -- maximum of 50 characters and spaces
- Enter the student's state of residence (2-character abbreviation or full state name).

#### **Zip**

- Text -- 5 or 9 numeric digits
- Enter the student's zip code. Required 5 or 9 numeric digits. Do not include a dash "-" symbol or a blank space in 9 digit zip codes.

#### **BirthDate**

- Text -- maximum of 50 characters and spaces
- Enter any expression that Windows can interpret as a date. The following are a few possible valid formats:

September 4, 2002

Sept. 4, 02

Sept 04, 02

4 Sept-2002

4 Sept. 02

4 September 2002

9/4/2002

09/04/02

#09/04/02#

#9/4/2002#

**Optional Fields:**

**StudentCode**

- Text -- maximum of 20 characters and spaces
- Enter a unique code for each student.

**Initials**

- Text -- maximum of 10 characters and spaces
- Enter student's middle initial(s).

**County**

- Text -- maximum of 20 characters and spaces
- Enter county of residence.

**Sex**

- Text -- maximum of 50 characters and spaces
- Enter the student's gender as "M", "F", "Male", "Female", or any abbreviation that begins with an "M" or an "F". Case is not important (lower case characters will be converted to upper case characters).

**Grade**

- Integer between 7 and 12 or text up to 50 characters
- Enter any of the following:
  - 7, Seventh, Seven
  - 8, Eighth, Eight
  - 9, Ninth, Nine, Freshman, F\* (any word/abbr. that starts with an "F")
  - 10, Tenth, Ten, Sophomore, Soph, Soph., So, So.
  - 11, Eleventh, Eleven, Junior, J\* (any word/abbr. that starts with a "J")
  - 12, Twelfth, Twelve, Senior, Sen, Sen., Sr, Sr.

**SSN**

- Text -- maximum of 50 characters and spaces
- Enter the student's social security number. Required 9 numeric digits, either with or without dashes or other special characters and symbols.

**HomePh**

- Text -- maximum of 50 characters and spaces
- Enter the student's phone number. Required 7 or 10 numeric digits, either with or without dashes or other special characters and symbols.

**GuardianTitle**

- Text -- maximum of 20 characters and spaces
- Enter the title for addressing letters: Mr., Mrs., Ms., Dr. etc.

**GuardianFName**

- Text -- maximum of 25 characters and spaces
- Enter the first name of only one parent or guardian.

**GuardianLName**

- Text -- maximum of 35 characters and spaces
- Enter the last name of the parent or guardian.

**Counselor**

- Text -- maximum of 25 characters and spaces

- Enter the student's assigned counselor. This doesn't need to be first and last name. Should be abbreviated to fit into the 25 characters allowed. (i.e. Green, A. Green, Mr. Green)

**ExAbb**

- Integer between 0 and 32767 (no commas)
- Enter the number of excused period absences for the current grade period.

**UnExAbb**

- Integer between 0 and 32767 (no commas)
- Enter the number of unexcused period absences for the current grade period.

**GPA**

- Number between 0.00 and 4.00 (round to two decimals)
- Enter the GPA for the current grade period. Note: it will allow a number higher than 4.00 should your school grade on a scale higher than a 4-point scale.

**NbrF**

- Integer between 0 and 32767 (no commas)
- Enter the number of "F" grades for the current grade period.

### Step 3

Export data from your student management database system into the Excel file "QPermitStudents.xls".

*Note: The process of populating the Excel spreadsheet will need to be done by the administrator for your student management database. The first time it is done, it may take some time (depending on your system and skill level). However, once it has been done successfully, updating the Excel file after subsequent grade report periods should only take a few minutes.*

*Touchline Software is available to provide personal support to your database administrator for exporting student data to Excel.*

There are several possible ways to populate the Excel file with student data.

- Create an export query and run it directly from your Student Management Database.
- Create a query to display the student data then copy and paste it into the Excel file.
- Create a query and save its data as a delimited (not fixed-width) text file and then import it into the Excel file.

*Important: If sites that are not configured for network access will be importing student data, it will be necessary to setup separate directories for each school and use the value '0' for the 'SchoolCode' in the Excel file. Each site will need to enter the path to their assigned directory on the 'System' tab of the 'Defaults' form. Only enter the path up to and including the directory name. Do not include the file name in the path.*

*Note: If you don't have data for an optional field, just leave it empty. Never rename, reorder, or delete a field header in the Excel spreadsheet.*

*GPA and Attendance data, although imported, cannot actually be viewed in QuickPermit™. However, the data is used within the program to verify that students qualify for a work permit.*

*Tip: Because the school/site number is used to restrict the records that can be imported into QuickPermit™, you can include all students in the district into a single Excel spreadsheet. When the "Import Students" process is run, only students for the local site are imported. However, separating the files by school will improve the processing time.*

## Step 4 Importing Student Data

### Existing Students:

QuickPermit™ uses a three-tier record-matching algorithm to determine if an imported student record matches a pre-existing student record.

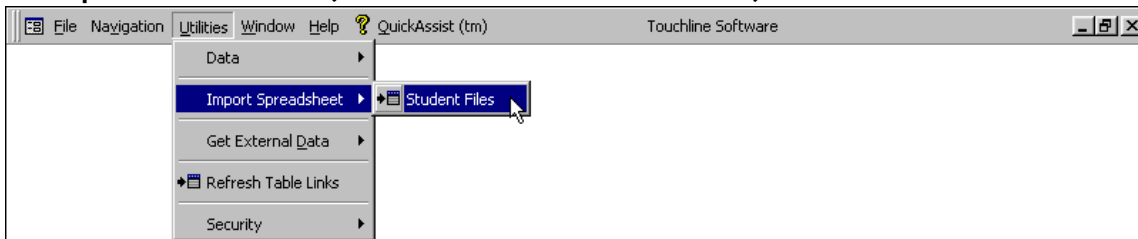
- Importing students that are already in your system will not create duplicates. Pre-existing student data will be updated automatically -- synchronizing the QuickPermit™ student files with those that have been imported.
- If a match is found for a student who was previously enrolled at a different site, then that student record will be automatically transferred to the local site.

*Note: Two settings control updating an existing field (that contains data) with an imported field (that does not contain data). By default, imported fields that don't contain data cannot overwrite pre-existing data. The default options may be changed on the 'System' tab of the 'Defaults' form.*

### New Students:

Students that are not already entered into QuickPermit will be added to your current student file -- just as if you had typed them into QuickPermit™ manually, but without the typos.

### To Import Student Data (from the MAIN SWITCHBOARD)



Student data should be imported as often as the data in the Excel file is updated. At a minimum, this should be done after new grades have been posted at the end of each grade report period.

*Note: If no records are imported, check to make sure that the "SchoolCode" field in the Excel spreadsheet matches the "Network Site Number" field shown on the "Data" tab of the SETUP form. Only student records where these two fields match will be imported.*