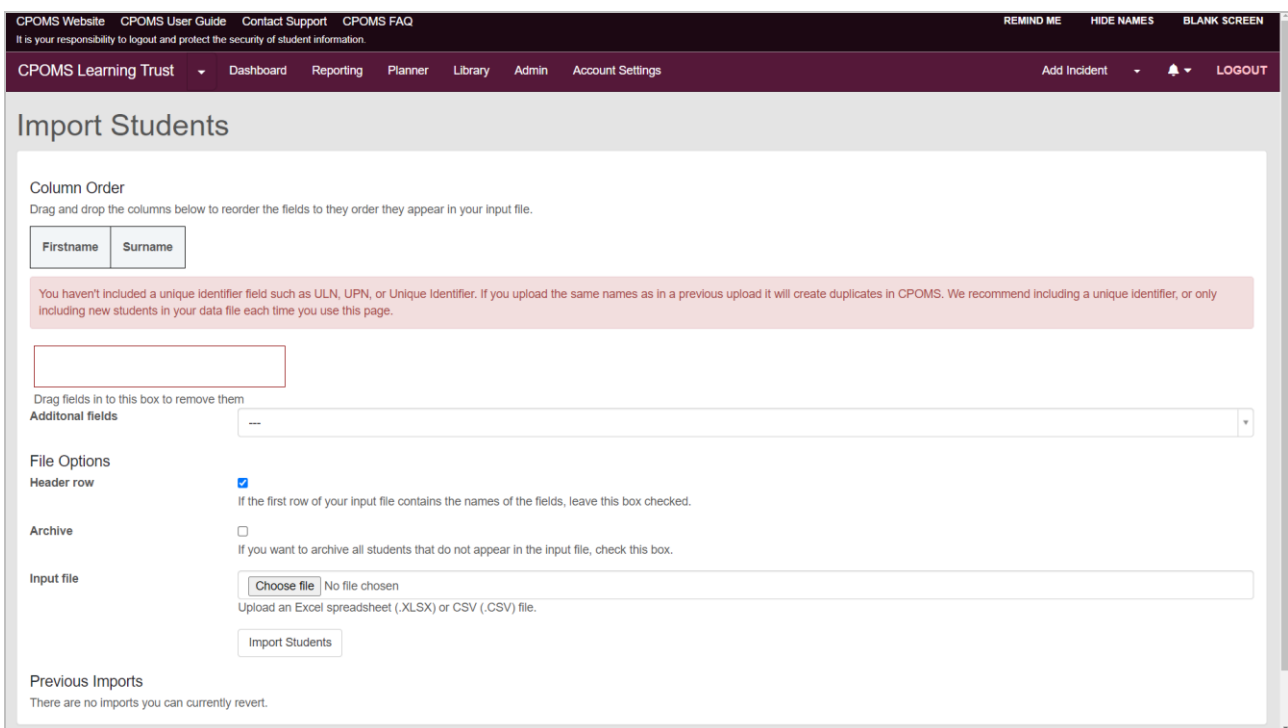


## CPOMS Manual Imports Guide

We provide an easy interface for importing student data into CPOMS manually.

To access the 'Import Students' area, simply append [/admin/student\\_imports](/admin/student_imports) to your usual CPOMS web address.

This will lead you to the 'Import Students' area, where you can upload your student information via a spreadsheet. We accept data files in CSV, .XLS and .XLSX formats. *Please note, to access this area you are required to login to CPOMS, with two factor authentication.*



### Column Order

- Firstly, click on 'Additional fields' and select all of the headings included within your input file/spreadsheet.



**We highly recommend that you include a UPN, ULN or Unique Identifier in your student import.** The reason being, should you re-upload the spreadsheet with additional students in the future, or if a student(s) is included in a future MIS import, the UPN/ULN/Unique Reference will be identified and the system will not duplicate their profile. Without a reference of some sort, the system cannot differentiate between students. **If you do not use UPNs or ULNs you may add a Unique Identifier which can be your own internal reference.**

- Ⓒ You can then drag and drop the column headings on screen, to match the order as they appear in your input file. The header names do not need to be worded identically to your input file header name, **but they must appear in the same order as they do within the file.**
- Ⓒ **There must not be columns in your input file that are not listed on the on-screen import students form.**
- Ⓒ Should you need to remove a column that you have added to the import students form, simply drag and drop it into the box with the red outline (immediately below the header fields).

*It is important that the values of the columns match our expectation. There is a table detailing what values and format we accept at the end of this document.*

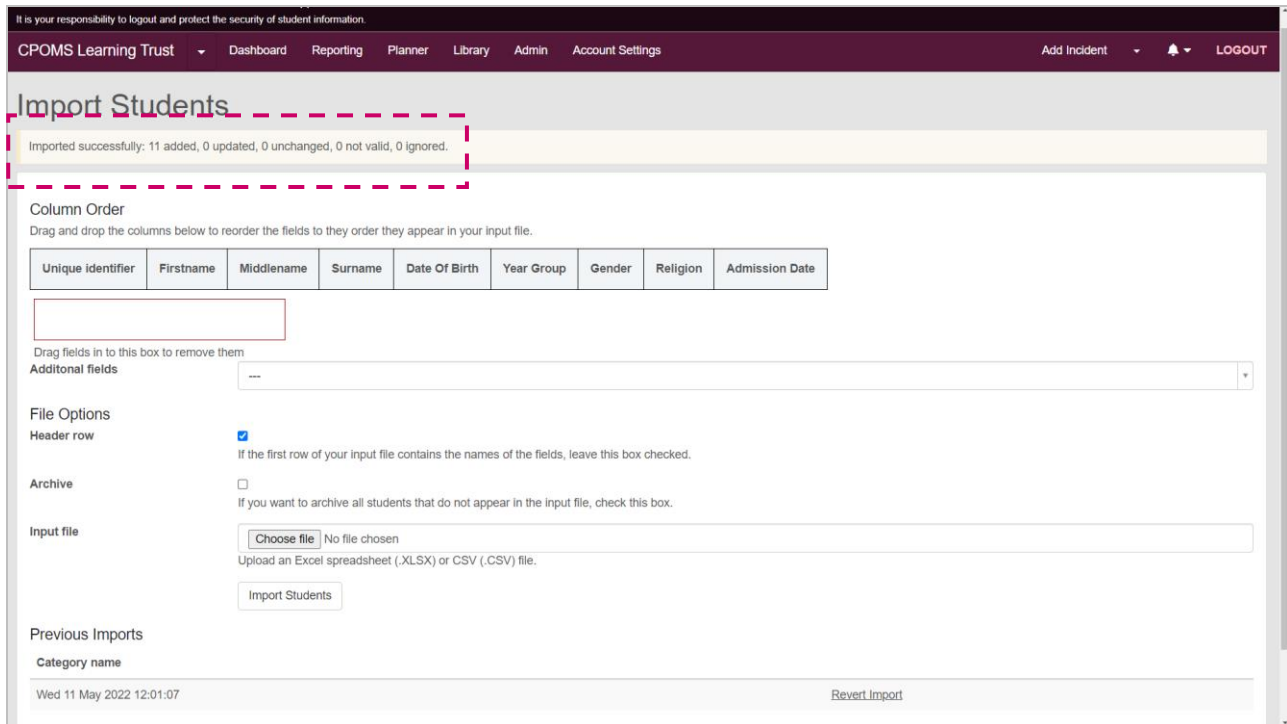
### File Options

- Ⓒ **Header row:-** If the first row of your input file contains the column heading, please leave the 'Header Row' check box selected.
- Ⓒ **Archive:-** If you wish to archive all students previously uploaded to the system, that do not appear in this input file, please select this option.
- Ⓒ **Input file:-** Click '**Choose File**' to locate and select the input file from your device. *We accept data files in CSV, .XLS and .XLSX formats.*


Once you are happy that you have included all of the required columns and they appear in the exact order of those in your input file, please click on '**Import Students**'.

*Depending on the size of your input file, it may take a short while for it to upload - **please do not click on the 'Import Students' button more than once.***

Once your import has completed you should see something similar to the following:-



The import will now appear under the **'Previous Imports'** section and if required you can revert the import here.



**We recommend that you save your spreadsheet in a safe place** so you can easily update it and add any new students to it and re-upload.

## How to create a different 'Group' type

The system includes two default group type options for 'Tutor Group' and 'Year Group'. If you would like to group your students by a different grouping, *i.e. House*, you would need to create a new group within the Admin area of CPOMS firstly. Please see below instructions:-

- 🕒 Log into CPOMS and go to **'Admin' > 'Groups'**.
- 🕒 Click on the **'New Group'** button, to the right-hand side of the page.
- 🕒 **New Group**
  - **Name:** Enter a **'Name'** for the grouping, *e.g. House Stark*.
  - **Group type:** Type in your preferred **'Name'** for the group type and click on it, *i.e. House*.
- 🕒 Click on the **'Add Group'** button when you are ready.

As you will include all of the individual group names on your manual import spreadsheet, you do not need to add each one individually as the others will be picked up from your spreadsheet. Once you have added the first group, it will appear in the 'Student Imports' area, within the 'Additional Fields' for you to now select.

## 'Additional Fields' Types

Column Name	Accepted Values	Example Values
Firstname	Any text	Michael
Surname	Any text	Campbell
Unique Identifier*	Any text	001 ( <i>*Your internal reference system</i> )
UPN	A valid UPN	U852244101001
ULN	A valid ULN	5487634238
Date Of Birth	Date as text	07/02/2011
Gender	"Male" or "Female" or "M" or "F"	Male
Middlename	Any text	Jonathan
Known As	Any text	Mike
Telephone	Any text	01756 797766
In LA Care	"Yes" or "No" or "Y" or "N" or "True" or "False" or "T" or "F"	No
Free School Meals	"Yes" or "No" or "Y" or "N" or "True" or "False" or "T" or "F"	Yes
Date of Arrival	Date as text	07/09/2015
Admission Date	Date as text	07/09/2015
Religion	Any text	No Religion
SEN (Special Needs)	"Yes" or "No" or "Y" or "N" or "True" or "False" or "T" or "F"	No
<b>Address</b>		
Address 1	Any text	CPOMS House
Address 2	Any text	Acorn Business Park
Address 3	Any text	Skipton
Address 4	Any text	BD23 2UE
<b>Ethnicity</b>		
Ethnicity Code	Any text	WBRI
Ethnicity Name	Any text	White – British

<b>SEN Status</b>		
SEN Stage Code	Any text	N
SEN Stage Name	Any text	No Special Educational Need
<b>Attendance</b>		
Present Marks	Any number	32
Authorised Absences	Any number	0
Unauthorised Absences	Any number	0
Possible Marks	Any number	32
Lates	Any number	2
Missing Marks	Any number	0
Attendance not required	"Yes" or "No" or "Y" or "N" or "True" or "False" or "T" or "F"	No
<p><i>After you have input your attendance figures, the percentage is worked out for you. This can be found in the student's profile &gt; 'Attendance' tab.</i></p> <p><i>If you choose to include attendance fields you must re-upload the attendance data on a regular basis to keep it up to date, i.e. weekly or by term. Therefore, we recommend that you save your spreadsheet in a safe place so you can easily update it and re-upload it.</i></p>		
<b>Groups</b>		
Tutor Group	Any text	7M
Year Group	Any text	Year 7
<p><i>Please see note on page 3 'How to create a different 'Group' type' for instructions on adding additional custom groups to your manual import list.</i></p>		

For further assistance on any of the above please do not hesitate to contact us on **01756 797766** or [ps@cpoms.co.uk](mailto:ps@cpoms.co.uk).