

# 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** 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.* 

CPOMS Website CPOMS User Guide It is your responsibility to logout and protect the		MS FAQ			REMIND ME	HIDE N	IAMES	BLAN	K SCREEN
CPOMS Learning Trust 🗸	Dashboard Reporting	Planner Library	Admin	Account Settings	Add Inc	ident	÷	<b>.</b>	LOGOUT
Import Students									
Column Order Drag and drop the columns below to re Firstname Surname									
You haven't included a unique identif including new students in your data f			ou upload th	e same names as in a previous upload it will create duplicates in CPOMS. We rec	ommend including	a uniqu	e identif	ier, or on	у
Drag fields in to this box to remove the	em								
Additonal fields									¥
File Options									
Header row	If the first row of your input	t file contains the names	of the field	s, leave this box checked.					
Archive	□ If you want to archive all s	tudents that do not appe	ar in the inp	put file, check this box.					
Input file	Choose file No file ch Upload an Excel spreadsh		SV) file.						
	Import Students	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,						
Previous Imports There are no imports you can currently	v revert.								

### **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, <u>but they must appear in the same order as they do within the file.</u>
- C 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.
- C 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 follow	ing:-
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is your responsibility to logout and protect the security of student information.									
POMS Learning Trust 👻	Dashboard Reporti	ing Planner Library	Admin Account	Settings			Add Incident	· •	LOGOU
nport Student	s								
mported successfully: 11 added, 0 u	ipdated, 0 unchanged, 0 r	not valid, 0 ignored.							
Column Order Drag and drop the columns below to	reorder the fields to they	order they appear in your ir	iput file.						
Unique identifier Firstname	Middlename Sur	rname Date Of Birth	Year Group Gend	er Religion	Admission Date				
			1						
Drag fields in to this box to remove Additonal fields	them								٣
File Options Header row	✓ If the first row of your	input file contains the name	s of the fields, leave this	box checked.					
Archive	□ If you want to archive	e all students that do not app	ear in the input file, chec	k this box.					
nput file	Choose file No fil Upload an Excel spre	lle chosen eadsheet (.XLSX) or CSV (.C	CSV) file.						
	Import Students								
Previous Imports Category name									
Wed 11 May 2022 12:01:07					R	evert Import			

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



## 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.
- C 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	<b>001</b> (*Your internal reference system)		
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 "Tru "False" or "T" or "F"		No		
Address				
Address 1	Any text	CPOMS House		
Address 2	Any text	Acorn Business Park		
Address 3	Any text	Skipton		
Address 4	Any text	BD23 2UE		
Ethnicity		·		
Ethnicity Code	Any text	WBRI		
Ethnicity Name	Any text	White – British		

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SEN Status					
SEN Stage Code	Any text	Ν			
SEN Stage Name	N Stage Name Any text				
Attendance					
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			

After you have input your attendance figures, the percentage is worked out for you. This can be found in the student's profile > 'Attendance' tab.

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.

Groups				
Tutor Group	Any text	7M		
Year Group	Any text	Year 7		

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.

For further assistance on any of the above please do not hesitate to contact us on

01756 797766 or ps@cpoms.co.uk.

