SAS Schools

If this is the <u>very first time</u> data will be extracted from SAS for the Student Contacts, follow the steps below:

a) Go to the following link https://www.cepl.com.au/downloads/
b) Enter password (**nforma2019**)
c) Click on the link 'SAS XML' under Resources For Parent/Guardian Notifications
d) Download the file 'nForma-Guardian-Contacts.zip' and save to a location of your choice.
e) Unzip the file.
f) Now continue from Step 1 below.

If you require an updated file with new parent/guardian, follow the steps below:

1. Go to - People

2. Export and Merge

3. Enhanced Export

4. Scroll to find the Export Name **'nForma Guardian Contacts.xml'**

5. Click Select and OK to open

If the Export file is not listed:

6. Click on Binoculars (Check if it appears here. If it does you can select it and click OK. You can now skip step 7)

7. Click on Load (Check if it appears here. If it is you can select it and click Open. Then click OK.)

8. Click Preview to view data

9. Check that the data is up to date. If adjustments need to be made please go back to SAS and update the parent/guardian details

10. If all data appears to be correct, click on the Export button

11. Save the file to a location of your choice with an appropriate file name.
   **Make sure that you save the file as a CSV with Headers.**
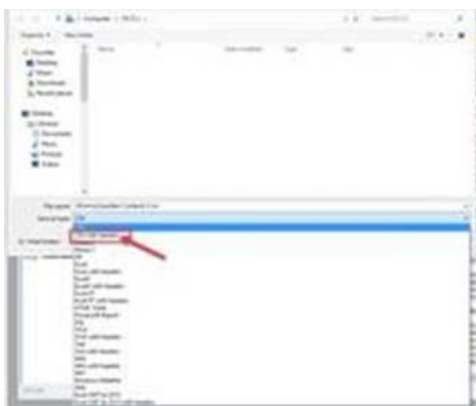
 Press OK to complete. If prompted about correspondence entry, click No

Once the **nForma Guardian Contacts** template is loaded into SAS it can be <u>regenerated as many times as needed</u>, e.g. when parent/guardian records are updated.

To check that the file contains all relevant data, follow these steps:

1. Open a blank Excel sheet
2. Go to FILE> Open
3. Make sure that the 'File type' in Excel is showing ALL.
4. Browse for the file you saved and select.
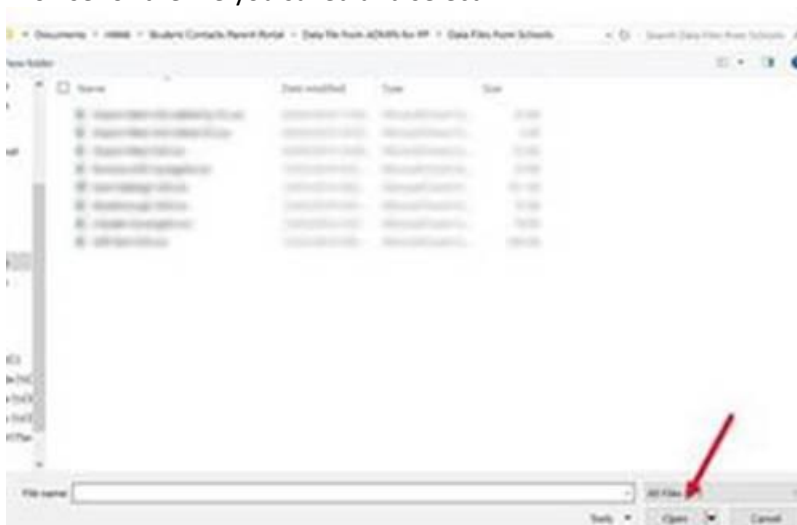
5. Click OPEN.
6. Check that all the information is correct. Most of the errors in the test schools have been:

   - Invalid email addresses (e.g. missing the @)
   - Invalid mobile phone numbers (e.g. too short or too long)
   - Relationship Types with incorrect spelling
   - Parents/Guardians with missing First or Last names
   - Student names not matching between SAS and nForma
   - STKEY not found for a student (usually because a student has left and hasn't been deactivated)
   - No Primary Contact details for a student

7. Fix the errors in SAS and then regenerate the loaded enhanced report '**nForma Guardian Contacts**'.
8. If you are satisfied that the data is correct, import it into nForma.

MAZE Schools

In Maze, go to the following:
1. Student Families
2. View and Maintain Family Details
3. Contact for nForma Export
4. Choose EXPORT to…

If you are satisfied that the data is correct, import it into nForma.

Synergetic Schools

OPTION: 1

Contact Maha (servicedesk@ceomelb.catholic.edu.au)

Request to add a query to your eSIS program referred to as: **MSQ_31 nForma Parent Detail**

OPTION: 2

In Synergetic, run the following SQL query:
SELECT vStudentContactsAndRelations.StudentID,
vStudentContactsAndRelations.RecipientMailSalutationPrimary,
vStudentContactsAndRelations.RecipientPreferred,
vStudentContactsAndRelations.RecipientSurname,
vStudentContactsAndRelations.RecipientID,
vStudentContactsAndRelations.RecipientEmail,
vStudentContactsAndRelations.RecipientDefaultMobilePhone,
vStudentContactsAndRelations.RecipientMobilePhone,
vStudentContactsAndRelations.RecipientOccupMobilePhone,
vStudentContactsAndRelations.StudentGiven1,
vStudentContactsAndRelations.StudentSurname,
vStudentContactsAndRelations.StudentID,
vStudentContactsAndRelations.Relationship

FROM Synergetic E????_Live.dbo.vStudentContactsAndRelations vStudentContactsAndRelations WHERE
(vStudentContactsAndRelations.FileYear=enter current year) AND (vStudentContactsAndRelations.Relationship='Father')
OR (vStudentContactsAndRelations.Relationship='Mother')
If you are satisfied that the data is correct, import it into nForma.

eSIS

Overview:

This quick reference guide explains how to export data from eSIS for 3rd party vendors.

Details:

ICON has created a new method of extracting data for 3rd party vendors directly from eSIS using Crystal Reports.

Document Details:

Part A – Represent Steps to export the data

Part B – Represent a list of available reports

Appendix 1-2 Shows a list of fields exported in each export

Part A: How to export data from eSIS

Steps	Details
1. Login to the ICON **ePortal** 2. Select **eSIS** 3. Select **Students** 4. Select Student Crystal Reports Available The **Synergetic Reports Available** search screen opens	

5. Select '**Students Modules or STU**'

6. In the Search field, type the word '**3rd**'

There are 2 data exports available - parent and students

7. Select the data export you want to send to external vendor (i.e. **Parent Details for 3rd party Vendors – Data Export**) or (**Student Details for 3rd party Vendors – Data Export**)

8. Press **Ok**

A parameter screen opens

Synergetic Reports Available

Choose From
- ○ Favourites
- ◉ Module STU
- ○ All Modules

🔍 3rd

Report	Report Code	Module	Technology
Parent Details for 3rd party Vendors - Data Export	EXP_CEOVIC_VEN_PAR	STU	Crys...
Student Details for 3rd party Vendors- Data Export	EXP_CEOVIC_VEN_STU	STU	Crystal

Add to Favourites   User: NPRDIDS\mmichael   OK   Cancel

9. **File Year** = Enter the Year

10. Click on **View** to generate the report

Please note for the **student details** data export you will need to enter **File Year** and **File Semester** as parameters

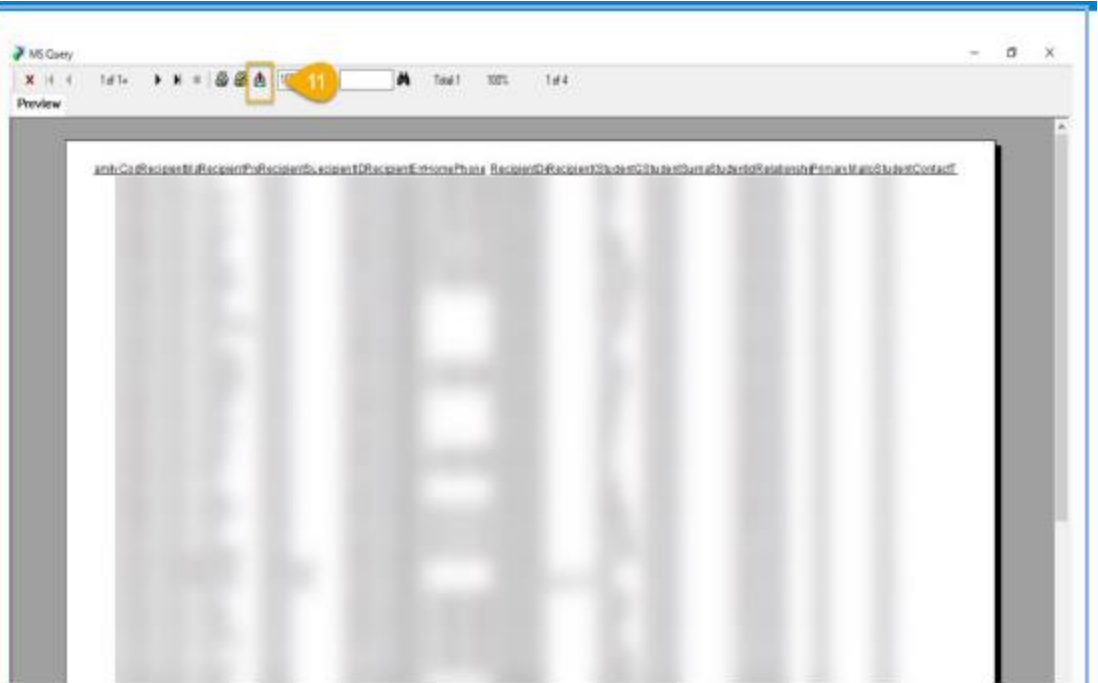**Parent Details for 3rd party Vendors - Data Export [Crystal]**

Required Selections

File Year: 2020

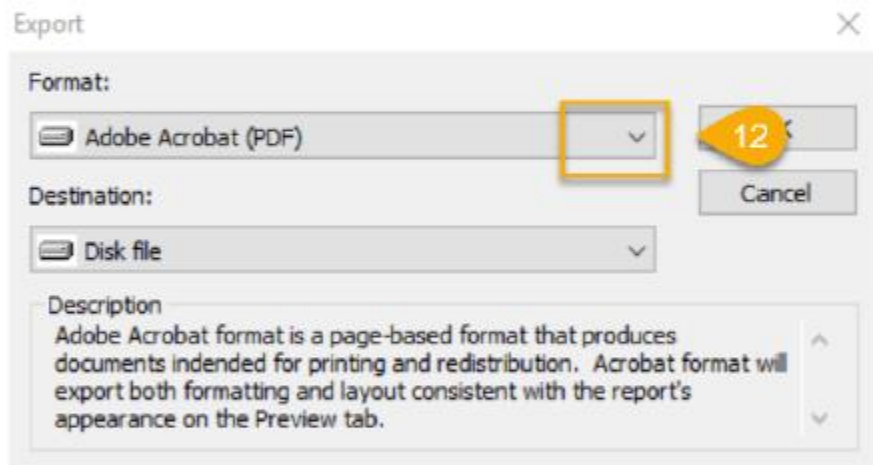Once Report is generated please Export the Data to Excel

Pri... | View... | Clear All | Cancel

11- Click on the **Export** button on the top of the page to open the Export Box. The export button looks like an envelope
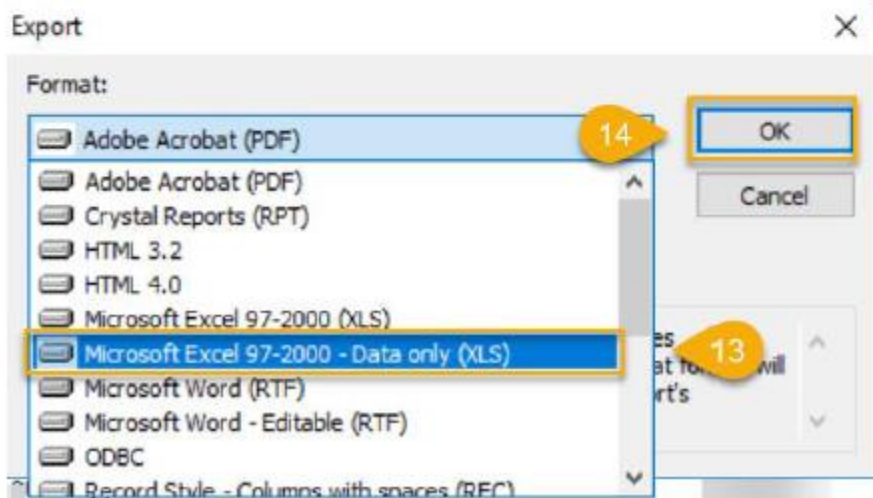

The export wizard opens. It defaults to format: Adobe Acrobat (PDF)

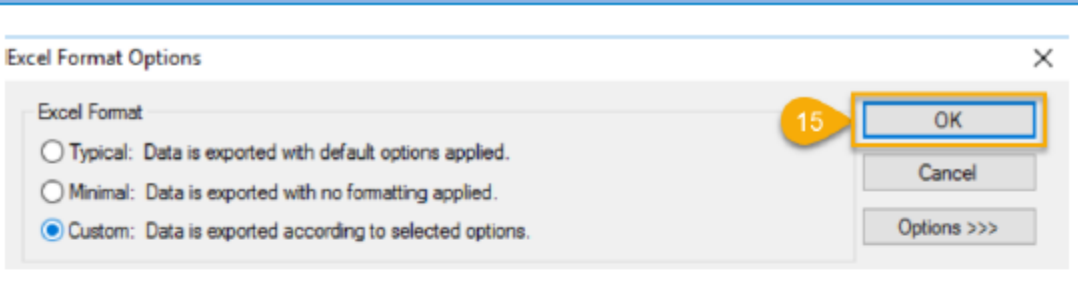12- In order to download the data in an Excel Format, click on the **down arrow**

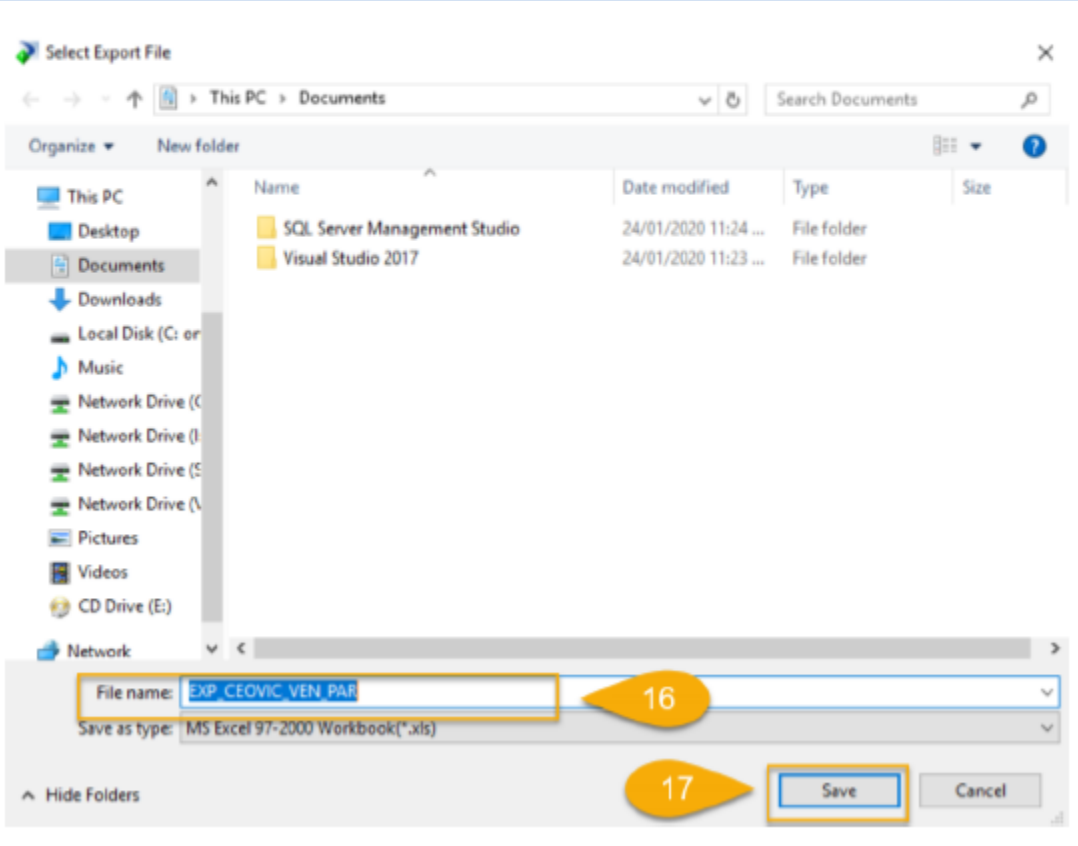13- Select Microsoft **Excel 97-2000 – Data Only (XLS)**

14- Click **Ok**

|	
15- Click **Ok** to confirm the format options. It defaults to **Custom** Format	**Excel Format Options** ✕ Excel Format ○ Typical: Data is exported with default options applied. ○ Minimal: Data is exported with no formatting applied. ● Custom: Data is exported according to selected options. **15** → OK Cancel Options >>>
16- To save the file: Enter an appropriate **File Name**, the System defaults to the report name 17- Press **Save**	Select Export File ✕ ← → ↑ ⬛ › This PC › Documents ∨ ↻ Search Documents 🔍 Organize ▼ New folder ▦ ▾ ❓ 💻 This PC 🖥 Desktop 📄 Documents ⬇ Downloads 💽 Local Disk (C: or 🎵 Music 🔌 Network Drive (C 🔌 Network Drive (I 🔌 Network Drive (S 🔌 Network Drive (\ 🖼 Pictures 📹 Videos 💿 CD Drive (E:) 🔗 Network Name	Date modified	Type	Size 📁 SQL Server Management Studio	24/01/2020 11:24 ...	File folder 📁 Visual Studio 2017	24/01/2020 11:23 ...	File folder File name: EXP_CEOVIC_VEN_PAR **16** Save as type: MS Excel 97-2000 Workbook(*.xls) ∧ Hide Folders **17** → Save Cancel

Import CSV file into Student Contacts

It is critical that the CSV file is in the correct format with the correct headers.
1. To check, open the CSV file. Double click on your saved file.
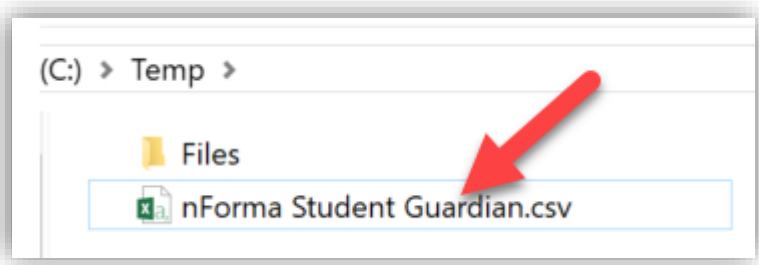
2. The file should open in Excel. Check that the data in the columns looks 'generally' correct.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Family_Code	Greeting	First_Name	Last_Name	Contact_Code	Email_Address	Family_Phone	Mobile	Phone_at_Home	Phone_at_Work	First_Name	Last_Name	Student_Code	Relationship	Primary_Mailing_Contact
2	KK01	Mick and Deana	Mick	Kanga	1	steve@nforma.com.au	123445678	412341234	95431111		Katie	Kanga	8000	Father	Y
3	KK01	Mick and Deana	Deana	Kanga	1	judy@nforma.com.au	123445678	412341234	12312234234		Katie	Kanga	8000	Mother	N
4	KK01	Mick and Deana	Mick	Kanga	2	steve@nforma.com.au	123445678	412341234	95431111		Paul	Penguin	8002	Father	Y
5	KK01	Mick and Deana	Deana	Kanga	2	judy@nforma.com.au	123445678	412341234	12312234234		Paul	Penguin	8002	Mother	N
6	RR01	John	John	Jones	3	dorothy@nforma.com.au	2783642736	412341234	2765625826		Rosie	Rosella	8003	Mother	Y

Some known data formatting issues when data file is opened

SAS:

Occasionally, data extracted in SAS is not in the correct CSV format.

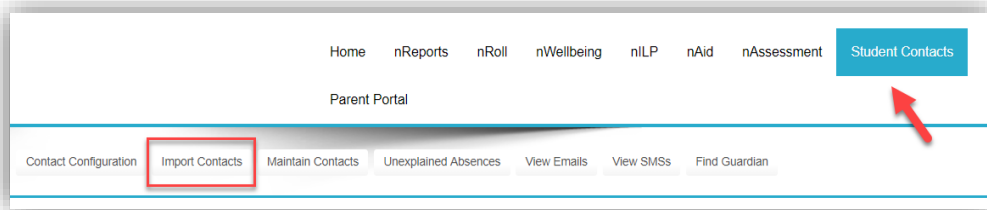Here is an example:
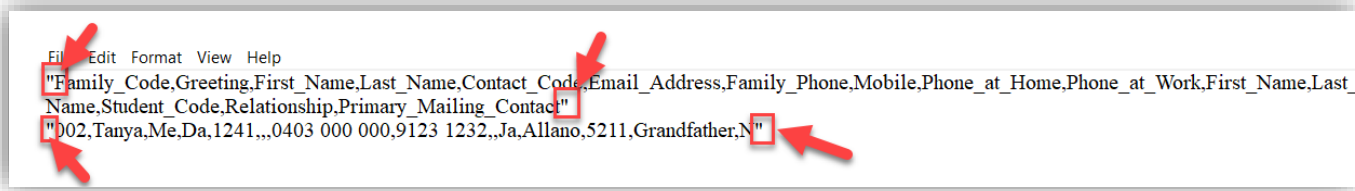
This sample has inverted commas for each new row of data.

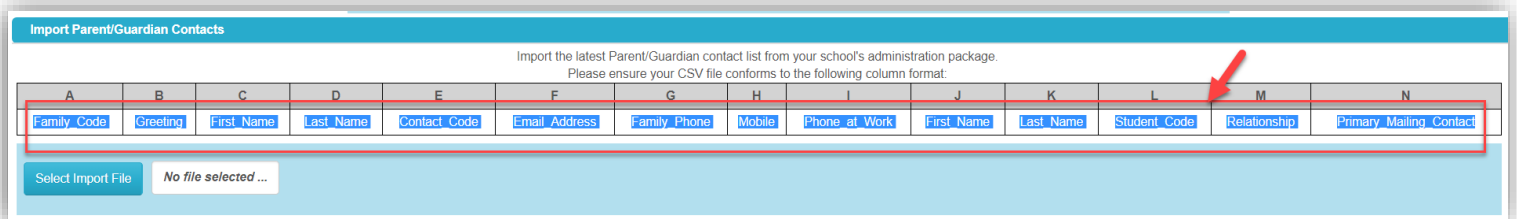SOLUTION: Check instructions again and regenerate the file.

MAZE

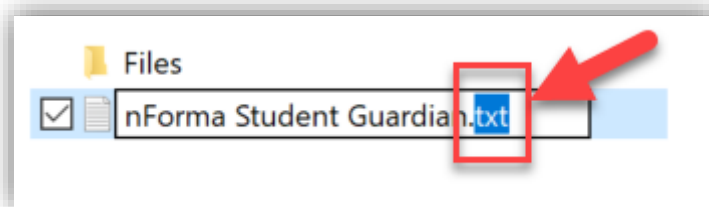Data extracted from MAZE has the incorrect headers

1. To fix, open nForma and go to STUDENT CONTACTS> Import Contacts
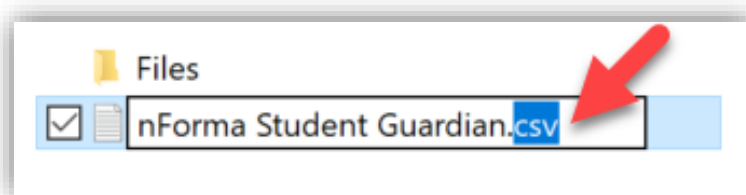

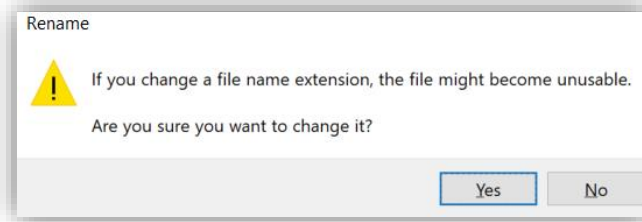2. Copy **ONLY** the headers from column A to column N.

3. Go to the file location of the student data file. Make sure you have file extensions enabled in Windows (ask your IT tech on how to do this if it's currently hidden)
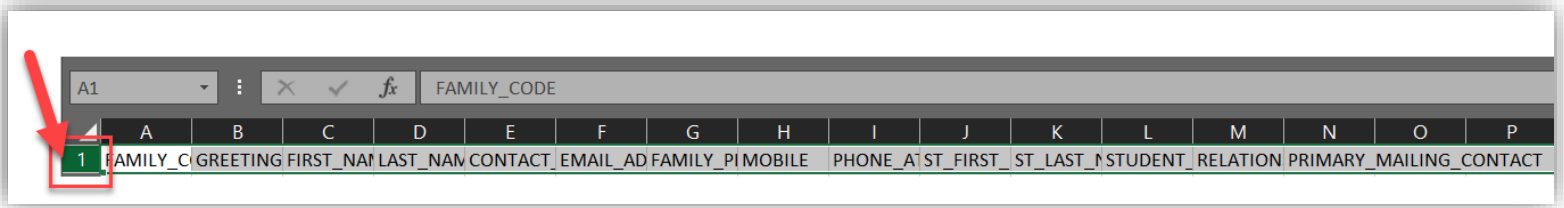

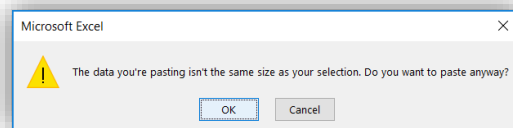4. Click on the **TXT** extension. Change it to CSV

5. If prompted to rename the file, click YES.

6. Open the renamed CSV file. Highlight the first row which contains the headers by clicking on the label '**1**'. This will highlight the entire row.
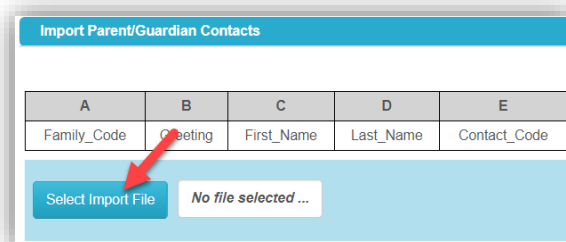

7. Click PASTE or (CTRL+V) on your keyboard.
8. You will be prompted if you want to continue. Click OK.

9. Save the file and replace the existing version. You will be prompted if you want to continue. Click YES.
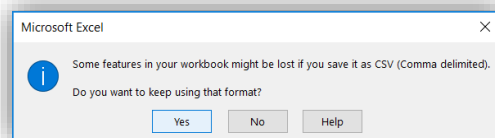
10. Now load the data into nForma> Student Contacts and follow the prompt.

SYNERGETIC

Data extracted from SYNERGETIC have:

- incorrect headers and
- 2 missing headers that are required but will not be used.

Use the table below to relabel your headers to the correct ones and insert the 2 missing headers.

Current Extract using Query	Required Headers for nForma
AddressID	ID
MailNameJoint	StudentContactMailSalutation
Given1	StudentContactPreferred
Surname	StudentContactSurname
ID	StudentContactID
DefaultEmail	StudentContactDefaultEmail
missing column	**StudentContactHomePhone**
MobilePhone	StudentContactMobilePhone
missing column	**StudentContactOccupPhone**
StudentGiven1	StudentGiven1
StudentSurname	StudentSurname
StudentID	StudentID
Relationship	StudentContactRelation

11. Once fixed, SAVE it and import into nForma> Student Contacts

Import Parent/Guardian Contacts

A	B	C	D	E
Family_Code	Greeting	First_Name	Last_Name	Contact_Code

Select Import File   *No file selected ...*