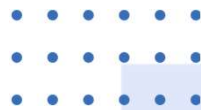


Good morning, Aeries!

Mass Add Data into Aeries



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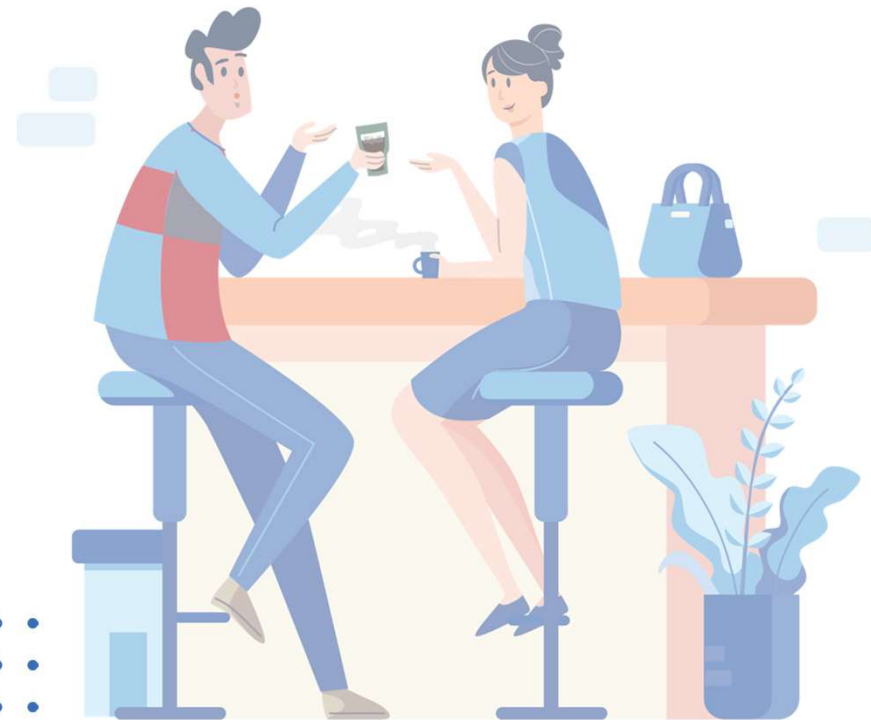
Speaking today:



Jaime Perez | Aeries Trainer
jaime@aeries.com



Moderator | Drea MacDonald | Aeries Trainer



Good morning, Aeries!

A brief discussion of how The Mass Add Student Related Data feature allows users with appropriate permissions to add a record into a selected table for many students selected by Grade, Counselor/Teacher, Class, or by utilizing a Keep or Skip in Query

Need To Know

Create New / Load Import
-Know target table

All records will have the same data

Familiarize yourself with the data fields

Know how you will update the data:
-Grade, Query, Counselor/Teacher, Class

Nice To Know

Security permissions to mass
add student data

Target Table

Target Fields

Security

Security

Accessing the **Mass Add Student Related Data** page requires **Read** permission to the page in Security.

Other Student Data	
Mass Add Student Related Data	✓

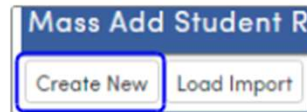
To use this page to mass add records to a particular table, the user must also have both **Insert** and **Mass Update** permissions to that table.

Table/Program Area	Query Tbl	Read	Insert	Update	Delete	Mass Update
Other Student Data						
Activities and Awards	ACT	<input type="checkbox"/>	✓	<input type="checkbox"/>	<input type="checkbox"/>	✓

The page also supports the special **Administer** permission. Users with Administer permission to the page are permitted to overwrite layouts saved by other users. This topic will be covered in more detail in another article.

Creating and Saving Layouts

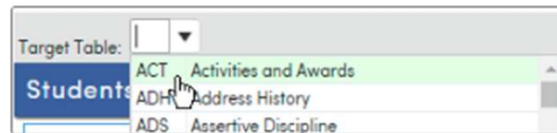
To begin, click the **Create New** button at the top of the page.



Mass Add Student R

Create New Load Import

Next, choose a target table to which records will be added.



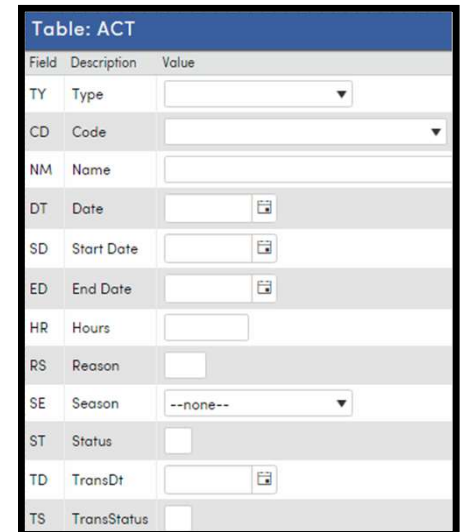
Target Table: ▼

Students

ACT Activities and Awards

ADH Address History

ADS Assertive Discipline



Field	Description	Value
TY	Type	▼
CD	Code	▼
NM	Name	<input type="text"/>
DT	Date	<input type="text"/>
SD	Start Date	<input type="text"/>
ED	End Date	<input type="text"/>
HR	Hours	<input type="text"/>
RS	Reason	<input type="text"/>
SE	Season	--none-- ▼
ST	Status	<input type="checkbox"/>
TD	TransDt	<input type="text"/>
TS	TransStatus	<input type="checkbox"/>

A list of fields for the selected table will display. Enter a value for each field that you need to populate. The available input depends on the type of data that goes in the field.


- Date fields will have date pickers; time fields will have time pickers
- Fields that store codes from the **Code (COD)** table or fixed code sets will have drop-down lists
- Yes/No fields will have check boxes
- Other fields will simply have text boxes where values can be entered

Creating and Saving Layouts

Saving a Layout

The list of fields and their selected values is referred to as a **layout**. A layout does not have to be saved to run the mass add process, but saving allows the layout to be reused and is recommended.

If you wish to save the layout, click the **Save Layout** button.



Reset Save Layout

Next, enter an **Import ID** and **Description** for the layout. Click the **Save** button.



Import ID: PE Lock Fee Description: Add FEE records for PE locks Save

Note: Fields (such as Comments fields) that can store longer values may be used in the Mass Add process. However, values longer than 100 characters will NOT be saved to the layout. These longer values, when needed, can be entered each time the layout is used to mass add records to the selected student-related table.

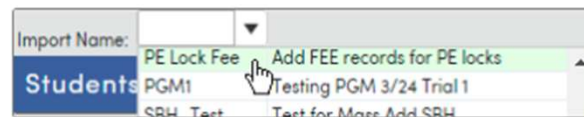
Loading an Existing Layout

Loading an Existing Layout

Once a layout has been saved, it can be loaded any time the **Mass Add Student Related Data** page is visited. Click the **Load Import** button at the top of the page.



Next, choose an existing layout from the **Import Name** drop-down.

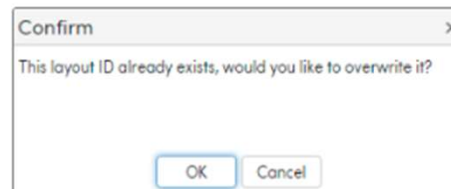


The list of fields will load with the values that were previously saved.

Modifying a Layout

Once the layout is loaded, changes can be made to the field values. These changes can either be used for a one-time mass add without saving, or the changes can be saved to the layout.

If you attempt to save a layout ID that already exists, you will be prompted to overwrite the existing layout. Either click **OK** to overwrite, or click **Cancel** to return.



Student Selection

The selection of students utilizes a robust search tool that has multiple options for finding students. If a KEEP or SKIP query is already in place, all searches are limited by the students kept. If you simply wish to use all students kept, just click the **Load Students** button without performing any search on this form. However, the **Load Students** button cannot be used to select all students in a school or district if no search criteria have been entered and no KEEP or SKIP query is in place.

Students to Update

☒ Search by Student ☐ Search by Counselor ☐ Search by Class

Grade Limit:

Not Selected

Student Search:

☐ Include Inactive Students

Load Students

Select students and click the right arrow to include them.

Select students and click the left arrow to remove them.

Search Results

All

None

Record Count:

Selected Students

Clear All

Record Count: 0

Student Selection

Search by Student

Student names can be searched by typing all or part of a first or last name into the **Student Search** box. To search by Permanent ID, Student Number, or State Student ID, type or paste a list of numbers into the box. The numbers can be separated by spaces, commas, or line breaks.

Student Search: ?	99400001 99400002 99400003, 99400004
-------------------	---

Note: Entering students by number (ID, Student Number, or State Student ID) will NOT honor the **Include Inactive Students** option. All matching students will be returned regardless of inactive status. Every other search method does honor this option, though.

Search By Teacher/Counselor

Students can also be selected based on their teacher assignment. In schools with a master schedule, this will be counselor assignment instead. Click the magnifying glass icon to search for a teacher or counselor, then click the desired result.

623 - MONARCH	
Students	Monarch Search Close
Select students c	Teacher # Teacher Name
Selected Sh	623 Monarch
Search	Close All

Student Selection

Search by Class

In schools with a master schedule, you can also select students by class. Classes can be filtered by teacher, section, period, course, subject area, department, or room.

Filter By:	No Zero Period (0001)	9999 (1) Pd 4 Y - P
Teacher	Office Training (0210)	Aldrich (601) Pd 1 Y
Section	PE (0011)	Aldrich (601) Pd 1 Y
Period	PE 9 Test (0010)	Aldrich (601) Pd 2 Y
Course	Pep Units (0020)	Aldrich (601) Pd 2 Y
Subject Area	Personal Financ (0202)	Aldrich (601) Pd 3 Y
Department	Phys Science,CP (0674)	Aldrich (601) Pd 4 Y

Limit by Grade Level

Select a grade level from the **Grade Limit** drop-down to limit the student search. This limit applies to all the search methods described above (student, teacher/counselor, and class). If no grade level selection is made, student search results will include all grade levels. To select all students in a certain grade level, you can use the **Grade Limit** option and then click the **Load Students** button without entering any additional search criteria.

Search by Student Search by Counselor

Grade Limit: Not Selected

Student Search: ?

☐ Include Inactive Students

10

Student Selection

Load Students

After text has been entered into the **Student Search** box or a selection has been made using one of the other search methods, click the **Load Students** button. A list of students meeting the search criteria will be displayed.

The screenshot shows a web interface for selecting students. It is divided into two main panes: 'Search Results' on the left and 'Selected Students' on the right.

Search Results: At the top, it says 'Select students and click the right arrow to include them.' Below this are buttons for 'All' and 'None', and a 'Record Count: 548'. The main area is a table with columns: 'Select', 'Student Name', 'Sex', 'Grd', and 'Perm ID'. The table contains several rows of student data, each with a checkbox in the 'Select' column. A right-pointing arrow is visible between the two panes.

Selected Students: At the top, it says 'Select students and click the left arrow to remove them.' Below this is a 'Clear All' button and a 'Record Count: 0'.

Select	Student Name	Sex	Grd	Perm ID
<input type="checkbox"/>	Abdelnour, Alice	F	9	99400002
<input type="checkbox"/>	Abney, Jessica M	F	9	75500042
<input type="checkbox"/>	Aceves, Steven #	M	9	75500019
<input type="checkbox"/>	Acosta, Annessa G	F	9	99400018
<input type="checkbox"/>	AddTest, Shiplr20170110	M	9	75500046
<input type="checkbox"/>	Aguilar, Allon	M	9	99400030
<input type="checkbox"/>	Alegria, Alice L	F	9	99400043
<input type="checkbox"/>	Alejandro			

Select the check box next to each student you wish to include, or click the **All** button above the list to select all. Once the check boxes are selected, click the arrow pointing to the right to add the students to the **Selected Students** list.

To remove students that were erroneously selected, select the check box under the **Remove** column and click the arrow pointing to the left. You can also click the **Clear All** button to remove all students from this list.

The steps to search for and select students can be repeated as many times as needed until the **Selected Students** list contains all the students who should have a record added.

Mass Add Records

Mass Add Student Related Data

Mass Add Student Related Data

Create New Load Import

Target Table:

Students

Search by

Grade Limit

Student Section

ACR

ACT

ADH

ADS

AEF

AHD

AHS

ANL

Alternate Course Requests

Activities and Awards

Address History

Assertive Discipline

Adult Education Fields

Attendance History Detail

Attendance History Summary

Attendance Notification Log

Table: ACT

Field	Description	Value
TY	Type	<div>Award (2)</div>
CD	Code	<div>Golden State Seal Merit Diploma (GSS)</div>
NM	Name	<div></div>
DT	Date	<div>08/02/2021</div>
SD	Start Date	<div>01/04/2021</div>
ED	End Date	<div>06/18/2021</div>
HR	Hours	<div></div>
RS	Reason	<div></div>
SE	Season	<div>Spring (S)</div>

Mass Add Records

Mass Add Student Related Data

Mass Add Student Related Data

Create New

Load Import

Target Table:

Students

Search

Grade Limit

Student Sec

ACR

ACT

ADH

ADS

AEF

AHD

AHS

ANL

Alternate Course Requests

Activities and Awards

Address History

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SD	Start Date	<div>01/04/2021</div>
ED	End Date	<div>06/18/2021</div>
HR	Hours	<div></div>
RS	Reason	<div></div>
SE	Season	<div>Spring (S)</div>

Mass Add Records

Students to Update

☐ Search by Student ☐ Search by Teacher ☒ Search by Counselor

Grade Limit: Not Selected ▼

Counselor Search: 996055 X 996035 X X

☐ Include Inactive Students Load Students

Select students and click the right arrow to include them.

Search Results

All None Record Count: 4

Select	Student Name	Gender	Grd	Stu ID
<input type="checkbox"/>	Abbott, Alan A	M	6	99300001
<input type="checkbox"/>	Abbott, Alice A	F	8	99300002
<input type="checkbox"/>	Abdelsayed, Alice A	F	8	99300003
<input type="checkbox"/>	Abraham, Bernadette B	F	6	99300004

Select students and click the left arrow to remove them.

Selected Students

Clear All Record Count: 0

Once all selections have been made on the **Mass Add Student Related Data** page, click the **Mass Add Records** button at the bottom.

Add Records

Mass Add Records

Mass Add Records

This process may take some time to complete. You will receive an email when it has completed.

Mass Add Records

Email Notification

When the **Mass Add Student Related Data** process has completed, you will receive an email notification like the one shown below.

Mass Add Student Related Data

nowhere@aeries.com (nowhere@aeries.com) [Add contact](#)

To: nowhere@aeries.com;

The Mass Add Student Related Data process has been completed.
A total of 213 records were processed and 213 records were added to the FEE table.
There were no errors during the process.

School processed: 994

Table processed: FEE

Students processed:

99400043,99400103,99400107,99400108,99400132,99400140,99400188,99400193,99400194,9

If any errors occurred during the process, the email will indicate the number of errors and will also have a .csv file attached detailing each error. If this is the case, it is important to review the error list carefully as it may be necessary to clean up data and/or re-run the process.

It is HIGHLY recommended that you verify the expected results of the mass add process by spot-checking student records and/or running a query to locate the newly added records.



Thanks for joining us!

Where to Go [Aeries Support – Mass Add Student Related Data](#)

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more
upcoming
webinars!**

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- **Victims, Witness, Behavioral Emergency**
- **Reports**
- **Supplemental Attendance**
- **Intro to Analytics/LCAP Dashboards**
- **Attendance Refresher**



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[Good-Morning-Aeries-Survey](#)