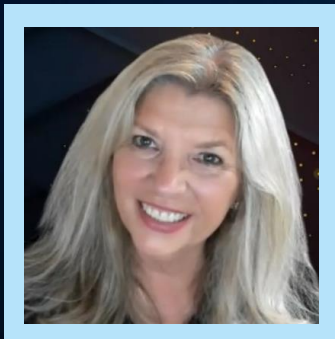




# Maximizing Data Input in Aeries

*Session 960*



**Susan Prow | Training and Documentation Specialist**

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# Agenda

1. Supportive Aeries Configurations
2. Excel List to KEEP Students
3. CHANGE Query – Populates Like Data Elements
4. Query Change – Populates Unique Data Elements
5. Mass Add Student Related Data
6. Import Data into Aeries – Spreadsheet Imports
7. Manual Entry



\* *Note: Many of the topics discussed in this session require appropriate permissions*



**AERIESCON**



# District Settings\*

**Aeries**  
Student Information System

Search students...

Pages Reports Favorites

Filter Pages...

Manager  
School of Choice Management  
Student Groups  
View Logged In Users  
Street Address Management  
Portal Management  
Configurations  
District Settings  
School Settings  
Student/Parent Alerts  
Configure Lunch Balance Notifications  
Configure Vaccination

District Settings	
<input type="checkbox"/>	Do NOT Optimize Graduation Status.
<input type="checkbox"/>	Process Courses for Graduation Status Calculation Chronologically.
<input checked="" type="checkbox"/>	Use New Career Pathways (CPW) tables instead of old "CTE Pathways (Perkins)" (CTE) table. Convert CTE to CPW
<input type="checkbox"/>	Automatically Generate Staff IDs.
<input type="checkbox"/>	Allow Transition Grade Reporting Mark Points.
<input checked="" type="checkbox"/>	Use Advanced Discipline (DIS) Page.
<input checked="" type="checkbox"/>	Show the Demerits field on the Assertive Discipline Page
5	Number of Offenses allowed (1-5) by Assertive Discipline record
<input type="checkbox"/>	Use Financials (Instead of Fees and Fines).
<input type="checkbox"/>	Disable School Based Attendance Letters
<input type="checkbox"/>	Enable ADA Weighting based on Attendance Program.
<input type="checkbox"/>	Hide the "Days with Truancies" total on the Student Attendance Page
<input type="checkbox"/>	Remove Attendance Fill Periods Option: "All day code will go in every period the student has classes".
<input checked="" type="checkbox"/>	Default State Reporting Field Highlighting to ON.
<input type="checkbox"/>	Do not display the STU.SN field in the system.

- Set Default State Reporting Field Highlighting to ON
- Highlights state reportable fields in **GREEN**
- If populated, data is reported to in state reportable extracts
- If not applicable, do not populate a field

\*  
permissions required



AERIESCON

# If It's Green, Don't Guess!



Student ID	Last Name	First Name	Middle Name	Suffix	Gender	Grd	Age	Birthdate
99000003	Aguilar	Jonathan	Daniel		Male	5	11	7/16/2012
Stu#	Last Alias	First Alias	Middle Alias	Birth Verif				Status
3								Active

Student Data 1

Student Data 2

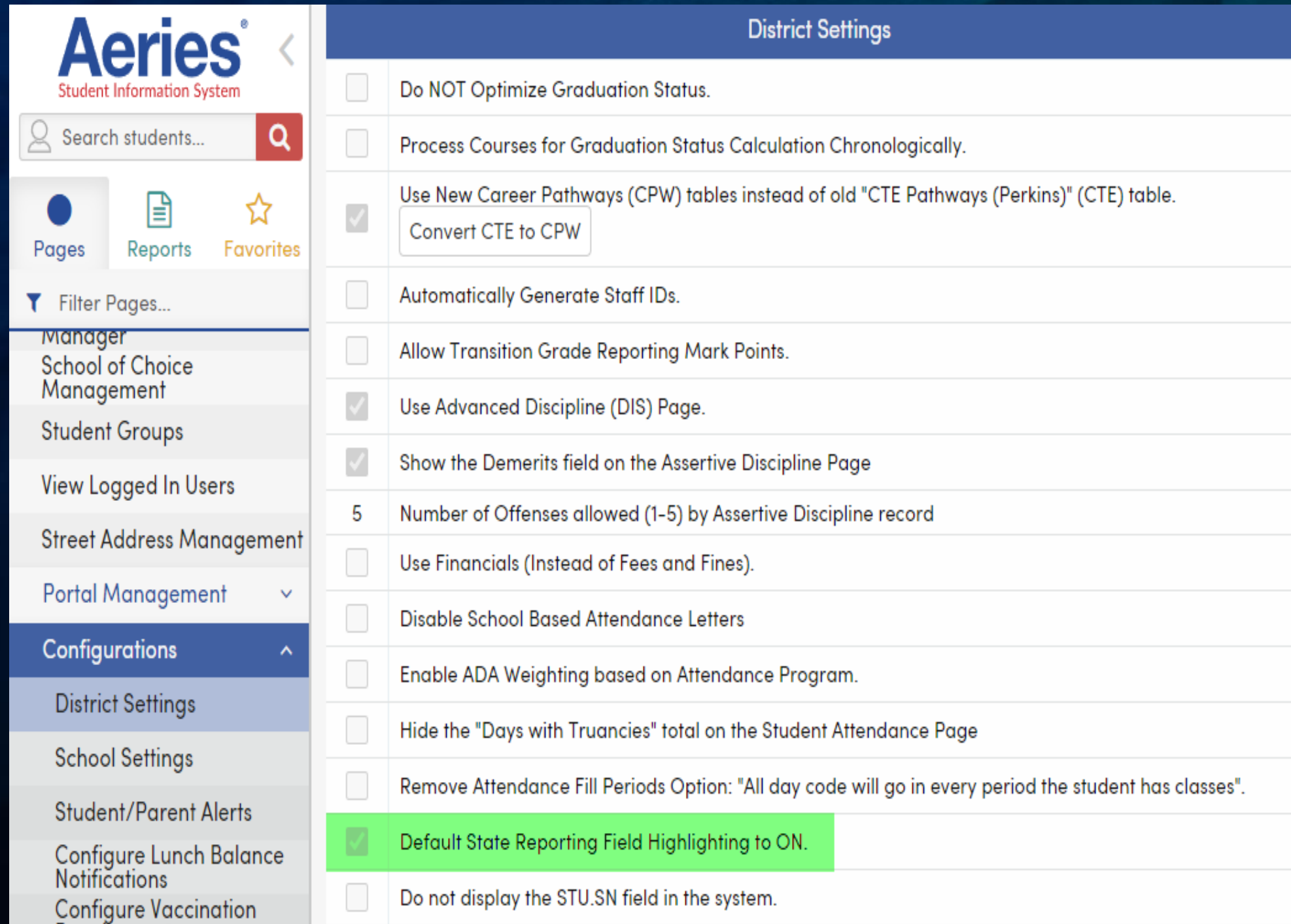
Residence and Mailing Address				Residence Address Status				
<div>Change Address</div>		33512 Lillyvale Ave Eagle Rock, CA 99999		Not Validated				
Grid Code	ResSchl	IntDist	ResDist	IntDist Exp Dt	Name Addr Ver			
0033E	Golden Eagle Elementary School (990)				8/28/2022			
Parent/Guardian		Telephone	Extn	Student Contact Info				
Name: M/M A Aguilar		Primary: (777) 555-7860		Student's Email: Jonathan.Aguilar@example.com				
Ed Lvl: High School Graduate (13)		Primary Contact 1:		Student's Mobile:				
		Primary Contact 2:		Notification Pref:				
Prog	Att Prg 1	Att Prg 2	US School Age 3 & Up	US School K-12	Dist Enter Dt	Schl Enter Dt	Schl Leave Dt	
Regular Program					8/10/2018	4/11/2020		
Primary Teacher(s)		Counselor	Locker	Records Release	Family Key			
990526 - Graybehl, Steve		0 - Unassigned			442	<div>Siblings</div>	<div>Sibling Lookup</div>	
Ethnicity	Race	CorrLng	RptgLng	LangFlu	Birth City	State	Country	US Schl < 3 yrs
Y		English	English	English Only (E)	Los Angeles	CA	US	



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# Define Required Fields\*



District Settings	
<input type="checkbox"/>	Do NOT Optimize Graduation Status.
<input type="checkbox"/>	Process Courses for Graduation Status Calculation Chronologically.
<input checked="" type="checkbox"/>	Use New Career Pathways (CPW) tables instead of old "CTE Pathways (Perkins)" (CTE) table. Convert CTE to CPW
<input type="checkbox"/>	Automatically Generate Staff IDs.
<input type="checkbox"/>	Allow Transition Grade Reporting Mark Points.
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5	Number of Offenses allowed (1-5) by Assertive Discipline record
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<input type="checkbox"/>	Enable ADA Weighting based on Attendance Program.
<input type="checkbox"/>	Hide the "Days with Truancies" total on the Student Attendance Page
<input type="checkbox"/>	Remove Attendance Fill Periods Option: "All day code will go in every period the student has classes".
<input checked="" type="checkbox"/>	Default State Reporting Field Highlighting to ON.
<input type="checkbox"/>	Do not display the STU.SN field in the system.

- Ensures mandated fields are populated
- Field displays in **BLUE** when in change/edit mode
- If all required fields are not populated, record entry does not **SAVE**
- Key Pages to Consider:
  - ✓ Demographics (STU)
  - ✓ Contacts (CON)
  - ✓ Assertive Discipline (ADS)
  - ✓ Staff (STF)

\*  
permissions required



**AERIESCON**

General	Additional Info	Expulsions	Victims	Witnesses	Other Violators	Behavioral Emergency Actions
Date:	10/10/2023	Exact Time:		Apprx:		School:
Incident ID:	29046	Referrer:	0	Substitute?	<input type="checkbox"/>	Location:
<div>Violations</div> <div>Pre-Referral Interventions</div>						
<div> <div>Possible Motivation</div> <div>Weapon Type</div> <div>Demerits</div> <div>Initials</div> <div>Tag</div> <div>Instructional Support</div> </div>						
<div> <div></div> <div>Not Applicable</div> <div>0.00</div> <div></div> <div></div> <div>Not Ap</div> </div>						
<div>Description of Incident</div> <div></div>						
<div>Short Description</div> <div></div>						
<div>Save Cancel</div>						

Blue highlighted fields are mandated





AutoSave Off PrintQueryToExcel\_202310

File Home Insert Page Layout Formulas Data Review View

Cut Copy Paste Format Painter

Arial 10 A A

B I U

Font

Align

H4

	A	B	C	D	E
	Student ID	Student Name	Grade	Birthdate	
1	99000003	Aguilar, Jonathan	5	07/16/2012	
2	99000006	Aguinaga, Valeria	6	04/24/2011	
3	99000007	Alavez, Abel	4	04/19/2013	
4	99000009	Albarran, David	0	11/10/2017	
5	99000010	Albright, Derek	5	11/19/2012	
6	99000740	Albright, Gunnar	-1	11/11/2018	
7	99000011	Albright, Jerod	2	09/28/2016	
8	99000012	Alcazar, Damien	4	06/03/2013	
9	99000013	Alfaro, Joshua	0	11/01/2018	
10	99000014	Allen, Alice	6	10/08/2011	
11	99000015	Allen, Sherry	3	03/23/2015	
12	99000016	Almaguer, Dominique	5	08/10/2012	
13	99000017	Alvarez, David	6	01/04/2011	
14	99000018	Alvarez, Haggit	4	02/08/2013	
15	99000019	Alvarez, Jasmine	5	08/12/2012	
16	99000020	Alvarez, Lauren	2	06/26/2016	
17	99000021	Alvarez, Tiffany	1	06/17/2017	
18	99000024	Amodo, Tyler	6	09/22/2011	
19	99000025	Amos, Jeannet	6	12/05/2012	
20	99000026	Anacostes, Lorena	0	03/13/2018	
21	99000027	Anagnostis, Mark	2	05/24/2016	
22	99000028	Anderson, Erik	6	12/06/2011	
23	99000029	Angelo, Ana	6	01/04/2011	
24	99000031	Anguiano, Tanya	2	03/08/2016	
25	99000032	Aparicio, Katharine	1	01/12/2017	
26	99000034	Aragones, Maryrose	1	11/13/2017	
27	99000035	Arce, Andrea	3	03/26/2015	
28					

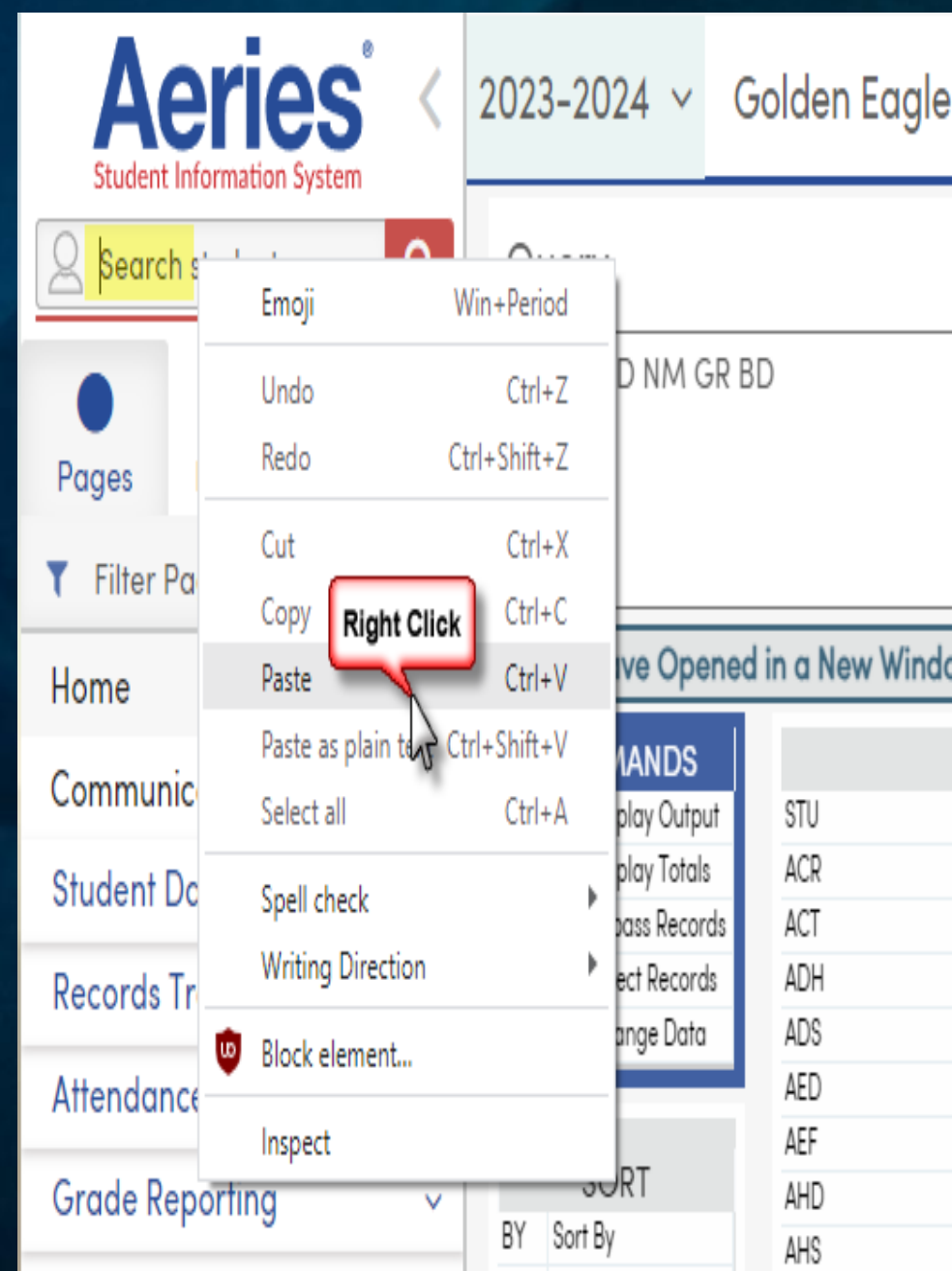
# Use Excel to KEEP Students

- Any spreadsheet can be used as a source to isolate and select specific students
- Using the **Search** tool, students are selected
- Use the **KEEP** command to select the students
- Once students are kept, scroll through to update data elements accordingly



	A	B	C	D
1	Student ID	Student Name	Grade	Birthdate
2	99000003	Aguilar, Jonathan	5	07/16/2012
3	99000006	Aguinaga, Valeria	6	04/24/2011
4	99000007	Alavez, Abel	4	04/19/2013
5	99000009	Albarran, David	0	11/10/2017
6	99000010	Albright, Derek	5	11/19/2012
7	99000740	Albright, Gunnar	-1	11/11/2018
8	990	Arial 9	2	09/28/2016
9	990	B I	4	06/03/2013
10	990		0	11/01/2018
11	99000014	Allen, Alice	6	10/08/2011
12	990		3	03/23/2015
13	990		5	08/10/2012
14	990		6	01/04/2011
15	990		4	02/08/2013
16	990		5	08/12/2012
17	990		2	06/26/2016
18	990		1	06/17/2017
19	990		6	09/22/2011
20	990		6	12/05/2012
21	990		0	03/13/2018
22	990		2	05/24/2016

Select Student IDs (STU.ID)  
Right Click to copy



Navigate to **Search**  
Right Click to Paste  
Click **Search Tool**

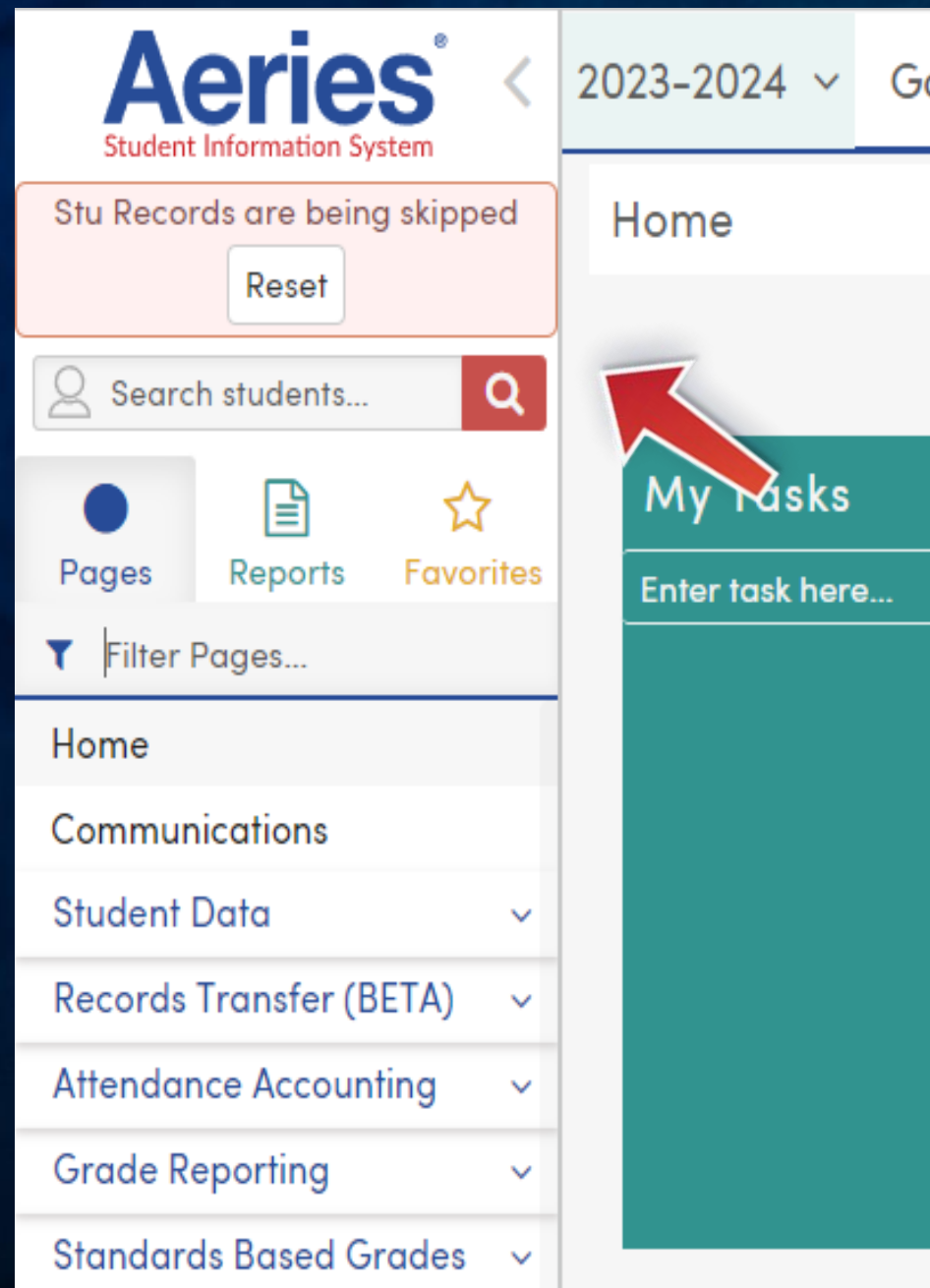
Group: No Group Selected Keep and List Group			
99000019 99000020			Search
16 Results			Keep Students
Stu ID	StuNum	Status	Birthdate
99000003	3	Active	7/16/2012
99000006	6	Active	4/24/2011
99000007	7	Active	4/19/2013
99000009	9	Active	11/10/2017
99000010	10	Active	11/19/2012
99000011	11	Active	9/28/2016

Click **Keep Students**

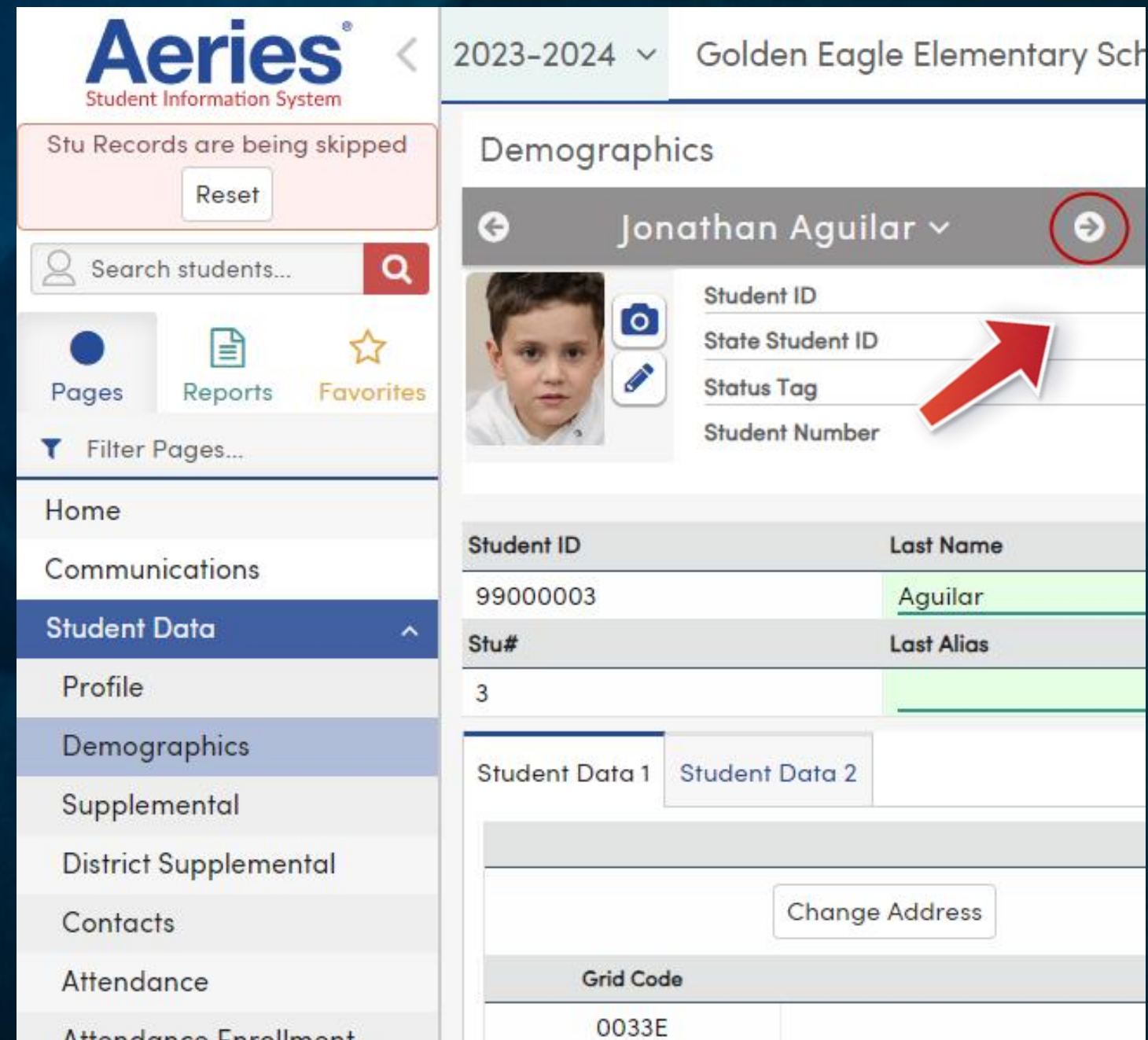


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Note: Stu Records are being skipped - Equivalent to a KEEP query



Scroll through to update students



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**Aeries** Student Information System

2023-2024 Golden Eagle Elementary School

Stu Records are being skipped  
Reset

Search students...

Pages Reports Favorites

Filter Pages...

Home

Communications

Student Data

Records Transfer (BETA)

Attendance Accounting

Grade Reporting

Standards Based Grades

Supplemental Attendance

Scheduling Process

School Info

Aeries Analytics

Financials

Service Learning

District Assets

Teacher Emulation

View All Reports

View All Forms

Query

CHANGE STU LF TO T

Enter more field code(s), or BY, or IF or RUN QUERY

Include Inactive Students

COMMANDS

LIST Display Output

TOTAL Display Totals

SKIP Bypass Records

KEEP Select Records

CHANGE Change Data

SORT

BY Sort By

Reverse Sort

FILTER

IF

OR AND

( )

COMPARISON

= Equals

# Not Equal

> Greater Than

>= Greater or Equal

< Less Than

<= Less or Equal

: Contains

; Not Contains

TABLES

STU Student Data

ACR Alternate Course Requests

ACT Activities and Awards

ADH Address History

ADS Assertive Discipline

AED Adult Education

AEF Adult Education Fields

AHD Attendance History Detail

AHS Attendance History Summary

ANL Attendance Notification Log

APC Academic Plan Course Requests

APL Academic Plan Log

ARD ARD

ARH ARH

ARI Student At-Risk Indicators

ARR ARR

ARS ARS

ATA Supp Att Assignments

ATD Supp Att Data

ATN Attendance Notes

ATT Attendance Data

AUT Authorizations, Prohibitions, and Waivers

BER Behavioral Emergency Report

EXTENDED FIELDS

5PERCPROJECTS 5% Projects

504\_PRG 504 Accommodation Plan

504\_PLAN 504 Students

AG\_READINESS A/G Readiness (12th Graders)

ACT\_COMPOSITE ACT Composite

FAMILY\_LIFE Adolescent Family Life Program

SPECIAL

? Description

STU.NM Full Name

STU.MI Middle Initial

\ New Line

BARCODE Barcode

.DAY Day Value

.MONTH Month Value

.YEAR Year Value

.YEARS # Years Ago (Age)

.VALUE of an Extended Field

.LEVEL of an Extended Field

MATH

(( Start Math

) Stop Math

( Open Parenth

) Close Parenth

+ Add

- Sub

\* Mult

/ Div

Keep/Skip History

Aeries

Analytics

Kept

Students

UNDO LAST KEEP/SKIP

New

Run

Excel

Report

Labels

Letters

Letter Editor

Envelope

Change

Save

Load

Reset

Excel (old)

Show SQL

Db Defs

# Use a CHANGE Query\*

- A CHANGE Query will update a data element using the same value for all/selected students
- A CHANGE Query honors the KEEP
- Example of a CHANGE Query:  
CHANGE STU LF TO T  
changes all STU.LF to TBD
- Click Run
- Note:** Change queries change all data within the query on one click, use caution and test in a Sandbox environment!
- See Sessions: 255, 250, 260, 265, 270, 272

\* permissions required



AERIESCON



# Use Query CHANGE\*



2023-2024 ▾ Golden Eagle Elementary School ▾

Query

LIST STU ID NM BCY BST BCU

Query Results - Google Chrome

training2.aeries.net/SP/Aeries/QueryDisplayBasic.aspx

Student ID	Student Name	Birth City	Birth State	Birth Country
99000003	Aguilar, Jonathan	Los Angeles	CA	US
99000006	Aguinaga, Valeria	Allentown	PA	US
99000007	Alavez, Abel	Twenty Nine Palms, CA		
99000009	Albarran, David			
99000010	Albright, Derek	Long Beach CA		
99000740	Albright, Gunnar			
99000011	Albright, Jerod	Granada Hills CA		
99000012	Alcazar, Damien	Ft Collins CO		
99000013	Alfaro, Joshua	Long Beach CA		

PEECIAL  
Description  
Full Name  
Middle Initial  
New Line  
Barcode  
Day Value  
Month Value  
Year Value  
# Years Ago (Age)  
of an Extended Field  
of an Extended Field

MATH  
Math  
Math  
Parent  
Parent

New  
Run  
Excel  
Report  
Labels  
Letters  
Letter Editor  
Envelope  
Change  
Save  
Load  
Reset  
Excel (old)  
Show SQL  
Db Defs

- A query is run with various fields for students
- Query CHANGE mode displays the fields in edit mode
- Multiple students can be updated in a spreadsheet view – each with a unique value
- Example of a Query CHANGE to updated missing Birth City, Birth State, or Birth Country:  

LIST STU ID NM BCY BST BCU

lists student ID, Name, Birth City, Birth State, and Birth Country
- **Run Query**
- Then click **Change** to populate values
- **Note:** Query change allows the user to input the missing data
- See Sessions: 255, 250, 260, 265, 270, 272

\*  
permissions required



AERIESCON

Student ID	Student Name	Birth City	Birth State	Birth Country
99000003	Aguilar, Jonathan	Los Angeles	CA-California	US-United Stat
99000006	Aguinaga, Valeria	Allentown	PA-Pennsylvan	US-United Stat
99000007	Alavez, Abel	Twenty Nine Palms, CA		-
99000009	Albarran, David			-
99000010	Albright, Derek	Long Beach CA		-
99000740	Albright, Gunnar			-
99000011				
99000012				
99000013	Alfaro, Joshua	Long Beach CA		-
99000014	Allen, Alice	Van Nuys CA		-
99000015	Allen, Sherry	Granada Hills CA		-
99000016	Almaguer, Dominique	West Hills CA		-
99000017	Alvarez, David	Van Nuys CA		-
99000018	Alvarez, Haggit	Inglewood CA		-
99000019	Alvarez, Jasmine	Los Angeles	CA-California	US-United Stat
99000020	Alvarez, Lauren	Los Angeles CA		-

**Fields can now be individually populated**





# Mass Add Student Related Data\*

**Aeries**  
Student Information System

2023-2024 Golden Eagle Elementary School

Search students...

Pages Reports Favorites

Filter Pages...

Configurations

Functions

- Administrative Functions
- Backup Gradebooks
- Calculate College Entrance Reqs
- Combine Student Records
- Copy Many Student Records
- Create Multi Track Calendar
- Create Pre-Enrolled Students
- Language Assessment Management
- Mass Add Student Related Data**
- Mass Add Pictures
- Mass Assign Family Keys
- Mass Change Area Codes
- Mass Copy Gradebooks
- Mass Create Gradebooks
- Mass Set Grade Fields
- Mass Update Graduation Status
- New Year Rollover
- Physical Fitness Test Management

Data Validation

Imports and Exports

### Mass Add Student Related Data

Create New Load Import

### 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.

**Search Results**

All None Record Count:

Select students and click the left arrow to remove them.

**Selected Students**

Clear All Record Count: 0

### Add Records

Mass Add Records

- Any “student” related table can be populated
- Once table is selected, displays all related fields
- Several methods of selecting students
- Use Templates for repetitive processes

\*  
permissions required



AERIESCON

Mass Add Student Related Data

Mass Add Student Related Data

Create New Load Import

Import Name:

Students to Update

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

Grade Limit: Not Selected

Student Search:

☐ Include Inactive Students Load Students

Determine type of import: **Create New**  
or **Load Import** (existing “template”)

Students to Update

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

Grade Limit: Not Selected

Student Search:

☐ Include Inactive Students Load Students

Search by Student, Counselor or Class  
Search by Grade Level(s)  
Search by Student Name  
Honors KEEP/SKIP Statement  
Include Inactive Students?  
Click **Load Students** after each selection

Students to Update

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

Grade Limit: 2

Student Search:

☐ Include Inactive Students Load Students

Select students and click the right arrow to include them.

**Search Results**

☒ All ☐ None Record Count: 92

Select	Student Name	Gender	Grd	Stu ID
<input type="checkbox"/>	Albright, Jerod C	M	2	99000011
<input type="checkbox"/>	Alvarez, Lauren E	F	2	99000020
<input type="checkbox"/>	Anagnostis, Mark M	M	2	99000027
<input type="checkbox"/>	Anguiano, Tanya R	F	2	99000031
<input type="checkbox"/>	Arevalo, David J	M	2	99000037
<input type="checkbox"/>	Baker, Michael A	M	2	99000057
<input type="checkbox"/>	Balanzategui, Olivia S	F	2	99000060
<input type="checkbox"/>	Bandalaria, Kelcie S	F	2	99000062

Select students and click the left arrow to remove them.

**Selected Students**

Clear All Record Count: 0

Example above:  
Grade 2 students selected  
Click **Load Students**  
Select Students individually or click **All**  
Click **Arrow** to place in **Selected Students** section



Mass Add Student Related Data

Mass Add Student Related Data

Create New Load Import

Import Name:

Students to Update

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

Grade Limit: Not Selected

Student Search:

☐ Include Inactive Students Load Students

Table: PGM

Field	Description	Value
CD	Prgm Code	NCLB Title I Part A Basic Targeted (122)
ESD	Elg Start Dt	
EED	Elg End Dt	
PSD	Start Dt	09/18/2023
PED	End Dt	06/07/2024
ER	Exit Rsn	Not Applicable
OP	Outcome	
IS	Setting	
CO	Comment	
YP	YrsInPgm	
HR	Hours	
TT	Training Type	Not Applicable
ARI	AuthReleaseInfo	Not Applicable
DS	Disadv Status	
ST	Status	Not Applicable
EG	EnterGrade	
SCL	School	
MP	MgntProg	
CPA	CAPartAcad	
HDT	Homeless Dwelling Type	
RA	Runaway	
UY	Unaccompanied Youth	Not Applicable
TY	Program Type	
DTS	Date Timestamp	

Reset Save Layout Delete Layout

Students to Update

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

Grade Limit: Not Selected

Student Search:

☐ Include Inactive Students Load Students

Determine type of import: **Create New** or **Load Import** (existing “template”)

Populate Table Fields , as needed  
Options located at the bottom include:

- **Reset Data**
- **Save Layout**
- **Delete Layout**

Example displays:  
Mass add of NCLB Title 1 Part A Basic Targeted (PGM.CD = 122)

Search by Student, Counselor or Class  
Search by Grade Level(s)  
Search by Student Name  
Honors KEEP/SKIP Statement  
Include Inactive Students?  
Click **Load Students** after each selection

Students to Update

Search by Student

Search by Counselor

Search by Class

Grade Limit:

2

Student Search: ?

Load Students

Select students and click the right arrow to include them.

Select students and click the left arrow to remove them.

Search Results

AllNone

Record Count: 92

Selected Students

Clear All

Record Count: 0

Select	Student Name	Gender	Grd	Stu ID
<input type="checkbox"/>	Albright, Jerod C	M	2	99000011
<input type="checkbox"/>	Alvarez, Lauren E	F	2	99000020
<input type="checkbox"/>	Anagnostis, Mark M	M	2	99000027
<input type="checkbox"/>	Anguiano, Tanya R	F	2	99000031
<input type="checkbox"/>	Arevalo, David J	M	2	99000037
<input type="checkbox"/>	Baker, Michael A	M	2	99000057
<input type="checkbox"/>	Balanzategui, Olivia S	F	2	99000060
<input type="checkbox"/>	Bandalaria, Kelcie S	F	2	99000062

Select students and click the right arrow to include them.

Select students and click the left arrow to remove them.

Search Results

AllNone

Record Count: 92

Selected Students

Clear All

Record Count: 92

Select	Student Name	Gender	Grd	Stu ID
<input type="checkbox"/>	Albright, Jerod C	M	2	99000011
<input type="checkbox"/>	Alvarez, Lauren E	F	2	99000022
<input type="checkbox"/>	Anagnostis, Mark M	M	2	99000022
<input type="checkbox"/>	Anguiano, Tanya R	F	2	99000033
<input type="checkbox"/>	Arevalo, David J	M	2	99000033
<input type="checkbox"/>	Baker, Michael A	M	2	99000055
<input type="checkbox"/>	Balanzategui, Olivia S	F	2	99000066
<input type="checkbox"/>	Bandalaria,	F	2	99000066

Remove	Student Name	Gender	Grd	Stu ID
<input type="checkbox"/>	Albright, Jerod C	M	2	99000011
<input type="checkbox"/>	Alvarez, Lauren E	F	2	99000022
<input type="checkbox"/>	Anagnostis, Mark M	M	2	99000022
<input type="checkbox"/>	Anguiano, Tanya R	F	2	99000033
<input type="checkbox"/>	Arevalo, David J	M	2	99000033
<input type="checkbox"/>	Baker, Michael A	M	2	99000055
<input type="checkbox"/>	Balanzategui, Olivia S	F	2	99000066
<input type="checkbox"/>	Bandalaria,	F	2	99000066

Add Records

Mass Add Records



Example above:  
Grade 2 students selected  
Click **Load Students**  
Select Students individually or click **All**  
Click **Arrow** to place in **Selected Students** section

Special Programs

Lauren Alvarez

General

Contact

Add'l Info

Flags 1

Programs 4

User Codes

Student ID

99000020

State Student ID

9900000020

Status Tag

Active

Student Number

20

Grade

2

Age

7

Gender

Female

Birthdate

6/26/2016

Primary Teacher(s)

Cook, Carolyn

Counselor

Language Fluency

English Learner

CorrLng / RptgLng

Spanish / Spanish

Interdistrict Status

Filters and Options

Programs

Start Date


End Date

Filter

Current Programs

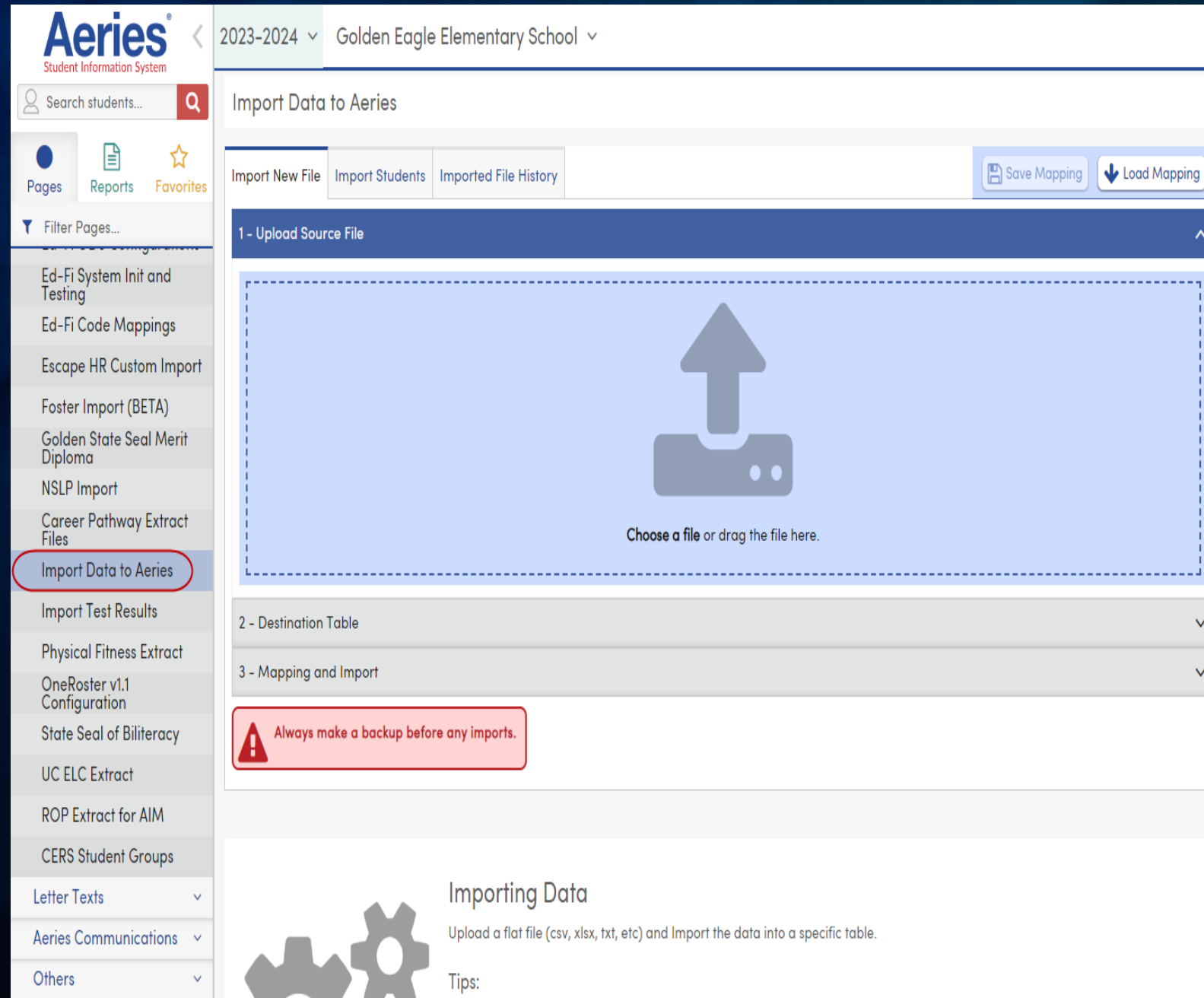
NCLB Title I Part A Basic Targeted (122)

Participate: 9/18/2023 - 6/7/2024

**AERIESCON**



# Import Data Into Aeries\*



- Imports a spreadsheet into a Table
- Spreadsheet is mapped to fields within the table
- Appends, Inserts and/or Skips Records
- Template option available

\*  
permissions required



AERIESCON

AutoSave Off Import Data Gr 3 for Conference • Saved

File Home Insert Page Layout Formulas Data Review View

Paste Font Alignment

E90

	A	B	C	D
	Student ID	City	State	Birth Country
2	99000015	Granada Hills	CA	US
3	99000035	Los Angeles	CA	US
4	99000038	Northridge	CA	US
5	99000043	Fontana	CA	US
6	99000066	Los Angeles	CA	US
7	99000068	Burbank	CA	US
8	99000083	Sun Valley	CA	US
9	99000092	Panorama City	CA	US
10	99000100	Los Angeles	CA	US
11	99000111	Houston	TX	US
12	99000114	Burbank	CA	US
13	99000116	Los Angeles	CA	US
14	99000122	Mission Hills	CA	US
15	99000133	Sylmar	CA	US
16	99000137	Sacto	CA	US
17	99000149	Missouri	CA	US
18	99000152	Los Angeles	CA	US
19	99000157	Arleta	CA	US
20	99000161	Panorama City	CA	US
21	99000168	Tarzana	CA	US
22	99000181	Provo	UT	US

Sample spreadsheet to update Birth City, Birth State, and Birth Country

### Import Data to Aeries

Import New File Import Students Imported File History

Save Mapping Load Mapping

#### 1 - Upload Source File

Drag and Drop

Choose a file or drop

#### 2 - Destination Table

#### 3 - Mapping and Import

Always make a backup before any imports.

Use Drag and Drop to add the spreadsheet to import



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Import Data to Aeries

Import New File

Import Students

Imported File History

Save Mapping

Load Mapping

1 - Upload Source File

Import Data Gr 3 for Conference.xlsx

Import Data Gr 3 for Conference.xlsx File Selected. Click or drag a file here to change.

File Preview

☒ First Row contains headers

Next >

Student ID	City	State	Birth Country
99000015	Granada Hills	CA	US
99000035	Los Angeles	CA	US
99000038	Northridge	CA	US
99000043	Fontana	CA	US
99000066	Los Angeles	CA	US
99000068	Burbank	CA	US
99000083	Sun Valley	CA	US
99000092	Panorama City	CA	US

1

2

3

4

5

6

7

8

9

10

1 - 10 of 91 items

Indicate if spreadsheet has a header row  
Click **Next**

2 - Destination Table

Table	Description
ACR	Show items with value that: (Query Only)
ACT	Is equal to
ADH	STU
ADS	<div>FilterClear</div>
AED	Adult Education
AEF	Adult Education Fields (Query Only)

Select Table  
Use Filter, if desired  
Click **Filter**

3 - Mapping and Import

STU Table FieldsStudent Data

Aeries Field Name	Source Column From File	Is Primary	Description	Data Type	Nullable	Issues
SC	<div><input checked="" type="checkbox"/> Map SC by this STU.ID: Student ID</div>	yes	School	smallint (32,767)	no	
SN	<div><input checked="" type="checkbox"/> Map SN by this STU.ID: Student ID</div>	yes	Student#	int (2,147,483,648)	no	
LN		no	Last Name	nvarchar (100)	no	
FN		no	First Name	nvarchar (100)	no	
MN		no	Middle Name	nvarchar (100)	no	
ID		no	Student ID	int (2,147,483,648)	no	
SX		no	Sex	varchar (1)	no	
GR	<div><input checked="" type="checkbox"/> Use STU.GR: Current STU.GR</div>	no	Grade	smallint (32,767)	no	- Not Included -
BD		no	Birthdate	datetime (8)	yes	

Map Fields  
Primary Keys Must Be Mapped  
Use Current STU.GR, if applicable



Import Options

On Primary Key Match

STU Table is Update Only.☐ Ignore Primary Key Errors

Import

☒ Inactive Students☒ Inactive Schools

Import 91 Rows

!

Always make a backup before any imports.

Import Data to Aeries

Import New File

Import Students

Imported File History

Import History

Table	Date Imported	User	Options	Errored	Inserted	Updated	Skipped	Total Rows
STU	12/15/2023 12:00 AM	admin	PK Skip	89	0	0	0	89
STU	10/10/2023 4:20 PM	admin	PK Skip	0	0	91	0	91
STU	10/10/2023 4:17 PM	admin	PK Skip	0	0	0	0	91

As a precaution, run the import process in a Sandbox environment to ensure expected results

Note **Import File History** tab  
Click the numeric value in the Updated column to view results



Import [STU] at 10/10/2023 4:20:12 PM - Updated Details

SQ	Status	Error Message	New SQ	New Data	Old Data
1	Updated			<pre>[[   SC (Mapped): "99000015",   SN (Mapped): "99000015",   BCY: "Granada Hills",   BST: "CA",   BCU: "US" ]]</pre>	<pre>[[   SC:990,   SN:15,   LN: "Allen",   FN: "Sherry",   MN: "Amber",   ID:99000015,   SX: "F", ]]</pre>
2	Updated			<pre>[[   SC (Mapped): "99000035",   SN (Mapped): "99000035",   BCY: "Los Angeles",   BST: "CA",   BCU: "US" ]]</pre>	<pre>[[   SC:990,   SN:35,   LN: "Arce",   FN: "Andrea",   MN: "Brittany",   ID:99000035,   SX: "F", ]]</pre>
3	Updated			<pre>[[   SC (Mapped): "99000038",   SN (Mapped): "99000038",   BCY: "Northridge",   BST: "CA",   BCU: "US" ]]</pre>	<pre>[[   SC:990,   SN:38,   LN: "Argueta",   FN: "Craig",   MN: "Carlos",   ID:99000038, ]]</pre>

1 items

Export List to Excel Close

Results display New Data updates  
[Export List to Excel](#) to view in a spreadsheet



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# And... there's always **Manual** **Entry**

---

- 1 Sometimes – it's easier
- 2 Just a few students
- 3 Path of least resistance





# Key Takeaways

- There's many ways to manage data entry in Aeries
- Aeries has several mass-update options
- The right option depends upon common fields, volume of changes, and permissions
- Mass update processes should be tested in a sandbox environment to ensure expected results



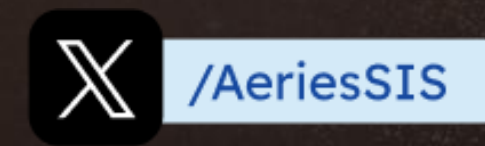
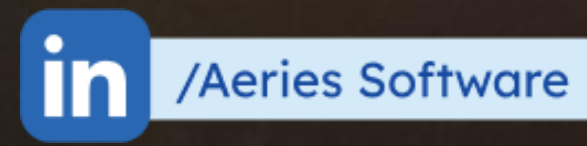
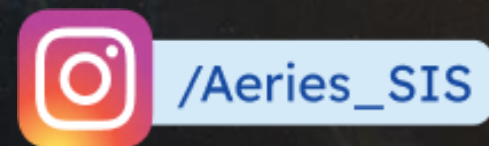
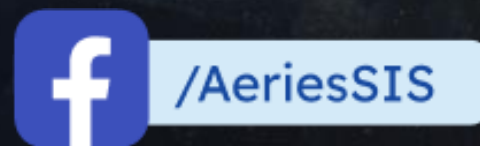
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# THANK YOU!

*Please take a moment to complete our session survey.*

*<http://surveys.aeries.com/s3/AeriesCon-Session-Feedback-Survey-Spring-2024>*



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# Share your Feedback:



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