



This documentation refers to an old version of Accudemia 7.0 and has been replaced by Accudemia 9.0:

[Accudemia 9.0 - Imports & Exports](#)

[Prev.: Outlook 365 Integration](#) | [Table of Contents](#) | [Next Article - Administration: Advanced - Control Panel](#)

Importing & Exporting Data- Accudemia Data eXchange (ADX)

New to Accudemia? Would you like some help determining the best imports needed for Accudemia? [Click here](#) to choose using our Import Selection Guide.

Download our Import Tool(ADX)

Use ADX Accudemia Data Exchange to upload your college data into the system. To start, you need to download **ADX** while logged into Accudemia under **Advanced > Import**

You will need to have an Administrative account in Accudemia with at minimum the permissions to “Import Data” or “Export Data”; this is to be able to download the import utility and run the imports. Talk to an Accudemia administrator if you have questions

If you are an administrator typically would like to create an account for your I.T team so they can use it for import purposes. Learn how to do it here: [click here](#) to learn how.

System Requirements & Installing ADX

For help on installing ADX and verifying the system requirements for the import/export tool, please [read this](#).

How to backup your ADX config

For help on backing up or moving the ADX configurations around from one computer to another or one Windows user account to another, please [read this](#).

Data Formatting

Accudemia offers a flexible and powerful import utility that allows you to import files with the fields and column order you like. The step-by-step import process will allow you to map your columns, thus bypassing the need for separate Import Maps. The import utility, called **ADX (Accudemia Data Exchange)**, can even schedule the import job so it would run automatically in the future.

ADX allows you to import data in several ways. You are free to select the way most convenient to you:

1. **Import from a single file:** Most commonly obtained through another systems export(data dump) that includes all the student, classes, and registration data in it.
2. **Import via separate files:** Multiple individual files with specific items like Student data import, class import, class registration import, and others.
3. **Do Incremental Import files:** Instead of having a big file with ALL data these CSV data files would only have the latest updates so all these data would be appended/added to what is currently in Accudemia.
4. **Use a Comprehensive Import file:** This kind of file stores the entire data set.

The import is usually done via a standard CSV (Comma Separated Values) text file. However, ADX can also be extended by the user to support other formats, including a direct connection to your student registration system.

To get started, we have prepared some sample import files with possible headers in them. Note that these are only examples, and your import files could have different fields and/or field orders.

Imports and Available Fields with Explanations

This next section provides you with all of the different types of import files with field explanations. If you are having trouble deciding what imports to use, please check out this import selection guide by clicking [here](#). There will be links to return once you make your selections.

User Imports

These imports are needed to create your different types of **Users** in their **Predefined Roles** (Students, Tutors, or Instructors). **System Users** such as **College Administrators** and **Center Administrators** must be created manually in the system and cannot be imported for security reasons. If the ID number matches someone already imported or created in another **Security Role**, then it will simply add the new **Role** to their **Security Roles** making that user a hybrid (like peer-tutors that are usually both students and tutors). More information about managing **Users** and their **Security Roles** can be found here:

User Accounts

Before importing any users, you'll want to first log in as an Administrator to the institution's website <https://<mycollege>.accudemia.net> account and set up an ID Format/Mask ID that will be used to filter that the IDs coming to Accudemia are correct (in case an ID does not match the requirements the import might fail). Here is more information on how to set the ID format:

Setting up the ID format

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; } .accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; } .active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ } .note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; } .tg {border-collapse: collapse; border-spacing: 0; } .tg td {font-family: Arial, sans-serif; font-size: 14px; padding: 10px 5px; border-style: solid; border-width: 1px; overflow: hidden; word-break: normal; border-color: black; } .tg th {font-family: Arial, sans-serif; font-size: 14px; font-weight: bold; padding: 10px 5px; border-style: solid; border-width: 1px; overflow: hidden; word-break: normal; border-color: black; } .tg .tg-header {font-weight: bold; background-color: #dae8fc; border-color: inherit; text-align: left; vertical-align: top; } .tg .tg-gray {background-color: #efefef; border-color: inherit; text-align: left; vertical-align: top; } .tg .tg-white {border-color: inherit; text-align: left; vertical-align: top; } .tg .tg-footer {border-style: solid hidden hidden hidden; font-weight: bold; font-style: italic; border-color: inherit; text-align: left; vertical-align: top; }
Student Import
```

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Students	Student's User ID	Required	Student Primary Key
Users > Students	Student's First Name	Required	
Users > Students	Student's Last Name	Required	
Users > Students	Student's Active	Optional ?	
Users > Students	Student's Email	Optional !	
Users > Students	Student's Phone Number	Optional	
Users > Students	Student's Alternate ID	Optional *	
Users > Students	Student's Password	Optional *	
Users > Students	Student's Other ID 1	Optional +	
Users > Students	Student's Other ID 2	Optional +	
Users > Students	Student's Other ID 3	Optional +	
Users > Students	Student's Other ID 4	Optional +	

Users > Students	Student's Middle Name	Optional
Users > Students	Student's Address	Optional
Users > Students	Student's City	Optional
Users > Students	Student's State	Optional
Users > Students	Student's Zip Code	Optional
Users > Students	Student's Comments	Optional
Users > Students	Student's Photo	Optional

? The Active column is not required but is used to reactivate inactivated students if using the "inactivate" option in the import behaviors section of the import job.

! Email is not required but is used heavily if Centers will be offering appointments. This can also be used for general communications.

* Can be used to store their SSO username or LDAP information used in SAML/OATH2.

+ Can be used for a Card Number.

Tutor Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Tutors	Tutor's User ID	Required	Tutor Primary Key
Users > Tutors	Tutor's First Name	Required	
Users > Tutors	Tutor's Last Name	Required	
Users > Tutors	Tutor's Active	Optional	
Users > Tutors	Tutor's Email	Optional !	
Users > Tutors	Tutor's Phone Number	Optional	
Users > Tutors	Tutor's Alternate ID	Optional *	
Users > Tutors	Tutor's Password	Optional *	
Users > Tutors	Tutor's Address	Optional	
Users > Tutors	Tutor's City	Optional	
Users > Tutors	Tutor's State	Optional	
Users > Tutors	Tutor's Zip Code	Optional	
Users > Tutors	Tutor's Comments	Optional	
Users > Tutors	Tutor's IsRelatedToAllCourses	Optional	
Users > Tutors	Tutor's Active	Optional	
Users > Tutors	Tutor's Photo	Optional	

! Email is not required but is used heavily if Centers will be offering appointments. This can also be used for general communications.

* Can be used for a Card Number or be used to store their LDAP information.

Instructor Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
-----------------	-----------------	-----------------------	-----------

Users > Instructors	Instructor's User ID	Required	Instructor Primary Key
Users > Instructors	Instructor's First Name	Required	
Users > Instructors	Instructor's Last Name	Required	
Users > Instructors	Instructor's Active	Optional	
Users > Instructors	Instructor's Email	Optional !	
Users > Instructors	Instructor's Phone Number	Optional	
Users > Instructors	Instructor's Alternate ID	Optional *	
Users > Instructors	Instructor's Password	Optional *	
Users > Instructors	Instructor's Address	Optional	
Users > Instructors	Instructor's City	Optional	
Users > Instructors	Instructor's State	Optional	
Users > Instructors	Instructor's Zip Code	Optional	
Users > Instructors	Instructor's Comments	Optional	
Users > Instructors	Instructor's IsRelatedToAllCourses	Optional	
Users > Instructors	Instructor's Active	Optional	
Users > Instructors	Instructor's Photo	Optional	

! Email is not required but is used heavily if Centers will be sending Reports to Instructors. This can also be used for general communications.

* Can be used for a Card Number or be used to store their LDAP information.

Location Imports

Typically these imports are considered optional because of the ease it is to manage/create this information within the Accademia interface. With that stated, you can import them and assign courses to the Centers through imports if you prefer.

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; }
.accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; }
.active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ }
.note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; }
.tg {border-collapse:collapse;border-spacing:0;}
.tg td{font-family:Arial, sans-serif;font-size:14px;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;}
.tg th{font-family:Arial, sans-serif;font-size:14px;font-weight:bold;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;}
.tg .tg-header{font-weight:bold;background-color:#dae8fc;border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-gray{background-color:#efefef;border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-white{border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-footer{border-style:solid hidden hidden hidden;font-weight:bold;font-style:italic;border-color:inherit;text-align:left;vertical-align:top}
Center Import
```

Accademia Table	Accademia Field	Required for Creation	Key Field
-----------------	-----------------	-----------------------	-----------

Centers & Classrooms Center's name	Required	Center Primary Key
Centers & Classrooms Center's Active	Optional	
Centers & Classrooms Center's All Courses Available	Optional	

Classroom Import

Accademia Table	Accademia Field	Required for Creation	Key Field
Centers & Classrooms Classroom's name	Required		Classroom Primary Key
Centers & Classrooms Classroom's Active	Optional		

Center Assignment Import

Accademia Table	Accademia Field	Required for Creation	Key Field
Centers & Classrooms Center's name	Required		Center Primary Key
Subject Areas Subject Area's name	Required		Subject Area Primary Key
Subject Areas Subject Area Prefix	Required		Secondary Key when combined with Subject Area Code
Subject Areas Subject Area Code	Required		Secondary Key when combined with Subject Area Prefix

Subject Area (Courses) and Class Imports

In this next section, we are building the **Subject Areas (Courses)** along with the **Class** information for the **Students** to be enrolled in or registered to, tutors to be assigned in, and/or **Instructors (Faculty)** to be assigned in **Accademia**.

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; }
.accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; }
.active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ }
.note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; }
.tg {border-collapse:collapse;border-spacing:0;}
.tg td{font-family:Arial, sans-serif;font-size:14px;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;}
.tg th{font-family:Arial, sans-serif;font-size:14px;font-weight:bold;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;}
.tg .tg-header{font-weight:bold;background-color:#dae8fc;border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-gray{background-color:#efefef;border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-white{border-color:inherit;text-align:left;vertical-align:top}
.tg .tg-footer{border-style:solid hidden hidden hidden;font-weight:bold;font-style:italic;border-color:inherit;text-align:left;vertical-align:top}
Course and Class Import with Instructor Assignments
```

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Subject Areas	Subject Area's name	Required	Subject Area Primary Key
Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code
Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix (or section number)	Required	Class Tertiary Key
Classes	Class Other	Optional	
Users > Instructors	Instructor's User ID	Required	Instructor Primary Key
Users > Instructors	Instructor's First Name	Required	
Users > Instructors	Instructor's Last Name	Required	
Terms	Term's Name	Required ?	Term Primary Key
Terms	Term's Start Date	Required ?	
Terms	Term's End Date	Required ?	

? If you do not specify a Term Name, Start Date, and End Date it will import into the current term (the Term including today's date). The preferred date/time format for Accudemia is "MM/DD/YYYY" when importing Term's Start Date and Term's End Date. If there are no Terms in Accudemia the import will fail.

? The Class Postix must be unique for each Class of a specific Course, this is usually used for Class Section Number

Tutor Assignment Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Tutors	Tutor's User ID	Required	Tutor Primary Key
Users > Tutors	Tutor's First Name	Required	
Users > Tutors	Tutor's Last Name	Required	
Users > Tutors	Tutor's Email	Optional !	
Users > Tutors	Tutor's Phone Number	Optional	
Users > Tutors	Tutor's Alternate ID	Optional *	
Users > Tutors	Tutor's Password	Optional *	
Subject Areas	Subject Area's name	Required	Subject Area Primary Key
Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code
Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix

! Email is not required but is used heavily if Centers will be offering appointments. This can also be used for general communications.

* Can be used for a Card Number or be their LDAP information.

Student Enrollment Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Students	Student's User ID	Required	Student Primary Key
Users > Students	Student's First Name	Required	
Users > Students	Student's Last Name	Required	
Subject Areas	Subject Area Name	Required	Subject Area Primary Key
Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code
Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class Postfix (or section number)	Required	
Classes	Class Short Name	Required	
Terms	Term's Name	Required ?	Term Primary Key
Terms	Term's Start Date	Required ?	
Terms	Term's End Date	Required ?	

? If you do not specify a Term Name, Start Date, and End Date it will import into the current term (the Term including today's date). The preferred date/time format for Accudemia is "MM/DD/YYYY" when importing Term's Start Date and Term's End Date. If there are no Terms in Accudemia the import will fail.

Simplified Class Registration Import

It would appear that the import files we show above have a lot of redundant information in them, but realize that if the data is already imported, then subsequent imports you can choose to use only the primary key or secondary key to identify that data.

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; }
.accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; }
.active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ }
.note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; }
.tg {border-collapse: collapse; border-spacing: 0; }
.tg td {font-family: Arial, sans-serif; font-size: 14px; padding: 10px 5px; border-
```


style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;} .tg th{font-family:Arial, sans-serif;font-size:14px;font-weight:bold;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;} .tg .tg-header{font-weight:bold;background-color:#dae8fc;border-color:inherit;text-align:left;vertical-align:top} .tg .tg-gray{background-color:#efefef;border-color:inherit;text-align:left;vertical-align:top} .tg .tg-white{border-color:inherit;text-align:left;vertical-align:top} .tg .tg-footer{border-style:solid hidden hidden hidden;font-weight:bold;font-style:italic;border-color:inherit;text-align:left;vertical-align:top}

Simplified Student Enrollment Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Classes	Class Registration Number (CRN)	Required	Class Primary Key
Subject Areas	Subject Area's name	Required	Subject Area Primary Key
Users > Students	Student's User ID	Required	Student Primary Key
Terms	Term's Name	Optional ?	Term Primary Key
Users > Instructors	Instructor's User ID	Required	Instructor Primary Key

? If you do not specify a Term Name and dates it will import into the current term.

Example: If I normally start by running a "student" import and then a "class" import as shown in the above imports. At this point I should have already created/imported my **Students, Instructors** details in the **Users** Table and the **Subject Areas (Courses) & Classes** in the database. Now when running the "enrollment" import (since these items already exist in the database) I can simply refer to them using their **primary key** fields on the subsequent imports. As an example my "Student Registration" import only has to include their **primary key** fields:

- **Student's User ID**
- **Subject Area Name**
- **Class Registration Number (CRN)**
- **Instructor's User ID**
- **Term Name**

Optional Imports

All of these imports are non-essential and would be something you may want to import to track groups and other items in the Accudemia Reports.

Course and Class Import with Instructor Assignments and Schedules

This import is only done for Supplemental Instruction Classes that you need to track in Accudemia.

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Subject Areas	Subject Area's name	Required	Subject Area Primary Key
Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code

Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix (or section number)	Required	Class Tertiary Key
Classes	Class's Days of Week	Optional !	
Classes	Class's Start Time	Optional *	
Classes	Class's End Time	Optional *	
Classes	Class's cut-off	Optional	
Classes	Class's tardy	Optional	
Classes	Class's Other	Optional	
Classes	Class's comments	Optional	
Classes	Class's active	Optional	
Users > Instructors	Instructor's User ID	Required	Instructor Primary Key
Users > Instructors	Instructor's First Name	Required	
Users > Instructors	Instructor's Last Name	Required	
Centers & Classrooms	Classroom's Name	Required	Classroom Primary Key
Terms	Term's Name	Required ?	Term Primary Key
Terms	Term's Start Date	Required ?	
Terms	Term's End Date	Required ?	

! If you use any format other than either the full name of the day (Monday, Tuesday, etc.) or just use the first three letters of the name (Mon, Tue, etc.); other abbreviations are not supported. Multiple dates can be split by a slash (i.e. Mon/Wed/Fri) then you will get an error.

*** The preferred time format for Accademia's Class's Start Time and Class's End Time is "HH:MM" (military time) when importing them. As well if you have not already set up your time zone then you'll want to do this prior to importing. Here is more information on this topic:**

[Setting up your Time Zone](#)

? If you do not specify a Term Name, Start Date, and End Date it will import into the current term (the Term including today's date). The preferred date/time format for Accademia is "MM/DD/YYYY" when importing Term's Start Date and Term's End Date. If there are no Terms in Accademia the import will fail.

User Group Registration Import

This import is only done to assign Group members that you need to track in Accademia.

Accademia Table	Accademia Field	Required for Creation	Key Field
User Groups	User Group's Name	Required	User Group Primary Key
Users > Students	Student's User ID	Required	Student Primary Key

Student-to-Tutor Associations/Restrictions Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Students	Student's User ID	Required	Student Primary Key
Users > Tutors	Tutor's User ID	Required	Tutor Primary Key
Centers and Classrooms	Center's Name	Required	Center Primary Key

NOTE: You must import a complete list of all Student-to-Tutor Associations/Restrictions for these to not clear out the existing Student-to-Tutor Associations/Restrictions already created manually in Accudemia. Also, you can only import one type of list or the other (Associations or Restrictions):

Create Job

Importing Behavior
Choose how the information will be processed when imported.

General Registration/Enrollment User Groups

Users Information

- ☐ Skip existent users (will not be updated).
- ☐ Generate a password for new users.
- ☐ Inactivate students not being imported.

Centers

- ☒ Do not create new centers automatically.

Student to Tutor

- ☐ Restrictions
- ☒ Associations

< Back Next > Cancel

Service-to-Course Associations Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Locations	Center Name	Required	Center Primary Key
Locations	Service Name	Required	Service Primary Key
Subject Areas	Subject Area's Name	Required	Subject Area Primary Key
Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix

NOTE: You must import a complete list of all Service-to-Course Associations for these to not clear out the existing Service-to-Course Associations already created manually in Accudemia.

Typical Single File Import

When working with other SIS (Student Information Systems) to get CSV extracts to import typically, you'll get all the information in a single file from those other systems (Datatel, Banner, PeopleSoft, etc.)

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; } .accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; } .active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ } .note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; } .tg {border-collapse:collapse;border-spacing:0;} .tg td{font-family:Arial, sans-serif;font-size:14px;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;} .tg th{font-family:Arial, sans-serif;font-size:14px;font-weight:bold;padding:10px 5px;border-style:solid;border-width:1px;overflow:hidden;word-break:normal;border-color:black;} .tg .tg-header{font-weight:bold;background-color:#dae8fc;border-color:inherit;text-align:left;vertical-align:top} .tg .tg-gray{background-color:#efefef;border-color:inherit;text-align:left;vertical-align:top} .tg .tg-white{border-color:inherit;text-align:left;vertical-align:top} .tg .tg-footer{border-style:solid hidden hidden hidden;font-weight:bold;font-style:italic;border-color:inherit;text-align:left;vertical-align:top}
```

Typical Single "All-in-one" File Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Users > Students	Student's User ID	Required	Student Primary Key
Users > Students	Student's First Name	Required	
Users > Students	Student's Last Name	Required	
Users > Students	Student's Active	Optional ^	
Users > Students	Student's Email Address	Optional !	
Users > Students	Student's Phone Number	Optional	
Users > Students	Student's Alternate ID	Optional *	
Users > Students	Student's Password	Optional *	
Subject Areas	Subject Area's Name	Required	Subject Primary Key

Subject Areas	Subject Area Prefix	Required	Secondary Key when combined with Subject Area Code
Subject Areas	Subject Area Code	Required	Secondary Key when combined with Subject Area Prefix
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix (or section number)	Required	Class Tertiary Key
Users > Instructors	Instructor's User ID	Required	Instructor Primary Key
Users > Instructors	Instructor's First Name	Required	
Users > Instructors	Instructor's Last Name	Required	
Users > Instructors	Instructor's Email Address	Optional !	
Terms	Term's Name	Optional ?	Term Primary Key
Terms	Term's Start Date	Optional ?	
Terms	Term's End Date	Optional ?	

^ The Active column is not required but is used to reactivate / inactivated students if using the "inactivate" option in the import behaviors section of the import job.

! Email is not required but is used heavily if Centers will be offering appointments to Students or if Centers will be sending Reports to Instructors. This can also be used for general communications.

* Can be used for a Card Number or be their LDAP information.

? If you do not specify a Term Name and dates it will import into the current term. The preferred date/time format for Accudemia is "MM/DD/YYYY" when importing Term's Start Date and Term's End Date.

Do you still have questions about the "All-in-one" import?

View the [accudemia-all-in-one-registration-import.pdf](#) Guide.

Accudemia Database Tables & Fields Information

For more info about the database structure and the database field requirements visit: [Accudemia Fields Information](#)

Download CSV Import Samples

Download your Accudemia Import Sample files: [CSV Import Sample Files](#)

Guides for Special Import Options

These guides try to walk you through creating setting up special import options that may be needed

and explains the options to try to simplify the process.

```
button.accordion { background-color: white; color: #286DA8; cursor: pointer; padding: 18px; width: 75%; border: none; text-align: left; outline: none; font-size: 21px; font-weight: bold; transition: 0.4s; }
button.accordion.active, button.accordion:hover { background-color: #7c9f22; color: #000000; }
div.panel { padding: 0 18px; display: none; background-color: white; }
.accordion:after { content: '\02795'; /* Unicode character for "plus" sign (+) */ font-size: 13px; color: #777; float: right; margin-left: 5px; }
.active:after { content: "\2796"; /* Unicode character for "minus" sign (-) */ }
.note { background-color: #ffffcc; border-left: 6px solid #ffeb3b; }
```

Importing Demographic Information

Start by creating the **Profile Questionnaire** that will be the table these custom fields will be imported into **Accudemia**:

[Create Profile Questionnaire Step-by-Step](#)

Profile answers do not have to be mapped if you are importing from a CSV file. The reason why it works this way is that you can have several questions across different pages.

Instead, profile answers require specific headers. The format of the header is *@Profile(Page=X, Question=Y)* where *X* represents the number of the page and *Y* represents the number of the question to set.

For example, if your profile questionnaire has 2 pages with 3 questions each, you should have 6 columns with the following headers:

- @Profile(Page=1, Question=1)
- @Profile(Page=1, Question=2)
- @Profile(Page=1, Question=3)
- @Profile(Page=2, Question=1)
- @Profile(Page=2, Question=2)
- @Profile(Page=2, Question=3)

Also, you can use a shorter version of the header by not specifying the words "Page" and "Question," for example, @Profile(1,2) for page #1, question #2.

If you are editing your CSV file with Microsoft Excel, you might receive an error saying, "That function is not valid." To solve that problem, you need to add a white space before the '@.'

In multiple choice questions, you have to specify the text of the option you want. For example, if the question has the possible answers "Yes", "No", "Maybe", then you can enter the text "Maybe" in your CSV file.

Student Groups from Demographics / Profile

While uploading this information to store on the **Students** themselves you can also create **Student Groups** to help the **System Admins** have highly usable groups based on these demographics to pull reports on in **Accudemia**. Follow these steps to do this:

1. Create the import job in ADX.
2. Map the @Profile(1,1) column (as an example) to "User Groups Name" and be sure to also map the Student ID column to "Students User ID" in ADX.
3. On the **Import Behavior** step of the import job wizard be sure to always check the "Remove Users not on this import" option so that the group is updated every-time it is imported. The only

time this option will not be necessary if you only import partial files of students.

You can only map one column to the "User's Group Name" in each import, so you'll have to create a separate import job for each demographic column you need to create groups from.

Be careful when uploading information using simple answers like "yes", "no" or using similar codes in multiple columns because these will become the **Student Group names**.

As an example of this error uploading **Student Groups**:

If I upload a file with their "In-state Status" of "Yes" and "No" in one column and then upload another file with their "Veteran Status" of "Yes" or "No," it will overwrite the previous "Yes" group created.

As a possible solution when I have a demographic like "Veteran Status" and it has "Yes" or "No," I would need to replace all the "yes" answers to "Veteran" and the "No" to "Non-Veteran" so these import into easily identifiable groups in **Accudemia**.

More information about importing users into student groups is available here:

<https://desk.zoho.com/portal/engineerica/en/kb/articles/ac-17-11-2020>

Tips for Importing Class Schedules

In order to import the class schedule, you can start from your class import file which has Subject Area info and Class data. Then add the following columns:

- **Schedule Days:** The day of the week when the class is given, either using a 3 letter abbreviation or using the full day name. For example, Mon, Tue, Wed, Thu, Fri, Sat, Sun or Monday, Tuesday, etc. You can multiple days by separating them by a forward slash (/). For example, Mon/Wed/Fri.
- **Start:** The start time of the class, in format "h:mm tt". Valid examples are: 10:00am, 3:15pm.
- **End:** The end time of the class, in format "h:mm tt". Valid examples are: 10:00am, 3:15pm.
- **Classroom:** Where the class will be given, it's the name of an existent classroom, such as "A100", "SCH 5", etc.

Here's a simple example:

Subject Area Name	CRN	ClassPostfix	Class Short Name	ScheduleDays	Start	End	Classroom
Algebra I	45688	001	Algebra I[MAT101001](45688)	Mon/Wed/Fri	11:00am	12:30pm	A-101
Algebra II	84654	002	Algebra II[MAT201002](84654)	Thu	8:00am	12:30pm	A-101

When running the **Create Job Wizard** in ADX and you want the classrooms to be created automatically when you import, ensure that on **General tab** of the **Importing Behavior** step the *"Do not Create New Centers/Classrooms automatically"* checkbox is unchecked.

Create Job

Importing Behavior
Choose how the information will be processed when imported.

General | Registration/Enrollment | User Groups

Users Information

- ☐ Skip existent users (will not be updated).
- ☐ Generate a password for new users.

Centers

- ☐ Do not create new centers automatically.

< Back Next > Cancel

How to Import Student Photos

Frances Ackerman-Edelen
✕

Discard

Save Changes

General

Security

Profile

Enrollment

First name


Middle name

Last name

Birthdate

Gender

Admin notes



Remove Upload

Emails

✕

+

If you want to have student and employee phones, just as shown above, it is possible to import profile pictures using the Accudemia Data eXchange (ADX) import/export tool. Let's see how you can do this.

1. First of all, you need to [download and install ADX](#) in your computer. If you already had it installed, then make sure to update to the latest version (click on *Help* -> *Check for Updates*). Then log in with your credentials and create a new import job. You will need to have all the photos and create a new CSV file to tell Accudemia what photo assign to each user.
2. For example, if you have a folder in your computer with all the photos name like "student_[ID].jpg", where [ID] is the student number, create a CSV like this:

	A	B
1	Student ID	Photo Name
2	154-61-5615	Student_154615615.jpg
3	111-11-1113	Student_111111113.jpg
4	000-02-2123	Student_000022123.jpg
5	346-54-6164	Student_346546164.jpg
6	987-51-6597	Student_987516597.jpg
7	000-19-7948	Student_000197948.jpg
8		

3. Then, open ADX and create a new job. You need to select the CSV file and the folder where all your photos are located, as shown here:

Create Job

Choose a Data Source
Select the source from which to copy data.

Data Source: Comma separated text file

Select File: C:\Users\Engineerica\Accudemia My New CSVs\Student_Info_Photos.csv

Photos Directory: C:\Users\Engineerica\Photos_Directory\

File Settings

Field Delimiter: Comma

Text Qualifier: "

Headers must be present, although the names can be anything you want. [Learn more.](#)
[Learn how to import profile answers.](#)
[Download csv file samples.](#)

< Back Next > Cancel

4. Then you need to map the student fields, at least the student number and the photo name, as shown here:

Create Job

Choose a Data Source
Select the source from which to copy data.

Data Source: Comma separated text file

Your Header	Sample Data	Maps To
Student ID	154-61-5615, 111-11-1113, 000-02-2123	Student's User ID
Photo Name	Student_154615615.jpg, Student_111111113.j...	Student's Photo

< Back Next > Cancel

5. The last step would be to click Next until your job is saved and then run it by clicking on "Run Import Now".

That's it, now simply log in to Accudemia and your photos will be there!

Import Behaviors

In this section, you'll be able to select options that when chosen will determine how the data on the imports will be handled.

General

This area determines how Users and Centers/Classrooms are updated on the import.

Users Information:

- **Skip existent users (will not be updated)** - This option allows you to import only new students from the updated file you are uploading and it will not even attempt to update students that exist in the Accudemia database.
- **Generate a password for new users** - This option allows you to create a password for your new users. (Unfortunately no one will know this password unless you provide the email address.)
***Warning!** Each student will be notified via email about this newly created password.*
- **Inactivate students not being imported** - This option helps keep only active students in your Accudemia database based off the ones being imported regularly. This option only helps or is useful when importing the entire student roster.

Important: Must include an "Active" column with "yes", "true", or "1" on the imports for this "Inactivate Students" feature to run properly.

Centers and Classrooms:

- **Do not create new centers/classrooms automatically** (Selected by default) - Uncheck this option if you do want to create new centers and classrooms from the import. Typically if you have a lot of centers or classrooms you need created this will become helpful.

Student to Tutor:

- **Restrictions/Associations** - This only applies if you are uploading Student-to-Tutor Restrictions or Associations and allows you to choose which one of these you are uploading.

Enrollment/Registration/Assignments

This section determines how you handle Student Enrollment, Instructor Registration, and Tutor Assignments when imported.

Student Enrollment:

- **Overwrite students enrollment** - This setting makes the system update the enrollment for the users being imported. If not checked it will append/add to the classes that the students are enrolled in so this option is strongly recommended during the import of enrollment.
 - **Drop all enrollment for students not being imported** - This setting takes the first option of "Overwrite students enrollment" a step further by also dropping student enrollment from any student in the Accudemia database that is not on this current import.

Just for clarification on how these settings work:

1. **If both are NOT checked:** the enrollment you import is appended to the existing enrollment a student has in Accudemia. This means that no drops are done at all.

2. **If only “Overwrite students enrollment” is checked:** The enrollment for the students being imported will be overwritten for the Terms being uploaded. This means that if you import a student with classes "1", "2", and "3" in their enrollment one time. And then you import the same student with registration to classes "1", "2", and "4" the next import; Accademia will drop the existent enrollment for the "3" class since it was not part of the classes being imported currently. All other students not being imported won't be touched and will still have all their enrolled classes.
3. **If both options are checked:** First all the existent enrollment data for the semesters being uploaded for all the students will be dropped. Once dropped, the new data will begin enrolling students for the semesters being imported. That means that if you import enrollment for only students A and B then any other students (such as C and D who were already imported) will end up with no classes enrolled.

Instructor Registration:

- **Overwrite instructors registration.** - This setting makes the system update the enrollment for the users being imported. If not checked it will append/add to the classes that the instructors are registered for so this option is strongly recommended during the import of enrollment.
 - **Drop all assignments for instructors not being imported.** - This setting takes the first option of "Overwrite instructors registration" a step further by also dropping instructor registration from any instructor in the Accademia database that is not on this current import.

Just for clarification on how these settings work:

1. **If both are NOT checked:** the assignments you import are appended to the existing assignments an instructor has in Accademia. This means that no drops are done at all.
2. **If only “Overwrite instructors assignments” is checked:** The assignments for the instructors being imported will be overwritten for the Terms being uploaded. This means that if you import instructors A and B with their assignments, Accademia will drop the existent assignments for those 2 instructors and set the only the ones being imported currently. All other instructors not being imported (such as instructors C and D) won't be touched.
3. **If both options are checked:** Before importing anything, all the existent assignments for the semester being uploaded, for all the instructors will be dropped. Once dropped, the new data will be inserted for the semesters being imported. That means that if you import assignments for only instructors A and B, other instructors ents (such as C and D) will end up with no classes enrolled.

Tutor Assignments:

- **Append to current assignments** - This allows you to import a file with new tutor assignments to add to existing tutor assignments in Accademia.
- **Overwrite current assignments** - This allows you to overwrite with an updated import file with all the tutor assignments in it.
- **Overwrite current assignments and assign all imported tutors to all subject areas (Imported assignments will be ignored)** - This will give all tutors in the import file all classes (typically used only if you are uploading a list of tutors and you don't want to have to manage the tutor assignments in Accademia.

User Groups

This section determines how user groups are updated on import.

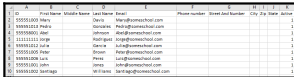
- **Remove non-imported users from groups.** - This option allows the group to be updated by removing all members of the group and then adding only the ones on the import file. With this option unchecked it will simply append/add members to the group but not remove them. If you are not importing any one of the above-mentioned items in this **Importing Behaviors** section then the section's behaviors will be ignored when you import your CSV file and the settings can be omitted. For example, when I import a "Student Information" CSV file, I only need to set the settings in the sections about Users and Students. If I choose to include their enrollment on that file later, then I'd need to make sure to check the **Enrollment/Registration/Assignments** settings in that tab/section of the **Import Behaviors**.

Exporting your Data

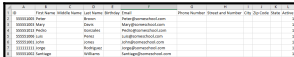
Purpose: To export your data as a CSV file.
How to Access: **Administration > Advanced > Export**

The available data to download:

All Users

Report Information	Sample
<p>Purpose: Export all users in Accudemia.</p> <p>Available Filters: None</p> <p>Summary By:None</p> <p>Available Options: None</p> <p>Description: This report creates a CSV file with all the users in Accudemia, this type of file can be read and enhanced in MS Excel as needed</p>	

Students

Report Information	Sample
<p>Purpose: Export all students in Accudemia.</p> <p>Available Filters: None</p> <p>Summary By:None</p> <p>Available Options: None</p> <p>Description: This report creates a CSV file with all the students in Accudemia, this type of file can be read and enhanced in MS Excel as needed.</p>	

Tutors

Report Information

Purpose: Export all Tutors in Accudemia.

Available Filters: None

Summary By:None

Available Options: None

Description: This report creates a CSV file with all the tutors in Accudemia, this type of file can be read and enhanced in MS Excel as needed.

Sample

	First Name	Second Name	Last Name	Birthdate	Gender	Phone Number	Address and Number	City	State	Zip Code	Notes
1	00000001	John	Smith	1980-01-01	Male	0000000000000000					
2	00000002	Jane	Smith	1980-01-01	Female	0000000000000000					
3	00000003	John	Smith	1980-01-01	Male	0000000000000000					
4	00000004	Jane	Smith	1980-01-01	Female	0000000000000000					
5	00000005	John	Smith	1980-01-01	Male	0000000000000000					
6	00000006	Jane	Smith	1980-01-01	Female	0000000000000000					
7	00000007	John	Smith	1980-01-01	Male	0000000000000000					
8	00000008	Jane	Smith	1980-01-01	Female	0000000000000000					
9	00000009	John	Smith	1980-01-01	Male	0000000000000000					
10	00000010	Jane	Smith	1980-01-01	Female	0000000000000000					

Instructors

Report Information

Purpose: Export all Instructors in Accudemia.

Available Filters: None

Summary By:None

Available Options: None

Description: This report creates a CSV file with all the Instructors in Accudemia, this type of file can be read and enhanced in MS Excel as needed.

Sample

	First Name	Second Name	Last Name	Birthdate	Gender	Phone Number	Address and Number	City	State	Zip Code	Notes
1	00000001	John	Smith	1980-01-01	Male	0000000000000000					
2	00000002	Jane	Smith	1980-01-01	Female	0000000000000000					
3	00000003	John	Smith	1980-01-01	Male	0000000000000000					
4	00000004	Jane	Smith	1980-01-01	Female	0000000000000000					
5	00000005	John	Smith	1980-01-01	Male	0000000000000000					
6	00000006	Jane	Smith	1980-01-01	Female	0000000000000000					
7	00000007	John	Smith	1980-01-01	Male	0000000000000000					
8	00000008	Jane	Smith	1980-01-01	Female	0000000000000000					
9	00000009	John	Smith	1980-01-01	Male	0000000000000000					
10	00000010	Jane	Smith	1980-01-01	Female	0000000000000000					

Classes

Report Information

Purpose: Export all Classes in Accudemia.

Available Filters: None

Summary By:None

Available Options: None

Description: This report creates a CSV file with all the Classes in Accudemia, this type of file can be read and enhanced in MS Excel as needed.

Sample

	First Name	Second Name	Last Name	Birthdate	Gender	Phone Number	Address and Number	City	State	Zip Code	Notes
1	00000001	John	Smith	1980-01-01	Male	0000000000000000					
2	00000002	Jane	Smith	1980-01-01	Female	0000000000000000					
3	00000003	John	Smith	1980-01-01	Male	0000000000000000					
4	00000004	Jane	Smith	1980-01-01	Female	0000000000000000					
5	00000005	John	Smith	1980-01-01	Male	0000000000000000					
6	00000006	Jane	Smith	1980-01-01	Female	0000000000000000					
7	00000007	John	Smith	1980-01-01	Male	0000000000000000					
8	00000008	Jane	Smith	1980-01-01	Female	0000000000000000					
9	00000009	John	Smith	1980-01-01	Male	0000000000000000					
10	00000010	Jane	Smith	1980-01-01	Female	0000000000000000					

Subject Areas/Courses

Report Information

Sample

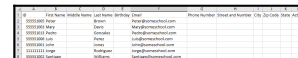
Purpose: Export all Subject Areas in Accudemia.

Available Filters: None

Summary By:None

Available Options: None

Description: This report creates a CSV file with all the Subject Areas in Accudemia, this type of file can be read and enhanced in MS Excel as needed.



ID	Name	Description	Other Details
00000001	Math	Mathematics	
00000002	Science	Science	
00000003	History	History	
00000004	Art	Art	
00000005	Music	Music	
00000006	Physical Education	Physical Education	
00000007	Health	Health	
00000008	Language Arts	Language Arts	
00000009	Foreign Languages	Foreign Languages	
00000010	Computer Science	Computer Science	

- **Student Enrollment** - Gets all students and the classes where they are enrolled.
- **Tutor Assignments** - Lists all tutors assigned to a subject area, and their assignments.
- **Session Logs** - Lists all session logs registered in the past, including the details of each one of them.
 - **Last 7 Days Session Logs** - Lists all session logs registered in the last 7 days, including the details of each one of them.
 - **Last Month Session Logs** - Lists all session logs registered in the past month, including the details of each one of them.
 - **Last 3 Months Session Logs** - Lists all session logs registered in the past 3 months, including the details of each one of them.
 - **Last 6 Months Session Logs** - Lists all session logs registered in the past 6 months, including the details of each one of them.
 - **Last Year Session Logs** - Lists all session logs registered in the past year, including the details of each one of them.
- **All Appointments** - Lists all appointments made in the past and the future.
 - **Last 7 Days Appointments** - Lists all appointments made in the last 7 days.

Scheduled or Automated Imports / Exports

In this section, you'll learn what you need to do to schedule imports or exports. There are some prerequisites that we'll review as well to complete this process. All of these have been explained above but you can review these are the prerequisites links:

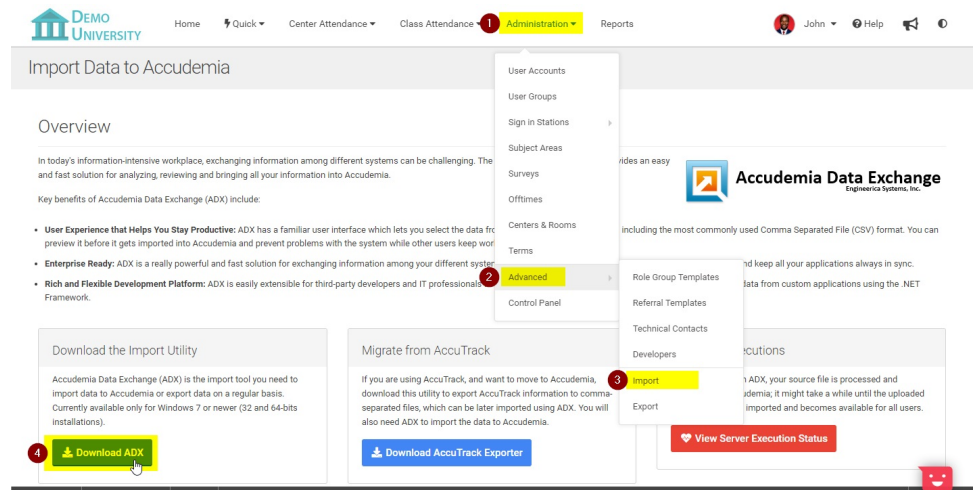
1. [Download and install ADX \(Accudemia Data eXchange\)](#).
2. [Setup an Import Job or Export Job](#)
 - **Scheduled Import Options:**
 1. Any Import Type
 - **Scheduled Export Options:**
 1. **All Users** - Lists all users in the system, including some useful information such as email, address, and

phone number.

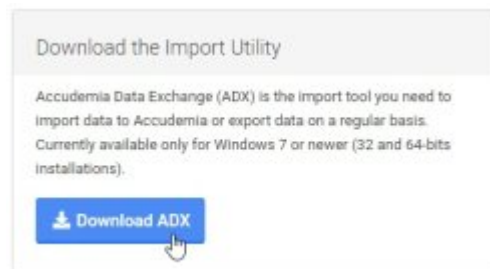
2. **Students** - Lists all students in the system, with detailed information.
 3. **Tutors** - Lists all tutors in the system, with detailed information.
 4. **Instructors** - Lists all instructors in the system, with detailed information.
 5. **Classes** - Lists all classes in the system.
 6. **Subject Areas** - Lists all subject areas in the system.
 7. **Student Enrollment** - Gets all students and the classes where they are enrolled.
 8. **Tutor Assignments** - Lists all tutors assigned to a subject area and their assignment.
 9. **Session Logs** - Lists all session logs registered in the past, including the details of each one of them.
 10. **Last 7 Days Session Logs** - Lists all session logs registered in the last 7 days, including the details of each one of them.
 11. **Last Month Session Logs** - Lists all session logs registered in the past month, including the details of each one of them.
 12. **Last 3 Months Session Logs** - Lists all session logs registered in the past 3 months, including the details of each one of them.
 13. **Last 6 Months Session Logs** - Lists all session logs registered in the past 6 months, including the details of each one of them.
 14. **Last Year Session Logs** - Lists all session logs registered in the past year, including the details of each one of them.
 15. **All Appointments** - Lists all appointments made in the past and the future.
 16. **Last 7 Days Appointments** - Lists all appointments made in the last 7 days.
3. Once these are complete you should be able to schedule your import/export as explained below:
- [Schedule Imports / Exports in ADX](#) (Accudemia Data eXchange).

Prerequisite 1 - Download and install ADX

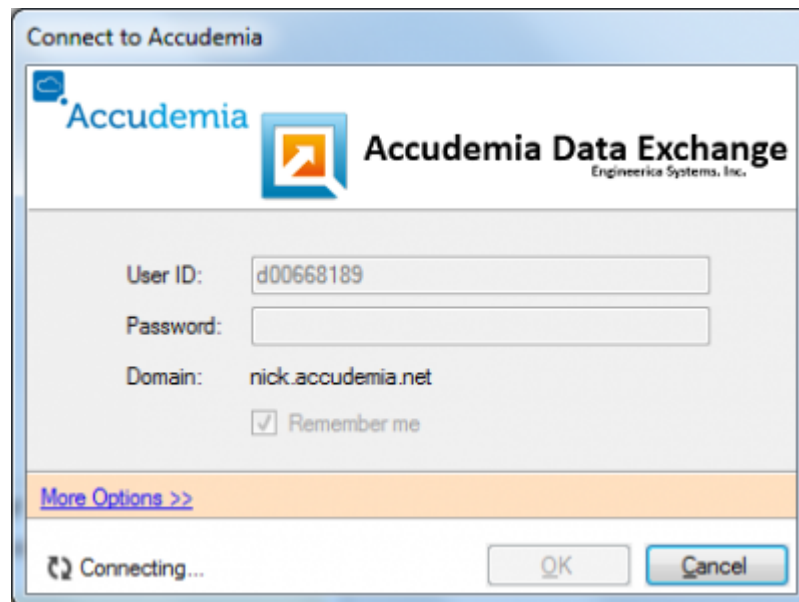
Step 1: When you log into Accudemia as a System Admin Go to **Advanced > Imports**



Step 2: Then under the “Get it Now!” Heading click on the following Icon:

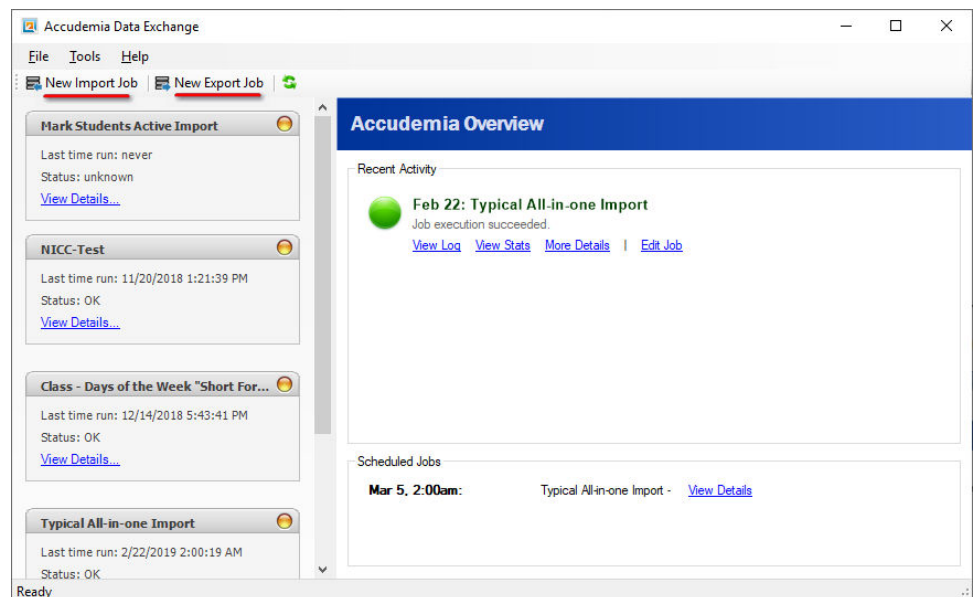


Step 3: Follow the instructions to install. Then go ahead and store your login credentials on the first screen.



Prerequisite 2 - Setup an Import Job or Export Job

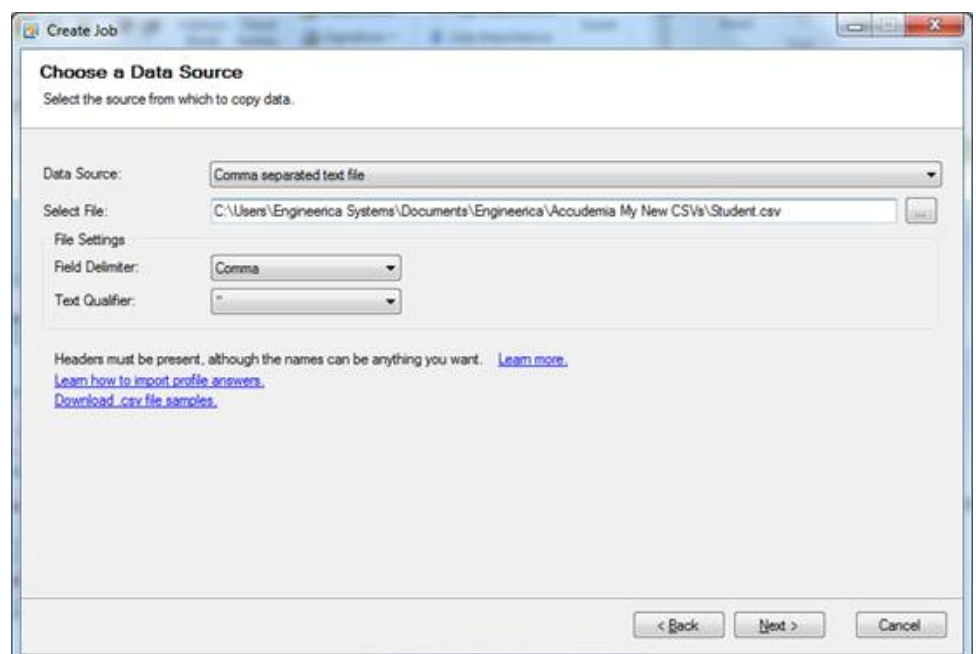
Step 1: Once logged into the software/school.accudemia.net site, click on either “New Import Job” or “New Export Job”:



Step 2: Once you click “next” on the first screen of the import/export wizard, either:

1. Select the CSV file for the import **OR**
2. Select the type of export job and the file location with the name you want to use for the export file

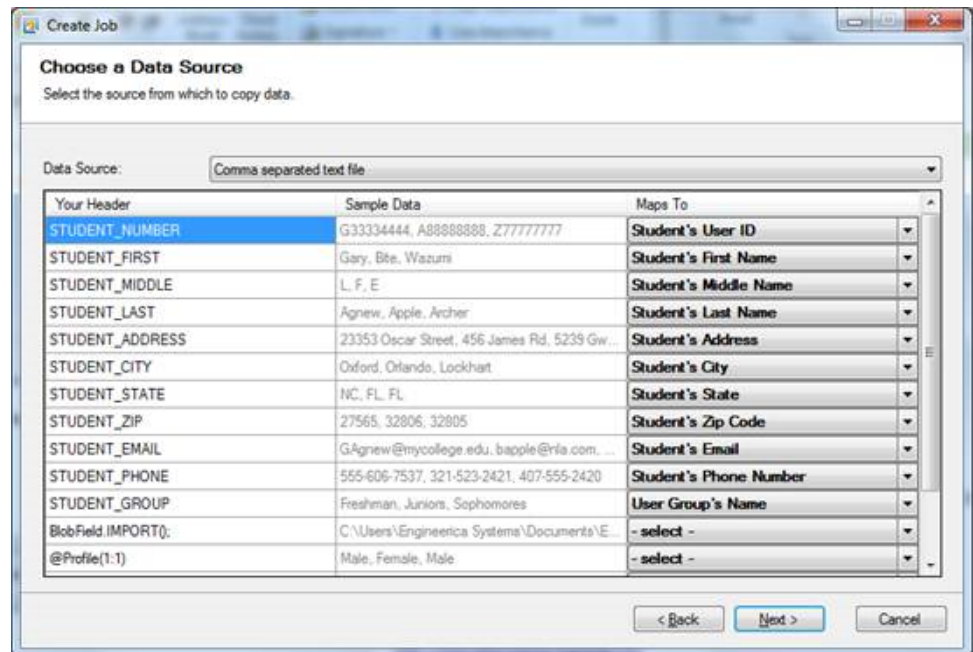
by clicking the **browse(...)** button and when done finally click **next** button.



Step 3: Now if importing ADX wants you to map the fields with drop-downs to each of the ones in your CSV file, please notice that the fields shown on the left belong to your CSV file columns while on the right you can link to the desire Accademia field. Click next when done.

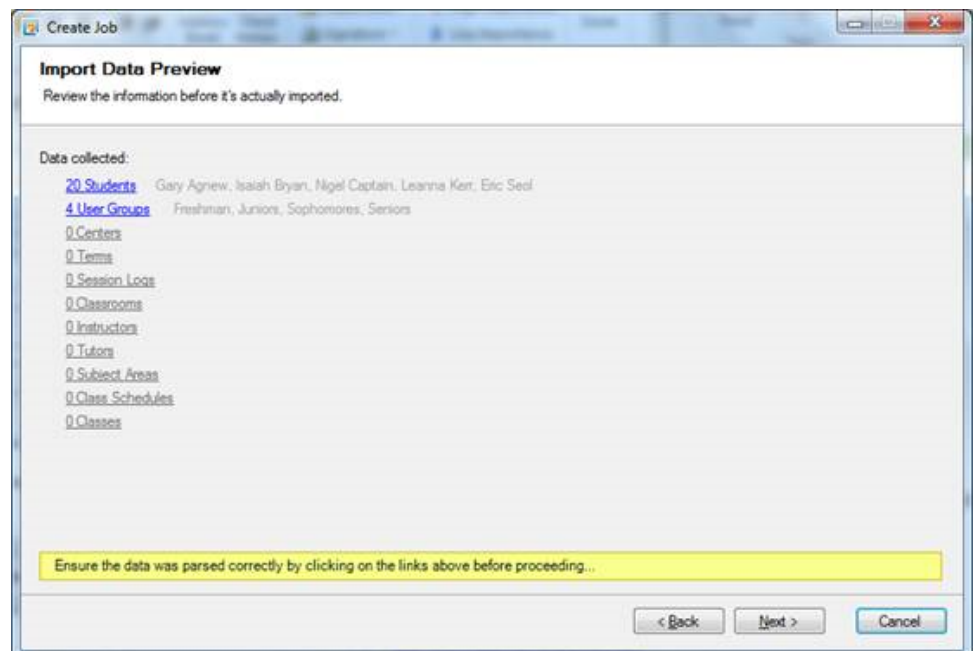
Note: Exports will not have this step. **Note:** If you bring Profile based columns on your CSV file do not map them with any field on the right,

Accudemia knows how to import this data **Note:** Those CSV columns without mapping pairs will not be considered by ADX



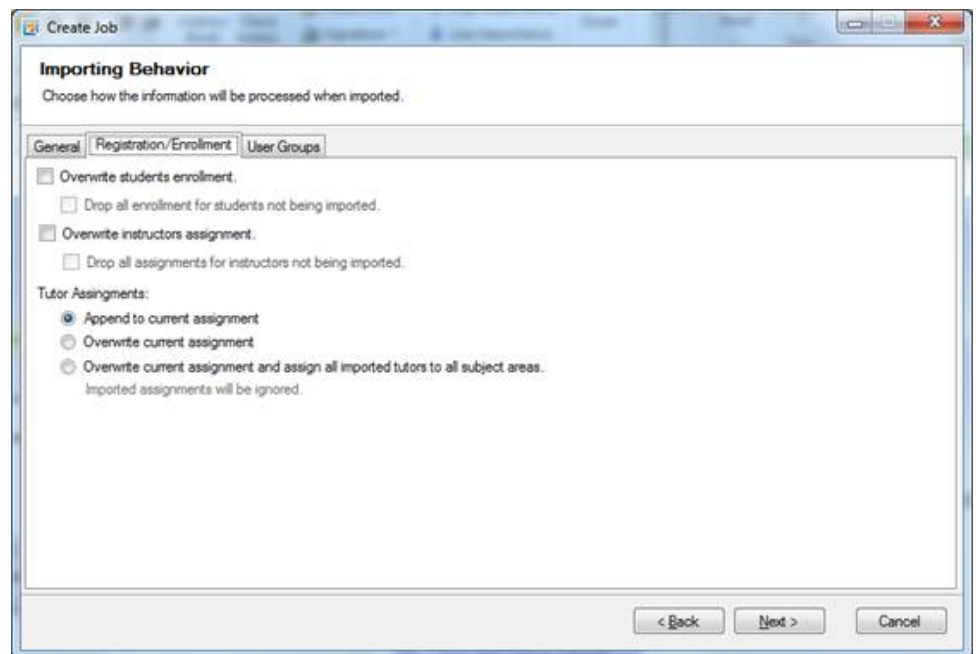
Step 4: Then it shows you the results of what it found to import; you can click on each item found to see what data it's pulling, it is always important to check the number of items been recognized, comparing that number with the number of items we know is in the file allows to recognize whether there is a mismatch indicating some problem, then click next.

Note: Exports will not have this step.

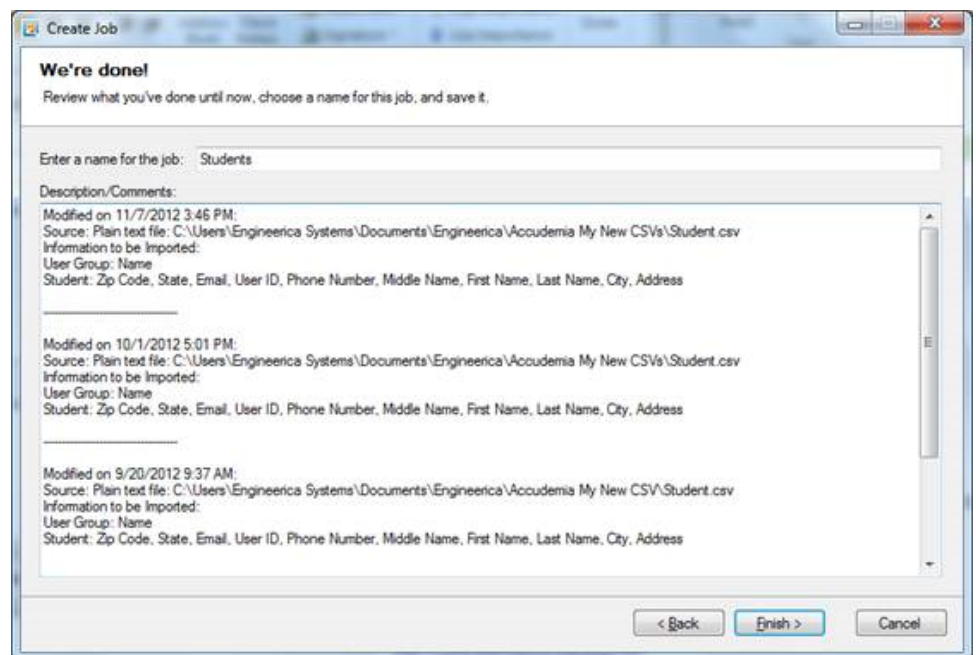


Step 5: At this point, it wants to know if you want to overwrite data, I would have it set to append for now until ready for a new semester to overwrite. Click next.

Note: Exports will not have this step.



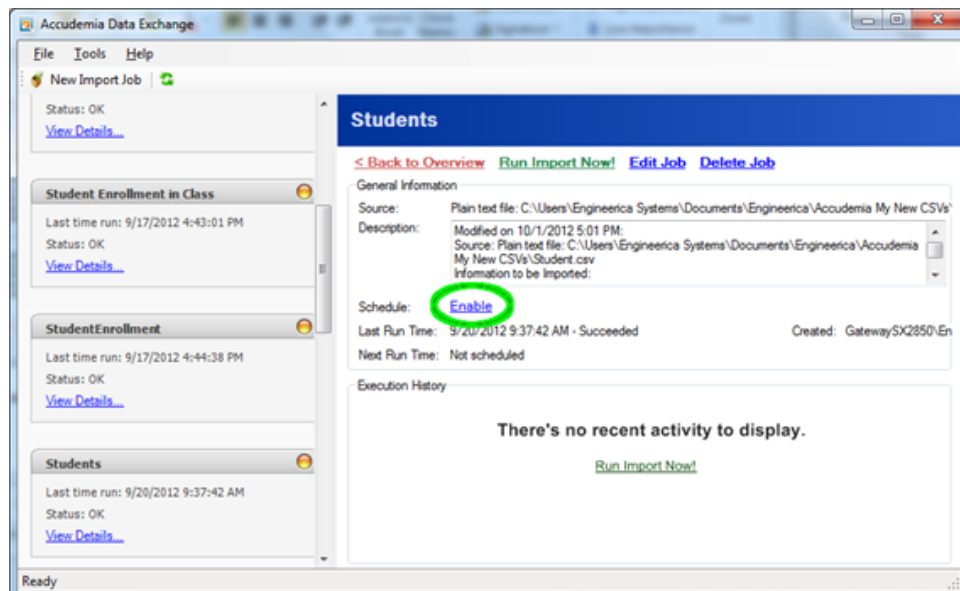
Step 6: Finally, name the Import Job or Export Job and click the **Finish** button.



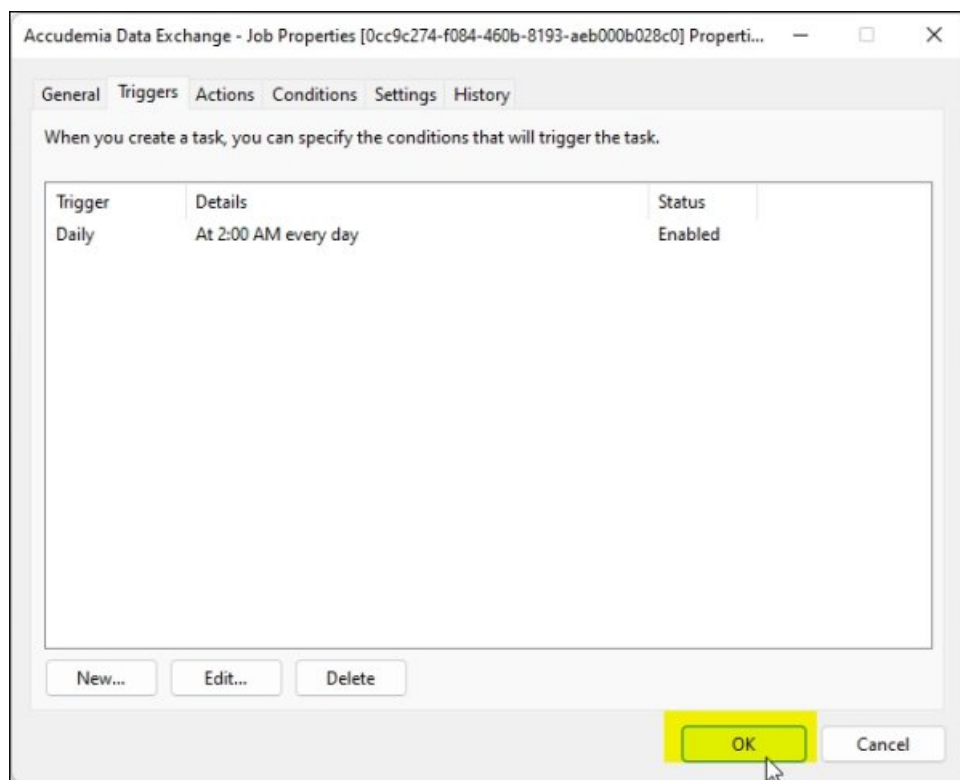
Schedule Imports / Exports in ADX

Now that we know where and what data to pull/push, we can proceed to automate this process if we want to (you could decide to run the import manually instead).

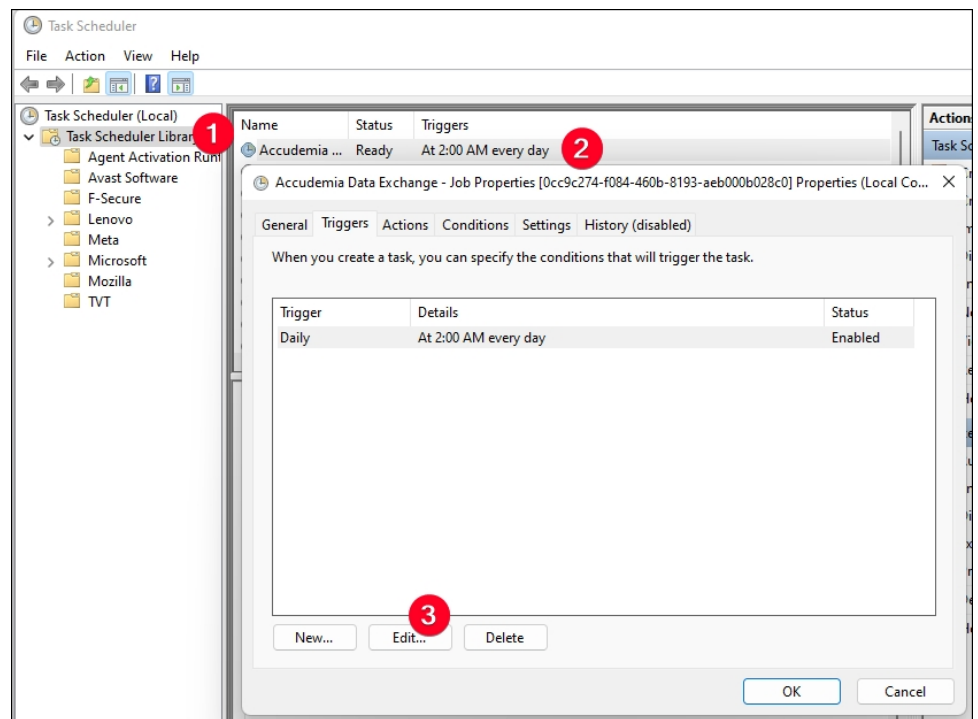
Step 1: Start by clicking “view details” on the left column under the import job and then under the schedule option click “Enable”.



Do not do any more changes here, just click the OK button (all changes will be made on Windows “Task Scheduler”)

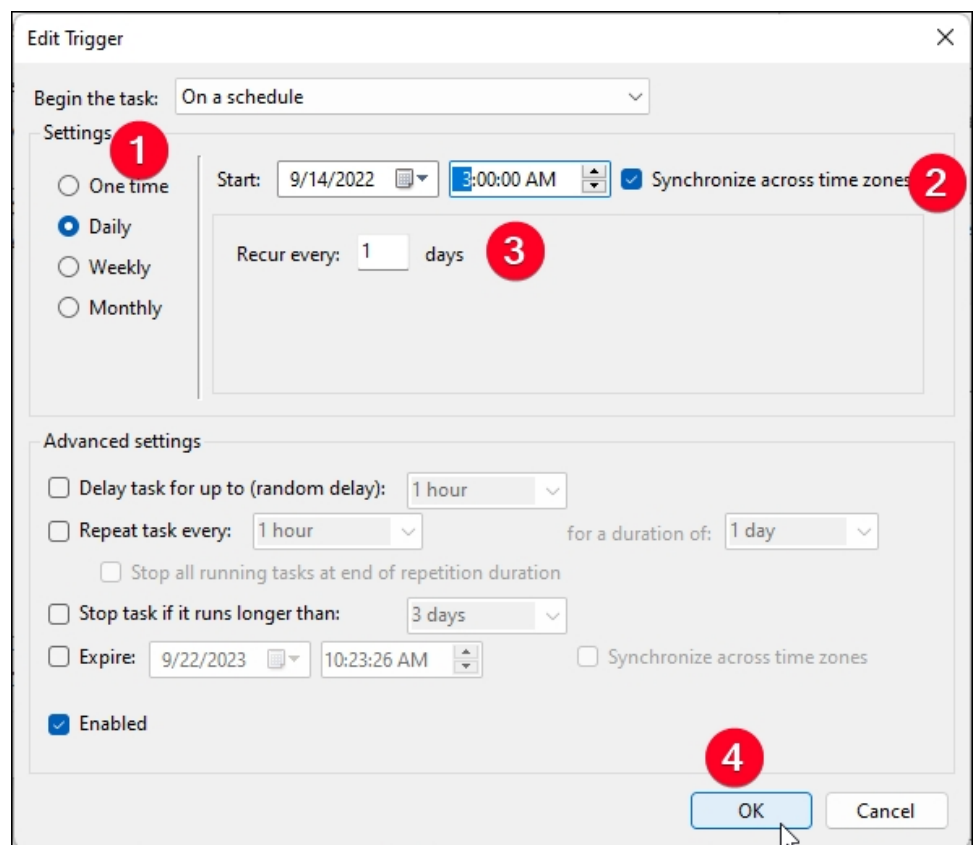


Step 2: Open Windows “Task Scheduler”, search for the newly created task (it will have Accudemia in the name), and double click on the task to set up your task recurrence intervals (how often the task will run). Click “OK”.



In the “Edit trigger” screen you can choose the periodicity, and time for it to run as needed, typically this type of import is set to run daily during the night.

Change the default time from 2:00 AM to any other hour during the night if possible

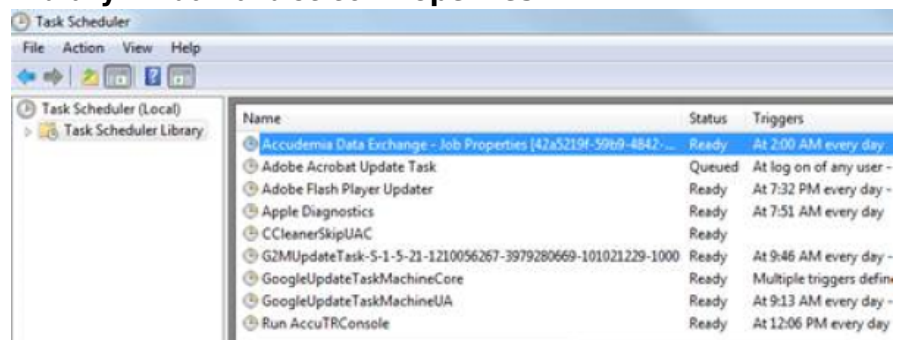


For the first few days it is always important to check if the task is running correctly, in case we need to fix/redesign something in the process.

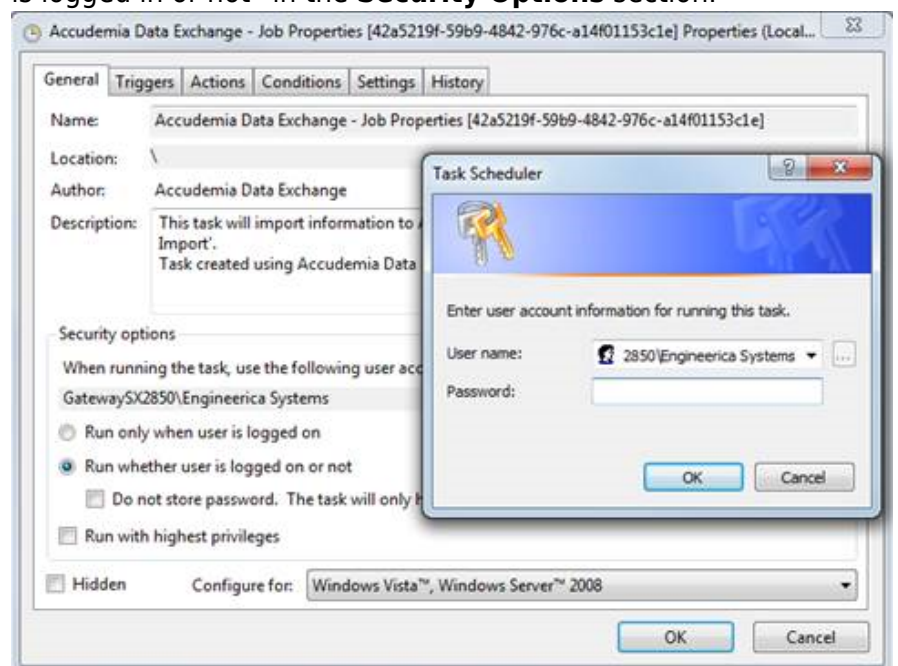
Want to run the ADX Import/Export Job when you are not logged in?

If you happen to need to run the scheduled automated imports/exports when the user is not logged into the computer or server, you'll need to go directly into the **Windows Task Scheduler** itself and set this permission by editing the properties of the ADX import job.

1. First, open **Windows Task Scheduler** from the Windows Start menu or settings.
2. Next, right-click the ADX Import job in the **Task Scheduler Library** window and select **Properties**.



3. On the **General** tab of the properties, set the job to store your Windows User Credentials by selecting the "Run whether the user is logged in or not" in the **Security Options** section.



4. When you click **OK** at the bottom, you'll now be prompted to enter and store your Windows User Credentials.

If you ever change your passwords, then you'll need to come and update this section.

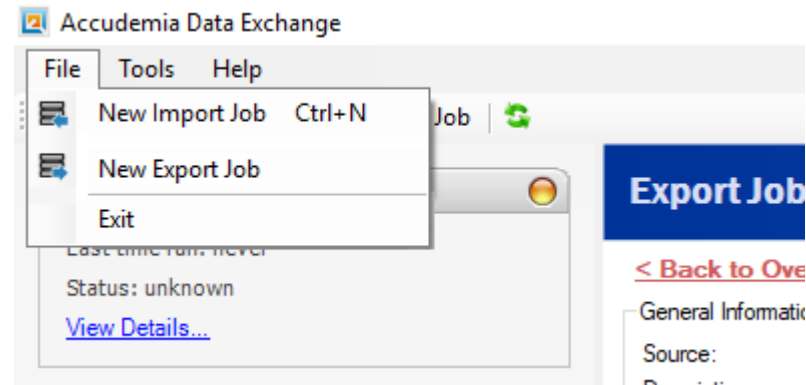
Other Options in ADX

In this section, we'll explore the different options you have available in

the ADX toolbars.

File

These are the typical actions you would perform in ADX:



Create New Import Job

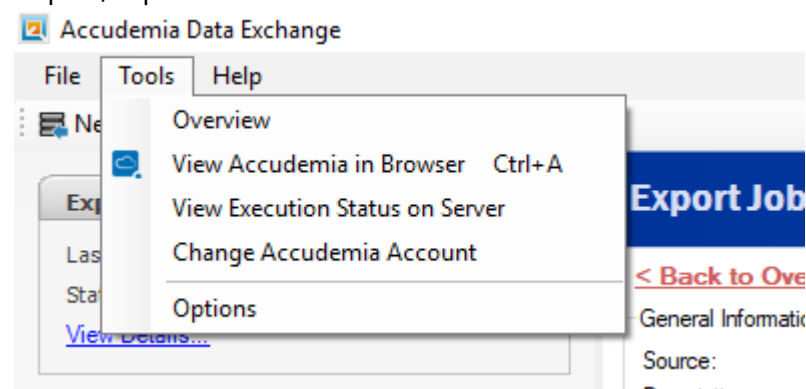
[See above for more details on this process.](#)

Create New Export Job

[See above for more details on this process.](#)

Tools

These are some useful options available to you while working on the import/export tool.



Overview

This menu option takes you to an overview of the past ran jobs in ADX.

View Accudemia in Browser

This option passes over the credentials of the user currently logged into the ADX application to accudemia.net so they can look at account settings and import history without having to re-login.

View Accudemia in Browser

This option also passes over the user's credentials currently logged into the ADX application to accudemia.net. Still, it takes the user specifically to the import history on the server without having to re-login.

Change Accudemia Account

This option allows you to change/update/designate who is logged in to run the imports.

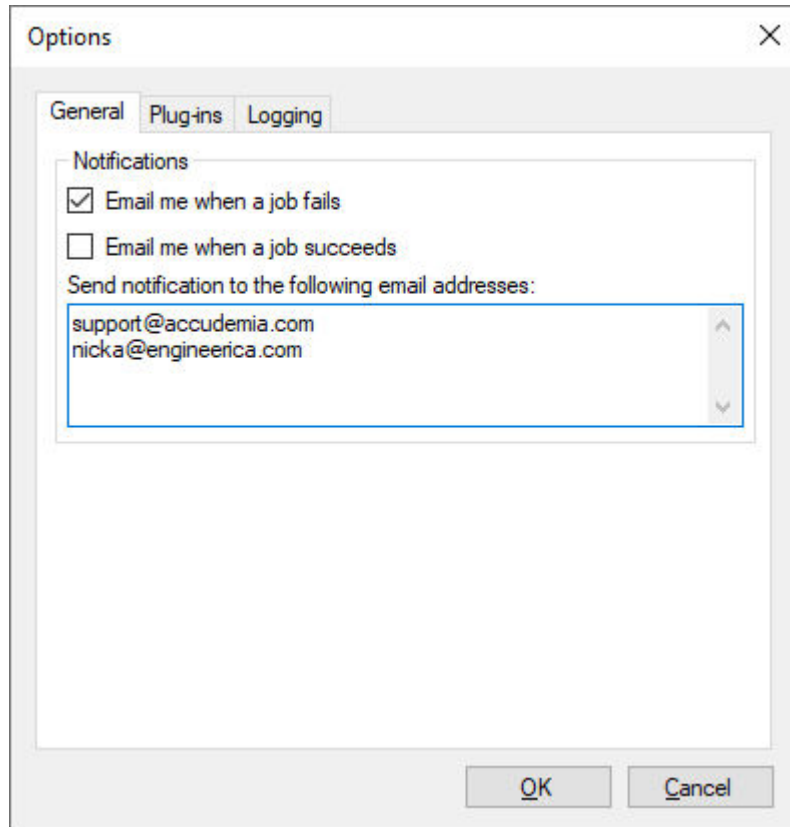
This person will be sent the status of the imports via email on whether or not they failed or succeeded on the Accudemia server-side.

Options

This section gives you additional means to use, troubleshoot, and analyze import or export jobs that are having issues.

General Tab

This section allows you to email notifications about Imports/Exports failing or succeeding to a list of individuals by placing emails separated by a return in the textbox. If you want to email 2 people about only failures see below:

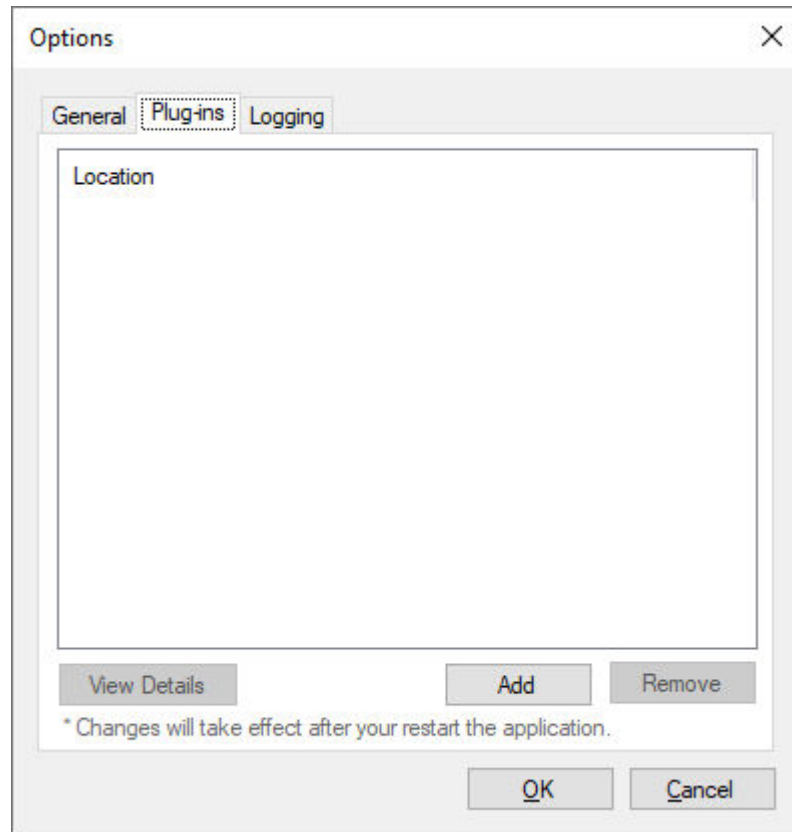


The image shows a screenshot of an 'Options' dialog box. It has three tabs: 'General', 'Plug-ins', and 'Logging'. The 'General' tab is selected. Under the 'Notifications' section, there are two checkboxes: 'Email me when a job fails' (checked) and 'Email me when a job succeeds' (unchecked). Below these is a text label 'Send notification to the following email addresses:' followed by a text area containing two email addresses: 'support@accudemia.com' and 'nicka@engineerica.com'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Plug-ins Tab

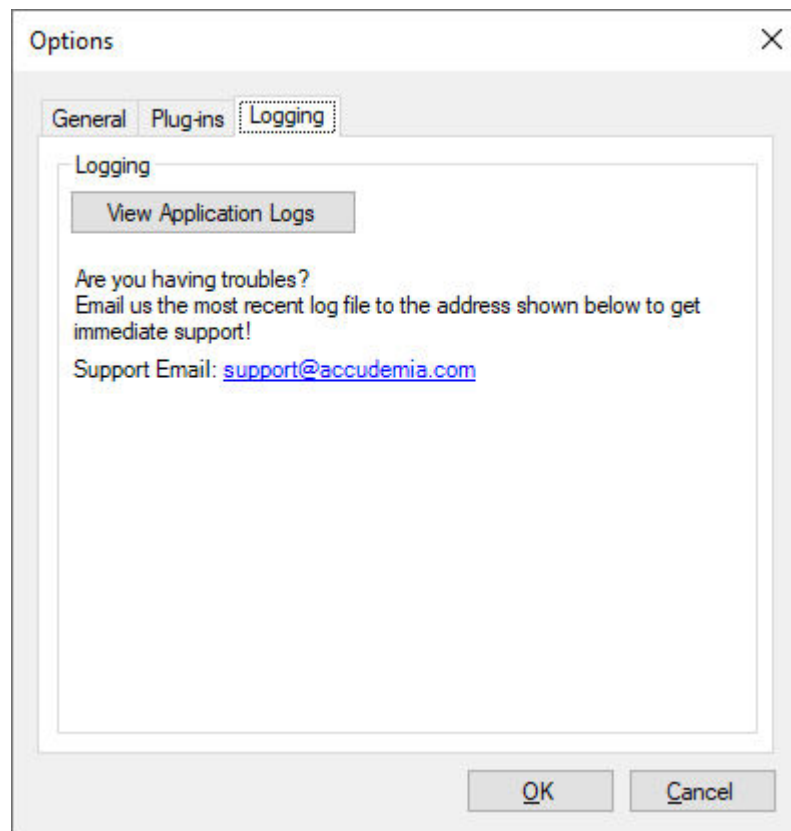
This section deals with setting up plug-ins that you have developed to integrate another system with ADX using our API. More information about this can be found here:

<https://github.com/engineerica/accudemiaext/wiki>



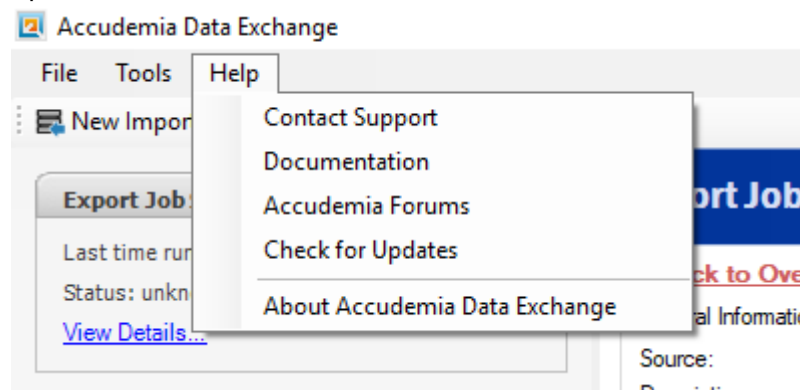
Logging Tab

This section allows you to look at the current import/export logs to find the root cause of the import failing and can be used to troubleshoot with the [Accudemia Support Team](#).



Help

In this section, we'll find helpful links to support resources, software updates, and version information.



Contact Support

This option will open an email addressed to our [Accudemia Support Team](#) in your computer's designated mail program/application such as Outlook, ThunderBird, etc.

Documentation

This option will direct you out to this guide. Congrats! You are already

here. 😊

Accudemia Forums

This link will take you out to the [Accudemia Forums](#) to search for answers to frequently asked questions, view helpful tips, and interact with other registered Accudemia clients to see how they run imports, etc.

Check for Updates (Software Updates)

This link will check if there are any updates needed.

About Accudemia Data Exchange

How do I find My ADX Version Number? When the ADX application opens it will show the exact version number of ADX you currently have installed.



To access this information once you already have the app open navigate to the **Help > About...** section in the main menu.

Troubleshooting Import Errors in ADX

Errors can occur locally on your computer or the Accudemia server when importing. All can be resolved by checking out this quick checklist of troubleshooting tips:

Import Errors on your Local Server

The errors that occur locally on your computers typically are related to the Windows User's permission, a Windows Group Policy, or network access given to the user for the file, folders, or resources that the ADX import jobs are attempting to use.

- **Cannot access the file** - This is the most common error where the user used on a scheduled import job does not have access to the file any longer.
- **Administrator Permission** - The next common error is that the user does not have elevated privileges to perform the scheduled task.
- **Password Reset Needed** - Sometimes everything looks fine on the surface. The job runs as scheduled but never makes it to the Accudemia Server. This can happen if there is a Windows Group Policy to reset your password every 3 or 6 months and the Windows User running the import job has not updated their password as required. Typically if you can set up a Windows User Account that is only a "service account" and can be setup to be excluded from these policies.

Import Errors on the Accudemia Server

Errors that can occur on the Accudemia Server are typically related to licensing issues or incomplete information being provided.

- **Failed to create new Classes** - Typical problems and solutions:
 1. **Problem: The Semester/Term does not exist in Accudemia or the information being uploaded does not match** - In other words, you are uploading "FA2021" and the system has the Term Name set to "Fall 2021".
 1. **Solution: Update the "Term Name" in the CSV files to match what is in Accudemia already or update the "Term Name" in Accudemia to match what is in the CSV files.**
 2. **Solution: You can provide more information on the import file such as the "Term Start Date" and "Term End Date".** Then the CSV file import can create the terms if they don't already exist from someone manually adding them in Accudemia. This will ensure they are created from the import process.
 2. **Problem: The Course/Subject Area and Class information are not mapped fully or correctly** - In other words, you are uploading only partial information to the system. The Courses/Subject Areas are generic but will house specific Classes each Semester.
 1. **Solution: Make sure the following** Course/Subject

Area and Class mappings are always present in your ADX import job:

- **Subject Area Name** - This is the Primary Key for the course and typically will be something like "MAT101", "MAT-101 College Algebra I", or "College Algebra I", etc.
- **Subject Area Code Prefix** - This is the first part of the code associated with the Subject Area like "ENG", "MATH", "HIST", etc. This will be combined with the Subject Area Code in the system and be displayed as "ENG-110", "MATH-1101", etc.
- **Subject Area Code** - This is the second part of the code associated with the Course like "101", "1210", "352", etc. This will be combined with the Subject Area Code Prefix in the system and be displayed as "ENG-110", "MATH-1101", etc.
- **Class Reg. Number** - This is a unique number assigned to all classes each semester that can easily identify a specific class instance and typically are like "45316", "68463", "681861", etc. This is the Class primary key from which all other information will be updated.
- **Class Short Name** - This is a unique name for the specific class instance and sometimes it can be actually quite long if you overthink it. Typically this looks like "MAT-101-01", "PSYC1202 - 68131", "ENG110-AA - English Composition I (Williams-FA2021)", etc.
- **Class Postfix** (a.k.a. Class Section Number) - This is the representation for the section number of the class instance for the semester(s) being uploaded and will look something like this "01", "02", "AA", "AB", etc. This will be combined with the Subject Area Code Prefix and Subject Area Code in the system as the Class ID and be displayed as "ENG-110-01", "MATH-1101-02", "HIST-210-AA" etc.
- **Failed to import new Students** - Typical problems and solutions:
 1. **Problem:** This can happen if you have too many students in the import file and it places the account over the licensed limit. Based on the license purchased you are limited to a certain number of active students in Accudemia.
 1. **Solution:** Use an "Import Behavior" when creating an import job in Accudemia that helps "Inactivate students that are not on the import file". By using this option, it will then allow you to import new students and inactivate those old students in the Accudemia system no longer coming over on the import CSV

files. To reactivate the students should they start to show up on future imports but were not in them at first (maybe they had not registered early or took a semester off) then you may want to create an "Active" column on the import CSV. This "Student's Active" mapping on the import job in ADX will be used to reactivate them upon import.

There could be issues in the import IF using Term information, when creating a new Term or using an existing Term we need to make sure the information on the CSV file matches the Term info on Accudemia, IF the Term name is different then Accudemia would consider it as a new Term, same is the Term coming in the file overlaps with an existing term in Accudemia

Data Missing but No Errors

The import may have passed through all of the file checks locally because it was provided all of the relevant key field mappings needed in the ADX import job for that data set, but it can still fail because the data itself may not be providing all of what is needed to make it upload properly. A perfect example is if I run these imports out of order:

1. **Students**
2. **Subject Areas/Courses**
3. **Student Enrollment**

The import jobs may pass all of the file checks and upload to the server but fail when the Accudemia website realizes the import contains enrollment data (the relationship between students and classes) but there are none of these students or courses that exist in Accudemia. This can cause an issue with enrollment uploading partially (only for those students and classes that exist). Typically this is why most institutions will choose to combine all of these imports into one file so they don't have to worry about the order they upload.

Term related Errors

Make sure to have an existing active Term in Accudemia if you are not creating one from the Import process, otherwise, you could get an error associated with this issue. If you are referencing the "Term" from the import process make sure that the "Term" name matches with the existing Term in Accudemia, (even a space or a letter can make a difference) if the Term mismatches between the import and Accudemia then the system might think you are referring to another Term that hasn't been created.

User ID issues

When configuring Accudemia, you would need to specify the Mask ID(format) for the ID you will be using for users through the system (for example 9 digits), you would need to be careful that all the user IDs(from students but also for the rest of the users) matches with that specific format; if the Mask ID in Accudemia were to be set for 9 digits and some user ID is longer than 9 digits ADX should show an error message and the import is rolled back.

[Prev.: Outlook 365 Integration](#) | [Table of Contents](#) | [Next Article - Administration: Advanced - Control Panel](#)

From:
<http://www.attendance-tracking.com/docs/> - **Engineerica Documentation**

Permanent link:
<http://www.attendance-tracking.com/docs/doku.php/accudemia/7/administrator/manual/administration/advanced/import>

Last update: **2023/08/17 14:35**

