This documentation refers to an old version of Accudemia 6.2 and has been replaced by Accudemia 7.0:
Accudemia 7.0 - Imports & Exports

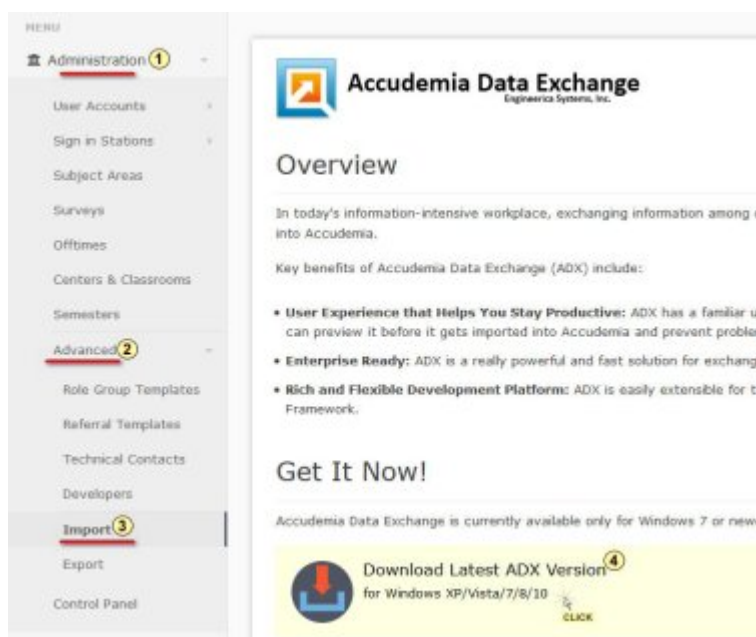# Accudemia Data eXchange (ADX) - Importing & Exporting

Import Fields Information

For more technical information and to know the limitations of each field in Accudemia, please view the ADX Fields Information page on the Accudemia developers site.

Download our Import Tool

Use ADX Accudemia Data Exchange to upload your college database. In order to start, you need to **download ADX** while logged into Accudemia under **Advanced > Import**

Downloading & Installing ADX

For help on installing or reinstalling ADX, 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 have 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 that includes all the student, classes, and registration data in it.
2. **Import via separate files:** Students data import, classes import, and class registration import.
3. **Do Incremental Import files:** These files would only have the latest updates.
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 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 order.

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** section. More information about managing **Users** and their **Security Roles** can be found here:
User Management

Before importing any users you'll want to first login as an Admin to the institution's website http://<mycollege>.accudemia.net account and setup an ID Format that will be used. Here is more information on how to set the ID format:
Setting up the ID format

Student Import

.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}

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 Adress	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	

! 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.

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 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 *	

! 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.

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 **Accudemia**.

Class Import with Schedules

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	
Subject Areas	Subject Area Code	Required	
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix	Required	Class Tertiary Key
Classes	Class's Days of Week	Required !	
Classes	Class's Start Time	Required *	
Classes	Class's End Time	Required *	
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 Accudemia'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 setup 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 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.*

Class Import without Schedules

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	
Subject Areas	Subject Area Code	Required	
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix	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.*

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	
Subject Areas	Subject Area Code	Required	

! 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

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 Code Prefix	Required	
Subject Areas	Subject Area Code	Required	
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class Postfix	Required	
Classes	Class Short Name	Required	

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.

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 ?	
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 run first a "student" import and then a "class" import like shown in the above imports. At this point I should have already created my **Students**, **Instructors** in the **Users** Table and the **Subject Areas (Courses)** & **Classes** in the database. And now since these items already exist I can simply use their **primary keys** to reference those items in the future imports. 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**

Location Imports

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

Center Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Centers & Classrooms	Center's name	Required	Center Primary Key

Classroom Import

Accudemia Table	Accudemia Field	Required for Creation	Key Field
Centers & Classrooms	Classroom's name	Required	Classroom Primary Key

Center Assignment Import

Accudemia Table	Accudemia 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
Subject Areas	Subject Area Code	Required
Terms	Term Name	Required ?

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

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.

Group Registration Import

Accudemia Table	Accudemia 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

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.)

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	
Subject Areas	Subject Area Code	Required	
Classes	Class Registration Number	Required	Class Primary Key
Classes	Class's Short Name	Required	Class Secondary Key
Classes	Class's Postfix	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 **?**	
Terms	Term's Start Date	Optional **?**	
Terms	Term's End Date	Optional **?**	

! 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.

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 files.zip

Guides for Imports

These guides try to walk your through creating special imports that may be needed or explain some complex processes.

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 does not have to be mapped if you are importing from a CSV file. The reason why it

works this way is because 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:

1. @Profile(Page=1, Question=1)
2. @Profile(Page=1, Question=2)
3. @Profile(Page=1, Question=3)
4. @Profile(Page=2, Question=1)
5. @Profile(Page=2, Question=2)
6. @Profile(Page=2, Question=3)

Also, you can use a shorter version or the header by not specifying the words "Page" and "Question", for example @Profile(1,2) for the 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 simply need to replace all the "yes" answers to "Veteran" and the "No" to "Non-Veteran" so these import into easily identifiable groups in **Accudemia**.

Tips for Importing Class Schedules

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

1. 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.
2. Start: The start time of the class, in format "h:mm tt". Valid examples are: 10:00am, 3:15pm.
3. End: The end time of the class, in format "h:mm tt". Valid examples are: 10:00am, 3:15pm.
4. 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 [MAT101 001] (45688)	Mon/Wed/Fri	11:00am	12:30pm	A-101
Algebra II	84654	002	Algebra II [MAT201 002] (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.

How to Import Student Photos

Matthew Paul

Save Changes   Cancel

General Information   Profile   Sign-In Notifications   Student Enrollment

Sign In Information

College ID: 1506017

Alternate ID/Card:

Alternate ID or Card # to login.

Password: **Set Password**

Status: ☑ Active

Change   Delete

User Information

First Name: Matthew

Middle Name: Stephen

Last Name: Paul

Do you see the guy in the screenshot above? He's the one who brings this new update to the Accudemia users. Since yesterday it's possible to import profile pictures using ADX (the import tool). Let's see how you can do this.

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 login 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.

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:

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:

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

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 login to Accudemia and your photos will be there!

Import Behaviors

This information 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 so this option is now obsolete.)
- **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.

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.

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:

1. **If both are NOT checked:** the enrollment you import is appended to the one you have in Accudemia. It 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. That means that if you import students A and B with their enrollment, Accudemia will drop the existent enrollment for those 2 students and set the one you are importing. Other students not being imported (e.g., students C and D) won't be touched.
3. **If both options are checked:** Before importing anything, all the existent enrollment for the current semester, for all the students will be dropped. Once dropped, the new data will be inserted. That means that if you import enrollment for students A and B only, other students such as C and D will end up with no classes associated.

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 Accudemia database that is not on this current import.

Just for clarification:

1. **If both are NOT checked:** the registration you import is appended to the one you have in Accudemia. It means that no drops are done at all.
2. **If only "Overwrite instructors registration" is checked:** The registration for the instructors being imported will be overwritten. That means that if you import instructors A and B with their registration, Accudemia will drop the existent registration for those 2 instructors and set the one you are importing. Other instructors not being imported (e.g., instructors C and D) won't be touched.
3. **If both options are checked:** Before importing anything, all the existent registration for the current semester, for all the instructors will be dropped. Once dropped, the new data will be inserted. That means that if you import registration for instructors A and B only, other instructors such as C and D will end up with no classes associated.

Tutor Assignments:

- **Append to current assignments** - This allows you to import a file with new tutor assignments to add to existing tutor assignments in Accudemia.
- **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 Accudemia.

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. As an example when I import a "Student Information" CSV file I only need to make sure to set the settings in the sections that are pertaining to 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**: Lists all users in the system, including some useful information such as email, address and phone number.
- **Students**: Lists all students in the system, with detailed information.
- **Tutors**: Lists all tutors in the system, with detailed information.
- **Instructors**: Lists all instructors in the system, with detailed information.
- **Classes**: Lists all classes in the system.
- **Subject Areas**: Lists all subject areas in the system.
- **Student Enrollment**: Gets all students and the classes where they are enrolled.
- **Session Logs**: Lists all session logs registered in the past, including the details of each one of them.
- **All Appointments**: Lists all appointments made in the past and in the future.

Scheduled Imports / Automated Exports

In this section you'll learn what you need to do in order to schedule imports or exports. There are some prerequisites that we'll review as well in order 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 (**A**ccudemia **D**ata e**X**change).
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 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 in the future.
16. **Last 7 Days Appointments** - Lists all appointments made in the last 7 days.

Once these are complete you should be able to schedule your import / export as explained below:

- Schedule Imports / Exports in ADX (**A**ccudemia **D**ata e**X**change).

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 **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. Click next when done.

Note: Exports will not have this step.

Step 4: Then it shows you the results of what it found to import, click on them to see what its pulling, 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 need to automate it.

Step 1: Start by clicking "view details" on left column under the import job and then under schedule "Enable "

Step 2: Then click the "new" button and setup your reoccurrences. Click "OK".

Step 3: You should see the automated task setup to go for you and click "ok" and done.

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 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 in 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 credentials of the user currently logged into the ADX application to accudemia.net but take 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:

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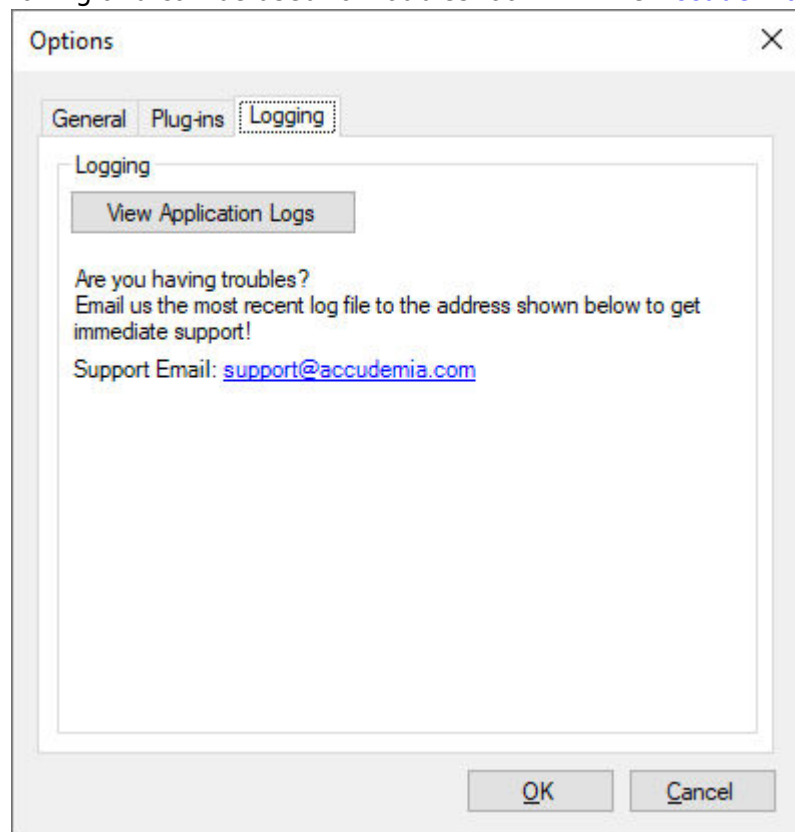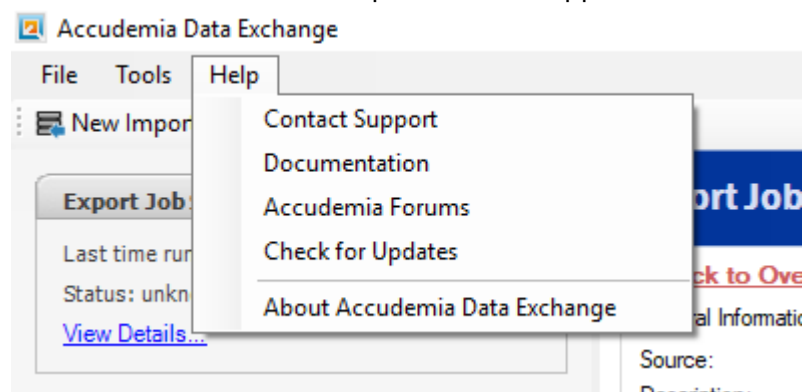https://github.com/engineerica/accudemiaext/wiki

Logging Tab

This section allows you 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 Community Forums

This link will take you out to the Accudemia Community 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 that are any updates needed

About Accudemia Data Exchange

How do I find My ADX Version Number? This link will show the exact version number of ADX you currently have installed.

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