Bulk Data Update in FACTS with Excel

Summary

1 Introduction

FACTS Grid Edit allows the user to update many student fields at a time. This process includes the "copy-paste" step of each data from source documents to the corresponding cell on the Grid Edit page. To check this feature, please visit this hubhelp link for reference.
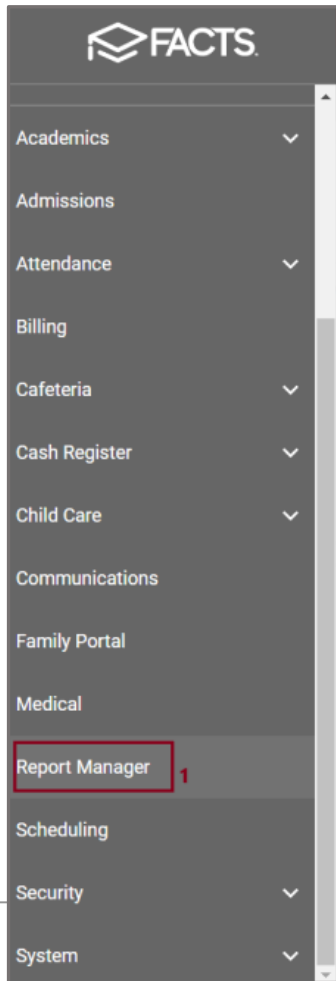
To further automate the data updating, EduWeb Group developed an import tool that updates (record and delete) multiple fields within the SIS using an excel template. It covers some of the fields in the "Person ID" table for staff, students, and families. Other fields that are specific to each person type like the UDID for students only are in a separate import tool.

Below are the fields that can be updated with this customization:

Fields table person					
BirthCity	Deceased	Doctor	Gender	MaritalStatus	Staff
BirthCountry	Denomination	DoctorAddress	HomePhone	MedicalNote	Student
Birthdate	Dentist	DoctorPhone	Hospital	MiddleName	Subdivision
Birthplace	DentistAddress	DriversLicense	HospitalAddress	NickName	Suffix
BirthState	DentistPhone	EducationLevel	ImportID	Note	Treat
BloodType	Directory_BlockAddress	Email	InsuranceCompany	Occupation	WorkCity
CellPhone	Directory_BlockCellPhone	Email2	InsuranceGroup	Parent	WorkCityStateZip
Citizenship	Directory_BlockEmail	Ethnicity	InsurancePolicy	PrimaryLanguage	WorkCountry
Company	Directory_BlockHomePhone	Fax	JobCategory	Salutation	WorkPhone
CountryCode	Directory_BlockName	FirstName	LastName	SSN	

This document covers the step-by-step on how to use the "Person ID Import Tool". The "**RCK: UpdatePersonByPersonID**" tool must be installed first (by EduWeb) on FACTS Database for this operation to work.

2 How to use the import tool

1. From FACTS main menu, click on Report Manager

Report Manager ❓

Category

- Favorites ★
- Academics
- Accounting
- Activity Logs
- Administration **2**
- Admissions
- Attendance
- Behavior
- Child Care
- Class
- Course
- Create A Report
- Custom
- Directory
- Donate Online
- Gradebook
- Lunch
- Medical
- Products & Services
- Schedules
- Staff
- Student
- Textbook
- Training & Documentation
- Transportation

Reports

- Picture IDs (50 Max)
- Picture IDs - Staff
- Picture IDs - Student
- Pre-Progression Status Report
- RCK: Parents_Text_SMS
- RCK: Parents_Text_SMS_ExpertTexting
- RCK: staff_sms
- RCK: staff_sms_ExpertTexting
- RCK: UpdatePersonByPersonID **3**
- Remove Family Service Hours
- Remove Student Service Hours
- Revision History
- Service Ticket Status
- Staff Expired Password
- Staff Members Missing Usernames
- Student Alerts - Active
- Student Archive Report
- Student Bus Routes
- Student Pick Up List
- Student Recognition (Cumulative)
- Student Recognitions this year
- Students Missing Usernames
- Survey Analysis
- Update Next Status
- Update Time Zone
- Year and Term Report

[Add to Favorites]

2. Administration

3. Click on RCK: UpdatePersonByPersonID

Report Manager ?

Training & Documentation
Transportation

Update Time Zone
Year and Term Report

Add to Favorites

4. Click on "View Report"

Year
2021-2022

Term
Sem 2

From
06/29/2022

To
06/29/2022

○ Status
○ Homeroom
○ Class
○ Activity
○ Admissions

Filter
☐ District Wide
☐ Next Year

-ALL-
Dual-Enrolled
Enrolled
Graduate
Inactive

Conditional Acceptanc
ESL/ELL
ESL/LS
Grade: 09
Grade: 10

Selection List
Abbas, Yousef
Abdalla, Lina Sherif Salah Ran
Abdalla, Mohamed Yasser
Abdelkafi, Lina Rami
Abdellatif, Haya Sherif
Abdelrahman, Hana Khaled
Abdelrehem, Hana
Abdul Jawad, Layan
Abdul-Baqi, Ayesha
Abouseree, Seif
Abu Awwad, Jana Zakareya
Abu Ghazaleh, Haya Rami
Abu, Sarah Abdihamid
Abuelkhier, Mohamed Ahmed
Abukhudair, Rowayan Walid
Adil Paracha, Imaan
Adnan, Omar
Afandi, Cedra Omar
Ahmed, Mahmoud Ehab
Ahmed, Yousef Mohamed

Records: 293

>
>>

<
<<

Selected List

Records: 0

Advanced Filter

View Report   4

Print PDF

[Download model file] 5

Choose File | No file chosen

Subir Archivo

5. Click on "Download model file" to download the excel template

6. Configure the "Sheet1" which is the upload sheet of this file.

personID – this identifies which contact you are updating. For students, this is the "*Student ID*"; staff is "*Staff ID*"; and family – "*Family ID*". In demographics, this is greyed out Person ID field.

For exporting the person IDs, you can use the "Create A Report" in Report Manager.

7. "Variables" sheet contains the fields that can be updated.

Note: You can add fields to be updated as column headers **EXACTLY** the same as how it is in the Variables sheet.

8. Date Format – use the same date format set in your FACTS database.

9. Delete an existing data – add the "**'--CLEAN UP--**" to delete the specific field record.

If the field is empty, it would not update or delete the existing record.

Download model file

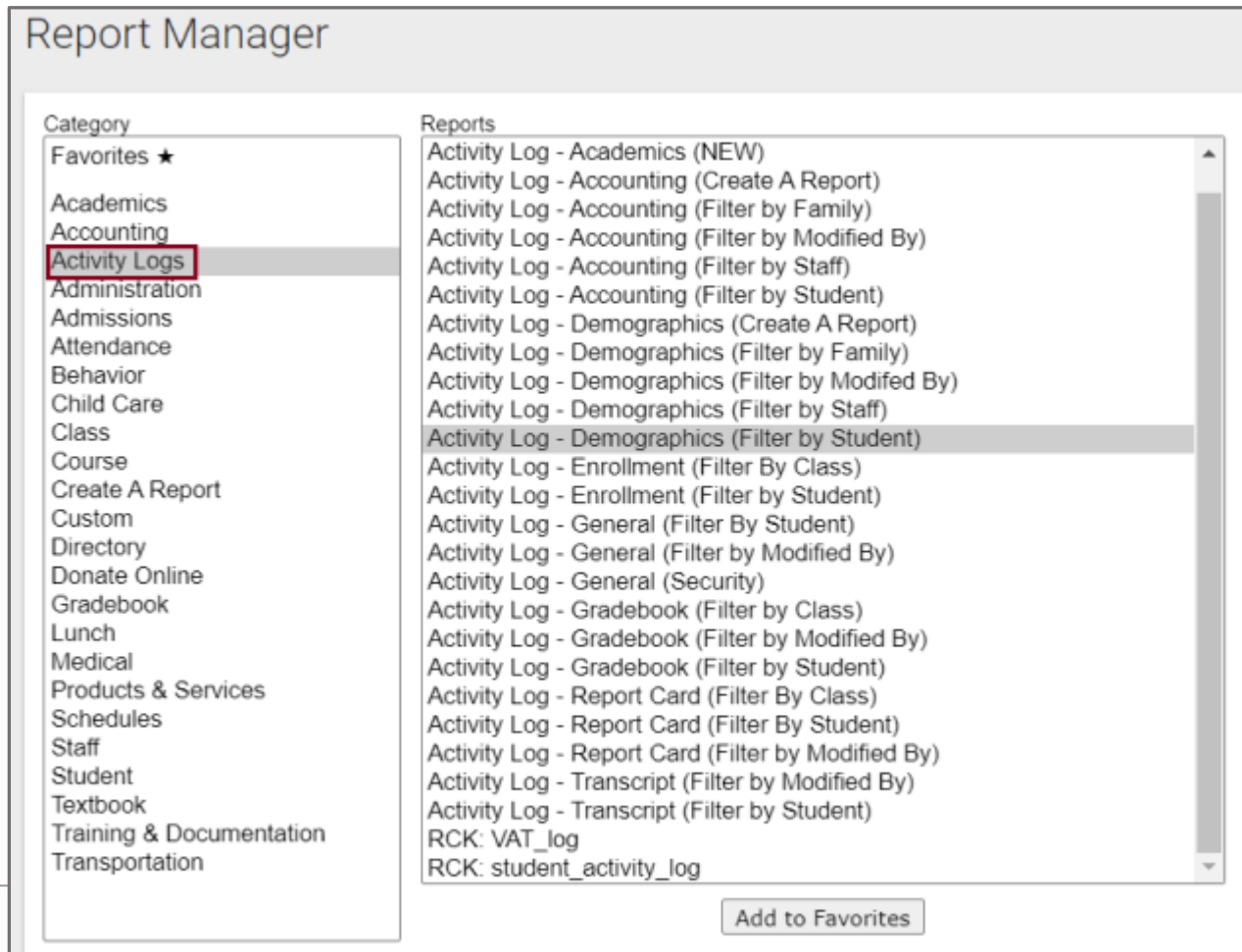Choose File | update_pers…ersonID.xlsx

10

Subir Archivo

11

10. Back to FACTS, click on "Choose File"

11. Upload

struct (ordered)

1215193   struct (ordered)

    EMAIL2   ali@gmail.com
    NICKNAME   Alice

1211725   struct (ordered)

    BIRTHDATE   2014-09-22 00:00:00.0
    EMAIL2   nam@hotmail.com
    NICKNAME   --CLEAN UP--

personID	FirstName	LastName	BIRTHDATE	EMAIL2	NICKNAME	Update
1215193	Alia	Abdelbade		ali@gmail.com	Alice	OK
1211725	Noah	Abdelbade	2014-09-22 00:00:00.0	nam@hotmail.com	--CLEAN UP--	OK

The confirmation page will show with the "Update" Status.

3 Activity Log

Changes made through this import tool are recorded in Report Manager > Activity Logs

Activity Log - Demographics

Date Range: 06/29/22 To 06/29/22

LogID	Type	Field	Data	Note	Person	Person ID	Modified By	Modified Date and Time EST
221235	Update Person	EMAIL2	EMAIL2 = Sample@gmail.com	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 11:33:00 EST
221236	Update Person	EMAIL2	EMAIL2 = test@hotmail.com	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 11:33:00 EST
221237	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 11:36:00 EST
221238	Update Person	NICKNAME	NICKNAME = Ali	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 11:36:00 EST
221239	Update Person	EMAIL2	EMAIL2 = nam@hotmail.com	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 11:36:00 EST
221240	Update Person	NICKNAME	NICKNAME = Nam	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 11:36:00 EST
221241	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 11:39:00 EST
221242	Update Person	NICKNAME	NICKNAME = Alice	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 11:39:00 EST
221252	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 12:58:00 EST
221253	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 13:00:00 EST
221254	Update Person	NICKNAME	NICKNAME = Alice	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 13:00:00 EST
221255	Update Person	EMAIL2	EMAIL2 = nam@hotmail.com	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 13:00:00 EST
221259	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:11:00 EST
221260	Update Person	HOMEPHONE	HOMEPHONE = 8415215	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:11:00 EST
221261	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 13:12:00 EST
221262	Update Person	NICKNAME	NICKNAME = Alice	ByUpdateFromExcel	Alia Abdelbade	1215193	, (-104442)	06/29/2022 13:12:00 EST
221263	Update Person	EMAIL2	EMAIL2 = nam@hotmail.com	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 13:12:00 EST
221264	Update Person	NICKNAME	NICKNAME =	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-104442)	06/29/2022 13:12:00 EST
221268	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:18:00 EST
221269	Update Person	HOMEPHONE	HOMEPHONE = 8415215	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:18:00 EST
221270	Update Person	NICKNAME	NICKNAME = ?????? ??????	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:18:00 EST
221274	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	Noah Abdelbade	1211725	, (-976)	06/29/2022 13:18:00 EST

Activity Log Demographics

Display Setup

[10 ▾] Field Count
[1000 ▾] Max. Records Returned
☑ Hide Filter #2

Checklist
☑ Demographics
* Denotes a category which could have multiple entries per main record.

[Refresh]

Restore Configuration

My Templates: [▾] [Restore] [Save] [Delete]

Shared Templates: [▾] [Restore]

New Template: [   ] ☐ [Save]

	Display Fields		Filter #1	Parameter #1	Pre-Load	Hide	Sort Order	Sort	Format	Alignment	Summary
Field #1	Type	▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #2	Field	▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #3	Data	▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #4	Note	▾	= ▾	ByUpdateFromExcel	☐	☐	▾	▾	▾	▾	▾
Field #5	Person ID	▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #6	Modified By	▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #7	Modified Date/Time	▾	▾		☐	☐	▾	Asc ▾	▾	▾	▾
Field #8		▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #9		▾	▾		☐	☐	▾	▾	▾	▾	▾
Field #10		▾	▾		☐	☐	▾	▾	▾	▾	▾

[View Report]

Another approach to check is going through the Report Manager > Activity Logs > Activity Log – Demographics (Create A Report) > then set the Note filter to **"ByUpdateFromExcel"**

Activity Log Demographics: Create-a-Report

	Type	Field	Data	Note	Person ID	Modified By	Modified
1.	Update Person	CELLPHONE	CELLPHONE = 966500053617	ByUpdateFromExcel	1214325		06/29/2022 12:19:00
2.	Update Person	NICKNAME	NICKNAME = Pepito Grillo	ByUpdateFromExcel	1214325		06/29/2022 12:19:00
3.	Update Person	CELLPHONE	CELLPHONE = 966500053617	ByUpdateFromExcel	1214325		06/29/2022 12:58:00
4.	Update Person	EMAIL	EMAIL = pepe@pepe.es	ByUpdateFromExcel	1214325		06/29/2022 12:58:00
5.	Update Person	NICKNAME	NICKNAME = Pepito Grillo	ByUpdateFromExcel	1214325		06/29/2022 12:58:00
6.	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	1211725		06/29/2022 12:58:00
7.	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	1215193		06/29/2022 13:00:00
8.	Update Person	NICKNAME	NICKNAME = Alice	ByUpdateFromExcel	1215193		06/29/2022 13:00:00
9.	Update Person	EMAIL2	EMAIL2 = nam@hotmail.com	ByUpdateFromExcel	1211725		06/29/2022 13:00:00
10.	Update Person	CELLPHONE	CELLPHONE = 966500053617	ByUpdateFromExcel	1214325		06/29/2022 13:11:00
11.	Update Person	EMAIL	EMAIL = pepe@pepe.es	ByUpdateFromExcel	1214325		06/29/2022 13:11:00
12.	Update Person	NICKNAME	NICKNAME = Pepito Grillo	ByUpdateFromExcel	1214325		06/29/2022 13:11:00
13.	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	1211725		06/29/2022 13:11:00
14.	Update Person	HOMEPHONE	HOMEPHONE = 8415215	ByUpdateFromExcel	1211725		06/29/2022 13:11:00
15.	Update Person	EMAIL2	EMAIL2 = ali@gmail.com	ByUpdateFromExcel	1215193		06/29/2022 13:12:00
16.	Update Person	NICKNAME	NICKNAME = Alice	ByUpdateFromExcel	1215193		06/29/2022 13:12:00
17.	Update Person	EMAIL2	EMAIL2 = nam@hotmail.com	ByUpdateFromExcel	1211725		06/29/2022 13:12:00
18.	Update Person	NICKNAME	NICKNAME =	ByUpdateFromExcel	1211725		06/29/2022 13:12:00
19.	Update Person	CELLPHONE	CELLPHONE = 966500053617	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
20.	Update Person	EMAIL	EMAIL = pepe@pepe.es	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
21.	Update Person	NICKNAME	NICKNAME = Pepito Grillo	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
22.	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	1211725		06/29/2022 13:18:00
23.	Update Person	HOMEPHONE	HOMEPHONE = 8415215	ByUpdateFromExcel	1211725		06/29/2022 13:18:00
24.	Update Person	NICKNAME	NICKNAME = ?????? ??????	ByUpdateFromExcel	1211725		06/29/2022 13:18:00
25.	Update Person	CELLPHONE	CELLPHONE = 966500053617	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
26.	Update Person	EMAIL	EMAIL = pepe@pepe.es	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
27.	Update Person	NICKNAME	NICKNAME = Pepito Grillo	ByUpdateFromExcel	1214325		06/29/2022 13:18:00
28.	Update Person	CELLPHONE	CELLPHONE = 966500053620	ByUpdateFromExcel	1211725		06/29/2022 13:18:00
29.	Update Person	HOMEPHONE	HOMEPHONE = 8415215	ByUpdateFromExcel	1211725		06/29/2022 13:18:00
30.	Update Person	NICKNAME	NICKNAME = ?????? ??????	ByUpdateFromExcel	1211725		06/29/2022 13:18:00

---END---