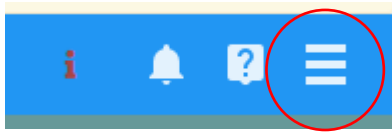


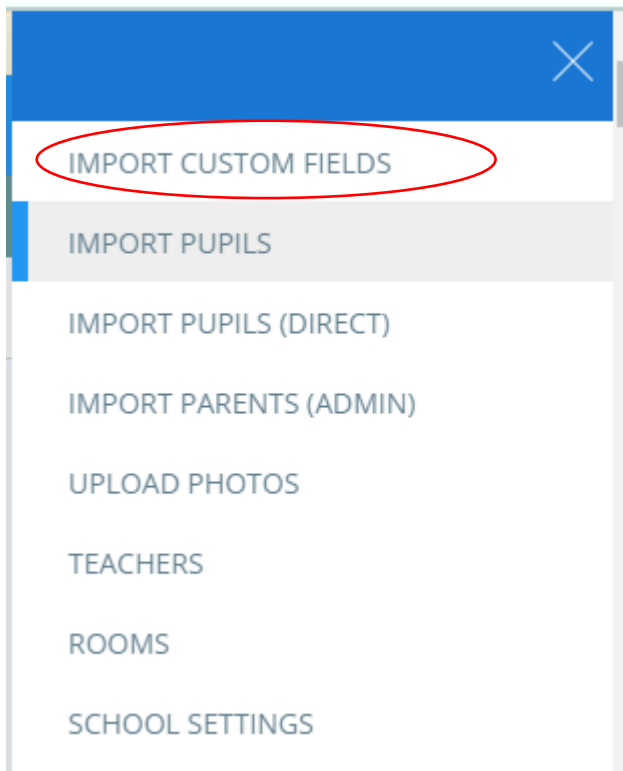


Custom Field Upload Guide

1. Click the 3 Lines in the top right-hand corner.



2. Select 'Import Custom Fields'



3. You should then see the Import Custom Field Page, click '**Choose File**' to select the spreadsheet you want to upload. *(Before you do this it is important to check that the spreadsheet reaches all the check list requirements, as if not it can cause the import to fail).*

Import custom fields

This page will allow you to import custom fields/assessment data for pupils currently in your account. You are not able to add any additional pupils using this tool. Please follow the below steps to ensure your data is imported correctly. For further information please read through this guide.

Check list:

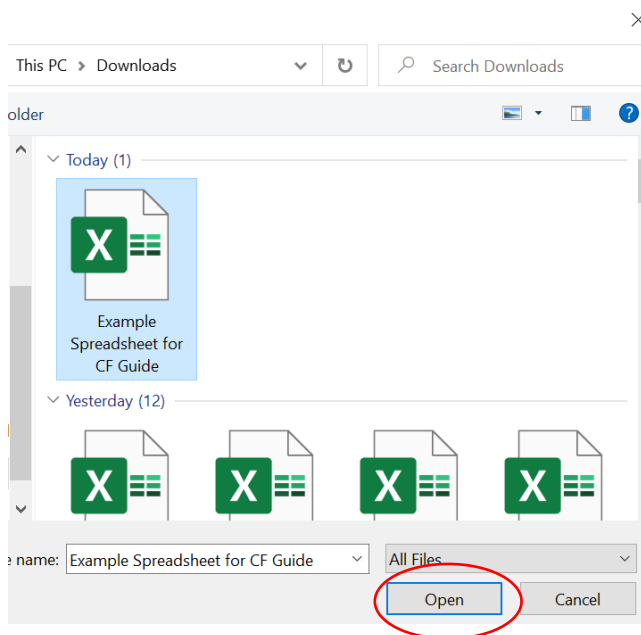
- Download the example spreadsheet
- Export data from your MIS/third party (e.g. SIMS, Target Tracker) into a spreadsheet
- Edit the export to match our example spreadsheet - there must only be **ONE** sheet in the spreadsheet
- Check the data and ensure there is only **Pupil ID** and **custom fields** that you wish to import
- If there are duplicate Pupil rows, the **last** row will take precedence
- Ensure there are no blank fields as this will cause the import to fail
- Upload your spreadsheet

No file chosen

Resources

- [Knowledgebase](#)
- [Download spreadsheet template](#)

4. Select the spreadsheet you want to upload and Click 'Open'.



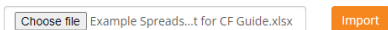
5. Once you have selected the file click the **Import** Button.

Import custom fields

This page will allow you to import custom fields/assessment data for pupils currently in your account. You are not able to add any additional pupils using this tool. Please follow the below steps to ensure your data is imported correctly. For further information please read through this guide.

Check list:

- Download the example spreadsheet
- Export data from your MIS/third party (e.g. SIMS, Target Tracker) into a spreadsheet
- Edit the export to match our example spreadsheet - there must only be **ONE** sheet in the spreadsheet
- Check the data and ensure there is only **Pupil ID** and **custom fields** that you wish to import
- If there are duplicate Pupil rows, the **last** row will take precedence
- Ensure there are no blank fields as this will cause the import to fail
- Upload your spreadsheet



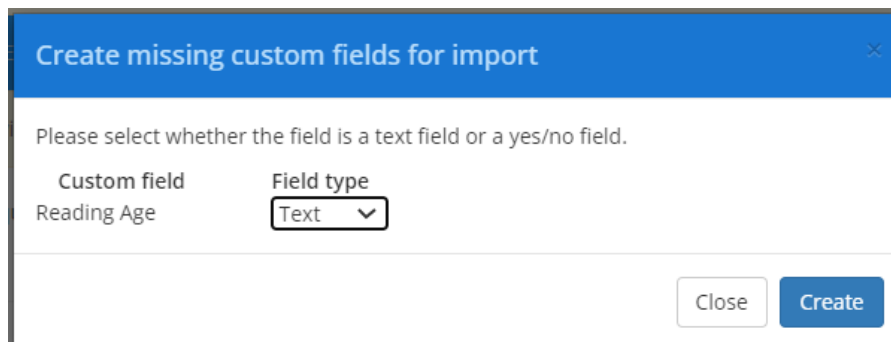
6. It should then bring you to the Import page where you can see the data you are trying to upload. (If a field is highlighted in blue this means that it's a new custom field that needs to be added before proceeding. To do this, click 'Create Missing Custom Fields').

■ custom field needs to be added ■ no pupil record found ■ missing data which is required

Only show rows with errors

Pupil	Reading Age
Y820200109033 Chris Aaron (11A)	12
J820200109032 Liz Aaron (11C)	12

- When you have clicked **'Create Missing Custom Fields'** you will then need to choose the **'Field Type'** this is when you decide whether you want the Custom Field as a **'Text'** Field or a **'Yes/No'** field. When you have decided click the **'Create'** button on the bottom right of the pop-up.



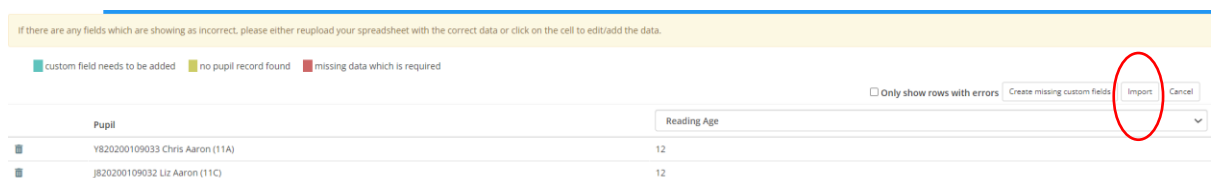
Create missing custom fields for import

Please select whether the field is a text field or a yes/no field.

Custom field	Field type
Reading Age	Text

Close Create

- When you have clicked **'Create'** the pop-up will disappear. If you are happy with how everything looks Click the **'Import'** Button in the top right hand corner.



If there are any fields which are showing as incorrect, please either reupload your spreadsheet with the correct data or click on the cell to edit/add the data.

custom field needs to be added no pupil record found missing data which is required

Only show rows with errors Create missing custom fields Import Cancel

Pupil	Reading Age
Y820200109033 Chris Aaron (11A)	12
J820200109032 Liz Aaron (11C)	12

- Once you have pressed **'Import'** you should see the following screen, this means that the import is complete.

The custom fields have been updated for the following pupils:

- Chris Aaron (11A)
- Liz Aaron (11C)

Things to take into account.

When you have completed the Import, you will then need to set up your Custom Fields so that they appear on your pupil cards etc. To do this follow the guide below:

<https://edukey.uservoice.com/knowledgebase/articles/1904710-how-to-create-a-custom-field>