



Add Individuals

This guide will assist you with manually adding and uploading rosters into 5-Star Students

- ✓ Manually adding individuals
- ✓ Determine which information will be imported
- ✓ Deactivating individuals who no longer attend the school
- ✓ Updating individual profiles with new information
- ✓ Viewing previous imports

Manually Add Individuals

The system supports managing 6 different lists of individuals:

- Students
- Faculty/Staff
- Community members
- Groups
- Guests
- No Privileges

Choose **People** from the icon menu, then select **Students** to navigate to the students page. Click the **Add** button at the top of the list.

👤 Add Student ← back to list 2018/2019 🏠 > People > Add Student

▲ Need to add multiple students? Go to [Import from file](#) page

*** REQUIRED FIELDS**

ID Grade

First name Last name

Grade: -- choose grade --

Buttons: Add Student Cancel

+ ADDITIONAL OPTIONS

Secondary ID

Middle name Nickname

Gender Birthdate

Address 1 Address 2

Manually adding students or other individuals is simple, but it can be time consuming. This method is adequate if you only need to add a few students for example.

* Guests cannot be added individually. Please consult the **Managing advance sale ticket lists** section of this guide for more information on adding guests to ticketed events

Import Individuals

The best method for adding individuals is to import them from a file. You can import an entire student roster, the staff list or a file of community members in just a few steps.

Choose **People** from the icon menu, then select **Import Individuals**

Import Individuals

2018/2019

People > Import Individuals > From File

1. INDIVIDUAL TYPE

Students

2. CHOOSE FILE

Select file...

Supported file types: Microsoft Excel (.xls/.xlsx), text (.txt), comma-delimited (.csv)

Did you know?

Import a file containing students, staff or community members. You can update existing individual details at any time by importing a new file

An ID field must be included in each row. This is to ensure that individuals are correctly added or updated on the system, based on a unique identifier

View the list of [field types](#) you can use when importing individuals

You can import files saved in Microsoft Excel (**.xls** /**.xlsx**) formats, comma-delimited (**.csv**) files, or text (**.txt**) files. Make sure to review the instructions available on this page, prior to preparing your file.

Required data elements are **ID, Last Name, First Name, and Grade** (for students). Gender is optional but often helpful for reporting and voting scenarios.

Once your file is prepared, select the appropriate person type and click the **Select file...** button. After file selection and validation, your file will be uploaded to 5-Star Students servers. When importing an Excel file, select the spreadsheet that contains the data when prompted.

Next, you'll be able to see some of the data in your file. For each column, select the correct field type at the top (e.g. ID, Last Name, First Name, Gender). You don't have to use *every* column in your file, just leave the field type set to (**skip field**) on the columns to ignore.

If the first row in your file contains column headings or descriptions, make sure to select "Yes" for that option to ignore the row during processing.

If a file has already been uploaded into the program, you can choose to **"deactivate"** any individuals that are not in the new file. For example, if a student withdrew from the school and is no longer on the active roster being uploaded into 5-Star, the program will recognize those individuals and remove them from the

active roster based on their ID number. This action will remove them from the active roster, but will save their data in case they return to the school and are reactivated.

You can find the deactivated individuals on the student roster page by click on the Inactive tab.

Import Students

CHOOSE OPTIONS

Does first row have column descriptions? **No** ?

Find existing individuals: **Match on ID** ?

Deactivate individuals not in file? **No** ?

Match Columns

432 records (displaying first 5 rows only)

| (skip field) |
|--------------|--------------|--------------|--------------|--------------|------------------|
| FirstName | LastName | ID | Gender | Grade | Address |
| Anna | Adams | 10013 | F | 10 | 3790 Nw 167th St |
| Damian | Adell | 10209 | M | 11 | 5784 Hellyer Ave |

When importing a list of individuals, the “Match on...” option will determine whether the system searches for an existing person based on their primary ID or secondary ID number. Click the **question mark** icon for more details on this option. You can import new files as often as you need to. The program will automatically update student profiles with the newest information. **You do NOT need to remove students before uploading a new file.**

After field matching is done and other options have been set, click the **Process File** button. You’ll be routed to another page to monitor file processing progress and results.

File History 2018/2019 People Import Individuals File History

This page will update automatically every 30 seconds. Or, click  icon in lower right corner of grid to get the latest file import status

	Date	Status	Type	File type	Fields	Added	Updated	Deactivated	Warnings
	9/27/2018	Completed	Students	Excel		0	431	0	0
	9/18/2018	Completed	Students	Excel		281	1007	0	3
	9/7/2018	Completed	Students	Excel		69	1219	0	3
	9/5/2018	Completed	Students	Excel		0	431	0	0

File Import History

On the **File Import History** page, you'll see a summary of the individuals added or updated, along with any warnings. If the file is still processing, you may need to click the refresh icon periodically to view the latest status.

Based on the ID or secondary ID column you selected in the file, the system will attempt to locate an existing individual with that ID number. If found, the other selected columns in the file will be used to *update* that individual's profile. If no match is found, the system will *create* a new record for the individual. Having the proper ID number in the file is critical to avoiding duplicate records for the same person. You may import lists of students or other individuals as often as needed to add new records or update existing profile information (e.g. birthdate, email address, homeroom). The system will properly apply updates or add new individuals as needed.

View Individuals

After adding or uploading students to the roster, you can view the roster and information by navigating to the **People** section and click on *Students*. Only Managers, Users, and Viewers have access to the student roster and any student information.

The table will display the star level, points, name, ID number, grade, and gender. You can use the filter icon in any of the columns to organize or search for specific information. You can also use the filter icon to view additional columns.

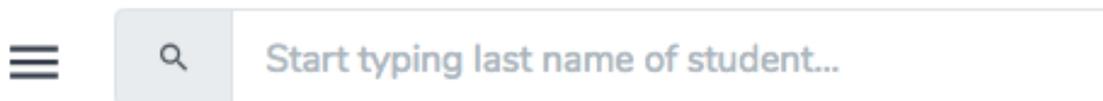
To view more information about a specific student, click on the arrow next to their name. A drop down menu will appear with their involvement details. The flags in the last column represent the different lists a student may be on. The red flag is the No Privileges list and the blue flag symbolizes that the student has an Activities Card.

Level	Points	Last name	First name	ID	Grade	Group		
★★★★★	40	Abe	Kyle	109684	10	none	 	

Points	Redemptions	Activities	Events	Behaviors	Interests	Surveys	Voting	Profile
Period	Points	Guest Points	Total Points	Gray Points	Gray Guest Points	Total Gray Points		
2018/2019	40	0	40	50	0	50		
1st Semester	30	0	30	50	0	50		
Spirit Week	30	0	30	50	0	50		

Student Search

To search for a specific student, you can use the filters from the student roster or use the search bar at the top of any page in 5-Star.



After searching for a student, you will be directed to their “involvement profile” page. This will breakdown all of the student’s involvement throughout the different school years.

You can manage their reward redemptions, activity participation, and behavior occurrences from this page. You can also view their last 5 check-ins for both events and interventions.

The page will also include their surveys and voting history, as well as their student profile information.

To print out a point summary report, click the **Point Breakdown Report** button at the top of the page. This report will display all of the activities, events, behaviors, and interventions that the individual participated in that was assigned a point value. It will display the point totals for the entire school year and any recognition periods if applicable.