

PIMS Access DB – Copy Process

Copying from Student into Student Snapshot in a Single Collection Period

1. From the main menu, click the Copy Data button.
2. Make sure the school year for both the "copy from" and "copy to" sections is the same.
3. Make sure the reporting period for both the "copy from" and "copy to" sections is the same
4. Under the "template name" section, make sure Student Snapshot has an X in the box
5. Under the "snapshot data source" section, make sure Student to Student Snapshot has an X in the box
6. Click the Copy Data button

Notes

1. This copy functionality will only copy records from Student whose Student ID does not already exist in Student Snapshot. Thus, if a particular student record already exists in Student Snapshot for any collection period, it will be skipped during the copy process.
2. The copy process NEVER overwrites or updates records. It only inserts new, unique records into the snapshot table.
3. A record in the source table can be copied once and only once to the snapshot table.
4. During the copy process, the snapshot date associated with the “copy to” collection period will be added to the record inserted into the snapshot table.
5. To copy Staff to Staff Snapshot, follow the same procedure as above, but substitute “Staff” for “Student” and “Staff Snapshot” for “Student Snapshot” in the instructions.

Copying Data from One Collection Period to another Collection Period

1. From the main menu, click the Copy Data button
2. Set the school year values appropriately in the "copy from" and "copy to" sections
3. Set the reporting periods appropriately in the "copy from" and "copy to" sections
4. Under the "template name" section, make sure any templates that need to be copied have an X in the box
5. Under the "snapshot data source" section, make sure NOTHING has an X in the box
6. Click the Copy Data button

Notes

1. For snapshot tables, this copy functionality will copy all records with a snapshot date associated with the “copy from” collection period, and insert these records

- into the same table with the snapshot date associated with the “copy from” collection period.
2. For other tables, this copy functionality will only copy records from a table whose key fields do not already exist in the same table. This means that the copy functionality will have no effect on some tables, when copying from period to period within a single school year. Student and Staff fall into this category.
 3. The copy process NEVER overwrites or updates records. It only inserts new, unique records into tables.
 4. Usually, “copy from” will be the immediately previous collection period, and “copy to” will be the current collection period. However, in some instances this may not be the case. For example, no student data is collected in January, so when doing the copy function on the student snapshot table for the March collection, the “copy from” period would be December and the “copy to” period would be March.

ESPP Import and the Copy Function

1. Perform the ESPP import as instructed in the manual
2. Populate all additional required and requested fields in the Staff template
3. Use the instructions above to copy the data from Staff to Staff Snapshot

General Usage of the Copy Function Going Forward

1. Perform a period-to-period copy function for Student Snapshot and Staff Snapshot to populate the current snapshot
2. If necessary, update the existing records in Student, Student Snapshot, Staff and Staff Snapshot
3. Enter new records in Student and Staff
4. Perform a Student to Student Snapshot copy function to bring the new records into the current snapshot
5. Perform a Staff to Staff Snapshot copy function to bring the new records into the current snapshot