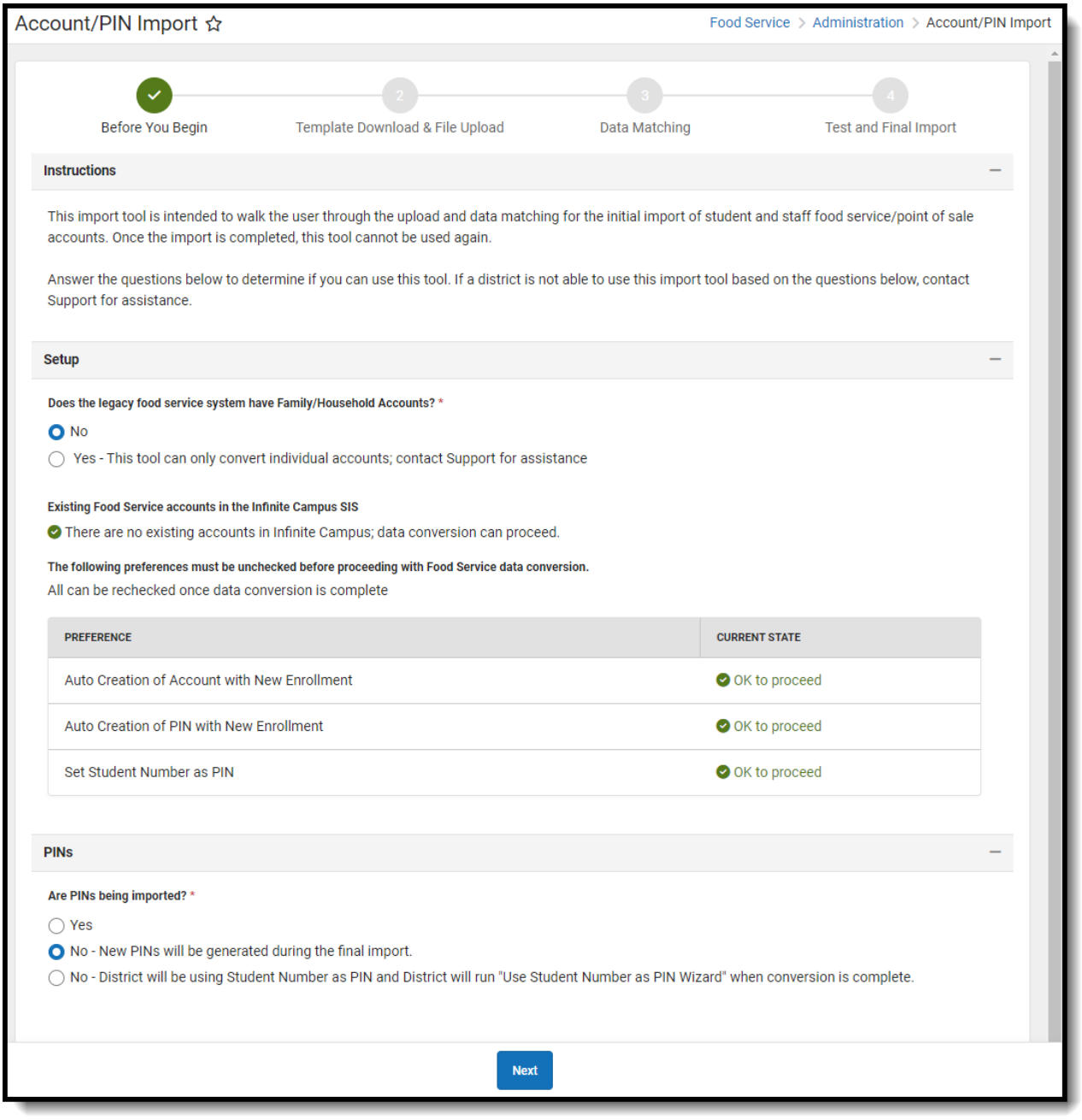
Account/PIN Import

Last Modified on 06/23/2026 8:52 am CDT

To ensure a successful upload process, it is recommended that users complete the import one to two weeks before the Food Service accounts will be utilized and before the first transactions, including deposits, are made. This lead time will give you enough time to contact Campus support if you have any issues.

The Account/PIN Import tool uploads and matches data for the initial import of student and staff Food Service/POS accounts. Users are finished when all four steps are completed.



See the Account/PIN Import Tool Rights article for information about rights needed to use this tool.

Before You Begin

Once the import is completed and Food Service accounts have been created, this tool cannot be used again.

The Before You Begin setup asks questions and provides a series of checks to ensure that your district can use Account/PIN Import without any assistance from Infinite Campus Support. If a legacy food service system used family or household accounts, users cannot proceed to the next step of Account/PIN Import. They will need to contact Campus Support to have their data imported.

The Existing Food Service accounts in the Infinite Campus SIS is a field that assures there are no food service accounts in Campus.

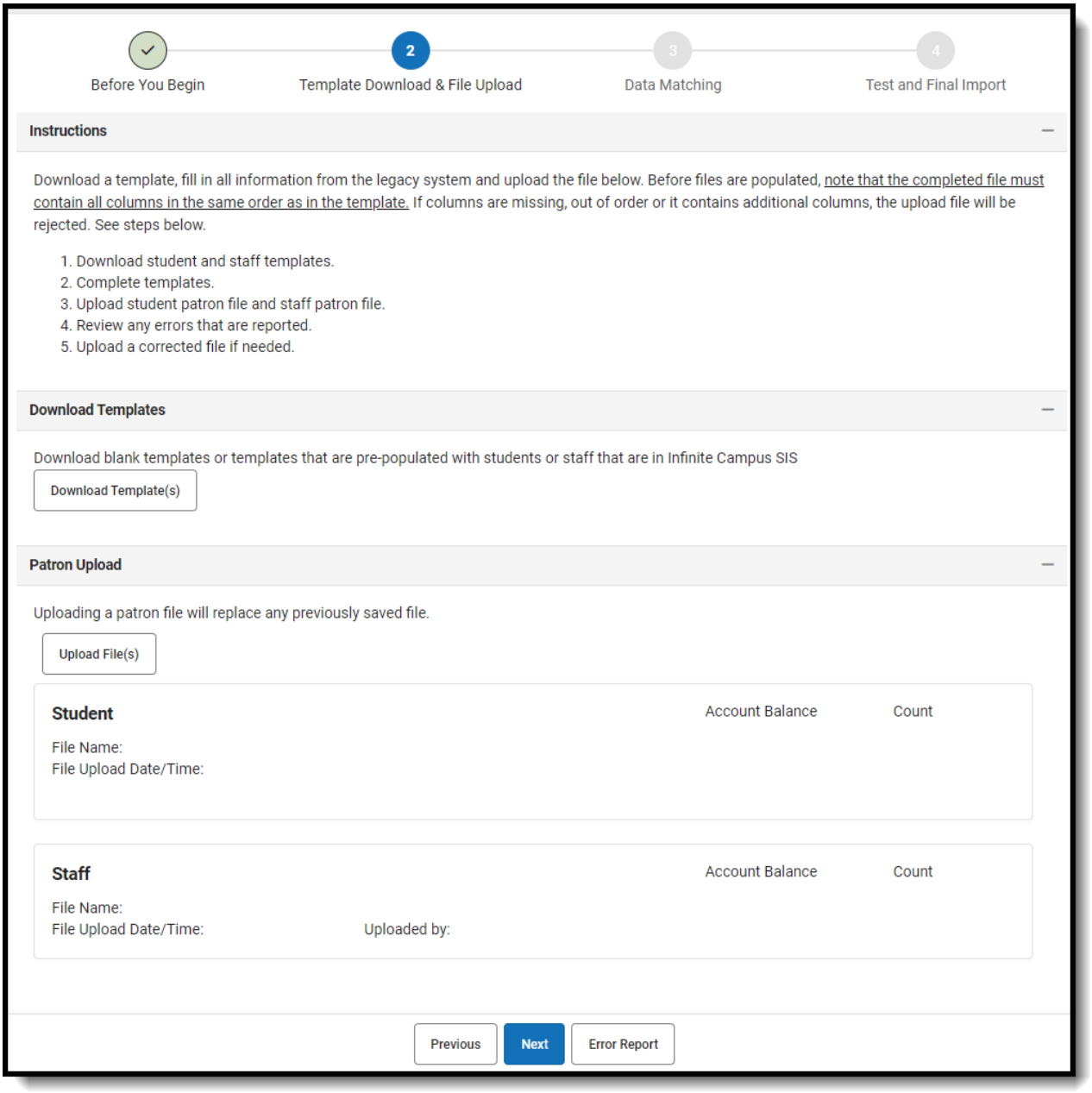
Three preferences, found in Food Service > Setup > General Preferences, must be unchecked before proceeding. When unchecked, their state will appear as "OK to proceed" with a green checkmark. Once the Food Service/Point of Sale data conversion is complete, these preferences can be rechecked.

Select one of the options from Are PINs being imported:

- Yes - PINs will be included in the template file uploaded in step 2.
- No - New PINs will be generated during the final import.
- No - The district will use Student Numbers as PINs and the District will run "Use Student Number as PIN Wizard" when conversion is complete.

Click **Next** when all requirements are met.

Template Download & File Upload



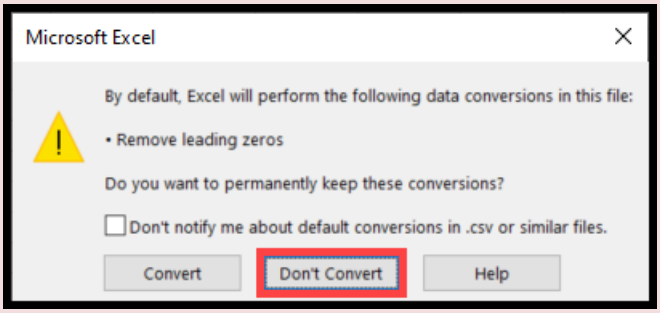
The Template Download & File Upload step is used to download blank templates or templates that are pre-populated with students or staff that are in Infinite Campus SIS. Once completed, these templates are then uploaded to Infinite Campus to create new Food Service accounts.

Column headers must be spelled the same way as in the template file. If a user wants to keep notes in the upload file, they can do so, but it must be in a column to the right of the PIN column and not contain any headers.

A person who is not staff or a student could be on either file, such as a parent account with a person ID and no current staff/student record.

1. Click **Download Template(s)**.
2. Select from one of the following templates: Enrolled Campus Students, Employed Campus Staff, Blank Student, or Blank Staff.

When opening these files, select Don't Convert. Do not remove leading zeros that may be included in the student/staff number, person ID, or PIN.



3. Complete and save each template. Review the Fields in the Student Template and Fields in the Staff Template tables for more information regarding the columns within the template.
4. Click **Upload File(s)**.
5. Select the Patron Type. This opens the Import File Upload side panel.
6. Click **Select files...** and choose a completed template.
7. Click **Save**.
8. Click **Next**.

Fields in the Student Template

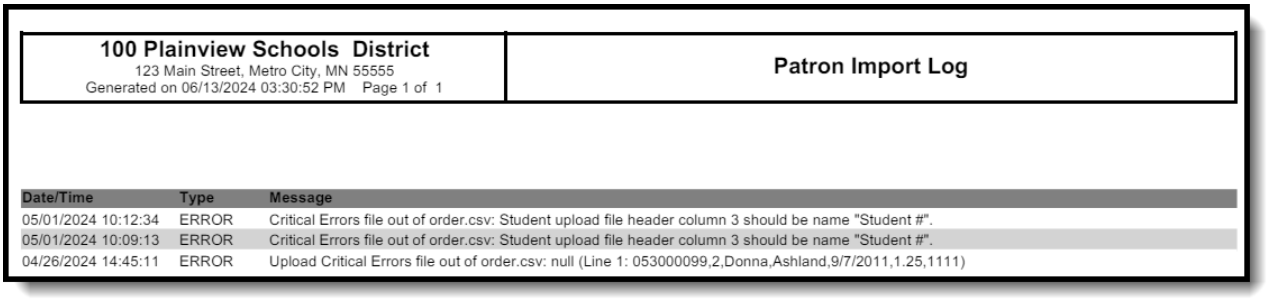
Name	Type	Required	Used in Data Match	Description
First Name	string (50)	Yes	Yes	The student's first name.
Last Name	string (50)	Yes	Yes	The student's last name.
Student #	string (15)	No	Yes	The district-wide unique identifier for the student.
Birthdate	date	No	Yes	The student's birth date formatted mm/dd/yyyy.
Person ID	int (9)	No	Yes	The district-wide unique identifier for each person. The Person ID should match what is in the Infinite Campus SIS.

Balance	string (15)	No	No	The beginning balance of the Food Service account.
PIN	string (15)	No	No	The district-wide unique identifier account PIN for the Food Service account. If left blank, the conversion will generate a random 4-digit PIN.

Fields in the Staff Template

Name	Type	Required	Used in Data Match	Description
First Name	string (50)	Yes	Yes	The staff's first name.
Last Name	string (50)	Yes	Yes	The staff's last name.
Staff #	string (15)	No	Yes	The district-wide unique identifier for the staff.
Birthdate	date	No	Yes	The staff's birth date formatted mm/dd/yyyy.
Person ID	int (9)	No	Yes	The district-wide unique identifier for each person. The Person ID should match what is in the Infinite Campus SIS.
Balance	string (15)	No	No	The beginning balance of the Food Service account.
PIN	string (15)	No	No	The district-wide unique identifier account PIN for the Food Service account. If left blank, the conversion will generate a random 4-digit PIN.

Error Report



100 Plainview Schools District
123 Main Street, Metro City, MN 55555
Generated on 06/13/2024 03:30:52 PM Page 1 of 1

Patron Import Log

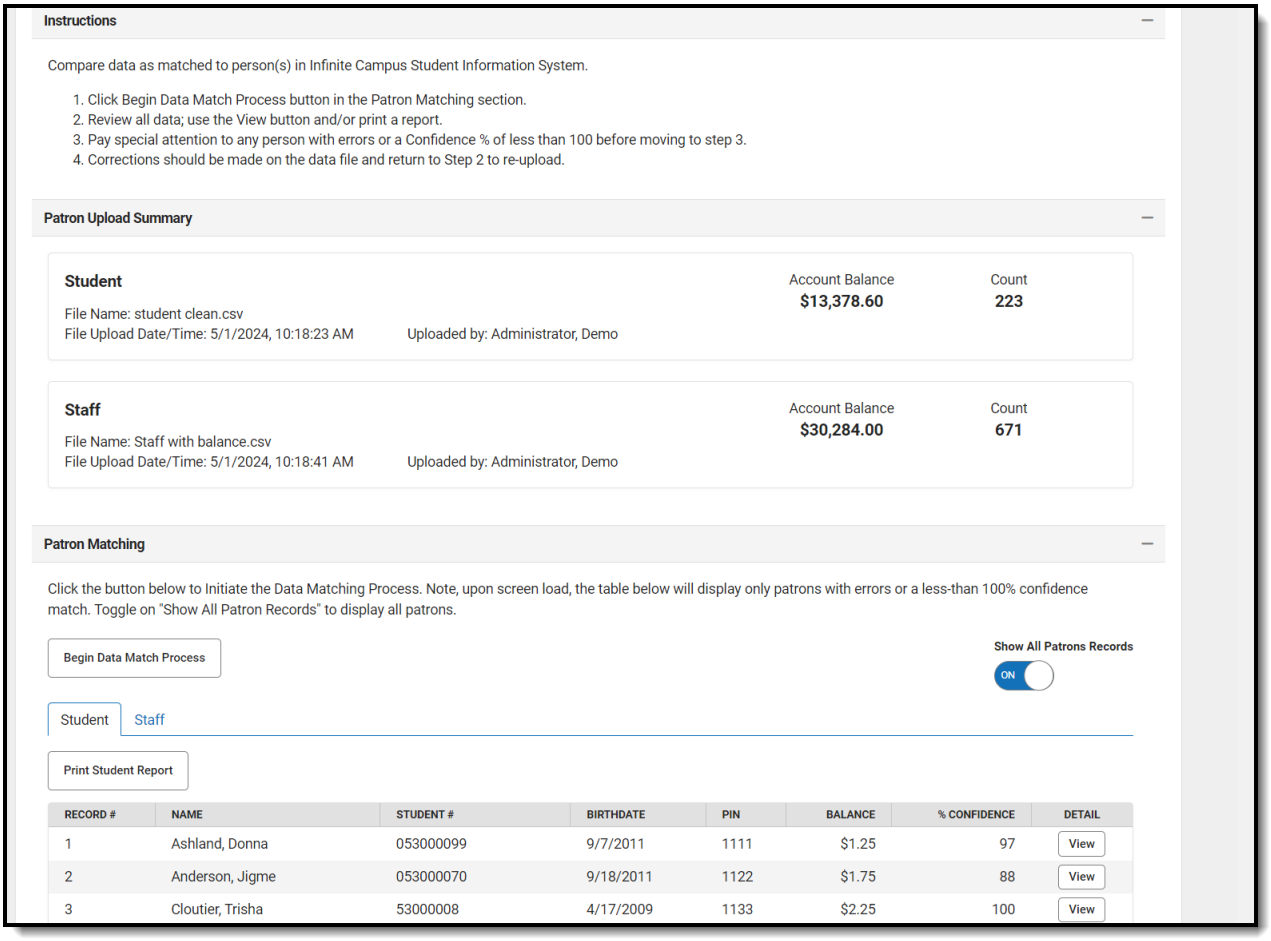
Date/Time	Type	Message
05/01/2024 10:12:34	ERROR	Critical Errors file out of order.csv: Student upload file header column 3 should be name "Student #".
05/01/2024 10:09:13	ERROR	Critical Errors file out of order.csv: Student upload file header column 3 should be name "Student #".
04/26/2024 14:45:11	ERROR	Upload Critical Errors file out of order.csv: null (Line 1: 053000099,2,Donna,Ashland,9/7/2011,1.25,1111)

The Error Report button on Step 2 checks for all critical errors that would cause a file to be rejected. Discrepancies between the existing information and uploaded templates will appear within the Error Report, with the most recent upload errors displayed on top. Any line number listed in the error will match their row in the .csv file. If there is an error when uploading a file that does not add a line to the Error Report Log, the session has timed out, and the page must be refreshed/reloaded.

Errors	Descriptions
File Level Errors	These errors will report only one error line per upload attempt. • Not the correct file type. • File exceeds 5M. • Column 3 is NOT "Student #" and patron type = Student. • Column 3 is NOT "Staff #" and patron type = Staff. • Extra column headers. To keep notes in the upload file and have more than seven columns in the file: • The notes must be to the right of the required columns. • The notes can have no headers.
Person Level Errors	These errors will report only if there are no file-level-errors and can report multiple error lines per upload attempt. • Invalid number format. ◦ Balance includes a dollar sign ($10.25) or has too many decimal points (10..25). ◦ Number has too many decimal places. • Invalid date format. ◦ Needs to be formatted mm/dd/yyyy.

There may be other errors that appear on this log that are not described here. For assistance with any unclear errors, users should contact Support.

Data Matching

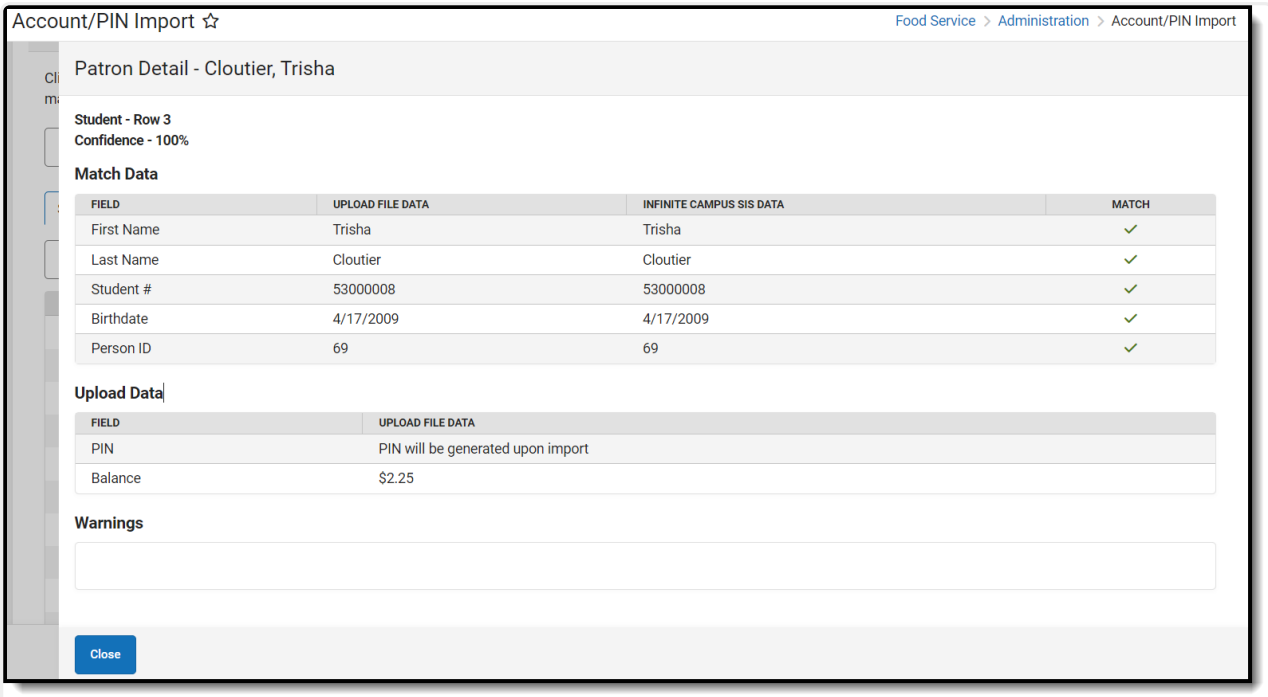


The Data Matching step is used to match students and staff within Infinite Campus SIS to the data within the file uploaded in step 2. Each field that was entered will be matched to existing information and a Confidence percentage will be generated in the table. When Begin Data Match has been used, the Student and Staff tabs will only display patrons with less than 100% match or critical errors that must be fixed. To see patrons with a 100% match as well, turn on the Show All Patrons Records Toggle.

First name and last name alone will not provide a match. To form a match, the first name and last name must be combined with another data point (birthdate, Student/Staff #, or Person ID).

The Record # does not correspond to the row number in the .csv file.

1. Click **Begin Data Match Process** in the Patron Matching section.
2. Review all data using the **View** button and/or **Print a Report.**



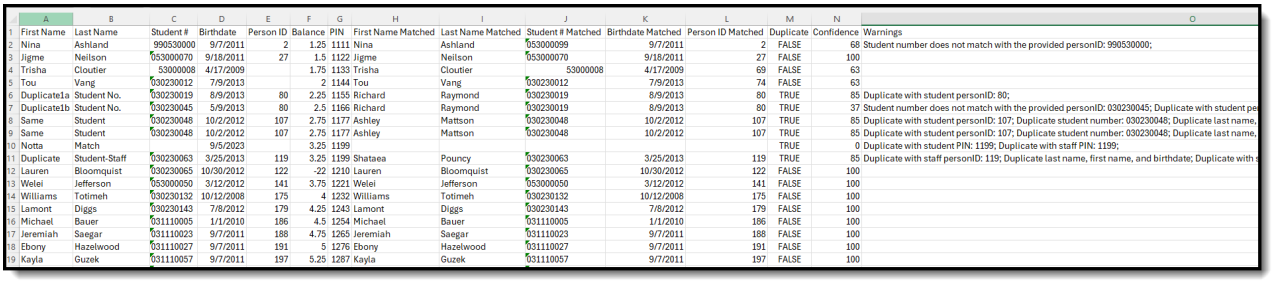
Patron Details after clicking the View button

3. Review the match data for anyone less than 100% to ensure it is the correct match. If it is not the correct match, then correct the information on the data file and reupload.
4. After uploading and reviewing the data match, click **Next**.

Printing Student or Staff Report

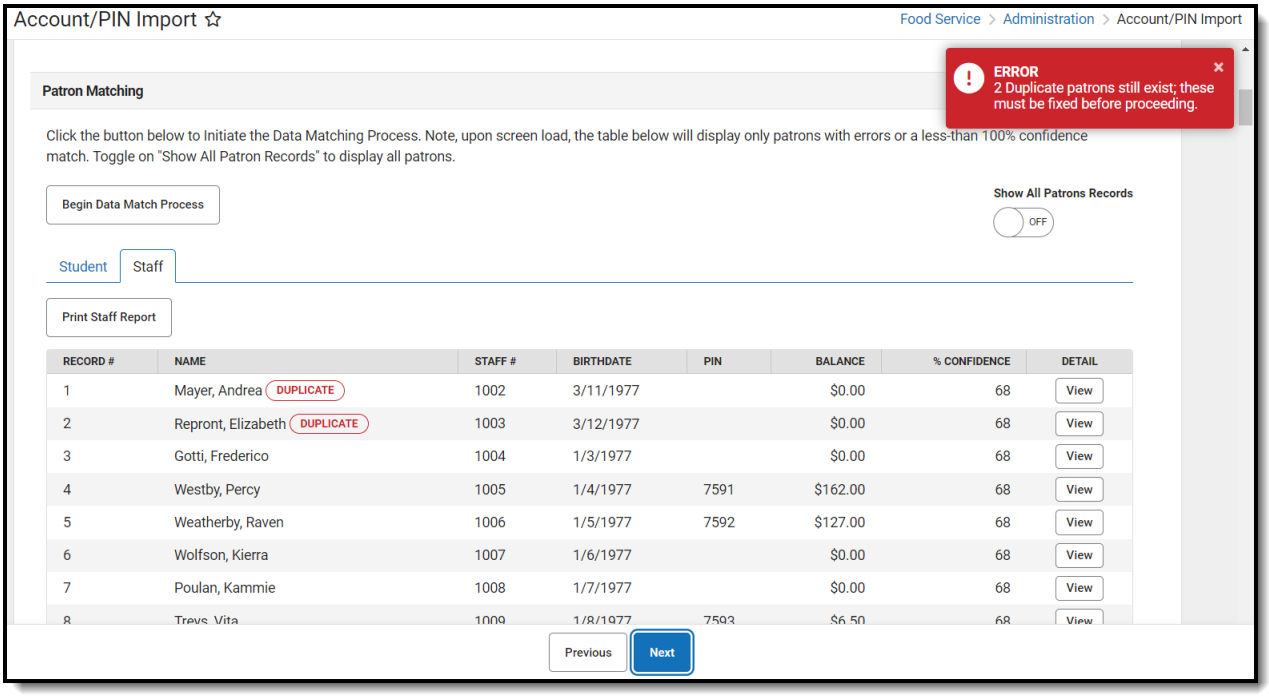
After using Begin Data Match Process, the data can be reviewed in a .csv file by clicking Print Student Report or Print Staff Report. The reports include the original upload data, matched data, duplicate warnings, confidence %, and error messages. The report button that appears depends on whether the Student or Staff report has been selected.

The reports can be used to make changes, but the headers for rows H-O must be deleted.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	First Name	Last Name	Student #	Birthdate	Person ID	Balance	PIN	First Name Matched	Last Name Matched	Student # Matched	Birthdate Matched	Person ID Matched	Duplicate	Confidence	Warnings
2	Nina	Ashland	990530000	9/7/2011	2	1.25	1111	Nina	Ashland	53000099	9/7/2011	2	FALSE	68	Student number does not match with the provided personID: 990530000;
3	Jigme	Neilson	053000070	9/18/2011	27	1.5	1122	Jigme	Neilson	053000070	9/18/2011	27	FALSE	100	
4	Trisha	Cloutier	53000008	4/17/2009		1.75	1133	Trisha	Cloutier	53000008	4/17/2009	69	FALSE	63	
5	Tou	Vang	030230012	7/9/2013		2	1144	Tou	Vang	030230012	7/9/2013	74	FALSE	63	
6	Duplicate1a	Student No.	030230019	8/9/2013	80	2.25	1155	Richard	Raymond	030230019	8/9/2013	80	TRUE	85	Duplicate with student personID: 80;
7	Duplicate1b	Student No.	030230045	5/9/2013	80	2.5	1166	Richard	Raymond	030230019	8/9/2013	80	TRUE	37	Student number does not match with the provided personID: 030230045; Duplicate with student pe
8	Same	Student	030230048	10/2/2012	107	2.75	1177	Ashley	Mattson	030230048	10/2/2012	107	TRUE	85	Duplicate with student personID: 107; Duplicate student number: 030230048; Duplicate last name,
9	Same	Student	030230048	10/2/2012	107	2.75	1177	Ashley	Mattson	030230048	10/2/2012	107	TRUE	85	Duplicate with student personID: 107; Duplicate student number: 030230048; Duplicate last name,
10	Notta	Match		9/5/2023		3.25	1199						TRUE	0	Duplicate with student PIN: 1199; Duplicate with staff PIN: 1199;
11	Duplicate	Student-Staff	030230063	3/25/2013	119	3.25	1199	Shataea	Pouncy	030230063	3/25/2013	119	TRUE	85	Duplicate with staff personID: 119; Duplicate last name, first name, and birthdate; Duplicate with s
12	Lauren	Bloomquist	030230065	10/30/2012	122	-22	1210	Lauren	Bloomquist	030230065	10/30/2012	122	FALSE	100	
13	Welei	Jefferson	053000050	3/12/2012	141	3.75	1221	Welei	Jefferson	053000050	3/12/2012	141	FALSE	100	
14	Williams	Totimeh	030230132	10/12/2008	175	4	1232	Williams	Totimeh	030230132	10/12/2008	175	FALSE	100	
15	Lamont	Diggs	030230143	7/8/2012	179	4.25	1243	Lamont	Diggs	030230143	7/8/2012	179	FALSE	100	
16	Michael	Bauer	031110005	1/1/2010	186	4.5	1254	Michael	Bauer	031110005	1/1/2010	186	FALSE	100	
17	Jeremiah	Saegar	031110023	9/7/2011	188	4.75	1265	Jeremiah	Saegar	031110023	9/7/2011	188	FALSE	100	
18	Ebony	Hazelwood	031110027	9/7/2011	191	5	1276	Ebony	Hazelwood	031110027	9/7/2011	191	FALSE	100	
19	Kayla	Guzek	031110057	9/7/2011	197	5.25	1287	Kayla	Guzek	031110057	9/7/2011	197	FALSE	100	

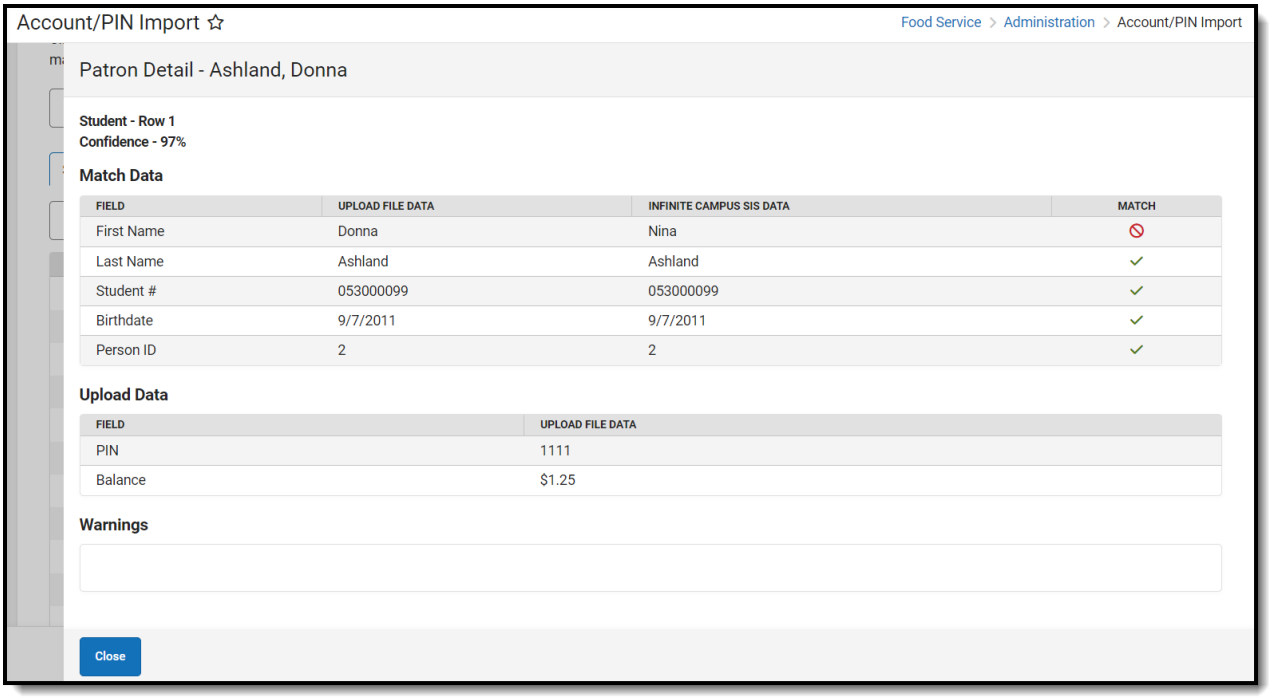
Errors in Data Matching



Critical errors, such as No Match and Duplicate, must be corrected or removed from the upload file before moving on to step 4.

Errors	Descriptions
No Match	Appears when a patron cannot match to a PersonID and receives a 0% confidence rating.
Duplicate	Appears when duplicate PersonID and/or PIN records between the Staff and Student patron types.

Information errors, which appear after clicking a patron's View button, show that a data point did not match and lowers the % Confidence. These errors will not stop you from proceeding to the next step.



% Confidence Field

The % Confidence field displays a number based on the data parameters that match an existing student and one being uploaded. Data matching will compare all available data points provided and come up with the Campus person record that most closely matches. The more data points provided that match, the higher the Confidence %.

If there is a 0% match and there is a person in Infinite Campus SIS that should match to the person on the file users should either:

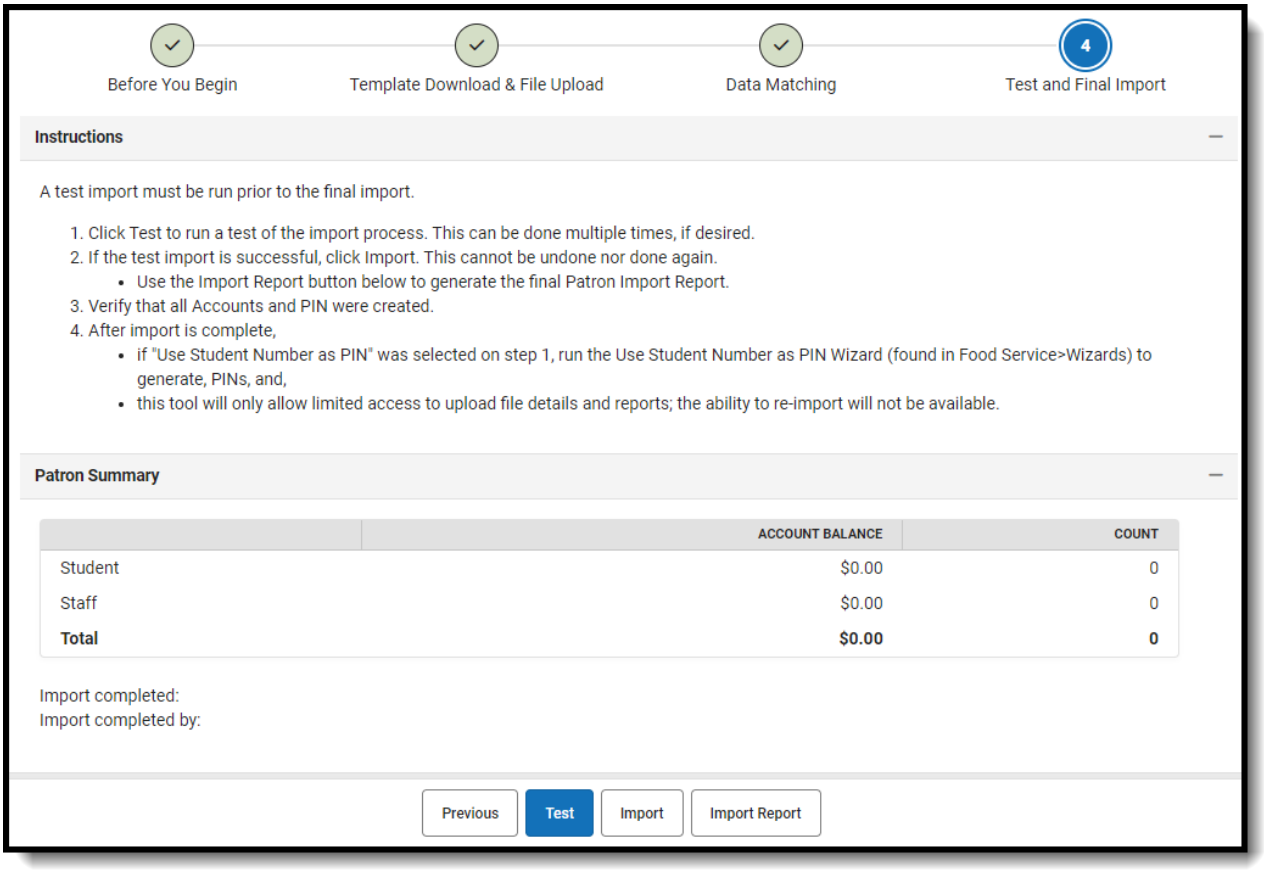
1. Add more data to the file to increase the match percent and re-upload the file.
2. Remove the person from the data file and, after conversion is complete, add the PIN and balance manually.

If there is no person currently in Campus SIS to match to, add the person in Campus SIS and perform the data matching process again.

If there is a duplicate, remove the duplicate record from the file, correct the data, and re-upload the file.

Tip: Check both the Student and Staff tabs for errors and warnings.

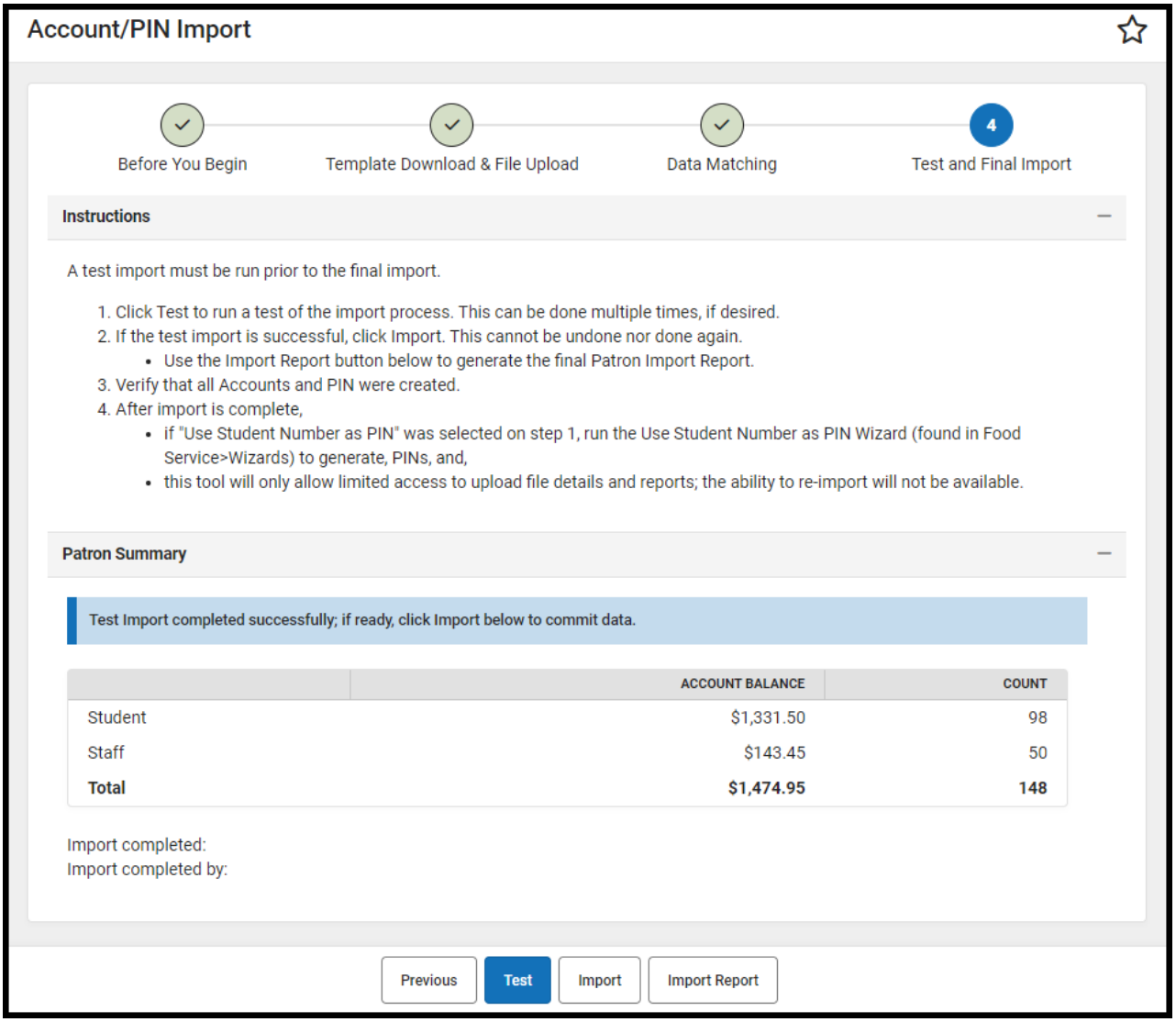
Test and Final Import



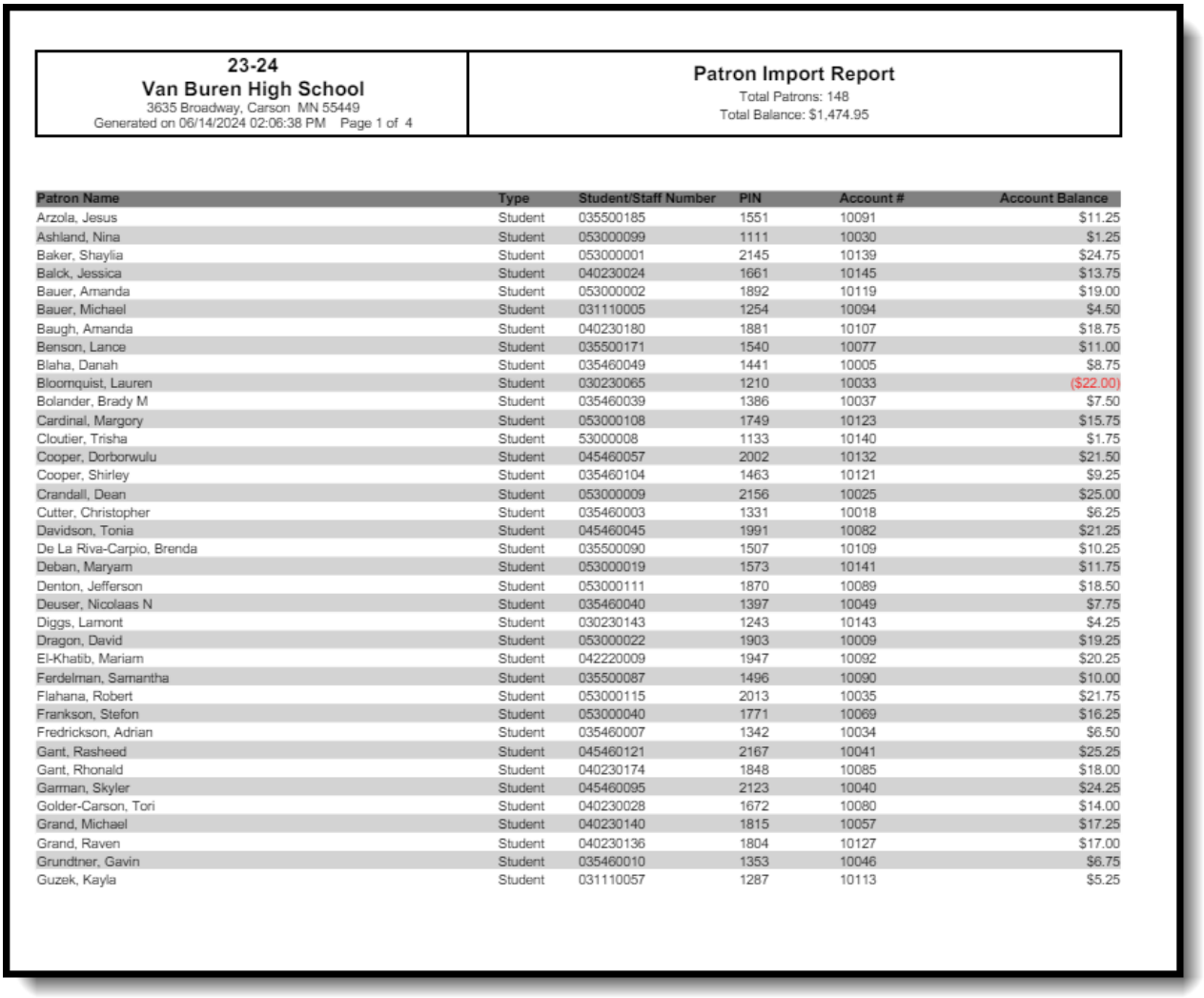
A test import must be run before the final import.

1. Click **Test** to run a test of the import process. This can be done multiple times, if desired.

If any of the error messages need to be clarified, contact Support for assistance.



2. If the test import is successful, click **Import**. This cannot be undone or done again.
    - Use the Import Report button below to generate the final Patron Import Report.

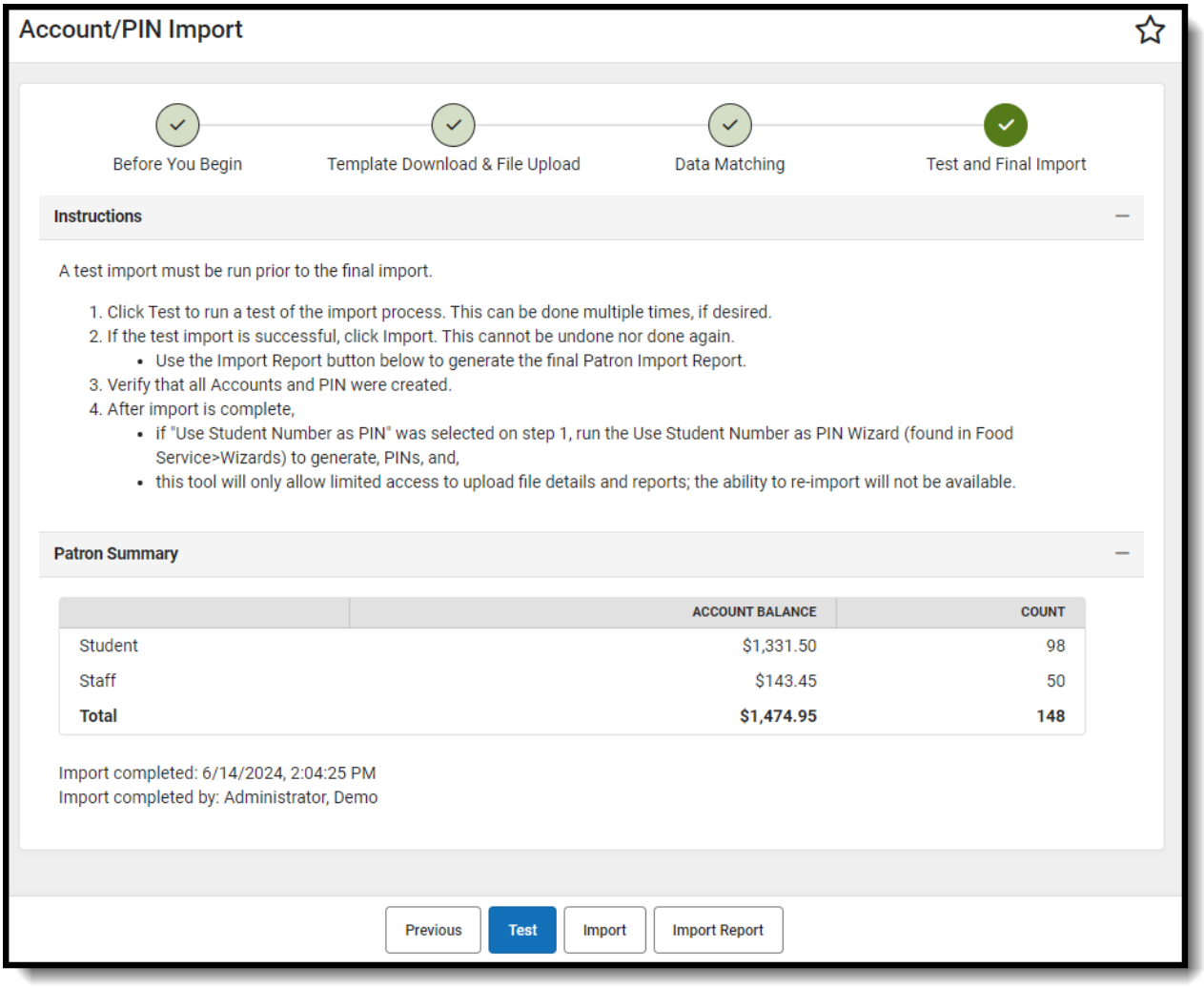


23-24
Van Buren High School
3635 Broadway, Carson MN 55449
Generated on 06/14/2024 02:06:38 PM Page 1 of 4

Patron Import Report
Total Patrons: 148
Total Balance: $1,474.95

Patron Name	Type	Student/Staff Number	PIN	Account #	Account Balance
Arzola, Jesus	Student	035500185	1551	10091	$11.25
Ashland, Nina	Student	053000099	1111	10030	$1.25
Baker, Shaylia	Student	053000001	2145	10139	$24.75
Balck, Jessica	Student	040230024	1661	10145	$13.75
Bauer, Amanda	Student	053000002	1892	10119	$19.00
Bauer, Michael	Student	031110005	1254	10094	$4.50
Baugh, Amanda	Student	040230180	1881	10107	$18.75
Benson, Lance	Student	035500171	1540	10077	$11.00
Blaha, Danah	Student	035460049	1441	10005	$8.75
Bloomquist, Lauren	Student	030230065	1210	10033	($22.00)
Bolander, Brady M	Student	035460039	1386	10037	$7.50
Cardinal, Margory	Student	053000108	1749	10123	$15.75
Cloutier, Trisha	Student	53000008	1133	10140	$1.75
Cooper, Dorborwulu	Student	045460057	2002	10132	$21.50
Cooper, Shirley	Student	035460104	1463	10121	$9.25
Crandall, Dean	Student	053000009	2156	10025	$25.00
Cutter, Christopher	Student	035460003	1331	10018	$6.25
Davidson, Tonia	Student	045460045	1991	10082	$21.25
De La Riva-Carpio, Brenda	Student	035500090	1507	10109	$10.25
Deban, Maryam	Student	053000019	1573	10141	$11.75
Denton, Jefferson	Student	053000111	1870	10089	$18.50
Deuser, Nicolaas N	Student	035460040	1397	10049	$7.75
Diggs, Lamont	Student	030230143	1243	10143	$4.25
Dragon, David	Student	053000022	1903	10009	$19.25
El-Khatib, Mariam	Student	042220009	1947	10092	$20.25
Ferdelman, Samantha	Student	035500087	1496	10090	$10.00
Flahana, Robert	Student	053000115	2013	10035	$21.75
Frankson, Stefon	Student	053000040	1771	10069	$16.25
Fredrickson, Adrian	Student	035460007	1342	10034	$6.50
Gant, Rasheed	Student	045460121	2167	10041	$25.25
Gant, Rhonald	Student	040230174	1848	10085	$18.00
Garman, Skyler	Student	045460095	2123	10040	$24.25
Golder-Carson, Tori	Student	040230028	1672	10080	$14.00
Grand, Michael	Student	040230140	1815	10057	$17.25
Grand, Raven	Student	040230136	1804	10127	$17.00
Grundtner, Gavin	Student	035460010	1353	10046	$6.75
Guzek, Kayla	Student	031110057	1287	10113	$5.25

3. Verify that all Accounts and PINs were created.
4. After the import is complete:
    - If "Use Student Number as PIN" was selected on step 1, run the Use Student Number as PIN Wizard (found in Food Service>Wizards) to generate PINs.
    - This tool will only allow limited access to upload file details and reports; the ability to re-import will not be available.


Account/PIN Import
Before You Begin
Template Download & File Upload
Data Matching
Test and Final Import
Instructions
A test import must be run prior to the final import.
1. Click Test to run a test of the import process. This can be done multiple times, if desired.
2. If the test import is successful, click Import. This cannot be undone nor done again.
• Use the Import Report button below to generate the final Patron Import Report.
3. Verify that all Accounts and PIN were created.
4. After import is complete,
• if "Use Student Number as PIN" was selected on step 1, run the Use Student Number as PIN Wizard (found in Food Service>Wizards) to generate, PINs, and,
• this tool will only allow limited access to upload file details and reports; the ability to re-import will not be available.
Patron Summary
ACCOUNT BALANCE
COUNT
Student $1,331.50 98
Staff $143.45 50
Total $1,474.95 148
Import completed: 6/14/2024, 2:04:25 PM
Import completed by: Administrator, Demo
Previous
Test
Import
Import Report