

Institution Onboarding Guide

This guide helps institutions prepare Excel files for bulk imports into Turtl CMS. All imports support `.xlsx` and `.xls` formats.

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1. Institution Details (manual)

Provide your institution's basic information and address details.

Sample File

institution-details-sample.xlsx

Column Reference

Column	Required	Max Length	Description	Example
Institution Name	Yes	255 characters	Full name of your institution	Your Institution Name
Institution Code	Yes	50 characters	Short unique identifier	INST001
Institution Type	Yes	-	Type of institution	College / School
Phone Number	Yes	20 characters	Contact phone with country code	+91 9876543210
Website	Yes	-	Institution website URL	www.example.edu.in
Street Address	Yes	200 characters	Building/Plot address	123, Main Road
City	Yes	100 characters	City name	Your City
State / Province	Yes	100 characters	State or province	Your State
Country	Yes	100 characters	Country name	India

Column	Required	Max Length	Description	Example
Postal Code	Yes	20 characters	PIN/ZIP code	123456

Institution Type Values

- **School** - K-12 schools
- **College** - Colleges and universities

Notes

- Institution Logo should be uploaded separately through the CMS interface
- Address fields help with location-based features and reports

2. Staff Import

Bulk invite staff members (teaching and non-teaching) to your institution.

Sample File

staff-import-sample.xlsx

Column Reference

Column	Required	Description	Example
Employee Name	Yes	Full name of the employee	John Doe
Email ID	Yes	Official email (institution/university emails only)	john.doe@institution.edu
Phone Number	Yes	10 digits (no country code)	9876543210
Employee ID	Yes	Unique employee identifier (cannot be changed once set)	EMP001
Account Level	Yes	Access level	Staff
Department	Yes	Department name	Computer Science
Employee Category	Yes	Category of employment	Teaching / Non-Teaching
Designation	Yes	Job title/position	Assistant Professor

Account Level Values

- **Admin** - Full administrative access
- **Head of Department** - Department-level management access
- **Staff** - Regular staff access

Employee Category Values

- **Teaching** - Faculty members
- **Non-Teaching** - Administrative and support staff

Validation Rules

1. **Email format:** Must be a valid institutional email address
2. **Phone format:** Exactly 10 digits, no spaces or special characters
3. **No duplicate emails:** Each email must be unique
4. **Employee ID:** Once set, cannot be modified

Constraints

- **Maximum file size:** 30 MB
 - **Maximum rows:** 500 staff per import
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3. Academic Structure Import

Import your institution's hierarchy (departments, programs, years, sections, etc.) in bulk.

Sample Files

Institution Type	Sample File
School (K-12)	school-structure-sample.xlsx
Engineering College	engineering-college-sample.xlsx
Arts & Science College	arts-science-college-sample.xlsx
Pharmacy College	pharmacy-college-sample.xlsx

Column Structure by Institution Type

The column structure depends on your institution type. Each row represents a leaf node (the most granular level where students are assigned).

School (K-12)

Column	Required	Description	Example
ACADEMIC YEAR	Yes	Academic session	2025-2026
GRADE	Yes	Grade/Class level	Grade 10
SECTION	Yes	Section name under a grade	Section A

Hierarchy: ACADEMIC YEAR → GRADE → SECTION

Engineering College

Column	Required	Description	Example
ACADEMIC YEAR	Yes	Academic session	2025-2026
BRANCH	Yes	Engineering branch/department	Computer Science
YEAR	Yes	Year of study	First Year
SEMESTER	Yes	Semester within the year	Semester 1

Hierarchy: ACADEMIC YEAR → BRANCH → YEAR → SEMESTER

Arts & Science College

Column	Required	Description	Example
ACADEMIC YEAR	Yes	Academic session	2025-2026
COURSE	Yes	Course/Program name	Bachelor of Commerce
YEAR	Yes	Year of study	First Year
SEMESTER	Yes	Semester within the year	Semester 1

Hierarchy: ACADEMIC YEAR → COURSE → YEAR → SEMESTER

Pharmacy College

Column	Required	Description	Example
ACADEMIC YEAR	Yes	Academic session	2025-2026
YEAR	Yes	Year of study	First Year
SEMESTER	Yes	Semester within the year	Semester 1

Hierarchy: ACADEMIC YEAR → YEAR → SEMESTER

Programs included in sample: - **B.Pharm (4-Year):** 8 semesters across 4 years - **M.Pharm (2-Year):** 4 semesters across 2 years

Constraints

- **Maximum file size:** 30 MB
 - **Fill columns sequentially:** Do not leave gaps between columns
 - **No duplicate rows:** Each combination must be unique
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4. Subjects Import

Add subjects in bulk to any academic node.

Column Reference

Column	Required	Max Length	Description	Example
Subject Code	Yes	50 characters	Unique subject identifier	CS101
Subject Name	Yes	255 characters	Full subject name	Introduction to Computer Science
Short Form	No	50 characters	Abbreviated name for display	Intro CS

Validation Rules

1. **Subject Code:** Must be unique within the academic node
2. **Subject Name:** Cannot be empty or whitespace only
3. **No duplicates:** Subject codes must not already exist in the target node

Constraints

- **Maximum file size:** 10 MB
 - **Maximum rows:** 500 subjects per import
 - **Target node:** Subjects are added to a specific academic node
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5. Subject-Staff Mapping (manual)

Link subjects to academic structure and assign staff members to teach each subject.

Sample File

subject-staff-mapping-sample.xlsx

Column Reference

Column	Required	Description	Example
Year	Yes	Year of study	Year 1
Semester	Yes	Semester within the year	Semester 1
Section	Yes	Section name	Section A
Subject Code (Subject Name)	Yes	Subject code followed by name	SUB101 Subject Name 1
Staff Employee ID (Staff Name)	Yes	Employee ID followed by name	EMP001 Staff Name 1

Format Guidelines

- **Subject Code (Subject Name):** Combine code and name with a space (e.g., SUB101 Introduction to Physics)
- **Staff Employee ID (Staff Name):** Combine ID and name with a space (e.g., EMP001 John Doe)

Validation Rules

1. **Year/Semester/Section:** Must match existing academic structure
2. **Subject Code:** Must match an existing subject code
3. **Staff Employee ID:** Must match an existing staff member

Constraints

- **Maximum file size:** 30 MB
- **One mapping per row:** Each row assigns one staff to one subject in one section

6. Student Import

Bulk invite students along with their parent/guardian details. Each Excel file contains students for a **specific section**.

File Naming Convention

Name your Excel file based on the target section path:

Format: Academic Year-Year-Semester-Section.xlsx

Example: 2025-2026-First Year-Semester 2-Section A.xlsx

Level	Value
Academic Year	2025-2026
Year	First Year
Semester	Semester 2
Section	Section A

Create separate Excel files for each section.

Sample File

student_import_sample.xlsx

Column Reference

Column	Required	Format	Description	Example
Student Name	Yes	Text	Full name of the student	John Doe
Student Email	Yes	Valid email	Student's email address	john@school.edu
Student Phone	Yes	10 digits (no country code)	Student's mobile number	9876543210
Student ID	Yes	Text	Roll number or admission ID	STU2024001
Parent Name	Yes	Text	Parent/Guardian full name	Richard Doe
Parent Phone	Yes	10 digits (no country code)	Parent's mobile number	9876543200
Parent Relation	Yes	Enum (see below)	Relationship to student	Father
Parent Email	No	Valid email	Parent's email address	richard@email.com

Parent Relation Values

Only the following values are accepted (case-sensitive):

- **Father**
- **Mother**
- **Guardian**
- **Other**

Validation Rules

1. **Email format:** Must be a valid email address (e.g., `name@domain.com`)
2. **Phone format:** Exactly 10 digits, no spaces or special characters
3. **No duplicate emails:** Each student email must be unique within the import
4. **Parent relation:** Must match one of the allowed values exactly

Constraints

- **Maximum file size:** 30 MB
- **Maximum rows:** 1,000 students per import
- **One section per file:** Create separate Excel files for each section