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From Spreadsheets to a School Management System: A Practical Migration Guide

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How to move school records from Excel to a management system without losing data: migration order, data cleaning, pilot imports, staff training and the mistakes that sink the project.

The safest way to move school records from spreadsheets to a management system is in stages, not in one heroic weekend. Register first, then fees, then marks — in that order, because everything hangs off the student register. Clean the spreadsheets before you import, prove the system with one class, and keep the old files as a read-only archive. Schools that follow that order are live in weeks; schools that try to move everything at once are still reconciling two systems a term later.

Who this guide is for

Principals, directors and administrators of Kenyan schools whose records live in a mix of Excel files, paper registers and somebody's memory — and who have decided, or are deciding, to move to a school management system. If you are still comparing options, read our buyer's checklist and the manual vs digital comparison first; this guide assumes the decision is made.

Migration order: why the register comes first

Every other record belongs to a learner. Fee balances hang off admission numbers; marks hang off admission numbers; even the parent phone book hangs off admission numbers. So the student register is not just another spreadsheet — it is the foundation everything else imports into.

Stage

What moves

Why at this point

1

Student register: names, admission numbers, class, stream, guardians, contacts

Everything else keys off this

2

Class and stream structure, staff list, subjects

Needed before anything can be assigned

3

Fee structures and opening balances per learner

Money data must be exactly right — import after the register is verified

4

Current marks and assessment records

Only needs the current term; history can follow later

5

Everything else: timetable, library, transport, past records

Nice to have — never block go-live on it

Step by step

1. Pick a cutover date that fits the school year

Start of a term is ideal; start of the academic year is best. Kenyan schools closing in November have a natural window — set up over the holidays, go live with the 2027 intake in January. Avoid mid-term cutovers: you end up with half a term of marks in each system and neither is complete.

2. Freeze a master copy of each spreadsheet

Decide which file is the truth — not three versions named "register FINAL v2 real.xlsx" on three computers. Save a dated copy somewhere safe and stop all edits to it. That file is now your archive; the live system takes over from the cutover date.

3. Clean the data before it goes anywhere near the new system

Spreadsheets accumulate years of quiet damage. Fix these before import:

Common problem

Fix before import

"Grade 4", "G4", "Gr 4", "4 WEST" used at random

One naming convention — e.g. "Grade 4" + stream letter

Missing or duplicated admission numbers

Assign a unique number to every learner, no exceptions

Two learners sharing one row, or one learner on two rows

One row, one learner — split or merge deliberately

Parent phones as "0722 xxx", "722-xxx", "+254…"

Standardise to one format (07xxxxxxx works everywhere)

Fee balances typed as "15,000 (paid part)"

Numbers as numbers; notes in a separate column

Merged cells and blank header rows

Flat table — one header row, no merges

Every hour spent cleaning here saves a day of untangling after import. Dirty data does not get cleaner inside a system — it just gets faster at being wrong.

4. Map spreadsheet columns to system fields

Before importing, write down which column becomes which field: Surname → last name, "Class" → grade, "Parent tel" → guardian phone. Fields with no home either get dropped (fine) or get a decision (does this school actually use it?). This mapping sheet is also your spot-check reference later.

5. Import one class first — then verify it to death

Pick a single class or stream. Import it, then compare: learner count in spreadsheet vs system, every name spelled, each guardian phone correct. Only when one class is provably right do you import the rest. A systematic error — columns shifted, wrong sheet — is cheap to fix on 45 learners and miserable on 900.

6. Load opening fee balances with a cutover date

Each learner's balance as at the cutover date goes in as a labelled opening balance, not as a mysterious lump. Note which term it belongs to. Then all new charges and payments live only in the system — a balance split across two places will be wrong in both.

7. Train staff on the daily workflow, not on "the system"

Teachers need three things: mark the register, enter marks, find a learner. The bursar needs: record a payment, print a receipt, pull a balances list. Train each role on its five daily tasks and leave advanced features for later. A one-hour session per group, on real data, beats a day-long seminar.

8. Switch over — and stop double entry

From the cutover date, new records go in the system only. The old spreadsheets stay as read-only archive for history queries. The number-one cause of failed migrations is running both "just in case" — within a month the two disagree and nobody knows which to trust.

Common mistakes that sink migrations

- **Migrating everything at once.** Ten years of marks, the library catalogue and the staff leave records in one import guarantees a stalled project. Go live on the essentials; history follows.
- **Importing dirty data.** The system will faithfully store every typo and every duplicated learner — and display them with confidence.
- **No single owner.** "Everyone will help" means nobody does. One person — usually the administrator or deputy — owns the migration and its checklist.
- **Skipping the pilot.** Straight to full import is how you discover the class column was misread — 900 times.
- **Parallel running forever.** Two weeks of overlap to build confidence is sensible; a whole term of double entry is how staff quietly give up.

- **Forgetting the opening balances date.** A KSh 18,000 balance with no "as at" date will be disputed all year.

Pre-migration checklist

- ■ Cutover date chosen (start of term/year)
- ■ One named person owns the migration
- ■ Master copies of all spreadsheets frozen and archived
- ■ Class and stream names standardised
- ■ Every learner has a unique admission number
- ■ Column-to-field mapping written down
- ■ Pilot class imported and verified against source
- ■ Opening fee balances loaded with an "as at" date
- ■ Each staff role trained on its daily tasks
- ■ Old files set to read-only; double entry stopped

Where Mwalimu Ease fits

Mwalimu Ease was built for Kenyan schools making exactly this move. The student register holds learners by grade and stream with guardian contacts; the finance module carries fee structures and per-learner balances with receipts; marks entry and CBE report cards cover assessment. Because students, fees and marks live in one system, each import builds on the last — which is what makes the staged approach above work cleanly. See pricing, or start with the modules your school needs first and grow into the rest.

Frequently asked questions

Do we have to re-enter all our historical records?

No. Migrate the current register, opening balances and this term's marks. Older records stay in the archived spreadsheets for lookups — most schools find they almost never open them after the first term.

Our records are on paper, not spreadsheets. Where do we start?

Type the current student register into a spreadsheet first — admission number, name, class, guardian phone — then clean and import that. Paper-to-system in one step is how records get invented.

How long does a migration take?

For a school of a few hundred learners with reasonably kept spreadsheets: a few days of cleaning, a pilot import, then the full register and balances within a couple of weeks. The cleaning, not the importing, is what takes time.

Can we keep producing our old Excel reports?

You can export data when you need a specific format, but run the school on the system's own registers, statements and reports — exporting everything back to Excel recreates the problem you were solving.

What if staff resist the change?

Resistance usually means the training missed their daily task. Retrain by role on the five things each person does every day, and make the system visibly easier than the spreadsheet — that is the only argument that wins.

Sources

- Manual school records vs digital systems — an honest comparison
- What to look for when buying school management software
- Ministry of Education, Kenya

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