6.7: Enrollment Import

Overview

This document explains how to import both student and staff bulk enrollment files into Classworks. Both staff and students can be on the same file or you can import two separate files – one for students and one for staff members – if you prefer.

Preparation

1. In order to ensure that all students and staff are imported into the correct school group, make sure you check each school's SIS ID/Code. You can do this by clicking on the **Administration Tab** `Administration` and the **Schools Sub Tab.** `Schools` Each SIS ID/Code must be entered into Classworks exactly as it is listed on the import file.

2. Prior to importing, you will need to extract the required data from your SIS into a .csv file. It must be saved in a .csv file format.

3. Each field (required fields listed below) must be its own separate column.

4. You may choose to have column headings on your file, but they are not required. If you use our column headings (see chart below & pg. 9), Classworks will auto match the columns for you. If you do not use our column headings or do not have any column headings, you will be able to match the columns during the process.

Required Fields

See **page 9** for a list of **Optional Fields** that can be imported in addition to these required fields.

Column Heading Name	Values	Required Field Staff or Student
First Name	Alphanumeric, 20 character max., hyphen ok	Both
Last Name	Alphanumeric, 20 character max., hyphen ok	Both
Username	Alphanumeric, 255 char max., must be unique per user	Both
District ID	Alphanumeric, 20 char max., must be unique per user	Both
Password	Alphanumeric, 6 char min., case sensitive	Both
Birth Date	MM/DD/YYYY, MM-DD-YYYY, MMDDYYYY	Both
User Type	0= student; 1=staff	Both
Grade*	Pre-K, K, 1-12	Student
Email*	Alphanumeric, symbols ok (@ and .), no spaces, 255 char max.	Staff (optional for students)
School SIS ID*	Alphanumeric, 12 char max.	Both

Highly Recommended   **Bolded** = fields that both students and staff will use to login to Classworks

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Note: Only users with District Administrative rights within Classworks can perform the following steps.

Select a File

Step	Action
1	Click on the **Administration Tab** Administration
2	Click on the **Import Sub Tab** Import
3	Click on the "**+ Create New**" link located on the right side of the screen. ⊕ Create New
4	Select the Import Type: **User Enrollment Data**
5	Select how Classworks will determine which school group each staff/student will belong to. There are 2 options: A. "Schools are specified in file" is the default option and is checked. This option would require you to include a column on your file that contains the school's SIS ID/codes (see page 1 - "Preparation" section - for details on where to obtain this). B. If schools are not specified on the file, you can uncheck the default option and select the specific school you are importing from the drop down menu.
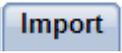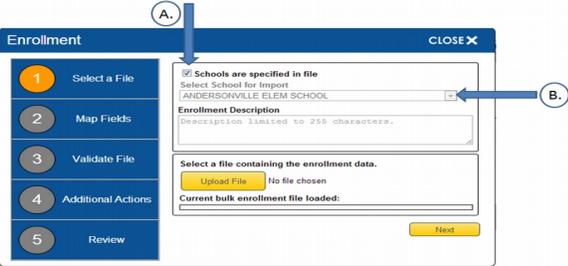
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Select a File (cont.)

Step	Action
5 (cont.)	C. **Optional:** Add a description for the enrollment information that will be uploaded. *Example: First Street ES Student File* D. Click the **Upload File** button to select the .csv file that contains all student and/or staff data for the bulk enrollment import. E. Once all fields have been completed, click **Next.**
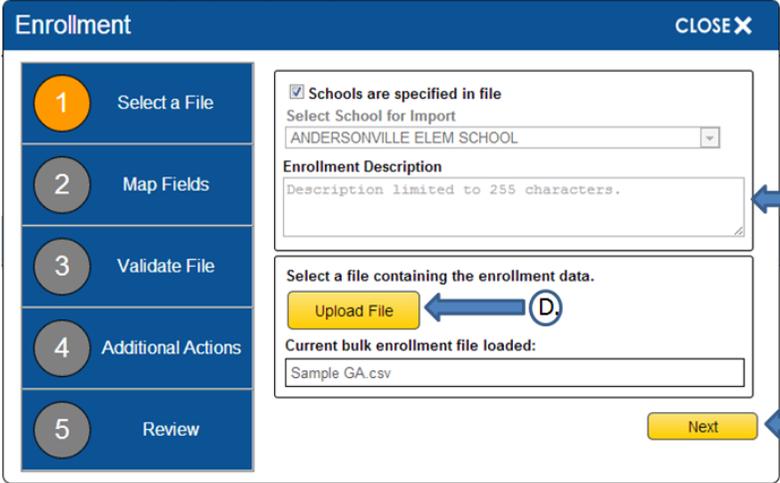
Map Fields

Step	Action
1	On this next screen, match the import fields from the .csv file to the user fields in Classworks. The fields that are required to be matched are denoted by an asterisk (*).

6.7 Enrollment Import, continued

Map Fields

(cont.)

Step	Action
2	

Note: Any fields on your file that matched the Classworks column headings exactly, will be automatically matched for you and will display in this column.

To match the fields from your file, click on the field from the file (right side of the screen) and the Classworks field (left side of the screen) to be matched as shown in the example above. Click the **Match** button.

This process will continue until all required fields have been mapped.

If a column is matched incorrectly, select the incorrectly matched column on the left and click the **Unmatch** button.

Note: Fields with the exact column heading will automatically be matched for you. Any remaining fields that need to be manually matched will be listed on the right side of the screen.

| 3 | Once all required fields have have been matched, click **Next** [Next]

Note: There may be some fields remaining on both sides that have not been matched. As long as all required fields (*) are fulfilled you may move on. |

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Validate File

Step	Action
1	The Validate File screen allows you to review any errors and/or potential issues that exist on your imported file and also provides suggestions on how to resolve them. A. All errors (✖) must be resolved before moving on to the next step in the enrollment process. B. The yellow caution symbol (⚠) indicates an issue has been detected on the file that may cause a problem. Although you can continue, we **highly recommend** fixing the issue before moving forward. *Note:* If errors are found, you will be required to fix the items on the enrollment file. Click **Close X** to exit this screen and begin the process again with the corrected file.
2	If there are no errors, click **Next.** [Next]
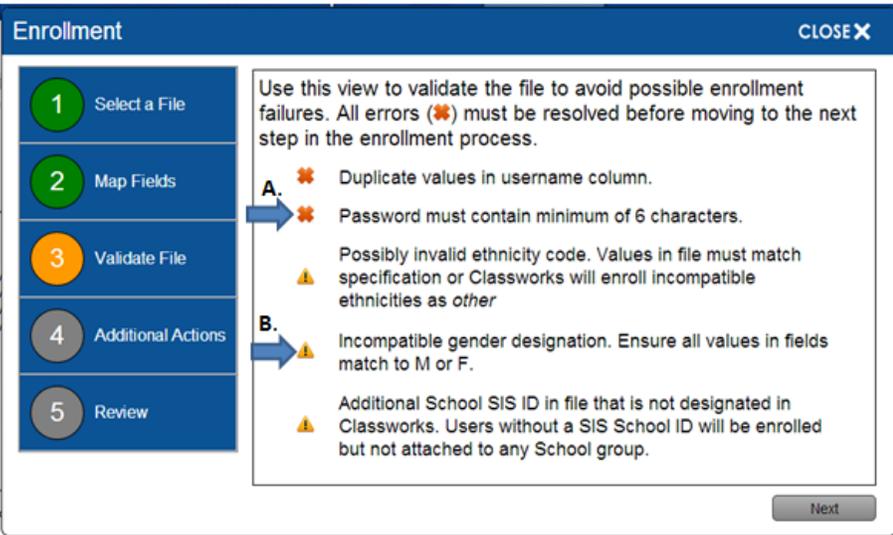
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	Step	**Action**
Additional Actions	**1**	The Additional Actions screen allows you to choose a resolution for any conflicts that may be found during the enrollment process. **What is a conflict?** A conflict occurs when a user on the file is matched with a user already in the Classworks system but there is a field that is different on the file than what is in the system. *Example: Robert Smith is on the import file and Bob Smith is in the Classworks manager. Since the district ID numbers are identical for both users, Classworks identifies these two as the same user and will match them.* **The selections made on this screen tell Classworks how to handle the fact that there is a field different on the file than in the manager** *(in this case, the user's first name).* A. CONFLICT RESOLUTION: "Imported Record Wins" means that when a conflict occurs, the information on your imported file will replace the information already in the Classworks manager. "Existing Record Wins" means that when a conflict occurs, the information already in the manager will NOT be replaced by what is on your imported file. B. MAINTAIN EXISTING USER'S PASSWORD: If a password conflict occurs, "Maintain Password" will keep the password that is already assigned to each user in the Classworks manager. "Overwrite Password" will overwrite the password that is already in the Classworks manager with what is on your import file.

Note: If students do not currently have passwords assigned in the system, you need to select to "Overwrite Password" to ensure student passwords on the file are entered into the system.
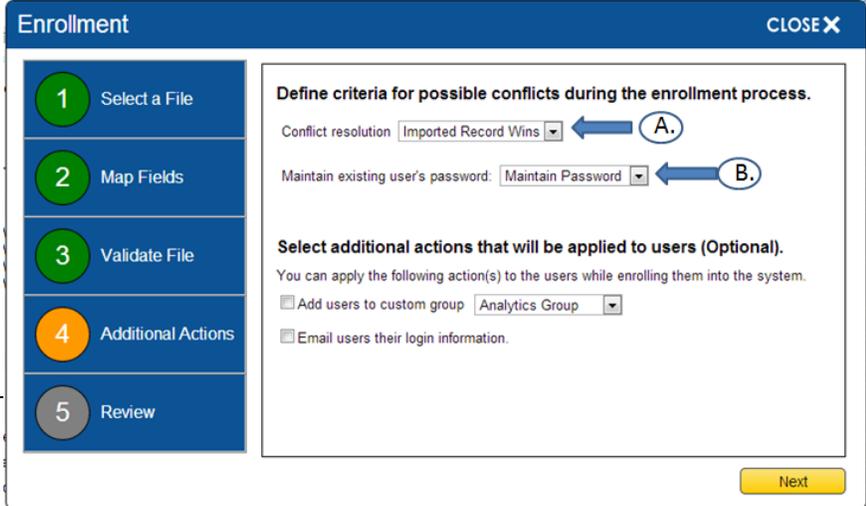
6.7 Enrollment Import, continued

Additional Actions (cont.)

Step	Action
1 (cont.)	**Optional:** These are optional actions that can be performed during the enrollment process. C. ADD USERS TO CUSTOM GROUP: Select this box if you would like the student users to be automatically placed in a custom group within Classworks. ***Note:*** *Custom groups must be created prior. All users on the file will be added to the custom group if this option is selected.* D. EMAIL USERS THEIR LOGIN INFORMATION: Select this box if you would like all staff users to receive their login information by email. ***Note:*** This option requires the email addresses to be included on the enrollment file. *If users do not receive the email, have them check their spam folder. If tagged as spam, please talk to your district tech to prevent this in the future.*
2	Once all options have been selected, click **Next**

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Review

Step	Action
1	This screen allows you to review your selections chosen in steps 1-4. Once you have reviewed all, click **Submit** [Submit] to complete the enrollment process. If you want to change any of your selections, click **Close X** to start the process over from the beginning. ***Note:*** All enrollment processing will be performed during off peak hours. You will receive notification via email once the process has been completed and all users have been enrolled.
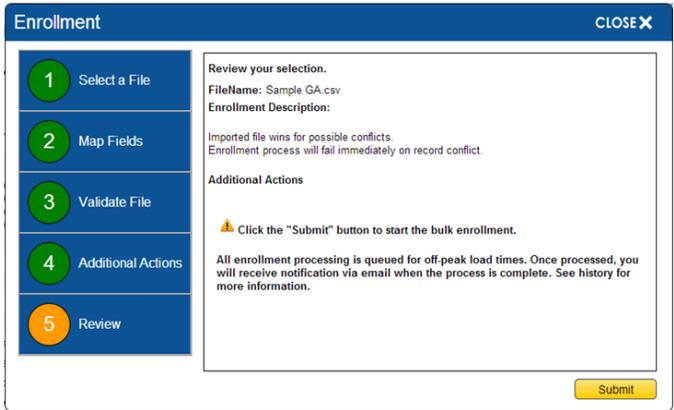
Import History

After submitting the file, you can access the details of the import by navigating back to the **Administration Tab > Import Sub Tab**.

You will see the following:
- Import Number
- Description (if you entered one)
- Type
- Status
- Date Completed

Click on the Import Number to view the details of the import. You also have the option to download a copy of the file that was imported.

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Optional Fields

In addition to the required fields listed on page 1, you can include these optional fields.

Column Name	Values	Staff or Student
Prefix	Alphanumeric, 5 char max	Both
Middle Name	Alphanumeric, 20 char max., hyphen ok	Both
Suffix	Alphanumeric, 5 char max	Both
State User ID*	Alphanumeric, 20 char max.-	Both
Alternate User ID	Alphanumeric, 20 char max	Both
Gender	M or F	Student
Ethnicity (**Note:** The values must be written EXACTLY as shown)	Alphanumeric, 255 char max. Anything other than this list of values will default to "Other": • African American • American Indian/Native Alaskan • Asian/Pacific Islander • Hispanic • White	Student
Disabled	Y/N, True/False, 1/0	Student
Limited English	Y/N, True/False, 1/0	Student
Economically Disadvantaged	Y/N, True/False, 1/0	Student
Migrant	Y/N, True/False, 1/0	Student

*Highly Recommended if you plan to import High Stakes or Third Party testing data