



It's Revolutionary!

Bulk Upload Instructions: *User Data Rules and Guidelines*

As of v1.1.7

Introduction

The following instructions and guidelines have been designed to show you how to properly format teacher and student data and upload it into the Digital Path.

Bulk Uploading: Creating and Importing your Own Data Spreadsheet

Your goal in creating a file for bulk upload is to produce a spreadsheet with a number of rows. Each row represents a teacher (when bulk uploading teachers) or a student (when bulk uploading students). These rows consist of columns, which represent values or fields, each separated from the others with a [TAB]. Each row should end with a [RETURN] or [ENTER] after the last value. This type of file is a "tab-delimited" file.

Spreadsheet programs can save their data as this type of file easily, and student information systems can export in this file format.

If you are using Microsoft® Excel®, use separate templates for **teachers** and **students**, as they are slightly different. If you already have Microsoft® Excel® spreadsheets for your teachers and students, add columns to your existing spreadsheets to match the columns in our templates by following the **rules** listed in this document.

Once you have created your teacher or student spreadsheet, save it as an .xls file. Then <**Save As...**> a tab-delimited (.txt) file. You will use the tab-delimited file to upload your data using the Digital Path's Administrative features.

Adding / Managing Individual Users

If your school or district has chosen to provide teacher-centered access to the Digital Path, teachers create and manage usernames and passwords for themselves and for the students in their classes. It is first recommended that you reference the **Teacher Administrative Access: Registration and Login Steps** document along with these guidelines manage user data.

Whether you bulk upload as an administrator or add and change individual users as a teacher, the guidelines for data found within the **Rules for Bulk Uploading** sections of this document still apply.

Technical Support

If you have any questions about these instructions, please contact Scott Foresman History - Social Science for California Technical Support at (877) 840-7699.

At no additional cost, the Technical Support Team is available to answer questions you may have about formatting your own bulk upload files or using the admintool and planning features to manage users on the Digital Path.

As a premium service, Pearson School Systems can facilitate registration and bulk uploading for your school or district:

Bulk Data Upload Service - For \$700 per school you will be assigned a Pearson School Systems Project Manager, who will work with you to successfully upload your data into the system. If you use SASI® PowerSchool or Chancery as your SIS, you automatically qualify for a 10% discount. Volume discounting is also available.

Data Scrubbing – Some schools may not have the resources or expertise to get the data files in the required format. Data scrubbing will be offered at \$175.00 per hour. An estimated cost will be based on the data and format provided.

Data Entry Service – Data entry is offered at \$40 per hour. An estimate of cost will be based on the data format provided and the number of data sources.

To discuss how Pearson School System data services can meet the needs of your school or district please call 1-800-736-4357, x7997.

Rules for Bulk Uploading Students

The student spreadsheet, at least, should have twelve columns (fields) filled with values. Columns ***must*** be in the following order: **Username, First Name, Last Name, Gender, Street, City, State, Zip, Email, Password, Grade and Student ID**. Carefully follow the rules listed below for each of these fields. There are also six *optional* columns for NCLB demographic data following the twelve mandatory columns. If any data is in the file after the "Is Special Ed" field, the Bulk Upload tool will ignore it.

Mandatory columns:

Username, First Name, Last Name, Gender, Street, City, State, Zip, Email, Password, Grade, Student ID

Optional columns:

Ethnicity, Socioeconomic Status, Is Migrant, Is Disabled, Is ELL, Is Special Ed

Note: Remember to [TAB] to the next field or column if you leave the field or column blank.	
Field Name	Field Description
<p><i>Username</i></p> <p>Character Length: 32</p>	<p>If you do not specify a username, the system will automatically assign a username based upon the first and last name. If this field is blank, you must [TAB] to the next field.</p> <p>The system will not accept duplicate usernames. If you enter a duplicate username, the system will assign a random username automatically. You can derive usernames from your student information system and may be alphanumeric. A suggestion for creating a Username would be to use the student's student ID number followed by a period, District Initials followed by a period, and school initials or school number. Example 123456.abcusd.hes or 123456.abcusd.020. The reason for adding the school initials or school code at the end is if a student moves from one school to another they can be deleted at one school which makes them inactive and you could create them at the next school with the new school initials or school code.</p>
	<p>Characters Allowed</p> <p>- _ .</p> <p>Also alphanumeric characters</p>
<p><i>First Name</i></p> <p>Character Length: 48</p> <p><u>Required</u></p>	<p>The first name of the student.</p>
	<p>Characters Allowed</p> <p>- ' .</p> <p>Also blank spaces and alphanumeric characters.</p>

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Field Name	Field Description
Last Name Character Length: 48 <u>Required</u>	The last name of the student.
	Characters Allowed
	- ' _ Also blank spaces and alphanumeric characters.
Gender <u>Required</u>	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Male ▪ Female ▪ M ▪ F ▪ Unknown
Street Character Length: 75	The school's street address. If this field is blank, you must [TAB] to the next field.
	Characters Allowed
	All
City Character Length: 255	The city the school is located in. If this field is blank, you must [TAB] to the next field.
	Characters Allowed
	- ' . Also blank spaces and alphanumeric characters.
State <u>Required</u>	The state the school is in, California. <u>DO NOT</u> use the abbreviated CA.
Zip <u>Required</u>	Use the school's five-digit zip code. This field is limited to 5 numbers.
Email Character Length: 80	Must be in the format of username@site.com . All domain names, including .edu, are acceptable. If this field is blank, you must [TAB] to the next field.
Password Character Length: 20	If you do not specify a password, the system automatically sets the password to password . This field, if entered, must be more than 1 character. If this field is blank, you must [TAB] to the next field.
	Characters Allowed: Alphanumeric characters only.

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Field Name	Field Description		
Grade <u>Required</u>	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Kindergarten ▪ Grade 1 ▪ Grade 2 ▪ Grade 3 ▪ Grade 4 ▪ Grade 5 		
Student ID Character Length: 32 <u>Required</u>	This is the ID number from your Student Information System or a number you can randomly generate. <table border="1" data-bbox="524 636 1446 758"> <thead> <tr> <th data-bbox="524 636 1446 695">Characters Allowed</th> </tr> </thead> <tbody> <tr> <td data-bbox="524 695 1446 758">All</td> </tr> </tbody> </table>	Characters Allowed	All
Characters Allowed			
All			
Optional Fields If these fields are blank, you must [TAB] through each field.			
Ethnicity	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ American Indian or Alaskan Native ▪ Asian or Pacific Islander ▪ Asian Pacific American ▪ Black ▪ Caucasian ▪ Hispanic ▪ Native American ▪ Native Hawaiian ▪ Not Provided ▪ Other ▪ Subcontinent Asian American 		
Socioeconomic Status	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Disadvantaged ▪ Not Disadvantaged 		
Is Migrant	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Yes ▪ No ▪ Y ▪ N 		
Is Disabled	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Yes ▪ No ▪ Y ▪ N 		

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Optional Fields (continued)

If these fields are blank, you must [TAB] through each field.

Field Name	Field Description
<i>Is ELL</i> <i>English Language Learning</i>	This field must contain one of the following values: <ul style="list-style-type: none">▪ Yes▪ No▪ Y▪ N
<i>Is Special Ed</i>	This field must contain one of the following values: <ul style="list-style-type: none">▪ Yes▪ No▪ Y▪ N

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Rules for Bulk Uploading Teachers

The teacher spreadsheet, at most, should have twelve columns filled with values. Columns ***must*** be in the following order: **Title, Username, First Name, Last Name, Gender, Street, City, State, Zip, Email, Password, and Grade**. Carefully follow the rules listed below for each of these fields.

Mandatory columns:

Title, Username, First Name, Last Name, Gender, Street, City, State, Zip, Email, Password, Grade

Note: Remember to [TAB] to the next field or column if you leave the field or column blank.

Field Name	Field Description		
Title	<p>If a value is specified, it must be one of the following:</p> <ul style="list-style-type: none"> ▪ Mr. ▪ Mrs. ▪ Ms. ▪ Dr. ▪ Miss 		
Username Character Length: 32	<p>If you do not specify a username, the system will automatically assign a username based upon the first and last name. If this field is blank, you must [TAB] to the next field.</p> <p>The system will not accept duplicate usernames. If you enter a duplicate username, the system will assign a random username automatically. You can derive usernames from your student information system and may be alphanumeric. A suggestion for creating a Username would be to use the student's school username followed by a period and the initials of the school or district followed by a period and the school initials or code. For example, ssmith.abcusd.hes or ssmith.abcusd.020 can be used as Sally Smith in ABC Unified School District at Harvard Elementary School. The reason for adding the school initials at the end is if a teacher moves from one school to another they can be deleted at one school which makes them inactive and you could create them a the next school with the new school initials or school code.</p> <table border="1" style="width: 100%; text-align: center;"> <tr> <th>Characters Allowed</th> </tr> <tr> <td> - _ . Also alphanumeric characters </td> </tr> </table>	Characters Allowed	- _ . Also alphanumeric characters
Characters Allowed			
- _ . Also alphanumeric characters			
	<p>The first name of the teacher.</p> <table border="1" style="width: 100%; text-align: center;"> <tr> <th>Characters Allowed</th> </tr> </table>	Characters Allowed	
Characters Allowed			

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Character Length: 48 Required	- ' . Also blank spaces and alphanumeric characters.
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Field Name	Field Description
Last Name Character Length: 48 Required	The last name of the teacher. Characters Allowed - ' . Also blank spaces and alphanumeric characters.
Gender Required	This field must contain one of the following values: <ul style="list-style-type: none"> ▪ Male ▪ Female ▪ M ▪ F ▪ Unknown
Street Character Length: 75	The school's street address. If this field is blank, you must [TAB] to the next field. Characters Allowed All
City Character Length: 255	The city the school is located in. If this field is blank, you must [TAB] to the next field. Characters Allowed - ' . Also blank spaces and alphanumeric characters.
State Required	The state the school is in, California. DO NOT use the abbreviated CA.
Zip Required	Use the school's five-digit zip code. This field is limited to 5 numbers.
Email Character Length: 80	Must be in the format of username@site.com . All domain names, including .edu, are acceptable. If this field is blank, you must [TAB] to the next field.

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<p>Password</p> <p>Character Length: 20</p>	<p>If you do not specify a password, the system automatically sets the password to password. This field, if entered, must be more than 1 character. If this field is blank, you must [TAB] to the next field. By default when teachers are bulk uploaded they have limited administrative rights were they can search and edit students or add students. If you allow this we recommend a semi-strong password for the teachers. If you remove this right you can use a simple password. This right can be turned off by logging in as an administrator and going to planning –my groups- manage users. This will open the Admintool web page. Click on Manage Site Settings- Manage User Settings and uncheck the box for Allow Teacher Access to Manage Users.</p>
<p>Characters Allowed: Alphanumeric characters only.</p>	

Field Name	Field Description
<p>Grade</p> <p><u>Required</u></p>	<p>This field must contain one of the following values:</p> <ul style="list-style-type: none"> ▪ Kindergarten ▪ Grade 1 ▪ Grade 2 ▪ Grade 3 ▪ Grade 4 ▪ Grade 5

User Data Guidelines

File Scan:

When you scan your file for bulk uploading, the Digital Path admintool checks the integrity of the data in the file. This preliminary scan does *not* compare the file to data already in the ASP site database.

Therefore, the scan will only check the file for duplicates and missing fields or incorrect data.

However, as the file is uploaded, if there is a duplicate username already loaded on the global ASP site, the admintool will change the username to a random set of letters, based on the 'global' nature of the user database (there is no pattern).

Tips:

- *Once you have uploaded your user data, encourage teachers to verify their log ins...etc.*
- *Check for duplicate usernames in the file you plan to upload, and add to the first initial as needed.*

Example:

Two teachers at X Elementary in Y District are named Jane Doe and Janice Doe. To ensure log in differentiation, add an initial or extra letter:

jdoe.yusd.030
jadoe.yusd.030

Teachers:

In districts where teachers roam between school sites to teach various classes, consider the following naming convention:

First Initial, Last Name, (.), District Abbreviated, (.), School Code or Initials.

Example:

In the following example, X Elementary is a school within Y District. Add the school code or initial so you can create the same user name at different schools:

jdoe.yusd.030 or **jd**oe.yusd.xes

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Students:

Many students move from one school to another during the school year.

If you did not add the school code or school initials at the end, the Student ID would not make the user unique with the global database at the next school. Therefore, we recommend the following naming convention for students:

Student ID, School District Initials, School Initials or School Code.

Example:

123456.abcusd.030 or 123456.abcusd.xes.

If the student moves to Washington Elementary, it would be:

123456.abcusd.050 or 123456.abcusd.wes.

Remember you cannot move students between schools. When you create a student account at another school for a transfer student, no records follow the student; this is a new user.

Additional Comments:

- Many administrators use the **school mascot** for the last extension of the username instead of the school code or school initials. Example 123456jdoe.tigers.
- While the program provides step-by-step self service data upload instructions for both student and teacher users, the Digital Path *minimally* requires teacher data be uploaded. You can therefore create generic student accounts as a first step in getting acquainted with the digital path. An advantage to generic names for students is the capability to get up and running in a short period, and to work into greater use at a more reasonable pace. Keep in mind that multiple users can log on concurrently with the same Username. However, they obviously cannot use the online assessments and reports.
- There are many optional fields in the student template that are used strictly to support data aggregation / reports. Work with your district to determine which criteria support your instructional goals and which may not be essential to measuring your students' success with the program.

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- When you do a bulk upload, a bulk upload ID is assigned for each bulk upload. This is great for **Students Only**, because the student ID is a mandatory field, changes can be made in a student file and can be uploaded again. Example your initial bulk upload you did not load any of the optional demographic data for your students. The Teachers now decide they want to be able to report on the demographic data. You can now modify your file and add the demographic data and re-bulk upload the file. The system will now modify the records for each student ID number and will not create new users. This is also a quick way to make a password change for all students. **You cannot re-bulk upload a Teacher file.**