User Account Batch Import Tool

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Tool Search: User Account Batch Import Tool

The User Account Batch Import Tool allows schools and districts to import a file which creates Campus user accounts en masse.

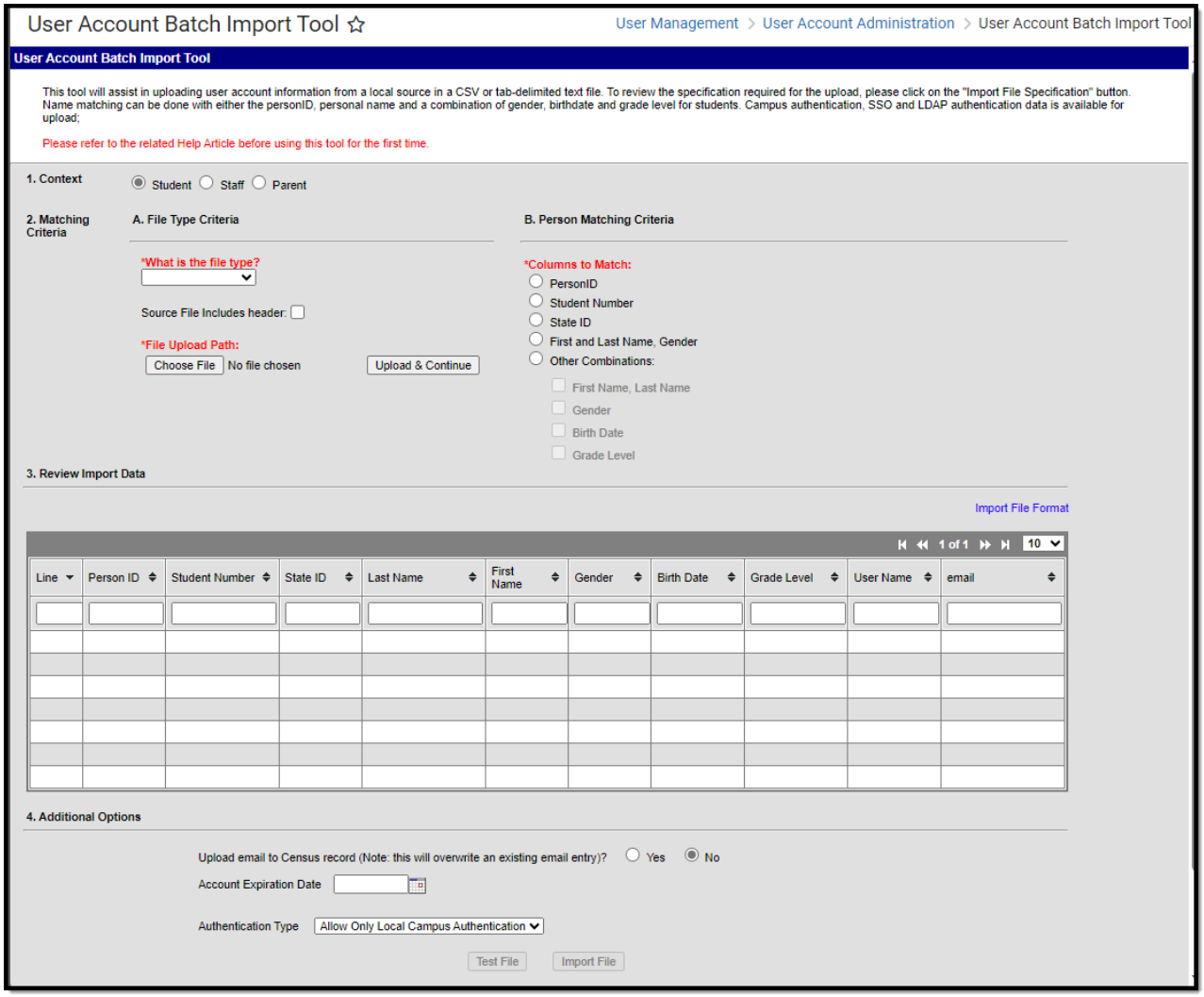


Image 1: User Account Batch Import Tool

Importing User Accounts

In order to properly import and create user accounts, the following steps should be taken:

- Step 1. Create the Import File
- Step 2. Identify the Context of the Import File
- Step 3. Enter Matching Criteria
- Step 4. Review and Test Import Data
- Step 5. Import File Data
- Step 6. Send Activation Emails and/or Letters to Users

Step 1. Create the Import File

The first step is create the file you will use to import and create Campus user accounts. See the File Specifications area for details on file format requirements or click the Import File Format hyperlink on the right-hand side of the tool (see Image 2).

In order to prevent any potential errors, it is important to create the import file in the order defined in the **Import File Format** (see Image 2).

Data is not required in each column however, each column defined in the File Specifications must be present in the import file.

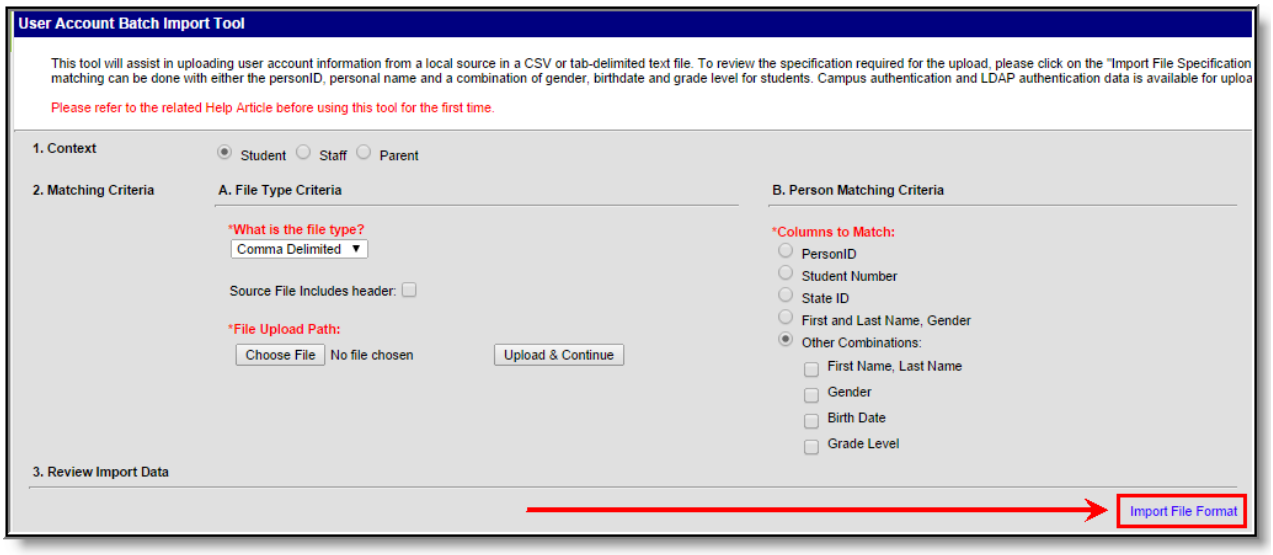


Image 2: Viewing the Import File Format

Step 2. Identify the Context of the Import File

The second step is to identify the Context or type of users who will receive user accounts. When creating user accounts, tool logic looks at information entered in the import file and based on the Columns to Match selected, identifies and matches a person to the user account.

The following describes the requirements necessary for a user to be included per Context option:

- **Student** - A student must have a current enrollment record or have had an enrollment record in the active school year.
- **Staff** - Staff members must have an active District Assignment record.
- **Parent** - Parents must be marked as Guardian within a student's household

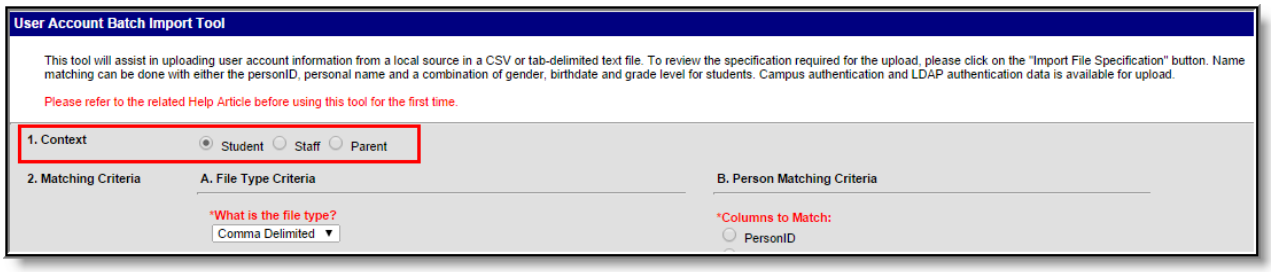


Image 3: Selecting a Context

For example, the table below shows the matching criteria available based on the Context selected.

Student	Staff	Parent
B. Person Matching Criteria *Columns to Match: PersonID Student Number State ID First and Last Name, Gender Other Combinations: First Name, Last Name Gender Birth Date Grade Level	B. Person Matching Criteria *Columns to Match: PersonID Staff Number Staff State ID First and Last Name, Gender Other Combinations: First Name, Last Name Gender Birth Date School Number	B. Person Matching Criteria *Columns to Match: PersonID First and Last Name, Gender Other Combinations: First Name, Last Name Gender Birth Date

Step 3. Enter Matching Criteria

Once a Context has been selected, enter matching criteria. Use the table below as guidance.

Match criteria is available based on the Context selected. See the images below Image 3 for examples of available options per Context selected.

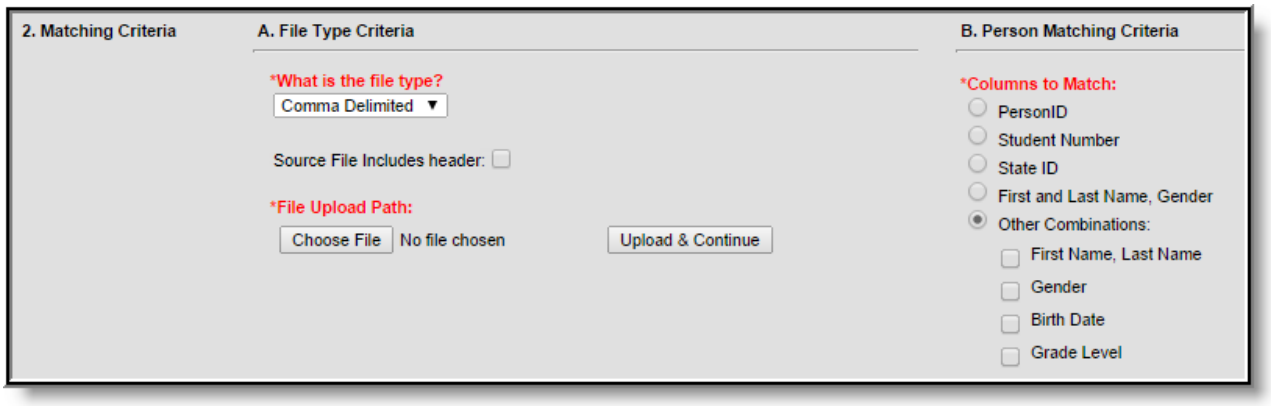


Image 4: Entering Matching Criteria

Field	Description
What is the file type?	Indicates if the import file was formatted as comma or tab delimited. See the File Specifications section for more information on how to build the import file.
Source File Includes header	If the import file includes a header, mark this checkbox.
Columns to Match	**PersonID -** If selected, import logic will use personID to match import file data to people within Campus. This is an option in the specification, meaning the personID as it exists within Campus. This field is only relevant if data entered is Campus personID data.
	Student Number - If selected, import logic will use Student Number to match import file data to people within Campus. (Only available for a Context of Student)
	Staff Number - If selected, import logic will use Staff Number to match import file data to people within Campus. (Only available for a Context of Staff)
	State ID - If selected, import logic will use Student State ID to match import file data to people within Campus. (Only available for a Context of Student)
	Staff State ID - If selected, import logic will use Staff State ID to match import file data to people within Campus. (Only available for a Context of Staff)
	First and Last Name, Gender - If selected, import logic will use a combination of first name, last name and gender to match import file data to people within Campus.
	Other Combinations - More than one combination value can be selected. • **First Name, Last Name** - If selected, import logic will use a combination of first name and last name (and any other combination value selected) to match import file data to people within Campus. • **Gender** - If selected, import logic will use gender (and any other combination value selected) to match import file data to people within Campus. • **Birth Date** - If selected, import logic will use birth date (and any other combination value selected) to match import file data to people within Campus. • **Grade Level** - If selected, import logic will use grade level (and any other combination value selected) to match import file data to students within Campus. • **School Number** - If selected, import logic will use school number (and any other combination value selected) to match import file data to staff within Campus.
File Upload Path	**Choose File -** Select this button and locate the import file.

Field	Description
	Upload & Continue - Once the file has been added, select this button to import the file into the tool and begin review of file data.

Step 4. Review and Test Import Data

The fourth step is to review the import data to ensure it's correct and test the file to ensure user accounts were created appropriately.

Import the file by selecting the **Choose File** field and selecting the file on your hard drive or network storage. Once selected, click **Upload & Continue**. The Review Import Data table will populate with data from the import file (see Image 5). Review data by searching per column or reviewing data per page.

File headings will differ based on the Context selected.

- For the **Student** context - column three becomes Student Number and column nine becomes Grade Level.
- For the **Staff** context - column three becomes Staff Number and column nine becomes School Number.
- For the **Parent** context - columns three, four and nine disappear.

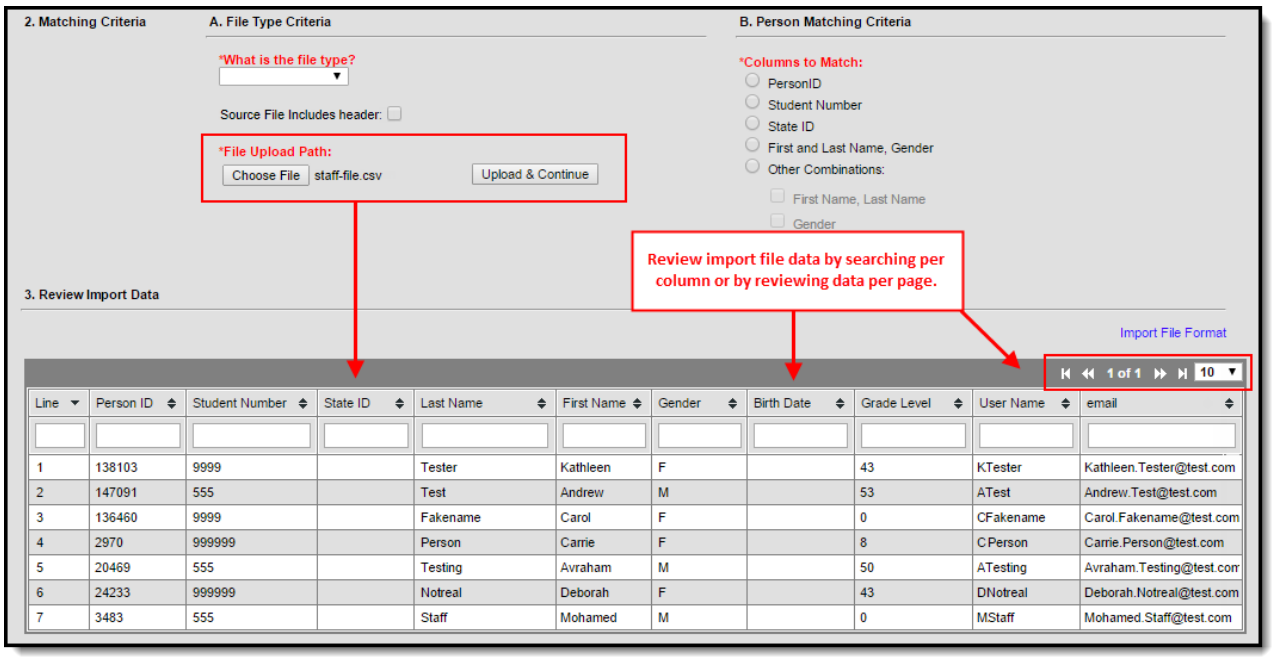


Image 5: Uploading and Reviewing File Data

Once data has been reviewed, click the **Test File** button. The tool will perform a test import and display results (including errors) in a separate window (see Image 6).

No data is written to the database when performing a test of the file.

If errors are reported, correct these errors within the file and test the file again. Once you are satisfied with test results, move on to Step 5.

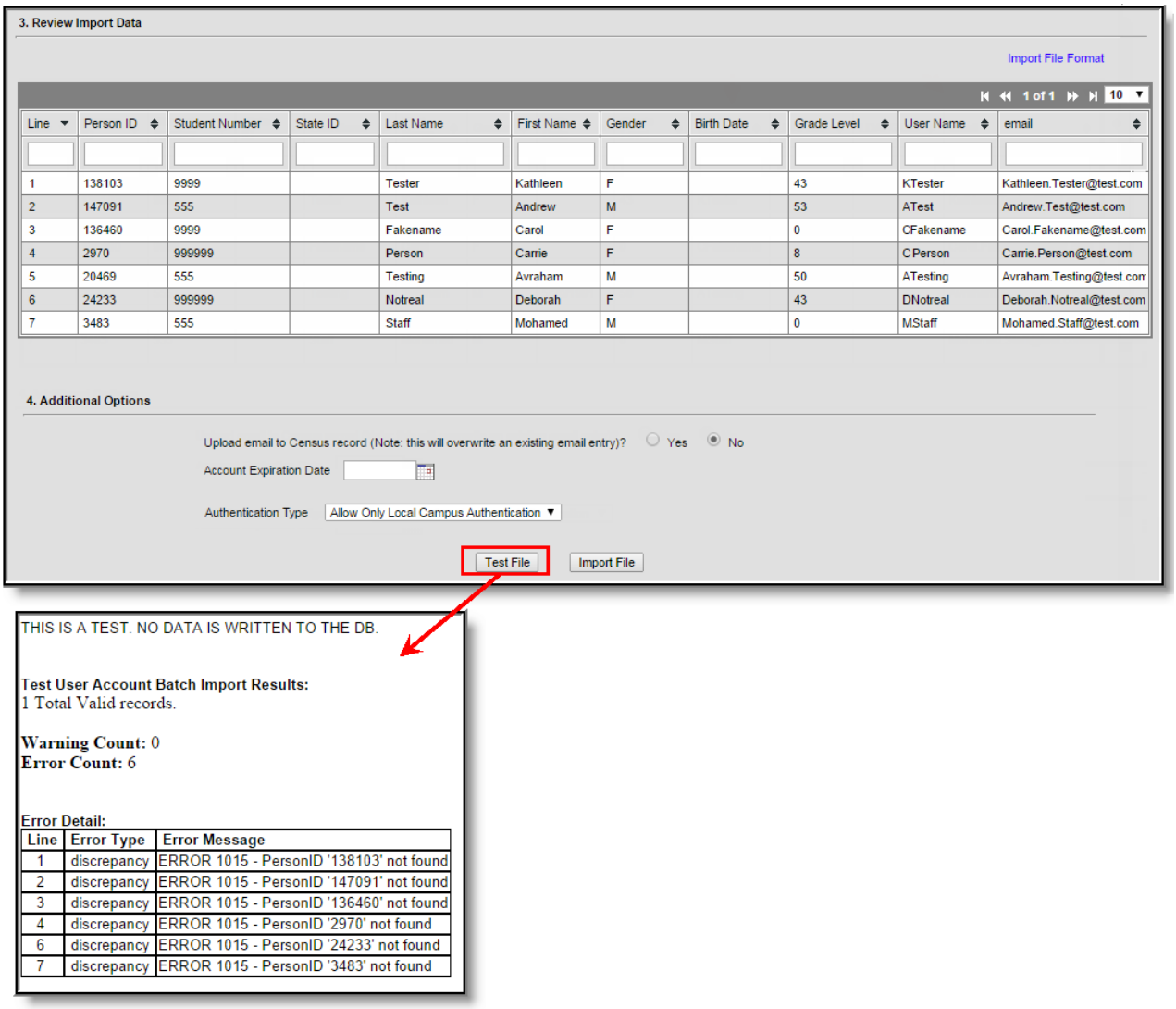


Image 6: Reviewing Test Results

Step 5. Import File Data

Once file data has been reviewed and deemed ready for importing, consider the following options before selecting the Import File button:

Field	Description

Field	Description
Upload email to Census record	Selecting the Yes radio button means all email addresses within the file will overwrite each person's existing email addresses currently stored within the Census module of Campus. Only email addresses matching new Campus accounts being added will have email addresses uploaded and overwritten within Campus. Email addresses of existing users will not be modified.
Account Expiration Date	If you would like to set an expiration date for all user accounts created after the file is imported, enter the date in this field.
Authentication Type (if SAML SSO or LDAP is enabled)	If SAML SSO or LDAP authentication is enabled, select whether to use Local Campus Authentication (Campus username and password), SAML SSO Authentication, or LDAP Authentication when creating each account For more information about SAML SSO functionality, see the SSO Service Provider Configuration article. For more information about LDAP, see the LDAP Authentication article.

Once options have been determined and you are ready to import, select the **Import File** button.

Importing a file does **NOT** update existing information within the Campus database. This tool creates Campus user accounts for all users within the file if they do not currently have a Campus user account. Data within the import file is used to match existing Campus users to the Campus user account created.

There is one exception to this rule: If the **Upload email to census record** option is set to Yes, all email addresses in the file will be imported into the Campus database, overwriting existing data.

Also, if the username in the import file differs from the one in Campus, a new username will be created and made active for the corresponding user account.

Authentication Type is available only to users with SAML SSO and/or LDAP enabled.

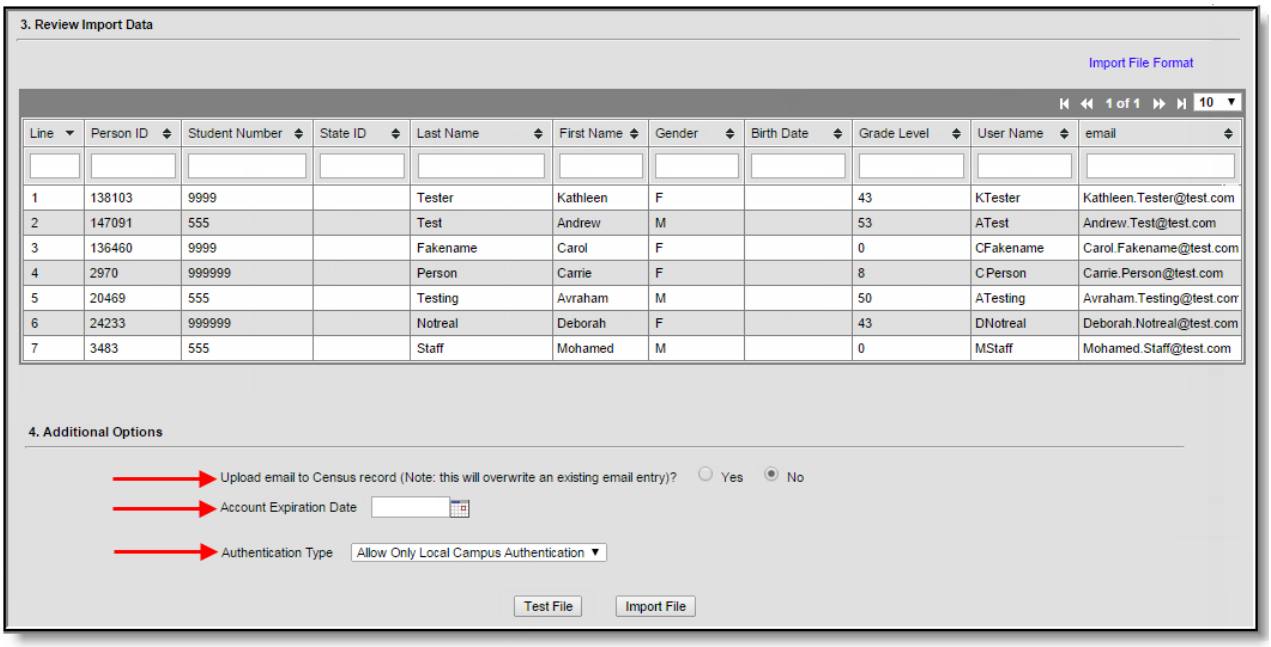


Image 7: Importing File Data

The User Account Batch Import Results window will appear, indicating how many user accounts were created and the Ad hoc filter created (Image 8). The Ad hoc filter created includes all people who just had a user account created and should now be alerted to activate their accounts, as mentioned in Step 6.

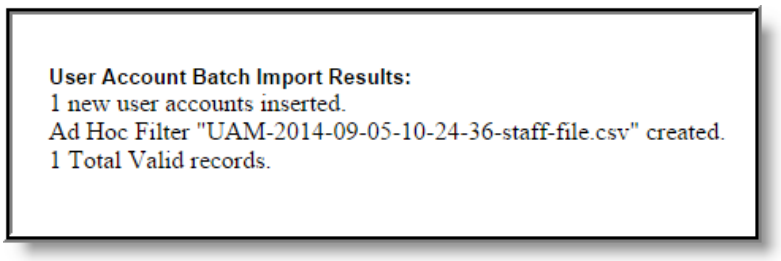


Image 8: Import Results

Step 6. Send Activation Emails and/or Letters to Users

Once user accounts have been created, emails and/or letters MUST be sent to each user informing them of their Campus account username and activation URL. This process can be completed via the Account Letter Builder and User Account Messenger tools.

- **Account Letter Builder Process:** See the Building Activation Letters for Newly Imported/Created Campus Portal Accounts and Build Activation Messages for Newly Imported/Created Campus Portal Accounts sections for more information on building account activation letters.

- **User Account Messenger Process:** Please see the Informing Users of Newly Created User Accounts section for more information on sending emails or letters to users.

Failure to send activation emails and/or letters to these users will result in them not knowing their credentials and thus being unable to log in to their Campus account.

File Specifications

The following file specifications should be used when creating the import file.

Data is not required in each column; however, each column defined in the File Specifications must be present in the import file.

Column Name	Column Type	Column Size	Required	Required Value	Default Value
personID	integer		No		NULL
studentNumber	varchar	15	No		NULL
stateID	varchar	20	No		NULL
lastName	varchar	40	No	Variant String	NULL
firstName	varchar	35	No	Variant String	NULL
gender	varchar	1	No	F / M	NULL
birthDate	smalldatetime		No	MM/DD/YYYY	NULL
gradeLevel	varchar	4	No	Variant String	NULL
username	varchar	50	Yes		NOT NULL
email	varchar	200	No		NULL

For parent data to import properly, the parent must have a relationship to a student with the Guardian checkbox marked in the Relationships tool in Campus.

The image below is an example of a comma-delimited import file (created in Microsoft Excel):

138103	9999		Tester	Kathleen	F		43	KTester		Kathleen.Tester@test.com
147091	555		Test	Andrew	M		53	ATest		Andrew.Test@test.com
136460	9999		Fakename	Carol	F		0	CFakename		Carol.Fakename@test.com
2970	999999		Person	Carrie	F		8	CPerson		Carrie.Person@test.com
20469	555		Testing	Avraham	M	#########	50	ATesting		Avraham.Testing@test.com
24233	999999		Notreal	Deborah	F		43	DNotreal		Deborah.Notreal@test.com
3483	555		Staff	Mohamed	M		0	MStaff		Mohamed.Staff@test.com

Image 9: Example of a Comma-Delimited Import File