SCRIBE Import Webinar #2 Services & Participation

Tuesday, June 11

Allie Sheldon

xcalibur

Agenda

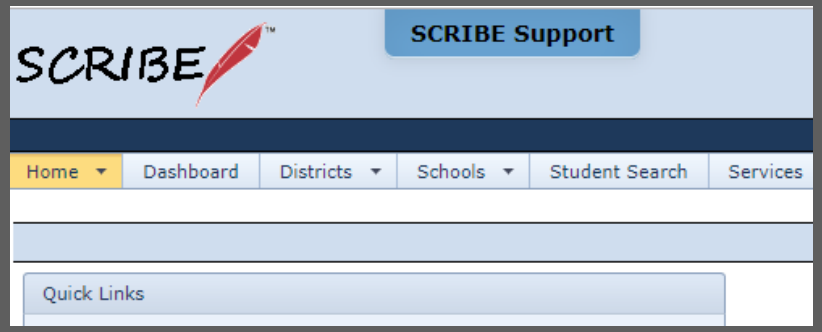
New import module

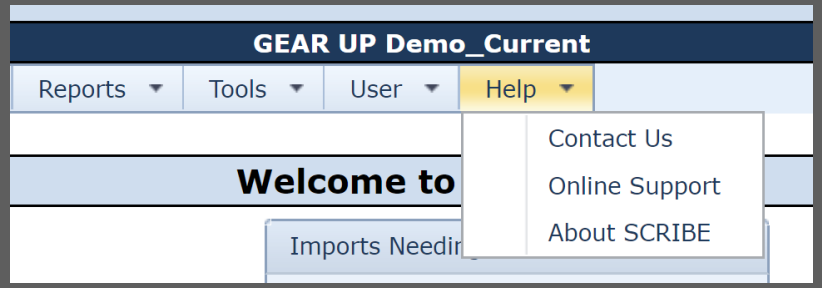
July 1

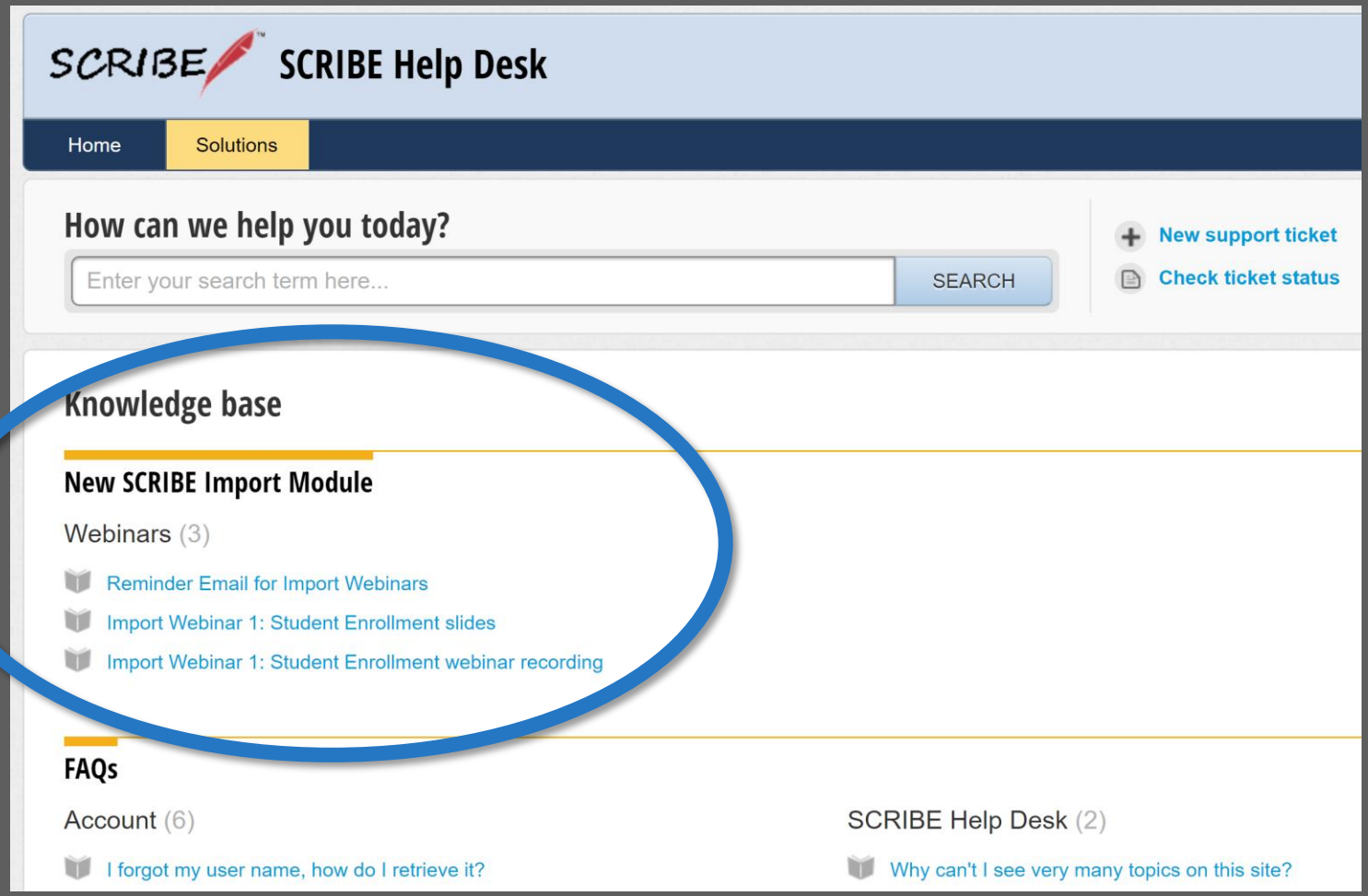
- Introduce new import look
- Participation
  - Import
  - Import with errors, how to fix errors
- Services
  - Import
- Questions – type into chat

- Recording and slides will be posted in SCRIBE Help Desk

SCRIBE Help Desk



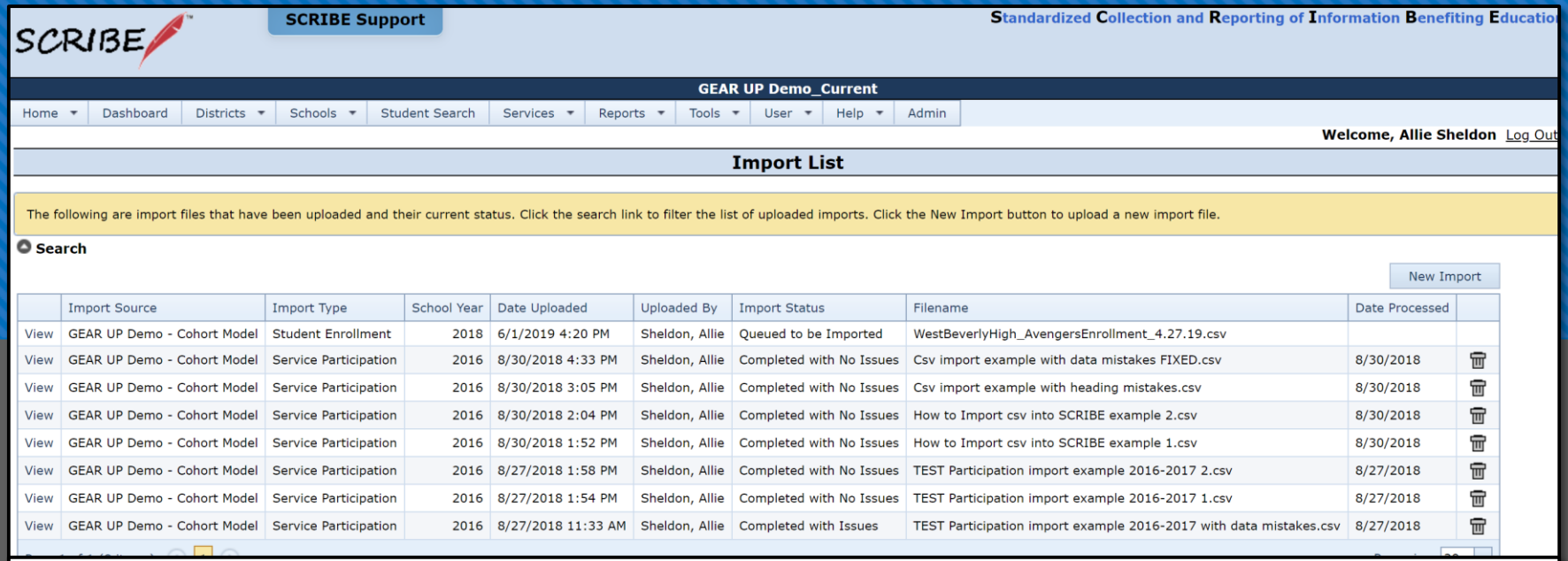




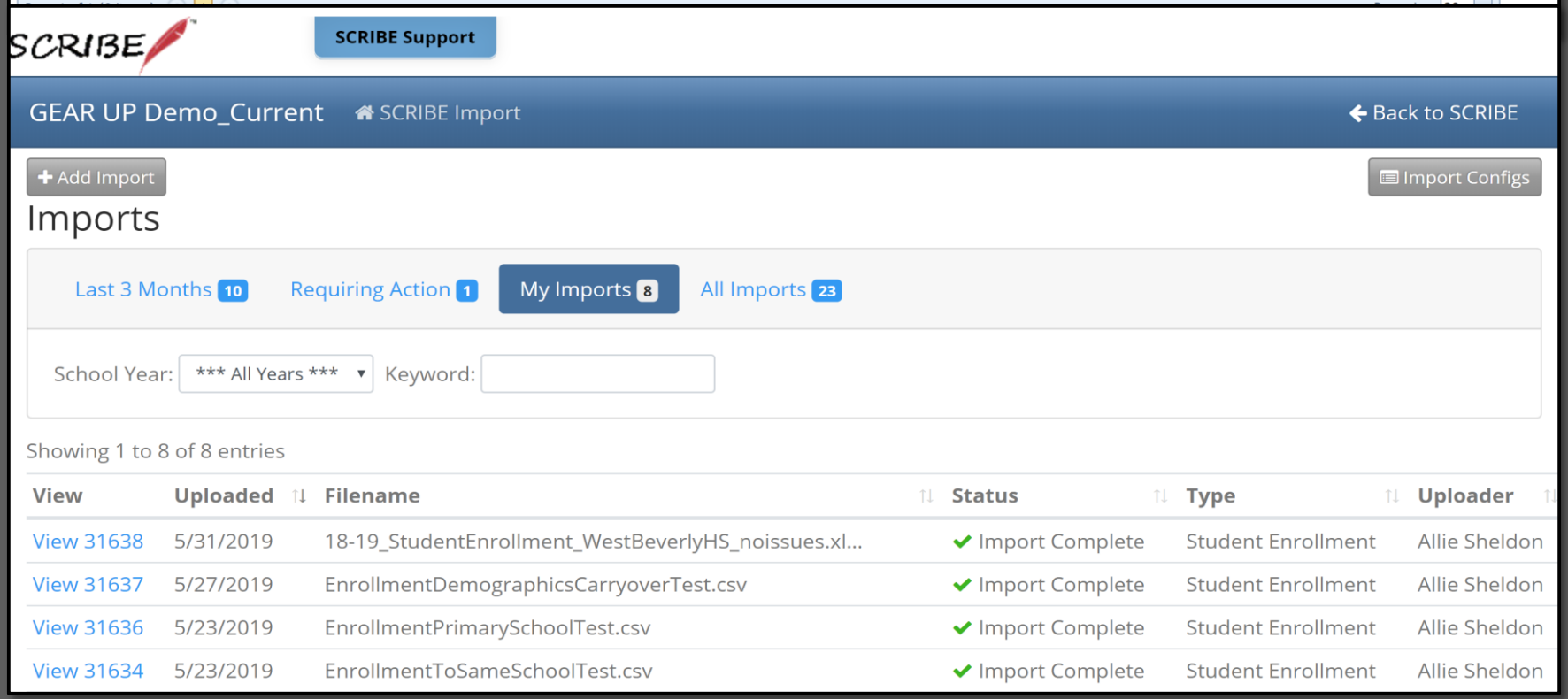
Any questions?

Similarities

- Headings
- View



	Import Source	Import Type	School Year	Date Uploaded	Uploaded By	Import Status	Filename	Date Processed
View	GEAR UP Demo - Cohort Model	Student Enrollment	2018	6/1/2019 4:20 PM	Sheldon, Allie	Queued to be Imported	WestBeverlyHigh_AvengersEnrollment_4.27.19.csv	
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/30/2018 4:33 PM	Sheldon, Allie	Completed with No Issues	Csv import example with data mistakes FIXED.csv	8/30/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/30/2018 3:05 PM	Sheldon, Allie	Completed with No Issues	Csv import example with heading mistakes.csv	8/30/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/30/2018 2:04 PM	Sheldon, Allie	Completed with No Issues	How to Import csv into SCRIBE example 2.csv	8/30/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/30/2018 1:52 PM	Sheldon, Allie	Completed with No Issues	How to Import csv into SCRIBE example 1.csv	8/30/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/27/2018 1:58 PM	Sheldon, Allie	Completed with No Issues	TEST Participation import example 2016-2017 2.csv	8/27/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/27/2018 1:54 PM	Sheldon, Allie	Completed with No Issues	TEST Participation import example 2016-2017 1.csv	8/27/2018
View	GEAR UP Demo - Cohort Model	Service Participation	2016	8/27/2018 11:33 AM	Sheldon, Allie	Completed with Issues	TEST Participation import example 2016-2017 with data mistakes.csv	8/27/2018



View	Uploaded	Filename	Status	Type	Uploader
View 31638	5/31/2019	18-19_StudentEnrollment_WestBeverlyHS_noissues.xl...	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31637	5/27/2019	EnrollmentDemographicsCarryoverTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31636	5/23/2019	EnrollmentPrimarySchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31634	5/23/2019	EnrollmentToSameSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon

Differences

- No Search
- No trashcan
- No Tabs

(Back to SCRIBE)

SCRIBE

SCRIBE Support

GEAR UP Demo_Current | SCRIBE Import | Back to SCRIBE

+ Add Import

Import Configs

Imports

Last 3 Months 10 | Requiring Action 1 | My Imports 8 | All Imports 23

School Year: *** All Years *** Keyword:

Showing 1 to 8 of 8 entries

View	Uploaded	Filename	Status	Type	Uploader
View 31638	5/31/2019	18-19_StudentEnrollment_WestBeverlyHS_noissues.xl...	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31637	5/27/2019	EnrollmentDemographicsCarryoverTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31636	5/23/2019	EnrollmentPrimarySchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31634	5/23/2019	EnrollmentToSameSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31633	5/23/2019	EnrollmentToNewSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31622	4/29/2019	CourseList_Import_statisticstest.csv	✔ Import Complete	Course List	Allie Sheldon
View 31618	4/29/2019	WestBeverlyHigh_CourseList_4.29.19.csv	✔ Import Complete	Course List	Allie Sheldon

SCRIBE

SCRIBE Support

GEAR UP Demo_Current | SCRIBE Import | Back to SCRIBE

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View 31636	5/23/2019	EnrollmentPrimarySchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31634	5/23/2019	EnrollmentToSameSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31633	5/23/2019	EnrollmentToNewSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31622	4/29/2019	CourseList_Import_statisticstest.csv	✔ Import Complete	Course List	Allie Sheldon
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SCRIBE

SCRIBE Support

GEAR UP Demo_Current | SCRIBE Import | Back to SCRIBE

+ Add Import

Import Configs

Imports

Last 3 Months 10 | Requiring Action 1 | My Imports 8 | All Imports 23

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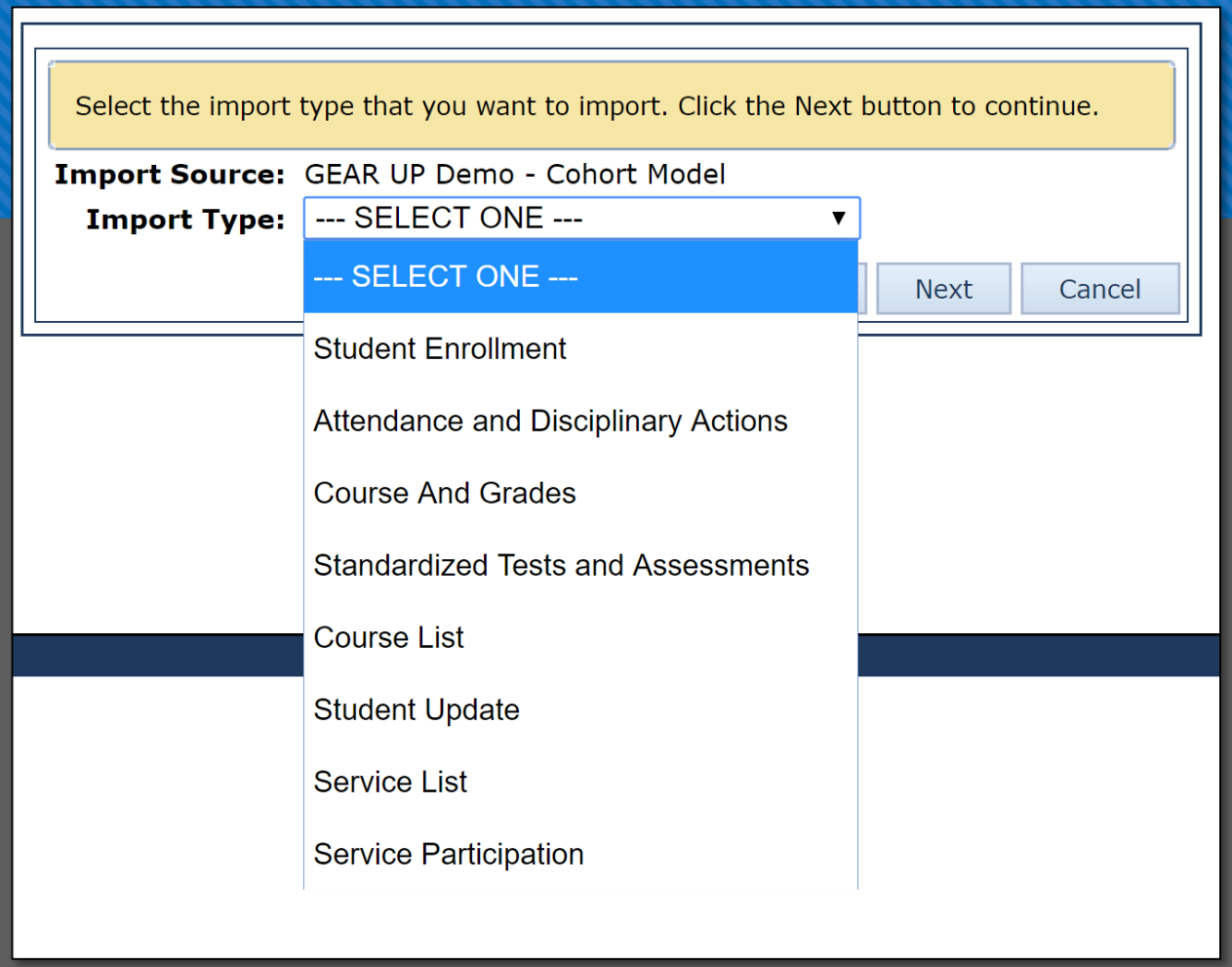
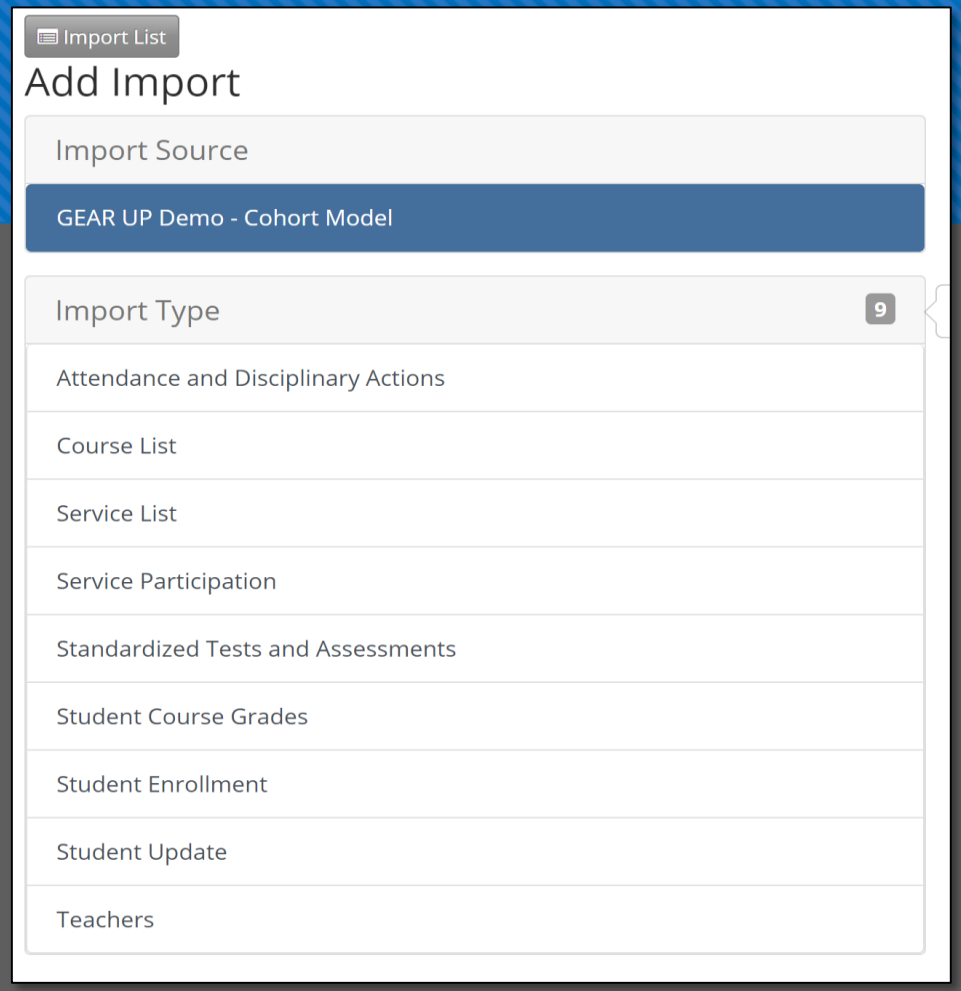
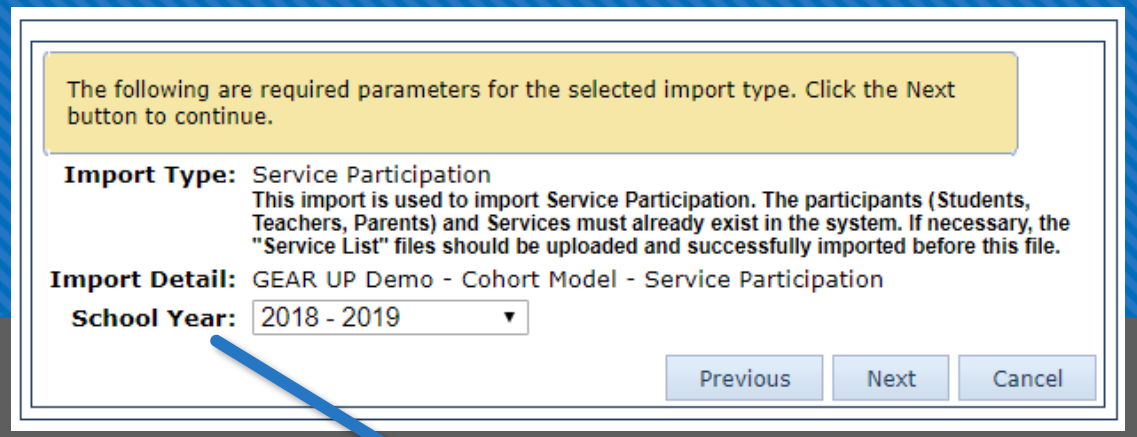
View 31637	5/27/2019	EnrollmentDemographicsCarryoverTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31636	5/23/2019	EnrollmentPrimarySchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31634	5/23/2019	EnrollmentToSameSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31633	5/23/2019	EnrollmentToNewSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31622	4/29/2019	CourseList_Import_statisticstest.csv	✔ Import Complete	Course List	Allie Sheldon
View 31618	4/29/2019	WestBeverlyHigh_CourseList_4.29.19.csv	✔ Import Complete	Course List	Allie Sheldon

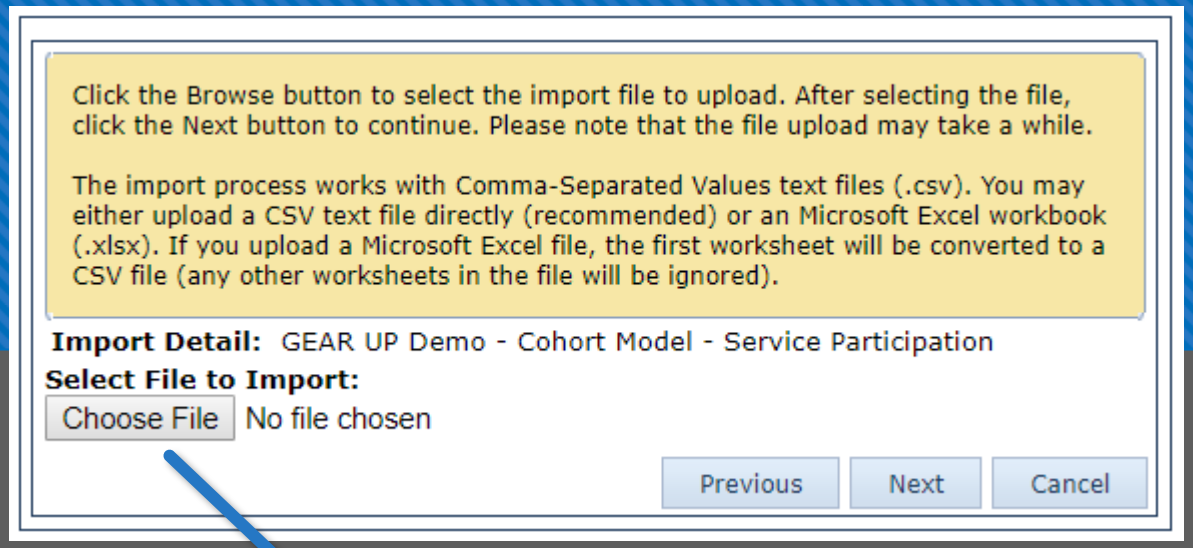


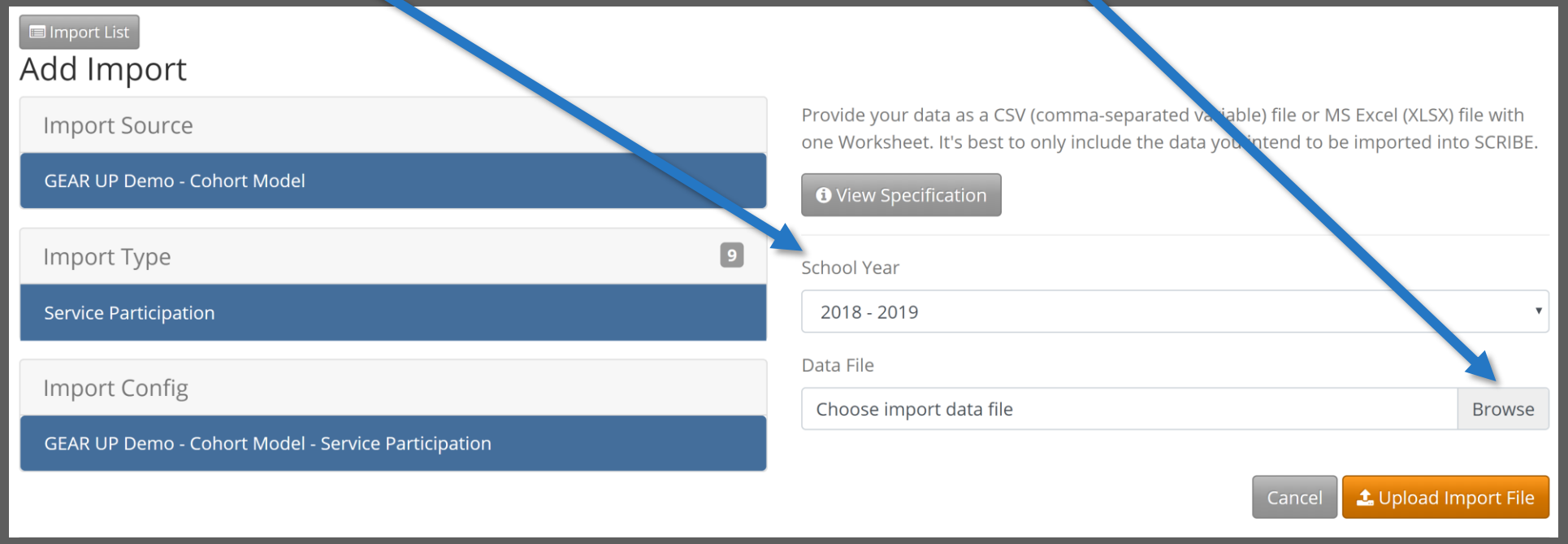
- Select Import Type from dropdown
- Click Next

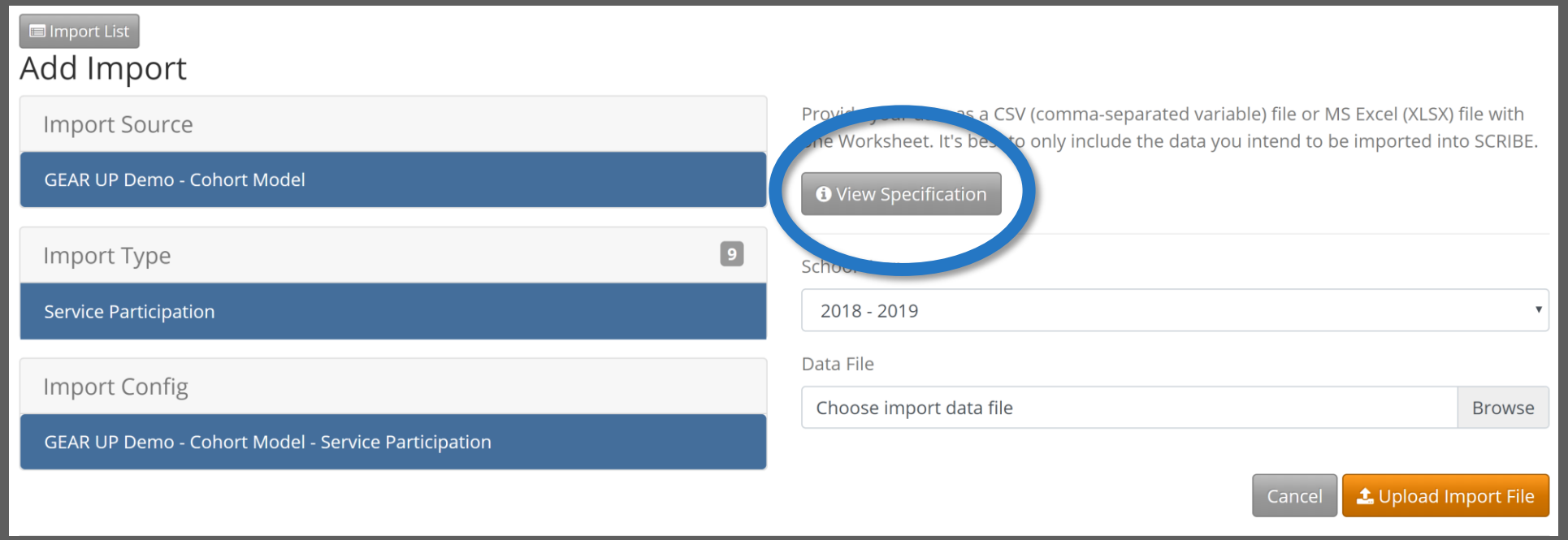


- Select Import Type from list
- Will advance to next step automatically


The following are required parameters for the selected import type. Click the Next button to continue.
Import Type: Service Participation
This import is used to import Service Participation. The participants (Students, Teachers, Parents) and Services must already exist in the system. If necessary, the "Service List" files should be uploaded and successfully imported before this file.
Import Detail: GEAR UP Demo - Cohort Model - Service Participation
School Year: 2018 - 2019
Previous
Next
Cancel


Click the Browse button to select the import file to upload. After selecting the file, click the Next button to continue. Please note that the file upload may take a while.
The import process works with Comma-Separated Values text files (.csv). You may either upload a CSV text file directly (recommended) or an Microsoft Excel workbook (.xlsx). If you upload a Microsoft Excel file, the first worksheet will be converted to a CSV file (any other worksheets in the file will be ignored).
Import Detail: GEAR UP Demo - Cohort Model - Service Participation
Select File to Import:
Choose File
No file chosen
Previous
Next
Cancel


Import List
Add Import
Import Source
GEAR UP Demo - Cohort Model
Import Type
9
Service Participation
Import Config
GEAR UP Demo - Cohort Model - Service Participation
Provide your data as a CSV (comma-separated variable) file or MS Excel (XLSX) file with one Worksheet. It's best to only include the data you intend to be imported into SCRIBE.
View Specification
School Year
2018 - 2019
Data File
Choose import data file
Browse
Cancel
Upload Import File


Import List
Add Import
Import Source
GEAR UP Demo - Cohort Model
Import Type
9
Service Participation
Import Config
GEAR UP Demo - Cohort Model - Service Participation
as a CSV (comma-separated variable) file or MS Excel (XLSX) file with
Worksheet. It's be to only include the data you intend to be imported into SCRIBE.
View Specification
2018 - 2019
Data File
Choose import data file
Browse
Cancel
Upload Import File

Import Specification

GEAR UP Demo - Cohort Model - Service Participation

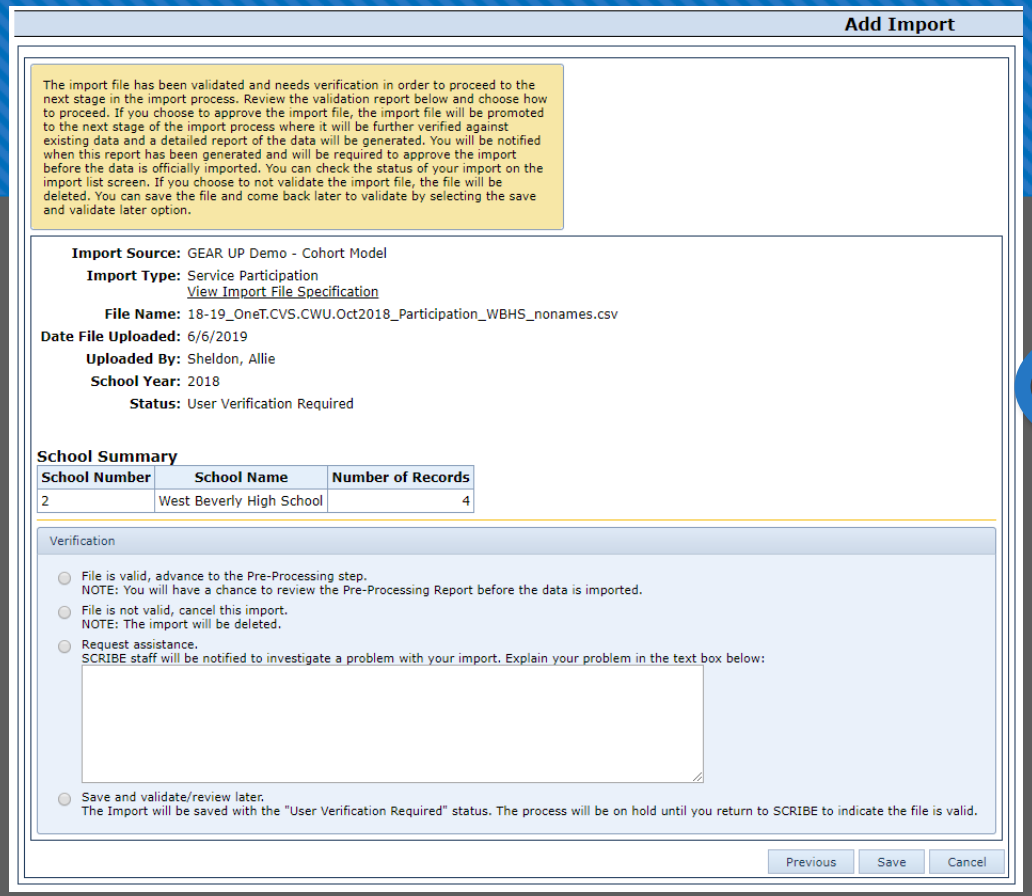
This import is used to import Service Participation. The participants (Students, Teachers, Parents) and Services must already exist in the system. If necessary, the "Service List" files should be uploaded and successfully imported before this file.

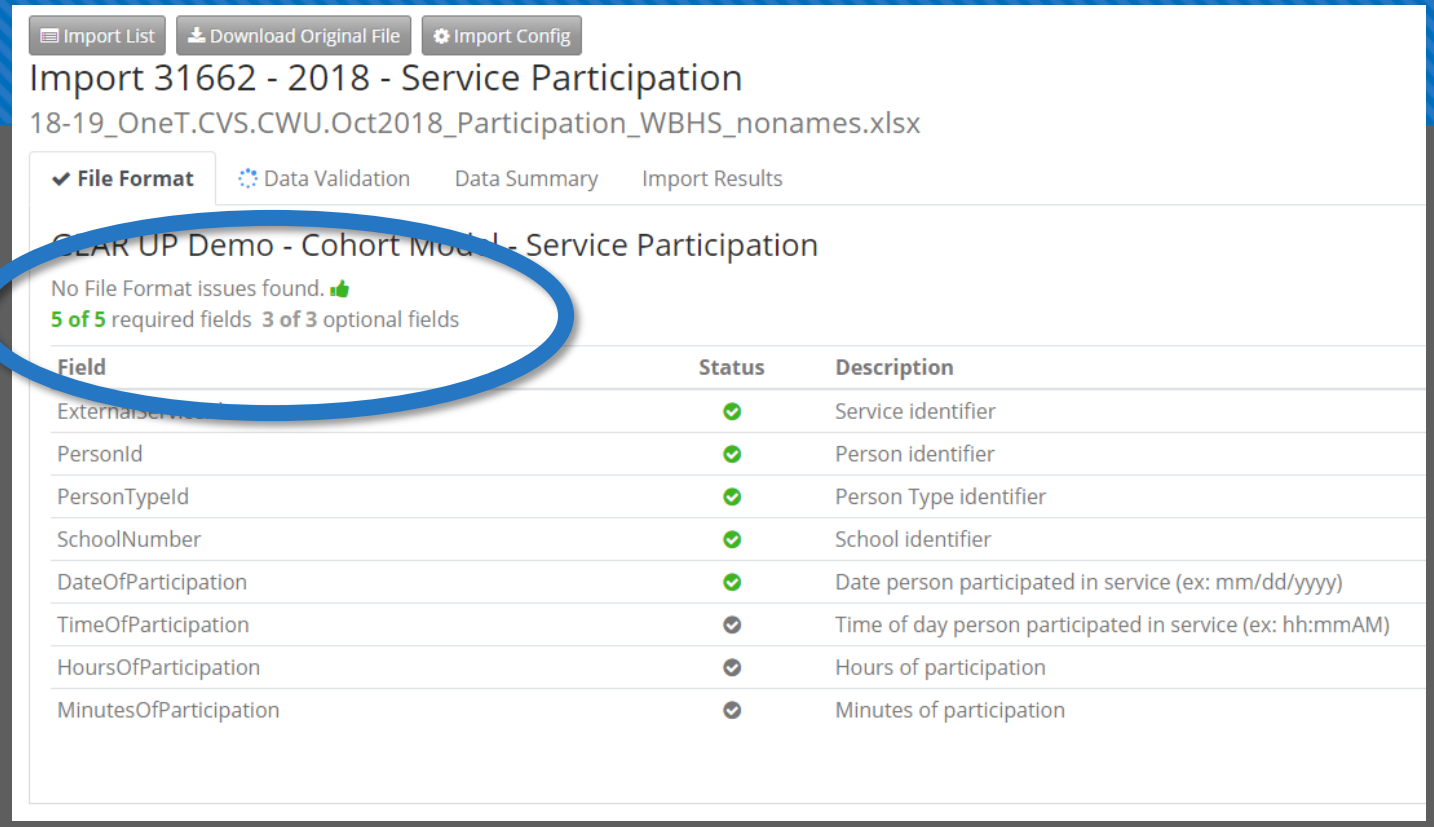
* = Required - field must be in your file
○ = Optional - field should only be in your file if you are providing values

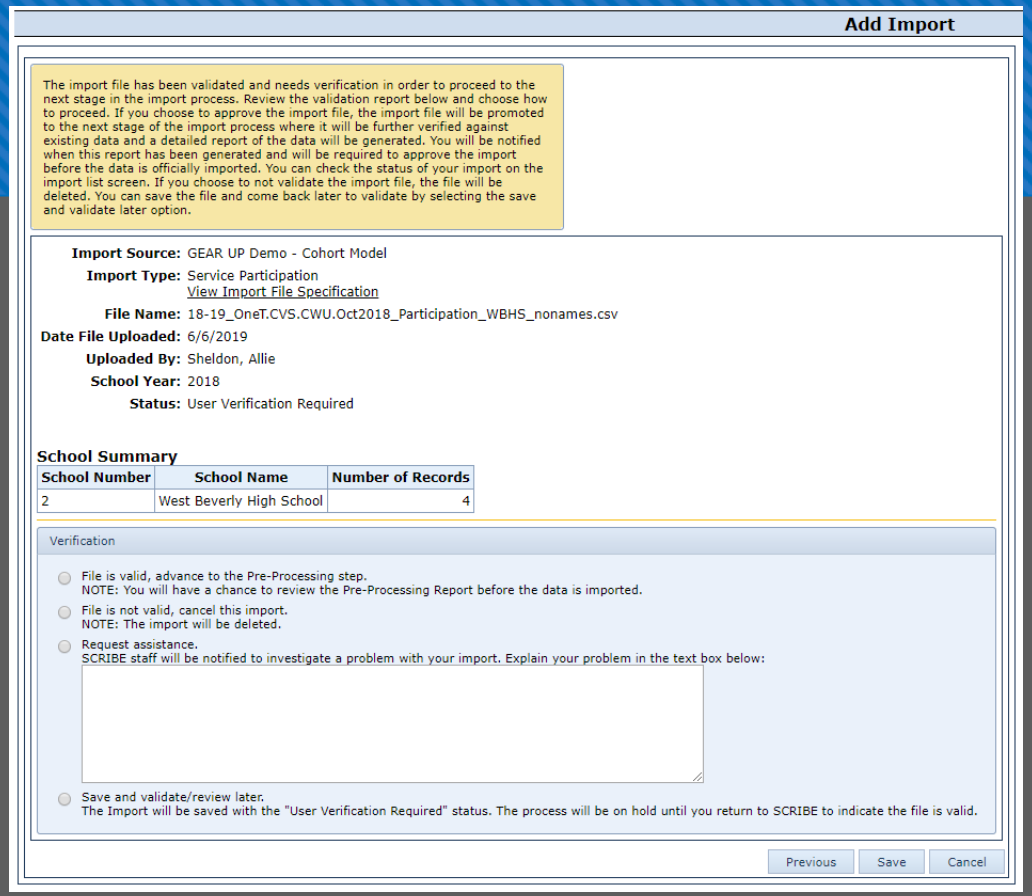
Field	Status	Description
ExternalServiceId	*	Service identifier
PersonId	*	Person identifier
PersonTypeId	*	Person Type identifier
SchoolNumber	*	School identifier
DateOfParticipation	*	Date person participated in service (ex: mm/dd/yyyy)
TimeOfParticipation	○	Time of day person participated in service (ex: hh:mmAM)
HoursOfParticipation	○	Hours of participation
MinutesOfParticipation	○	Minutes of participation

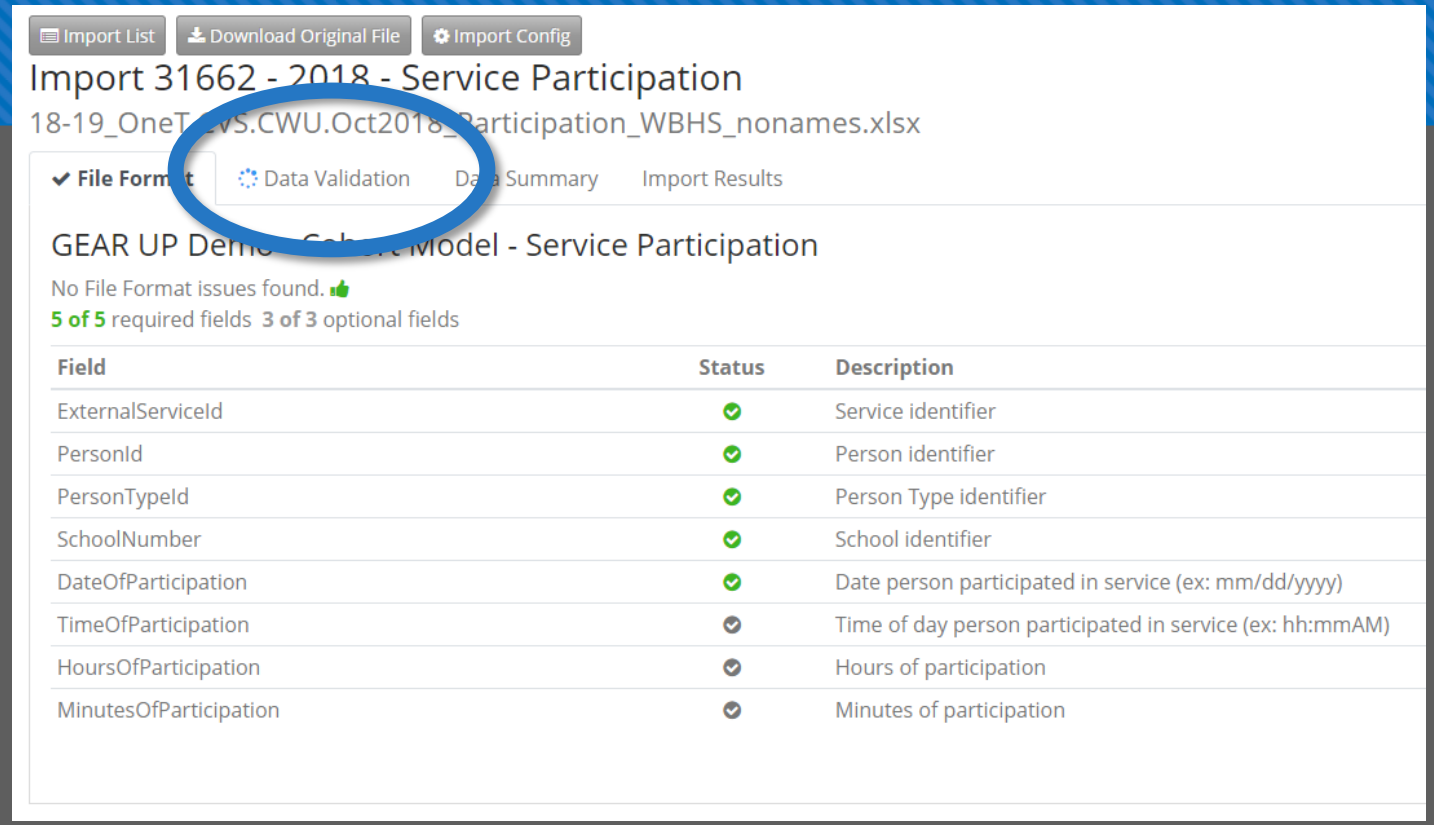
Close

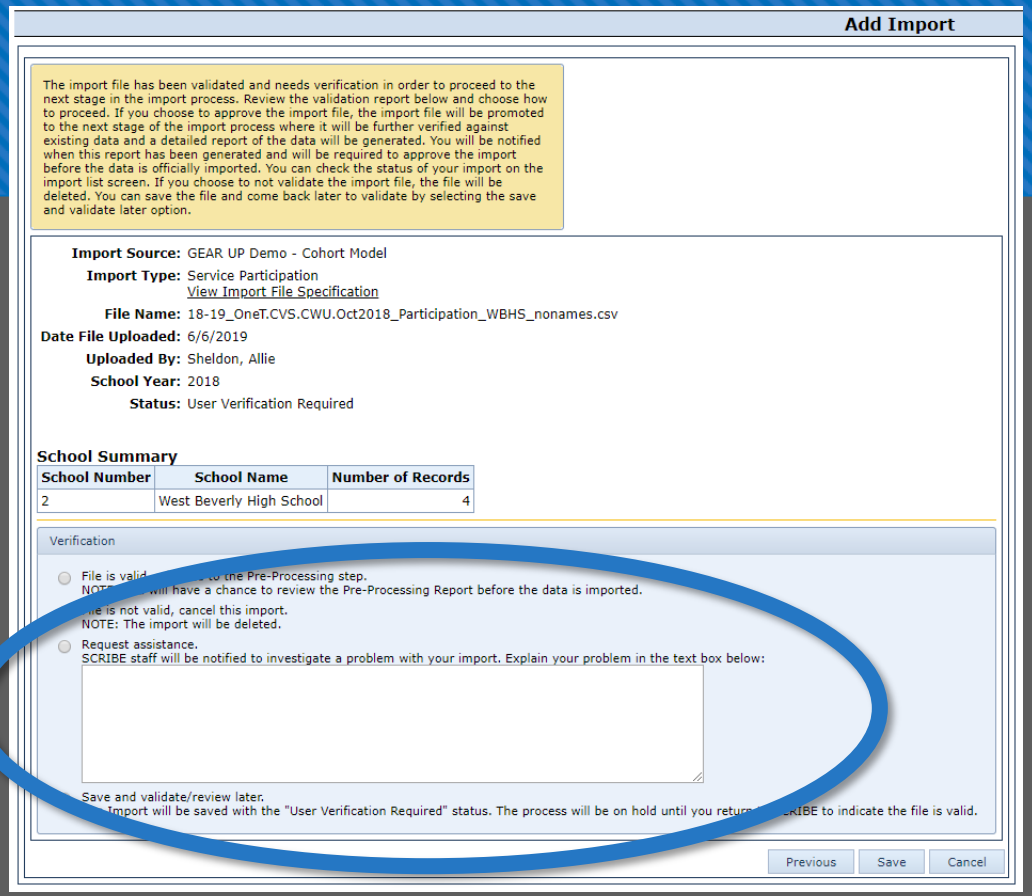
Any questions?


Add Import
The import file has been validated and needs verification in order to proceed to the next stage in the import process. Review the validation report below and choose how to proceed. If you choose to approve the import file, the import file will be promoted to the next stage of the import process where it will be further verified against existing data and a detailed report of the data will be generated. You will be notified when this report has been generated and will be required to approve the import before the data is officially imported. You can check the status of your import on the import list screen. If you choose to not validate the import file, the file will be deleted. You can save the file and come back later to validate by selecting the save and validate later option.
Import Source: GEAR UP Demo - Cohort Model
Import Type: Service Participation
View Import File Specification
File Name: 18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.csv
Date File Uploaded: 6/6/2019
Uploaded By: Sheldon, Allie
School Year: 2018
Status: User Verification Required
School Summary
School Number
School Name
Number of Records
2
West Beverly High School
4
Verification
File is valid, advance to the Pre-Processing step.
NOTE: You will have a chance to review the Pre-Processing Report before the data is imported.
File is not valid, cancel this import.
NOTE: The import will be deleted.
Request assistance.
SCRIBE staff will be notified to investigate a problem with your import. Explain your problem in the text box below:
Save and validate/review later.
The Import will be saved with the "User Verification Required" status. The process will be on hold until you return to SCRIBE to indicate the file is valid.
Previous
Save
Cancel


Import List
Download Original File
Import Config
Import 31662 - 2018 - Service Participation
18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.xlsx
File Format
Data Validation
Data Summary
Import Results
Service Participation
No File Format issues found.
5 of 5 required fields 3 of 3 optional fields
Field
Status
Description
PersonId
Service identifier
Person identifier
PersonTypeId
Person Type identifier
SchoolNumber
School identifier
DateOfParticipation
Date person participated in service (ex: mm/dd/yyyy)
TimeOfParticipation
Time of day person participated in service (ex: hh:mmAM)
HoursOfParticipation
Hours of participation
MinutesOfParticipation
Minutes of participation


Add Import
The import file has been validated and needs verification in order to proceed to the next stage in the import process. Review the validation report below and choose how to proceed. If you choose to approve the import file, the import file will be promoted to the next stage of the import process where it will be further verified against existing data and a detailed report of the data will be generated. You will be notified when this report has been generated and will be required to approve the import before the data is officially imported. You can check the status of your import on the import list screen. If you choose to not validate the import file, the file will be deleted. You can save the file and come back later to validate by selecting the save and validate later option.
Import Source: GEAR UP Demo - Cohort Model
Import Type: Service Participation
View Import File Specification
File Name: 18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.csv
Date File Uploaded: 6/6/2019
Uploaded By: Sheldon, Allie
School Year: 2018
Status: User Verification Required
School Summary
School Number
School Name
Number of Records
2
West Beverly High School
4
Verification
File is valid, advance to the Pre-Processing step.
NOTE: You will have a chance to review the Pre-Processing Report before the data is imported.
File is not valid, cancel this import.
NOTE: The import will be deleted.
Request assistance.
SCRIBE staff will be notified to investigate a problem with your import. Explain your problem in the text box below:
Save and validate/review later.
The Import will be saved with the "User Verification Required" status. The process will be on hold until you return to SCRIBE to indicate the file is valid.
Previous
Save
Cancel


Import List
Download Original File
Import Config
Import 31662 - 2018 - Service Participation
18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.xlsx
File Format
Data Validation
Data Summary
Import Results
GEAR UP Demo - Cohort Model - Service Participation
No File Format issues found.
5 of 5 required fields 3 of 3 optional fields
Field
Status
Description
ExternalServiceId
Service identifier
PersonId
Person identifier
PersonTypeId
Person Type identifier
SchoolNumber
School identifier
DateOfParticipation
Date person participated in service (ex: mm/dd/yyyy)
TimeOfParticipation
Time of day person participated in service (ex: hh:mmAM)
HoursOfParticipation
Hours of participation
MinutesOfParticipation
Minutes of participation


Add Import
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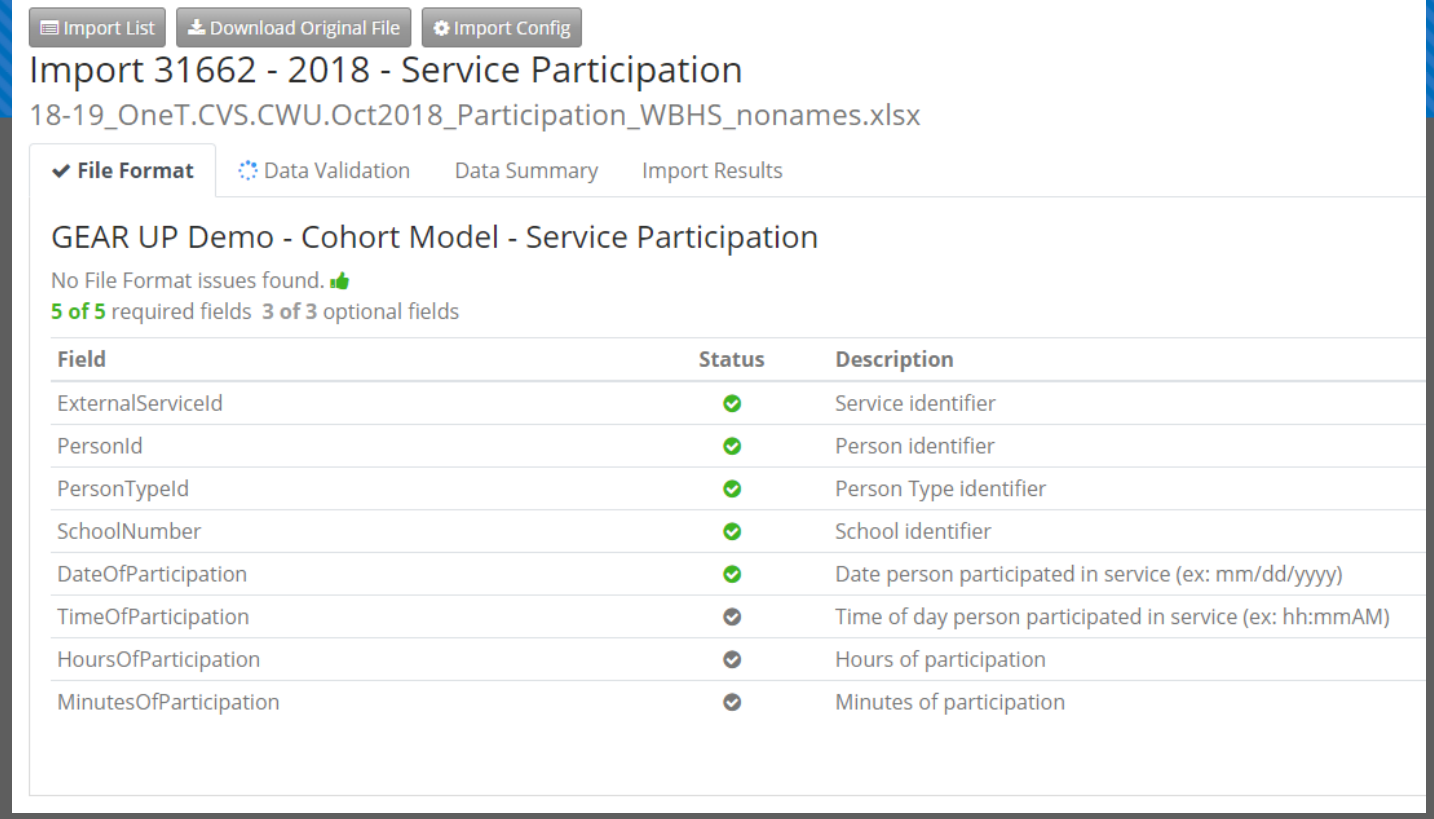
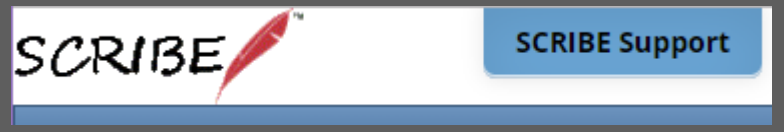
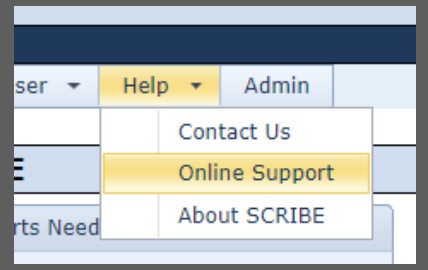
Import Source: GEAR UP Demo - Cohort Model
Import Type: Service Participation
View Import File Specification
File Name: 18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.csv
Date File Uploaded: 6/6/2019
Uploaded By: Sheldon, Allie
School Year: 2018
Status: User Verification Required
School Summary
School Number
School Name
Number of Records
2
West Beverly High School
4
Verification
File is valid
NOTE: The import will be deleted.
Request assistance.
SCRIBE staff will be notified to investigate a problem with your import. Explain your problem in the text box below:
Save and validate/review later.
Previous
Save
Cancel


Import List
Download Original File
Import Config
Import 31662 - 2018 - Service Participation
18-19_OneT.CVS.CWU.Oct2018_Participation_WBHS_nonames.xlsx
File Format
Data Validation
Data Summary
Import Results
GEAR UP Demo - Cohort Model - Service Participation
No File Format issues found.
5 of 5 required fields 3 of 3 optional fields
Field
Status
Description
ExternalServiceId
Service identifier
PersonId
Person identifier
PersonTypeId
Person Type identifier
SchoolNumber
School identifier
DateOfParticipation
Date person participated in service (ex: mm/dd/yyyy)
TimeOfParticipation
Time of day person participated in service (ex: hh:mmAM)
HoursOfParticipation
Hours of participation
MinutesOfParticipation
Minutes of participation


SCRIBE
SCRIBE Support


Help
Admin
Contact Us
Online Support
About SCRIBE

Import List

The following are import files that have been uploaded and their current status. Click the search link to filter the list of uploaded imports. Click the New Import button to upload a new import file.

Search

New Import

	Import Source	Import Type	School Year	Date Uploaded	Uploaded By	Import Status	Filename	Date Processed
View	GEAR UP Demo - Cohort Model	Student Enrollment	2018	6/1/2019 4:49 PM	Sheldon, Allie	Queued for Preprocessing	WestBeverlyHigh_AvengersEnrollment_4.27.19.csv	

Page 1 of 1 (1 items) 1 Page size: 20

Showing 1 to 4 of 4 entries

View	Uploaded	Filename	Status	Type	Uploader
View 31626	5/1/2019	WestBeverlyHigh_SpringEnrollment_5.1.19.csv	Queued for Data Validation	Student Enrollment	Allie Sheldon
View 31622	4/29/2019	CourseList_Import_statisticstest.csv	Import Complete	Course List	Allie Sheldon
View 31618	4/29/2019	WestBeverlyHigh_CourseList_4.29.19.csv	Import Complete	Course List	Allie Sheldon
View 31606	4/27/2019	WestBeverlyHigh_AvengersEnrollment_4.27.19.csv	Import Complete	Student Enrollment	Allie Sheldon

Show 100 entries

Previous 1 Next

Import List

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Search

New Import

	Import Source	Import Type	School Year	Date Uploaded	Uploaded By	Import Status	Filename	Date Processed	
View	GEAR UP Demo - Cohort Model	Student Enrollment	2018	6/1/2019 4:20 PM	Sheldon, Allie	User Review Required	WestBeverlyHigh_AvengersEnrollment_4.27.19.csv		
View	GEAR UP Demo - Cohort Model	Service Participation	2018	5/29/2019 4:38 PM	Hacker, Chris	Completed with No Issues	Rec.TMT.PeerTutoring.OCT2018.CAH.csv	5/29/2019	
View	GEAR UP Demo - Cohort Model	Service Participation	2018	5/29/2019 4:16 PM	Parra, Geronimo	Completed with No Issues	Rec.TMT.Peer.Oct2018.GJP.csv	5/29/2019	

+ Add Import

Import Configs

Imports

Last 3 Months 12 | Requiring Action 1 | My Imports 9 | All Imports 25

School Year: *** All Years *** Keyword:

Showing 1 to 9 of 9 entries

View	Uploaded	Filename	Status	Type	Uploader
View 31649	6/6/2019	18-19_CAP.Career.May2019.Participation.WBHS.xlsx	✱ Data Validation Review	ervice Participation	Allie Sheldon
View 31638	5/31/2019	18-19_StudentEnrollment_WestBeverlyHS_noissues.xl...	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31637	5/27/2019	EnrollmentDemographicsCarryoverTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31636	5/23/2019	EnrollmentPrimarySchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon
View 31634	5/23/2019	EnrollmentToSameSchoolTest.csv	✔ Import Complete	Student Enrollment	Allie Sheldon

Import List

The following are import files that have been uploaded and their current status. Click the search link to filter the list of uploaded imports. Click the New Import button to upload a new import file.

Search

New Import

	Import Source	Import Type	School Year	Date Uploaded	Uploaded By	Import Status	Filename	Date Processed	
View	GEAR UP Demo - Cohort Model	Student Enrollment	2018	6/1/2019 4:20 PM	Sheldon, Allie	User Review Required	WestBeverlyHigh_AvengersEnrollment_4.27.19.csv		
View	GEAR UP Demo - Cohort Model	Service Participation	2018	5/29/2019 4:38 PM	Hacker, Chris	Completed with No Issues	Rec.TMT.PeerTutoring.OCT2018.CAH.csv	5/29/2019	
View	GEAR UP Demo - Cohort Model	Service Participation	2018	5/29/2019 4:16 PM	Parra, Geronimo	Completed with No Issues	Rec.TMT.Peer.Oct2018.GJP.csv	5/29/2019	

+ Add Import

Import Configs

Imports

Last 3 Months 12 | Requiring Action 1 | My Imports 9 | All Imports 25

School Year: *** All Years *** Keyword:

Showing 1 to 9 of 9 entries

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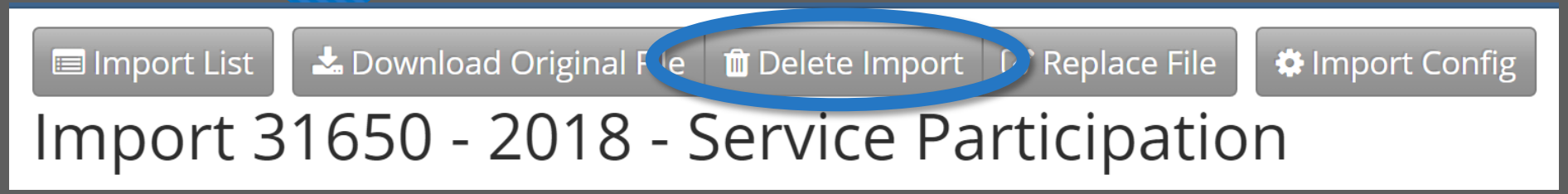
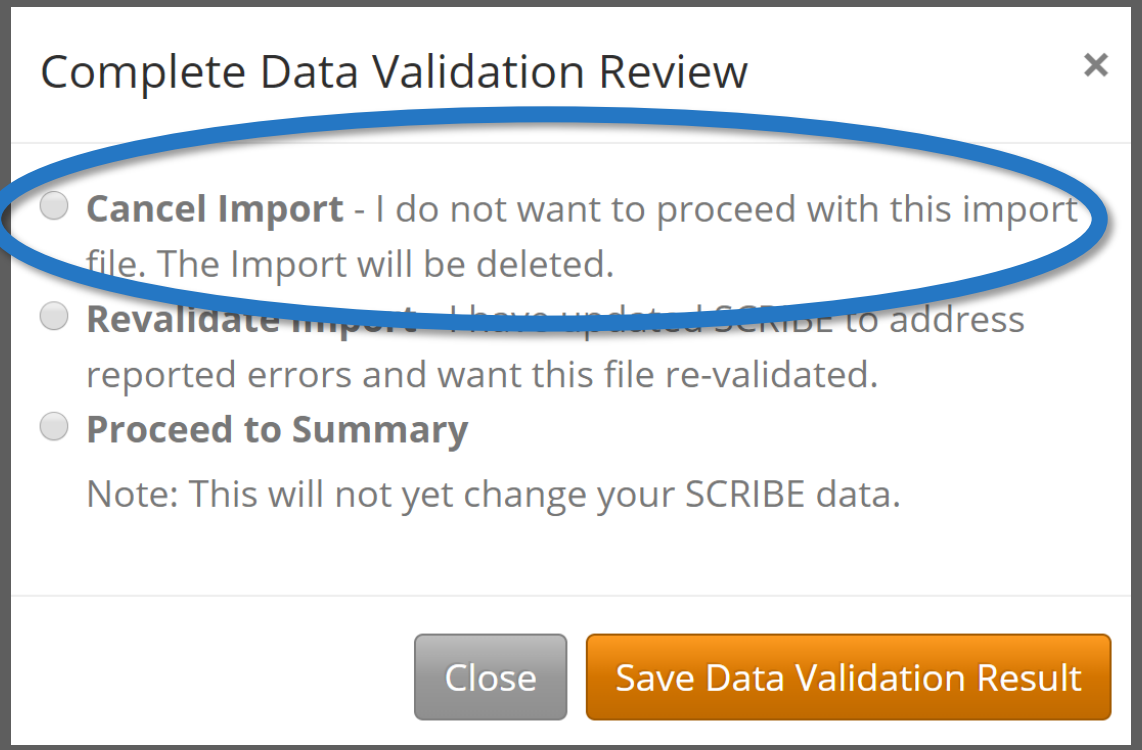
Deleting Imports





Any questions?

Participation

- Participation – hours a student / guardian / staff member spends on a service
- Tracked on the APR, useful for analysis of your programming, help you meet grant goals

Rules to Remember

- Student must be enrolled in school
- Date of participation must be in the past
  - Must fall within beginning and end date of recurring service
- Person type must match service
  - e.g., student-only service can only have student participation
- Duplicate import will overwrite existing participation data

Good News

- Import templates WILL NOT change
  - Same format – excel or csv
- Access the import module in SCRIBE with the same path

Let's get into SCRIBE!

- I'll demo a participation import
- Then I'll demo an import with some mistakes, show how SCRIBE will tell us there are issues and demo how to fix them

Thank you for attending!

- Next webinar: Tuesday, June 18
  10 am pacific / 1 pm eastern

  Standardized Test Scores &
  Attendance

New import module
July 1

- Allie Sheldon
  asheldon@xcalibur.com

Service

- Service – GEAR UP activity designed to meet the goals of the grant
  - e.g., college visit, mentoring, tutoring, financial aid counseling
- External Service ID
  - Naming conventions!

Thank you for attending!

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