

How to Create a Service via Import

Users can add a Service to SCRIBE manually and through an import. This PDF covers adding a service via import. See [How to Create A Service manually](#) article on the [SCRIBE Help Desk](#).

Create the File to Import

1. Determine the required and optional fields for a Service import. There are two ways:
 - a. **Look at the Import Template in your grant's Google Drive folder.** Every import template has a tab that has the field headings and a tab that describes each field, whether the field is required, the type of data needed for that field and where to find that data.

	A	B	C	D	E	F	G	H	I	
1	ProgramID	ServiceName	SchoolNumber	SchoolYea	StartDate	EndDate	ServiceType	ServiceTypeId	ServiceDeliveryCategoryId	Serv
2										
3										
4										
5										
6										
7										
8										
	<div> <div>SampleFileFormat</div> <div>FieldsDescribed</div> <div>Service Type Category ID</div> <div>Service Type ID</div> <div>+</div> </div>									

	A	B	C	D	E	F
1	Column	Field Name	Field Length	Required?	Comments	Values
2	A	ExternalServiceID	50	Required	This is a unique value that is the same as the service name using the GEAR UP Service Naming Conventions.	
3	B	ServiceName	50	Required	Service Name using GEAR UP Service Naming Conventions	
4	C	SchoolNumber	10	Required	Th Unique Identifier for the school	In SCRIBE click on Schools>View all Schools for School Numbers.
5	D	SchoolYear	4	Required	Year of first marking period	e.g., "2019" for 2019-2020 school year, "2020" for 2020-2021 school year
6	E	StartDate	10	Required	Start date for which the service is/was active	MM/DD/YYYY
7	F	EndDate	10	Required	Date for which the service began to be active	MM/DD/YYYY
8	G	ServiceTypeCategoryId		Required	Category for the service type of the service	Service Type Category IDs
9	H	ServiceTypeId		Required	Service type that the service fulfilled	In SCRIBE click on Reports > SCRIBE Configuration > Service Taxonomy
10	I	ServiceDeliveryCategoryId		Required	Category for the service delivery of the service	8: Virtual 9: Real (In-Person) 10: Telephonic
11	J	ServiceDeliveryId		Required	How the service was delivered	25: Virtual 26: Real (In-Person) 27: Telephonic
12	K	ServiceTimingCategoryId		Required		8
13	L	ServiceTimingId		Required		27

Note: Remember to download the Import Template from the Google folder and save it on your desktop before editing it. Click **File > Download > Microsoft excel**.

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- a. The second way to determine the required fields: In SCRIBE click **Tools > Import**. Click **Add Import**. Select the Import Type. Click the **View Specification** button.

SCRIBE SCRIBE Support

GEAR UP Demo_Current SCRIBE Import Back to SCRIBE

Import List

Add Import

Import Source 2

GEAR UP Demo - Cohort Model

Import Type 11

Service List

Import Config

GEAR UP Demo - Cohort Model - Service List

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

2019 - 2020

Data File

Choose import data file Browse

Cancel Upload Import File

The **Import Specification** list will appear in a popup box. The fields with a red asterisk are required, the other fields are optional.

Import Specification

GEAR UP Demo - Cohort Model - Service List

This import is used to add Services and assign them to Schools. This file should be uploaded and successfully imported before the Service Participation file.

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

Field	Status	Description
ExternalServiceId	*	Service identifier
ServiceName	*	Service name
SchoolNumber	*	School identifier
SchoolYear	*	School Year (ex: 2010 for the 2010-2011 school year)
StartDate	O	Start Date for which the Service is/was active (ex: mm/dd/yyyy)
EndDate	O	End Date for which the Service is/was active (ex: mm/dd/yyyy)
ServiceTypeCategoryId	*	Category for the Service Type
ServiceTypeId	*	Service Type - what function the Service fulfilled
ServiceTypeAdditionalInfo	O	Additional info if the Service Type requires it
ServiceDeliveryCategoryId	*	Category for the Service Delivery
ServiceDeliveryId	*	Service Delivery - how the Service was delivered
ServiceDeliveryAdditionalInfo	O	Additional info if the Service Delivery requires it
ServiceTimingCategoryId	*	Category for the Service Timing
ServiceTimingId	*	Service Timing - when the Service was delivered
ServiceTimingAdditionalInfo	O	Additional info if the Service Timing requires it

Note: SCRIBE will consider any fields included in the import that are not listed on the Import Specification list as “unknown” fields during the import process.

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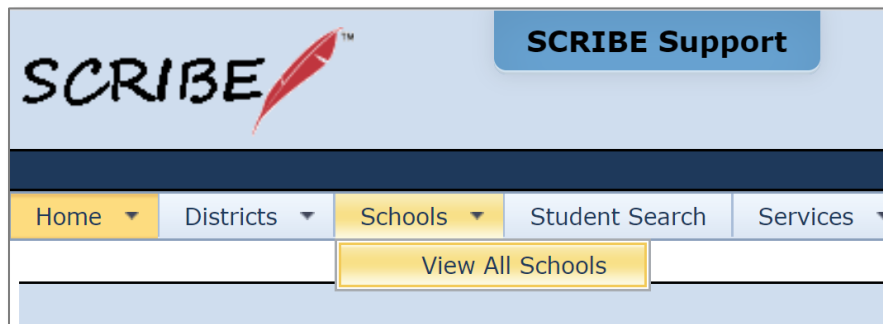
Fields

Fields are the different data categories you can include in the Service List import file (e.g., ServiceName, SchoolNumber, etc.) listed as separate columns in the spreadsheet. Some fields are **required**, meaning SCRIBE will not import your file without them. Some are **optional**, meaning it is up to you whether or not to include them in the import file.

TIP: Fields (columns) can be in the import file in any order. Field headings must be spelled correctly but capitalization does not matter (e.g., ServiceName = servicename = SERVICENAME = sErViCenAmE). There are no spaces in the field headings (e.g., SchoolYear is not the same as School Year).

Fields in a Service List Import (* indicates a required field)

- ExternalServiceID*: unique value using the SCRIBE Service Naming Conventions. The ExternalServiceID should be the same as the ServiceName.
- ServiceName*: unique name of the service using SCRIBE Service Naming Conventions. The ServiceName should be the same as the ExternalServiceID.
- SchoolNumber*: In SCRIBE click **Schools** > **View All Schools**.



The list of **School Numbers** are displayed in the School list. Copy the School Number of the school the students attend and paste it in the Service List Import spreadsheet in the SchoolNumber field.

SCRIBE Home > School List				
The following are all the available schools. Click the View link to see additional details for a school. Click the Search link to filter the list of schools.				
Search				
Drag a column header here to group by that column				
	School Number ▲	School Name	District Name	Grades
View	1	Bayside Middle School	Test District	7 - 8
View	2	West Beverly High School	Test District	9 - 12
View	3	William McKinley High School	Test District	9 - 12
View	4	DeGrassi Junior High	Test District	7 - 8
View	5	College	Test District	Post-Secondary -
5 Items				
Pages: 1 - 1 (5 items) 1 Page size: All				

How to Create a Service via Import

- d. SchoolYear*: first year in the two year school year (e.g., “2019” for the 2019-2020 school year, “2020” for the 2020-2021 school year)
- e. StartDate: day service is/will become active.
- f. EndDate: day service is/will become inactive.

Note: For one time services, the StartDate and EndDate will be the same date. For recurring services, the StartDate should be the first day of the month and the EndDate should be the last day of the month.

- g. ServiceTypeCategoryID*: code for the service type category. See the ServiceTypeCategoryID tab in the service list import template or the Service Taxonomy exported from SCRIBE (instructions below).
- h. ServiceTypeID*: code for the service type. See the Service Taxonomy exported from SCRIBE (instructions below).
- i. ServiceDeliveryCategoryID*: code for the service delivery category.
Codes: **8** for Virtual
 9 for Real (In-person)
 10 for Telephonic
- j. ServiceDeliveryID*: code for how the service was delivered.
Codes: **25** for Virtual
 26 for Real (In-person)
 27 for Telephonic
- k. ServiceTimingCategoryID*: enter **8** in this field for all rows.
- l. ServiceTimingID*: enter **27** in this field for all rows.
- m. PersonType1: indicated whether the service will be for students, parents or staff members.
Codes: **1** for student
 2 for parent/guardian/family
 3 for teacher/staff

Note: SCRIBE will allow a service to be assigned to up to three PersonTypes (fields are PersonType1, PersonType2, PersonType3). However, best practice recommends one PersonType per service. If a service caters to more than one person type (e.g., financial aid night for parents and students), create one service for students and another service for parents.

- n. IsSTEM: indicates whether the service is a STEM service. Enter **Yes** or **No**.
- o. IsELL: indicates whether the service is an ELL service. Enter **Yes** or **No**.

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p. ServiceProvider1:

Note: Up to three ServiceProviders may be added to the service list import (fields are ServiceProvider1, ServiceProvider2, ServiceProvider3).

q. ServiceNotes: use this field to indicate any relevant information that is not part of the service name or service summary (e.g., the destination of a field trip or if a service gets canceled).

r. ServiceTypeAdditionalInfo: Required for college visits. Enter the IPEDS number for the college visited. IPEDS can be found at nces.ed.gov/globallocator.

Note: To retrieve the ServiceTypeCategoryID, ServiceTypeID, ServiceTimingCategoryID, ServiceTimingID, ServiceDeliveryTypeID and ServiceDeliveryID, export the Service Taxonomy.

In SCRIBE click Reports > SCRIBE Configuration > **Service Taxonomy**.

Select the **Person Type(s)** to narrow the services listed on the Service Taxonomy (optional). Select **Report Format** to run the report as an Excel file or a PDF. Click **Generate Report**.

The screenshot shows the 'Service Taxonomy' page in the SCRIBE application. The page has a header with 'SCRIBE Home > Service Taxonomy'. Below the header is a yellow box labeled 'Service Taxonomy'. Underneath is a 'Report Filters' section with three filter groups: 'Program Type(s)' with checkboxes for 'GEAR UP' and 'General (Use for Programs not tracked in SCRIBE)'; 'Person Type(s)' with checkboxes for 'Student', 'Parent/Guardian', and 'Staff', and a 'Select All' option; and 'Report Format: *' with radio buttons for 'EXCEL' (selected) and 'PDF'. A 'Generate Report' button is located at the bottom right of the filter section.

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	A	B	C	D	E
1	Service Taxonomy				
2					
3	Service Types				
4	Tutoring/homework assistance (ID = 1)				
5	Service Type	Service Type Id	Person Types	Program Types	
6	T - Tutoring	185	Student	GEAR UP	
7					
8	Support Services (ID = 43)				
9	Service Type	Service Type Id	Person Types	Program Types	
10	SUP - Support Services	417	Student	GEAR UP	
11	EXT - Extracurricular Activity with definition or example - GPA recognition	481	Student	GEAR UP	
12	TST - Standardized Test Prep	606	Student	GEAR UP	
13					
14	Rigorous academic curricula (ID = 2)				
15	Service Type	Service Type Id	Person Types	Program Types	
16	STEM - STEM Time	663	Student	GEAR UP	
17					
18	Comprehensive mentoring (ID = 3)				
19	Service Type	Service Type Id	Person Types	Program Types	
20	MEN - Mentoring	527	Student	GEAR UP	

ServiceTypeCategoryID

ServiceTypeID

82		
83	Service Timings	
84	N/A (ID = 8)	
85		
86	Service Timing	Service Timing Id
87	N/A	27
88		
89	Service Deliveries	
90	Virtual (ID = 8)	
91		
92	Service Delivery	Service Delivery Id
93	Virtual service delivery method	25
94		
95	Real (Not Virtual) (ID = 9)	
96	Service Delivery	Service Delivery Id
97	Real service delivery method	26
98		
99	Telephonic (ID = 10)	
100	Service Delivery	Service Delivery Id
101	Telephonic service delivery method	27

ServiceTimingCategoryID

ServiceTimingID

ServiceDerliveryCategoryID

ServiceDeliveryID

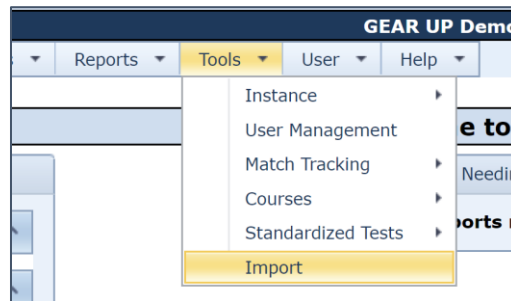
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Sample Service List Import File

	A	B	C	D	E	F	G	H
1	ExternalServiceID	ServiceName	SchoolNumber	SchoolYear	StartDate	EndDate	ServiceDeliveryCategoryId	ServiceDeliveryId
2	OneT.CSS.UCF.Apr2019.WBHS	OneT.CSS.UCF.Apr2019.WBHS	2	2019	4/5/2019	4/5/2019	8	25
3	OneT.FAC.FAFSAworkshopparents.Mar2019.WBHS	OneT.FAC.FAFSAworkshopparents.Mar2019.WBHS	2	2019	3/15/2019	3/15/2019	8	25
4	Rec.MEN.peer.Apr2019.WBHS	Rec.MEN.peer.Apr2019.WBHS	2	2019	4/1/2020	4/30/2020	8	25
5	Rec.SWS.FridayParentworkshop.May2019.WBHS	Rec.SWS.FridayParentworkshop.May2019.WBHS	2	2019	5/1/2019	5/31/2019	8	25
6	Rec.TMT.AlgebraZoomDropin.Mar2020.WBHS	Rec.TMT.AlgebraZoomDropin.Mar2020.WBHS	2	2019	3/1/2020	3/30/2020	8	25
7	Rec.TMT.AlgebraZoomDropin.Apr2020.WBHS	Rec.TMT.AlgebraZoomDropin.Apr2020.WBHS	2	2019	4/1/2020	4/30/2020	8	25
8	Rec.TMT.AlgebraZoomDropin.May2020.WBHS	Rec.TMT.AlgebraZoomDropin.May2020.WBHS	2	2019	5/1/2020	5/30/2020	8	25

Import Course List file

1. Save the Service List import file following best practice naming conventions: include the school year, type of import, other necessary details like month, quarter or semester, school/district name or abbreviation (e.g., 19-20_ServiceList_January_WBHS).
2. In SCRIBE, click **Tools > Import**.



3. Click **Add Import**.



4. Select the **Import Type: Service List**.

How to Create a Service via Import

Add Import

Import Source 2

GEAR UP Demo - Cohort Model

Import Type 10

Attendance and Disciplinary Actions

Course List

Service List

Service Participation

5. Make sure the **School Year** is correct. Click **Browse** to select the import file from your computer. Click **Upload Import File**. Follow the import process.

GEAR UP Demo_Current SCRIBE Import ← Back to SCRIBE

Import List

Add Import

Import Source 2

GEAR UP Demo - Cohort Model

Import Type 11

Service List

Import Config

GEAR UP Demo - Cohort Model - Service List

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

2019 - 2020

Data File

Choose import data file Browse

Cancel Upload Import File

Note: You must add participation to the services you have just created. See [How to Add Participation via Import](#) and [How to Add Participation Manually](#) for instructions.

Additional Resources:

[How to Import Data PDF](#) and [webinars](#)
[Troubleshooting Importing PDF](#) and [video](#)
[How to Add Services Manually](#)

Log into the [SCRIBE Help Desk](#) using your SCRIBE log in.