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.

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

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

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.
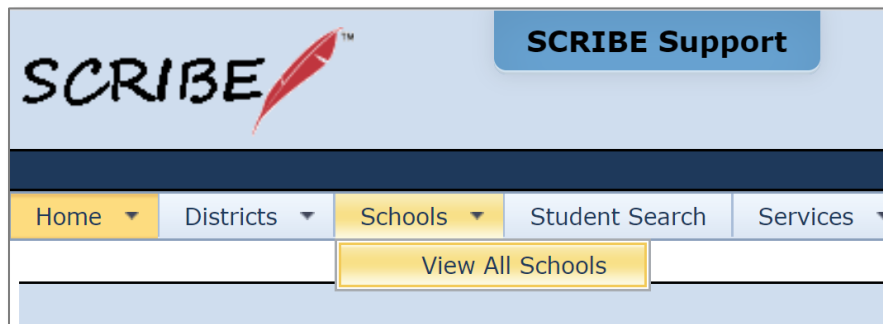
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Fields

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)
   a. ExternalServiceID*: unique value using the SCRIBE Service Naming Conventions. The ExternalServiceID should be the same as the ServiceName.

   b. ServiceName*: unique name of the service using SCRIBE Service Naming Conventions. The ServiceName should be the same as the ExternalServiceID.

   c. 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.

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d. <u>SchoolYear</u>*: 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. <u>StartDate</u>: day service is/will become active.

f. <u>EndDate</u>: 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. <u>ServiceTypeCategoryID</u>*: 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. <u>ServiceTypeID</u>*: code for the service type. See the Service Taxonomy exported from SCRIBE (instructions below).

i. <u>ServiceDeliveryCategoryID</u>*: code for the service delivery category.
    Codes: **8** for Virtual
               9 for Real (In-person)
               10 for Telephonic

j. <u>ServiceDeliveryID</u>*: code for how the service was delivered.
    Codes: **25** for Virtual
               26 for Real (In-person)
               27 for Telephonic

k. <u>ServiceTimingCategoryID</u>*: enter **8** in this field for all rows.

l. <u>ServiceTimingID</u>*: enter **27** in this field for all rows.

m. <u>PersonType1</u>: 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 on person type (e.g., financial aid night for parents and students), create one service for students and another service for parents.

n. <u>IsSTEM</u>: indicates whether the service is a STEM service. Enter **Yes** or **No**.

o. <u>IsELL</u>: 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**.

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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

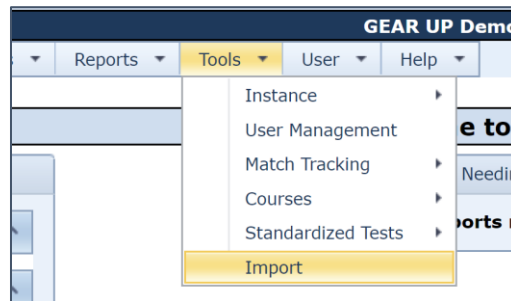ServiceTimingID

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	ServiceDeliveryI
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.

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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.

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.