

## How to Add Participation via Import

Users can add Service Participation manually and through an import. This PDF covers adding service participation via import. See [How to Add Participation Manually](#) on the [SCRIBE Help Desk](#).

Before participation can be added for a service, the service must exist in SCRIBE. See [How to Create a Service Manually](#) and [How to Create a Service via Import](#) for more information on creating services.

### Create the File to Import

1. Determine the required and optional fields for a Service Participation 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         | J        |
|---|-------------------|----------|--------------|--------------|---------------------|---------------------|----------------------|------------------------|-----------|----------|
| 1 | ExternalServiceID | PersonID | PersonTypeID | SchoolNumber | DateOfParticipation | TimeOfParticipation | HoursOfParticipation | MinutesOfParticipation | FirstName | LastName |
| 2 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 3 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 4 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 5 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 6 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 7 |                   |          |              |              |                     |                     |                      |                        |           |          |
| 8 |                   |          |              |              |                     |                     |                      |                        |           |          |

|    | A                      | B  | C   | D  |
|----|------------------------|--|---|--|
| 1  | <b>Field Name</b>      | <b>Required</b>  | <b>Values</b>   | <b>Comments</b>  |
| 2  | ExternalID             | Required   |   | Service identifier   |
| 3  | PersonID               | Required   | numeric   | This is the SSID for students. For parents, use the SSID, but change the PersonTypeID field to 2. This tells SCRIBE that parent participation is being imported. |
| 4  | PersonType             | Required   | 1 = Student, 2 = Parent, 3 = Teacher                          | This tells the import that the person is a student, parent, or teacher   |
| 5  | SchoolNumber           | Required   | In SCRIBE, Schools > View All Schools to view School Numbers. | The Unique Identifier for the school   |
| 6  | DateOfParticipation    | Required   | mm/dd/yyyy  | Date when the person participated in service   |
| 7  | TimeOfParticipation    |  | eg. 4:00 PM, 11:00 AM   | Time of the event if tracked at a time level   |
| 8  | HoursOfParticipation   | Required   |   | Use either minutes or hours  |
| 9  | MinutesOfParticipation | Required   |   | Use either minutes or hours  |
| 10 | FirstName              | NOT IMPORTED - Used for informational purposes only to easy verifying the file for the user. |   |  |
| 11 | LastName               | NOT IMPORTED - Used for informational purposes only to easy verifying the file for the user. |   |  |
| 12 |                        |  |   |  |

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**.

## How to Add Participation via Import

- b. 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

GEAR UP Demo\_Current SCRIBE Import

Import List

Add Import

Import Source 2

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

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 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  
O = Optional - field should only be in your file if you are providing values  
O = Set - at least one of the fields in a set must be in your file

| 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                 | O      | Time of day person participated in service (ex: hh:mmAM) |
| HoursOfParticipation <sup>A</sup>   | O      | Hours of participation                                   |
| MinutesOfParticipation <sup>A</sup> | O      | Minutes of participation                                 |

<sup>A</sup> - At least one of the following fields must be in the file: HoursOfParticipation, MinutesOfParticipation

Close

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. See the [Importing Data folder](#) and [Troubleshooting Imports](#) tutorial for more info.



## How to Add Participation via Import

**SCRIBE Home > Service List > Service Details**

★ **Service Name:** Rec.MEN.peer.Dec2019.WBHS **Start Date:** 12/1/2019 **End Date:**

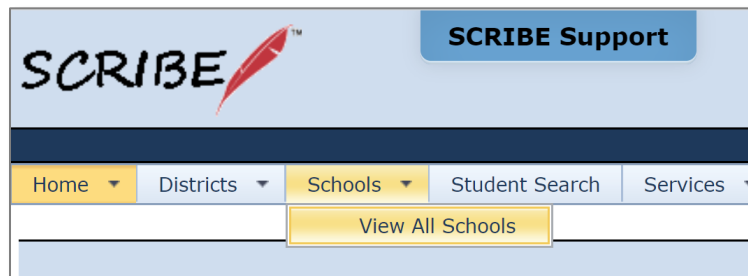
Service Details Participation Service Summary Attachments

This tab shows the detail information for the service.  
Click the Edit button to edit the service details.

**School(s):** West Beverly High School  
**School Year:** 2019 - 2020  
**Service Name:** Rec.MEN.peer.Dec2019.WBHS  
**Service Id:** 202230  
**External Id:** Rec.MEN.peer.Dec2019.WBHS  
**Start Date:** 12/1/2019  
**End Date:** 12/31/2019  
**Service Provider(s):**  
**Service Summary:** Default Activity Summary  
**Is STEM?** No

b. StudentID\*: unique identifier for each student used in SCRIBE.

In SCRIBE, click **Schools > View All Schools**.



Click **View** next to the school the students attend.

**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 - Fresh |

5 Items Pages: 1 - 1 (5 items) 1 Page size: All

Under the **Students Tab**, the students enrolled at the school will be displayed. Copy the student's Student ID and paste it in the StudentID column in the Service Participation spreadsheet.

## How to Add Participation via Import

**SCRIBE Home > School List > School Details**

★ **School Number:** 2    **School Name:** West Beverly High School

School Record   School Year Details   Staff   **Students**   Courses   Services   Student Groups   Attachments

The following are the students enrolled at this school.  
Click the add button to enroll a student at the school.

● **Search** Add

Drag a column header here to group by that column

|      | Student ID | School-Student Id | First Name | Middle Name | Last Name | Birthdate | School                   | Grade |
|------|------------|-------------------|------------|-------------|-----------|-----------|--------------------------|-------|
| View | 108642     |                   | Steve      |             | Rogers    | 7/4/2000  | West Beverly High School | 9     |
| View | 108643     |                   | Peggy      |             | Carter    | 4/9/2001  | West Beverly High School | 10    |
| View | 108644     |                   | James      | Bucky       | Barnes    | 3/10/2002 | West Beverly High School | 11    |
| View | 123456     |                   | Carol      | Susan Jane  | Danvers   | 10/4/2000 | West Beverly High School | 12    |
| View | 123457     |                   | Captain    |             | Marvel    | 10/5/2003 | West Beverly High School | 9     |

c. PersonTypeID\*: indicates what group of people participated in the service.

Codes: **1** for students


**2** for parents/guardians

**3** for staff

Note: Best practice recommends assigning 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/guardians.

d. SchoolNumber\*: unique identifier for each school used in SCRIBE.

In SCRIBE click **Schools > View All Schools**.

**SCRIBE**  **SCRIBE Support**

Home ▾   Districts ▾   **Schools ▾**   Student Search   Services ▾

**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 Student Participation Import spreadsheet under the SchoolNumber field.

## How to Add Participation via Import

**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           |
|----------------------|---------------|------------------------------|---------------|------------------|
| <a href="#">View</a> | 1             | Bayside Middle School        | Test District | 7 - 8            |
| <a href="#">View</a> | 2             | West Beverly High School     | Test District | 9 - 12           |
| <a href="#">View</a> | 3             | William McKinley High School | Test District | 9 - 12           |
| <a href="#">View</a> | 4             | DeGrassi Junior High         | Test District | 7 - 8            |
| <a href="#">View</a> | 5             | College                      | Test District | Post-Secondary - |

5 Items      Pages: 1 - 1 (5 items)      Page size: All

- e. DateofParticipation\*: the date the students/parents/staff participated.

Note: You can enter multiple different dates in the same Participation import, if applicable. For recurring services, it may be useful to include multiple dates of participation for the same service in the same import file. Be sure to only include students who actually participated on each date.

- f. TimeofParticipation: the time the participation occurred. Military and non-military time are both acceptable (e.g., 1:00 and 13:00)
- g. HoursofParticipation or MinutesofParticipation: time each student/parent/staff spent at the service.

One of the fields\* must be in the file. If one field is included, the other field should **NOT** be included (e.g., if the HoursofParticipation field is included, do not include the MinutesofParticipation field).

Note: 1.5 in the HoursofParticipation field means the same as 90 in the MinutesofParticipation field.

- h. FirstName: student first name. This field is optional and for ease of reviewing the participation file only. During the import process, SCRIBE will flag this field as unknown which means it will not import data in this field. It will not interfere with the import process.
- i. LastName: student last name. This field is optional and for ease of reviewing the participation file only. During the import process, SCRIBE will flag this field as unknown which means it will not import data in this field. It will not interfere with the import process.

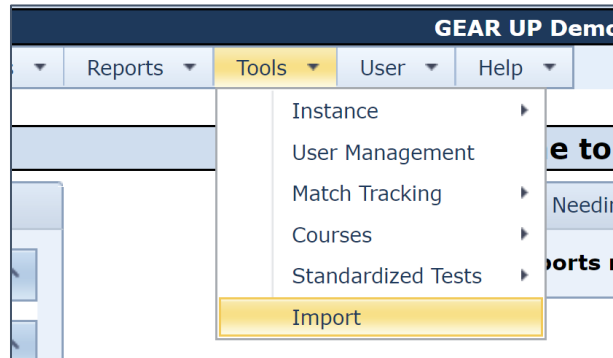
## How to Add Participation via Import

### Sample Participation List Import File

|   | A                                   | B         | C            | D             | E                    | F                    | G                     | H                       | I         | J        |
|---|-------------------------------------|-----------|--------------|---------------|----------------------|----------------------|-----------------------|-------------------------|-----------|----------|
| 1 | ExternalID                          | StudentID | PersonTypeID | School Number | DateOf Participation | TimeOf Participation | HoursOf Participation | MinutesOf Participation | FirstName | LastName |
| 2 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 432124    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | Bruce     | Banner   |
| 3 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 108644    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | James     | Barnes   |
| 4 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 789101    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | Luke      | Cage     |
| 5 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 108643    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | Peggy     | Carter   |
| 6 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 789789    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | Mike      | Colter   |
| 7 | OneT.FAC.FAFSAworkshop.Aug2019.WBHS | 123456    | 1            | 2             | 8/2/2019             |                      | 2.5                   |                         | Carol     | Danvers  |

### Import Participation file

1. Save the Participation import file following best practice naming conventions: include the school year, type of import, other necessary details like service details, school/district name or abbreviation (e.g., 19-20\_participation\_FAFSA\_Aug2019\_WBHS).
2. In SCRIBE, click **Tools > Import**.



3. Click **Add Import**.



## How to Add Participation via Import

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

The screenshot shows a modal window titled "Add Import". It has two main sections. The first section, "Import Source", has a dropdown menu with "GEAR UP Demo - Cohort Model" selected. The second section, "Import Type", has a dropdown menu with "Service Participation" selected. The "Import Type" dropdown is open, showing a list of options: "Attendance and Disciplinary Actions", "College Enrollment - Outreach Format", "Course List", "Service List", and "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.

See the tutorials in the [Importing Data folder](#), [Troubleshooting Imports](#) and the [Import webinars from June, 2020](#) on the SCRIBE Help Desk for more info on importing files in SCRIBE.

The screenshot shows the "Add Import" dialog box in the SCRIBE application. The "Import Source" dropdown is set to "GEAR UP Demo - Cohort Model". The "Import Type" dropdown is set to "Service Participation". The "Import Config" dropdown is set to "GEAR UP Demo - Cohort Model - Service Participation". The "School Year" dropdown is set to "2019 - 2020". The "Data File" section has a text input field with the placeholder "Choose import data file" and a "Browse" button. There is a "View Specification" button with an information icon. At the bottom right, there are "Cancel" and "Upload Import File" buttons. The top of the dialog shows "GEAR UP Demo\_Current" and "SCRIBE Import" with a "Back to SCRIBE" link.

## How to Add Participation via Import

### **Additional Resources:**

[How to Create a Service Manually](#)

[How to Create a Service via Import](#)

[How to Add Participation Manually](#)

[How to Add Participation Manually using a Student Group](#)

[How to Run a Student Participation Export](#)

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