

Data Import Process

Updated in November, 2021

Edclub's data import process describes the four CSV file formats that districts can use to import their data rosters into edclub. These files are:

- **school.csv**: a list of all schools
- **instructor.csv**: a list of all instructors
- **class.csv**: a list of all classes
- **student.csv**: a list of all students as well as their class enrollment information

While the file names are not important, the column headers are used by the system to identify each file type and process them in the correct order. The basic behavior of the system is to go through each row in the file, and follow the "action" column which may instruct it to add, update, or delete a record. If you leave the "action" column blank, the system will try to update the information first and add it if no information is found to be updated. The system does not assume you are importing your entire roster every time, and excluding one or more of your files does not result in any automatic deletion of your records. For example, if you already have 1,000 students in the program, and you upload a student.csv file with only 900 students, the system does not remove the remaining 100 students. To remove students, you must use the action "delete" under the "action" column.

The system also attempts to avoid making duplicate records by inspecting the new data against the existing data and making certain assumptions. For instance, if you are trying to upload a list of your instructors but already have existing instructors, the system will try to see if an instructor with the same email exists prior to adding and sending an email to that instructor.

File Format

The following includes a definition for each of the file types. Please upload your files in the specified order (schools, instructors, classes, students). If you only have one school, you can skip the first step.

Step 1: Upload schools with a school.csv file

This file allows you to import all of your schools using a single CSV file.

Use this link to download a sample CSV file. Here are the columns that are accepted by our internal processor.

Field title	Description
school-id	This is your internal primary key for the school. (Required) <ul style="list-style-type: none">• The value can be a number or text• Must be unique in your account• The column must appear as the first column• The column header must appear as “school-id”
name	The name of the school. (Required)
address	The school address. (Optional)
action	The action to take. (Optional) <ul style="list-style-type: none">• Two possible values for this field are: “update”, and “delete”• Value “update” will update the record if it already exists, or will add it if doesn’t.• Value “delete” will delete the school from our records.

Step 2: Upload teachers with an instructor.csv file

This file allows you to import all of your instructors using a single CSV file.

Use this link to download a sample CSV file. Here are the columns that are accepted by our internal processor.

Field title	Description
instructor-id	<p>This is your primary key for an instructor. (Required)</p> <ul style="list-style-type: none">• The value can be a number or text.• Must be unique per instructor in the entire district. You may not reuse the same instructor-id in a different school.• This column must be the first column on the left side of the spreadsheet.• The column header must appear as “instructor-id”
school-id	<p>This is the primary key for the school that the instructor resides in. (Required)</p> <ul style="list-style-type: none">• This value is required only if you have more than one school.• A school with this ID must exist in the system. If you have a multi-school account and no such school is identified, the system will default the instructor into the school with the district name.• The column header must appear as “school-id”.
first name	The first name of the instructor. (Required)
last name	The last name of the instructor. (Optional)
email	The email address of the instructor. (Required)
phone	The phone numbers of the instructor. (Optional)
password	<p>The instructor’s password. (Optional)</p> <ul style="list-style-type: none">• Passwords must be at least 8 characters long.
send-invite	<p>If set to “true”, the system will send an invite for the users who are being added for the first time to set up their password and log in. If the user already exists, the system will not send them an email. This flag is by default set to “false”. (Optional)</p>
action	<p>The action to take. (Optional)</p> <ul style="list-style-type: none">• Two possible values for this field are: “update”, and “delete”• Value “update” will update the record if it already exists, or will add it if doesn’t.• Value “delete” will delete the school from our records.

Step 3: Upload classes with a classes.csv file

This file allows you to import all of your classes using a single CSV file.

Use this link to download a sample CSV file. Here are the columns that are accepted by our internal processor.

Field title	Description
class-id	<p>This is your primary key for this class. (Required)</p> <ul style="list-style-type: none">• The value can be a number or text.• Must be unique per class in the district. You may not reuse the same class-id in a different school.• This column must be the first column on the left of the spreadsheet.• The column header must appear as “class-id”.
instructor-id	<p>This is the primary key for the instructor that is teaching the class. (Required)</p> <ul style="list-style-type: none">• An instructor with this ID must exist in the system.• The column header must appear as “instructor-id”.• You may not have more than one instructor per class in a single row. To assign multiple teachers to the same class, you must duplicate this row with the other instructor-id. This will not add the class twice, as long as you use the same class-id.
school-id	<p>This is the primary key for the school where the class is taught. (Required)</p> <ul style="list-style-type: none">• This value is required only if you have more than one school.• A school with this ID must exist in the system. If no such school is identified, the system will place the class in the district.• The column header must appear as “school-id”.
name	<p>The class name. (Required)</p>
description	<p>Description of the class. (Optional)</p>
grade	<p>The grade for the class. (Optional)</p> <ul style="list-style-type: none">• Use “K” to identify Kindergarten.• Use a number between 1 - 12 to identify 1st - 12th grade.
action	<p>The action to take. (Optional)</p> <ul style="list-style-type: none">• Two possible values for this field are: “update”, and “delete”• Value “update” will update the record if it already exists, or will add it if doesn't.• Value “delete” will delete the class from our records.

Step 4: Upload students with a students.csv file

This file allows you to import all of your students and enroll them in their classes using a single CSV file. Use this link to download a sample CSV file. Here are the columns that are accepted by our internal processor.

Field title	Description
student-id	<p>This is your primary key for this student (Required)</p> <ul style="list-style-type: none">• The value can be a number or text.• Must be unique per student in the entire district.• The column must appear as the first column on the left side of the spreadsheet.• The column header must appear as “student-id”.
class-id	<p>This is the primary key for the class that the student should be enrolled in. (Optional)</p> <ul style="list-style-type: none">• A class with this ID must exist in the system.• The column header must appear as “class-id”.• In order to enroll a student into more than one class, repeat this row with a different class-id. This won't create duplicate student entries as long as the student ID is the same in all rows for the different classes.
school-id	<p>This is the primary key for the school that the student attends. (Required)</p> <ul style="list-style-type: none">• This value is required only if you have more than one school.• A school with this ID must exist in the system. If no such school is identified, the system will assign the student to the district.• The column header must appear as “school-id”.
first name	<p>The student's first name. (Required)</p>
last name	<p>The student's last name. (Optional)</p>
username OR email	<p>The student's username or email. (Required)</p> <ul style="list-style-type: none">• Either a username or email address is required for each student. If the email address for the student is not provided, the username is required.

<p>password</p>	<p>The student's password. (Optional)</p> <ul style="list-style-type: none"> ● If you have an alternate login method (ie. Google), provide "random" as the password value for a random password to be automatically generated and set for the student. ● If the password is left blank, the student will be able to sign in with just a username (leaving the password field blank). ● No special format is required for student passwords.
<p>force-password-update</p>	<p>This function will update students' passwords. (Optional)</p> <ul style="list-style-type: none"> ● Possible values for this column are: 0 or 1 ● Value "1" is the default value. It will update students' passwords to the value provided in the "password" column. ● If the value is set to "0", the password column is automatically disregarded if the student already exists and has had a successful login attempt in the past 3 months. ● Only include this column if you really need it.
<p>grade</p>	<p>The grade for the class. (Optional)</p> <ul style="list-style-type: none"> ● Use "K" to identify Kindergarten. ● Use a number between 1-12 to identify 1st - 12th grade
<p>action</p>	<p>The action to take. (Optional)</p> <ul style="list-style-type: none"> ● Two possible values for this field are: "update", and "delete" ● Value "update" will update the record if it already exists, or will add it if it doesn't. ● Value "delete" will delete the student from our records.

Importing Files

There are two methods for importing your CSV files into edclub.

Method 1: The first method is to use our Data Import Tool located in your administration portal under Tools → Data Import Tool. Once there, you can individually upload and test your CSV files.

Method 2: The second method is to upload your files into your sFTP account. If you haven't set up your sFTP account yet, you may reach out to your edclub account representative or create a ticket in the support section of your portal. Once your sFTP account is set up, you may use automation tools to generate and upload these files to your account daily. Our sFTP processor will log in to your sFTP account every night and will process the files at around 3 AM EST. A result of the process will be emailed to you and a detailed log will be available in your sFTP directory. For further documentation on how to use your sFTP setup, please reach out to your edclub representative.