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Data Import/Export Guide

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Contents

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1   Introduction

This guide explains how to import and export data via the aimswebPlus Manage module.

♦ **Roster Imports** are used to create the account structure (Districts, Schools, and Classes) by importing teachers and students, updating student demographics, and rostering students into classes.

♦ **User Imports** are used to import all of the users for the account and all roles for a given user.

♦ **Roster, User, and Score Exports** may be saved for future use.You can update the exported Roster and User files and re-import the files to update your organizational data within the system.

Note: You may also manually add individual data for districts, schools, classes, students, and users. Please see the Online Help for instructions. You do not need an import file.

This guide contains the following information:

• Importing Data via Manage > Import explains how to use the wizard from within aimswebPlus to obtain the templates and import the data files. You will need an import file. For instructions, see Creating Import Files.

• Creating Import Files explains how to obtain the NCES identifiers and unique identifiers, how to enter data in the templates, changes that occur when the file is imported, cata that is inactivated if not in your file, and how to save the templates as text files. These files will then be ready to import.

• Exporting Data explains how to export roster, user, and score data. Roster and user export files can be updated and re-imported as needed.

2   Importing Data

This chapter explains how to import data using Manage > Import in aimswebPlus. For file instructions, see [Creating or Updating the Import File](#).

> **Notes**:
>
> Do not use Import for incremental changes, because it is processed as a complete replacement of data. Each import file should always be the current state.
>
> Import the Roster file prior to the User file if you are setting up your account for the first time or preparing for a new school year.
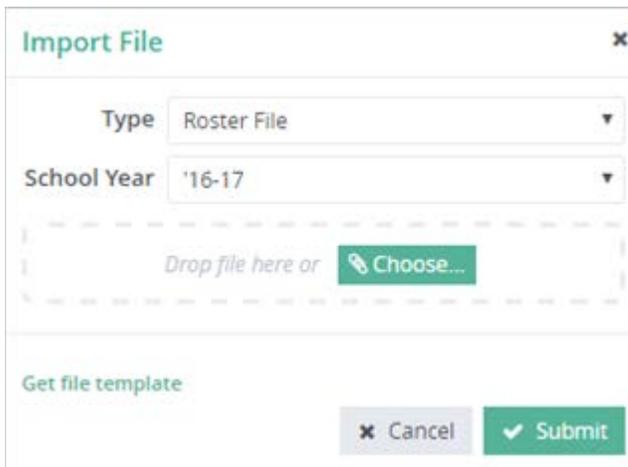
Roles

♦   An aimswebPlus role is required to obtain the templates.

♦   An aimswebPlus role is NOT required to create the files.

♦   The Account Manager role is required to import the files.

Import a Roster File

In aimswebPlus, click **Manage** and select **Import**. The Import File dialog box appears. The Roster File type is displayed by default.

If you have not yet created a file, click **Get file template** and see [Creating or Updating the Import File]().

 in this guide.

1. For **School Year**, click the drop-down to select. All options for the account are shown, including current year (default) and future subscriptions.

2. Drag your file to the *Drop file here* line or click **Choose** and select the file.

3. Click **Submit**.

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Import a User File

In aimswebPlus, click **Manage** and select **Import**. The Import File dialog box appears. Click the Type drop-down and select **User File**.

If you have not yet created a file, click **Get file template** and see Creating or Updating the Import File in this guide.

Note: The Roster import must be done first if you are using the import feature to set up your account for the first time or preparing for a new school year.
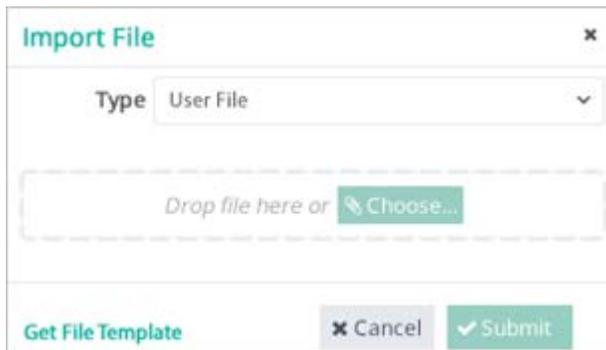
1. Drag your file to the *Drop file here* line or click **Choose** and select the file.

2. Click **Submit**.

View the Import Status

When you are notified that the import is complete, click **Manage > Notification History** and view the report in the Notification History box. A summary indicates whether the import was successful.

Import Status Report

You can view the new data in the associated views:

- ◆ Student Roster contains the Student Roster data.

- ◆ User Account Management contains the User data.

3   Creating or Updating the Import File

Before You Begin

- To prepare to create a new import file, first obtain the NCES identifiers and unique identifiers, and the Roster or User template.

- To update a file that you have previously exported using Manage > Export or created from another source (such as a school file), refer to this guide and the templates for the newest information and format requirements.

Obtain NCES Identifiers and Unique Identifiers

NCES and Unique identifiers (UIDs) allow the Import data to be added, marked as inactive, or updated accurately with each subsequent upload.

NCES Identifiers

aimswebPlus requires the entry and verification of the National Center for Education Statistics (NCES) school number and selection of a primary contact for each school and district in your account. To find the NCES number for a school, go to https://nces.ed.gov/globallocator/

- The NCES Identifier only affects accounts in the United States.

- An NCES Number is a unique identifier for each school within each state.

- NCES numbers must be entered and/or verified annually.

The 12-digit NCES number has three parts:

- The first 2 digits indicate the state using the FIPS code.

- The next 5 digits indicate the district.

- The last 5 digits indicate the school.

Unique Identifiers

Unique Identifiers (UIDs) are used to identify districts, schools, classes, teachers, and student groups.

- ♦ Student UIDs are located in the Student Information System; these UIDs follow the student through the school system.

- ♦ UIDs for districts, schools, classes, teachers, and student groups can be created or obtained the school system. UIDs are required for districts, schools (each must be unique within the district), class sections (each must be unique within the school for the school year), teachers (along with unique email address), and students (ID must be unique within the account).

- ♦ Import fails if UIDs are not provided in the **Roster** file.

- ♦ All UIDs are required for Roster import. For User import, only the User UID is required, and then depending on the role. For example, a District Manager would need a District UID; a School Manager would need both the District UID and the School UID.

Unique Identifier Examples

The following table provides an example and requirements for each UID type.

Unique ID Type	UID Examples	UID requirements	When UID is optional	When UID is required
District	A ab123 ABC2500# 123456	Size: 1 to 32 characters. May consist of any mix of letters, numbers, or symbols. The typical ID is numeric. The typical source is from an existing school system set of numbers.	Adding a district	Adding/importing schools
School				Adding/importing classes
Class				Adding/importing teachers
Teacher				Adding/importing students
Student	Named student ID from the student information system			Required for all student areas

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Obtain the Templates

Your file must be in the data format needed to import the data. You may use the sample templates provided within aimswebPlus.

♦   If you use the template, enter data on the Template tab, using the instructions on the Layout and Conditional Req tabs (and for the User template, the RoleCode tab).

♦   If you use a file that you have previously exported using Manage > Export or created from another source (such as a school file), refer to this guide and the templates for the newest information and format requirements.

To download the templates, use any of these locations:

- In aimswebPlus, click **Manage** and select **Import**. Click **New Import**, select the type of import to perform, and click **Get Template File**.
- In the aimswebPlus Help, in the Contents go to the Account/District/School Managers and select Import Templates and User Guide.
- In the aimswebPlus Help, see the **Manage > Import** topic.

Your browser controls how and where the file is downloaded. The template is a read-only Excel file. Save the file in any folder, and then copy it to enable editing your copy. It is useful to keep the original for reference.

♦   Alternately, your school may have a method for creating import files. Your files must be in the same format as our template.

♦   If this is not your initial import, you may export roster or user data, update the exported files as needed, and import the files.

Template Purposes

Template Purposes

Roster template	The Roster template is used to create the account structure (districts, schools, and classes) by importing teachers and students, updating student demographics, and rostering students into classes. **Note: Import the Roster first if you are setting up your account for the first time or preparing for a new school year.** Demographics are assigned to the student and will apply to all scores in the file. Changing a demographic value via Roster import will not retroactively update scores that already exist in your account and are not included in the file to be edited by the import.
User template	Use this template to add <u>new</u> users after setting up the account. This import will not update or edit information for existing users.

Font Color Meanings

The font colors indicate whether data is required, conditionally required, or optional.

Font Color Meanings

Red font	Required The information must be provided in your file.
Blue font	Conditionally Required. The information is needed for certain conditions only (see the Description column and Conditional Req Fields tab for details). The system checks to see if the item is entered when needed and records a message if missing. The column header is always required, even if none of the individual rows require data in that column.
Black font	**Optional**: Fields labeled **Not Required** do not require data. The column header is always required, even if none of the individual rows contain data in that column. If data is not supplied for some of these optional fields, you cannot report on them. **For example**: If you want to report TeacherPhone, you must supply that information. Optional data may be added later via the interface.

Template Tabs

The tabs specify the data columns and requirements for each type of import. There are three tabs in the Roster template, and four in the User template.

- The **Layout** and **Conditional Req Fields** tabs contain guidelines and instructions.
- The **Template** tab contains headers only. Enter your data in this tab. You need to be viewing this tab when you save the spreadsheet as a text file.
- The **UserRoles** tab is only in the User template. To assign a user role, enter the code that corresponds to the desired role.

Layout Tab

Templates are dated on the Layout tab with the date they were last updated. The template dates do not correspond with the application release dates. The templates are updated separately, so will seldom have the same dates. If you need to call support, it is helpful to have the template date available.

The Layout tab describes whether the data in a column is conditional, required, or not required, when the data is required, and the valid values for the data.

Layout Tab

	A	B	C	D	E
1	User Import File Template				
2	aimswebPlus 12/15/2016	Release 8.0			
3					
4	**Column Name**	**Req Rule**	**Uniqueness Rule**	**Valid Values** *(* denotes default)*	
5	DistrictUID	Conditional	Within Account	32 characters alphanumeric (no tabs, no spaces)	
6	SchoolUID	Conditional	Within District	32 characters alphanumeric (no tabs, no spaces)	
7	ClassUID	Conditional	Within School	32 characters alphanumeric (no tabs, no spaces)	
8	UserID	Required	Within Account	32 characters alphanumeric (no tabs, no spaces)	
9	Username	Required	Within Account	50 characters alphanumeric (no tabs or spaces; limited special characters)	
10	IsTeacher	Required		0 = No, 1 = Yes; allow User to be assigned as a teacher for class(es)	
11	RoleCode	Required		[see RoleCodes tab for list] A user can have one or multiple roles.	
12	FirstName	Required		30 characters alphanumeric (no tabs)	
13	MiddleName	Not Required		30 characters alphanumeric (no tabs)	

Column Name	Lists the columns in the order they appear on the Template tab. **If you create your own file without using the template, ensure that the Column names match the spelling and capitalization shown in the template, including no spaces.**
Req Rule	Data for the associated column is **Required**, **Conditionally Required** or **Not Required (ie, Optional).**

	Each requirement rule only applies to the data. The column headers are always required in the file.
Uniqueness Rule	If a rule is appropriate to the column, the rule shows where the data must be unique. For example, a ClassUID (unique identifier) is only required to be unique within a school while a DistrictUID must be unique across the entire account. **These rules are enforced within the import, and data that does not meet the conditions will result in a failed import file.**
Valid Values	This shows the acceptable values for each column. **The values in your file must match the values listed here. Any deviation will result in a failed import file or rejected row. For example, if the valid values are <blank>, 0 and 1, but any other text is entered, the import will not process.** **Note:** in most cases <blank> (a field left blank) means "do not change the existing value in the database for this record."
Notes and Code mapping	This shows any special rules about the column data or explanation for codes used. For example, in the Roster template, the demographics corresponding to each code display in this column.

Conditional Req Field Tab

The following figure is a shortened view of a sample tab.

Conditional Req Field Tab

	A	B
1	**Column**	**Condition**
2		
3	DistrictUID	Required if any District, School or Class role is being assigned
4	SchoolUID	Required if any School or Class role is being assigned
5	ClassUID	Required if any Class role is being assigned

Column Name	Identifies the columns on the Layout tab that are Conditionally Required.
Condition	Shows the required conditions and dependencies.

Role Codes Tab (User Template only)

The User Roles tab is specific to the **User Template** and lists all of the available roles within aimswebPlus. Enter the User Role exactly as it displays in the template.

Role Codes Tab

	A	B
1	**Valid Role Code**	Description (for informational purposes; use Code in the import file)
2	ACCOUNT_MANAGER	Has full rights to the entire aimsweb Account
3	DISTRICT_MANAGER	Has full rights to the specified District and its School(s) and Class(es)
4	SCHOOL_MANAGER	Has full rights to the specified School and its Class(es)
5	ACCOUNT_REPORTER	May access all views and reports in the entire aimsweb Account, but not allowed to edit students or settings
6	DISTRICT_REPORTER	May access all views and reports for the selected District and its School(s) and Class(es), but not allowed to edit students or settings
7	SCHOOL_REPORTER	May access all views and reports for the selected School and its Class(es), but not allowed to edit students or settings
8	CLASS_REPORTER	May access all views and reports for the selected Class, but not allowed to edit students or settings
9	CLASS_TEACHER	Can only be assigned if "IsTeacher" value is 1 (for Yes); has full rights to the specified Class and its student records; is shown as a Teacher for the specified Class

Layout / Template / Conditional Req Fields / **RoleCodes**

Valid Role Code column	Lists the role code to be used when you add users. The code is the role name in this exact format, for example: ACCOUNT_MANAGER.
Description column	Identifies the role permissions.

Template Tab

The Template tab contains the import data, and will be saved as the import file. When you are ready to save you must be on the Template tab.

Template Tab

A	B	C	D	E	F	G	H	I
SchoolYear	DistrictUID	DistrictName	DistrictAbbreviation	DistrictNCESID	SchoolUID	SchoolName	SchoolLevel	School Max Grade

Enter or Update File Data

- ♦ If you create or use a file from a non-Pearson source, ensure that your column headers match those in the Template tab. Check your data with the instructions on the other tabs.

- ♦ If you update an exported aimswebPlus file, the format will correctly match the Template tab and can be updated and used for importing. Check your updated content with the instructions on the other tabs.

To enter data in the template:

1. Open the template.

2. Type your data in the Template tab.

3. Refer to the remaining tabs for instructions and samples.

4. Read the important file information in this chapter.

File Guidelines

Item	Description
Templates	- Your column headers must match the template column names EXACTLY. - Do not omit any columns, even when the data in the column is optional or conditionally required. - Do not use macros or references to any external sheets or formulas. These may produce hidden characters in your exported .txt file. - Ensure there are no hidden columns in your file. - Ensure there are no extra or blank columns and/or rows.
Maximum file size	Maximum file size is one million records: - A record is considered to be a row of data, such as one student and his/her associated information. - When the maximum size is exceeded, a notification is sent to the Import Process Initiation Email Address with contact information for assistance. - You may reduce the file size and re-submit the file.
Optional fields	Blank *optional* fields in your file WILL NOT overwrite pre-existing completed fields.

Roster files	Roster imports are limited to Account Managers. Importing a roster assigns the Account Contact as the Primary Contact.
	Roster files must be done first if you are using the import feature to set up your account for the first time or preparing for a new school year. Use the Roster data file for all organizational and student data import.
	Important: See Entry and Exit Dates.
User files	User imports are limited to Account Managers.
	♦ Usernames must be unique within the account, even inactive usernames.
	♦ User files must contain all of the users for the account and all roles for a given user. Any missing users will be marked inactive.

EntryDate and ExitDate Fields in the Roster Template

It is strongly recommended that when you create a Roster file to import, always include the **EntryDate** and **ExitDate**. These dates become important for reflecting proper results, including local norms.

- You can use **EntryDate** and **ExitDate** to create initial enrollments, update existing enrollments, and add multiple enrollments. Ensure that the dates reflect when the actual changes took place for a particular student's enrollment. For example, if a student moves into your district, for **EntryDate** enter the date of the student's first day of school in your district.
- Students may not be enrolled in two districts at the same time.

This partial figure illustrates the fields in the Roster import template.

Entry/Exit Dates for an Initial Enrollment

To create an initial enrollment:

- For **EntryDate**, enter the date that the enrollment will take effect.
- For **ExitDate**, enter the date of the last day of the school year.

Entry/Exit Dates for Updating Enrollments

To update an existing enrollment:

- Enter the Entry and Exit dates that will replace those of the existing enrollment.

- Be sure to enter the dates correctly in order to not orphan a Benchmark test score. All Benchmark test administration dates must fall within a class or school's Entry and Exit dates.   If both the Entry and Exit dates are before or after a Benchmark test administration date, the application will reject the update and include the following error message on the Roster Import Failed Report: "Student - Student UID: <Student ID> Error: New Enrollment Dates will Orphan a Score."

Entry/Exit Dates for Multiple Enrollments

If a student exits and re-enters a class or school, each enrollment must be in the file.

- For **EntryDate**, enter the first date that particular enrollment went into effect.
- For **ExitDate**, enter the last date of the student's enrollment.

To create multiple enrollments in the file, add a new row for each Entry/Exit set of dates. The additional row(s) may be added above or below the current row. The system will read and organize the dates correctly.

To create new rows in Excel:

- To insert a new row, select the existing row and right-click in the left (numbered) column. Click **Insert**. A new row is inserted above the original.
- To copy a row, select the current row, right-click on that row number and click **Copy**. To paste the copied row, right-click on the next row number (even if it contains data) and select **Insert Copied Cells**.

Entry/Exit Dates Example of Multiple Rows for Multiple Enrollments

The following figure illustrates dates for three enrollments. The dates are not in sequential order and do not need to be.

Multiple Rows for Multiple Enrollments

Data Changes Made with an Import

Imported items that do not exist within aimswebPlus are created. This includes districts, schools, teachers, classes, rosters, and students. Data within an import file becomes the new current state of the data. Unique Identifiers prevent data being lost, duplicated, or overwritten.

Data is handled as follows:

- Match criteria rules are handled independently. Thus, if a single row has an update to the district and an update to the school and an update to the class and an update to the teacher and an update to the student, all updates are made and are independent of each other.

- **Insertions**: Information contained within an import file that cannot be matched in aimswebPlus is created.

- **Updates**: Pre-existing items are updated if imported items are matched by Unique Identifiers.

- **Inactivated**: Districts, Schools, Teachers, Students, Classes, and Rosters that do not exist in the import file will be marked inactive in aimswebPlus.

Data Inactivated if not in Your File

If you leave the following data out of your file and if the same data exists in aimswebPlus, the aimswebPlus data will be deactivated.

| District List	If you leave out a district: ♦ The district and its schools, classes, and students in that district will be deactivated. ♦ Enrollment dates will end on the processing date. Student scores will be preserved.
School List	If you leave out a school: ♦ The school and its classes, students, and all school level student lists in that school will be deactivated. ♦ Enrollment dates will end on the processing date. Student scores will be preserved.
Class List	If you leave out a class: ♦ The class and all class-level enrollment records will be ended. ♦ If the class teacher has no other assignments and does not have any non-teacher roles, the teacher will be set to inactive. If the teacher has other assignments, he or she will be removed from the class, but not set to inactive. ♦ Enrollment dates will end on the processing date. Student scores associated with the class will be preserved.

Roster	If you leave out a student or roster:
	♦ If you leave out a student, the student will be deactivated. To reactivate, add the student to a subsequent roster import file and give the student the same UID. Set the Active column to 1 (TRUE) and set the Entry Date to a later date than the student's previous enrollments.
	♦ If you leave out a roster, the students will be de-rostered from the enrollment and will instead be rostered into the Account as inactive.
	♦ When a student is deactivated because enrollment ended as of the processing date, and there are associated scores for benchmarking and/or progress monitoring (either in current or past years), student scores will be preserved.
	♦ If today's file has the same student in the same class and the enrollment dates differ, the old enrollment dates will be honored and a warning displayed that the student had overlapping enrollment dates. To extend a student's enrollment dates, supply a file that has an Entry Date that matches the current enrollment and Exit Date that extends the current enrollment for the same class.

Save the File

The template is in Microsoft Excel format (**.xlsx)** and must be saved as a tab-delimited text file while you are on the Template tab.

1. Click the Template tab to make it the current view.

2. Click **Save As**. The following text options may be listed. Select **Text (Tab delimited) (*.txt)**

   Text (Tab delimited) (*.txt)
   Unicode Text (*.txt)
   Text (Macintosh) (*.txt)
   Text (MS-DOS) (*.txt)
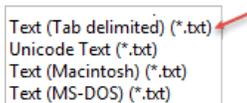
3. Click **Save** and select your preferred folder.

4. When you are ready to import the file, go to **Manage > Import** and select the file. A delay will occur between the successful completion of an import and the newly mported data.

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4   Exporting Data

Managers may export student, teacher, class, user, monitor, and score data as well as demographic information. Exported Roster and User data includes all of the data that included in the Roster and User templates.

Options for filtering these data exports include: school year, assessment period, demographics, and more. Exports can happen frequently—on any schedule that is required or convenient.

Exports are performed in **Manage > Export**. The Export Data wizard guides you through the process of exporting data from the aimswebPlus database. Completed exports are retrieved from within the secure system.

Exports are useful for managing information for students who move out of the district; if they re-enroll, the historic data will be available. Roster and User export files may be updated and used to update your organizational data within the system.

A notification appears when the report is complete. To resubmit a new export using the same settings as a previous job, click the file name. Completed files are available for download for 30 days.

Export Roster Data

1. Click **Manage**.

2. Select **Export File**. The Export File form is displayed.

3. For Type, select Roster File.

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4. For **School Year**, click the drop-down to select the year.

5. **All Account** is for account managers only and not visible to other users. This allows the account manager to export data for the entire account. When selected, the Roster text field is disabled.

6. For **Roster**, enter a few letters of the roster name and wait briefly to view to select from the list of similarly named rosters that appears. To clear the entry, click the "X".

7. Click **Submit**.

Export User Data

1. Click **Manage** and select **Export File**. The Export File form is displayed.

2. For **Type**, select User File.
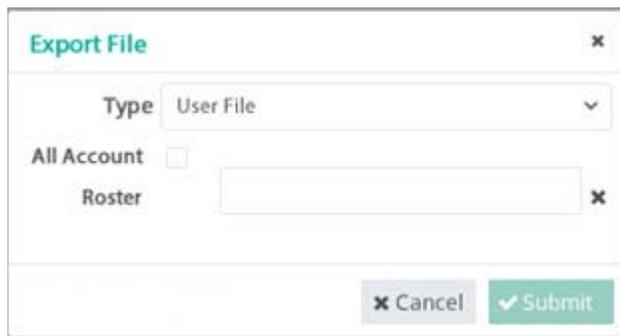
3. **All Account** is for account managers only and not visible to other users. This allows the account manager to export data for the entire account. When selected, the Roster text field is disabled.

4. For **Roster**, enter a few letters of the roster name and wait briefly to view and select from the list of similarly named rosters. To clear the entry, click the "x".

5. Click **Submit**.

Export Score Data

To export a score file:

1. For **Type**, select Score File.

    ![Export File dialog showing Type: Score File, School Year: '16-17, Score Type: All, Batteries/Measures: All, Periods (Fall, Winter, Spring checkboxes), Include (Natl %, SGP, Risk Status checkboxes), For Account checkbox, Roster field, Cancel and Submit buttons.]

2. Select a **School Year**. All school years for the account are displayed. The default is the current year.

3. Select a **Score Type**. Options: All, Benchmark, or Monitor.

4. Select **Batteries/Measures**. The list shows those available for the account and grade. Select the Periods and Percentile monitoring measures to include.

Periods displays the school year of each available subscription: Fall, Winter, or Spring. Periods are not shown if score type is Monitor.

Include shows the options for percentile monitoring measures to include. Options depend on the Score Type selected (Natl%, SGP, Risk Status)

- **Periods**: If score type is Benchmark or All, select the desired Periods and include options.

- **Include**: If score type is Monitor, select whether to include the National Percentile (Natl %ile) scores. Risk status is based on the roster selection (unless the selection is account, in which case it is school).

- **All Account** is for account managers only and not visible to other users. This allows the account manager to export data for the entire account. When selected, the Roster text field is disabled.

5. For **Roster**, enter a few letters of the roster name and wait briefly to view to select from the list of similarly named rosters that appears. To clear the entry, click "x".

6. Click **Submit**. A status message indicates whether the file generated successfully or failed.

7. To obtain the file, go to the Notification History page.

View the Export Status

When you are notified that the export is complete, click **Manage > Notification History** and view the report in the Notification History box. A summary indicates whether the export was successful. Successful exports can be saved for later import.

5   Changes Not Allowed while ABI is Enabled

Automated Batch Import (ABI) is available to your account by special purchase. If ABI is enabled for your account, you cannot make the following changes in aimswebPlus.

Note: ABI remains enabled unless the Account Manager asks Pearson to have it disabled. However, the Account Manager may suspend/resume ABI in order to perform these changes on the Manage Account Settings screen. For information about ABI, contact the aimswebPlus Data Team.

District List	Add/edit/delete not allowed.
School List	Add/edit/delete not allowed.
Class List	Add/edit/delete not allowed.
Student Roster	School or class: add/roster selected students to school system/delete not allowed. District-level: add/roster selected students to schoolsystem/delete not allowed. Account-level: add/roster selected students to schoolsystem/delete not allowed.
Student Profile	View only, edits not allowed.
Manage Account Settings	Import is disabled.
User Account Management	Add/edit/delete/primary role change/adding additional roles not allowed. Inactive users may not be selected (as they otherwise may be, via the toggle) to display in the aimswebPlus User Account Management List.
Notification History	Deleting not allowed.

6   Contacting the aimswebPlus Data Team (OST)

To contact us for assistance:

♦ Phone: 1(866)313-6194 Option 1, Option 3.

♦ aimswebdata@pearson.com

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