Formatting and Importing Data Guide

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Part I | Understanding Import Requirements and Formats

A BRIEF INTRODUCTION

Blackboard Connect for Teachers is a state of the art teacher-to-parent communication tool that allows teachers to easily communicate with parents in their preferred language. Teachers enter a secure site and can view a list of only their students. Teachers simply click on student names and select from a list of more than 140 comments regarding student performance and behavior, each recorded in 22 languages.

This guide will help you understand how to format and import the data such that your teachers will only see their classes and their rosters, by reviewing the following steps in details.

THREE FILES – TEACHER DATA, COURSE DATA, ENROLLMENT DATA
The *BLACKBOARD CONNECT FOR TEACHERS* service requires three distinct files that are imported in a specific order. The first file to be imported, Teacher Data File, establishes the users of the system. The second file, Course Data File, assigns appropriate courses to the list of established users. The third and final file, Enrollment Data File, assigns students to the list of courses. The three data sets come together to give your teachers the ability to target comments to their students' parents. **Import the three files each time *Blackboard Connect for Teachers* data is updated. 1. Teacher Data File → 2. Course Data File → 3. Enrollment Data file.**

IDENTIFY AND EXPORT DATA FOR THE BLACKBOARD CONNECT FOR TEACHERS ACCOUNT
Most student information systems allow users to select specific data using queries or reports that can be saved and/or exported as a data file. This guide provides instructions to prepare exported data for the *BLACKBOARD CONNECT FOR TEACHERS* system. (Note: If you do not use a database to store data, contacts can be entered into a spreadsheet application such as Microsoft Excel®.) Review the data requirements in this guide to understand, create, and import error-free files for the *BLACKBOARD CONNECT FOR TEACHERS* service.

ENSURE FIELD HEADERS MATCH EXACTLY
The first row in each data file must correspond exactly with the required *Blackboard Connect for Teachers* field headers to be successfully imported. Subsequent sections will explain exactly which headers are needed for each file and how to format them. (Note: Field headers must not contain spaces and are not case-sensitive.)

SAVE THE FILES IN A VALID FILE FORMAT
In order to import data into *Blackboard Connect for Teachers*, save the finalized data files in either a comma-delimited (*.csv) or tab-delimited (*.txt) file format.

AUTOMATE THE DATA IMPORTS
Once you have successfully extracted, formatted, and imported the three files a few times, you can automate the import process. Contact Blackboard Connect Client Care at (866) 435-7684 or teachersupport@blackboardconnected.com for more information.

Part II | Creating the *Blackboard Connect for Teachers* Data Files

1. CREATING THE TEACHER DATA FILE

The Teacher Data File contains the information required to establish your teachers as **users** of the *Blackboard Connect for Teachers* service. This section outlines the data required for every teacher in the school/district who should have access to the *Blackboard Connect for Teachers* service.

A) TEACHER DATA FIELDS

Field Header	Description
Institution*	Unique identifier for each school
ReferenceCode*	Employee ID
Prefix	Ms., Mrs., Miss, Mr., Dr., Professor, Rabbi, Monsignor, Sister
FirstName*	First name
LastName*	Last name
Gender*	Female, Male
EmailAddress*	E-mail Address
Terminate	Indicates if a teacher is no longer connected with a school

*Required Fields

B) TEACHER DATA FIELD NOTES
- The **Institution** field is required to load contacts from multiple schools in one file. You must provide the institution name (or code) that the teacher is associated with. Each institution's name or code must be submitted to your Client Care representative before importing, to ensure teachers are imported into the correct school accounts.
- The **ReferenceCode** must identify the teacher by employee ID or other unique identifier.
- Any of the following codes are accepted in the **Gender** field: *F, Female, Females, M, Male, Males*.
- **Gender** and **Prefix** fields are used to announce the teacher's messages on calls sent home. At least one of these fields is required for every user. If only the **Gender** field is used, teacher prefixes will either be "Mr." or "Ms." when comments are sent home to parents.
- The system requires the **EmailAddress** field because *Blackboard Connect for Teachers* sends access information to all teachers via e-mail. Any teacher without a valid e-mail address will not be created as a user.
- The **Terminate** field indicates that a teacher is no longer associated with an institution. Any data entered in this field will cause the system to remove the user. Leave this field empty for an active teacher.
- Field headers must not contain spaces and are not case-sensitive. The order of data field columns does not matter.

C) SAMPLE TEACHER IMPORT FILE

Institution	ReferenceCode	Prefix	FirstName	LastName	Gender	EmailAddress	Terminate
243	0053487	Mr.	Mark	Doe	M	mdoe@domain.com	
511	0173341	Ms.	Maria	Garcia	F	mgar@domain.com	
655	0043259	Mr.	Matt	Lewis	Male	mlew@domain.com	
655	0923444	Miss	Megan	Farmer	Female	mfar@domain.com	

Part II | Creating the *Blackboard Connect for Teachers* Data Files

2. CREATING THE COURSE DATA FILE

This section outlines the data required to associate each teacher with his or her corresponding class(es).

A) COURSE DATA FIELDS

Field Header	Description
Institution*	Unique identifier for each school
Course*	Course identifier – sometimes, but not always, unique
Section*	Provides additional unique identifier for more than none course with the same ID
CourseName	Course or grade-level description, i.e. "Algebra II"
Period	Designates the period during which the instructor conducts the course
ReferenceCode*	Employee ID of the teacher who instructs this course
Terminate	Indicates a teacher's connection with a course

*Required Fields

B) COURSE DATA FIELD NOTES

- The **Institution** field is required to load courses from multiple schools in one file. You must provide the institution name (or code) that the course is associated with. Each institution's name or code must be submitted to your Client Care representative before importing, to ensure courses are imported into the correct school accounts.
- The **ReferenceCodes** must correspond with those provided in the **Teacher Data** file.
- Elementary schools may use either the teacher's name or ID as the required **Course** field, while secondary schools typically use codes to identify classes.
- The **Section** field is required when courses with the same identifier (**Course**) are provided.
- Provide one row for each course that a teacher is responsible for. If a teacher teaches three classes, there should be three rows provided in the Course Data file for that teacher.
- Where possible provide a **Period**, as this information is displayed on the user interface, making it easier for a teacher to sort by class period when sending messages.
  - If you cannot provide **a Period** (many elementary schools will have no need), provide the **CourseName** field and this will be displayed
  - If neither a **Period** nor a **CourseName** is provided, the **Course** field will be displayed in the teacher's user interface.
- The **Terminate** field indicates that a course is no longer associated with an institution. Any data entered in this field will cause the system to remove the course. Leave this field empty for an active course.
- Field headers must not contain spaces and are not case-sensitive. The order of data field columns does not matter.

C) SAMPLE COURSE DATA FILE

Institution	Course	Section	CourseName	Period	ReferenceCode	Terminate
511	60-21	104	Algebra 1	2	0043259	
511	60-21	106	Algebra 1	3	0043259	
511	61-20	102	Algebra 2	4	0043259	
243	Mdoe		First Grade		0053487	
243	Mgarcia		Second Grade		0173341	

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Part II | Creating the *Blackboard Connect for Teachers* Data Files

3. CREATING THE **ENROLLMENT DATA** FILE

This section outlines the data required to associate students with the courses supplied by the **Course Data** file.

A) ENROLLMENT DATA FIELDS

Field Header	Description
Institution*	Unique identifier for each school – details below
ReferenceCode*	Student ID
Course*	Course identifier
Section*	Provides additional unique identifier for more than none course with the same ID
Terminate	Indicates the student's enrollment status in the designated course – details below

*Required Fields

B) ENROLLMENT DATA FIELD NOTES

- The **Institution** field is required to load student rosters from multiple schools in one file. You must provide the institution name (or code) that the student is associated with. Each institution's name or code must be submitted into your Client Care representative before importing, to ensure student rosters are imported to the correct school accounts.
- Provide a row to assign a student to a course. **Course** and **Section** information must correspond exactly to the information in the Course Data file.
- Add additional rows for a student enrolled in more than one course. If a student has eight courses, there should be eights rows provided in the **Enrollment Data** file for that student.
- Student **ReferenceCode**s must be provided and must correspond exactly to the **ReferenceCode**s supplied to the Blackboard Connect database.
- The **Terminate** field indicates that a student is no longer associated with a course. Any data entered in this field will cause the system to remove the student from the course roster. Leave this field empty for an active student-course relationship.
- Field headers must not contain spaces and are not case-sensitive. The order of data field columns does not matter.

C) SAMPLE ENROLLMENT DATA FILE

Institution	ReferenceCode	Course	Section	Terminate
243	223459	Mdoe		
243	942732	Mgarcia		
511	354116	50-11	100	
511	354116	19-33	101	
511	354116	71-3	200	
655	155968	14-22	141	

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IMPORTING FROM THE DISTRICT-LEVEL

District users wishing to import files containing data for multiple schools must include the field header **Institution** that contains a unique code identifying the school to which the data belongs. If you are a Blackboard Connect user at a school, proceed to page 7.

When importing *Blackboard Connect for Teachers* data, files must be imported in a specific order: first the **Teacher Data** file, followed by the **Course Data** file and finally the **Enrollment Data** file. Every time *Blackboard Connect for Teachers* is updated, this import order must be followed.

In order to access the *Blackboard Connect for Teachers* importing tools, first sign in to Blackboard Connect and click the Contacts tab. Click the [Import Contacts] button, then click the *Teacher Importer* sub-tab and follow these instructions.

1. **Select your Data File**
    Click the *Browse* button to locate your file (Teacher, Course, or Enrollment).

2. **Select the Site**
    Choose the site for which you are importing this data. If importing for all or multiple schools in the district, set the dropdown filter to *ALL* and be sure to include an **Institution** field in the data file.

3. **Select the Data Type**
    Use the dropdown filter to select whether this file is a Teacher, Course or Enrollment data file. (Remember: The files must be imported in the following order: **1. Teacher → 2. Course → 3. Enrollment**)

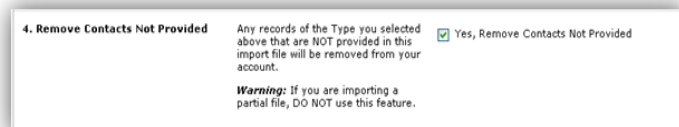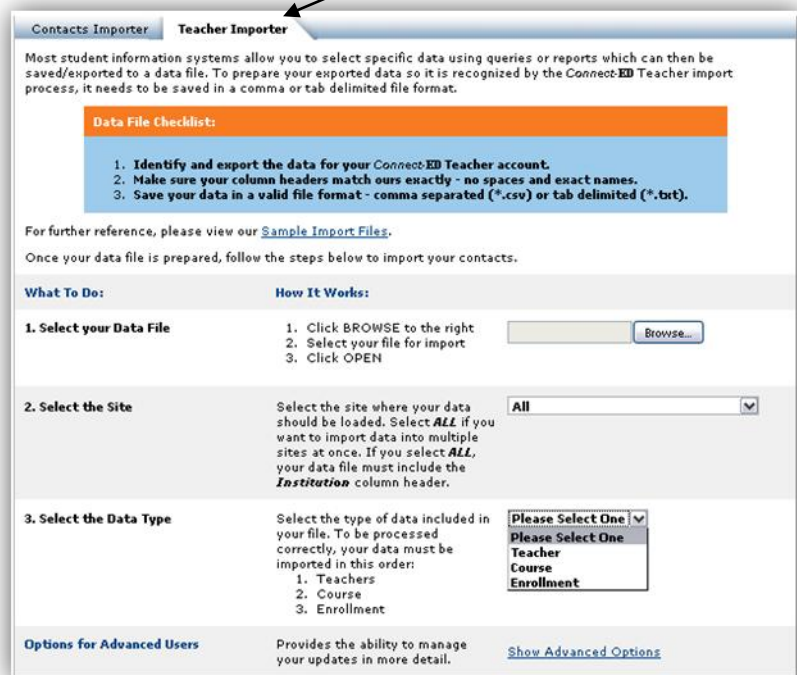   **Options for Advanced Users**
    Click the Show Advanced Options link.

4. **Remove Contacts Not Provided**
    Check this box if you are importing a complete data file. If this box is checked, any data that is currently in the system but not in the file will be deleted.

5. **Click** [Import] .

6. **Import Results will be displayed once each file's import has completed. Review the results. You may download any Records Rejected to identify errors preventing success.**

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IMPORTING FROM THE SCHOOL-LEVEL

When importing *Blackboard Connect for Teachers* data, files must be imported in a specific order: first the **Teacher Data** file, followed by the **Course Data** file and finally the **Enrollment Data** file. Every time *Blackboard Connect for Teachers* is updated, this import order must be followed.
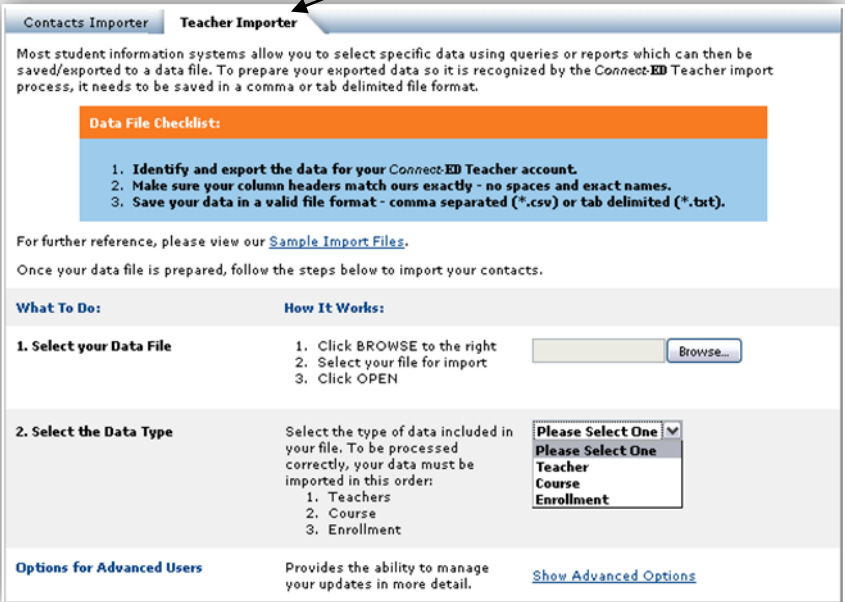
In order to access the *Blackboard Connect for Teachers* importing tools, first sign in to Blackboard Connect and click the Contacts tab. Click the Import Contacts button, then click the *Teacher Importer* sub-tab and follow these instructions.

1. **Select your Data File**
   Click the *Browse* button to locate your file (Teacher, Course, or Enrollment)

2. **Select the Data Type**
   Use the dropdown filter to select whether this file is a Teacher, Course or Enrollment data file.

   (Remember: The files must be imported in the following order:
   1. Teacher → 2. Course → 3. Enrollment)

   Options for Advanced Users
   Click the Show Advanced Options link.

3. **Remove Contacts Not Provided**
   Check this box if you are importing a complete data file. If this box is checked, any data that is currently in the system but not in the file will be deleted.

4. **Click** Import .

5. **Import Results will be displayed once each file's import has completed. Review the results. You may download any Records Rejected to identify errors preventing success.**

TEACHER DATA FILE RESULTS

After importing the **Teacher Data** file, you will be able to download a list of any records containing warnings or rejections. This information will help you identify issues of data integrity and provide the information needing attention.

Possible Import Results:

➢ **Rejection – Institution not found**
  o The data provided in the Institution field for this record is not recognized. Provide a recognized institution code/name.

➢ **Rejection – Institution not provided**
  o The Institution field was left blank. Please provide a valid Institution code.

➢ **Rejection – ReferenceCode not provided**
  o No data was provided in the ReferenceCode field for this record. Provide the required data in the ReferenceCode field for each record.

➢ **Rejection – Same EmployeeID assigned to different teachers**
  o The same ReferenceCode was provided for two different teachers. Provide a unique ReferenceCode for each teacher.

➢ **Rejection – LastName not provided**
  o No data was provided in the LastName field for this record. Provide the required data in the LastName field for each record.

➢ **Rejection – EmailAddress is a required field and must be provided in a valid format. EmailAddress provided: [EmailAddress]**
  o An email address was not provided or, if provided, it was not valid. Provide a valid email address for each record.

➢ **Error – Duplicate found, One processed other ignored**
  o Duplicate records were included in this file. One was imported/updated and the other was ignored. No action required.

➢ **Ignored – [Teacher] Already Terminated**
  o The record provided for Termination was already terminated. No action required.

➢ **Ignored – [Teacher] does not exist in system**
  o The record provided for Termination does not exist in the system and therefore could not be terminated. No action required.

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COURSE DATA FILE RESULTS

After importing the **Course Data** file, you will be able to download a list of any records containing warnings or rejections. This information will help you identify issues of data integrity and provide the information needing attention.

Possible Import Results:

➢ **Rejection – Institution not found**
  o The data provided in the Institution field for this record is not recognized. Provide a recognized institution code/name.

➢ **Rejection – Institution not provided**
  o The Institution field was left blank. Please provide a valid Institution code.

➢ **Rejection – ReferenceCode not provided**
  o No data was provided in the ReferenceCode field for this record or does not match the ReferenceCode of an existing teacher.. Provide the ReferenceCode required data in the ReferenceCode field for each record. The ReferenceCode here refers to those contained in the Teacher data file.

➢ **Rejection – Course not provided**
  o No data was provided in the Course field for this record. Provide the required data in the Course field for each record.

➢ **Rejection – Duplicate rows in import. Course and Section must be unique per row.**
  o At least two rows contain the same Course and Section information but are listed as a different Peiord number of CourseName, and both rows are rejected. This information must be unique.

➢ **Error – Duplicate found, One processed other ignored**
  o Duplicate records were included in this file. One was imported/updated and the other was ignored. No action required.

➢ **Ignored – [Course] Already Terminated**
  o The record provided for Termination was already terminated. No action required.

ENROLLMENT DATA FILE RESULTS

After importing the **Enrollment Data** file, you will be able to download a list of any records containing warnings or rejections. This information will help you identify issues of data integrity and provide you with information needing attention.

Possible Import Results:

➢ **Rejection – Institution not found**
  o The data provided in the institution field for this record is not recognized. Provide a recognized institution code/name.

➢ **Rejection – Institution not provided**
  o The Institution field was left blank. Please provide a valid Institution code.

➢ **Rejection – ReferenceCode not provided**
  o No data was provided in the ReferenceCode field for this record. Provide the ReferenceCode required data in the ReferenceCode field for each record. The ReferenceCode here refers to those belonging to the students, and therefore must correspond to those in the Blackboard Connect database.

➢ **Rejection – ReferenceCode not found**
  o The ReferenceCode provided was not found in the Blackboard Connect database. Provide an existing student ReferenceCode.

➢ **Rejection – Course not provided**
  o No data was provided in the Course field for this record. Provide the required data in the Course field for each record.

➢ **Error – Duplicate found, One processed other ignored**
  o Duplicate records were included in this file. One was imported/updated and the other was ignored. No action required.

➢ **Ignored – [Student ReferenceCode] Already Terminated**
  o The record provided for Termination was already terminated. No action required.