

Batch Enrollment Step-by-Step Instructions

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Step 1a: Import File

Selecting Import File from the Administration > Batch Enrollment (v2) menu will take you to the first page of the new batch enrollment process. Start by clicking the blue Download Template button. This will generate a CSV template with all the correct column headings already listed across the top, ready for you to fill in with your learners' data. If you want to view data requirements and definitions at any time, select the Field Definitions button.

Once you have filled out your template with your learners' data, you can use the Select File button or drag and drop your file to the Import File page. Please verify that your file format has not changed from .csv. The Delimiter will default to Comma for CSV file types, like the template, so it does not need to be changed. Then, click Upload File.

Select Import File

Select file or Drop a file here

Status:

File Name:

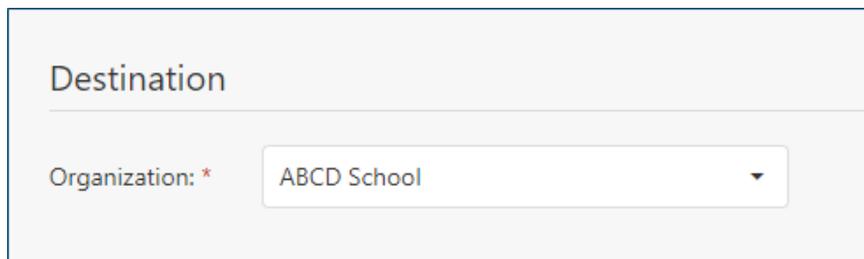
Delimiter: * Comma (,)

Upload File Download Template Field Definitions

Step 1b: Destination

Once you have uploaded your file, select your Organization.

If a user has access to more than one organization and permissions to enroll in multiple organizations, they will now see the Transfers section under Destination.

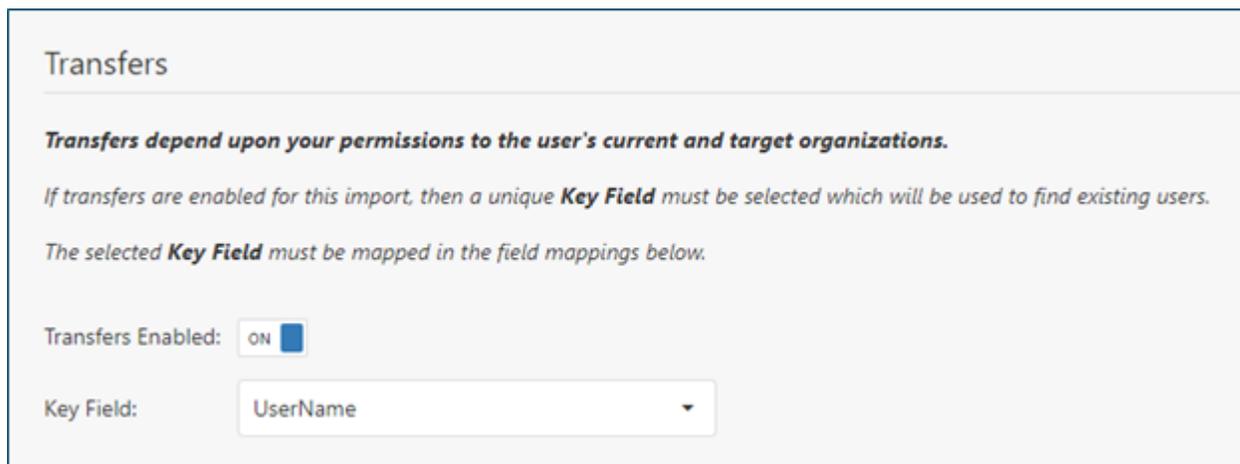


The screenshot shows a form titled "Destination". Below the title is a label "Organization: *" followed by a dropdown menu. The dropdown menu is open, showing "ABCD School" as the selected option.

Step 1c: Transfers

To use the Transfers feature, toggle the Transfers Enabled toggle to On.

If transfers are enabled for the import, then a unique Key Field must be selected which will be used to find existing users. Once the Transfers Enabled toggle is On, the Key Field dropdown will become active, select the Key Field you would like to map on. The default is Username but if there is a unique custom field, that will also be available in the dropdown.



The screenshot shows a form titled "Transfers". Below the title is a bolded instruction: "Transfers depend upon your permissions to the user's current and target organizations." Below this is a paragraph: "If transfers are enabled for this import, then a unique **Key Field** must be selected which will be used to find existing users." Below that is another paragraph: "The selected **Key Field** must be mapped in the field mappings below." Below these instructions is a toggle for "Transfers Enabled:" which is set to "ON" with a blue square. Below the toggle is a label "Key Field:" followed by a dropdown menu. The dropdown menu is open, showing "UserName" as the selected option.

Step 2: Map Fields

Once you have clicked Upload File, the Map Fields section of the page becomes active. Depending on your screen size and settings, you may need to scroll down to see the Map Fields section.

Map Fields

Map the user fields from your file (**File Columns**) to the fields available in the application (**Application Fields**) by selecting an **Application Field** from the drop down menu for each row. Unmapped fields will not be imported. You must map **Required Fields** in order to process the import.
 If you do not map username and/or initial password, they will be automatically generated by the system.

File Columns	Application Fields
First Name	First Name <input type="checkbox"/> ▼
Last Name	Last Name <input type="checkbox"/> ▼
Middle Name	Middle Name <input type="checkbox"/> ▼
Password	Password <input type="checkbox"/> ▼
User Name	User Name <input type="checkbox"/> ▼
Require Password Change	Require Password Change <input type="checkbox"/> ▼
Grade Level	Grade Level <input type="checkbox"/> ▼
Gender	Gender <input type="checkbox"/> ▼
Unique Identifier	Unique Identifier <input type="checkbox"/> ▼
Race and Ethnicity	Race and Ethnicity <input type="checkbox"/> ▼
Zip Code	Zip Code <input type="checkbox"/> ▼

Required Fields

- Date of Birth
- First Name
- Gender
- Grade Level
- Graduation Year
- Last Name
- Unique Identifier

Mapping fields simply means you are telling the system where to put the data from each of your File Columns from your uploaded file. The system will auto-map file columns with headers that match the Application Fields. Since your template headers directly match the application fields, they should all auto-map, but if you are having trouble with this step, see the Mapping Fields Troubleshooting section below.

Notice the required fields will all turn green when they have been mapped, and the Submit for Validation button will become active.

Required Fields

- Date of Birth
- Ethnicity
- First Name
- Gender
- Grade Level
- Graduation Year
- Last Name
- Race
- Unique Identifier

Notice the required fields will all turn green when they have been mapped, and the Submit for Validation button will become active. Once your file is ready and all fields are mapped, select Submit for Validation and you will be transitioned to the Import Review page automatically.

Step 3: Import Review

On the Import Review page, you will review a summary of your file and complete the enrollment process. If you have just been transitioned from the Import File page, your recently imported file should automatically load into the Review panel with details telling you which records passed validation successfully, which are transfers, and which have errors that require correction before enrollment. Depending on your screen size and settings, you may have to scroll down to view the File Summary and Import Review Table.

File Information

File Name: BatchEnrollmentTemplate_ABC School District Stage.csv
 Organization: ABCD School
 File Status: Records Pending
 Transfers Enabled: **on** Transfers Key Field: UserName
 Upload Date: 9/23/2024 11:00 AM Uploaded By: Ashley Taylor (ataylor@winlearning.com:818)

[View Map](#) [Field Definitions](#) [Select File](#)

File Summary

Record Count: 3	Validated: 3	Imported Successfully: 0
	Validation Failures: 0	Imported w/Validation Messages: 0
	Manually Validated: 0	Edited and Resubmitted: 0
	Discarded: 0	Errors During Import: 0
	Pending Validation: 0	Pending Import: 0
	Transfers: 3	

Step 4: Data Validation and Submission

If you filled out all the Batch Enroll Template data correctly, you should see “Validated Successfully” in the Status column for all records.

If Transfers are Enabled, under Is Transfer you should see “Yes”, under Current Org you will see the learner’s current Organization, and in the Destination Org you will see the learner’s destination Organization.

Import Pending Records

[Download Roster...](#)

 Search criteria...

Row Actions	Record Number	Record Version	Status	Is Transfer	Current Org	Destination Org	Time Validated	Time Imported	First Name <i>FirstName</i>	Last Name <i>LastName</i>
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1	1	Validated Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Jemmy	Fraser
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	2	1	Validated Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Tanjiro	Kamado
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	3	1	Validated Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Test	Quality

You must submit your records. Validation failures and how to fix them will be discussed further in the Troubleshooting section.

Once all your records have been successfully validated, click the Select All box at the top of the record selection column, then click the bold checkmark above the Row Actions (between the trash can and the refresh button). Alternatively, select a check box for an individual record(s), and then the check mark in the row if you do not wish to import the entire file.

Download Roster... Import Pending Records

Row Actions	Record Number	Record Version	Status	Time Validated	Time Imported	First Name FirstName	Last Name LastName	Middle Name MiddleName	Password Password	User Name UserName	Require Password Change RequirePasswordChange	Email Email	Grade Level Grade Level
<input checked="" type="checkbox"/>	1	1	Validated Successfully	3/10/2023, 1:32 PM		John	James				No		12
<input checked="" type="checkbox"/>	2	1	Validated Successfully	3/10/2023, 1:32 PM		Jane	Adams				No		12
<input checked="" type="checkbox"/>	3	1	Validated Successfully	3/10/2023, 1:32 PM		Bill	Jones				No		12

IMPORTANT: After selecting the record(s) and clicking the checkmark, be sure to click the now active Import Pending Records button just above the list of records, to complete the enrollment process for all learners who have been validated successfully.



Once you click Import Pending Records, button you will see a summary of changes and will be asked to confirm the enrollments. Clicking Continue will import all valid records and save all pending changes.

Confirm Import Actions

Are you sure you would like to continue with the following actions?

Import Action Summary

- Record(s) Validated Successfully: 3
- Record(s) Pending Import: 0
- Record(s) Discarded: 0
- Record(s) Edited: 1
- Record(s) Resubmitted w/o Editing: 0

Back on the Import Review page, clicking the Refresh icon above the Import Review table will show the latest statuses. When all records are imported successfully, the rows turn green, and the Status reads "Imported Successfully." Depending on the number of records, you may need to click the refresh button more than once for all record rows to turn green.

Row Actions	Record Number	Record Version	Status	Is Transfer	Current Org	Destination Org	Time Validated	Time Imported	First Name FirstName	Last Name LastName
<input type="checkbox"/>	1	1	Imported Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Jemmy	Fraser
<input type="checkbox"/>	2	1	Imported Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Tanjiro	Kamado
<input type="checkbox"/>	3	1	Imported Successfully	Yes	1234Valencia	ABCD School	9/23/2024, 11:11 AM		Test	Quality

From this page you can now download a roster of the students who were successfully enrolled, and there is an option to include passwords in the roster. Note that you must select Save to finish the enrollment process before downloading your roster.



Download Roster

Include password in roster.

Download

Troubleshooting Guide

Import File Troubleshooting

If you are having trouble with steps 1 and 2, see the troubleshooting instructions below.

Select Import File Troubleshooting

If you are having trouble with selecting a file for import, make sure that you are trying to import the recommended file type: CSV. Other file types are supported, but XLS (Excel) file types are not supported. For the best experience, we recommend downloading the template and viewing the Field Definitions before attempting to upload your file.

Mapping Fields Troubleshooting

File Columns from your data file that do not match (or nearly match) their corresponding Application Fields will need to be mapped so that the system knows where to record your data. Depending on your screen size and settings, you might have to scroll down INSIDE the Application Fields box to view all mapping opportunities.

In the following example, notice the system will recognize "grade level" as "Grade Level" in the application even though it is capitalized differently, but the date-of-birth header in the File Columns is "DOB" which needs to be mapped to the "Date of Birth" Application Field. Note that Date of Birth is listed under Required Fields. It will not turn green in that list until it is mapped. The Submit for Validation button will remain inactive until all required fields are mapped.

Map Fields

Map the user fields from your file (**File Columns**) to the fields available in the application (**Application Fields**) by selecting an **Application Field** from the drop down menu for each row. Unmapped fields will not be imported. You must map **Required Fields** in order to process the import.

If you do not map username and/or initial password, they will be automatically generated by the system.

File Columns	Application Fields
User Name	User Name <input type="checkbox"/>
Require Password Change	Require Password Change <input type="checkbox"/>
grade level	Grade Level <input type="checkbox"/>
Gender	Gender <input type="checkbox"/>
Unique Identifier	Unique Identifier <input type="checkbox"/>
Race and Ethnicity	Race and Ethnicity <input type="checkbox"/>
Shoe Size	Shoe Size <input type="checkbox"/>
Zip Code	Zip Code <input type="checkbox"/>
Graduation Year	Graduation Year <input type="checkbox"/>
DOB	Map field... <input type="checkbox"/>
Date Range	Date Range <input type="checkbox"/>

Submit For Validation

Clear Mappings

Required Fields

Date of Birth
First Name
Gender
Grade Level
Graduation Year
Last Name
Unique Identifier

File Columns	System Field(s)
User Name	Date of Birth
Require Password Change	Date Range
grade level	First Name
Gender	Gender
Unique Identifier	Grade Level
Race and Ethnicity	Graduation Year
Shoe Size	Last Name
Zip Code	Middle Name
Graduation Year	Map field...
DOB	Date Range
Date Range	Date Range <input type="checkbox"/>

If you do not map username and/or initial password, they will be automatically generated by the system. Other unmapped fields will not be imported. For example, if you add a column labeled "Class" but do not map it to Venue, the learners from your file will still be imported but they won't be associated with the designated class from your original file without the necessary mapping.

If all your fields are mapped correctly but some of your required fields have not turned green, that means that those columns are completely absent from your original file, and you will have to add them and start

over by re-uploading a new file with all required field information added. We recommend downloading and using a template from the Import File page to make sure you have all required fields included in your file.

Import Review Troubleshooting

If you are having trouble with steps 2a or 2b, continue to the troubleshooting instructions below.

Editing Records Troubleshooting

It is common for a file to have one or more errors during import. The example below shows three records that were validated successfully and one record that was validated with errors. The Import Review Table will allow you to edit the record before submitting for enrollment using the Save button.

Row Actions	Record Num...	Record Version	Status	Time Validated	Time Imported	FirstName	LastName	MiddleName	Email	InitialPas
<input type="checkbox"/>	1	0	Validated Successfully	3/26/2021, 12:50 PM		Sam	Central			
<input type="checkbox"/>	2	0	Validated Successfully	3/26/2021, 12:50 PM		Dean	Bean			
<input type="checkbox"/>	3	0	Validated Successfully	3/26/2021, 12:50 PM		Mary	Alice			
<input type="checkbox"/>	4	0	Validated With Errors	3/26/2021, 12:50 PM		Adam	Rogers			

Save

The tools in the Row Actions column allow you to edit (pencil icon), discard (bin icon), submit (bold checkmark), and view history (clock icon) for each record.

As previously instructed, for records that have Validated Successfully, click the checkmark to indicate you would like to import that learner. When you click Save, the learners will be successfully enrolled.

If a record needs editing due to a validation error, selecting the small triangle in the Row Actions column will expand the row to show the error messages.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	0	Validated With Errors
<p>A value for unique identifier is required. A value for Race is required. A value for Ethnicity is required.</p>						

Select the pencil icon on that row to open the system editor and make changes to your data. The Validation Messages dialog box at the top will remind you of what needs to be edited.

Edit Mapped Field Data

Validation Messages:

- A value for "Gender" is required.

First Name|FirstName:

Jessica

Last Name|LastName:

Test

Input or change any data that the system will not accept, and select Save inside the editor. Remember, there are Field Definitions available to help determine what the system will accept.

Once you have edited all records with errors, use the Save button at the bottom of the Import Review Table to submit the records with edits.

Row Actions	Record Number	Record Version	Status	Time Validated	FirstName FirstName	LastName LastName	Grade Level Grade Level	Unique Identifier Unique Identifier	Date of Birth Date of Birth
	<input type="text"/>	<input type="text"/>	(All) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	4	1	Edited And Resubmitted	3/26/2021, 12:50 PM	Adam	Rogers	9	456765456789100	7/17/00
	3	0	Validated Successfully	3/26/2021, 12:50 PM	Mary	Alice	9	1233455644456	7/16/00
	2	0	Validated Successfully	3/26/2021, 12:50 PM	Dean	Bean	9	123345561232	7/15/00
	1	0	Validated Successfully	3/26/2021, 12:50 PM	Sam	Central	9	123345569878	7/14/00

Here is an example of the most common errors:

<input type="checkbox"/>	Row Actions	Record Number	Record Version	Status
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		1	1	Validated With Errors
<ul style="list-style-type: none"> • A value for "Gender" is required. 				
<input type="checkbox"/>		2	1	Validated With Errors
<ul style="list-style-type: none"> • Password must contain at least one capital letter. • Password must contain at least one number. 				
<input type="checkbox"/>		3	1	Validated With Errors
<ul style="list-style-type: none"> • Duplicate UserName: jmctesting1@wintastic.com 				
<input type="checkbox"/>		4	1	Validated With Errors
<ul style="list-style-type: none"> • "13" is not a valid choice for field "Grade Level". 				

If a cell for a required field has been left blank, the system will tell you that it is required. If a password does not meet the security requirements, you will be prompted to update that. If a username already exists in the system, you will receive the "Duplicate UserName" error. If you input data that is not accepted by the system for a given field, it will say that your data is not a valid choice.

If you receive an error similar to the one shown below (it might say Student instead of Learner), it means that you did not select your destination organization in Step 1.

<input type="checkbox"/>	Row Actions	Record Number	Record Version	Status	Time Validated	Time Imported
		🔍	🔍	🔍	🔍 📅	
<input type="checkbox"/>	⌵ 🛠️ 🗑️ ✓ ⌚	1	1	Validated With Errors	5/19/2021, 10:15 AM	
<ul style="list-style-type: none"> Item type Learner cannot be added to organization JC Batch Enroll Demo of type JC Batch Enroll Demo. 						

For further assistance with Batch Enroll, you can contact WIN Learning Support at 888-717-9461, Option 3 or support@winlearning.com.

Import Review Definitions

Record Number – Identifies which record from the uploaded file it is

Record Version – Identifies which version of the record it is based on number of edits

Time Validated – Timestamp of when the record validated successfully

Time Imported – Timestamp of when the record imported successfully (student enrolled)

Status – Current state of the record in the enrollment process. Possible statuses include:

Validated Successfully – Data looks valid

Validated with Errors – Data issue identified

Pending Validation – Record is waiting for the system to perform validation

Edited and Resubmitted – Data edited and resubmitted for import

Discarded – User has chosen not to import the record

Pending Import – Record is waiting for system to import the record

Imported Successfully – Records imported successfully. Student(s) enrolled

Errors During Import – Record could not be imported due to an error

File Summary – Shows how many records were in the file, how many failed to import, how many are pending, and how many were imported successfully

Frequently Asked Questions

Can I use a non-template file for import?

You are no longer forced to download and import from a template file. You can use a pre-existing data file as long as it is saved as a .csv file type and includes all the required application fields. Other file types are

supported, but CSV is recommended. Note that .xls files are not compatible with the system and will generate an error if attempting to import.

Can I enroll into multiple Organizations with One File?

Administrators above the organization level (such as district-level administrators) now have the option to batch enroll into multiple sites/schools with one file. If you want to enroll to multiple organizations, first add a column to your file that is titled "Organization Name". Then, list the name of the organization (school, site, etc.) to which you are enrolling students exactly as it appears in Organization Administration inside the WIN Career Readiness System.

To view your class names, go to the Admin menu on your dashboard > Organization Administration > Manage Organizations. Select your organization type from the dropdown at the top, select Show All, and your organization names will appear below.

How do I Assign New Enrollees Directly to a Class in the System?

You can now enroll directly into classes with a similar method. Just add a "Venue Name" column to your file, and list the class to which the learner should be assigned in their respective row. You can only assign each learner to one class. If you have a group of learners who need to be assigned to one class and another group who needs to be assigned to another class, make sure you put the correct class name in the Class column for each learner. Note: you must use the exact class name from Class Management for this to work, and it will only apply to classes that have already been created in the system.

To view your class names, go to the Admin menu on your dashboard > Organization Administration > Class Management then select your organization from the dropdown on the left panel and your class names will appear below.

If you choose to add a "Class" column to your file to directly assign your students to a class, then you will map "Class" to "Venue Name" when mapping fields.

Can I Leave and Return to an In-Process File?

If you need to leave and come back to review your file after you've imported it, you can return to Import Review from the Admin > Batch Enrollment menu.

If you left and returned, you will have to click the blue Select File button and select the file that you previously imported that still needs review, and then select Load File.