

Quick Start Guide – Class Roster Import

Facilitators and Administrators can import class rosters and have them automatically created in WIN Career Readiness System. Multiple class rosters can be created for an organization with just one file upload. **This process creates new classes. It does not add users to existing classes.**

Prerequisite: Learners and Facilitators in the rosters must have active enrollments in WIN Career Readiness System.

Go to **Admin - Class Management - Import Roster**



There are 4 main steps to import a class roster:

Create File - Upload File – Map Fields – Validate Data

Step 1 Create File

Either **Download Template** or use an existing .csv file. Make sure your file has the required information and is configured correctly. Import files must be .csv.

Required fields: Class Name, and either Learner Username, WINCRS ID or Unique ID.

Optional fields: Facilitator(s) Username, Archive Date, Reset Date

Archive Date: On the date selected, this class will be archived.

Reset Date: On the date selected, all learners will be removed from the class so a new set of learners can be enrolled in the class.

You do not need to add yourself as a facilitator, but if you want to add additional facilitators you will need to include their username(s) or WINCRS ID(s) in the Facilitator column. You can pull Learner Usernames, WINCRSID, or Unique ID from User Administration if you don't have them elsewhere.

 A screenshot of a web form titled 'Select Import File'. The form has a text input field with a 'Select file' button and the text 'or Drop a file here'. Below this are labels for 'File Status:', 'File Name:', and 'Delimiter: *'. The 'Delimiter' dropdown menu is set to 'Comma'. At the bottom of the form are three buttons: 'Upload File', 'Download Template', and 'Field Definitions'.

Click **Field Definitions** for more details about requirements.

Your file can have extra student data if that helps you organize the roster; it will not interfere with the import. For example, you can include learners' first and last names or date of birth.

Save your file. If creating your file with Excel you must export or save as .csv. Review your .csv to ensure date fields did not get reformatted.

	A	B	C	D
1	Class Name	Archive Date	Additional Facilitator Username 1 (Optional)	Learner Username
2	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student1
3	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student2
4	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student3
5	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student4
6	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student5
7	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student6
8	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student7
9	Alvarez April 8 Room 400F	6/6/2027	alvarez.teacher	Student8
10	Baxter April 8 Room 201A	6/6/2027	baxter.teacher	Student9
11	Baxter April 8 Room 201A	6/6/2027	baxter.teacher	Student10
12	Baxter April 8 Room 201A	6/6/2027	baxter.teacher	Student11

Step 2 Upload File

Click **Select File** to upload your roster file or drag and drop your file to the designated area on the screen. Then click **Upload File**.

Once your file is uploaded, **select the organization** where the roster will be created. Rosters can be created at the school / location level. If you only have access to one organization, it will be pre-selected.

Destination

Organization: *

Step 3 Map Fields

Next, you will map fields to help the system know which column names in your file match which application field names. If column names match application names exactly, they will be pre-mapped. You do not need to map columns with extra data (e.g. Student name, date of birth).

File Columns	Application Fields
Class Name	Class Name ⓧ ▼
Additional Facilitator Username 1 (Optional)	Additional Facilitator Username ⓧ ▼
Additional Facilitator Username 2 (Optional)	Map field... ▼
Learner Unique ID	Learner Unique Identifier ⓧ ▼

Select **Submit for Validation**. The system will now validate all of the data in the file to make sure it can create the class(es).

You will automatically be directed to the **Review Roster Import** screen. If you have to leave and come back to complete the process you will go to Admin - Review Roster Import and select the file for the roster you want to complete.



Step 4 Validate Data

At the top of the screen is information about the file. Scroll down to the bottom half of the screen, which is where you will see if there are any data validation issues.

If there are any errors, there will be a warning icon on effected tab(s) 

This indicates areas that require your attention before completing the upload.

1. Class validation

2. Additional facilitator validation (optional)

3. Learner validation 

Each record below must be either submitted or discarded to proceed to the next step. You may edit any records before choosing to submit them if desired.





☐	Row Actions	ID	Record Number	Source Rows	Class	Reset Date	Archive Date	Status	Errors	Validation I...
☐	   	132390	1	5	ABC Section 2B			Validated Successfully		

There are three tabs and the process will validate the data in each.

1. **Class Validation** will display if there are any errors with creating the class. For example, if the class name already exists, you will see that error and need to correct it.
2. **Facilitator Validation** will display if there are any errors with finding or associating the assigned facilitators to the class, if you have added facilitators.
3. **Learner Validation** will display if there are any errors with finding or associating the assigned learners to the class.

Each record on each tab must be either submitted or discarded to proceed to the next step. This allows you the flexibility of making any changes before finalizing the roster upload. You may edit any records before submitting them by clicking the pencil and making edits.

To **submit**, select the record(s) and click the checkmark (Submit Record) either in the row, or at the top of the grid for bulk submission.

To **discard**, select the record(s) and then click the trash can either in the row, or at the top of the grid for bulk deletion.

1. Class validation

2. Additional facilitator validation (optional)

3. Learner validation 

Each record below must be either submitted or discarded to proceed to the next step. You may edit any records before choosing to submit them if desired.



Discard or Submit



☐	Row Actions	ID	Class	Matched Learner	Status	Errors	Validation I...	Mapped Locator Value
☐	   	1323...	ABC Section 2B	Monica Dolton	Validated Successfu...			mdolton@student.com
☒	   	1323...	ABC Section 2B	Test BW	Validated Successfu...			bw@mail.com
☐	   	1323...	ABC Section 2B	Karl CisTest	Discarded			kcistest@win.com
☒	   	1323...	ABC Section 2B	Matt Cauthon	Validated Successfu...			MC@mail.com
☐	   	1324...	ABC Section 2B		Validated With Errors	Learner Not Found		PeterMStudent

Some common validation errors include:

Validation Error	How to Address
Class Name is not unique	Class names must be unique within an organization. Edit the name of the new class or go to Class Management and edit the name of the existing class.
Archive date must be the same within a class	One or more learners in this class have different archive dates. Edit the file so that everyone in your class shares the same archive date.
Reset date must be the same within a class	One or more learners in this class have different reset dates. Edit the file so that everyone in your class shares the same reset date.
Facilitator not found	The facilitator listed for your class is either not enrolled as a facilitator in your organization or is enrolled with a different Username or ID number. Go to User Administration to verify the facilitator's account details. Note: Administrator accounts cannot be added to specific classes because they can see all classes at their organization by default.
Learner not found	The learner listed for your class is either not enrolled as a learner in your organization or is enrolled with a different Username or ID number. Go to User Administration to verify the learner's account details. Note: If you attempt to enroll the learner and receive a message that the learner already exists in the system, call WIN Support as they may require a transfer.

Once all validations are complete and passed, and all records submitted, click **Import Pending Records**.

Previous

Next

Import Pending Records

1. Class validation
2. Additional facilitator validation (optional)
3. Learner validation

Each record below must be either submitted or discarded to proceed to the next step. You may edit any records before choosing to submit them if desired.

☐
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☐

Search criteria...

☐	Row Actions	ID	Class	Matched Learner	Status	Errors	Validation I...	Mapped Locator Value
☐		1323...	ABC Section 2B	Monica Dolton	Pending Import		①	mdolton@student.com
☐		1323...	ABC Section 2B	Test BW	Pending Import		①	bw@mail.com
☐		1323...	ABC Section 2B	Karl CisTest	Discarded		①	kcistest@win.com
☐		1323...	ABC Section 2B	Matt Cauthon	Pending Import		①	MC@mail.com
☐		1324...	ABC Section 2B		Discarded	Learner Not Found	①	PeterMStudent

Review the confirmation screen and if accurate, **click Continue**.

The class roster has been created and can be accessed and managed through Class Management.