

DETAILED INSTRUCTIONS FOR IMPORTING EDUCATORS

A Guide to Adding and Updating Educators to the Learning Ally Educator Portal

Adding and updating educators from a file is the most efficient way to make sure that your school or district gets the most out of the Learning Ally Audiobook Solution.

The Roster Import process happens in 4 phases: **Validate**, **Analyze**, **Select**, and **Confirm**. The Roster Import Tool maintains your proposed new educators and updates to existing educators in a temporary database. The changes you propose in the file you import are not complete until you receive a confirmation email.

To begin, visit Manage Educators in the Learning Ally Educator Portal and select Add or Update Educators from File. Then, follow the instructions below to ensure a successful roster import process!

VALIDATE

Prepare Your File

1. Download the Learning Ally School Org ID list.
2. Download the Learning Ally Educator Template.
3. Manually add your educator information or cut and paste it from an export of your own SIS, LMS, or other source file. If you configure an export from your SIS to match the template be sure to match exactly to ensure a successful import. To match educators to schools you must use the Learning Ally School Org ID provided in the downloadable link.
4. Ensure your file is uncorrupted and a valid file type. Acceptable file types include Comma Separated Values (.csv) or Excel (.xls or .xlsx)
5. To ensure the validity of the data, please follow these instructions when adding or editing data:
 - a. **Do not** change the column headers.
 - b. **Do not** delete any of the columns. If you are not providing data for an optional column, leave the column blank.
 - c. Check your data for duplicates.
 - d. If you are adding educators, and the same educator works in multiple schools, the educator must be listed with each school on a separate row. All other information including job title and role must be the same in each row.
6. To update existing educators:
 - a. Navigate to either "Manage Educators" to export the list of existing educators.
 - b. Passwords will not appear in the export, but can be updated. If no information is updated, they will remain the same.
 - c. As long as you have the Learning Ally Key in the export, you can edit any field (Except the Learning Ally Key). You can add new educators in the same file as updates.

DETAILED INSTRUCTIONS FOR IMPORTING EDUCATORS

Provide the following educator data:

EDUCATOR DATA	DEFINITION	RULES
First Name*	Educator's first name	50 character maximum
Last Name*	Educator's last name	50 character maximum
School Name*	Full name of school	Educators may be associated with more than one school. Add a new row for each school. All other information including job title and role must be the same for each row.
Learning Ally School Org ID*	Learning Ally Org Identifier	Obtain the Learning Ally School Org ID from the download link
Educator Email Address*	Email address that will be sent Learning Ally Audiobook Solution credentials	250 character maximum
Username*	Identification used by the educator to access the Learning Ally Audiobook Solution	<ul style="list-style-type: none"> • 5 character minimum • 100 character maximum • Do not use special characters (',#,&,<," etc.) • Do not use spaces • Must be unique • Email can be used • Letters or numbers can be used • Usernames can be added for new educators. • Usernames for existing educators can be edited as long as your file has the unedited Learning Ally Key for each educator. (Export a list of your existing educators from the "Manage Educators" page to obtain the Learning Ally Key).
Password	Combination of characters used to identify the educator to access the Learning Ally Audiobook Solution	<ul style="list-style-type: none"> • Minimum of 6 characters, case sensitive. • Passwords are not required for educators. • If not provided, they will be auto-generated and sent to educators. • Educators can change passwords upon log-in. • Passwords will not be displayed for existing educators exported for update. • New passwords may be added to each educator record. • Passwords may be the same or different for each educator. • If no password information is included in the update, passwords will remain the same.
Educator Phone Number	Educator's contact phone number	10 digit number, can include separators or not

DETAILED INSTRUCTIONS FOR IMPORTING EDUCATORS

EDUCATOR DATA	DEFINITION	RULES
Educator Job Title*	Educator's job title	<p>Please select the closest acceptable value:</p> <ul style="list-style-type: none"> • General Educator • Special Educator • Director of Special Education • Director of Curriculum • Director of Disability Services • Director of Technology • Learning/Reading Specialist • Librarian • Principal/Vice or Asst. Principal • Speech and Language Pathologist • School Psychologist • VI Educator • Other
Learning Ally Role*	<p>Educator's role within the Learning Ally Educator Portal</p> <p>Administrator: Can add educators & students, determine eligibility for students, monitor educators, and monitor progress of educators & students for one or multiple schools.</p> <p>Data Manager: Can import multiple educators and students through a roster import</p> <p>Instructor: Can add students, determine eligibility, and assign books.</p>	<p>Acceptable values:</p> <ul style="list-style-type: none"> • Administrator • Instructor • Read Only Instructor <p>Each educator may only have one role.</p> <p>(e.g. Administrator; Instructor; Read-Only Instructor)</p>
Data Manager (Y/N)	Data Manager: Can import multiple educators and students through a roster import	<p>Enter the value: Y for any educator who needs the secondary role of data manager</p> <p>Enter the value: N for any educator who does not need the secondary role of Data Manager</p> <p>If no value is provided, Data Manager role will not be provided.</p>

*Required Field

Import Data to Validate File

1. Drag and drop or select your prepared file and select Import.
2. In order to be validated, your file must be a readable csv.

DETAILED INSTRUCTIONS FOR IMPORTING EDUCATORS

ANALYZE

1. The Learning Ally Roster Import tool will check your file against the database to determine which records will be added as new educators and which will be updated.
2. Educators may be associated with more than one school. You will receive a duplicate error if educator data such as role or job title is different when trying to associate the educator with more than one school.
3. The analysis phase is checking for the following:

A. CHECKING THE FILE	B. CHECKING THE LEARNING ALLY DATABASE (LADB)
<ul style="list-style-type: none">• Readable file (.csv, .xls or .xlsx)• Required Column Missing: First Name• Required Column Missing: Last Name• Required Column Missing: School Name• Required Column Missing: Learning Ally School Org ID• Required Column Missing: Username• Required Column Missing: Password• Required Column Missing: Learning Ally Role• Required Column Missing: Educator Job Title• Required Column Missing: Educator Phone Number	<ul style="list-style-type: none">• Required Field Missing: First Name• Required Field Missing: School Name• Required Field Missing: Learning Ally School Org ID• Required Field Missing: Username• Required Field Missing: Learning Ally Role• Required Field Missing: Educator Job Title• Username(s) with Leading/Trailing Space• Invalid Learning Ally Role• Invalid Username• Invalid Email Address• Password(s) must be a minimum of 6 characters• Duplicate Entry• Duplicate Username within the file• Duplicate User in Your Account• Duplicate User in the Learning Ally System• Invalid Learning Ally School Org ID• School(s) not in Your Account

DETAILED INSTRUCTIONS FOR IMPORTING EDUCATORS

SELECT DATA

1. Once the file has been validated and checked for errors, review your data.
2. Add/Update the educator records that do not have errors by selecting educators individually or through "Select All". Add specific groups of educators by filtering your data. If your data is filtered, "Select All" will select all the data within the parameters of the filter.



New educator that will be added.



Existing educator that will be updated.

CONFIRM DATA

1. After selecting the educators, select "Confirm Selection".
2. You will receive a confirmation email once the educators have been successfully added/updated.
3. If your data has errors, they will be detailed so that you can correct them in your file and re-import.