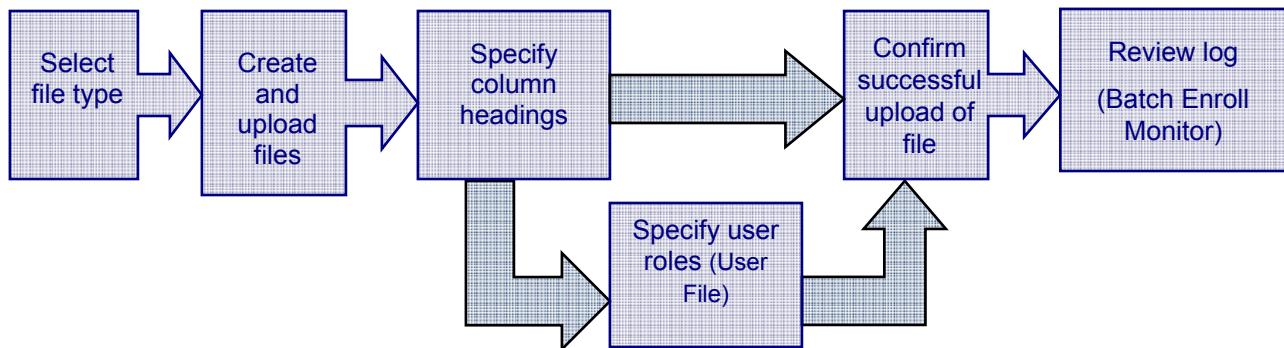


Process Overview

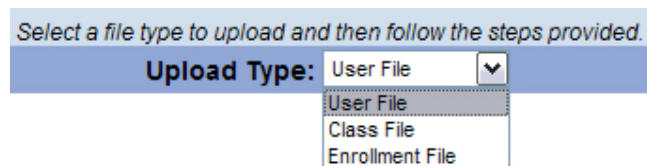
The batch enroll process should be used when you want to create—all at one time—a large number of new users or multiple classes or when you want to enroll learners in multiple classes in the system. This situation would most likely occur at the beginning of the school year.

The diagram shows the steps in the batch enroll process. These steps *must* be completed in the order shown to complete an error-free upload process.



Guidelines for Upload File

The **Upload Type** drop list enables you to select and upload files based on user, class, or learner enrollment.



User File (Administrators, Teachers, and Learners)

- Verify that you have included the required data: **School Name or ID, First Name, Last Name, PLATO Name, Primary Role, Password, and Grade** (for Teachers and Learners).
- Suggested optional data to include:
 - **SIS ID Column (column F)** – Student identification number for the district; this information helps to track students from year to year.
 - **Secondary Role (column H)** – Users may have more than one role while using the same login information. This data helps with viewing how the other roles will see any implemented changes.
- The learner expiration date must be *earlier* than the account expiration date.
- Punctuation, such as commas or hyphens in names, should be omitted.



Quick Tip

- For **Password** (Column I), you can include a generic login for teachers and students.
- For security reasons, request that teachers and learners change this password immediately.

- If demographic data is loaded, find the correct data formats by accessing the Batch Enroll Knowledge Base article on the PLATO support site at this link: <http://support.plato.com/kb/tip.asp?psid=1528>
- The grade level is a required field for teachers and learners, and it must be numeric (kindergarten = 0). The grade level is optional for administrators.
- The graduation year must be *the same as* or *later than* the current year.
- Click the **View School List** button on the Upload File page to see the list of school names in your district for your account. Use the school names on this list. If you use school names not on the list, you will see an error message, and the users will not be uploaded.

View School ID List	
District: Washington County District	
School Name	School ID
Kennedy Elementary School	302
Washington High School	303

Class File

- Verify that you have included the required data: **District, School ID, PLATO Name of Teacher, Class Name, and Class Expiration Date.**
- Suggested optional data to include:
 - **Grade** – Specifying the students' grade assists in identifying and grouping.
 - **Class Description**
- Click the **View School List** button on the Upload File page to see the list of school names in your district for your account (see above image). Use the school names on this list. If you use school names not on the list, you will see an error message, and the users will not be uploaded.

Enrollment File

- Verify that you have included the required data: **PLATO Name of Learners, Class ID, School Name ID, and Grade.**
- Click the **View Class ID List** button on the Upload File page to see the list of class IDs in your district for your account. Use the class IDs (*not* names) on this list. If you use class IDs not on the list, you will see an error message and the users will not be uploaded.

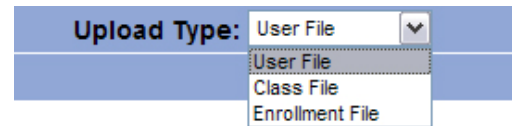
View Class ID List	
District: Washington County District	
School: Kennedy Elementary School	
Kennedy Elementary School	
Class Name	Class ID
Third Grade	ccd0cf3b-fb0e-4585-a923-117bb00a9ccc
First Grade	a2f64536-47eb-4c2e-9c7a-580759b37f3c
Second Grade	e44aa7aa-4ee0-4a9c-818a-616b0eb0f49e
Chinese Immersion Kindergarten	a0ad319e-f5a8-49ce-9b01-87638617bbc9

Steps in the Process

To start the process, select **Batch Enroll** from the **Account Administration** menu. The screen samples here are from **Upload Type: User File**, but the same process is followed for **Class** and **Enrollment** files.

1. Select File Type

From the Upload Type drop list, select a file type. If you'd like to enroll multiple users at a time, choose User File. To create multiple classes at the same time, select Class File. Selecting Enrollment File will enable you to associate learners with classes.

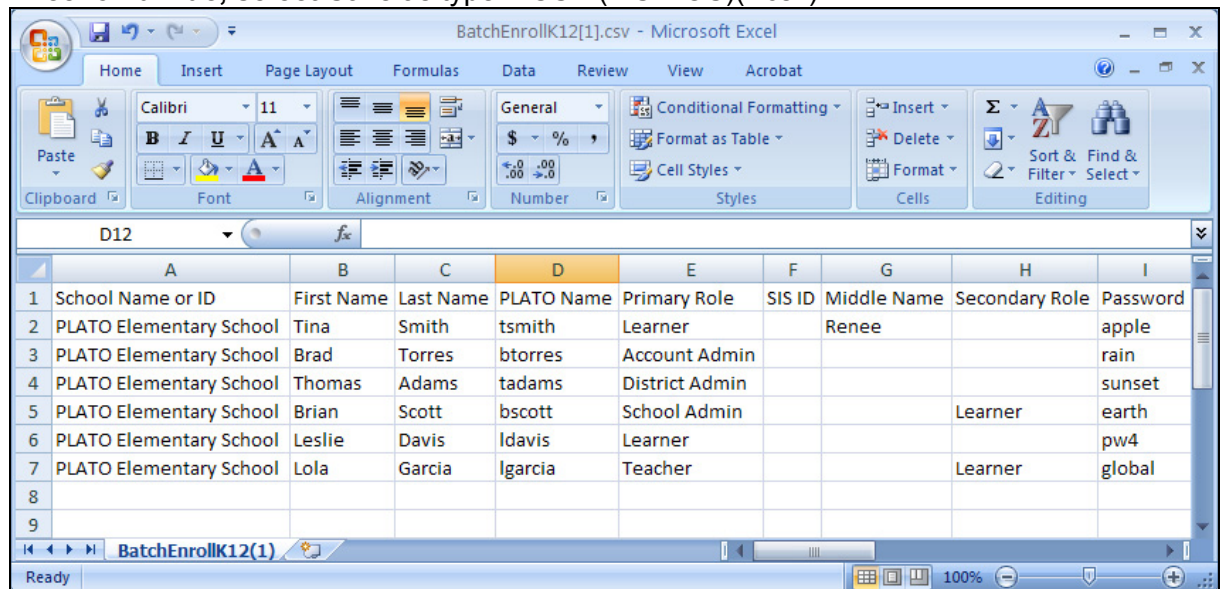


2. Create and Upload Files

Follow these steps to create or edit the sample files available in Batch Enroll.

- A. Click **Download Sample File** (.csv), edit all required fields with your school's data, and **Save** the file. Note which fields are required and which are optional and choose fields for your data accordingly.

Note: To successfully upload the file, you must save the file with the correct file type. In Excel, select File > Save As > Save as type, select CSV (windows)(* .csv). In Excel on a Mac, select Save as type > CSV (MS-DOS)(* .csv).



- B. Click **Browse** back on the Batch Enroll screen, and upload the file you have created.
- C. Select a district from the dropdown list.
- D. Click **Continue** and advance to the next step in the process.

3. Specify Column Headings

Are you sure you want to ignore first row (column headers) in uploaded file? Yes No

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
* School Name or ID	* First Name	* Last Name	* PLATO Name	* Primary Role	SIS ID
School Name or ID	First Name	Last Name	PLATO Name	Primary Role	SIS ID
PLATO Elementary School	Tina	Smith	tsmith	Learner	
PLATO Elementary School	Brad	Torres	btorres	Account Admin	
PLATO Elementary School	Thomas	Adams	tadams	District Admin	
PLATO Elementary School	Brian	Scott	bscott	School Admin	
PLATO Elementary School	Leslie	Davis	ldavis	Learner	
PLATO Elementary School	Lola	Garcia	lgarcia	Teacher	

By default, the system will use the data in the first row of your .csv file to determine column headings for the data. Please confirm that these column headings match the data listed for that field, and then click **Continue**.

4. Specify User Roles (applicable to User File only)

When uploading a **User file**, you will be asked to specify PLATO roles for your users. (When uploading a Class or an Enrollment file type, the **Specify User Roles** page does not appear.)

Assign a PLATO role to each role that will be uploaded in your .csv file and click **Continue**.

Note: See the *PLE Administrator Quick Start Guide* to review PLATO role privileges.

5. Confirm Successful Upload of File

Click **Finished** to confirm that you have successfully uploaded the .csv file. After the upload process is complete, you are automatically taken to the Batch Enroll Monitor screen.

6. Review Log (Batch Enroll Monitor)

On the Batch Enroll Monitor screen, click **Download log** to review the file for any errors.

Note: The status will show as either receiving, processing, or complete. When the status is complete, it is recommended that you review the log for errors.

Batch Enroll Status					
File Name	Upload Type	Start Date	Start Time	Elapsed Time	Status
BatchEnroll.csv	User	09/04/08	2:29PM	2:42PM	Complete

[DOWNLOAD LOG](#)