samegoal

Bulk Loader

SameGoal provides administrative users with bulk import functionality. To use, log in as an administrative user and visit **Settings > Bulk Loader**.

- Students
- Guardians
- Users
- User Roles
- Medicaid IDs
- Absences
- Student Teams

Students

- Students must be provided in the students.csv file format.
- Students must be loaded simultaneously with guardians.
- This utility adds or updates each student included in the file.
- This utility cannot be used to delete students.
    - Students omitted in a subsequent file load will not be deleted from the database.
    - Students may be deleted in the web interface.

Guardians

- Guardians must be provided in the guardians.csv file format.
- Guardians must be loaded simultaneously with students.
- This utility expects the **Student Id** for each guardian record to match the **Student Id** of a student included in **students.csv**. Guardian records that reference a **Student Id** not included in **students.csv** will not be loaded.
- When loading students and guardians, this utility assumes the two files represent the most up-to-date student/parent demographics for each student. If guardian(s) exist in the database for a given student which are not included in the load, these guardians will be deleted.

Users

- Users must be provided in the users.csv file format.
- This utility adds, updates or deletes each user, along with their user roles and buildings, included in the file.
    - Users not assigned a user role will have a default permission of **None** for all forms and a max permission of **Owner** for all forms in all buildings available in the district.
    - Users omitted in a subsequent file load will not be deleted from the database.
    - To delete a user, specify an explicit **Deleted** column or use the web interface.

User Roles

- User roles must be provided in the user_roles.csv file format.
- This utility adds or updates each user role form permission record included in the file.
- This utility cannot be used to delete form permissions from a user group, or user roles themselves.
    - User role form permissions omitted in a subsequent file load will not be deleted.
    - User roles and user role form permissions may be deleted and undeleted in the web interface.

Medicaid IDs

- This utility expects a 2-column CSV with columns **Student ID**, **Medicaid ID**.
- Bulk loaded Medicaid IDs are written to each student's **Details** tab.
- Once present on a student's **Details** tab, this Medicaid ID is available for copy/insert into documents where relevant.

Absences

- Absences must be provided in the absences.csv file format.
- Bulk loaded absence dates and comments are written to each student's **Details** tab, in the **Start** and **Comments** column under **Student Absences**, respectively.

Student Teams

- Student Teams must be provided in the student_teams.csv file format.
- This utility is available with the PRO edition of SameGoal.
- Bulk loaded student team members are written to each student's **Team** tab.
- When bulk loading student team members, there will be a warning for each team member that does not have any permission in the student's building. If there are any errors for a student, that student's team will not be updated.
- Once present on a student's **Team** tab, student team members will be prompted to acknowledge receipt of specified documents upon completion.