samegoal

# Bulk Import PDFs


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## Overview

During implementation, PDFs from your prior system may be imported into SameGoal, **giving staff access to historic documents authored in your previous system even after converting to SameGoal.**

Imported PDFs in SameGoal appear as "Upload" documents under the student. The filename appears as the comments, and the uploaded PDF is attached.

Importing PDFs does not modify program participation, deadlines or reports. In order to load key program data for each student during implementation, use the Data Loader tool in addition to the PDF Import tool.

The PDF Import tool associates an unlimited number of documents per student going back arbitrarily many years. Documents are associated by attaching them to existing student records in SameGoal. Because this tool does not create student records, either run a demographics integration or use the Bulk Loader tool to create student records prior to import.

## Extract PDFs from your prior system

**In order to import PDFs into SameGoal, you must first extract the PDFs from your prior system.** For most special programs vendors, you'll need to submit a request to let the vendor know you are planning to transition from their system and request your data be made available as PDFs. Many vendors provide this service at no cost or for a marginal fee.

Each special programs vendor has a slightly different process, but SameGoal has helped districts transition from a wide variety of systems. Check with your implementation coordinator regarding best practices districts have used previously for transitioning from your particular vendor.

## PDF directory and naming conventions

PDFs may be provided by your prior vendor using nearly any naming convention, so long as student ID (the student's Local ID used in your student information system, not their State Reporting ID) is included in each filepath in a consistent location. At the point the files are uploaded, the user is asked to identify the location of the student ID in one uploaded file as an example, then the import will apply that convention to all files uploaded in the given PDF import. For example, either of the following would work:

- **123456_Smith_Bob_IEP_2026-01-28.pdf**
- **123456/Smith_Bob_IEP_2026-01-28.pdf**

Tip Prior to running a PDF import, users will be required to place all PDFs in a top-level parent directory (e.g. **applegrove.org/...**) matching their district domain in SameGoal. If the top-level directory name does not match the district domain, the import will fail. This is a safeguard to prevent accidental PDF import into the wrong environment, particularly for local support partners that assist many districts. When initiating a new import, the district domain will be listed at the top in the blue bar as well as in the **Stage 1: Configure and Upload** instructions on the screen.

## Import PDFs into SameGoal

**The PDF Import Tool bulk imports PDFs in 2 stages.** First, files are uploaded into SameGoal by an administrator, then they are automatically associated with the corresponding student.

### Steps *To bulk import PDFs:*

1. While logged in as an administrative user, visit **Settings** > **PDF Import**.
2. Click the **New PDF Import** button.
3. Drag and drop a folder from your local computer into the upload field.
    - Tip The top-level directory name must match your SameGoal district domain exactly as shown in the blue bar at the top of the page (see PDF directory and naming conventions).
4. Select the portion of the example filepath with the Student ID. If your selection contains information other than the Student ID, choose the separator, then select the Student ID from the resulting (separated) options. If the Student ID is not in the filepath, select "The Student ID is not present"[1].
5. Once you have configured the import, click the **Preview** button to preview the success rate of the import.
6. If needed, make changes to your directory or import configurations.
7. Once you are satisfied with the preview, click **Continue** and stay on the page during this stage of the import **(Stage 1: Upload)**. How long this step takes will depend on the size of the upload and your internet speed.
8. A summary of the number of uploaded documents for processing and any upload errors will appear on screen after Stage 1 is complete.
9. Once PDFs have been uploaded to SameGoal servers, they are automatically inspected and associated with the corresponding student in SameGoal when possible **(Stage 2: Associate)**. Because this phase happens server-side, you may close the browser tab, work on something else in SameGoal or even log out while PDFs are being associated.
10. Once Stage 2 is complete, you will receive a notification email with a link to review results. Follow this link to see a summary report to review.

[1] *Note: This is not a recommended import configuration, as it typically results in a lower association rate than importing based on Student ID.* For "Alternate upload options", you can either select:

- *Write a regular expression:* Use if student first and last name appear in a consistent location in filepaths. We recommend you contact SameGoal support for help with this. Example regex
- *Let the system guess:* The system will scan the text content of each PDF to search for student information.

Tip If you find PDFs that should have been associated but were not, address any issues and re-run the PDF Import tool. This can be done as many times as necessary to get the desired results. PDFs that have already been associated will not be re-associated.

## Reviewing an import

After the PDF Import tool is run, review the report to ensure all of the desired PDFs were associated to the correct student record. If you find PDFs that should have been associated but were not, address any issues and re-run the PDF Import tool. This can be done as many times as necessary to get the desired results. You can also manually attach PDFs if you wish.

**Steps** *To view the results of a PDF import:*

1. Log in to SameGoal as an administrative user.
2. Go to **Settings** > **PDF Import**.
3. Select the import summary you'd like to view.
    - Summaries are sorted by the date and time the import tool was run.
4. Use the **Result** and **Note** columns to review. You may filter on these columns in-app if you're on the Plus or Pro edition of SameGoal. Otherwise, you may download the report and filter the results locally.
    - **Result**: This column shows whether or not the document was associated. Potential results include:
        - **Associated**: The PDF has been associated to the student listed in the Student column.
        - **Previously Associated / Duplicate**: The PDF was already associated with a student in a previous import.
        - **Not Associated**: The PDF was not associated and is less than 3 years old.
        - **Not Associated (older than 3 fiscal years)**: The PDF was not associated and is more than 3 years old. The document's age is not the reason it did not associate. However, this note is included since if a PDF is older than 3 fiscal years, it is likely less relevant to current document and might not need to be reimported.
    - **Note**: If the document was not associated, this column lists the reason why. (See the common issues below.)

Tip SameGoal does not store PDFs that were not associated with a student record. It is the responsibility of the district to save and store these documents.

## Common issues

The most common reasons a document is not associated to a student record include:

- **Unsupported file type:** Only PDFs are imported into SameGoal. No other file types (e.g.: doc, docx, jpeg, etc.) can be associated. If you wish to import a different file-type, you must first convert it to a PDF prior to uploading it to the SameGoal PDF Import tool.
- **File is too large:** SameGoal only associates PDFs that are allowed by your current tier.
    - SameGoal Standard - 50MB
    - SameGoal Plus - 100MB
    - SameGoal Pro - 150MB
- **Student not in SameGoal:** The student a PDF should be associated with is not currently in SameGoal (e.g. graduated, transferred, etc. prior to implementation).
- **Missing student demographics:** Each PDF must meet at least one of the criteria below:
    - Have a filepath that contains the student ID.
    - Have a filepath that contains the student's first name and last name (Note: a regular expression needs to be written in this case and we strongly recommend you contact SameGoal support for assistance).
    - Contain both the (a) student ID and (b) last name in the PDF itself such that text extraction can be used (Note: text extraction cannot be used on image only PDFs).
    - Be contained in a per-student directory that that includes at least one other document that is able to be successfully associated with a student.
- **The student ID is in the wrong position compared to how the import was configured:** When the PDF import is configured, you tell the system where in the filepath the student ID is located. If a given filepath contains the student ID in a different position, it will fail to import. For example:
    - If the import is configured based on a filepath of **<domain>/<firstname>_<lastname>_<studentID>.pdf**, the system will look for the student ID in the third position of the filename.
    - But if you have a file with a filepath of **<domain>/<lastname>_<studentID>.pdf**, the student ID is located in the second position of the filename. Thus, it does not match the import configuration.

- In general, we recommend that the student ID is located in a directory name or first in a filename, as students can frequently have first or last names that contain multiple words. When the student ID comes after these data elements in the file, the student ID is frequently not in a consistent location in the filepath (resulting in lower PDF association rate).