samegoal

Generic CSV API

This generic CSV API allows districts to import data into SameGoal through SFTP-based CSV file upload integrations. These file layouts are also used for bulk data load as needed.

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students.csv

[download spec]

Tip We recommend you include all currently enrolled students in the integration. This allows staff to start evaluation documentation immediately for students when they are initially referred.

- Complete one row for each student you wish to be added.
- Fields - unless otherwise specified, all fields are optional, may contain letters, numbers and symbols, and are of unlimited length.
  - *Student Id* [required, key]. Student Id number from your student information system (e.g.: 555555). This field can contain letters and numbers, but is limited to 20 characters. Each Student Id number must be unique to your district.
  - *Last Name* [required]. Student last name.
  - *Middle Name*. Student middle name.
  - *First Name* [required]. Student first name.

- *Date of Birth* [required]. Student date of birth. Must be in one of the following formats: MM/DD/YYYY, MM-DD-YYYY, YYYY/MM/DD, YYYY-MM-DD
- *Gender* [required]. Must be one of the following values: M, F, m, f, male, female, Male, Female.
- *District Enrollment* [required]. Student enrollment status. Must be one of the following values: PRE_ENROLLED, ENROLLED, TRANSFERRED, WITHDREW, DROPPED_OUT, GRADUATED, INACTIVE, HISTORICAL_IDLE.
- *Grade*. Student grade.
- *Address*. Student address.
- *City*. Student city.
- *State*. Student state.
- *Zip*. Student zip.
- *Race*. Student race.
- *District of Residence*. Student district of residence.
- *County of Residence*. Student county of residence.
- *District of Service*. Student district of service.
- *Student Reporting Id*. Student Id used in state reporting.
- *Building* [required]. School name, such as Forest Middle School.
- *Building Reporting Id* [required]. School building Id used in state reporting.
- *SIS Internal ID*. Student information system internal identifier, if applicable.

Tip If you are using the students.csv to bulk load students who are not yet in the Student Information System, the building name must **EXACTLY** match the name listed under **Settings** > **Buildings**.

guardians.csv

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Tip guardians.csv is not required. However, forms throughout the program are prefilled with student and parent/guardian demographics whenever possible. Including guardians.csv saves staff time.

- Complete one row for each parent/guardian you wish to be added. If no parent/guardian information exists for a given student, this file may contain zero rows for this student.
- Fields - unless otherwise specified, all fields are optional, may contain letters, numbers and symbols, and are of unlimited length.
    - *Student Id* [required, key]. Student Id number from your student information system (e.g.: 555555) that corresponds to child of this parent/guardian.
    - *Last Name* [required]. Parent/guardian last name.
    - *First Name* [required]. Parent/guardian first name.
    - *Type* [required]. Parent/guardian type. This field must be 1 or M for the Mother, 2 or F for the Father, or 3 or G for the Guardian.
    - *Address*. Parent/guardian address.
    - *City*. Parent/guardian city.
    - *State*. Parent/guardian state.
    - *Zip*. Parent/guardian zip.
    - *Home Phone*. Parent/guardian home phone.
    - *Work Phone*. Parent/guardian work phone.
    - *Cell Phone*. Parent/guardian cell phone.
    - *Email*. Parent/guardian email.

users.csv

[download spec]

- Complete one row for each user you wish to be added.
- Fields - unless otherwise specified, all fields are optional, may contain letters, numbers and symbols, and are of unlimited length.
    - *Last Name* [required]. User last name.
    - *First Name* [required]. User first name.
    - *Email* [required, key]. User email. Most commonly district supplied.
    - *LDAP Username*. User LDAP/Active Directory username. Required only when:
        - LDAP/Active Directory is enabled for the environment, and
        - The user is in LDAP, and
        - The LDAP username is different than the user's email username (e.g. LDAP username is "bobsmith", and email username is "bsmith")
    - *Force Local Authentication*. Required when:
        - LDAP/Active Directory is enabled for the environment, and
        - The user is not in LDAP and/or should be authenticated without querying the LDAP/Active Directory server (eg instead use a password stored in SameGoal).
            - If specified, must be one of the following values: "Yes", "Y", "yes", "y", "X", "x", "1", "No", "no", "N", "n", "0".
    - *Roles*. Exact name of role(s) to assign user to. This must match a user role entered in SameGoal by an administrator, or a **Role** included in user_roles.csv if including this file in the integration.
        - For administrative users, set this column value to "Admin". Do not specify any buildings in the **Buildings** column for this user; admin users have access to all buildings.
        - 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.
        - Tip Sometimes districts wish to set a **default** role rather than an explicit role. This is helpful if a district plans to create accounts in SameGoal for many and/or all staff districtwide. By setting a default role, districts can automatically create/delete user accounts and specify any user role as the default. If/when an administrative user changes/promotes this user to have a different user role, the default user role in this file will no longer apply/not override the manual setting. To

change this column to be interpreted as a default (rather than explicit) role, change the column name from **Roles** to **~Roles** (prefix with a tilde).

- *Buildings*. Comma separated list of buildings this user should have for the specified user role. Building name must exactly match a building listed in your administrative account, which can be found by visiting **Settings** > **Buildings**.
- *OIDC Subject ID*. User OIDC Subject Identifier assigned by the OIDC identity provider (IdP). Required only when the district uses OIDC and wants to proactively assign the Subject Identifier (as opposed to lazily on first user sign in). If the empty string is passed (or the column is missing) existing OIDC Subject IDs will not be removed from SameGoal. In the rare case that the district wants to remove existing values use **<empty>**.
- *Deleted*. Required only when removing accounts currently in the system.
  - If specified, must be one of the following values: "Yes", "Y", "yes", "y", "X", "x", "1", "No", "no", "N", "n", "0".

Tip If a user has multiple roles, separate them by semicolon and separate the buildings that are associated with the role respectively by semicolon. Roles with multiple buildings should be comma separated. An example for a user who is a Special Education Teacher at North Elementary, a Related Service Provider at North Elementary, South Elementary, East Elementary, and West Elementary, and Literacy Teacher at South Elementary would have the below for Role and Buildings:

- **Roles** = Special Education Teacher;Related Service Provider;Literacy Teacher
- **Buildings** = North Elementary;North Elementary,South Elementary,East Elementary,West Elementary;South Elementary

Tip Because **Roles** and **Buildings** columns can contain a special character (comma), they must be enclosed in double quotes. See CSV file generation requirements

user_roles.csv

[download spec]

- Complete one row for each user role form permission. For example, for a user role that assigns permissions for four (4) forms, this file should contain 4 rows, one for each form permission.
- Fields - all fields may contain letters, numbers and symbols, and are of unlimited length.
    - *Role* [required, key]. Name of user role.
    - *Form* [required]. Exact name of form to assign permissions to. This can be found by visiting a document using this form in the program.
    - *Default Permission* [required]. The default permission users in this user group should have for this form. Valid options include "none", "view", "edit", "owner".
    - *Max Permission* [required]. The maximum permission users in this user group should have for this form. Valid options include "none", "view", "edit", "owner".

Tip The values for Default and Max permission must be typed in all lower case.

absences.csv

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Tip We recommend districts include *full-day*, *non-funded* absences only. Student absence dates are used to adjust documentation deadlines as relevant, and are displayed on each student's *Details* tab.

Tip When generating this file, choose a "cutover" date. Only include absences on or after this date in the file.

Tip In order for absences included in this file to be loaded into SameGoal, this "cutover" date must be entered in the SameGoal web application. When logged in with an administrative account, visit **Settings** (left menu) > **District Information**. Under the STUDENT INFORMATION SYSTEMS INTEGRATION heading, locate **Absences**. Click the *add Cutover Date* button and add this cutover date. If no cutover date is entered in the web interface, no absence information will be loaded.

- Complete one row for each absence.
- Fields - unless otherwise specified, all fields are optional, may contain letters, numbers and symbols, and are of unlimited length.
    - *Student Id* [required, key]. Student Id number from your student information system (e.g.: 555555). This field can contain letters and numbers, but is limited to 20 characters. Each Student Id number must be unique to your district.
    - *Date* [required]. Date of full-day, non-funded absence.
    - *Comments*. Optional; displayed in the web interface but not otherwise used. Can be a district-specific code or note about the type of absence.

student_teams.csv

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- Complete one row for each team member. For example, if there are 4 student team members for a given student, this file should contain 4 rows for the student, one for each team member.
- Fields
    - *Student Id* [required, key]. Student Id number from your student information system (e.g.: 555555). This field can contain letters and numbers, but is limited to 20 characters. Each Student Id number must be unique to your district.
    - *Team Member Email*. The user's email address or username (if the email domain matches the district domain).

Tip Students included in the file will have their entire student team overwritten by the contents of the file. If a student is included in the file, any team member not present in the file will be removed from the student's team.

Tip If all current team members should be removed from a student's team, the file should include one line for the student including their Id and a blank value for the Team Member Email.

CSV file generation requirements

See the IETF CSV spec, particularly section "2. Definition of the CSV Format" for tips on generating valid CSV files. In short:

- All fields may be OPTIONALLY enclosed in double quotes.
- All fields MUST be enclosed in double quotes if they contain a special character (comma, newline, or double quote).
- Double quote characters that are part of the value of a field must be escaped by adding another double quote character immediately before the double quote. For example, the value *will take place at "The Wildcats" computer room* is escaped to *will take place at ""The Wildcats"" computer room*.
- A good sanity check on the format of your files is to open them in Excel and ensure the columns line up as you intend. If Excel can read it, we should be able to read it.
- Note that some fields may contain non-printable characters (depending on your data source). This is likely undesired and we recommend removing values outside the ASCII "printable characters" range. This is not strictly necessary, but it is strongly encouraged as it can help to keep the data imported clean and looking as intended.

Technical details

- SFTP-based CSV file upload is safe to run multiple times. In the event that you upload the same files multiple times, all successive runs will have no effect.
- You may upload CSV files as many times per day as you like. All uploads are processed in chronological order.
- If you have a "bad" upload that you do not want processed, simply connect to your SFTP account and delete the epoch directory.
- If no upload occurs for a given day(s), nothing bad happens. All information will be left in the system and no update will be performed.
- After each epoch directory is processed, it is moved to /upload-processed/ for approximately 30 days. Data is retained for debugging purposes but can be garbage collected at any time.
- Leading and trailing whitespace is removed from all fields.
- Add/update policy:
    - If the key for a given row IS NOT in the database, the information in the row will be **added**.
    - If the key for a given row IS in the database, the information in the database for the row will be **updated**.
    - If a key is in the database, but not in the integration file, that information **is not removed** from the database. No information can be deleted from the database via integration. This minimizes the risk of accidental deletion of information.
    - Integrations are "transactional". Either all rows or no rows are processed.