

## ENHANCED BATCH ACCOUNT CREATION

The School Finance Act of 2009 specified that 6th grade students must have a CollegelnColorado.org account, and that each district in Colorado must provide access to and assistance in student development and maintenance of their Individual Career and Academic Plan (ICAP). College In Colorado is working to greatly reduce any additional burden these requirements may impose by providing you with the best tools and features possible on CollegelnColorado.org. This document describes the recently enhanced **electronic batch process** to create CollegelnColorado.org accounts (portfolios) using a file created from your Student Information System (SIS) or other data storage system.

This feature is available, free-of-charge, to K-12 education professionals, postsecondary school advisors and workforce center advisors (or their IT/support staff members), through a Professional Center (<http://procenter.collegeincolorado.org>) account created with the site-specific Professional Account Access Key (PAAK) or Administrator code (AC). The site administrator may suppress PAAK account access to this feature.

While the College In Colorado Professional Center currently includes a feature in the “Students and Groups” section that allows professionals to create student accounts (portfolios) in a batch, this process has been greatly enhanced with a number of important features including:

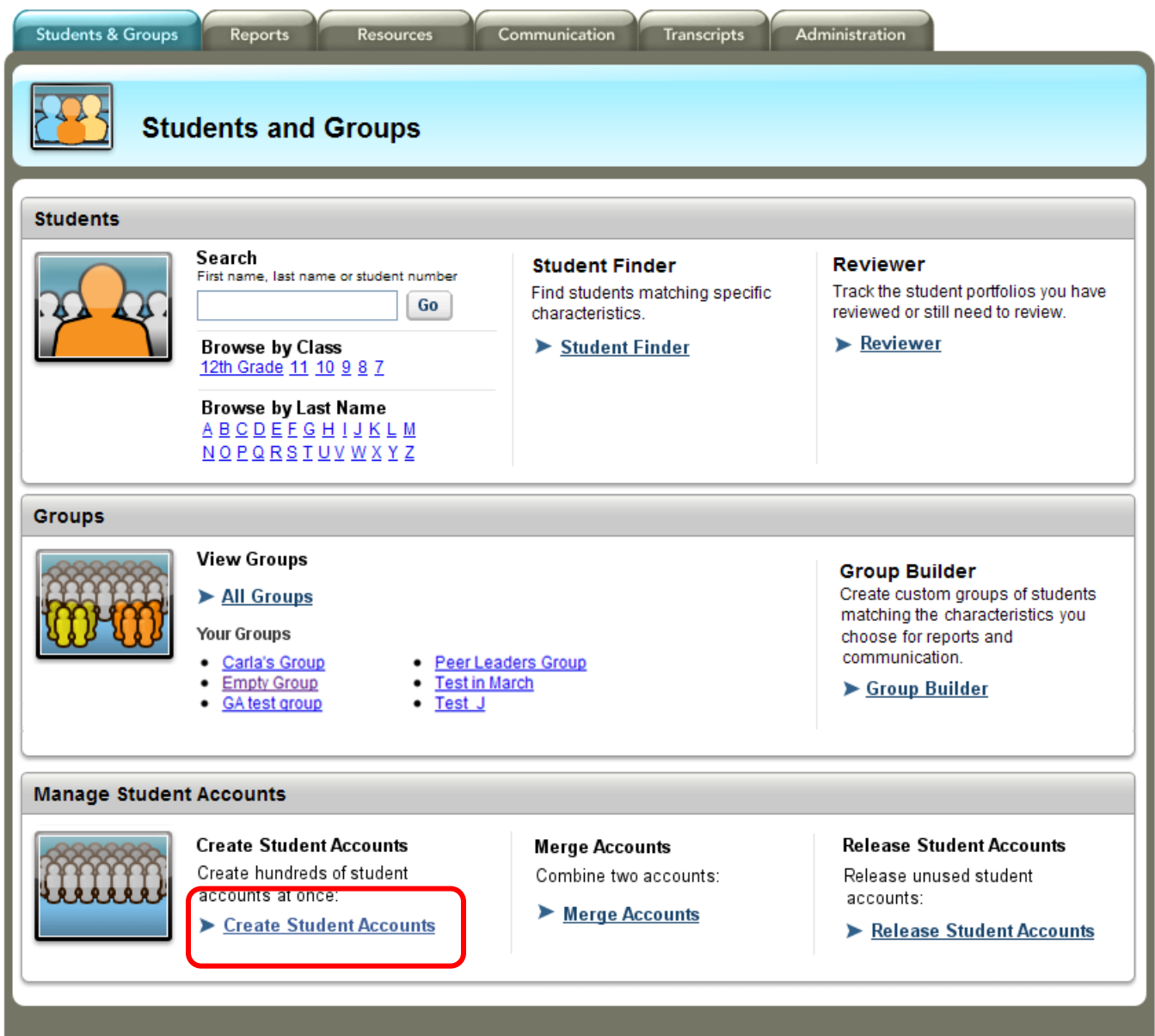
- Allowing the user to select from three account (user) **name creation conventions**;
- A template-based merge process to help the user create an **information sheet for each student** containing account information and sign in instructions;
- Creating and saving **reports on the batch** processed;
- **Raising the limit** on the maximum records in a batch to 500;
- **Flagging records** that should be excluded from account creation;
- **Creating a CollegelnColorado.org e-mail address** on student records for which the SIS had no e-mail address.

If a school can create a .csv-formatted file, such as an Excel spreadsheet, that contains specified fields of student data from their Student Information System, the Pro Center can upload the data and create a CollegelnColorado.org account (portfolio) for each student.

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### STEP-BY-STEP

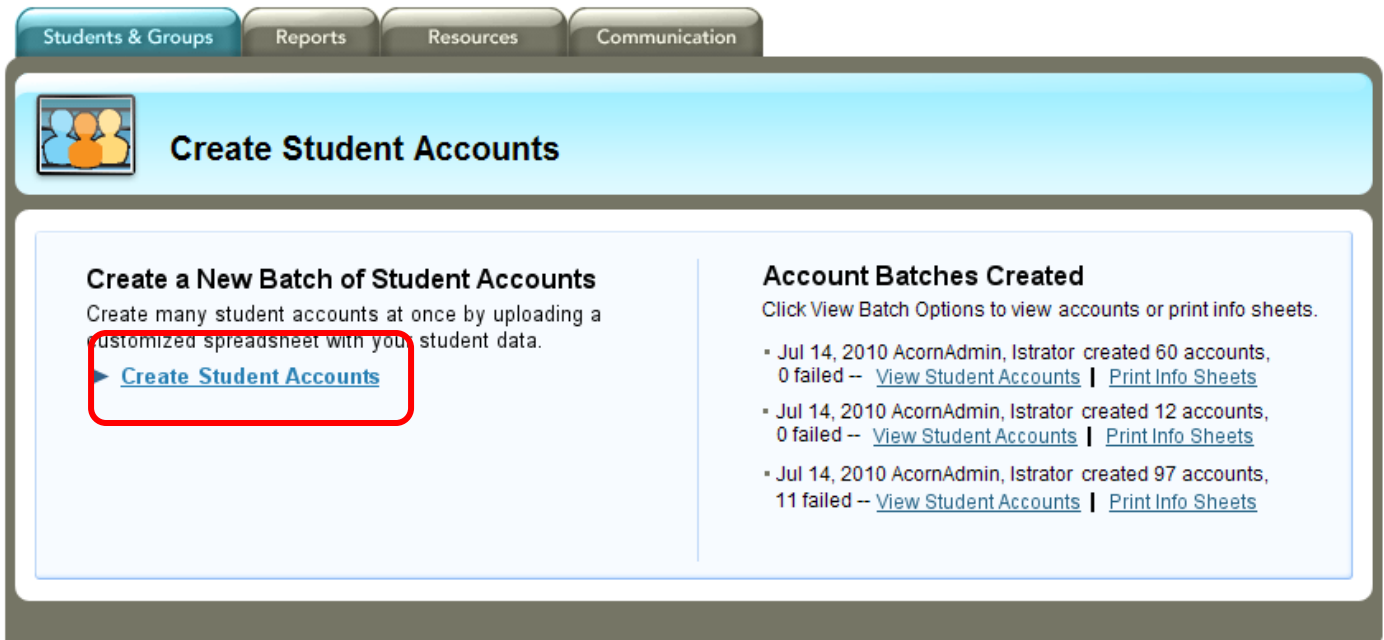
1. Create a Professional Account at <http://procenter.collegeincolorado.org> using your site's PAAK or AC.
2. Click on the **Students & Groups Tab**. In the Manage Student Accounts section, click on **Create Student Accounts**.



The screenshot shows the 'Students and Groups' interface with a navigation bar at the top containing 'Students & Groups', 'Reports', 'Resources', 'Communication', 'Transcripts', and 'Administration'. The main content area is divided into three sections: 'Students', 'Groups', and 'Manage Student Accounts'. The 'Students' section includes a search box, 'Browse by Class' (12th Grade, 11, 10, 9, 8, 7), and 'Browse by Last Name' (A-Z). The 'Groups' section includes 'View Groups' (All Groups) and 'Your Groups' (Carla's Group, Empty Group, GA test group, Peer Leaders Group, Test in March, Test J). The 'Manage Student Accounts' section includes 'Create Student Accounts' (highlighted with a red box), 'Merge Accounts', and 'Release Student Accounts'.

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### 3. Click on **Create Student Accounts**



Students & Groups | Reports | Resources | Communication

### Create Student Accounts

**Create a New Batch of Student Accounts**  
Create many student accounts at once by uploading a customized spreadsheet with your student data.  
[▶ Create Student Accounts](#)

**Account Batches Created**  
Click View Batch Options to view accounts or print info sheets.

- Jul 14, 2010 AcornAdmin, Istrator created 60 accounts, 0 failed -- [View Student Accounts](#) | [Print Info Sheets](#)
- Jul 14, 2010 AcornAdmin, Istrator created 12 accounts, 0 failed -- [View Student Accounts](#) | [Print Info Sheets](#)
- Jul 14, 2010 AcornAdmin, Istrator created 97 accounts, 11 failed -- [View Student Accounts](#) | [Print Info Sheets](#)

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If this feature has been used to create accounts at this site before, a record of each batch is listed in the shaded section on the right. The date, the name of the professional who created the batch, the number of accounts created and number failed (in red font) and links to [View Student Accounts](#) | [Print Info Sheets](#) will be shown.

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### 4. Work through the steps outlined on this page.

1. The user can select the account (username) convention from the following three alternatives:

- Student number [Student\_Id] + last name (Example: 0123456smith)
- Birth month (two-digit) + birthday (two-digit) + last name (Example: February 3 for John Smith: 0203smith)
- [code] + student number (Example: brdg0123456). Once something is entered in the code field it must remain there for all users of the site; it can be changed by any professional user. The code can be up to 6 characters long; allowable characters are letters of the alphabet, numbers 0-9, dash, underscore. If the radio button for this option is selected and invalid characters are entered, the following message will be displayed in a pop-up: **The code you entered contains invalid characters. The field accepts letters, numbers, dash and underscore.**

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### Create Student Accounts

Download the spreadsheet template, add your data to the file, then submit the file to create up to 500 accounts at a time.

**1. Choose batch options:**

- Student number + last name (Example: 0123456smith)
- Birth month (two digit) + birth day (two-digit) + last name (Example: May 5 for John Smith: 0505smith)
- + student number (Example: brdg0123456)

**2. Account Creation Template:**  
Open this customized spreadsheet template [Account Creation Template](#)  
(The .csv file may open in a new browser window or a spreadsheet program.)

**3. Instructions:**  
Copy your account data and paste it into the appropriate columns in the spreadsheet. [Follow these instructions](#) to get more information about the data you need.  
Save the spreadsheet file using a name and location you'll remember. Make sure that you save your spreadsheet as a .csv format file (not .xls or other formats.)

**4. Browse and Upload File:**  
Click Browse... to select the spreadsheet file you created in Step 2.

**5. Submit**  
Click Create Accounts to create accounts from your data file and review the results.

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2. Use the account creation template (order and field names) to create a data file from your SIS. Make sure you follow the formatting instructions in the “Follow these instructions” link of item 3. Do not include any blank lines in your file.

**Fields available include:**

Skip	Optional. When this field contains a 'Y' the record will be skipped and an account is not created
First_Name	Required
Last_Name	Required
Student_Id	Optional [we highly recommend you use the SASID]
Date_Of_Birth	Required Format mm/dd/yyyy
Email	Optional. If populated the e-mail address must be in a standard format (xxx@yyy.zzz).
Street_Address	Optional
City	Optional
State	Optional. If populated it must contain the 2 character state code or 'Foreign Country'
Zip	Optional
Country	Optional. If populated it must contain the 2 character country code
Grad_Year	Must be current graduation year or up to 9 years higher (i.e. 2010 - 2019).
Account_Type	Required One of the following values must be used: <ul style="list-style-type: none"> <li>• Middle School or Junior High School Student</li> <li>• High School Student</li> <li>• College or Postsecondary School Student</li> <li>• Adult</li> <li>• Parent</li> </ul>
Parent_First_Name	Optional
Parent_Last_Name	Optional

3. Save your file as a .csv format file to your file storage device
4. Browse to find your file and upload it
5. Click **Create Accounts** button to begin the batch process

**Please note:** Account names must be unique in the CollegInColorado.org and other statewide Xap systems. If a unique account name cannot be created using the selected naming convention, an integer will be appended to the account name until a unique account name is derived. The system will test the integer ‘1’ then incrementally add 1 until a unique account name is created.

**For example, based on the three account name options:**

- 1). Student number + last name (0123456smith) **if not unique, 0123456smith1, 0123456smith2, 0123456smith3 and so forth will be tested until a unique account name is acquired**

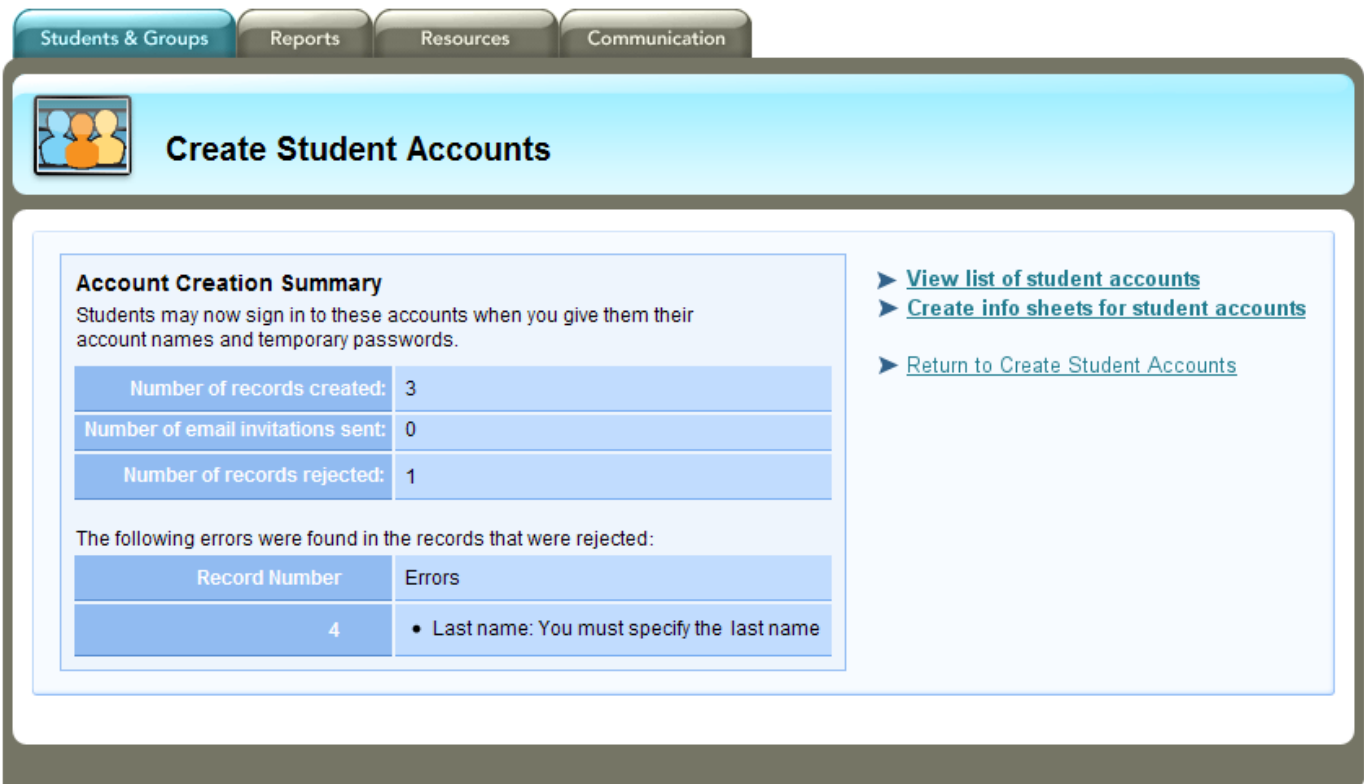
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2). Birth month (two-digit) + birthday (two-digit) + last name (February 3 for John Smith: 0203smith) **if not unique, 0203smith1, 0203smith2, 0203smith3 and so forth will be tested until a unique account name is acquired**

3). [code] + student number (brdg0123456) **if not unique brdg01234561, brdg01234562, brdg01234563 and so forth will be tested until a unique account name is acquired**

A message will be displayed in the list of created accounts to flag those with a digit added to make them unique.

5. A temporary password for each record will be generated by the system. Users will be prompted to reset their password when they sign in for the first time.
6. When the batch has completed processing, an Account Creation Summary Page will appear:



Students & Groups | Reports | Resources | Communication

### Create Student Accounts

**Account Creation Summary**  
Students may now sign in to these accounts when you give them their account names and temporary passwords.

Number of records created:	3
Number of email invitations sent:	0
Number of records rejected:	1

The following errors were found in the records that were rejected:

Record Number	Errors
4	<ul style="list-style-type: none"><li>Last name: You must specify the last name</li></ul>

- [View list of student accounts](#)
- [Create info sheets for student accounts](#)
- [Return to Create Student Accounts](#)

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**Note:** The number of e-mails sent is not saved by the system and can only be viewed from the batch summary page immediately after the batch has completed. In a subsequent session, this line of information is not available.

For records with errors, the second table lists the reason(s) why they failed including:

- Record number = the line in the spreadsheet
- Error = the reason why the record failed

**Note:** This information is not saved by the system and can only be viewed from the batch summary page immediately after the batch has completed. In a subsequent session, this line of information is not available.

**7.** Click on **View list of student accounts** to view a report of the accounts processed.

**8.** Click on **Create info sheets for student accounts**

This option allows the professional to complete an information sheet containing account name, temporary password and sign in instructions. One sheet or page is generated for each account.

A common template can be used for both student and parent info sheets with only a slight difference in the instructional text as noted in the table below. When the link to 'Create Info Sheets ' is selected, the template shown below pop-ups. Each field is pre-populated with text that the professional can edit.

The top section of the page includes a link to 'restore the original before any editing'. When this link is selected, the info sheet text will revert back to the original best practices text.

If a professional customizes the text on the account info sheet template, their changes are saved as the new default for their site.

Users can:

[Preview Template](#)

[Create Info Sheets](#) – generate a PDF file with a page break separating the information for each account.

[Cancel and Return to Review and Update](#) – aborts the info sheet operation, closes the pop-up and returns the user to the Review and Update page.

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**Accounts Created:** 212      **Created by:** Mrs. Smith  
**Date created:** March 4, 2010

### Create Info Sheets

Customize this template to create a batch of info sheets -- one for each of the accounts in this batch. Fields left blank will not appear on the info sheets. A PDF file will be created for easy printing.

Text in the boxes below is from the last saved version -- you may [restore the original before any editing](#).

**Include System Name and Logo?**  Yes  No      This is the same system name and logo that appears on all student-facing pages.

**Header Text:**       This header will be a bold title in a larger font.

**Introduction Text:**       Edit this text or leave the default text to introduce users to this process. Leave it blank if you don't want text in this space.

**Name:** (Name will be displayed)      These fields cannot be edited. They will appear in a larger, bolder font than the text above and below.  
**Account Name:** (Account Name will be displayed)  
**Temporary Password:** (Password will be displayed)

**Instructional Text:**       Edit this text to offer additional instructions or guidance. You may leave the default text if it meets your needs. Leave it blank if you don't want any more text on the page.

▶ [Preview Template](#)  
▶ [Create Info Sheets](#)  
▢ [Cancel and Return to Review and Update](#)

Fields and text contained in this form:

### Create Information Sheets

Customize this template to create a batch of info sheets – one for each of the accounts in this batch. Fields left blank will not appear on the info sheets. A PDF file will be created for easy printing.

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Include System Name and Logo?	Yes/No	This is the same system name and system logo that appear at the top of all pages in the system.
Header Text:	Signing In to Your Account on <system name>	This header will be a bold title in a larger font
Introduction Text:	Use the following information to sign in to your new account at <system URL>	Edit this text or leave the default text to introduce students/parents to this process. Leave it blank if you don't want text in this space.
Name:	(First and Last Name will be displayed)	These fields cannot be edited. They will appear in a larger, bolder font than the text above and below.
Account Name:	(Account Name will be displayed)	
Temporary Password:	(Temporary Password will be displayed)	
Instructional Text for Students:	<ol style="list-style-type: none"> <li>1. Visit &lt;system URL&gt;</li> <li>2. Click "Sign In"</li> <li>3. Enter your account name and temporary password</li> <li>4. Follow the instructions to create a secure password you will remember</li> <li>5. Click on Your Portfolio, then Your Profile, then The Basics – make sure your personal information is accurate and update it if necessary</li> <li>6.</li> </ol>	Edit this text to offer additional instructions or guidance. You may leave the default text if it meets your needs. Leave it blank if you don't want any more text on the page.

**Note:** If the professional had selected an old batch to print (or re-print) and some of those accounts have since been deleted, they will not be included in the new printout.

If the professional had selected an old batch to print (or re-print) and the passwords have already been reset on some of the accounts, "Password has been reset by student" will be displayed in the password field.