

## Bulk Account Uploads

District Data Security Managers have the ability to use Bulk Account Uploads in order to manage accounts in bulk.

Bulk Account Uploads is located in EDS Administration in your application list. Click Bulk Account Uploads under Manage People on the left navigation.

Bulk Account Uploads offers three options for managing accounts.

1. Create New Accounts
2. Update Existing Accounts
3. Add Roles

**EDS Administration**

**Bulk Account Update**

**Create New Accounts**  
[File Spec](#)  
Browse... No file selected. **Upload**

**Update Existing Accounts**  
[File Spec](#)  
Browse... No file selected. **Upload**

**Add Roles**  
[File Spec](#)  
Browse... No file selected. **Upload**

**Navigation Menu:**

- > Select Organization
- > Manage People
  - > Create New Person
  - > Edit Person
  - > Requested Roles
  - > Bulk Account Uploads
- > Manage Organizations
  - > Edit Organization
  - > Edit Contact Info
  - > Edit Directory Info
  - > Contract Schools
  - > New Schools Requested
- > Reports
  - > Organization Hierarchy
  - > Security By Role
  - > Security By Organization
  - > User Roles by Organization
  - > Contract List
  - > School Profile Data
  - > Education Directory
- > Info Center

Each option includes a specific File Spec (file specification) that must be used in order to successfully upload a document. All three options have their own File Spec but each one gives the following information in order to create your document:

- FieldName
- DataType
- Required
- Length

Do not include headers when you upload documents. Only tab delimited documents can be uploaded into Bulk Account Uploads.

## Create New Accounts



**Create New Accounts**

[File Spec](#)

No file selected.

You can create new accounts by using Create New Accounts. Click on the *File Spec* link to view the document requirements. You'll be prompted to open a new Excel document.

	A	B	C	D
1	FieldName	DataType	Required	Length
2	LoginName	string	Y	250
3	FirstName	string	Y	60
4	MiddleName	string	N	60
5	LastName	string	Y	60
6	Birthdate	date	Y	10
7	Gender	M/F/N	Y	1
8	PrimaryEmail	string	Y	250
9	SecondaryEmail	string	N	250
10	HomeAddressLine1	string	N	80
11	HomeAddressLine2	string	N	80
12	HomeCity	string	N	50
13	HomeStateProvince	string	N	50
14	HomeCountry	string	N	50
15	HomeZipcode	string	N	15
16	HomePhoneNumber	string	N	30
17	HomeFax	string	N	30
18	BusinessAddressLine1	string	N	80
19	BusinessAddressLine2	string	N	80
20	BusinessCity	string	N	50
21	BusinessStateProvince	string	N	50
22	BusinessCountry	string	N	50
23	BusinessZipcode	string	N	15
24	BusinessPhoneNumber	string	N	30
25	BusinessFax	string	N	30
26	CertificationNumber	string	N	7

Create your file for new accounts using the File Spec.

Upload your file into Create New Accounts by clicking the browse button, selecting your file, and then clicking Upload.

You will be notified of which records were accepted and/or if you incurred any errors.

If you incur errors, you can download them to see which specific records have errors. Please note, there is a limit to 400 records per upload.

**Accepted (1)**

LoginName	FirstName	MiddleName	LastName	Birthdate	Gender	PrimaryEmail	SecondaryEmail	HomeAddressLine
Sunny@edstest.com	Sunny		Test	04/01/1960	M	sunny@edstest.com		5625 Sunview Dr.

**Errors** [Click here to download](#)

Error	ErrorCount
Birthdate is not a valid date.	1
The length of Gender must be less then 1 characters. Gender must have a value of M F or N.	1
PrimaryEmail must have a value.	1
SecondaryEmail must be a valid email address.	1
HomeAddressLine1 must have a value.	1
HomePhoneNumber must have a value.	1
Missing Columns	1
LoginName is already taken.	1

If all of your records are Accepted and are correct, click Save. If you notice any of the data is not correct, click Cancel.

If you have both Accepted records and records with errors, you have two options.

1. Click Cancel, fix the errors in your file, and then upload the file again.
2. Click Save (this will only save the accepted records), edit your file to remove records that were accepted and fix the records that have errors, then upload the file again.

**Note:** If you click "Cancel", the whole process is voided.

Once saved, the following message will appear: "Your file has been imported successfully." An email notification is sent to the PrimaryEmail of the Accepted and saved record(s).

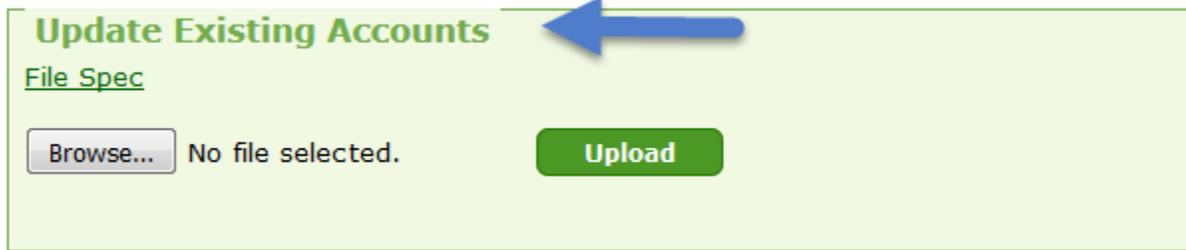
**Create New Accounts**

[File Spec](#)

No file selected.

Your file has been uploaded successfully

## Update Existing Accounts



**Update Existing Accounts** ←

[File Spec](#)

No file selected.

You can edit data in existing EDS accounts by using Update Existing Accounts. Click on the *File Spec* link to view the document requirements. You'll be prompted to open a new Excel document.

FieldName	DataType	Required	Length
LoginName	string	Y	250
NewLoginName	string	N	250
UpdatePasswordFlag	Y/N	N	1
FirstName	string	Y	60
MiddleName	string	N	60
LastName	string	Y	60
Birthdate	date	Y	10
Gender	M/F/N	Y	1
PrimaryEmail	string	Y	250
SecondaryEmail	string	N	250
HomeAddressLine1	string	N	80
HomeAddressLine2	string	N	80
HomeCity	string	N	50
HomeStateProvince	string	N	50
HomeCountry	string	N	50
HomeZipcode	string	N	15
HomePhoneNumber	string	N	30
HomeFax	string	N	30
BusinessAddressLine1	string	N	80
BusinessAddressLine2	string	N	80
BusinessCity	string	N	50
BusinessStateProvince	string	N	50
BusinessCountry	string	N	50
BusinessZipcode	string	N	15
BusinessPhoneNumber	string	N	30
BusinessFax	string	N	30
CertificationNumber	string	N	7

Create your file to update existing accounts using the File Spec.

Upload your file into Update Existing Accounts by clicking the browse button, selecting your file, and then clicking Upload.

You will be notified of which records were accepted and/or if you incurred any errors. If you incur errors, you can download them to see which specific records have errors. Please note, there is a limit to 400 records per upload.

**Accepted (1)**

LoginName	FirstName	MiddleName	LastName	Birthdate	Gender	PrimaryEmail	SecondaryEmail	HomeAddressLine
Sunny@edstest.com	Sunny		Test	04/01/1960	M	sunny@edstest.com		5625 Sunview Dr.

**Errors** [Click here to download](#)

Error	ErrorCount
Birthdate is not a valid date.	1
The length of Gender must be less then 1 characters. Gender must have a value of M F or N.	1
PrimaryEmail must have a value.	1
SecondaryEmail must be a valid email address.	1
HomeAddressLine1 must have a value.	1
HomePhoneNumber must have a value.	1
Missing Columns	1
LoginName is already taken.	1

If all of your records are Accepted and are correct, click Save. If you notice any of the data is not correct, click Cancel.

If you have both Accepted records and records with errors, you have two options.

1. Click Cancel, fix the errors in your file, and then upload the file again.
2. Click Save (this will only save the accepted records), edit your file to remove records that were accepted and fix the records that have errors, then upload the file again.

**Note:** If you click "Cancel", the whole process is voided.

Once saved, the following message will appear: "Your file has been imported successfully." An email notification is then sent to the PrimaryEmail of the Accepted and saved record(s).

**Update Existing Accounts**

[File Spec](#)

No file selected.

Your file has been uploaded successfully

## Add User Roles

You can add user roles to existing EDS accounts by using Add Roles.

Click on the File Spec link to view the document requirements. You'll be prompted to open a new Excel document.

This File Spec includes a list of roles that are able to be assigned in Bulk Uploads. *NOTE:* An OSPI Legacy Code is the same as a County District Code (when adding district level roles) or a school code (when adding school level roles) in EDS Administration.

FieldName	DataType	Required	Length		
LoginName	string	Y	250		
Organization Code	string	Y	5		
RoleTypeID	number	Y	5		
Valid RoleTypeID.					
	3373	ALE Annual Report User			
	7286	ARMS_District Superintendent			
	7284	ARMS_School Assessment Coordinator (SAC)			
	7285	ARMS_School Assessment Coordinator Designee			
	3330	AttendanceAndWeapons Attendance User			
	3332	AttendanceAndWeapons District Administrator			

You will be notified of which records were accepted and/or if you incurred any errors.

If you incur errors, you can download them to see which specific records have errors. Please note, there is a limit to 400 records per upload.

**Accepted (1)**

LoginName	OSPILegacyCode	RoleTypeId	PersonId	NewPersonId	OrganizationId	GenderTypeId	RoleName
beth@edstest.com	17210	7224	170047		100086		eValDistrictEvaluator

**Errors** [Click here to download](#)

Error	ErrorCount
LoginName not found.	2

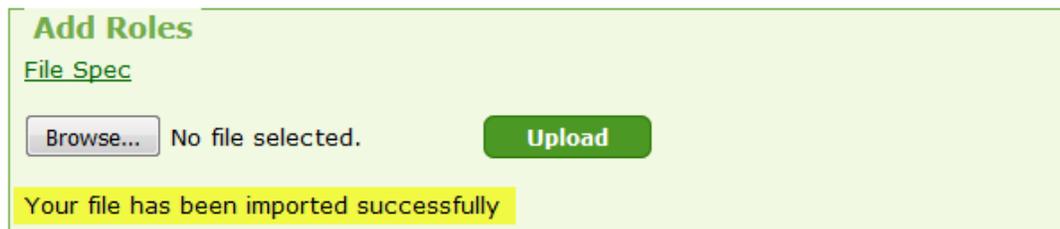
If all of your records are Accepted and are correct, click Save. If you notice any of the data is not correct, click Cancel.

If you have both Accepted records and records with errors, you have two options.

1. Click Cancel, fix the errors in your file, and then upload the file again.
2. Click Save (this will only save the accepted records), edit your file to remove records that were accepted and fix the records that have errors, then upload the file again.

**Note:** If you click “Cancel”, the whole process is voided.

Once saved, the following message will appear: “Your file has been imported successfully.” An email notification is then sent to the PrimaryEmail of the Accepted and saved record(s).



The screenshot shows a light green interface titled "Add Roles". Below the title is a link "File Spec". There is a "Browse..." button followed by the text "No file selected." and a green "Upload" button. At the bottom, a yellow highlighted box contains the message "Your file has been imported successfully".