

Steps for Creating and Uploading PSAT_SAT Pre-ID Data

1) Download the PSAT_SAT Pre-ID Excel Template, Tips Sheet, and Steps for Creating and Uploading a PSAT_SAT Pre-ID data

- a. Located on the SIS Website – <https://www.isbe.net/Pages/Student-Information-System.aspx>
- b. Listed in Resources Box (Left of the page) → SIS Excel Templates
- c. Save the files to a local computer or server
 - i) Save the template to your computer/server before opening it in Excel. For example, right Click and perform ‘Save As’ or ‘Save Target As’.
 - ii) Save the word documents (Tip Sheet and Steps) to your computer before opening it in Word.
- d. Excel Template is named → PSAT_SAT Pre-ID_Win.csv
- e. Excel Tips is named → Tips For Completing PSAT_SAT Pre-ID data
- f. Steps document is named → Steps for Creating and Uploading PSAT_SAT Pre-ID data.

2) Create the PSAT_SAT Pre-ID File Header in Row 1/ Columns B, C, D & E

- a. Enter the number of student records being submitted in Row 1/Column B.
- b. Enter the name of the file plus .csv in Row 1/Column C (Ex: Riverton HS.csv).
Note: This example PSAT_SAT same name must be entered in the “SAVE AS” pop up (Name and Type fields) when creating the CSV file later in the process.
- c. Enter the date the .csv file to be uploaded to IWAS/SIS in Row 1/Column D (Ex: 09/05/2016).
- d. Enter your district/school 15 digit RCDTS code in Row 1/Column E.
Note: This is the RCDTS assigned to your IWAS account. This can be verified via your IWAS profile.

3) Enter the student’s demographic, and PSAT_SAT Pre-ID details in the PSAT_SAT Pre-ID excel template

Starting with Row 3 enter all mandatory data (see Tip Sheet for mandatory fields) and, when available, any optional data for each student record.

- a. Enter the 9-digit SIS Student Id number in Column A
 - i) Student must have a SID entered.
- b. Enter your local SAP Identifier (up to 50 digits) if applicable.
- c. Enter the student’s Last Name and First Name
- d. Use the date format – mm/dd/yyyy - for all date fields, i.e. Birth date.
- e. The HOME school 15 digit RCDTS code will have the same first 11 digits as the district code with different last 4 digits which identify the school building.
- f. The SERVING school 15 digit RCDTS may be the same as the Home (if the student attends their home school for educational services) or different (if the student attends another education entity for their educational services such as a Special Ed cooperative or a vocation education facility). Use the correct Code Values (See the Data Elements Document located on the SIS Website – <https://www.isbe.net/Pages/Student-Information-System.aspx> for code values) for the following data elements:
- g. The Testing School is the Region, County, District, Type, and School/Program code that uniquely identifies the school/program where a student will be taking a state assessment during the current school year. For all students, their Testing school will default to the Serving school.
- h. Sort Group

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4) Save the PSAT_SAT Pre-ID Excel Template as a Comma Separated Values (.csv) file

- a. Open the PSAT_SAT Pre-ID Excel Template or if you already have the spreadsheet open save the Excel version (.XLS extension) to keep the student record details just entered and keep a backup/working document.
- b. On the File menu click File → Save As
- c. In the File Name box type the same file name as you typed in 1-C excluding the '.csv'.
 - i) Example: If 1-C has Riverton.csv, type Riverton in the File Name box.
- d. Look at the **Save in:** and either take note of where the file is being saved or change the location to another desired location. Keep the Save As type, Microsoft Excel Workbook. Click Save.
- e. After saving the backup file, on the File menu click File → click Save As a second time.
- f. In the Save As Type List, select CSV (Comma delimited) to add the .csv extension.
- g. Click Save.
- h. When notified via a pop up that the file may contain features not compatible with CSV click Yes to keep the workbook in the current format and finish saving the file.
- i. Close the Excel file.
 - i) When prompted to save your changes to the CSV file click *No*.

Note: There will be 2 files at the end of these PSAT_SAT icons: the excel template and a .csv file.

5) Upload the PSAT_SAT Pre-ID file via IWAS/SIS/File Upload screen

- a. Login into IWAS/SIS using appropriate role for uploading – RCDT/ADMIN role.
- b. Access SIS from System Listing
- c. Click Upload/Download File link within SIS
- d. Click Browse to locate the CSV PSAT_SAT Pre-ID file named – (what you entered in 1-C).csv.
 - i) Example: Riverton.csv
- e. Click Open to return to the Upload File page
- f. Click the Upload button to complete the transmission to SIS.
- g. If you receive a message indicating your file has been uploaded successfully you are finished and should wait to receive an email indicating your file has been processed and ready to be downloaded.
- h. If you receive any file format errors, you will want to go back to your Excel Template (XLS) version to make your changes and then re-create a new CSV file.

Note: Never make any changes in the CSV version as the formatting will be lost causing records to fail.

6) Review the Result Codes and Result Messages in Columns I and J after the file is processed and returned to you.

- a. Login to IWAS.
- b. Access SIS from System Listing.
- c. Click Upload/Download File link within SIS.
- d. Locate the PSAT_SAT Pre-ID File named – (what you entered in 1-C).csv.
 - i) Example: Riverton.csv

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- e. Save the file to your pc or a server.

Note: DO NOT OPEN THE FILE AND THEN SAVE WHILE THE FILE IS OPEN. Save the file before opening in Excel. For example, right Click and perform 'Save As' or 'Save Target As'.

- f. Import data from the returned .csv file to the existing PSAT_SAT Pre-ID Template
 - i) Open the CSV file that you downloaded (DO NOT SAVE IT)
 - ii) Open the PSAT_SAT Pre-ID template (XLS)
 - iii) Keep both the source data spreadsheet and the Excel template open
 - iv) Highlight the cells - Row 2/Column A through Column L and all rows with student data
 - (1) Make sure the Result Codes and Result Messages (M and N) are not copied to the template
 - (2) Do not highlight beyond column N (the result details or blank space following) or highlight the entire row (do not include the row number on the far left).
 - v) Select Edit → Copy
 - vi) Navigate to the PSAT_SAT Pre-ID Excel Template
 - vii) Click on cell Row 3/Column A prior to pasting the data
 - viii) Select Edit → Paste Special
 - ix) When the pop-up box opens Select *Values* and click *Ok*.

7) Make changes if corrections are required and re-submit a new .csv file to IWAS/SIS.

- a. All corrections are made in the PSAT_SAT Pre-ID Excel template
- b. Open the original PSAT_SAT Pre-ID template to make the corrections.
- c. Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.
- d. Correct all errors identified in Columns M & N.
- e. When all changes are complete, create a new .csv file following the SAVE AS process.
- f. Upload the file to IWAS/SIS/File Upload/Download screen.