

# Using Lexia's Automated Data Import

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This document explains how to use Lexia's Automated Import ("AI") feature to automate the addition, modification, and deletion of school, student, staff, and class data through the nightly processing of CSV files on [www.myLexia.com](http://www.myLexia.com).

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## Configuring and Activating Automated Data Import

1. Log into [www.myLexia.com](http://www.myLexia.com) as a user with District Admin access and click the Settings tab.
2. Under the Automated Import section, click the Settings link.  
Note: If you do not see the Automated Import section, please contact Lexia Customer Support.
3. Configure the General Configuration information and then click Save:
  - Data to import. Possible combinations include:
    - ◊ Schools/Student/Staff
    - ◊ Schools/Students
    - ◊ Schools/Students/Staff/Classes
    - ◊ Schools/Staff
  - Outgoing IP address from where you will be transferring your import CSV files.
  - Summary Email address that will receive the nightly import summaries.
4. On the Settings tab, click the SFTP Configuration link. Then, create the account for file hosting by clicking the Create Account button. You will have a user account created using the following naming convention:  
[customer initials]\_[uniqueCode] where [customer initials] is the combination of the first letter/number of each word in the customer's name (e.g., wsd2 would be the customer initials for Washington School District 266); [unique code] is assigned at random (e.g., wsd2\_875).
5. The directory on the SFTP server (e.g., wsd2\_875 ) has two subdirectories:
  - imports – where you upload the nightly CSV import files,
  - logs – where you may access recent log files.
6. A password for the SFTP account is automatically assigned. If you need to change or recover the password, you can return to this screen and click the Update Password button.

7. Customers who currently have students using Lexia must click the Set Unique IDs link on the Settings tab. You need to upload initial CSV files in order to set the student's unique IDs so existing student records can be matched during the import. For information on preparing CSV files, see the following sections. You can resolve conflicts after uploading the initial CSV files.
8. Click the Username/Password Settings to configure how student usernames and passwords will be provisioned.
  - Provisioning through Clever: Sending student usernames to myLexia is optional.
    - ◊ If you are sending a username, leave the "Use my provided username" option selected.
    - ◊ If you are not sending a username, select one of the other options. Note that if you select SIS ID, State ID, or Student Number, you must be sending the field to myLexia from Clever.

Sending student passwords to myLexia through Clever will no longer be supported as of July 2016. Select another option to provision student passwords, if needed. This allows students to login directly to a Lexia program. Note that if you select SIS ID, State ID, Student Number or date of birth, you must be sending the field to myLexia from Clever.
  - If you are provisioning through AI/SFTP: Sending student usernames and passwords to myLexia is optional. If you will send a username or password, leave the default "Use my provided" option selected. If you select another option, make sure you provide this field to myLexia in the CSV files. For more information, see page 4.
9. When all required information has been provided and you are ready to turn on the imports, on the Settings tab, click the Activate link in order to activate automated import. Ideally, Unique IDs should be set for all existing objects within the Lexia database, but if any conflicts exist that have not been resolved, upon clicking Activate you will be warned that any objects without unique IDs will be deleted.

## Preparing CSV Files

### General CSV Formatting Guidelines

- CSV files should be named using the format: [SFTP account username]\_[data type].csv  
Note that the entire filename must be lower-case. You can find the SFTP account username on the SFTP Account Configuration screen in myLexia. For example, for account username wsd2\_875, the CSV import files would be named:
  - ◊ wsd2\_875\_student.csv
  - ◊ wsd2\_875\_school.csv
  - ◊ wsd2\_875\_staff.csv
  - ◊ wsd2\_875\_class.csv
- Each CSV file must contain a header row (first line) with the names of all required columns included. Optional columns can be excluded.
- The column headers can be in any order, but the rows in the data following must be in the same order as the headers.
- The column name must match the "Column Heading" values listed in the following tables.
- Optional fields can be left empty in the CSV file. If an optional column is included, data is not required in that column. For example, if the following header row was at the top of the CSV file:  
StudentId, SchoolId, FirstName, MiddleInitial, LastName, Suffix, Username, Password, Grade, DOB, Gender  
and if a student did not have a Middle Initial or Suffix, their row might look like this:  
10058,235, Lucy, , McNeil, , lmcneil, lucy, 1, 1998-01-22, F

- If required fields are missing, an error is generated and that row is ignored.
- During the initial setup of Automated Data Import **only**, the CSV files may contain “Exception” schools, students, staff, and classes (see page 7 for information on exceptions). These data objects will be exempt from the Import process, meaning they will not be deleted when Auto Import is run if they do not exist in the CSV files. To designate a data object as an exception during the Set Unique IDs process, use the word “EXCEPTION” as an ID (SchoolID, StudentID, StaffID, or Class ID).

### Preparing the School CSV File

[customer’s initials]\_school.csv contains a row for each school with the following fields:

Column Heading	Description	Acceptable Characters	Max. Characters
SchoolID <b>(Required)</b>	School Unique ID	Numbers and letters (a–z, A–Z)	32
Name <b>(Required)</b>	School Name	Valid characters include: (a–z, A–Z) 0123456789 _.-@'!#\$%&'+-/?^_`{ }~ [ ] : ; , and spaces Invalid characters are “ \ < ”	50

### Preparing the Student CSV File

[customer’s initials]\_student.csv contains a row for each student with the following possible fields:

Column Heading	Description	Acceptable Values (in Bold) or Characters	Max. Characters
StudentID <b>(Required)</b>	Student Unique ID	Numbers and letters (a–z, A–Z)	32
SchoolID <b>(Required)</b>	School Unique ID	Numbers and letters (a–z, A–Z)	32
FirstName <b>(Required)</b>	First Name	Valid characters include: (a–z, A–Z) 0123456789 _.-@'!#\$%&'+-/?^_`{ }~ [ ] : ; , Spaces are allowed in First Name and Last Name only. Invalid characters are “ \ < ”	50
MiddleInitial (optional)	Middle Initial		1
LastName <b>(Required)</b>	Last Name		50
Suffix (optional)	Jr., III, etc.		10
Username (optional; see the next page for info)	For student login. Must be unique.	Valid characters include: (a–z, A–Z) 0123456789 _.-@'!#\$%&'+-/?^_`{ }~ [ ] : ; , Invalid characters are “ \ < ”	50
Password (optional; see the next page for info)	Student Password. Note that passwords are case-sensitive.	Spaces are not allowed. The minimum number of characters is 4.	50
Grade (US) Year (UK) <b>(Required)</b>	Student’s Grade/Year	<b>PK</b> (for US PreK), <b>N</b> (for UK Nursery), <b>KG, K, 0</b> (for US K), <b>R</b> (for UK Reception), <b>1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, PG</b> (post-graduate/adult), or <b>Other</b>	na

## Student CSV File Fields, continued

Column Heading	Description	Acceptable Values (in Bold) or Characters	Max. Characters
StateID (optional)	Student's State ID	Numbers and letters (a–z, A–Z)	50
SISID (optional)	Student's SIS (Student Information System) ID	Numbers and letters (a–z, A–Z)	50
StudentNumber (optional)	Student's Number	Numbers and letters (a–z, A–Z)	50
DOB (optional)	Student's Date of Birth	Must be in format yyyy-mm-dd or mm/dd/yyyy	na
Gender (optional)	Student's Gender	<b>M, F</b> or <b>X</b>	na
Race (optional)	Student's Race	<b>0998</b> - American Indian or Alaska Native <b>0999</b> - Asian <b>1000</b> - Black or African American <b>1001</b> - Native Hawaiian or Other Pacific Islander <b>1002</b> - White <b>5000</b> - Other <b>5001</b> - Multiracial	na
HispanicLatino (optional)	Student's Ethnicity (Hispanic or Latino)	<b>Yes</b> or <b>No</b>	na
IDEA (optional)	Eligible for IDEA	<b>Yes</b> or <b>No</b>	na
ELL (optional)	ESL/ELL	<b>Yes</b> or <b>No</b>	na
Title1 (optional)		<b>Yes</b> or <b>No</b>	na

For example, if you used all of these student fields, the header row of [customer's initials]\_student.csv would look like this:

```
StudentId, SchoolId, FirstName, MiddleInitial, LastName, Suffix, Username,
Password, Grade, DOB, StateID, SISID, StudentNumber, Gender, Race,
HispanicLatino, IDEA, ELL, Title1
```

### If Student Usernames and Passwords are Not Provided

If you do not provide the student username and password columns, you must configure Automated Import to generate one from another field that is being sent. For more information, see Step #8 on page 1.

If you configure the student username to be generated based on the student's first name and last name, this may result in duplicate usernames. myLexia will pad duplicate usernames with incremented numbers. For example, if the username scheme is first name\_last name and there are three students named Diego Vega, the usernames would be diego\_vega, diego\_vega1, and diego\_vega2.

If you configure the student username to be generated from the SIS ID, State ID, or Student Number, any duplicates in the CSV file will be flagged as an error, and any value less than four characters in the CSV file will be flagged as an error. .

If you configure the student username and password to be generated based on the student's first name and last name, this may result in usernames and passwords that do not meet the four character minimum. In this case, myLexia will prepend the username or password with a "1" or "11." For example, if the username scheme is first initial + last name, Michael Ho would have a username of 1mho.

## Preparing the Staff CSV File

[customer's initials]\_staff.csv contains a row for each staff with the following possible fields:

Column Heading	Description	Acceptable Values (in Bold) or Characters	Max. Characters
StaffID <b>(Required)</b>	Staff Unique ID	Numbers and letters (a-z, A-Z)	32
SchoolID <b>(Required)</b>	School Unique ID	Numbers and letters (a-z, A-Z)	32
FirstName <b>(Required)</b>	First Name	Valid characters include: (a-z, A-Z) 0123456789 _-@'!#\$%&'*+ /= ? ^ _ {   } ~ [ ] : ; ,	20
LastName <b>(Required)</b>	Last Name	Spaces are allowed in First Name and Last Name only. Invalid characters are " \ <	30
Username <b>(Required)</b>	Username. Must be unique and in the form of an email address*	Valid characters include: (a-z, A-Z) 0123456789 _-@'!#\$%&'*+ /= ? ^ _ {   } ~ [ ] : ; ,	255 (must be email address)
Password (Optional**)	Password	Invalid characters are " \ <	6-20
Role <b>(Required)</b>	The role controls the level of access that a staff has on the myLexia website.	<b>DAA</b> - District Admin Access <b>DRO</b> - District Read Only <b>SAA</b> - School Admin Access <b>SRO</b> - School Read Only <b>CRO</b> - Teacher/Class Read Only <b>C</b> - Teacher/Class Access	na

\* For Centralized Staff Authentication (CSA) customers, the assumption is that the network username is the first part of the email address (everything before @).

\*\* Though staff passwords are required to login to myLexia, customers are not required to provide a Staff password in the CSV files. If you are creating new staff members and do not assign a password in the CSV file, then the staff must click the "Forgot Password?" link on the myLexia Login page in order to receive a secure link to reset their password. Note that if you provide a password in the CSV file after staff have created their own passwords, the password in the CSV will overwrite the staff's password. Staff in CSA customers use their network passwords.

## Preparing the Class CSV File

[customer's initials]\_class.csv contains a row for each class with the following possible fields:

Column Heading	Description	Acceptable Values (in Bold) or Characters	Max. Characters
ClassID <b>(Required)</b>	Class Unique ID	Numbers and letters (a–z, A–Z)	32
SchoolID <b>(Required)</b>	School Unique ID	Numbers and letters (a–z, A–Z)	32
Name <b>(Required)</b>	Class Name	Valid characters include: (a–z, A–Z) 0123456789 _.-@!#\$%&'*+ /=?^_`{ }~ [ ] : ; , Spaces are allowed in First Name and Last Name only. Invalid characters are “ \ <	40
Grade (US Only) Year (UK Only) <b>(Required)</b>	Grade (US customers) or Year (UK customers) of the class.	<b>PK</b> (pre-school/pre-K), <b>KG, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, PG</b> (post-graduate/adult), or <b>Other</b>	na
StaffId <b>(Required)</b>	Staff Unique ID (repeat heading for each staff in class)	Numbers and letters (a–z, A–Z)	32
StudentId (optional)	Student Unique ID (repeat heading for each student in class)	Numbers and letters (a–z, A–Z)	32

For example, the header row of the [customer’s initials]\_class.csv file for a customer who has 3 or fewer staff assigned to each class and 30 or fewer students in each class would look like this:

```
ClassId, SchoolId, Name, Grade, StaffId, StaffId, StaffId, StudentId, StudentId,
StudentId, StudentId, StudentId, StudentId, StudentId, StudentId, StudentId, StudentId
```

## Uploading CSV Files

In preparation for the update process, you must transfer one CSV file per data type (schools, students, staff, and/or classes) to your SFTP site imports subdirectory on a nightly basis (or less often if desired). If no new files are available (based on the modified date of the file), the update process will stop.

## Update Process

An update process will run nightly to automatically add, modify, and delete each data type that is turned on the myLexia UI configuration.

**Add Data:** If a Student/Class/Staff/School Unique ID exists in the CSV file but that Unique ID is not found in the Lexia database, the data in that row is added to the Lexia database. If a student was previously deleted and appears in the CSV file, they will be re-activated with their previous data intact (unless they were “hard-deleted” in the Archive tab on the myLexia UI).

**Modify Data:** If a Student/Class/Staff/School Unique ID exists in the CSV file and in the Lexia database, any data in that row that is different in the CSV file is modified in the Lexia database.

**Delete Data:** If a Student/Class/Staff/School Unique ID exists in the Lexia database but not the CSV file, any data in that row is deleted from the Lexia database. Students are soft-deleted (ie, not actually removed from the database, but marked as inactive, removed from classes, and visible in myLexia in the Archive). If a class is not in the CSV file, then the class is deleted but students and staff in the class will not be deleted.

If a school is not in the CSV file, the school is not deleted. Instead, an error is generated and included in the nightly summary report, directing the Customer to delete the school via the myLexia GUI.

## Summary Reports

Immediately following the Automated Data Import update process, a summary report is emailed to the customer with the following information:

- Date and time the Automated Data Import was run
- Number of students/classes/staff/schools added
- Number of students/classes/staff deleted
- Number of students/classes/staff/schools modified
- Number of errors found in the CSV files

Note: For security purposes, the summary report does not contain any student/staff data.

Additionally, a detailed log file will be uploaded to the SFTP site logs subdirectory with the following information:

- Information from the summary report
- Detailed error information (i.e., specific rows that were not successfully imported and why).

## Exception Students, Staff, Classes, and Schools

Even when Automated Data Import is activated, you can still create students, staff, classes, and schools via the myLexia UI (user interface). All of these “exceptions” are exempt from the Automated Data Import process (i.e., they are not deleted from the Lexia database when they don’t appear in the CSV file).

In the myLexia GUI, exception students, staff, classes, and schools have the prefix EX in their Unique ID field. To view the Unique ID field, navigate to the student/staff/class/school record and view the Info section. An EX prefix to the ID in the Unique ID field keeps this record exempt from the Automated Data Import process.

- Exception students, staff, and schools can be created in the MyLexia GUI only by District Admin users. There is a site setting to disallow the creation of exception students in the myLexia Site Settings.
- Exception classes can be created in the MyLexia GUI by District Admins, School Admins, or Teachers.

To integrate exception data into the Automated Data Import process, a District Admin user can edit a record’s Unique ID field in myLexia (i.e, replace the Unique ID with valid Unique ID that matches the CSV file).

To exclude data from the Automated Data Import process, a District Admin can add a prefix of “EX” to the Unique ID.

To delete exception data from myLexia, edit the Unique ID field by removing the “EX-“ prefix. During the next Automated Data Import, this data will be deleted.

## Editing Data on the myLexia User Interface (UI)

After Automated Data Import is activated, you cannot edit any fields on the myLexia UI that are being imported.

For example, if students are imported, you cannot edit any student fields on the myLexia GUI, even if the field is optional in the CSV and does not have any values. But if classes are not imported, you can edit all class fields.

On the myLexia UI, you can edit fields if the fields cannot be imported. For example, if staff are being imported, the Orientation field may be edited because this field cannot be imported.

For Exceptions, all fields are editable, including the Unique ID.