
Setting Unique IDs in myLexia.com



Overview

This document is for customers who use Lexia's automated import process or Clever. It describes how to use the "Set Unique IDs" function in myLexia, which is necessary for setting up automated imports or Clever for the first time, and also for fixing sync errors with your imports.

What purpose does Setting Unique IDs have?

1. Setting up automated imports or Clever sync

Setting IDs is a vital part of setting up automated imports and Clever integrations. Setting unique IDs for your schools, students, staff, and/or classes will set a unique identifier for your existing accounts in myLexia.

If you have students who are currently using Lexia, it is especially important to set their IDs (RefIDs) in myLexia before activating automated imports or syncing with Clever, so that their Lexia history is preserved. Student accounts that do not have a RefID will be archived with the first automated import or Clever sync.

2. Fix sync errors with automated imports or Clever

You may also need to set unique IDs to fix sync errors -- for instance, if a student's RefID is incorrect in myLexia. The REF ID field is not editable in myLexia unless it is an exception. You may replace exception IDs (any ID that starts with EX-) with the correct ID by pasting directly into the REF ID field in myLexia. For IDs that are not exceptions, you will need to use "Set Unique IDs" to correct the ID.

Setting IDs in myLexia

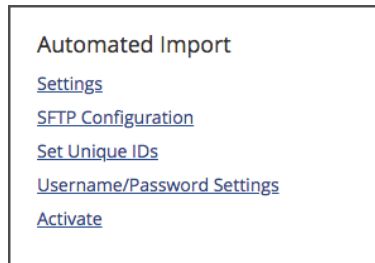
Admin access to myLexia

You will need to have administrative access to myLexia to set IDs. If you do not already have administrative access to myLexia, please share this document with an existing myLexia admin, or ask an existing admin to create an admin account for you in myLexia. If you need assistance with this step, please contact Lexia Customer Support.

Choose what type of data to import

If you are setting up automated imports or a Clever sync, first choose which types of data you will be importing. You can only set IDs for the types of data that are selected.

- In myLexia, click on Settings (the gear icon) in the lower left hand corner and choose “Settings” in the Automated Import section.



- In the General Configuration page, choose what kind of data to import:
 - Students only
 - Staff only
 - Students and staff
 - Students, staff, and classes.

Note that schools are required and are automatically checked off. Classes need to have a staff member associated with them, so if you want to sync classes, you will also need to import students and staff.

Set Unique IDs -- Prepare Files

Whether you are setting up automated imports or Clever for the first time and need to set IDs for all of your schools, students, staff, and/or classes, or whether you need to just change one ID, you will need to create a spreadsheet for each type of ID that you want to set, and upload the spreadsheet to myLexia.com.

Schools

- Prepare a .csv file with two columns: SchoolId and Name.
- In the “SchoolID” field, enter an ID for each school.
- In the “Name” field, enter the name of each school **as it currently appears in myLexia**.
- Any schools that aren’t included in the automated import will need to have a special code for their IDs. You can set a school to be an exception by making the schoolID “EXCEPTION”. Please note that “EXCEPTION” is case-sensitive.

	A	B
1	SchoolId	Name
2	12345	Anytown Elementary
3	45678	Anytown Middle School
4	EXCEPTION	Anytown School District

Students

- Prepare a .csv file with two columns: StudentId and Username.
- In the StudentID field, enter a unique ID for each student. If you use Clever, this is the student’s Clever ID. The Clever ID is a long string of numbers and letters, and looks something like this: 5616e46cf06dec3c6604d37c
- In the “Username” field, **enter the students’ current usernames in myLexia**. This may be different from your chosen username convention; the usernames will update after the first automated import sync.

	A	B
1	StudentID	Username
2	723422	Sarah.Student

unique ID

Student's current username in myLexia

Staff

- Prepare a .csv file with two columns: StaffId and Username.
- In the StaffID field, enter a unique ID for each staff member. If you use Clever, this is the staff’s Clever ID. The Clever ID is a long string of numbers and letters, and looks something like this: 5616e46cf06dec3c6604d37c
- In the “Username” field, **enter the staff member’s current usernames (email addresses) in myLexia**.
- Admins, specialists or non-classroom staff often aren’t included in automated imports or Clever syncs. You can mark staff as exceptions by giving them a special code for their

IDs. In the StaffID column, enter the word “EXCEPTION”. Please note that “EXCEPTION” is case-sensitive.

	A	B	C
1	StaffID	Username	
2	EXCEPTION	staff@anytown.org	
3	19873	staff2@anytown.org	
4	871636	staff3@anytown.org	

Set Unique IDs -- Set IDs

After you have prepared your CSV files, you can use them to set the IDs for schools and students and/or staff. Lexia Support staff can assist you with this step.

Click on Set Unique IDs in the Settings-->Automated Import section

- Select the data type -- schools, students, or staff -- of the file you are uploading.
- If you are setting IDs as part of setting up automated import or a Clever sync, you must set the IDs for schools before you set the IDs for students and staff.

Data Type

Select the data type to set unique IDs for: ☐ Schools ☒ Students ☐ Staff ☐ Classes

File

Upload your import CSV file (the file should be in the format specified in the [Automated Data Import User Guide](#)).

Set student REF ID

- Choose the file you are going to upload
- Click Set IDs
- Review the message for errors, and to see how many schools, staff, students, and classes do not have IDs and will be deactivated after the next auto import is run. Note that if you are setting up automated imports or a Clever sync, and haven't yet activated automated imports, accounts won't be deactivated until you after activate auto imports.

What happens next?

New Automated import and Clever Sync Setups

If you set unique IDs as part of a new setup for automated imports or a Clever sync, please check in with Lexia Customer Support before activating automated imports.

Fixed Incorrect RefID

If you corrected a RefID, please note that information (class assignment, school, grade, etc) will be updated in myLexia after the next nightly sync.