Instructions for Preparing for the CT-SEDS Document Repository Upload

What is a Document Repository?

A document repository is an electronic filing system within CT-SEDS that is specific to each student. All documents finalized within the system are stored as a PDF in the student repository. Districts can also upload documents into a student's repository. The student's repository moves with the student when they transfer between enrollment districts. This way a former district always has a copy of the history of a student record and a new district will have the active file that they can continue to add new documents into.

Below, we review the steps for preparation of the initial population of student documents into their individual repositories - via a batch upload process.

Prepare Files for Upload

File Formats

To import data files in CT-SEDS, districts will first need to determine which files they wish to include in the document repository for their students. Documents that would be appropriate include IEPs, Evaluation Reports, Consent Forms, etc. We recommend districts start with the most current annual review, most recent evaluation documents and most recent consent forms for each eligible student. These documents must be downloaded, scanned, or saved in one of several acceptable formats and then placed into a folder. Acceptable file formats for upload into CT-SEDS Document Repository include:

.pdf, .doc or .docx, .xls or .xlsx, .ppt or .pptx, .txt, and .rtf.

Important: no single file can be greater than 25.00 MB in size.

File Name (Document) Naming Convention

When saving documents into the folder – specific naming conventions should be followed. Start with the SASID (student's CT 10-digit 'SASID'), follow with a type of document and end with the date the document was originally created [SASID_'Description'_DATE.xxx]. For each student, the file name must be unique across all documents. For example:

1234567890_AnnualIEP_04222022.pdf
1234567890_ReEval_03152022.doc
1234567890_ReEvalConsent_04202021.txt
1234567890_AnnualIEP_04202021.pdf

**Important**: document names cannot be longer than 64 characters.

Folders

Once all documents have been saved in one of the appropriate file formats with required naming convention applied, the documents should be organized into a folder(s). There is a limit of 500MB for each zipped folder. Please keep this limitation in mind when determining how many files you will include on each Batch Upload Spreadsheet within each zipped folder for upload.

Batch Upload Spreadsheet

The next step is to create a Batch Upload Spreadsheet (excel file) that inventories each document. The Batch Upload Spreadsheet specifies the student SASID, the name of the student's associated documents, the Display Name of the document that the district would like displayed in CT-SEDS, and the date the document was generated/created. The Batch Upload Spreadsheet must be in the **.xls** format – the newer version (.xlsx) will cause the upload to fail. [*See*: Batch Upload Spreadsheet template]. Finally, the Tab in the Batch Upload Spreadsheet must be named "Document".

- How to convert your **.xlsx** file into **.xls** for upload.
    - Click on the "**SAVE AS**" option and select "**Excel 97-2003 Workbook (*.xls)**" from the drop-down menu.
    - Select the folder where you wish to save the file and confirm by clicking the **SAVE** button.
    - *Remember to delete or move the .xlsx version of the batch upload spreadsheet from the folder before "zipping".*

File name:	Document-BloomfieldBatch1.xls
Save as type:	Excel 97-2003 Workbook (*.xls)
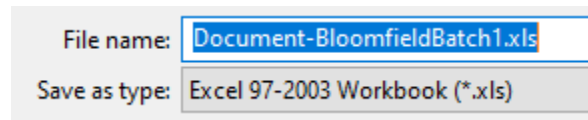
Batch Upload Spreadsheet Naming Convention

The Batch Upload Spreadsheet needs to be saved as: "Document-**[**insert District Batch#**].xls**". The naming convention of the file is critical to the success of the upload. It tells the system that documents are being uploaded, the district uploading the documents, and the number of the batch being uploaded. For example, a large district may choose to upload one batch per school, while a small district may be able to only provide one upload with all necessary documents for each student.

- How to Name the Batch Upload Spreadsheet:
    - Document-BloomfieldBatch1.xls
    - Document-BloomfieldBatch2.xls

Sample Batch Upload Spreadsheet

Inside the Batch Upload Spreadsheet, the following data must be provided

StudentCode	FileName	DisplayName	DateGenerated
1234567890	1234567890_AnnualIEP_06152022.pdf	IEP 2022	06/15/2022
1234567890	1234567890_ReEval_05152020.pdf	Revaluation 2020	05/15/2020
1234567890	1234567890_AttendWaiver_06152022.pdf	Attendance Waiver 2022	06/15/2022
1234567890	1234567890_Manifestation_03022022.pdf	Manifestation Determination Form	03/02/2022
8650815604	8650815604_ProvisionSpecialEd_09012018.pdf	Consent for Provision of Special Ed 2018	09/01/2018
8650815604	8650815604_Medicaid_09012018.pdf	Medicaid Consent Form	09/01/2018
8650815604	8650815604_IEP_09012018.pdf	IEP 2018	09/01/2018
8650815604	8650815604_ ReevalConsent_08222020.pdf	Consent of Reevaluation	08/22/2020
8650815604	8650815604_IEP_06102021.pdf	IEP 2021	06/10/2021
8650815604	8650815604_PPTInvitation_05202022.pdf	PPT Meeting Invitation	05/20/2022
8650815604	8650815604_IEP_06082022.pdf	IEP 2022	06/08/2022

Explanation of each Field in Batch Upload Spreadsheet:

Headers – each of the headers listed here need to be listed in the file with the **exact** header name. Capitalization and absence of spacing is important or the import will not work.

- StudentCode – **must be the Student's CT 10-digit 'SASID'**
- FileName – Exact name of the file that is going to be uploaded to the student's record
  - Must include the SASID, the file descriptor, the original creation Date of the Document, and the **type of file** (for example: ".pdf")
  - Maximum 64 characters
  - Must be unique across all documents
    - Student may have 3 IEP documents, but each would require a different date, or the upload would fail.
- DisplayName
  - The Display Name will be used when displaying a list of documents in the student's Document Repository in CT-SEDS.
    - This field allows a user to easily identify a document. We suggest including the year or other helpful (yet succinct) information to explain to the user the contents of the document.
  - Maximum 64 characters
- DateGenerated
  - Add the date the document was originally created, using the DD/MM/YYYY format (e.g., if you pdf the consent for reevaluation the parent signed on 8/22/2020, the date generated would be 8/22/2020). **Forward slashes (/) are Required**.
  - This date will also display in the student's Document Repository and can be used to sort documents.

Create Zip File Folder

Once you have all files prepared, including the Batch Upload Spreadsheet (in.xls format), and **stored in a single folder** – next create a Zip file. A single Batch Upload Spreadsheet is required for each zipped folder. **Important**: Do NOT password protect the zipped file or any of its contents.

How to Create a Zip File Folder:

1. Use "Windows Explorer" or "My Computer" ("File Explorer" on Windows 10) to **locate the folder** containing the files you wish to Zip.
2. Hold down [Ctrl] on your keyboard and Click the folder you wish to zip.
3. Right-click and select "Send To"
4. Choose "Compressed (Zipped) Folder."
5. Name the zipped folder

All files in your folder will be combined into a single folder with a **zipper icon** on it. (see below)
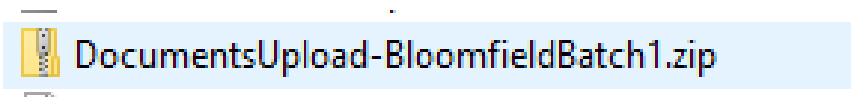
Below is a sample of the contents of the Zip file.

Name	Type	Compressed size	
1234567890_AnnualIEP_06152002.pdf	Microsoft Edge PDF Docu...	2,584 KB	
1234567890_AttendWaiver_06152022.pdf	Microsoft Edge PDF Docu...	2,584 KB	
1234567890_Manifestation_03022022.pdf	Microsoft Edge PDF Docu...	2,584 KB	
1234567890_ReEval_05152020.pdf	Microsoft Edge PDF Docu...	2,584 KB	
Document-BloomfieldBatch1.xls	Microsoft Excel 97-2003 ...	15 KB	

Once a district has all its documents saved with the proper naming conventions, reported on the Batch Upload Spreadsheet, and prepared in a Zip File, you are ready to upload into CT-SEDS.

> **Important**: Zipped folders containing student files and the Batch Upload Spreadsheet can be **no larger than 500mb**.

Uploading into CT-SEDS July 2022

Instructions on how to upload into CT-SEDS and how to get assistance with this process will be provided when CT-SEDS is live in July 2022.