

CALynx Mass Upload Guide v1.0

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When should I use the mass upload template?

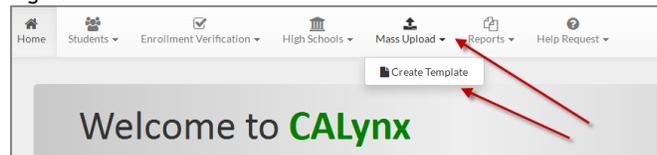
If your program is reporting 100 or more students, you have the option of using the mass upload method to upload all your students' data into CALynx. Please contact the Research and Data Analyst, Joanne Lacsina, at jlacsina@collegeaccessfoundation.org to confirm that this method is appropriate for your program to use. Once confirmed, the mass upload feature will become available directly in CALynx.

Note: If you choose this method, please make sure to check the data deadline for batch upload users as mass upload users are required to submit data at an earlier date. For AY2014-15, the data deadline for mass upload users is Friday, January 9th.

How do I create a mass upload template?

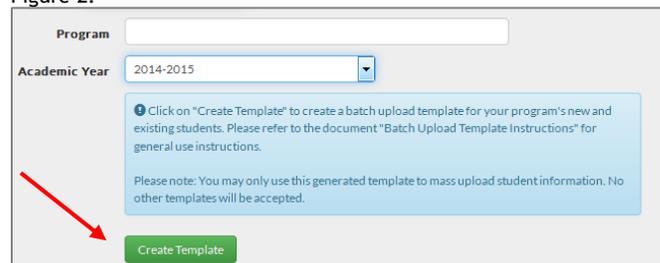
From the toolbar, scroll over "Mass Upload." A dropdown will appear where you can then click on "Create Template." See Figure 1.

Figure 1.



Once you click on "Create Template," a new page will open up where you can then click the "Create Template" button to generate a mass upload template in Excel for your program. See Figure 2.

Figure 2.



The image shows a web form with the following elements:

- A text input field labeled 'Program'.
- A dropdown menu labeled 'Academic Year' with '2014-2015' selected.
- A blue informational box containing text: 'Click on "Create Template" to create a batch upload template for your program's new and existing students. Please refer to the document "Batch Upload Template Instructions" for general use instructions. Please note: You may only use this generated template to mass upload student information. No other templates will be accepted.'
- A green 'Create Template' button at the bottom.

 A red arrow points to the 'Create Template' button.

Note that the only mass upload template that your program can use is the template generated via CALynx. Please do not use any other version of the mass upload template.

How do I add a new student record?

At the bottom of the Excel template you will see two tabs: “Existing Students” and “New Students.” The “Existing Students” tab contains students that have already been reported by your program in prior years. The “New Students” tab is for completely new students whose records do not exist in CALynx.

In row 1 of each column will be the field names that your program may report. Please use the drop downs for easy entry when available. Please fill in ALL required columns prior to submitting your mass upload template back to the Foundation. Note that required and optional fields are not labeled in the template. For a description of required fields, please refer to the “Guide to College Access Foundation Scholarship Student Data Collection.”

Note that if required fields are missing for any student, that student’s data will NOT be uploaded into the system. Any student’s data not successfully uploaded into CALynx will need to be manually entered into the system.

Can I edit an existing student’s demographic information in the mass upload template?

You may edit/update an existing student’s demographic information directly in the mass upload template EXCEPT FOR the student’s name, date of birth, and high school. If you need to update any of these fields, they must be edited directly in CALynx.

How do I add current year financial aid information to an already existing student?

Click on the “Existing Students” tab and search for the student you are going to report on for the current academic year. In row 1 of each column will be the field names that your program may report. Please use the drop downs for easy entry when available. Please fill in ALL required columns prior to submitting your mass upload template back to the Foundation. Note that required and optional fields are not labeled. For a description of required fields, please refer to the “Guide to College Access Foundation Scholarship Student Data Collection.”

Note that if required fields are missing for any student, that student’s data will NOT be uploaded into the system. Any student’s data not successfully uploaded into CALynx will need to be manually entered into the system.

Note that if you see that the student “is shared” with another program, then you have to enter this student manually on CALynx. See Figure 3.

What does it mean when a student is shared? Can I upload data for them still?

A shared student is a student that is in the system for more than one CAFC grantee. If your student is a shared student, you cannot upload data for the student. All shared students must be entered manually.

Figure 3.

1	Is Shared	Ready to Upload?
2	N	Y
3	N	Y
4	N	Y
5	N	Y
6	Y	N
7	Y	N
8	N	N
9	N	N
10	N	N

How can I tell if a new student is shared with another grantee?

If you are entering data for an existing student in the “Existing Students” tab, column A will contain a “Y” if that student is shared. See Figure 3. Data for shared students can only be manually entered into CALynx.

If you are entering data for a completely new student into the system in the “New Students” tab, you will not be able to tell if that student is shared. Once you submit your data, the Research and Data Analyst will send you a review of which students were successfully uploaded and which were not. Any shared students will be included in this review.

What is the “Ready to Upload” column?

The “Ready to Upload” column indicates that the row of data (that is, a student’s information) is ready to be uploaded into CALynx. Be sure to change the “N” to “Y” for each student that you are reporting on. See Figure 4. If you do not change the dropdown to read, “Y,” that row will not be uploaded.

Note that if the student is shared, the student’s data will NOT upload into the database even if the “Ready to Upload” column has a “Y” in it.

Figure 4.

1	Is Shared	Ready to Upload?
2	N	Y
3	N	Y
4	N	Y
5	N	Y
6	Y	N
7	Y	N
8	N	N
9	N	N
10	N	N

Can I copy and paste student information into the template from other spreadsheets?

No. Please do not copy and paste data into the template. Doing so will cause problems with the upload, and no data will be uploaded into the system. If this happens, the file will be sent back to you and you will need to re-download a new mass upload template and re-enter all information.

How do I submit the template to CAFC?

Please send the completed template to the Foundation via our HighTail secure server link: <https://www.hightail.com/u/CollegeFutures>.

Also note that your program may submit only ONE mass upload template that is complete with all students’ data.

When will I see my students in my reports or online?

Once the data has been submitted to the Foundation the data will be reviewed by the Research and Data Analyst. Once it is accepted and uploaded into CALynx, your program will be notified.

Please allocate about two weeks from time of submission via the secure server link to view your students’ data in CALynx.

How do I correct a student record after I have submitted the student in the mass upload template?

After you submit your data via mass upload, any corrections must be made directly in CALynx once they are properly uploaded into the system

If a new student did not upload successfully, you may add this student into CALynx by logging into CALynx and clicking “New Record” from the drop down list that appears under the “Student”

icon on the navigation bar at the top of your screen. You may also click “Add” in the Students panel in the middle of the screen. Both links will take you to the “New Student” page.

If your student already has current year information in the Foundation’s database, you may select “Modify Student” from the dropdown list that appears under the “Student” icon on the navigation bar at the top of your screen. You may also click “Modify” in the Students panel in the middle of the screen. Both links will take you the list of students that have current year information and from there you can modify the record and hit “save”.