Guide to Completing a Bulk User Upload

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Steps to complete a bulk upload:

1. Download the bulk upload template.

2. Complete the Required Information and Required for Staff & Administrators sections. See below for descriptions of each field.

   a. License

   b. Last Name

   c. First Name

   d. Username

   e. Password

   f. Role

   g. Email (required for Admin and Staff)

3. Return the completed sheet to support@pathful.com

4. Wait for confirmation from the Pathful Support Team that your bulk upload is complete

Descriptions of fields for Bulk Upload Template

Required Information Fields:

a. License - The school or organization name you use to login to Pathful

b. Last Name - Last name of individual

c. First Name - First name of individual

d. Username - Must be unique to the license. Email is suggested.

e. Password - Case sensitive. Does not have to be unique.

f. Role -

i. User- student, learner

ii. Staff- Can create both student and staff accounts. Cannot create administrator accounts.

iii. Administrator- Can create student, staff, and administrator accounts.

g. Email - *Only required for staff and admin accounts. Use the individual's school or organization email. If unavailable, a personal email may be used, though it is not recommended.

Optional Information Fields:

h. Grade - Please provide the grade as a number only. Our system will automatically convert the grade level to a graduation year, ensuring it updates as the student advances. Options: K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12

i. Unique ID - Serves as a unique identifier for the user. You can use either the student ID number or email address.

j. Group - This enables us to create Groups during the bulk upload process. In our system, each Group must have a Group Owner who can edit the Group within the platform. Unless specified otherwise, we will assign the person requesting the bulk upload as the Group Owner.

k. Credentials Email - When you enter the email address of the individual user in this column, the system will automatically send them an email with their login credentials.