Rostering via spreadsheet

For schools and districts that do not use an automated service like Clever or ClassLink, FL4K provides a straightforward spreadsheet-based rostering system. This guide will walk you through the process of setting up your initial roster.

Receiving a spreadsheet template

To begin the spreadsheet rostering process, please contact your FL4K representative. As part of your request, you'll need to provide the full list of administrators and instructors who require access to view and edit the roster spreadsheet.

> **This spreadsheet will contain personally identifiable student information. Please ensure your list of authorized users is accurate and that you take all necessary security precautions to prevent unauthorized access.**

Once we receive your list of authorized users, we'll create and share your school's unique rostering spreadsheet directly with that group.

> **This option is only available for schools with an active FL4K subscription. Spreadsheet rostering is not supported for automated free trials.**

Filling out the spreadsheet for the first time

Alright, let's dive in. Your spreadsheet can have up to four tabs to fill out. Don't worry if you don't see all of them — it just means we've already given you a head start by pre-filling some information for you. Here are the tabs you'll be working with:

- `schools`
- `teachers`
- `classes`
- `students`

The `schools` tab

First up, the `schools` tab! On this tab, list the full name of every school in your district that will be using FL4K. Each school needs its own row in the `NAME` column.

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> No `schools` tab visible? **You can skip this step! It just means we've already handled it for you.**

What if schools are already listed?

You might see that we've given you a head start by pre-filling some schools. Here's how to handle that:

- For new FL4K schools: **We've pre-filled this list based on our conversations. Feel free to add new schools, remove any that won't be using FL4K, or change the names to your preference.**
- For returning FL4K schools: **Welcome back! The schools listed are based on what's in our system from the previous year. You can add new schools or remove any that are no longer participating.**

> Heads up for returning schools: **To avoid creating duplicate schools in our system, please do not simply edit the name of an existing school in the spreadsheet. If a school's name needs to be updated, please make a note and tell us when you return the file. We'll happily update it on our end!**

> **If present, make sure to remove the placeholder row that contains the text `(DELETE THIS ROW)`!**

> □□ Good news: no per-school fees! **Feel free to add as many schools as you need. Unless specified otherwise in your quote, our subscriptions aren't priced per-school, so you won't see any extra charges.**

The `teachers` tab

Next up, the `teachers` tab. This is where you'll list your whole crew: any instructors, school staff, or administrators who need access to FL4K.

What if teachers are already listed?

You might see that we've given you a head start by pre-filling some users. Here's how to handle that:

- For new FL4K schools: **We've pre-filled this based on our conversations. Please double-check that the information is correct, make any necessary changes, and add the rest of your team.**

- For returning FL4K schools: **Welcome back! These are your users from last year. Feel free to add new staff or remove those who no longer need access.**

> Heads up for returning schools! **To avoid creating duplicate accounts, please do not change an existing user's information directly in the spreadsheet. If a returning user's details need an update, please make a note and tell us when you send the file back. We'll take care of it for you!**

> **If present, make sure to remove the placeholder row that contains the text `(DELETE THIS ROW)`!**

> More good news! **Just like with schools, we don't charge per-teacher or per-admin unless specified in your quote. Add everyone who needs access!**

Column: `FIRST` (first / given name)

This one's easy! Just enter the first name for each instructor, staff member, or admin.

- **This isn't required, but it's highly recommended so you can easily identify users.**
- **If you provide a first name, that's what will appear next to the user's avatar inside the FL4K platform.**

Column: `LAST` (last / family name)

Enter the last name for each user here.

- **This is also recommended but not required.**
- **If you leave the `FIRST` name blank but fill this in, the user's last name will be what shows up next to their avatar.**

Column: `EMAIL`

This is an important column! It serves as the unique email and username for each teacher or admin.

- **Required. Every user needs a unique email to log in.**
- **Max length: 255 characters.**

> **Please enter the values for this column in all-lowercase. (This isn't a hard requirement, but a way to help keep things organized and detect duplicate entries!)**

Column: `SCHOOL NAMES (semicolon-separated)`

This is where you tell us which school(s) an instructor belongs to. If you only have one school, this is easy! If your district has multiple schools, pay close attention here.

> **The school name(s) you enter here must exactly match the names you listed on the `schools` tab. Copy and paste (or, even better, absolute references) are your friend!**

- Got a teacher in multiple schools? **Just separate the school names with a semicolon and a space `; ` like this: `Sample Elementary School; Sample Middle School`.**
- What about district admins? **You can usually leave this column blank for district-level administrators. They automatically get access to see everything!**
  - **The only exception: If a district admin is *also* the main teacher for a specific class, you should list that class's school here for them.**

A note on school-level admins

> **Need to create an admin for just one or some schools (but not the whole district)? Our spreadsheet system doesn't support this directly yet.**
> Workaround: **Roster them as a regular teacher and assign them to the correct school(s) in this column. Then, just make a note or send us an email when you return the spreadsheet, letting us know which user needs school-admin privileges. We'll handle the rest!**

Column: `IS DISTRICT ADMIN`

Check ☑ the box on the spreadsheet for a user who should be able to oversee student progress and rosters across all schools and classes.

> Reminder: **If a district admin also teaches a class, make sure their school is listed in the `SCHOOL NAMES` column for them.**

> **See above regarding the workaround for creating *school*-level admins.**

? How is a teacher's default curriculum assigned?

When a new teacher's account is created, the system looks at the list on the `classes` tab to see which class appears first for that teacher. The curriculum associated with that first class becomes the teacher's default view when they log in. However, teachers can easily change their own curriculum view at any time from their dashboard or overview page.

The `classes` tab

Time to set up your classes! Every class that will use FL4K should be listed here.

What if classes are already listed?

We may have pre-filled some classes for you based on our previous conversations or last year's roster. Please review the list to make sure it's accurate, adding or removing classes as needed.

> 💸 No per-class fees! **Unless specified in your quote, feel free to add as many classes as you need without extra charges.**

> A note on teacher access: **As long as a teacher is on the `teachers` tab, they will have FL4K access. They only need to be listed here if they are an instructor for a specific class.**

> **If present, make sure to remove the placeholder row that contains the text `(DELETE THIS ROW)`!**

Column: `NAME`

Enter the official name for the class.

- **To avoid confusion, class names must be unique across the whole district.**
  - **This means that `Spanish Grade 4` at school A and `Spanish Grade 4` at school B should have different names (e.g., `4th Grade Spanish - Elm St` and `4th Grade Spanish - Oak Ave`).**
- **If your classes are primarily separated by grade level, we recommend including the grade in the name of the class.**
- **Max length: 255 characters.**

Column: `TEACHER EMAILS (semicolon-separated)`

List the email address of every instructor for the class.

- **Every class must have at least one teacher listed.**
- **If the class has multiple instructors, just separate their emails with a semicolon and a space `; `. For instance: `ajawilson@sample.edu; breannastewart@sample.edu`.**

Column: `SCHOOL NAME`

Most of the time, you can leave this column completely blank. We only need you to fill this in if any instructor listed for the class (in the `TEACHER EMAILS` column) is a member of more than one school. This tells us exactly which school this specific class belongs to.

> **Remember to match the name from the `schools` tab exactly, and make sure that all listed instructors (both teachers and district admins) are members of the school.**

Column: `CURRICULUM`

> **You might not see this column, and that's perfectly okay! We only make this column visible for schools that are using multiple FL4K curriculums and have already discussed the different options with our team to make sure you're comfortable choosing the right one for each class / student.**

If the column is visible, you can use it to assign a specific curriculum to this class. Here's how it works:

- ➡ If you enter a curriculum name here: **New students in this class will automatically be assigned this curriculum when their accounts are created.**
- ➡ If you leave this blank: **Students will simply be assigned your school's / district's default curriculum. You can always change this for individual students later on.**

The `students` tab

Almost there! This is the final and most important tab. Here, you'll list every student who needs access to the FL4K platform.

> **If present, make sure to remove the placeholder row that contains the text `(DELETE THIS ROW)`!**

Column: `FIRST` (first / given name)

Enter each student's first name here. While this column is technically optional, providing a first name helps you easily identify students on your gradebook and in reports. Whatever you enter here is what will appear next to the student's avatar inside the FL4K platform. You can include middle names here as well, if you wish.

Column: `LAST` (last / family name)

This column is optional. For student privacy, many schools choose to either leave this blank or enter only the student's last initial. The last name you enter here is primarily for your internal reports and to help tell students with the same first name apart.

If a student's `FIRST` name is provided, that is what will always appear next to their avatar. The `LAST` name will only be displayed if the `FIRST` name field is left blank.

Column: `USERNAME`

> **This column is optional, and most schools choose to leave it blank. If you do, we'll automatically generate a unique username for each student (based on their name or other factors). This is the simplest and recommended approach!**

If you have a specific username system you'd like to use, you can enter the desired username for each student here. Just be aware that usernames must be unique across the entire FL4K platform. If the username you request is already taken, we'll assign a similar one (like `jdoe2` instead of `jdoe`).

> **Please enter the values for this column in all-lowercase. (This isn't a hard requirement, but a way to help keep things organized and detect duplicate entries!)**

Column: `EMAIL`

While this column is not required, we strongly recommend it. We use email as a unique identifier to ensure that a student who changes their name or moves between classes during the year is recognized as the same person, preventing duplicate accounts and preserving their progress. As a bonus, any student with an email on file can use it to log in, which is often easier for them to remember than an auto-generated username.

> **Please enter the values for this column in all-lowercase. (This isn't a hard requirement, but a way to help keep things organized and detect duplicate entries!)**

> **We never attempt to contact student emails for any reason. They are used for sign-on and rostering purposes only.**

Column: `CLASS NAMES (semicolon-separated)`

This is how you place students into their classes. While a student account can exist without being enrolled in a class, this column is essential. Without it, teachers and administrators will have no way to view that student's progress or manage their settings.

To enroll a student in a single class, simply enter the class name exactly as it appears on the `classes` tab. If a student is in multiple classes, just separate the class names with a semicolon and a space (e.g., `4th Grade Spanish; 4th Grade Art`).

>

> **Students will automatically be enrolled in the school associated with each class you list. There's no need to manage school enrollments separately on this tab.**

Column: `TEACHER EMAIL`

You can leave this column blank. This column is only necessary if class names across the district are *not* unique. However, as it is now required that all class names be unique, this column is no longer necessary.

Column: `CURRICULUM`

You might not see this column, and that's perfectly okay! We only make this column visible for schools that are using multiple FL4K curriculums and have already discussed the different options with our team to make sure you're comfortable choosing the right one for each class / student.

This column gives you the power to assign a specific curriculum to an individual student, overriding the default you may have set on the `classes` tab. If you leave this column blank for a student, they will simply be assigned the curriculum that's set for their class (or the district-wide default). Most schools leave this blank unless they have a specific need to differentiate for an individual student.

Finalizing and submitting your roster

You've made it to the final step! Once you've filled in all the necessary information on the `schools`, `teachers`, `classes`, and `students` tabs, it's time to double-check your work and send it over to us.

?? Before you submit: a quick checklist

To ensure a speedy setup, please run through this quick checklist:

- **Have you removed all placeholder rows, like the ones containing `(DELETE THIS ROW)`?**
- **Is every class name unique across the entire district? This is a common point of error!**
- **Does every class on the `classes` tab have at least one teacher assigned to it?**
- **Is every student on the `students` tab assigned to at least one class?**

Submitting your spreadsheet and next steps

1. Notify us by email. **Once you're confident the spreadsheet is complete and accurate, please send an email to your FL4K representative. In this email, please be sure to tell us the date(s) by which your users will need access (unless you already specified this information in the Google form).**

- **If different roles need access at different times, please specify (e.g., “We need administrators to have access by August 15th, and all teachers and students by August 25th.”).**

2. We process your roster. **We’ll perform the initial rostering attempt within ten days of receiving your email. We will notify you as soon as your accounts are ready or if we encounter any issues.**
3. Error handling: **if our system detects an error during the import (like a student assigned to a non-existent class), the entire process will pause to prevent data inconsistencies. We’ll reach out to you immediately with details about the error so you can correct the spreadsheet and resubmit it.**

?? Heads up! Avoid duplicates and delays

> **Our rostering system is most effective when it receives complete and final information. Submitting a spreadsheet with placeholder data or making changes after the initial import can cause significant issues, such as creating duplicate accounts, if not done with care.**

Please do not **submit your roster until all information is finalized. It’s better to omit a student or teacher entirely and add them later than to submit incomplete data. For example:**

- **If you create a student without an email and we roster them, and then you later add their email while also fixing a typo in their name, our system will likely create a brand new, duplicate account for that student.**
- **Some fields, like the `USERNAME` and `CURRICULUM` fields, are only used when an account is first created. Updating them in the spreadsheet after a user has been rostered will have no effect.**

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