# QUICK GUIDE

## Creating and Uploading Data Files Manually

Manually load data into *easyCBM* or provide data to Riverside Insights SFTP in comma-separated value (`.csv`) format.

### Create Data Files

Data for the three files (`1_users.csv`, `2_students.csv`, and `3_teacher_students.csv`) are typically gathered from a Student Information System (SIS) or another database program. All files must include the header row and be saved with a `.csv` extension.

**To create a data file:**

1. Create a new file in Microsoft Excel or use the file templates under Resources/Head Admin Resources.
2. If creating a file and not using the template, type the required header row as shown in the table below, using the exact characters (underscores and case, for example) and the exact order of fields.

| Column | 1_users.csv | students.csv | 3_teacher_students.csv |
|---|---|---|---|
| A | Employee_ID | StudentID | EmployeeID |
| B | Username | Date_of_Birth | StudentID |
| C | Password | Last | |
| D | Email | First | |
| E | Last_Name | Grade | |
| F | First_Name | Building_Name | |
| G | Building_Names | Gender | |
| H | User_Type | SPED | |
| I | | Ethnicity | |
| J | | Race | |
| K | | Ell | |
| L | | District_Data_1 | |
| M | | District_Data_2 | |
| N | | District_Data_3 | |
| O | | District_Data_4 | |
| P | | District_Data_5 | |
| Q | | Password (optional) | |

3. Type data into the empty cells below the field names, following the accepted data formats **exactly**. See “Acceptable Data Formats,” beginning on the following page, for a list of accepted formats.
4. When you have finished adding data to the template, click **File**, and then click **Save As**.
5. Select a location to save the file.
6. In the **File name** box, type a name for the file using the following convention: `1_users.csv`, `2_students.csv`, `3_teacher_students.csv`.
7. In the **Save as Type** drop-down box, select **CSV (Comma delimited)**.
8. Click **Save**.

**Note:** You can save an additional version with today’s date appended to the file name (for example, `2_users_07222024.csv`) to keep a historical record.

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## Acceptable Data Formats

The table below lists acceptable formatting for all data fields in the .csv files. Note the following abbreviations that appear in the **Type** column.

- A = alpha and any ASCII 7-bit non-numeric characters are allowed in the field
- N = numeric characters only are allowed in the field
- A/N = alpha, numeric, and any 7-bit ASCII non-numeric characters are allowed in the field

### *1_users.csv Formats*

| Field Name | Field Name Description | Type | Valid Values |
|---|---|---|---|
| Employee_ID | Unique identifier associating students with teachers<br>• Maps each particular student to his or her homeroom teacher. When a teacher logs on, the class list is composed of students associated with the teacher's Employee_ID.<br>• For other users who are not directly associated with a student (most Building- and District-level users), unique fictitious IDs may be used.<br>• If pre-appended zeros are used, they should be used consistently for the Employee_ID in all files. | A/N | 0–9, A–Z, including 7-bit ASCII characters |
| Username | Unique identifier (for example, an email username) for the user. Employee_ID and Username may be the same for the same user. The Username will be used by students to log in. | | |
| Password | Simplify initially for ease in distribution | | |
| Email | Used by system for self-serve password resets | | |
| Last_Name | User last name, displayed for other users but not students | A | A–Z, including 7-bit ASCII characters |
| First_Name | User first name, displayed for other users but not students | | |
| Building_Names | Full text string, with semicolons separating multiple building associations (for example, Armond Academy; Jefferson Academy) | A/N | 0–9, A–Z |
| User_Type | • Teacher-level users (typically teachers and assessors) can view students listed on the 3_teacher_student.csv association file.<br>• Building users (typically building test coordinators) can view classroom, teacher, and student information for a specific building(s) with which the user is affiliated.<br>• District users (typically district test coordinators) can view building, teacher, and student information at all schools within the district.<br>• Head Admin users (typically district data warehouse administrators) can create user accounts and student rosters, associate teachers and students, and manage system-wide settings for the district. It is recommended to limit the Head Admin to 2–3 users. One of the users should be whomever uploads these files. | N | Teacher Level = 1<br>Building Level = 2<br>District Level = 3<br>Head Admin Level = 4 |

## 2_students.csv Formats

| Field Name | Field Name Description | Type | Record Value and Description |
|---|---|---|---|
| StudentID | Unique ID for student; all data keyed from this ID. Recommend using a district-controlled ID to update records quickly and consistently. | A/N | 0–9, A–Z |
| Date_of_Birth | Student date of birth | N | mm/dd/yyyy, for example, 01/06/2008<br>Include slashes<br>January = 01<br>February = 02<br>March = 03<br>April = 04<br>May = 05<br>June = 06<br>July = 07<br>August = 08<br>September = 09<br>October = 10<br>November = 11<br>December = 12<br>Day = 01 to 31<br>Year = Each position 0–9 |
| Last | Student last name | A | A–Z, including 7-bit ASCII characters |
| First | Student first name (this is what the student selects when testing online). Consider preferred name, if available. | | |
| Grade | K, 1–8 | N | K–12, for example:<br>K or KG = Kindergarten,<br>1 or 01 = Grade 1, etc. |
| Building_Name | Used for building-level reports. Students can be associated with only one building, and building name must be consistent with the building name in the 1_users.csv data file. | A/N | 0–9, A–Z |
| Gender | Information used for research and development and to build a better system. These fields are required to have non-blank values. | A | Female = F<br>Male = M<br>Unidentified = X |
| SPED* | Information used for research and development and to build a better system. These fields are required to have non-blank values. | | Yes = Y<br>No = N |
| Ethnicity* | Information used for research and development and to build a better system. These fields are required to have non-blank values. | | Hispanic/Latino<br>Not Hispanic/Latino |
| Race* | Information used for research and development and to build a better system. These fields are required to have non-blank values. | | American Indian or Alaskan Native<br>Asian<br>Black or African American<br>Native Hawaiian or Other Pacific Islander<br>White<br>Two or More Races |
| ELL* | Information used for research and development and to build a better system. These fields are required to have non-blank values. | | Yes = Y<br>No = N |
| District_Data_1 to District_Data_5 | Optional data fields for district use; these fields are included in the data export file. | A/N | 0–9, A–Z |
| (optional) Password | Student password for online testing; student password adds another required field for students to take the test online. | | |

*NA can be used as a marker if you do not wish to include this information.

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## *3_teacher_students.csv Formats*

**Important:** Both Employee_ID and StudentID must exist in *easyCBM* before uploading this file.

| Field Name | Field Name Description | Type | Record Value and Description |
|---|---|---|---|
| Employee_ID | Unique identifier associating students with teachers<br>• Employee_ID maps each particular student to his or her homeroom teacher. When a teacher logs in, the class list is composed of students associated with the teacher's Employee_ID.<br>• For other users who are not directly associated with a student (for example, most Building and District-level users), use the Employee_ID created in csv user file 1.<br>• If pre-appended zeros are used, they should be used consistently for the Employee_ID in all files. | A/N | 0–9, A–Z, including 7-bit ASCII characters |
| StudentID | Unique ID for student; all data keyed from this ID. Recommend using a district-controlled ID to update records quickly and consistently. | N | nnnnn, for example: 13579 |

## Upload Users Files

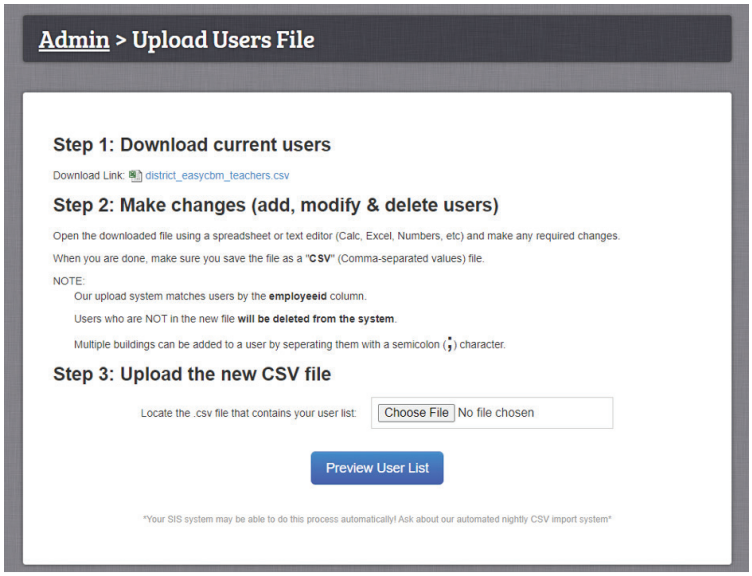
The **Upload Users File** option allows you to process several user accounts at once (for example, creating new or editing existing accounts) by uploading a properly formatted data file in comma separated values (.csv) format.

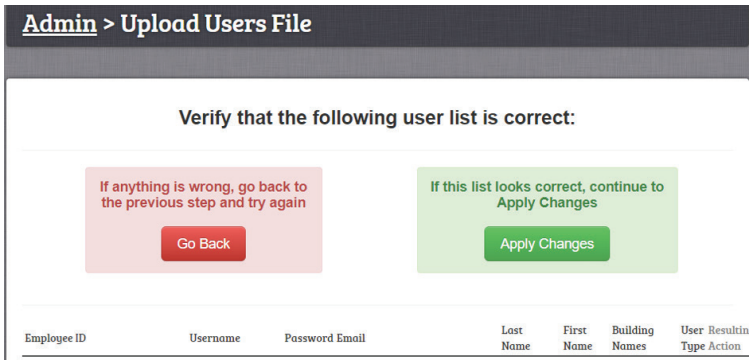
All users who are accessing *easyCBM* need to be included in the file. If a user is not on the file, who was previously in the system, they will be removed. The passwords will not change if the account already existed.

**To upload a users file:**

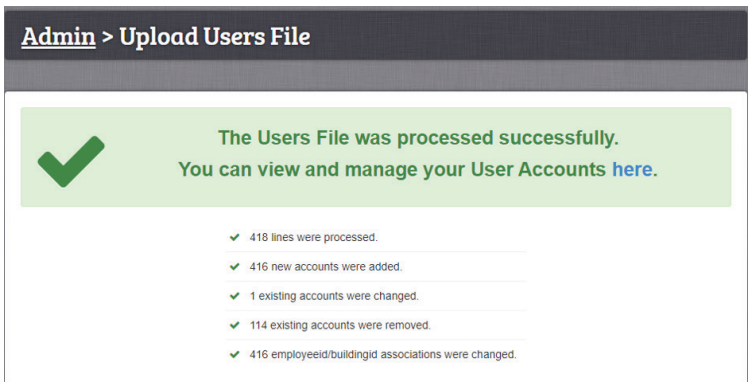
1. From the **Admin** page, click **Manage User Accounts**. The **User Accounts** page opens.
2. Click **Upload Users File**. The **Upload Users File** page appears.
3. At Step 3, click **Choose File**. Select the data (.csv) file you want to upload.
4. Click **Preview User List**. If there are any errors, an error message will appear and ask you to go back, and the file is not uploaded. If the image to the right appears, the file was accepted. Any changes made to user data will appear in the last column under Resulting Action. A change is highlighted in yellow, anyone added indicated ADD and anyone no longer on the file is marked REMOVE.
5. Review each line of the preview. If no corrections are required, then continue to Step 6.

   If corrections are required, click **Go Back**. Return to the .csv file and update the file accordingly. Repeat Steps 3–5.



6. Click **Apply Changes**. A confirmation message appears and informs you that the file has been successfully updated.
7. (*Optional*): To view all user accounts associated with the district, click the **here** link in the confirmation message. To edit an account, click the **name** link and then update any changes and click **Update Account**.




## Upload Student Roster Files

The **Upload Student Roster File** option allows you to process several student accounts at once by uploading a properly formatted data file in comma separated values (.csv) format. Be sure the file includes **all** students within the district.

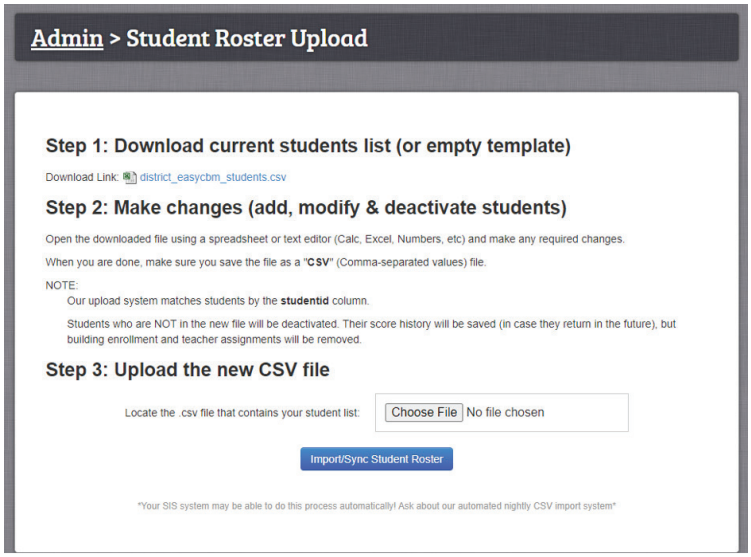
**Important:**

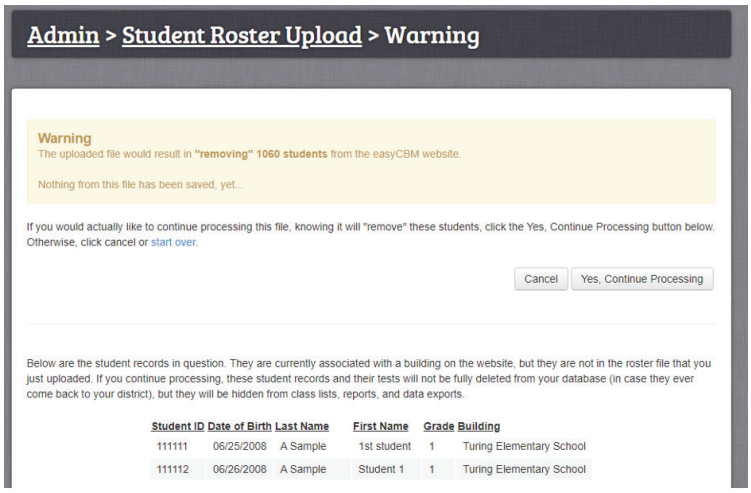
* To maintain a record of all students and their scores from previous years, districts should export the previous year's Benchmark and Progress Monitoring reports.

* On July 1, *easyCBM* rolls over to the new school year. To see previous reports for prior years, a new student file needs to be uploaded with the student's current grade level.

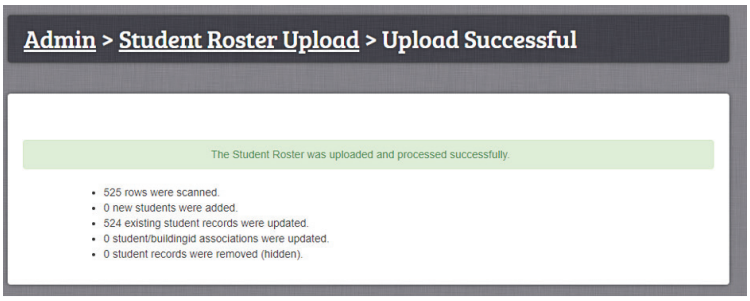
**To upload a student roster file:**

1. From the **Admin** page, click the **Upload Student Roster** file link.
2. In Step 3, click **Choose File**. Select the data (.csv) file you want to upload.
3. Click **Import/Sync Student Roster**.
   - If there are no errors, then the **Upload Successful** page appears.
   - A Warning appears if verification is needed. For example, removing students from a building who are not in the roster file that was uploaded.



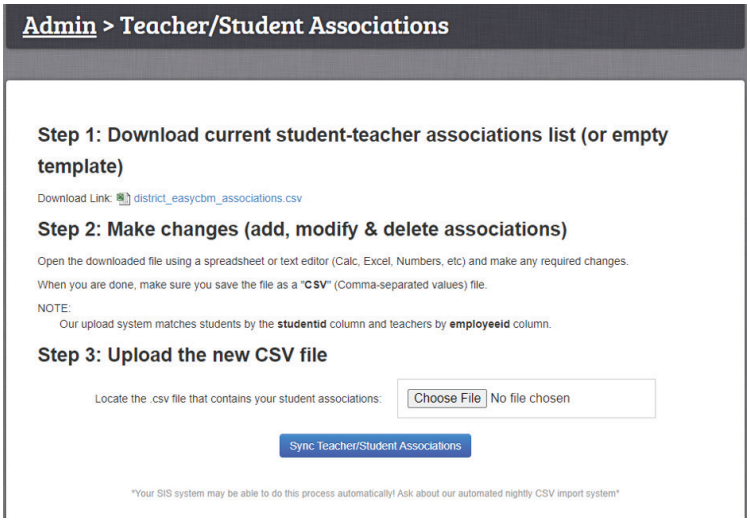
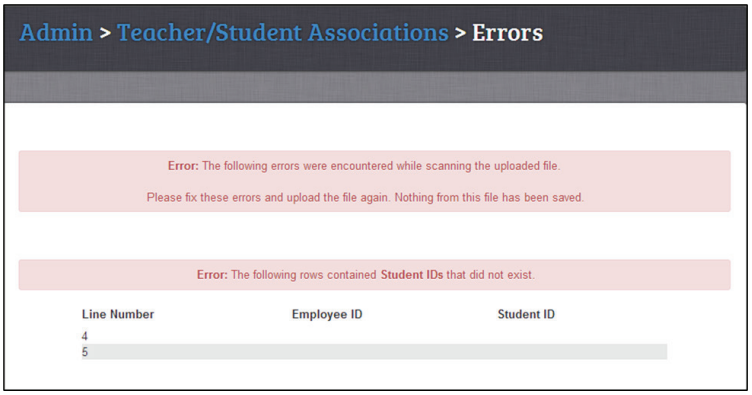



- If you would like to continue processing, knowing of the Warning mentioned, click **Yes, Continue Processing** to continue processing the file. The **Upload Successful** page appears.
- If the Warning in question needs attention, click **Cancel**. The **Student Roster Upload** page appears. Make the changes needed. Repeat Steps 1–3.




## Upload Teacher–Student Associations Files

The teacher–student associations file (3_teacher_students.csv) associates students to teachers and supports a many-to-many relationship, as both employee IDs and student IDs can appear multiple times. This file must use the same employee IDs and student IDs as other files (that is, 1_users.csv and 2_students.csv). This file typically requires updating in order to synchronize with the student roster file, particularly in the beginning of the school year to represent changes from the previous school year.

**To upload a teacher–student associations file:**

1. From the **Admin** page, in the **Student Records** section, click **Upload Teacher/ Student Associations**. The **Teacher/Student Associations** page appears.
2. In Step 3, click **Choose File**. Select the data (.csv) file you want to upload.
3. Click **Sync Teacher/Student Associations**.
   - If there are no errors, then the **Upload Successful** page displays.
   - If there are errors, then the **Errors** page displays.
     - Review the error.
     - Return to the .csv file and update the file accordingly.