

Creating and Uploading Data Files

Load data into easyCBM or provide data to HMH in comma-separated value (.csv) format.

Create Data Files

Data for the three main 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.

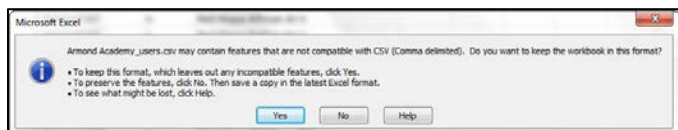
To create a data file:

1. Create a new file in Microsoft Excel.
2. 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		EII	
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**. A warning message appears asking if you want to keep the workbook in .csv format.



- Click **Yes** to save the file as a comma delimited (CSV) file.
- Click **No** to return to the file without saving.

Note: You can save the completed data file and reuse it to add or update user data. You can save an additional version with today's date appended to the filename (for example, 2_users_01142016.csv) to keep a historical record.

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 <ul style="list-style-type: none"> 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. For other users who are not directly associated with a student (most Building- and District-level users), unique fictitious IDs may be used 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.		
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	<ul style="list-style-type: none"> Teacher-level users (typically teachers and assessors) can view students listed on the 3_teacher_student.csv association file. Building users (typically building test coordinators) can view classroom, teacher, and student information for a specific building(s) with which the user is affiliated. District users (typically district test coordinators) can view building, teacher, and student information at all schools within the district. 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. Admin accounts can be assigned in the 1_users.csv file or through easyCBM. 	N	Teacher Level = 1 Building Level = 2 District Level = 3 Head Admin Level = 4

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 Include slashes January = 01 February = 02 March = 03 April = 04 May = 05 June = 06 July = 07 August = 08 September = 09 October = 10 November = 11 December = 12 Day = 01 to 31 Year = Each position 0–9
Last	Student last name	A	A–Z, including 7-bit ASCII characters
First	Student first name (this is the what student selects when testing online). Consider preferred name, if available.		
Grade	K, 1–8	N	K–12, for example: K or KG = Kindergarten, 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. Note: This is case sensitive.	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 Male = M
SPED	Information used for research and development and to build a better system. These fields are required to have non-blank values.		Yes = Y 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 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 Asian Black or African American Native Hawaiian or Other Pacific Islander White 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 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 passwords adds significant overhead and time for administering online tests.		

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 <ul style="list-style-type: none"> 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. For other users who are not directly associated with a student (for example, most Building and District-level users), fictitious IDs may be used but only if the IDs are unique. 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.

Important: You must have a properly formatted data file to use this option. For instructions on creating a properly formatted data file, see “Creating Data Files” on page 1.

To upload a users file:

1. From the **Admin** page, click **User Accounts**. The **User Accounts** page opens.
2. Click **Upload Users File**. The **Add/Edit Accounts via File Upload** page appears.
3. Click **Choose File**. Select the data (.csv) file you want to upload.
4. Click **Preview User List**. The user account data appears and identifies any changes made to user data. (Edits are highlighted in yellow and appear in italics.)
5. Review each line of the preview. If no corrections are required, then continue to step 6.

If corrections are required, click **Go Back** to return to the **Add/Edit Accounts via File Upload** page. Return to the .csv file and update the file accordingly. Repeat steps 3–5.

Employee ID	Username	Password	Email	Last Name	First Name	Building Names	User Type	Handling Action
1234	jane	password not changed	jane@harcourt.edu	Peterson	Jane	Jefferson High	2	See
1235	jane	password not changed	jane@harcourt.edu	Smith	Jane	Jefferson Elementary	1	No Changes
1236	Katana	password not changed	katana@harcourt.edu	Katana	Kathy	Jefferson Jr. High	3	No Changes
1237	intrepid	password not changed	intrepid@harcourt.edu	Francis	Yarnall	Jefferson Jr. High	2	No Changes
1238	Becky	Becky!	becky@harcourt.edu	Becky	Becky	Jefferson High	2	Add

6. Click **Add/Edit User Accounts**. A confirmation message appears and informs you that the user's account information 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 **here** link and then follow the instructions for Editing an Existing Individual User Account in the online help for Administrators.



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.

Note: If you are adding students to or editing students from an existing student roster, see “Editing Existing User Accounts via File Upload” in the easyCBM online help for Administrators.

Important:

- * You must have a properly formatted data file to use this option. For instructions on creating a properly formatted data file, see “Creating Data Files” on page 1.
- * To maintain a record of all students and their scores from previous years, districts should, before uploading new roster information, export the Benchmark and Progress Monitoring reports to their district's data warehouse. This needs to be completed prior to June 30. (easyCBM rolls over to the new school year each year on July 1.) See “Exporting Benchmark and Progress Monitoring Data” in the easyCBM online help for Administrators.

To upload a student roster file:

1. From the **Admin** page, click the **Student Records** section.
2. Click **Upload Student Roster File**. The **Student Roster Upload** page appears.
3. Click **Choose File**. Select the data (.csv) file you want to upload.
4. Click **Import/Sync Student Roster**.

- If there are no errors, then the **Upload Successful** page appears.
- If there are errors, then the **Errors** page appears.
- Review each line of the preview and identify the error.
 - If you agree with the changes, click **Yes, Continue Processing** to continue processing the file. The **Upload Successful** page appears.
 - If you do not agree with the changes, click **start over**. The **Student Roster Upload** page appears.

Admin > Student Roster Upload > Errors

Error: The following errors were encountered while scanning the uploaded file.
Please fix these errors and upload the file again. Nothing from this file has been saved.

Error: The following records in the uploaded file were missing at least one of the required demographic fields (Gender, SPED, Ethnicity, Race, and ELL). None of these fields can be blank.

Line Number	Student ID	Last Name	First Name	Gender	SPED	Ethnicity	Race	ELL
6	100396	Catlett	Michal	N				
7	100644	Pankh	Anita	N				

5. Return to the .csv file and update the file accordingly. Repeat steps 1–4.

Upload Teacher-Student Association Files

The teacher-students association 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). Note that 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.

Important: You must have a properly formatted data file to use this option. For instructions on creating a properly formatted data file, see “Create Data Files” on page 1.

To upload a teacher-student association file:

1. From the **Admin** page, in the **Student Records** section, click **Upload Teacher/Student Associations**. The **Teacher/Student Associations** page appears.
2. Click **Choose File**. Select the data (.csv) file you want to upload.
3. Click **Sync Teacher/Student Associations**.

Admin > Teacher/Student Associations

This feature expects a file saved in CSV (Comma Separated Values) format, with a .csv extension, and organized with the following columns:
Employee ID, Student ID

1. Locate the .csv file that contains your district's teacher/student associations in the above format:
 No file chosen

2. Next, click the following button:

- If there are no errors, then the **Upload Successful** page displays.
- If there are errors, then the **Errors** page displays.
 - Review each line within the preview and identify the error.
 - Return to the .csv file and update the file accordingly. Repeat steps 1–4.

Admin > Teacher/Student Associations > Errors		
Error: The following errors were encountered while scanning the uploaded file. Please fix these errors and upload the file again. Nothing from this file has been saved.		
Error: The following rows contained Student IDs that did not exist.		
Line Number	Employee ID	Student ID
4		
5		