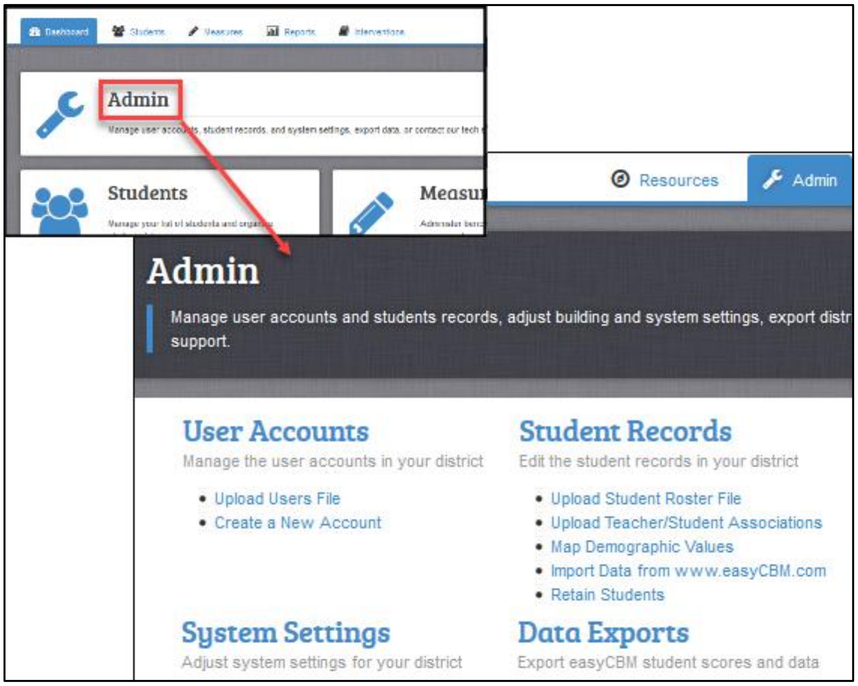
Starting a New School Year

School districts that have used easyCBM in a previous year must update student and teacher information in the easyCBM system. Additionally, Administrators should review system settings, such as Benchmark windows and percentile line display options, at the beginning of the year. Three data files should be uploaded into the system—users, students, and teacher-student associations. **The initial order of upload (as listed in this document) is important.**

Note: The steps in this quick guide begin on the **Admin** page, following the creation of the preparatory .csv files for the first three procedures. If you are not a Head Admin user, you will not see this option on your Dashboard.



Step 1: Create and Upload a User File

To create and upload a user file:

1. Create a users file in the CSV (comma separated values) format organized with the following columns:

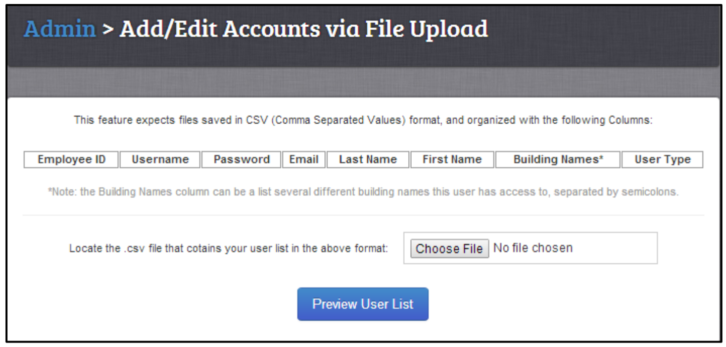
A	B	C	D	E	F	G	H
Employee_ID	Username	Password	Email	Last_Name	First_Name	Building_Names	User_Type

Note the following:

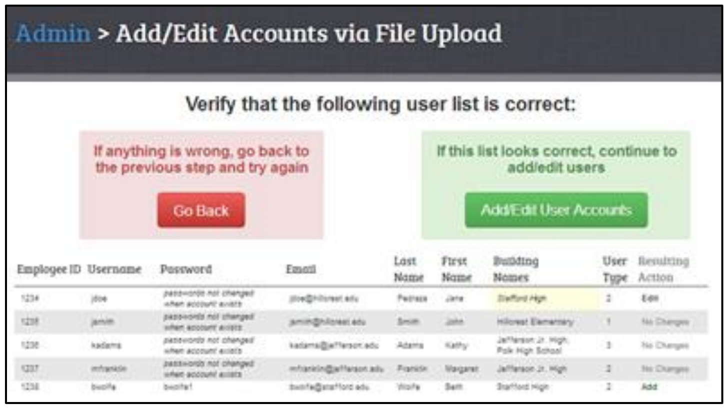
- Employee ID must be unique and is used to key other data fields.
- Building Names can be a list of several different building names this user has access to, separated by semicolons.
- User Type controls user access and should contain a numeric value,1 through 4: 1 = teacher access, 2 = building, 3 = district, and 4 = district plus Head Admin capabilities.

The users data file should be created from current district information. If there are new teachers or staff, or teachers that have moved to different buildings, this information should be included in the `1_users.csv` upload.For more information about creating data files, see the *Creating and Uploading Data Files Quick Guide* or About Data Files in the online help for easyCBM Administrators (http://downloads.hmlt.hmco.com/Help/easyCBM/Admin/index.htm).

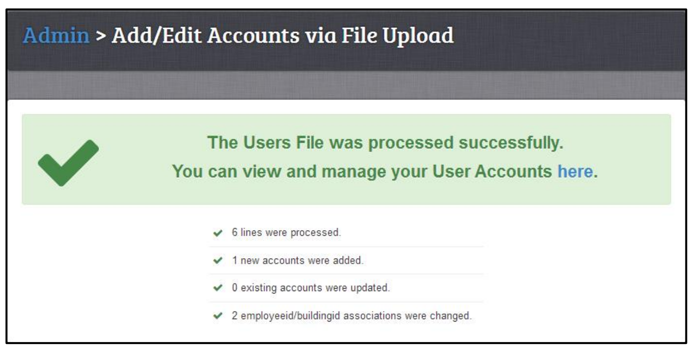
2. From the **Admin** page, click **Upload Users File**. The **Add/Edit Accounts via File Upload** page appears.
3. Click **Choose File**. Select the data (.csv) file you want to upload.
4. Click **Preview User List**. The user account data appears and identifies any changes made to user data. (Edits 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.
6. Click **Add/Edit User Accounts**. A confirmation message informs you that the user's account information has been successfully updated.



Note: Click **here** on the confirmation message to review all users associated with your district. Click **User Type** to sort users by type. Click **Building Names** to sort by building name to identify Building users at a specific campus.



Important: This function does not remove teachers/staff members who were users in the previous school year and are no longer in the district. Users are not automatically removed, even if they are not in the current file. In addition to removing them from the .csv file, the Administrator must manually delete these users by navigating to **Admin > User Accounts**, clicking the specific user's name to access their account page, and clicking **Delete Account**.

Step 2: Create and Upload a Student Roster File

To create and upload a student roster file:

1. Create a student roster file in the CSV (comma separated values) format organized by the following columns:

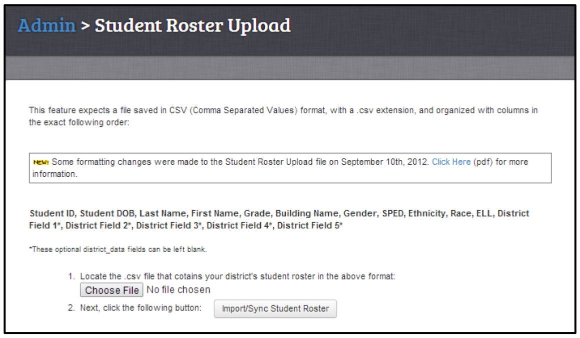
A	B	C	D	E	F	G	H	I	J	K
StudentID	Date_of_Birth	Last	First	Grade	Building_Name	Gender	SPED	Ethnicity	Race	Ell

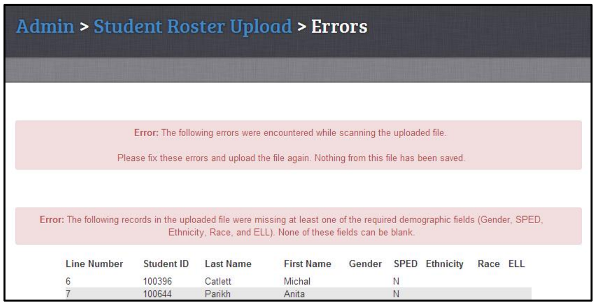
L	M	N	O	P
District_Data_1	District_Data_2	District_Data_3	District_Data_4	District_Data_5

*Columns L–P are optional district_data fields that can be left blank to fit all fields on one row.

For more information about creating data files, see the *Creating and Uploading Data Files Quick Guide* or the About Data Files section in the online help for easyCBM Administrators (http://downloads.hmlt.hmco.com/Help/easyCBM/Admin/index.htm).

2. From the **Admin** page, 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 displays.
   – 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 **Cancel**. The **Student Roster Upload** page appears. Return to the .csv file and update the file accordingly. Repeat steps 2 - 4.

Step 3: Create and Upload a Teacher/Student Associations File

To create and upload a teacher/student associations file:

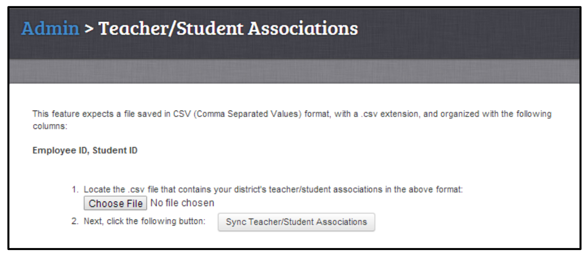
1. Create a teacher/student associations file in the CSV (comma separated values) format organized with the following columns:

A	B
EmployeeID	StudentID

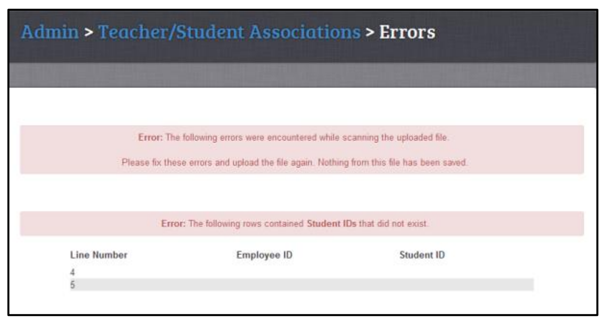
   This file should be uploaded last. It associates students with teachers. All class changes from the previous school year should be represented in this file. For more information about creating data files, see the *Creating and Uploading Data Files Quick Guide* or the About Data Files section in the online help for easyCBM Administrators (http://downloads.hmlt.hmco.com/Help/easyCBM/Admin/index.htm).

2. From the **Admin** page, 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 **Sync Teacher/Student Associations**.
   - If there are no errors, then the **Upload Successful** page appears.
   - If there are errors, then the **Errors** page appears.
     - Review each line within the preview and identify the error.
     - Return to the .csv file and update the file accordingly. Repeat steps 2–4.



Step 4: Review and Update System Settings

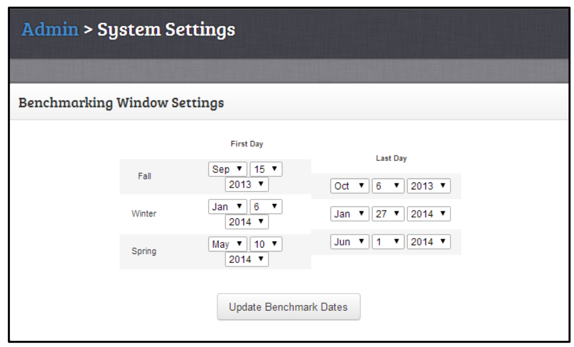
The **System Settings** page contains options that allow administrators to customize *easyCBM* for their users. It is important to understand how these settings impact the system. To get the most out of *easyCBM* we recommend you review and update these settings at this time.

These settings also impact graphs of student scores throughout the system—this is the first place to check if your users are reporting display issues with the graphs.

Benchmark Window Settings

Set the dates for the Fall, Winter, and Spring Benchmarks at the beginning of the school year, prior to any testing. The Benchmark assessments are time stamped with the first date recorded in the Benchmark window. Therefore, it is important that the dates set in the system are an accurate representation of when the Benchmarks will be administered.

To update Benchmark Window Settings:



1. From the **Admin** page, click **System Settings**. The **System Settings** page appears.
2. In the **Benchmarking Window Settings** section, complete the following information:
   - For each Benchmark window (Fall, Winter, Spring), indicate the **first day** of the window by selecting the month, day, and year from the drop-down boxes.
   - For each Benchmark window (Fall, Winter, Spring), indicate the **last day** of the window by selecting the month, day, and year from the drop-down boxes.

Important

* Percentile Lines are based on the dates designated as the beginning and end of the Fall, Winter, and Spring Benchmarks. Setting a short Benchmark window is recommended for more accurate reporting on time-series data reports.

* Be sure to select the correct year setting Benchmark window dates. Selecting an incorrect year causes Percentile Lines on the Individual Graphs to be repeated in oddly shaped patterns.

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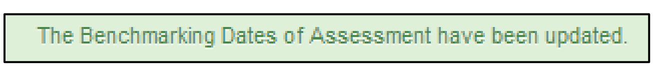
3. Click **Update Benchmark Dates**. A confirmation message appears and informs you the Benchmarking dates have been successfully updated.



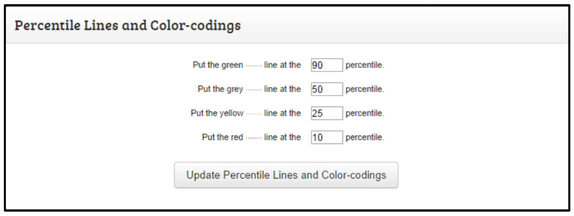
Percentile Lines and Color-codings

Administrators should review the Percentile Line settings at the beginning of the school year to ensure they are set according to district specifications.

To update percentile lines and color-codings:

1. From the **Admin** tab, click **System Settings**. The **System Settings** page appears.
2. Scroll to the **Percentile Lines and Color-codings** section.

   By default, the system pre-loads the 10th, 25th, 50th, and 90th percentile settings. These settings were selected to reflect current practice in many districts.



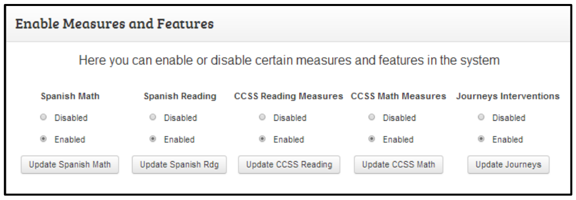
3. Click **Update Percentile Lines and Color-codings**. A confirmation message appears and informs you the Percentile Lines and color-codes have been successfully updated

Enable Measures and Features

Administrators can enable or disable certain measures and features in the system, for example, Spanish Math or Spanish Reading. This area controls user access to new measures and other system features. Make sure you are getting the most out of your *easyCBM* experience; consider enabling these for your users.

To enable or disable measures and features:

1. From the **Admin** page, click **System Settings**. The **System Settings** page appears.
2. Scroll to the **Enable Measures and Features** section.
3. Refer to the table below to continue.



If you want to…	Then do this…
Enable a measure	a. Click the **Enabled** radio button to enable testing for that measure. b. Click the update button for that measure. (For example, **Update Spanish Math**.) A confirmation message appears and informs you the measure has been successfully updated. The Spanish Math setting has been updated.
Disable a measure	a. Click the **Disabled** radio button to disable testing for that measure. b. Click the update button for that measure. (For example, **Update Spanish Math**.) A confirmation message appears and informs you the measure has been successfully updated. The Spanish Math setting has been updated.