

DATA MANAGER™ 

# **Creating and Submitting Data Files**

Version 5

# Acknowledgments

## Trademarks

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## Overview

In order to manage your assessment programs in *DataManager™*, you must set up rosters that connect students, teachers, classes, grades, and buildings. This ensures that students can be assigned to take tests and that results are reported correctly.

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**Important:** You must log on as the Account Holder or a System Administrator to set up rosters using the file upload method.

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To set up locations, staff/users, and students, you must create and submit data files to Riverside to be imported into *DataManager*. A data file is an ASCII text file in comma-separated values (.csv) format. Data from a Microsoft Excel spreadsheet can be saved in .csv format using the "Save as" function in Excel. The following three data files must be properly prepared and submitted to Riverside in order for you to use *DataManager*:

- Location - Contains the places associated with staff/users and students who are involved in testing (see [Set Up Locations](#))
- Staff/User - Contains identification, location, and roles and permissions information for all teachers and staff members who will use *DataManager* (see [Set Up Staff/Users](#))
- Student - Contains demographic and location information for students who will be assigned to take tests with *DataManager* (see [Set Up Students](#))

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**Note:** In some cases, only the location or location and student data files are needed (for example, if you are the only person in your school who requires access to *DataManager* or if you are using *DataManager* to access web reports only).

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### See Also:

[About Data Files and Rosters](#)

[Data Files and the SFTP Site](#)

## About Data Files and Rosters

A **roster** is the relationship between students and their locations. This relationship determines the groups in which students can be tested and the way data can be reported. After you create a roster, you can begin setting up test events and test assignments for both online testing and testing with plain-paper answer documents.

The location and student data files, in addition to a staff/user file, must be prepared in the correct format and submitted to Riverside Operations in order for a roster to be created. Operations validates the files, imports them into *DataManager*, and the data are combined into a roster. In order for the data to be correctly combined, the location fields in the student, staff/user, and location files must match exactly.

## Chapter 1. Single or Multiple Rosters

*DataManager* allows you to create one or more rosters for specific reporting purposes. Each roster requires a separate student data file. The scenarios described below will help you decide whether you need a single roster or multiple rosters.

### Single Roster

If your school system requires a single reporting structure for all classroom locations, then you can create a single roster that associates each student with a class location. For example, if your school system is planning to administer the *Cognitive Abilities Test™ (CogAT)* Level 9 to all third-graders at its elementary schools and you want the results reported by classroom teacher in each building, you will need a single roster that associates each student with a single classroom teacher. In addition to the staff/user and location data files, you must submit a single student data file containing these associations.

### Multiple Rosters

If your school system requires a custom reporting structure for each class location, then multiple rosters are assigned to associate students with multiple class locations. For example, if your school system is planning to administer *Interim Assessments* for English Language Arts and *Interim Assessments* for Math in the same testing window and you want results reported by teacher, you would need one roster that associates students with their Language Arts teachers and another roster that associates students with their Math teachers. In addition to the staff/user and location data files, you would need to submit two student data files to Riverside, one containing the students and their associated Language Arts teachers and another containing the students and their associated Math teachers.

#### See Also:

[Creating and Submitting Data Files Overview](#)

[Data Files and the SFTP Site](#)

## Chapter 2.Locations

### About Setting Up Locations

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You must log on as the Account Holder or a System Administrator to set up locations using the file upload method.

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A location in *DataManager* associates staff and students with testing. You must create locations in order for you and your staff to set up test events and assignments, run web reports, and perform other tasks using *DataManager*.

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**Note:** Prior to setting up locations in a data file, check to see if those locations already exist in *DataManager*. To search for a location, log on to *DataManager*, click **Admin** in the upper right corner, click **Manage Locations**, and then click **Search/Edit Locations**. If your location name appears, then that location already exists in *DataManager* and you should not attempt to create it again. Use the location names exactly as they appear in *DataManager* when you create location, staff, and student data files.

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To set up locations in *DataManager*, you must complete the following:

- [Download](#) the **Location File** template.
- [Enter your location data](#) into the template. Retain all columns (headers) even if you have no data to enter for them.
- Save the template as a data file.
- [Upload](#) the data file to the SFTP site in your DataManager folder.

Most school systems upload only one location data file. The location data is never deleted as part of the import process; however, you can make changes to the location data by uploading a data file containing the updates.

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When one teacher replaces another for a particular class, add the new teacher as a new class-level location using the **Admin** tool on the *DataManager* platform. If the teacher is new to the school system, you will also need to add the new teacher as a Staff/User. For more information, see *Data Administration*.

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### Organizational Hierarchy

The arrangement of locations in *DataManager* should reflect the hierarchical organization of your school system and the relationships between school buildings and classes. Location setup allows for six levels of hierarchy, though most organizations do not use all of the available levels.

The available levels in the hierarchy are as follows:

- State
- Region
- System
- District/Area
- School/Building
- Class

Typically, testing programs use only the District/Area, School/Building, and Class levels. Additional levels may be used for regional testing programs with school groups, archdiocesan testing programs that include a number of dioceses, or state-level testing programs.

Students are assigned to classes and can have only one class assignment. Staff/users may be assigned to any level in the hierarchy and can have multiple location assignments; however, the assignment must all be at the same level in the hierarchy.

Your assigned location level, along with your role assignment, determines the records you can view and the tasks you can perform in *DataManager*. You can view only those records that are at or below your level in the location hierarchy, and you can perform only those tasks for which you have been assigned the appropriate role (see [Understanding Roles and Permissions](#) for more information about roles).

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**Note:** Your location level and assigned role determine what you will see when you log on to *DataManager*. For example, you may not see all levels of your organization’s location hierarchy.

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## Reporting

Summary reports with group averages are provided for each location where students are tested. When setting up locations, consider how you would like your score reports organized. Ensure that you set up a separate location for each level at which you would like to receive a summary report. For example, if you would like a building summary report containing results for all classes within the building, you must set up a building-level location.

## Plain-paper Answer Documents

Plain-paper answer documents are printed from *DataManager* for the group of students that will take the test. If you plan to use plain-paper answer documents to administer tests, you should consider how students will be grouped for testing.

For example, if the tests will be administered during a homeroom period, the name of the homeroom teacher should be included as a class in the location data file.

	A	B	C	D	E	F
1	District/Area *	School/Building	School/Building Code	Class	Grade	Code
2	Sample District	Sample School		Smith J.	2	1



If the tests will be administered during a given course period, each teacher, course period, and grade combination should be included as a class in the location data file.

	A	B	C	D	E	F
1	District/Area *	School/Building	School/Building Code	Class	Grade	Code
2	Sample District	Sample School		Smith J. Math p1	7	1
3	Sample District	Sample School		Smith J. Math p2	7	2
4	Sample District	Sample School		Smith J. Math p3	7	3
5	Sample District	Sample School		Smith J. Math p4	8	4
6	Sample District	Sample School		Smith J. Math p5	8	5
7	Sample District	Sample School		Smith J. Math p6	8	6

## Online Testing

### See Also:

[About Data Files and Rosters](#)

[About Setting Up Staff/Users](#)

[About Setting Up Students](#)

## Download the Location Data File Template

In order for Riverside to import your location data into *DataManager*<sup>™</sup>, you must supply a properly formatted data file in comma-separated values (.csv) format. The *DataManager* **Location File Template** is a Microsoft Excel spreadsheet that will assist you in creating a properly formatted data file.

### To download the Location File Template:

1. In your browser's address bar, type the following URL:

<https://riversideinsights.com/solutions/data-manager?tab=2>

The *DataManager* /Online Testing Through *DataManager* page opens.

2. Scroll down to the **Data File Templates** heading.

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DATA MANAGER

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# DataManager

DataManager is your single source of support for your Riverside Insights™ assessment program. Data allows you to streamline the management and reporting of *Iowa Assessments™* Forms E, F, and G; *Lo TERCERA EDICIÓN*; *Cognitive Abilities Test™ (CogAT™)* Forms 7 and 8; *CogAT Screening Forms*; and *MacGinitie Reading Tests® (GMRT™)*.

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Description & Features Tools **Online Testing** Webinars

## Online Testing through *DataManager*

The tools below will support your successful online testing experience through *DataManager*. Be sure to discuss your needs with your local Riverside Insights representative, who will initiate the readiness process.

### Creating and Submitting Data Files

[Creating and Submitting Data Files User's Guide](#) [Rostering FAQs](#) [More Help](#)

#### Data File Templates

[Staff File Template](#) [Student File Template](#) [Location File Template](#)

3. Click **Location File Template**. Follow your browser's prompts to save (download) the file.

**See Also:**

[Create a Location Data File](#)

[About Setting Up Locations](#)

## Create a Location Data File

An example of the **Location File Template** in Microsoft Excel is shown below.

**Note:** The template may not contain all of the fields shown in the example.

	A	B	C	D	E	F	G	H	I	J
1	District/Area *	School/Building	School/Building Code	Class	Grade	Code	Address	City	State	Zip Code
2										

You can submit location data in multiple data files, if necessary. For example, the first file you submit may be created at the district level with only the **District/Area** column completed. Next, the school superintendent may complete the **School/Building** column and submit a second file. Finally, the school principal may complete the **Class** column and submit a third file.

You can either type the data directly into the cells of the template, or you can copy and paste data from another file into the template.

View descriptions of the columns in the Location File Template.

### To create a location data file:

1. Open the **Location File Template** in Microsoft Excel.
2. Type or copy location data into the columns. Note the following:
  - Enter only permitted values in the fields. See descriptions of columns and valid values for definitions, length limits, and special characters. Commas are not permitted.
  - School/Building names must be unique. See [Creating Unique School/Building Names](#) below.
  - Class names must be unique. See [Creating Unique Class Names](#) below.
  - The **District**, **School/Building**, and **Class** fields must match in all three data files (Location, Staff/User, and Student).
  - Do not delete columns from the template or change the header text.
3. When you have finished adding data to the template, click **File**, and then click **Save As**. The **Save As** dialog box appears.
4. In the **Save in** list, browse, as needed, and select the directory where you plan to retrieve the file when uploading.

5. In the **Filename** box, type a name for the file. The file naming convention for a new location data file is as follows:

`new_myrpcftpname_testfamily_location_mmddyy.csv`

where:

- **myrpcftpname** is the username for the SFTP site on RPCFTP. Enter the username that was provided to the Account Holder in the Welcome Information email.
- **testfamily** is the test family name. Enter "default" if you plan to use this data file for more than one test family.
- **mmddyy** is the date you want associated with the data file, usually today's date.

See File Naming Conventions for Data Files for more information about naming new data files.

6. In the **Save as type** list, save the file with a comma-separated values extension (.csv).
7. Click **Save**, and close the file. The file is ready to upload.

Continue to [Upload Data Files](#).

See Also:

[About Setting Up Locations](#)

[Create and Submit Data Files Overview](#)

### Creating Unique School/Building Names

DataManager requires that all school/building names be unique so that test results can be accurately reported. If you have two or more schools or buildings with the same name, you can use the **School/Building Code** field to differentiate each school/building.

For example, if a single archdiocese contains three different schools with the name "St. Mary's School," use the School/Building and School/Building Code fields to differentiate among the schools, as shown below:

	A	B	C
1	District/Area*	School/Building	School/Building Code
2	Archdiocese Chicago	St. Mary's School	StMary01
3	Archdiocese Chicago	St. Mary's School	StMary02
4	Archdiocese Chicago	St. Mary's School	StMary03

All School/Building + School/Building Code entries in the data file must be unique.

### Creating Unique Class Names

DataManager requires that all class names be unique so that test results can be accurately reported. If you have two or more classes with the same name, you can use the **Code** field to uniquely identify

each class. *DataManager* checks for duplicate class names based on comparing the following data string for each class:

Class Name + Grade + Code

For example, suppose teacher “Smith J” teaches three grade 2 classes and one grade 3 class. To ensure the four classes have unique names, you can use the **Grade** and **Code** fields to differentiate among the classes, as shown below:

D	E	F
Class	Grade	Code
SmithJ	2	1
SmithJ	2	2
SmithJ	2	3
SmithJ	3	1

## Chapter 3.Staff/Users

### About Setting Up Staff/Users

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You must log on as the Account Holder or a System Administrator to set up staff using the file upload method.

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Before staff members and teachers can use *DataManager*, you must set up a profile for each user. The profile contains identification information such as first and last names and e-mail addresses. The profile links each user to one or more locations and assigns each user a role, such as Administrator, Teacher, or Proctor. For more information about roles, see [Roles and Permissions](#).

## Chapter 4.Adding Users to DataManager

There are two methods to add users to *DataManager*:

- Upload a user data file that is created from the **Staff/User File Template**
- Manually enter user data directly into *DataManager*

Users assigned to a location have permission to access data for that location and any locations organized below that location in the hierarchy. For example, a building principal may view reports only for their school building, the classes within their school building, and the students within their school building. Likewise, a classroom teacher may view reports only for their class and the students within their class.

In order for Riverside to import your staff/user data into *DataManager*, you must supply a properly formatted data file in comma-separated values (.csv) format. The *DataManager* **Staff/User File Template** is a Microsoft Excel® spreadsheet that will assist you in creating a properly formatted data file.

See Also:

[Create and Submit Data Files Overview](#)

[Roles and Permissions](#)

[Download the Staff/User Data File Template](#)



## Roles and Permissions

In *DataManager*, you assign one role to each staff/user by specifying the role in the staff/user data file. Role assignments enable users to perform specific tasks on records at their location level and below. See [About Setting Up Locations](#) for more information about location levels.

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**Note:** Your location level and role assignment determine what you see when you log on to *DataManager*. For example, you may not see all *DataManager* features or all levels of your organization’s location hierarchy.

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## Chapter 5.Roles

A role is a set of permissions that allows users to view records and perform specific tasks within *DataManager*. The user’s role and location, combined with their institution's purchased data package, determine which tasks they can perform. The following roles are available in *DataManager*:

- **Account Holder** – Only one user may be assigned the Account Holder role. The Account Holder is the primary contact for Riverside and has the ability to perform all *DataManager* tasks.
- **Administrator** – The Administrator has the ability to perform most *DataManager* tasks for his/her location level and below; however, Administrators cannot manage account notifications or licenses or export testing activity details.
- **Teacher** – The Teacher has the ability to create test assignments, print test booklets, print plain-paper answer documents, administer online tests, and view reports.
- **Proctor** – The Proctor has the ability to administer online tests.
- **Digital Resource & Reporting Access** – This role has the ability to access the Digital Resources page and the Reporting application.
- **Digital Resource Access** – This role has the ability to access the Digital Resources page.

Click the following links to view the tasks permitted for each role and data package within *DataManager*.

### System Administration

Task	Role/Data Package					
	Account Holder			Administrator		
	Online	DataPlus	Basic	Online	DataPlus	Basic
Manage Reporting Access	✓	✓		✓	✓	
Manage Locations	✓	✓	✓	✓	✓	✓
Add Locations	✓	✓	✓	✓	✓	✓
Search for Location	✓	✓	✓	✓	✓	✓
Edit/Delete Locations	✓	✓	✓	✓	✓	✓

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Manage Staff/Users	✓	✓	✓	✓	✓	✓
Add Staff/User	✓	✓	✓	✓	✓	✓
Search for Staff/Users	✓	✓	✓	✓	✓	✓
Edit/Delete Staff/Users	✓	✓	✓	✓	✓	✓
Manage Students	✓			✓		
Add a Student	✓			✓		
Search for Student	✓			✓		
Edit/Delete Student	✓			✓		
Manage Rosters	✓			✓		
Create/Rename a Roster	✓			✓		
Activate/Deactivate a Roster	✓			✓		
Export a Roster	✓			✓		
Add a Student to a Roster	✓			✓		
Export Testing Activity Details	✓					
Manage Account Notifications	✓					
View License Period for Interims	✓					

Assessments Application (online data package required)

Task	Role			
	Account Holder	Administrator	Teacher	Proctor
Find a Test Event	✓	✓	✓	
Create a Test Event	✓	✓		
Export a Test Event Roster	✓	✓	✓	
Delete a Test Event	✓	✓		
Edit a Test Event	✓	✓		
Create/Manage Test Assignments	✓	✓	✓	
Assign by Location and Grade	✓	✓	✓	
Assign by Student	✓	✓	✓	
View Test Assignments	✓	✓	✓	
Edit Test Assignment	✓	✓	✓	
Export Test Assignments	✓	✓	✓	
Print Test Assignment Roster	✓	✓	✓	
View Online Testing Student Status	✓	✓	✓	
Print Answer Documents	✓	✓	✓	
Proctor an Online Testing Session	✓	✓	✓	✓

Create a Testing Session	✓	✓	✓	✓
Manage a Testing Session	✓	✓	✓	✓
Add a Walk-in Student	✓	✓		
View Online Testing Student Status	✓	✓	✓	✓
Manage Scanning Sessions	✓	✓	✓	
View Scanning Session Summary	✓	✓	✓	
Send Scanning Session to Scoring	✓	✓	✓	
View Scanning Session Details	✓	✓	✓	
Delete a Scanning Session	✓	✓	✓	
Delete a Student Record	✓	✓	✓	
Resolve Scanning Errors	✓	✓	✓	
Edit Student Item Responses	✓	✓		
Add a Student to a Test Event Roster	✓	✓		
Download Scoring Order Form (OSS)	✓	✓		
Close a Test Event	✓	✓		
Reopen a Test Event	✓	✓		
Print Answer Documents	✓	✓	✓	
Print Test Booklets	✓	✓	✓	

## Reporting

Task	Role/Data Package							
	Account Holder		Administrator		Teacher		Digital Resource & Reporting Access	
	Online	DataPlus	Online	DataPlus	Online	DataPlus	Online	DataPlus
Create Reports	✓	✓	✓	✓	✓	✓	✓	✓
Add a Web Reporting Key to a User Account	✓	✓	✓	✓	✓	✓	✓	✓

### Access to Digital Resources

Permission to access the Digital Resources page is available to all user roles regardless of the data package. A user assigned the role of Digital Resource Access is able to enter *DataManager* only to access the Digital Resources page.

### See Also:

[About Setting Up Staff/Users](#)

[Create and Submit Data Files Overview](#)

## Download the Staff/User Data File Template

In order for Riverside to import your staff/user data into *DataManager*, you must supply a properly formatted data file in comma-separated values (.csv) format. The *DataManager* **Staff/User File Template** is a Microsoft Excel® spreadsheet that will assist you in creating a properly formatted data file.

### To download the Staff/User File Template:

1. In your browser's address bar, type the following URL:

<https://riversideinsights.com/solutions/data-manager?tab=2>

The *DataManager* /Online Testing Through *DataManager* page opens.

2. Scroll down to the **Data File Templates** heading.

The screenshot shows the Data Manager website interface. At the top, there is a navigation bar with links for Solutions, Shop Now, Support, Insights Today, and About. Below this is a header with the Riverside Insights logo and the Data Manager logo. The main content area features a 'Group-Administered' label and a large 'DataManager' heading. A descriptive paragraph follows, stating that Data Manager is a single source of support for Riverside Insights assessment programs, including Iowa Assessments, CogAT, and GMRT. A 'Request More Info' button is positioned below the text. A secondary navigation bar includes 'Description & Features', 'Tools', 'Online Testing', and 'Webinars'. The 'Online Testing' tab is active, leading to a section titled 'Online Testing through DataManager'. This section contains a paragraph about supporting online testing and a sub-section 'Creating and Submitting Data Files'. Under this sub-section, there are three cards: 'Creating and Submitting Data Files User's Guide', 'Rostering FAQs', and 'More Help'. Below these is a red-bordered box titled 'Data File Templates' containing three cards: 'Staff File Template', 'Student File Template', and 'Location File Template'. A mouse cursor is pointing at the 'Staff File Template' card.

3. Click **Staff File Template**. Follow your browser's prompts to save (download) the file.

**See Also:**

[Create a Staff/User Data File](#)

Update Staff/User Data

## Create a Staff/User Data File

An example of the **User File Template** in Microsoft Excel is shown below.

**Note:** The template may not contain all of the fields shown in the example.

	A	B	C	D	E	F		
1	District/Area	School/Building	School/Building Code	Class	Grade	Code		
2				G	H	I		
				First Name *	Last Name *	Middle Name	Gender	
					K	L	M	
					E-Mail Address *	Password	Roles *	Active User *

The following columns are required (indicated by the \*):

- District/Area
- First Name
- Last Name
- E-Mail Address
- Roles
- Active User

The remaining columns are optional and do not require information. However, they must remain as column headers even if their values are empty.

**Note:** The data in columns A–E must exactly match the data in the location data file.

You can either type the data directly into the cells of the template, or you can copy and paste data from another file into the template.

View descriptions of the columns in the Staff/User File Template.

### To create a Staff/User data file:

1. Open the **Staff/User File Template** in Microsoft Excel.
2. Type or copy staff/user data into the columns. Note the following:
  - Enter only permitted values in the fields. See descriptions of columns and valid values for length limits and special characters. Commas are not permitted.
  - Do not delete columns from the template or change the header text.

- The **District**, **School/Building**, and **Class** fields must be identical in all three data files (Location, Staff/User, and Student).
3. When you have finished adding data to the template, click **File**, and then click **Save As**. The **Save As** dialog box appears.
  4. In the **Save in** list, browse, as needed, and select the directory where you plan to retrieve the file when uploading.
  5. In the **Filename** box, type a name for the file. The file naming convention a new staff/user data file is as follows:  
  
`new_myrpcftpname_testfamily_staff_mmddyy.csv`  
  
where:
    - **myrpcftpname** is the username for the SFTP site on RPCFTP. Enter the username that was provided to the Account Holder in the Welcome Information email.
    - **testfamily** is the test family name. Enter "default" if you plan to use this data file for more than one test family.
    - **mmddyy** is the date you want associated with the data file, usually today's date.See File Naming Conventions for Data Files.
  6. In the **Save as type** list, save the file with a comma-separated values extension (.csv).
  7. Click **Save**, and close the file. The file is ready to upload.

**See Also:**

- [About Setting Up Staff/Users](#)
- [Download the Staff/User Data File Template](#)
- [Roles and Permissions](#)
- [Upload Data Files](#)



## Chapter 6.Students

### About Setting Up Students

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You must log on as the Account Holder or a System Administrator to set up students using the file upload method.

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Before you can create a test event, you must set up student records in *DataManager* and link them to specific locations. This allows you to search and view student test information for a particular class, building, and district. A student's test results are reported back to the student's assigned location.

In order for Riverside to import your student data into *DataManager*, you must supply a properly formatted data file in comma-separated values (.csv) format. The **Student File Template** is a Microsoft Excel® spreadsheet that will assist you in creating a properly formatted data file.

#### Unique Student ID Requirement

Each student must have a unique student ID in order to identify the student's test results currently and longitudinally. Student IDs are also important for ensuring prompt turnaround of score reports following test administration. If you submit separate student data files for each school building within your school system, you should have a system-level test administrator check the files to ensure student IDs are unique across all schools. If a student ID is duplicated, *DataManager* will overwrite the first student's information with that of the second imported student.

#### Single vs. Multiple Student Data Files

Students are grouped for a test based on their assigned locations. In most cases, a single roster that associates each student with a single class location will suffice. In some cases, however, a school system may require a custom reporting structure to associate each student with multiple class locations, which requires multiple rosters. Each roster requires a separate student data file. See [About Data Files and Rosters](#) for more information about multiple rosters.

#### See Also:

[About Data Files and Rosters](#)

[Download the Student Data File Template](#)

[Create a Student Data File](#)

## Download the Student Data File Template

In order for Riverside to import your student data into *DataManager*, you must supply a properly formatted data file in comma-separated values (.csv) format. The *DataManager* student data file template is a Microsoft Excel® spreadsheet that will assist you in creating a properly formatted data file.

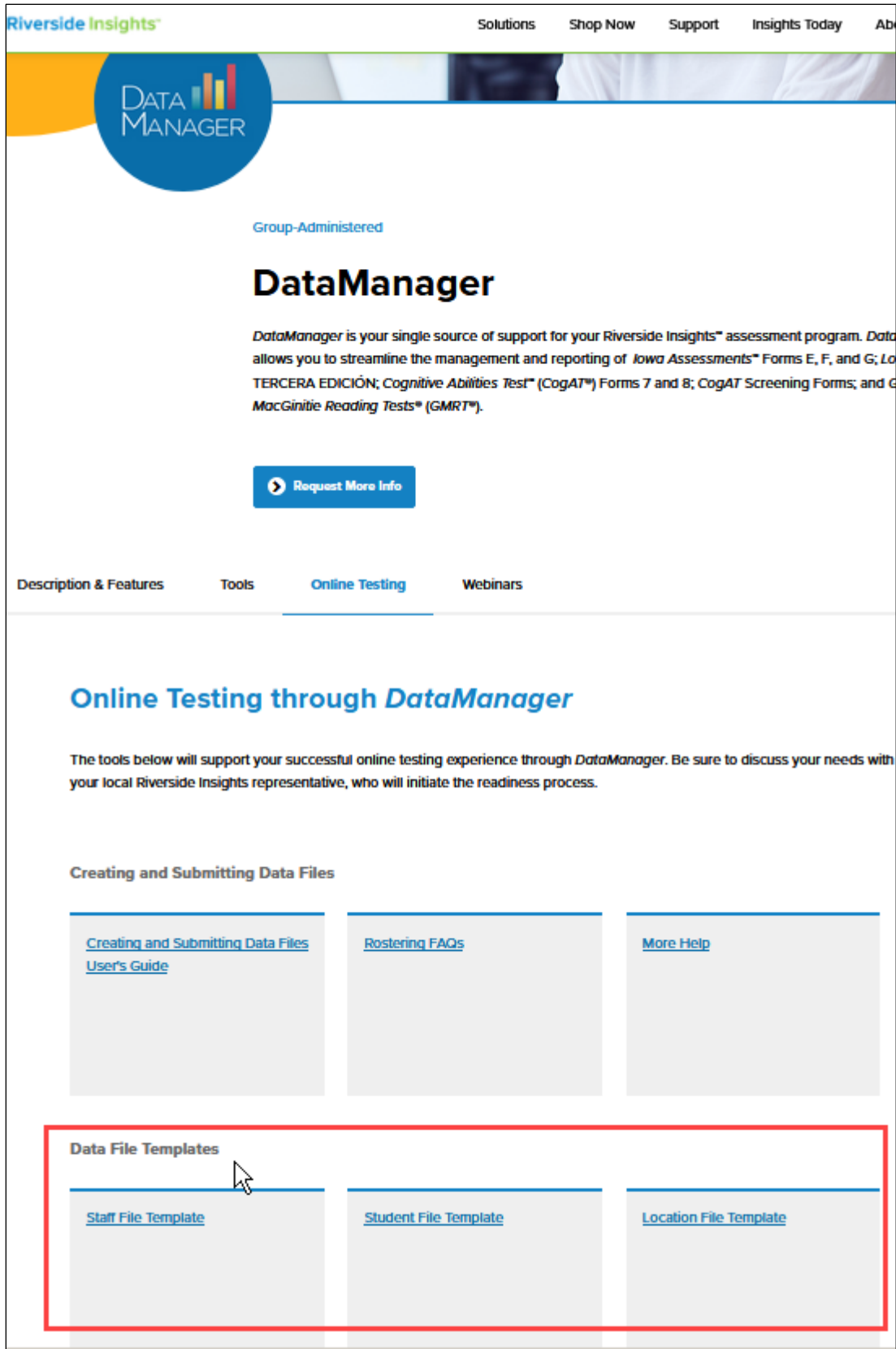
### **To download the Student File Template:**

1. In your browser's address bar, type the following URL:

<https://riversideinsights.com/solutions/data-manager?tab=2>

The ***DataManager /Online Testing Through DataManager*** page opens.

2. Scroll down to the **Data File Templates** heading.



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**DATA MANAGER**

Group-Administered

# DataManager

DataManager is your single source of support for your Riverside Insights™ assessment program. Data allows you to streamline the management and reporting of Iowa Assessments™ Forms E, F, and G; Lo TERCERA EDICIÓN; Cognitive Abilities Test™ (CogAT™) Forms 7 and 8; CogAT Screening Forms; and G MacGinitie Reading Tests® (GMRT™).

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Description & Features Tools **Online Testing** Webinars

## Online Testing through *DataManager*

The tools below will support your successful online testing experience through *DataManager*. Be sure to discuss your needs with your local Riverside Insights representative, who will initiate the readiness process.

### Creating and Submitting Data Files

- [Creating and Submitting Data Files User's Guide](#)
- [Rostering FAQs](#)
- [More Help](#)

### Data File Templates

- [Staff File Template](#)
- [Student File Template](#)
- [Location File Template](#)

3. Click **Student File Template**. Follow your browser's prompts to save (download) the file.

**See Also:**

[Create a Student Data File.](#)

Update Student Data

[Deactivate a Roster](#)

## Create a Student Data File

An example of the **Student File Template** in Microsoft Excel is shown below.

**Note:** The template may not contain all of the fields shown in the example.

	A	B	C	D	E		
1	District/Area *	School/Building *	School/Building Code	Class *	Code		
		F	G	H	I		
		First Name *	Last Name *	Middle Name	Unique Student ID *		
			J	K	L	M	N
			Date of Birth *	Gender *	Grade *	Active User	Additional ID Number

The following columns are required (indicated by the \*):

- District/Area
- School/Building
- Class
- First Name
- Last Name
- Unique Student ID
- Date of Birth
- Gender
- Grade

The remaining columns are optional and do not require information. However, they must remain as column headers even if their values are empty.

You can either type the data directly into the cells of the template, or you can copy and paste data from another file into the template.

View descriptions of the columns in the Student File Template.

### To create a Student data file:

1. Open the **Student File Template** in Microsoft Excel.
2. Type or copy student data into the columns. Note the following:
  - Do not delete columns from the template or change the header text.
  - Enter only permitted values in the fields. See descriptions of columns and valid values for definitions, length limits, and special characters. Commas are not permitted.

- The **District**, **School/Building** and **Class** fields must be identical in all three data files (Location, Staff/User, and Student).
3. When you have finished adding data to the template, click **File**, and then click **Save As**. The **Save As** dialog box appears.
  4. In the **Save in** list, browse, as needed, and select the directory where you plan to retrieve the file when uploading.
  5. In the **Filename** box, type a name for the file. The file naming convention for a new student data file is as follows:

`new_myrpcftpname_testfamily_student_mmddyy.csv`

where:

- **myrpcftpname** is the username for the SFTP site on RPCFTP. Enter the username that was provided to the Account Holder in the Welcome Information email.
- **testfamily** is the test family name. Enter "default" if you plan to use this data file for more than one test family.
- **mmddyy** is the date you want associated with the data file, usually today's date.

See File Naming Conventions for Data Files for more information about naming new data files.

6. In the **Save as type** list, save the file with a comma-separated values extension (.csv).
7. Click **Save**, and close the file. The file is ready to upload.

**See Also:**

[Upload Data Files](#)

[Download the Student Data File Template](#)

Update Student Data

[Deactivate a Roster](#)

## Deactivate a Roster

You can deactivate a roster by deactivating the associated student data file. When you do this, you can no longer select it when you set up new test events.

Typically, rosters are deactivated at the end or the beginning of a school year, when most or all of the students must be associated with new grade and class assignments.

Before you can begin testing in the new school year, you must deactivate the old student data file to make it unavailable for rostering. You can then upload the new student data file.

### To deactivate a roster:

1. Open your student data file in Microsoft Excel.
2. Click **File**, and then click **Save As**. The **Save As** dialog box appears.
3. In the **Save in** list, browse, as needed, and select the directory where you plan to retrieve the file when uploading.
4. In the **Filename** box, type a name for the file. The file naming convention for the data file to deactivate a roster is as follows:

`deactivate_myrpcftpname_testfamily_student_mmddyy.csv`

where **myrpcftpname**, **testfamily**, and **mmddyy** match the roster you want to deactivate.

See File Naming Conventions for Data Files.

5. In the **Save as type** list, save the file with a comma-separated values extension (.csv).
6. Click **Save**. When you upload this file, the student roster will be deactivated.

You can now update the student file, staff/users file, and location file and [upload them](#) for a new roster.

### See Also:

[About Setting Up Students](#)

[About Data Files and Rosters](#)

## Chapter 7. Data Files and the SFTP Site

### About the SFTP Site

The secure file transfer protocol (SFTP) is a web-based service that provides a secure channel for transferring your data files to *DataManager*.

Click the following topics for directions on how to log on and upload your files to *DataManager*:

- [Log On to the SFTP Site](#)
- [Manage the SFTP Site](#)
- [Upload Data Files to the SFTP Server](#)



## Log On to the SFTP Site

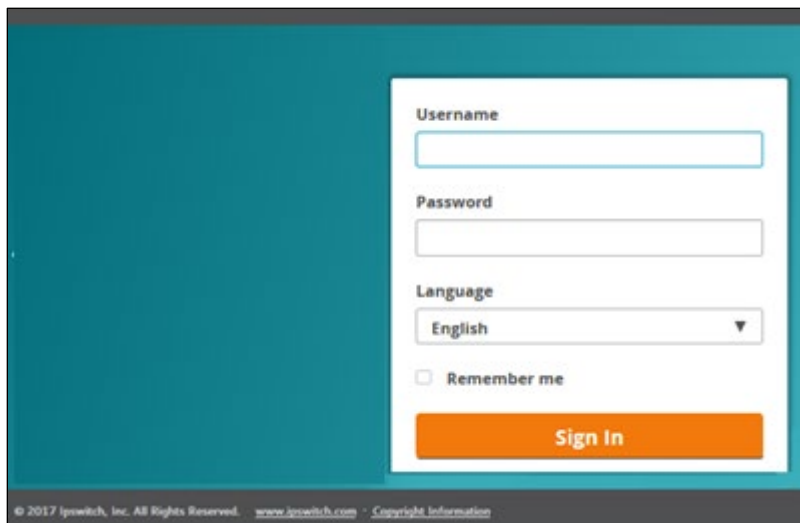
To log on to the SFTP server for the first time, you will need a temporary user name and password. Confirm that you have received an email from Riverside that contains these credentials before attempting to access the site.

### To log on to the SFTP server:

1. Open your browser.
2. In the browser address bar, type the following URL:

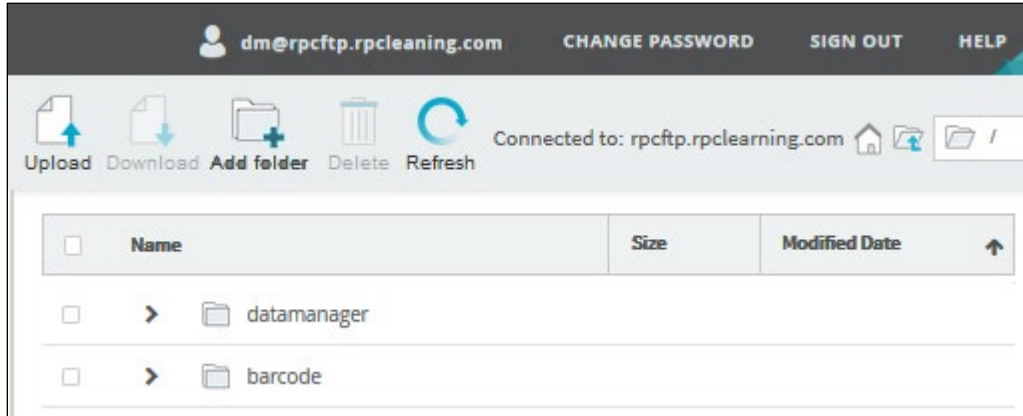
<https://rpcftp.rpclearning.com>

The SFTP logon page appears.



3. In the **Username** box, type your user name.
4. In the **Password** box, type your password.
5. Click **Sign In**.
6. If you are logging on for the first time, the SFTP site will immediately request that you change your password. Enter a new password, case-sensitive, that conforms to the following rules:
  - At least eight characters
  - Contains at least one numeric character
  - Contains at least one special character

When you have finished changing your password, a **Password Changed Successfully** message displays on the login form, and the **Transfer** page appears.



From here you can manage folders and upload files to your account.

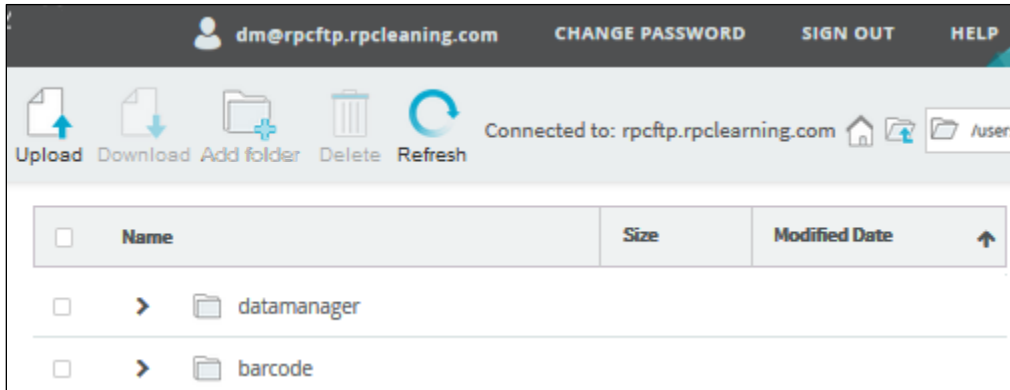
**See Also:**

[About the SFTP Site](#)

[Upload Data Files to the SFTP Server](#)

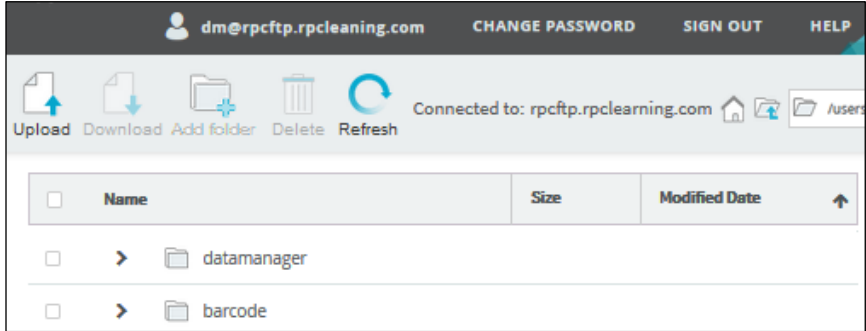
## Manage the SFTP Site

The SFTP web interface allows you to navigate to the folder where your data files need to be loaded. After you log on, the opening page appears.



The table below describes the buttons and icons on this page and how you can use them to manage your files on the SFTP site.

Button	Purpose	Steps
Upload	Upload a data file to <i>DataManager</i>	See <a href="#">Upload Data Files to the SFTP Server</a> .
Download	Download one or more data files to your local or network drive	<ol style="list-style-type: none"> <li>Use the arrows in the <b>Name</b> column to browse through your folders and find the files you want to download.</li> </ol> <ol style="list-style-type: none"> <li>Select the files you want to download. The <b>Download</b> icon in the header becomes active.</li> </ol>

		<p>3. Click the <b>Download</b> icon and follow your browser's prompts for saving or opening the files.</p>
<p>Refresh</p>	<p>Refresh the file listing in a folder</p>	<p>Click the <b>Refresh</b> button in the header.</p>  <p>The screenshot shows the DataManager web interface. At the top, there is a header with a user profile icon, the email 'dm@rpcftp.rpclcleaning.com', and links for 'CHANGE PASSWORD', 'SIGN OUT', and 'HELP'. Below the header is a toolbar with icons for 'Upload', 'Download', 'Add folder', 'Delete', and 'Refresh'. The 'Refresh' icon is a circular arrow. Below the toolbar, it says 'Connected to: rpcftp.rpclcleaning.com'. Below that is a file listing table with columns for 'Name', 'Size', and 'Modified Date'. The table contains two entries: a folder named 'datamanager' and a folder named 'barcode'. Each entry has a checkbox on the left and a right-pointing arrow.</p>

**See Also:**

[About the SFTP Site](#)

[Upload Data Files to the SFTP Server](#)

## Upload Data Files to the SFTP Server

This topic describes how to upload the data files you prepared for locations, staff, and students.

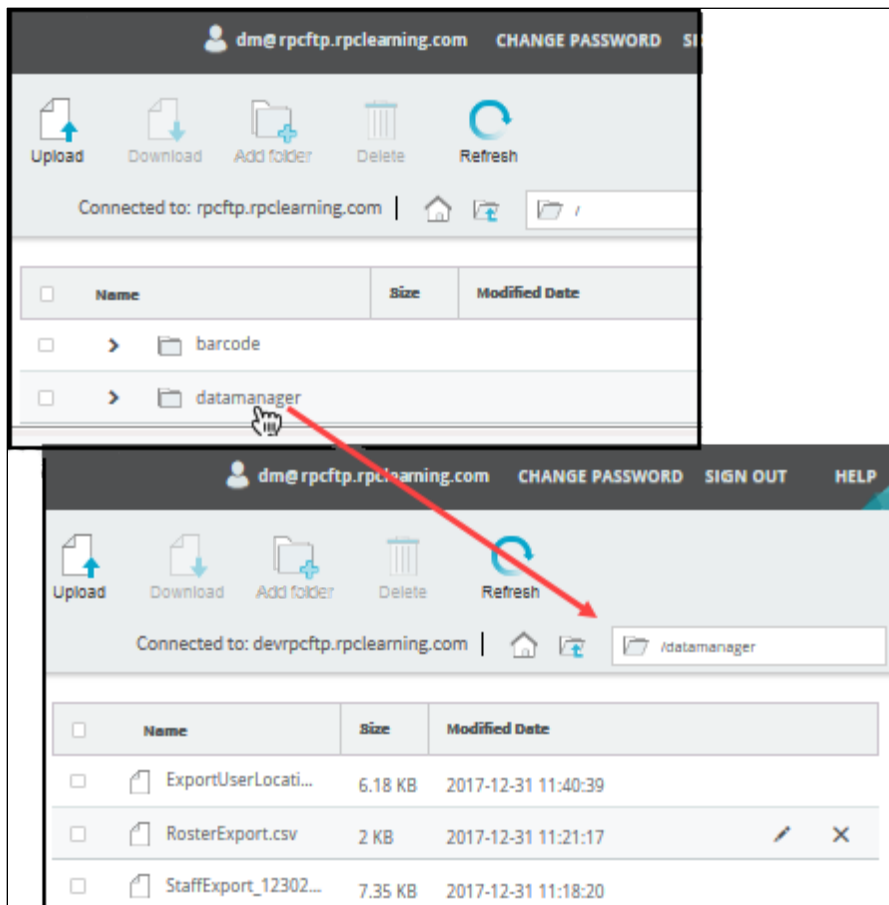
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**Important:** You must be a *DataManager* Account Holder or Administrator to upload files using the SFTP method.

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### To upload data files to the SFTP site:

1. On the SFTP site, navigate to the folder where you want to upload your files.



2. Click the **Upload** folder in the heading of the page. The **Upload Files** dialog box appears.

Upload Files

Click "Browse" to select a File. You can attach File(s) up to a total size of 50 MB.  
The Files will be uploaded to "/datamanager" folder

Overwrite selected Files on the server

File 1  Browse

File 2  Browse

File 3  Browse

File 4  Browse

File 5  Browse

Upload Cancel

3. Click the **Browse** button and find the file you want to upload in your local or network directory.

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**Note:** The SFTP site allows you to upload up to five files at one time.

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4. Select the data (.csv) file you want to upload.
5. Click **Open**. The path to the file you want to upload appears in the **File** box.

Upload Files

Click "Browse" to select a File. You can attach File(s) up to a total size of 50 MB.  
The Files will be uploaded to "/" folder

Overwrite selected Files on the server

File 1 UserLocations.csv Browse X

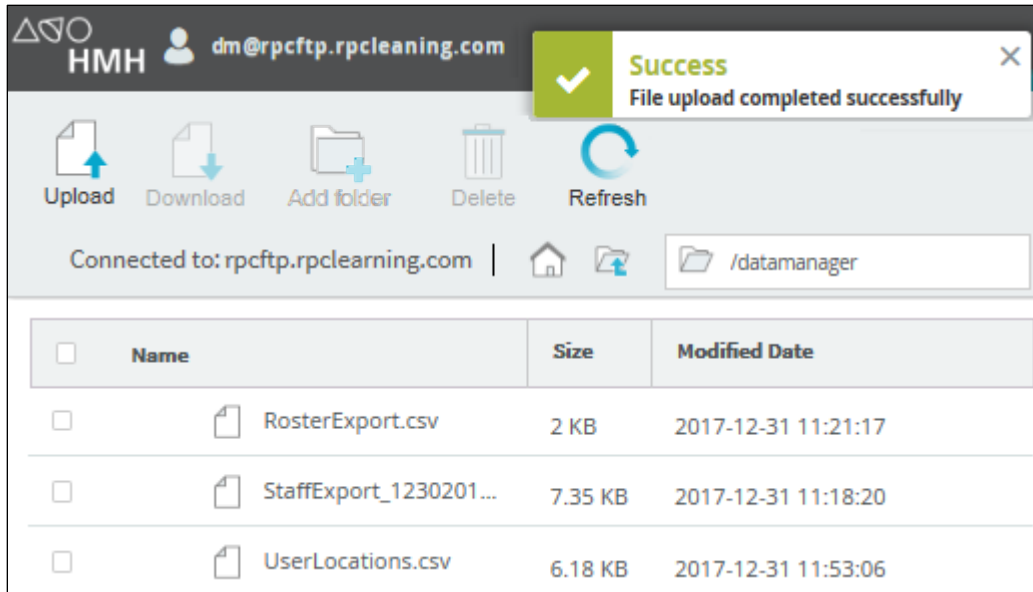
File 2  Browse

---

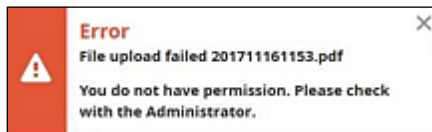
**Note:** To overwrite existing files with matching names in the current folder, click **Overwrite selected Files on the server**.

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6. Click **Upload**. If your upload is successful, a message appears confirming that the file(s) were uploaded successfully. The files are listed in the folder you specified. (Files appear in alphabetical order.)



If your upload is not successful, an error message appears.



Consult your administrator or call the *DataManager* support line at 800.323.9540.

