



Staff/User File Setup: Guidelines for Importing Staff Information

Guidelines for Importing Staff/Users in Riverside *DataManager*

This document was prepared to assist you in using the Staff/User Data File Template to set up your staff information in *DataManager*. Field requirements and descriptions are provided on the following pages.

DataManager is able to import ASCII comma-delimited (.csv) files.

Data from an Excel Spreadsheet data can be saved in .csv format using the "Save as" function in Excel.



When prompted, **enter a file name** for the student file in the space provided, **select CSV (Comma delimited)(*.csv)** from the "Save as type:" menu, and then **click Save**.

The image shows a screenshot of the 'Save As' dialog box in Excel. The 'File name:' field contains '2012 Student Import File.csv'. The 'Save as type:' dropdown menu is set to 'CSV (Comma delimited) (*.csv)'. A 'Save' button is located at the bottom right. Three yellow arrows point to the right from the right side of the dialog box, pointing to the file name field, the save as type dropdown, and the Save button respectively.

File name:	2012 Student Import File.csv	←
Save as type:	CSV (Comma delimited) (*.csv)	←
	Save	←

Here is what the template looks like:

District/ Area*	School/ Building	School/ Building Code	Class	Grade	Code	First Name *	Last Name *	Middle Name	Gender	E-Mail Address *	Password	Roles*	Active User*

Here are the requirements for the fields:

Field	Data Type	Required?	Max. Length/Format	Valid Values / Examples
District/Area*	Alphanumeric	Yes	30	A-Z, 0-9, Blanks, and special characters (see the list at the end of this table) are acceptable
School/Building	Alphanumeric	No	30	A-Z, 0-9, Blanks and special characters (see the list at the end of this table) are acceptable
School/Building Code	Alphanumeric	No	15	A-Z, 0-9 Blanks, dashes and period are acceptable. Displayed in the hierarchy within parenthesis. May be used to avoid duplicates (See examples at the end of this document).
Class	Alphanumeric	No	30	A-Z, 0-9, Blanks and special characters (see the list at the end of this table) are acceptable. Class names must be unique to each class (See example at the end of this document).
Grade	Numeric	No	2	00 to 13
Code	Alphanumeric	No	5	A-Z, 0-9 Blanks, dashes and period are acceptable. Code is displayed in the hierarchy within parenthesis. May be used to avoid duplicates (See examples at the end of this document).
First Name *	Alphanumeric	Yes	20	A-Z, 0-9 Blanks or dashes acceptable
Last Name *	Alphanumeric	Yes	20	
Middle Name	Alphanumeric	No	20	
Field	Data Type	Required?	Max. Length/Format	Valid Values / Examples
Gender	Alphanumeric	No	1	"M" or "F" or "U" (Male/Female/Unknown)

E-Mail Address *	Alphanumeric	Yes	50	Must follow valid email id format e.g., tomjones@abcschool.com
Password	Alphanumeric	No	8 - 10	Min 8 characters, max 10 characters, must contain one number.
Roles*	Alpha/Numeric	Yes	7	A, T, P, D, R are acceptable <ul style="list-style-type: none"> • A: Administrator • T: Teacher • P: Proctor • R: Digital Resource and Reporting Access • D: Digital Resource Access Details on access to specific DataManager functionality are included in the “DataManager Functionality Permissions Table for Account Holder, Administrator, and Teacher Roles” on page 5 and the “DataManager Functionality Permissions Table for Proctor, Digital Resource and Reporting Access, and Digital Resource Access Roles” on page 6.
Active User*	Alpha/Numeric	Yes	1	‘Y’ or ‘N’; blank defaults to ‘Y’

Special Characters allowed for District/Area, School/Building, and Class are:

" # & ' () + ; @ \ < > - _ / .

DataManager Functionality Permissions Table for Account Holder, Administrator, and Teacher Roles

Overview Application									
	Account Holder			Administrator (A)			Teacher (T)		
	Platinum	Data Plus	Basic Data	Platinum	Data Plus	Basic Data	Platinum	Data Plus	Basic Data
Access Digital Resources	<input type="checkbox"/>								
Access Software Help	<input type="checkbox"/>								
Assessments Application									
Search for a Test Event	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Create a New Test Event	<input type="checkbox"/>			<input type="checkbox"/>					
Edit and Delete a Test Event	<input type="checkbox"/>			<input type="checkbox"/>					
Close and Reopen a Test Event	<input type="checkbox"/>			<input type="checkbox"/>					
Add a Student to a Test Event Roster	<input type="checkbox"/>			<input type="checkbox"/>					
Create, View and Edit Test Assignments	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Print Plain Paper Answer Documents	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Print Test Booklets (Interim Assessments)	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Create and Proctor an Online Test Session	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Manage Scanning Sessions	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Resolve Scanning Errors	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
Edit Scanned Item Responses	<input type="checkbox"/>			<input type="checkbox"/>					
Download and Order Form for Scoring Services	<input type="checkbox"/>			<input type="checkbox"/>					
Reports Application									
Create Reports	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Add a Web Reporting Key to a User Account	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Administrative Functionality									
Manage Reporting Access	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				
Search for, Add, and Edit Locations	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				
Search for, Add, and Edit Staff/Users	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				
Create, Deactivate, and Activate Rosters	<input type="checkbox"/>			<input type="checkbox"/>					
Search for, Add, and Edit Students	<input type="checkbox"/>			<input type="checkbox"/>					
Export Test Activity Detail	<input type="checkbox"/>			<input type="checkbox"/>					
Manage Test Activity Notifications	<input type="checkbox"/>			<input type="checkbox"/>					
View License Period (Interim Assessments)	<input type="checkbox"/>			<input type="checkbox"/>					

DataManager Functionality Permissions Table for Proctor, Digital Resource and Reporting Access, and Digital Resource Access Roles

Overview Application									
	Proctor (P)			Digital Resource and Reporting Access (D)			Digital Resource Access (R)		
	Platinum	Data Plus	Basic Data	Platinum	Data Plus	Basic Data	Platinum	Data Plus	Basic Data
Access Digital Resources	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access Software Help	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessments Application									
Search for a Test Event									
Create a New Test Event									
Edit and Delete a Test Event									
Close and Reopen a Test Event									
Add a Student to a Test Event Roster									
Create, View and Edit Test Assignments									
Print Plain Paper Answer Documents									
Print Test Booklets (Interim Assessments)									
Create and Proctor an Online Test Session	<input type="checkbox"/>								
Manage Scanning Sessions									
Resolve Scanning Errors									
Edit Scanned Item Responses									
Download and Order Form for Scoring Services									
Reports Application									
Create Reports				<input type="checkbox"/>	<input type="checkbox"/>				
Add a Web Reporting Key to a User Account				<input type="checkbox"/>	<input type="checkbox"/>				
Administrative (Admin) Functionality									
Manage Reporting Access									
Search for, Add, and Edit Locations									
Search for, Add, and Edit Staff/Users									
Create, Deactivate, and Activate Rosters									
Search for, Add, and Edit Students									
Export Test Activity Detail									
Manage Test Activity Notifications									
View License Period (Interim Assessments)									

Suggestions for eliminating non-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. For example, if you have four different classes with the same name, which is often the case when teachers have common names, then use the **Grade** and **Code** fields to make each class unique as shown below:

Class Name: Smith J	Grade: 2	Code: Code 001
Class Name: Smith J	Grade: 2	Code: Code 002
Class Name: Smith J	Grade: 2	Code: Code 003
Class Name: Smith J	Grade: 3	Code: Code 003

Class names will be checked for uniqueness using a combination of "Class+Grade+Code". Each Class+Grade+Code entry in the Location file must be unique. Code will be applied to any location at the lowest level in your import file. If district is the lowest level in the import file then the code available will be applied to the district.

The District, School/Building, and Class Name fields must be identical on all three data files (Location, Staff/User, and Student).