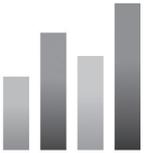


DATA MANAGER™ 

Creating and Submitting Data Files

Version 5



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Acknowledgments

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In order to manage your assessment programs in *Riverside DataManager*[™], you must set up your locations, staff/users, and students and create the proper associations between students, teachers, classes, grades, and buildings. This ensures that students can be assigned to take tests and that results are reported correctly.

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 to use *DataManager*:

- **Location** - Contains the places associated with staff/users and students who are involved in testing.
- **Staff/User** - Contains identification, location, and roles and permissions information for all teachers and staff members who will use *DataManager*.
- **Student** - Contains demographic and location information for students who will be assigned to take tests with *DataManager*.

Note: In some cases, only the Location or Location and Student Data Files are needed, for example:

- You are the only person in your school who requires access to *DataManager*.
 - You are using *DataManager* only to access web reports.
-

Understanding 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 will be reported. The Location and Student Data Files must be prepared in the correct format and submitted to Riverside® in order for a roster to be created. After a roster is created, you can begin setting up test events and test assignments for both online testing and testing with plain-paper answer documents.

When the Location and Student Data Files are submitted to Riverside, Riverside imports the files 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 Data Files must exactly match the location fields provided in the Location Data File.

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 class locations, then you will need a single roster that associates each student with a class location. For example, suppose your school system is planning to administer the *Cognitive Abilities Test™ (CogAT®)* Level 9 to all third graders at Emerson, Longfellow, and Whittier elementary schools and you want the results reported by classroom teacher in each building. You would need a single roster that associates each student with a single classroom teacher. In addition to the Staff/User and Location Data Files, you would need to submit to Riverside 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, suppose your school system is planning to administer the *Riverside® Interim Assessments* for English Language Arts (ELA) and the *Riverside® 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.

About Setting Up Locations

A location in *DataManager* is a place that is associated with staff and students who are involved in testing. You must create locations to be able to set up test events, create test assignments, view web reports, and perform other tasks using *DataManager*.

Note: Prior to setting up locations in a Location Data File, check to see if your locations are already in *DataManager*. To search for a location, log into *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*. You must use the location names exactly as they appear in *DataManager* when you create Location, Staff, and Student data files.

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

- Download the **Location Data File** template
- Enter your location data into the template
- Save the template as a data file
- Upload the data file to the SFTP site

Typically, you 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.

Note: When one teacher replaces another for a particular class, the recommended practice for making that change is to add the new teacher as a new class-level Location using the **Administration** tool within the *DataManager* application. 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 the *System Administration User's Guide*.

Organizational Hierarchy

The arrangement of locations in *DataManager* should reflect the hierarchical organization of your school system and the relationships between classes and school buildings within the school system. Location setup includes six levels that can be used to set up your school system's hierarchy (your organization may 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” on page 11 for more information about roles).

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.

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

Online testing sessions may accommodate students from any number of classes, provided they are being administered the same test level.

Downloading the Location Data File Template

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

To download the Location Data File Template:

1. Open your browser.
2. In the browser address bar, type the following URL:
<http://www.riversidepublishing.com/products/datamanager/>
The **DataManager Product Information** page appears.
3. Scroll down the page to view the **Scoring Package** table. This table provides information regarding the required and optional tools that are available for each scoring package. The Location Data File Template is available in the **Platinum Data Package** section of the **DataManager Product Information** page.
4. Click **Location Data File Template**. The **File Download** dialog box appears asking if you want to open the file or save it to a location on your computer.
5. Click **Save** to download the file to your computer. The **Save As** dialog box appears.
6. Select a folder location on your computer and click **Save** to download the file. Continue with "Creating a Location Data File" below.

Creating a Location Data File

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

	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.

The first file you submit must contain the **District/Area** column. Prior to testing, the first three columns, **District/Area**, **School/Building**, and **Class**, must be completed and submitted to Riverside. The remaining columns are optional and do not require information.

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.

To create a Location data file:

1. Open the **Location Data File Template** in Microsoft Excel.
2. Type or copy location data into the columns. See “Location Data File Template Fields” on page 33. Note the following:
 - School/Building names must be unique. See “Creating Unique School/Building Names” on page 7.
 - Class names must be unique. See “Creating Unique Class Names” on page 7.
 - The **District**, **School/Building** and **Class** fields must be identical in all three data files (Location, Staff/User, and Student).
 - Do not delete columns from the template or change the header text.
 - Commas are not allowed.
 - The following special characters may be used:

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

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, select a location to save the file.
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_mmddy.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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter "default".

mmddy is the date you want associated with the data file, usually today's date.

See "File Naming Conventions for Data Files" on page 31 for more information about naming new data files.

6. In the **Save as** type list, do one of the following:
 - If you are using a PC, select CSV (**Comma delimited**) (***.csv**)
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click **Save**. Continue with "Uploading Data Files" on page 25.

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 uniquely identify each school/building.

DataManager checks for duplicate school/building names based on comparing the following data string for each school/building:

- School/Building + School/Building Code

For example, suppose a single archdiocese contains three different schools with the name "St. Mary's School." To ensure the three schools have unique names, you can 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 + 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	3

All Class + Grade + Code entries in the data file must be unique.

Updating Location Data

After location data is uploaded to *DataManager*, you can modify the data as needed by submitting a new data file containing the data you want to change. For example, you can change the location name, city, or zip code of any location.

To update location data:

1. Open the **Location Data File Template** in Microsoft Excel.
2. Type or copy location data into the columns. See “Location Data File Template Fields” on page 33. Note the following:

- Do not delete columns from the template or change the header text.
- Commas are not allowed.
- The following special characters may be used:

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

- The first file you submit must contain the **District/Area** column. Prior to testing, the first three columns, **District/Area**, **School/Building**, and **Class**, must be completed and submitted to Riverside. The remaining columns are optional and do not require information.
 - The **District**, **School/Building** and **Class** fields must be identical in all three data files (Location, Staff/User, and Student).
 - 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.
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, select a location to save the file.

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

upd_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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter "default".

mmddyy is the date you want associated with the data file, usually today's date.

See "File Naming Conventions for Data Files" on page 31 for more information about naming new data files.

6. In the **Save as type** list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click **Save**. Continue with "Uploading Data Files" on page 25.

About Setting Up Staff/Users

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 “Understanding Roles and Permissions” below.

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 Data File Template** is a Microsoft Excel spreadsheet that will assist you in creating a properly formatted data file.

Understanding 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. Users may perform the tasks allowed for their assigned role on records that are below the user’s location level. See “About Setting Up Locations” on page 3 for more information about location levels.

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.

Roles

A role is a set of permissions that allows users to perform specific tasks within *DataManager*. The user’s role and the data package determine which tasks the user will be able to perform. A user with a given role can perform the tasks associated with that role at his/her level in the location hierarchy and below. 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.

The following pages list the tasks permitted for each role and data package within *DataManager*.

System Administration

Task	Role/Data Package					
	Account Holder			Administrator		
	Platinum	Data Plus	Basic	Platinum	Data Plus	Basic
Manage Reporting Access	✓	✓		✓	✓	
Manage Locations	✓	✓	✓	✓	✓	✓
Add Locations	✓	✓	✓	✓	✓	✓
Search for Location	✓	✓	✓	✓	✓	✓
Edit/Delete Locations	✓	✓	✓	✓	✓	✓
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 (Platinum 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	
	Platinum	Data Plus	Platinum	Data Plus	Platinum	Data Plus	Platinum	Data Plus
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.

Downloading 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 Data File Template** is a Microsoft Excel spreadsheet that will assist you in creating a properly formatted data file.

To download the Staff/User Data File Template:

1. Open your browser.
2. In the browser address bar, type the following URL:
<http://www.riversidepublishing.com/products/datamanager/>
 The **DataManager Product Information** page appears.
3. Scroll down the page to view the **Scoring Package** table. This table provides information regarding the required and optional tools that are available for each scoring package. The Staff/User Data File Template is available in the **Platinum Data Package** section of the **DataManager Product Information** page.
4. Click **Staff/User Data File Template**. The **File Download** dialog box appears asking if you want to open the file or save it to a location on your computer.
5. Click **Save** to download the file to your computer. The **Save As** dialog box appears.
6. Select a folder location on your computer and click **Save** to download the file. Continue with "Creating a Staff/User Data File" on the next page.

Creating a Staff/User Data File

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	District/Area	School/Building	School/Building Code	Class	Grade	Code	First Name *	Last Name *	Middle Name	Gender	E-Mail Address *	Password	Roles *	Active User *
2														
3														

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.

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.

See “Staff/User Data File Template Fields” on page 36 for more information on column descriptions.

To create a Staff/User data file:

1. Open the **Staff/User Data File Template** in Microsoft Excel.
2. Type or copy staff/user data into the columns. See “Staff/User Data File Template Fields” on page 36 for more information on column descriptions. Note the following:
 - Do not delete columns from the template or change the header text.
 - Commas are not allowed.
 - The following special characters may be used:

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

 - 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, select a location to save the file.
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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter "default".

mmddyy is the date you want associated with the data file, usually today's date.

See "File Naming Conventions for Data Files" on page 31 for more information about naming new data files.

6. In the **Save as type** list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click **Save**. Continue with "Uploading Data Files" on page 25.

Updating Staff/User Data

After staff/user data is uploaded to *DataManager*, you can modify the data as needed by submitting a new data file containing the data you want to change. For example, you can change the staff/user e-mail address.

To update staff/user data:

1. Open the **Staff/User Data File Template** in Microsoft Excel.
2. Type or copy user data into the columns. See "Staff/User Data File Template Fields" on page 36 for more information on column descriptions. Note the following:

- Do not delete columns from the template or change the header text.
- Commas are not allowed.
- The following special characters may be used:

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

- 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, select a location to save the file.
5. In the **Filename** box, type a name for the file. The file naming convention for the data file to update staff/user information is as follows:

upd_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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter "default".

mmddyy is the date you want associated with the data file, usually today's date.

See "File Naming Conventions for Data Files" on page 31 for more information about naming new data files.

6. In the Save as type list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click Save. Continue with "Uploading Data Files" on page 25.

About Setting Up Students

Before you can create a test event, you must set up student records in *DataManager*. Student records are linked to specific locations so that you can 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 Data File Template** is a Microsoft Excel spreadsheet that will assist you in creating a properly formatted data file.

Unique Student ID Requirement

Each student record must have a student ID that is unique across your school system. The student ID is a critical data element in *DataManager* that aids in matching student results and the accumulation of test results over time. Student IDs are also important for ensuring prompt turnaround of score reports following test administration. If you will submit separate Student Data Files for each school building within your school system, it is recommended that 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 process subsequent instances of the same student ID as updates to the initial instance of the ID, and the first imported student record will be overwritten with the second student's information.

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 "Understanding Data Files and Rosters" on page 1 for more information about multiple rosters.

Downloading 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 Data File Template:

1. Open your browser.
2. In the browser address bar, type the following URL:
<http://www.riversidepublishing.com/products/datamanager/>
The **DataManager Product Information** page appears.
3. Scroll down the page to view the **Scoring Package** table. This table provides information regarding the required and optional tools that are available for each scoring package. The Student Data File Template is available in the **Platinum Data Package** section of the **DataManager Product Information** page.
4. Click **Student Data File Template**. The **File Download** dialog box appears asking if you want to open the file or save it to a location on your computer.
5. Click Save to download the file to your computer. The **Save As** dialog box appears.
6. Select a folder location on your computer and click **Save** to download the file. Continue with "Creating a Student Data File" below.

Creating a Student Data File

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

	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.

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.

See “Student Data File Template Fields” on page 38 for more information on column descriptions.

To create a Student data file:

1. Open the **Student Data File Template** in Microsoft Excel.
2. Type or copy student data into the columns. See “Student Data File Template Fields” on page 38 for more information on column descriptions. Note the following:
 - Do not delete columns from the template or change the header text.
 - Commas are not allowed.
 - The following special characters may be used:

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

- 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, select a location to save the file.
 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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter “default”.

mmddyy is the date you want associated with the data file, usually today’s date.

See “File Naming Conventions for Data Files” on page 31 for more information about naming new data files.

6. In the **Save as type** list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click **Save**. Continue with “Uploading Data Files” on page 25.

Updating Student Data

After student data is uploaded to *DataManager*, you can modify the data as needed by submitting a new data file containing the data you want to change. For example, you can change the student name, grade, or code of any student.

To update student data:

1. Open the **Student Data File Template** in Microsoft Excel.
2. Type or copy student data into the columns. See “Student Data File Template Fields” on page 38 for more information on column descriptions. Note the following:
 - Do not delete columns from the template or change the header text.
 - Commas are not allowed.
 - The following special characters may be used:

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

- 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, select a location to save the file.
 5. In the **Filename** box, type a name for the file. The file naming convention for the data file to update student information is as follows:

upd_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 e-mail.

testfamily is the test family name. If you plan to use this data file for more than one test family, enter “default”.

mmddyy is the date you want associated with the data file, usually today’s date.

See “File Naming Conventions for Data Files” on page 31 for more information about naming new data files.

6. In the **Save as type** list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
7. Click **Save**. Continue with “Uploading Data Files” on page 25.

Deactivating a Roster

When you deactivate a roster, you will no longer be able to select it when you set up new test events. Typically, you deactivate a roster when the data becomes outdated, such as the beginning of a new school year.

For example, in the current school year students in grade three are associated with specific grade and class assignments. In the next school year, most (if not all) students will advance to grade four and will be associated with new grade and class assignments. Before you can create a new test event to administer tests in the next school year, you will need to upload a new Student Data File with the new grade and class assignments so your roster will be accurate. You should also deactivate the outdated roster so it is no longer available to select when you are creating the new test event.

To deactivate a roster:

1. Open the **Student Data File Template** in Microsoft Excel.
2. Click **File**, and then click **Save As**. The **Save As** dialog box appears.
3. In the **Save in** list, select a location to save the file.
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” on page 31 for more information about naming data files.

5. In the **Save as type** list, do one of the following:
 - If you are using a PC, select **CSV (Comma delimited) (*.csv)**
 - If you are using a Mac, select **Windows Comma Separated (.csv)**
6. Click **Save**. Continue with “Uploading Data Files” on page 25.

About the SFTP Site

The secure file transfer (SFTP) application is a web-based service that provides a secure location for uploading your data files so that Riverside can retrieve them and import them into *DataManager*.

After your data files are uploaded to the SFTP server, the process to create a roster continues with the following steps:

- The SFTP system automatically notifies the *DataManager* Operations team that data files have been uploaded and are available for validation.
- The *DataManager* Operations team retrieves the data files and completes a series of checks to validate the data. If there are errors in the data files, the *DataManager* Operations team may correct the errors, or if the errors are extensive, they may return the file to you to correct.
- The *DataManager* Operations team imports the data files into *DataManager* and the Account Holder receives an e-mail with instructions to log on to *DataManager*.

Logging In to the SFTP Site

Before you log in to the SFTP server for the first time, you will need a temporary username and password. Confirm that you have received an e-mail from Riverside that contains temporary username and password instructions for accessing the site.

To log in to the SFTP server:

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

<http://rpcftp.rpclearning.com>

The **SFTP Log In** page appears.



1PSWITCH
File Transfer
WS_FTP Server
Web Transfer Client

Username

Password

Language

Remember my password

Login

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

The **Transfer** page appears.



Continue with “Managing the SFTP Site” on page 27.

Managing the SFTP Site

When you log in to the SFTP site for the first time, your “home” folder is the only existing folder in your account. The SFTP web interface provides seven control buttons that allow you to manage folders and organize your files.



The table below describes each of the control buttons and how you can manage your files on the SFTP site.

Control Button	Purpose	Steps
NEW FOLDER	Create a new folder	<ol style="list-style-type: none"> 1. Click NEW FOLDER. The NEW FOLDER dialog box appears. 2. In the folder name box, type the name of the folder. 3. Click OK. A message appears confirming that the folder was created successfully.
RENAME	Rename a folder	<ol style="list-style-type: none"> 1. Click RENAME. The RENAME FOLDER dialog box appears. 2. In the folder name box, type the new name of the folder. 3. Click OK. A message appears confirming that the folder was renamed successfully.
DELETE	Delete a folder	<ol style="list-style-type: none"> 1. Click DELETE. A message appears confirming that you want to delete the folder. 2. Click OK.
REFRESH	Refresh the file listing in a folder	Click REFRESH .

Continued on next page...

Control Button	Purpose	Steps
GO	Enter a folder name and navigate to an existing folder	<ol style="list-style-type: none"> 1. In the Current Folder box, type the path and name of the folder you want to navigate to. 2. Click GO. The folder appears in the Current Folder area.
UP	Navigate up one level in the folder structure	Click UP . The Current Folder area displays the contents of the folder that is one level above the current location.
HOME	Navigate to the home folder	Click HOME . The Current Folder area displays the contents of the home folder.

Navigating the SFTP Site

The SFTP web interface has three buttons (GO, UP, and HOME) that allow you to navigate within your folder structure.

To navigate between folders on the SFTP site:

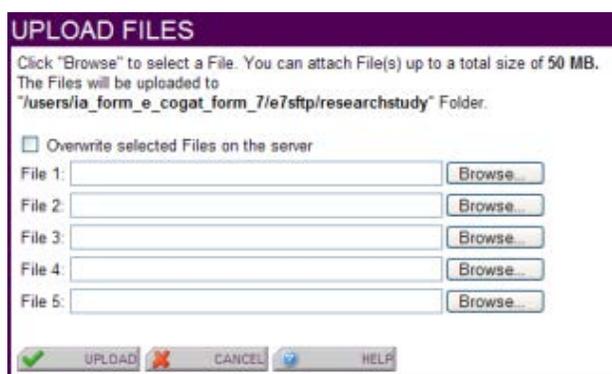
The table below describes each of the navigation buttons and the steps to navigate between folders:

Navigation Button	Purpose	Steps
GO	Enter a folder name and navigate to an existing folder	<ol style="list-style-type: none"> 1. In the Current Folder box, type the path and name of the folder you want to navigate to. 2. Click GO. The folder appears in the Current Folder area.
UP	Navigate up one level in the folder structure	Click UP . The Current Folder area displays the contents of the folder that is one level above the current location.
HOME	Navigate to the home folder	Click HOME . The Current Folder area displays the contents of the home folder.

Uploading Data Files to the SFTP Server

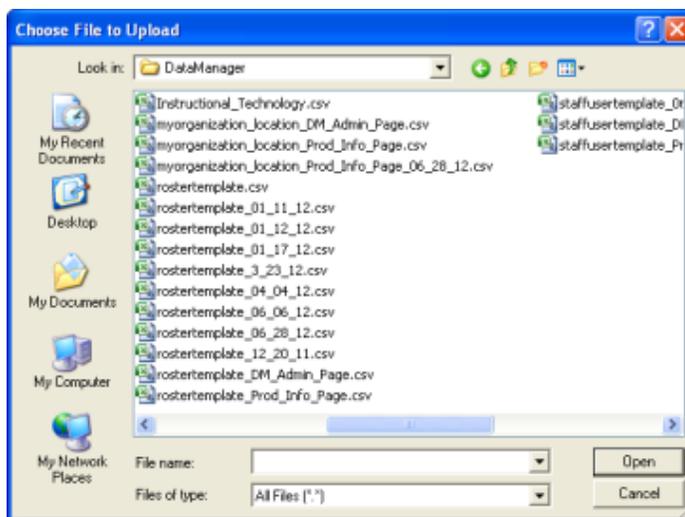
To upload data files to the SFTP site:

1. On the SFTP site, navigate to the folder where you want to upload your files. See “Managing the SFTP Site” on page 27 for instructions about how to use the SFTP control buttons.
2. Click the **UPLOAD FILES** button. The **UPLOAD FILES** dialog box appears.



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

3. In the **File** box, click **Browse**. The **Choose File to Upload** dialog box appears.



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.

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

6. Click **UPLOAD**. A message appears confirming that the files were uploaded successfully and the files are listed in the folder you specified.



File Naming Conventions for Data Files

When you create new data files, it is important that you name the files according to the file naming convention described below so that Riverside can import your data files into *DataManager* successfully. The file naming convention for *DataManager* data files is as follows:

action_myrpcftpname_testfamily_filetype_mmddyy.csv

The valid values for each section of the filename are described in the following table.

Filename Section	Accepted Values	Details
action	new	File is a new data file
	upd	File is an update to an existing data file
	deactivate	File deactivates an existing roster (Student Data File only)
myrpcftpname	RPCFTP username	Username for secure FTP site on RPCFTP
testfamily	iowa	<i>Iowa Assessments™</i> , Form E
	cogat	<i>Cognitive Abilities Test (CogAT)</i> , Form 7
	riaela	<i>Riverside Interim Assessments</i> , English Language Arts
	riamath	<i>Riverside Interim Assessments</i> , Math
filetype	location	File is a Location Data File
	staff	File is a Staff/User Data File
	student	File is a Student Data File
mmddyy	Valid date in mmddyy format	The date associated with the data file, usually the date the file was created

Example - New Data File

New Student Data File for *Iowa Assessments* testing for District 220:

new_district220rpcftp_iowa_student_020212.csv

Note: When Riverside imports the Location and Student Data Files into *DataManager*, a roster named **district220rpcftp_iowa_020212** is created.

Example - Update Data File

Update to location data for an existing *Riverside Interim Assessments* Math roster named **district220rpcftp_riamath_091811**:

upd_district220rpcftp_riamath_location_091812.csv

Example - Deactivate Data File

Deactivation of the district220rpcftp_cogat_041012 roster:

deactivate_district220rpcftp_cogat_student_041012.csv

Location Data File Template Fields

Field descriptions for the Location Data File Template

Important: The location data you enter (the District/Area, School/Building, and Class columns) must be identical across all templates (Location, Staff/User, and Student). For example, if the Location Data File has a school named Oak Hill Elementary, the school must be entered as Oak Hill Elementary in the Staff/User and Student Data Files, and not as Oak Hill or Oak Hill Elem.

Field Name	Description	Maximum Field Length	Valid Values	Sample Entries
District/Area*	Enter the name of the District or Area (required).	30	A–Z, 0–9, blanks, and special characters acceptable	Lakeview
School/Building*	Enter the school name or building. Both numbers and letters can be entered (required).	30	A–Z, 0–9, blanks, and special characters acceptable	Horace Greely School
School/Building Code	Use to uniquely identify schools or buildings and to avoid duplicates. Code is displayed in the hierarchy within parenthesis (optional).	15	A–Z, 0–9, dashes, and period acceptable	StMary02
Class*	Enter the classroom number or the teacher’s name or both (required). See “Class-level Guidelines” on the following page.	30	A–Z, 0–9, blanks, and special characters acceptable; class names must be unique	Mrs. Smith Mrs. Smith 203
Grade*	Enter a grade assignment that corresponds to the class level location (required).	2	00 to 13	05 11

* Required fields; required fields for Location files may vary based on your school system's specific account.

Continued on next page...

Field descriptions for the Location Data File Template, *continued*

Field Name	Description	Maximum Field Length	Valid Values	Sample Entries
Code	Use to uniquely identify each class and to avoid duplicates. Code is displayed in the hierarchy within parenthesis (optional).	5	A–Z, 0–9, blanks, dashes, and period acceptable	001
Address	Enter the street address for the location, including PO box number, unit or suite number (optional).	40	A–Z, 0–9, blanks, dashes, and all special characters acceptable	653 W. Melrose St.
City	Enter the city of the location (optional).	20	A–Z, 0–9, blanks, and dashes acceptable	Chicago
State	Enter the state of the location. The two letter state abbreviation is used in this field (optional).	2	A–Z acceptable	IL
Zip Code	Enter the zip code of the location (optional).	10	Five Numeric or Five Numeric plus "-" and Four numeric (for example, 12345-6789)	60657 60657-0434

* Required fields; required fields for Location files may vary based on your school system's specific account.

Class-level Guidelines

Class-level locations are required, but do not need to correspond to a single classroom teacher assignment. You may format class data to reflect a homeroom assignment:

- Mrs. Anderson

You may also format course data to reflect a course period:

- Mrs. Anderson Math P1
- Mrs. Anderson Math P2

In some cases, such as district-wide screening for participation in gifted and talented programs or high school testing, reporting of test results for a classroom teacher may not be necessary. You may instead choose to set up class-level locations as a whole grade:

- Grade 10

For each class listed in the Class column, you must enter a grade in the Grade column. If a teacher is responsible for testing students in more than one grade, make separate entries that identify each grade they teach in the Class column:

- Mrs. Wilson G4
- Mrs. Wilson G5

Staff/User Data File Template Fields

Field descriptions for the Staff/User Template

Field Name	Description	Max. Field Length	Valid Values	Sample Entries
District/Area*	Enter the name of the District or Area (required).	30	A–Z, 0–9, blanks, and special characters acceptable	Lakeview
School/Building	Enter the school name or building. Both numbers and letters can be entered (optional).	30	A–Z, 0–9, blanks, and special characters acceptable	Horace Greely School
School/Building Code	Use to uniquely identify schools or buildings and to avoid duplicates. Code is displayed in the hierarchy within parenthesis (optional).	15	A–Z, 0–9, blanks, dashes, and period acceptable	StMary02
Class	Enter the classroom number, the teacher’s name, or both (optional).	30	A–Z, 0–9, blanks, and special characters acceptable; class names must be unique	Mrs. Smith Mrs. Smith 203
Grade	Enter the number for the grade associated with user (optional).	2	00 to 13	07
Code	Use this field to uniquely identify each class and to avoid duplicate class names. Code is enclosed in parenthesis when displayed in <i>DataManager</i> (optional). See “Creating Unique Class Names” on page 7.	5	A–Z, 0–9, blanks, dashes, and period acceptable	001
First Name*	Enter the first name of the user (required).	20	A–Z, 0–9, blanks, and dashes acceptable	Kimberly
Last Name*	Enter the last name of the user (required).	20	A–Z, 0–9, blanks, and dashes acceptable	Johnson

* Required fields

Continued on next page...

Field descriptions for the Staff/User Template, *continued*

Field Name	Description	Max. Field Length	Valid Values	Sample Entries												
Middle Name	Enter the middle name of the user (optional).	20	A–Z, 0–9, blanks, and dashes acceptable	Anne												
Gender	Enter M for male, F for female, or U for unknown (optional).	1	M, F, or U	F												
E-Mail Address*	Enter the e-mail address (required).	50	Must follow valid e-mail format	tjones@abcschool.com												
Password	Enter a password for the user (optional).	8-10	A–Z, 0–9; must contain one number	TJabc123												
Roles*	<p>Enter the letter designation of the user's role (required).</p> <table border="1"> <thead> <tr> <th>Role</th> <th>Letter</th> </tr> </thead> <tbody> <tr> <td>Administrator</td> <td>A</td> </tr> <tr> <td>Proctor</td> <td>P</td> </tr> <tr> <td>Teacher</td> <td>T</td> </tr> <tr> <td>Digital Resource Access</td> <td>D</td> </tr> <tr> <td>Digital Resource and Reporting Access</td> <td>R</td> </tr> </tbody> </table>	Role	Letter	Administrator	A	Proctor	P	Teacher	T	Digital Resource Access	D	Digital Resource and Reporting Access	R	1	A, P, T, D, or R	A
Role	Letter															
Administrator	A															
Proctor	P															
Teacher	T															
Digital Resource Access	D															
Digital Resource and Reporting Access	R															
Active User*	Enter "Y" or "N" to indicate if the user is active (required).	1	Y or N	Y												

* Required fields

Student Data File Template Fields

Student Field Guidelines

- Student location information fields, such as District/Area, School/Building, and Class, provide the data that match a student to a location in the Location Data File. When you enter student location information, ensure that each location you provide is an exact match to the locations in the Location Data Files or locations that have already been imported into *DataManager*.
- The student grade value must match a class-level location with the same grade value in the Location Data File. This ensures that your students are properly imported into a class with a matching grade level and helps prevent scoring problems.
- **Gender** is the only required field that you can use to filter score reports. If additional data disaggregation is needed, you should include student program participation and ethnicity/race data for each student. For even more coding flexibility, you can use the Test Administrator Use Only (Test Admin) fields to create any number of unique coding attributes that will be available as filters for score reports.

Field descriptions for the Student Data File Template

Column	Field Name	Description	Max. Field Length	Valid Values	Sample Entries
A	District/Area*	Enter the name of the District or Area (required).	30	A–Z, 0–9, blanks, and special characters acceptable	Lakeview
B	School/Building*	Enter the school name or building (required).	30	A–Z, 0–9, blanks, and special characters acceptable	Horace Greely School
C	School/Building Code	Use to uniquely identify schools or buildings and to avoid duplicates. Code is displayed in the hierarchy within parenthesis (optional).	15	A–Z, 0–9, blanks, dashes, and period acceptable	StMary02

* Required fields

Continued on next page...

Field descriptions for the Student Data File Template, *continued*

Column	Field Name	Description	Max. Field Length	Valid Values	Sample Entries
D	Class*	Enter the classroom number, the teacher's name, or both (required).	30	A–Z, 0–9, blanks, and special characters acceptable; class names must be unique	Mrs. Smith Mrs. Smith 203
E	Code	Use this field to uniquely identify each class and to avoid duplicate class names. Code is enclosed in parenthesis when displayed in <i>DataManager</i> (optional). See "Creating Unique Class Names" on page 7	5	A–Z, 0–9, blanks, dashes, and period acceptable	001
F	First Name*	Enter the first name of the student (required).	20	A-Z acceptable	Kimberly
G	Last Name*	Enter the last name of the student (required).	20	A-Z acceptable	Johnson
H	Middle Name	Enter the middle name of the student (optional).	20	A-Z acceptable	Anne
I	Unique Student ID*	Enter the student's unique ID number (required).	10	A-Z, 0-9, blanks, and dashes acceptable	ABC1234567
J	Date of Birth*	Enter the student's date of birth (required).	10	mm/dd/yyyy	02/17/2001
K	Gender*	Enter M for male, F for female, or U for unknown (required).	1	M, F, or U	F

* Required fields

Continued on next page...

Field descriptions for the Student Data File Template, *continued*

Column	Field Name	Description	Max. Field Length	Valid Values	Sample Entries
L	Grade*	Enter the student's current grade (required).	2	0-13	11
M	Active User	Enter Y or N to indicate if the student is active (optional).	1	Y or N; if left blank, defaults to N	Y
N	Additional ID Number	If available, enter an additional student ID number (optional).	10	A-Z, 0-9, blanks or dashes acceptable	ABC1234567
O	Ethnicity-Hispanic or Latino	Enter Y or N to indicate if the student is Hispanic or Latino (optional).	1	Y or N; if left blank, defaults to N	Y
P	Race-American Indian or Alaska Native	Enter Y or N to indicate if the student is American Indian or Alaska Native (optional).	1	Y or N; if left blank, defaults to N	Y
Q	Race-Asian	Enter Y or N to indicate if the student is Asian (optional).	1	Y or N; if left blank, defaults to N	N
R	Race-Black or African American	Enter Y or N to indicate if the student is Black or African American (optional).	1	Y or N; if left blank, defaults to N"	Y
S	Race-Native Hawaiian or Other Pacific Islander	Enter Y or N to indicate if the student is Native Hawaiian or Other Pacific Islander (optional).	1	Y or N; if left blank, defaults to N	N

Continued on next page...

Field descriptions for the Student Data File Template, *continued*

Column	Field Name	Description	Max. Field Length	Valid Values	Sample Entries
T	Race-White	Enter Y or N to indicate if the student is White (optional).	1	Y or N; if left blank, defaults to N	N
U-AE	Program fields	Enter Y or N to indicate if the student is in the specified Program (optional).	1	Y or N; if left blank, defaults to N	Y
AF	Braille	Enter Y or N to indicate if the braille version of the test is administered (optional).	1	Y or N; if left blank, defaults to N	N
AG-AV	Office Use fields	Enter Y or N to indicate an Office Use Fields (optional).	1	Y or N; if left blank, defaults to N	N
AW-BB	Test Admin fields	Enter a number from 0 through 9 to indicate a unique coding attribute (optional).	1	0 through 9 or blank	2
BC-BI	Test Admin fields	Enter a number from 0 through 99 to indicate a unique coding attribute (optional).	2	0 through 99 or blank	99
BJ	Test Admin fields	Enter a number from 0 through 9 to indicate a unique coding attribute (optional).	1	0 through 9 or blank	9
BK-CD	Admin Code fields	Enter Y or N to indicate an Administration Code (optional).	1	Y or N; if left blank, defaults to N	N



**Houghton
Mifflin
Harcourt**

Riverside