
Chapter 5: Rosters

Rosters connect students to educators (users) in Educator Portal. Before rosters are entered, both educators and students must be entered into Educator Portal. Rosters can be viewed, edited, created manually, or created through an upload process.

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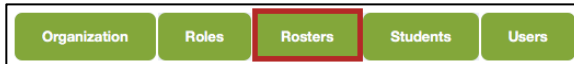
Viewing a Roster

To view a roster, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Rosters tab.



4. In the Select Action drop-down menu, click View Roster.
5. Select the organization information.

6. Click Search.
7. Click once on the roster row you need to view.

Roster Name	Educator Identifier	First Name	Last Name	Subject

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Uploading Rosters Using a CSV File

Note: Depending upon your program, organization, and role, you may not be able to access this function. If the action does not display in the drop-down menu, the procedure is not allowed.

If you have sufficient access privileges, you can upload one or more rosters at a time using a CSV file available on your organization's website. You will need to complete the CSV file using software outside of Educator Portal.

Roster CSV File Format

All column headings are required, but some columns do not require data. The CSV Col column is included to help you organize your CSV file.

Note: The Data Req? column indicates if the spreadsheet must have data in a particular column.

CSV Col.	Column Heading	Data Req?	Format of Valid Entries	Definition
A	Roster Name	Y	Alphanumeric	The name for the roster.
B	Subject	Y	Alphanumeric	The subject code assigned by the state. Valid entries include ELA, M, SCI, and SS.
C	Course	N	Alphanumeric	The identification code for a particular course. <div style="border: 1px dashed black; padding: 5px; width: fit-content; margin: 5px auto;"> Hint: Course is not a required field. A course should only be entered if directed to do so by your assessment program. </div>
D	School Identifier	Y	Alphanumeric	Identification code assigned by the state (or other organization) that indicates the school the student attends. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 5px auto;"> Note: The entry must match an entry in Educator Portal. </div>
E	School Year	Y	YYYY	The four-digit ending year of the current school year (e.g., for the 2015–2016 school year, enter 2016).

CSV Col.	Column Heading	Data Req?	Format of Valid Entries	Definition
F	State Student Identifier	Y	Numeric	The student's state identification number.
G	Local Student Identifier	N	Numeric	Unique code assigned to the student by the school or local education agency.
H	Student Legal First Name	Y	Alphanumeric	The student's first name.
I	Student Legal Last Name	Y	Alphanumeric	The student's last name.
J	Educator Identifier	Y	Alphanumeric	The educator's identification number. <hr/> Note: This number should match a user in Educator Portal. <hr/>
K	Educator First Name	Y	Alphanumeric	The educator's first name.
L	Educator Last Name	Y	Alphanumeric	The educator's last name.
M	Remove from roster	N	Remove	If the information should be removed from a roster, type Remove in this column. Otherwise, the column should remain blank.

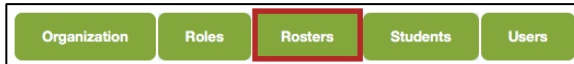
Uploading a Roster File

To upload a roster file, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Rosters tab.



4. In the Select Action drop-down menu, click Upload Roster.
5. Select the organization information.

6. In the File field, click the CSV icon.

7. Select the appropriate CSV file.

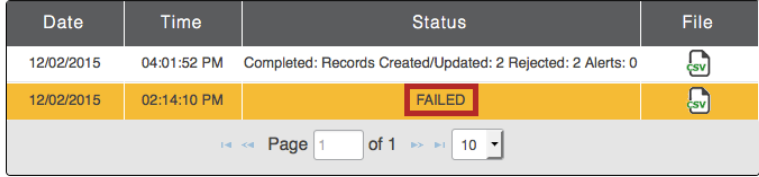
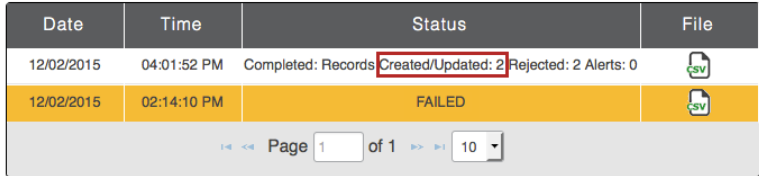
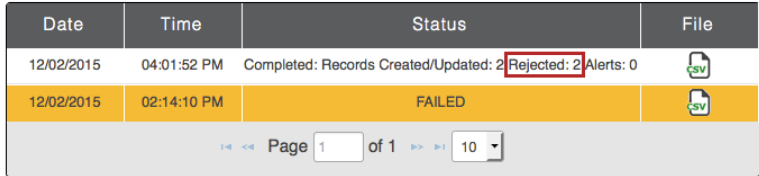
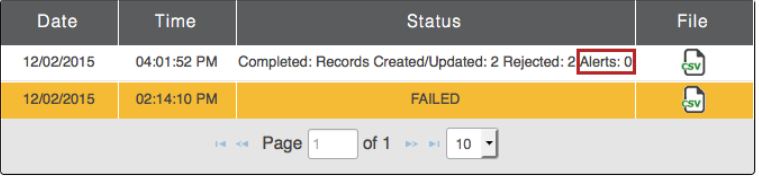
Note: Verify that the file has a .csv file extension.

8. Click OK.
9. Click Upload.

Reviewing Roster File Upload

The final step to uploading a roster file is to verify that all reports uploaded successfully. Information on error messages is located in Chapter 8: Messages.

Hint: The brackets ([]) indicate that information specific to your upload, testing program, or state will be displayed in the message.

Status Message	Description	Image
Failed	The CSV file failed to upload. Click the CSV file under the file column.	 A screenshot of a table with columns: Date, Time, Status, and File. The first row shows a successful upload: 12/02/2015, 04:01:52 PM, Completed: Records Created/Updated: 2 Rejected: 2 Alerts: 0, and a CSV icon. The second row shows a failed upload: 12/02/2015, 02:14:10 PM, FAILED, and a CSV icon. A pagination bar at the bottom shows 'Page 1 of 1' and a dropdown menu set to '10'.
Created/Updated: [value]	Records were created successfully.	 A screenshot of a table with columns: Date, Time, Status, and File. The first row shows a successful upload: 12/02/2015, 04:01:52 PM, Completed: Records Created/Updated: 2 Rejected: 2 Alerts: 0, and a CSV icon. The second row shows a failed upload: 12/02/2015, 02:14:10 PM, FAILED, and a CSV icon. A pagination bar at the bottom shows 'Page 1 of 1' and a dropdown menu set to '10'. The value '2' in the status of the first row is highlighted with a red box.
Rejected: [value]	Records were rejected. Click the CSV file under the file column.	 A screenshot of a table with columns: Date, Time, Status, and File. The first row shows a successful upload: 12/02/2015, 04:01:52 PM, Completed: Records Created/Updated: 2 Rejected: 2 Alerts: 0, and a CSV icon. The second row shows a failed upload: 12/02/2015, 02:14:10 PM, FAILED, and a CSV icon. A pagination bar at the bottom shows 'Page 1 of 1' and a dropdown menu set to '10'. The value '2' in the status of the first row is highlighted with a red box.
Alerts: [value]	Records were created successfully, but another issue exists. Click the CSV file under the file column.	 A screenshot of a table with columns: Date, Time, Status, and File. The first row shows a successful upload: 12/02/2015, 04:01:52 PM, Completed: Records Created/Updated: 2 Rejected: 2 Alerts: 0, and a CSV icon. The second row shows a failed upload: 12/02/2015, 02:14:10 PM, FAILED, and a CSV icon. A pagination bar at the bottom shows 'Page 1 of 1' and a dropdown menu set to '10'. The value '0' in the status of the first row is highlighted with a red box.

Creating a Roster Manually

Note: Depending upon your program, organization, and role, you may not be able to access this function. If the action does not display in the drop-down menu, the procedure is not allowed.

To create a roster manually (i.e. one at a time), perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Rosters tab.



4. In the Select Action drop-down menu, click Create Roster.
5. Select the organization information.

 A form titled 'Create Roster' with the following elements:

- Three dropdown menus at the top: 'STATE:*', 'DISTRICT:*', and 'SCHOOL:*', each with a yellow arrow icon.
- A blue 'Search' button.
- Three input fields: 'ROSTER NAME:*' (text), 'SUBJECT:*' (dropdown with 'Select' option), and 'COURSE:' (dropdown with 'Select' option).
- Two labels: 'SELECT EDUCATOR*' and 'SELECT STUDENTS*'.
- A blue 'Save' button at the bottom.

6. Click Search.

7. In the Roster Name field, type a name for the roster.
8. In the Subject menu, select the subject area.

Hint: Course is not a required field. A course should only be entered if instructed to do so by your assessment program.

STATE: * DISTRICT: * SCHOOL: *

Search

ROSTER NAME: * SUBJECT: * COURSE: *

9. Click the checkbox next to the appropriate educator.

SELECT EDUCATOR *

	First Name	Last Name	Educator Identifier	status	Email
<input checked="" type="checkbox"/>					
<input type="checkbox"/>					

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10. Click the checkbox(s) next to the appropriate student(s).

SELECT STUDENTS *

	Student Identifier	First Name	Middle Name	Last Name	Gender	Grade Course
<input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/>						

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Save

11. Click Save.

Editing a Roster

Note: Depending upon your program, organization, and role, you may not be able to access this function. If the Save button does not display, the procedure is not allowed.

To edit a roster, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Rosters tab.



4. In the Select Action drop-down menu, click View Roster.
5. Select the organization information.

6. Click Search.
7. Click once on the roster row you need to view.

Roster Name	Educator Identifier	First Name	Last Name	Subject

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8. On the View/Edit Roster window, review or make changes as needed.

Note: If you clear a checkbox, the educator or student will be removed from the roster. If all students are removed from the roster, it will be deleted.

9. When you are finished making changes, click Save.

Changes to the Chapter

The following table lists the changes made to this chapter since the last major release of the documentation.

Note: The Page column indicates the page number of the current manual where the change appears.

Change Logged	Page	Description of Change
3/3/17	5.3	Removed note.
3/3/17	5.5	Removed course code table.
3/3/2017	5.9	Added note about empty roster deletion.