



Why YellowFolder needs a CSV file from your District, and the best way to format & send.

The YellowFolder system can work directly with your existing electronic management systems to automate the tedious tasks of creating new student folders, assigning access rights, and managing student retention.

In order for the YellowFolder system to handle these functions, the school district must provide YellowFolder with a Comma Separated Value (CSV) spreadsheet of the district's current student information and current district personnel to be given account.

The YellowFolder system cannot function at full capacity without these CSV files, as they provide the most current organizational foundation so

each student has an on-line cumulative record and each employee has assigned access privileges. Once the district's two CSV files are uploaded into the YellowFolder system, the scanned and uploaded documents can automatically be filed in the correct student's folder and the correct district employee will have the access they need.

It's important to have the CSV files routinely provided to us to keep information current for accurate filing of documents and access to folders. We recommend sending them automatically, daily or weekly at a minimum. The system's accuracy can only be as good as the last CSV file received.

How to format your CSV file for Student Record:

Only Allowed Characters are '-_ (apostrophe, hyphen and underscore)

Column Order	YF Fields	Field Format	Definition
1	FirstName	*text	
2	LastName	*text	
3	MiddleName	*text	
4	Alias	*text	Can be used for other names like nicknames.
5	DateofBirth	Date	Student Date of Birth (m/d/yyyy)
6	IdentificationNumber	Alpha, Numeric or both	Identification Number that the ISD will use
7	Campus	*text	Current Campus (Name not number code) ex. ABC Elementary
8	GraduationDate	Date	Required if Student is Archive (m/d/yyyy)
9	WithdrawalDate	Date	Required if Student is Archive (m/d/yyyy)
10	ApplicableSchoolYear	Numeric	Current school year. (yyyy)
11	Status	Alpha	Current Status of Student (Value preferred, not number code) ex. Active or Archive
12	Grade	Alpha, Numeric or both	Current Grade Level (4, 4th, 4A, 4-A) acceptable

YellowFolder is happy to provide examples and templates to help make this process easier for you.

Example of how to format your CSV file for access roles:

	UserType	Title	FirstName	LastName	Email	AccessRole
1	RSA	Director of Student Services	Robert	Jones	rjones@yellowfolder.com	Administrator
2	RMO	Assistant to the Director	Susan	Tyler	styler@yellowfolder.com	Medical
3	User	Registrar	Pam	Bell	pbell@yellowfolder.com	Teacher
4						

How to send your CSV file to YellowFolder

YellowFolder SFTP (*Secure File Transfer Protocol*)

Systems like Skyward and EMPOWER have reporting capabilities. Those reports can then be exported using methods like SFTP or exporting locally to a server. If exporting to a local machine or server is the only option, then using free software like WinSCP can be used to schedule a task to SFTP the CSV files to YellowFolder.

YellowFolder will create an account and password on a YellowFolder SFTP server to receive the CSV files. It is one connection per school system so every Record Series (*in your district Student Records, Human Resources Records, SPED Records, Administrative Records*) will share the same location unless instructed otherwise.

SFTP Information:

Host = YFSFTP or 40.129.178.107

Port = 22

Username = Provided by Implementation Specialist or Support

Password = Provided by Implementation Specialist or Support