

# Import and Export User Guide

## PowerSchool Student Information System



**PowerSchool**

## Document Properties

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Owner	Technical Communication and Documentation
Last Updated	8/10/2004
Version	4.0

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## Introduction

Use PowerSchool Help to learn the PowerSchool Student Information System (SIS) and to serve as a reference for your daily work. However, before you can begin using PowerSchool, the PowerSchool administrator at your school must set up the system and import the data from your previous system. Once those steps are complete, you can start using PowerSchool. Use PowerSchool Help to assist you in navigating in PowerSchool.

PowerSchool Help is updated as PowerSchool is updated. Not all versions of PowerSchool Help are available in a printable guide. For the most up-to-date information, click Help on any page in PowerSchool.

There are user guides available that include the same information as PowerSchool Help for each major release of PowerSchool. These user guides include instructions for certain user roles, though these roles will vary depending on your school or district's circumstances. For the most recent version of the printable guides, visit the PowerSchool Customer Support web site at <https://www.powerschool.com/support/documentation/userguides/>. This URL is case-sensitive.

**Note:** You need a username and password to view anything on the PowerSchool Customer Support web site. Contact your PowerSchool administrator for access.

You are encouraged to read each section of the help that pertains to you. While the introductory sections build a foundation of knowledge that you will use every time you log on to PowerSchool, the remaining sections are independent of each other and can be read in any order. However, if you have never used PowerSchool before, it will be most helpful if you start with the section "[Introduction to PowerSchool](#)." Whenever you read this guide, keep the following points in mind:

- The actions you can perform in PowerSchool depend on your job responsibilities and subsequently on your level of access to PowerSchool. Some users only have viewing rights to some pages. Others can view or edit any page. Still other users can view or edit any page, and create new ones as well. Finally, some pages are view-only for everyone. This guide outlines viewing, editing, and creating options for most pages. Depending on your needs and your level of access, only certain options will be applicable and available to you. If you find that your work requires a greater level of access, contact the system administrator at your school.
- Almost all of the activities described in this guide begin by selecting the appropriate student or group; thus, it is imperative that you understand how to search for and select a student. For detailed instructions on how to do this, refer to the section "[Search and Select](#)."
- The school and student records used in this guide differ from those displayed on your page as you work. You will work with real data based on student records at your school. The graphics in this guide are only examples.
- In PowerSchool, different pages provide some of the same information because you view the same data from a different place each time. If you add, change, or delete data on one page, it will be added, changed, or deleted on other pages that contain the same field(s) of data.

- The reporting features described in this guide are some of the most important you will use in the system. A PowerSchool report is a statement of student or staff records that is produced for viewing or printing and can include information text in addition to the report listings. PowerSchool reports include report cards, lists of class schedules, lunch balance sheets, mailing labels, lists of current staff members, and attendance records.
- Use PowerSchool to create numerous types of reports that pull selected data quickly and easily. Select from a list of pre-configured reports that have preset parameters or create a custom report to include parameters needed for a specific task. You should read the sections "**Custom Reports**" and "**Pre-Configured Reports**" before creating a report.

## Legend

- This guide uses the > symbol to move down a menu path. Thus, if instructed to "Click File > New > Window", begin by clicking the File menu. Then, click New and Window. The option noted after the > symbol will always be on the menu that results from your previous selection.
- It is easy to identify notes because they are indented and prefaced by the text **Notes:**.

## Audience

This document is intended for school administrators and system administrators.

## Import and Export

Use PowerSchool's importing functions to submit large amounts of information into the system. Use the exporting functions to retrieve large amounts of information from the system. Before importing or exporting, keep the following concepts in mind.

### Select a Group

Before you can import or export, you must select a group of students whose records you want to review. For more information, see the section "[Search and Select](#)."

### Importing and Enrollment Dates

You can import student information into PowerSchool using [Quick Import](#) or [AutoComm](#). When you import a student record that has an enrollment date prior to or "less than" the current date, the student record is considered "historical." Historical student records are considered inactive students. Therefore, when searching for such students, your search criteria must start with a slash ("/") to search all student records.

### Student Number Field

The student number field is essential to moving all of the data in PowerSchool. This field matches student data to the correct student with absolute certainty. Each student has only one number, and everything in PowerSchool is linked to this number. Thus, you are strongly encouraged to include the student\_number field in all documents that you export. You must include the student number in any document that includes data you want to import into PowerSchool. Keep this in mind when exporting, especially if you will want to import the data back into PowerSchool after you have worked with it in your spreadsheet application.

### Enroll Status Field

The enroll status field indicates a student's current enrollment status, which defines the student's entire basis in school. Enroll status codes include:

- 0 = Active
- 1 = Inactive (Pre-registered student. Entry date is in the future.)
- 2 = Inactive (Students who transferred out of the current school.)
- 3 = Graduated Students (Students moved to "Graduated Students" school.)
- 4 = Imported as Historical

More often than not, the only time you will see this code is if you are working within the database. However, you may encounter the code within the student pages of the application for students with an enroll status other than Active, such as Inactive, Graduated Students, or Imported as Historical. In which case, the code appears at the top of the page. This field is used throughout the application and is a key element in searching or querying students.

## Field Names

The importance of spelling field names correctly is noted in other sections. Case is unimportant in field names, but spelling must be exactly as noted on the field list. If you omit the underscore, misspell words, or enter a field name that is different than what exists in the field list, then PowerSchool cannot find the field and it will not be imported into or exported from the PowerSchool database. If you do not know how a specific field name is written, click View Field List on the PowerSchool start page.

## Special Export Codes

Use special export codes to include a student's GPA or other calculated value in your import or export. For a list of codes, see the following website:

<http://help.powerschool.com/viewtopic.html?t=codelist>.

## Data Versus Reports

Importing or exporting data is different than importing or exporting report templates. When you import or export data, you move information between a spreadsheet application and your PowerSchool database. When importing or exporting a report template, you are copying report parameters from one PowerSchool system to another PowerSchool system. For more information on importing and exporting report templates, see the sections "[Alternate Ways to Create Reports](#)" and "[Report Templates](#)."

# Import

## Quick Import

Use the Quick Import function to enter a large amount of data into PowerSchool. Before completing this procedure, you must have an ASCII text file that contains the data to import and is preferably delimited by tabs. For information on importing test scores, see the section "[How to Import Test Scores](#)."

## How to Use Quick Import

1. On the start page, choose Special Functions from the main menu.
2. On the Special Functions page, click Importing & Exporting. The Importing & Exporting page appears.



### Importing & Exporting

Importing	
<a href="#">Quick Import</a>	Import records from an ASCII text file.
<a href="#">Import Using Template</a>	Import using an existing template.
<a href="#">Templates for Importing</a>	Set up import templates.
Exporting	
<a href="#">Quick Export</a>	Export student data.
<a href="#">Export Using Template</a>	Export using an existing template.
<a href="#">Templates for Exporting</a>	Set up export templates.

- Click Quick Import. The Quick Import page appears.

### Quick Import

Option	Value
Table:	Students
Field delimiter:	Tab
End-of-line marker:	CR
File to import:	student.export <input type="button" value="Browse..."/>
Suggest field map	<input checked="" type="checkbox"/>
School	Apple Grove High School

**Note:** If the school is incorrect, click School at the top of the page to choose a new school. Restart this procedure.

- Use the following table to enter information in the fields:

Field	Description
Table	<p>Choose the table to which the data will be imported from the pop-up menu.</p> <p>If you choose Sections, be sure the target term is selected. For more information, see the section "<a href="#">How to Change Terms.</a>"</p> <p>Note: When importing multiple section records, the sections' expressions as defined by your school are required. An expression is the combination of the periods and days in which the section meets. Though PowerSchool creates internal values for periods and days, you are to import the actual values that you want to appear when the system displays expressions. Also, an invalid expression causes an error for that record, which results in the record not being imported.</p>
Field delimiter	<p>Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data. If you choose Other, enter the delimiter in the blank field.</p>
End-of-line marker	<p>Choose the end-of-line marker from the pop-up menu. This refers to the item that will separate the records in the exported data. If you choose Other, enter the delimiter in the blank field.</p> <ul style="list-style-type: none"> <li>• CR: Carriage return</li> <li>• CRLF: Carriage return line feed</li> <li>• LF: Line feed</li> </ul>
File to import	<p>Either enter the file path and name of the file to import or click Browse next to the "File to import" field, navigate to the data file, and click Open.</p>
Suggest field map	<p>Select this checkbox to have the system suggest into which PowerSchool field each piece of data in the data file is saved. These are just suggestions and can be changed before saving.</p>

5. Click Import.

**Note:** When importing test score data, the Select Test page appears instead. For more information, see the section "[How to Import Test Scores.](#)"



On the "Import Records from an ASCII Text File" page, determine into which PowerSchool fields the system will import each field of data from the file.

## Import Maps

An import map is a set of directions that the system follows to find a place for each piece of data in your PowerSchool system. Create an import map to determine into which PowerSchool fields the system will import each field of data from the file. Determine what the system will do with records that contain a student number that already exists in your PowerSchool system.

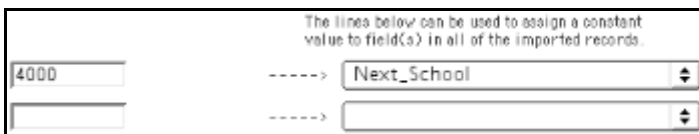
On the left side of the page, the "From your file" column displays the fields of the first record in the import file.

- If you select the "Suggest field map" checkbox on the Quick Import page, the To PowerSchool column displays the PowerSchool fields suggested for each piece of data imported.
- If you do not select the "Suggest field map" checkbox or you need to change the fields, use the pop-up menu to choose the PowerSchool field into which the system imports the data from the import file.

## How to Enter a New Value in a Field for All Records in the Import File

On the "Import Records from an ASCII Text File" page, determine whether you want to enter a new value or update an existing value in a PowerSchool field for all records from the import file. For example, you can enter the same city for all student records in an import file.

1. Choose the PowerSchool field into which you want to enter each value from the To PowerSchool pop-up menu.
2. Enter the imported value for unmapped fields that you want to use, such as the city name, and choose the PowerSchool field from the pop-up menu.



The lines below can be used to assign a constant value to field(s) in all of the imported records.

4000 -----> Next\_School

----->

3. Either click Submit or, if applicable, select any combination of the advanced import options. For more information, see the section "[Advanced Import Options](#)."

The Import Progress page displays the records that were successfully imported and those that the system could not import because of your specifications. The system imports the data into the selected table. Depending on the type of data, you can view, edit, and report on it.

## Templates for Importing

If you often import the same fields of data, you can create a template so that you don't have to define the import parameters and field import map every time you perform an import.

For example, if you often import an update from the school nurse with immunization information, create a template that includes the fields and format for immunization-related fields.

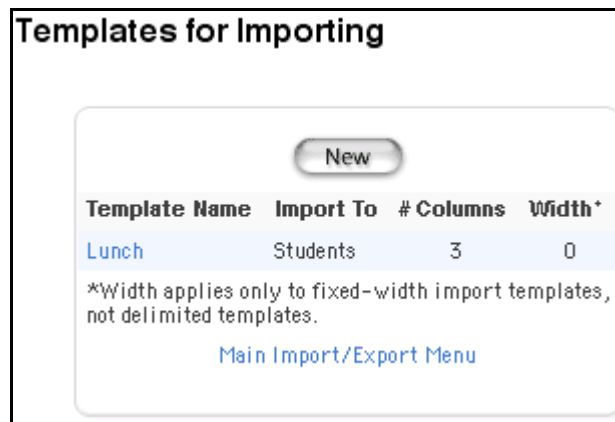
## How to Add an Import Template

Create an import template to use each time you import the same data into your PowerSchool system.

1. On the start page, choose Special Functions from the main menu.
2. Click Importing & Exporting. The Importing & Exporting page appears.



3. Click "Templates for Importing." The "Templates for Importing" page appears.



4. Click New. The New Import Template page appears.

**New Import Template**

Option	Value
Name of this template	<input type="text" value="State Information"/>
Import into this table	<input type="text" value="Students"/>
Delimited or fixed-field length?	<input type="text" value="Delimited"/>
Field delimiter	<input type="text" value="Tab"/> <small>(Ignored for fixed-length files)</small>
End-of-line (record) delimiter	<input type="text" value="CR"/>
Update Mode	<input type="checkbox"/> Update existing records
Columns (fields) Place each field on a new line Format: column width <tab> field name	<div style="border: 1px solid gray; padding: 5px; min-height: 100px;">           State lastfirst         </div>

5. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.
Import into this table	Choose the Students, Courses, or Teachers table from the pop-up menu.
Delimited or fixed-length?	Choose Delimited or "Fixed-field length" for the data format from the pop-up menu.
Field delimiter	<p>If you chose Delimited, use the pop-up menu to choose which delimiter to use to separate the fields in the exported data:</p> <ul style="list-style-type: none"> <li>Tab</li> <li>Comma</li> <li>Other: Enter the type of field delimiter in the adjacent field.</li> </ul>
End-of-line (record) delimiter	<p>Use the pop-up menu to choose one of the following to determine how the records are separated in the files you import using this template:</p> <ul style="list-style-type: none"> <li>CR: Carriage return</li> <li>CRLF: Carriage return/line feed</li> <li>LF: Line feed</li> <li>Other: Enter the type of end-of-line delimiter in the adjacent field, such as a semicolon.</li> </ul>

Field	Description
Update Mode	Select this checkbox if you want the data in the file you import to update any fields with existing data. Otherwise, deselect this checkbox.
Columns	<p>Create a map to determine into which PowerSchool fields each field of information in the import file is saved. Enter the fields in the order they appear in the import file.</p> <p>If you chose "Fixed-field length," indicate the width of each column (in characters) and the field name. To separate the number and field name, enter &lt;tab&gt;. For example, if the first column in your fixed width file contains the student's phone number, enter 12&lt;tab&gt;home_phone.</p> <p>If you chose Delimited, enter each field name and press Return (Mac) or Enter (Windows).</p>

- Click Submit. The "Templates for Importing" page displays the new template.

### Templates for Importing

Template Name	Import To	# Columns	Width*
<a href="#">Lunch</a>	Students	3	0
<a href="#">State Information</a>	Students	2	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

## How to Edit an Import Template

Edit an import template to use each time you import the same data into your PowerSchool system.

- On the start page, choose Special Functions from the main menu.
- Click Importing & Exporting. The Importing & Exporting page appears.

### Importing & Exporting

**Importing**

<a href="#">Quick Import</a>	Import records from an ASCII text file.
<a href="#">Import Using Template</a>	Import using an existing template.
<a href="#">Templates for Importing</a>	Set up import templates.

**Exporting**

<a href="#">Quick Export</a>	Export student data.
<a href="#">Export Using Template</a>	Export using an existing template.
<a href="#">Templates for Exporting</a>	Set up export templates.

- Click "Templates for Importing." The "Templates for Importing" page appears.

### Templates for Importing

Template Name	Import To	# Columns	Width*
<a href="#">Lunch</a>	Students	3	0
<a href="#">State Information</a>	Students	2	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click the name of the template to be edited in the Template Name column. The Edit Import Template page appears.

### Edit Import Template

Option	Value
Name of this template	<input type="text" value="State Information"/>
Import into this table	Students
Delimited or fixed-field length?	Delimited
Field delimiter	Tab <input type="checkbox"/> (ignored for fixed-length files)
End-of-line (record) delimiter	CR
Update Mode	<input type="checkbox"/> Update existing records
Columns (fields) Place each field on a new line Format: column width <tab> field name	<div style="border: 1px solid gray; padding: 5px; min-height: 100px;">           lastfirst State         </div>

[Export this template](#)

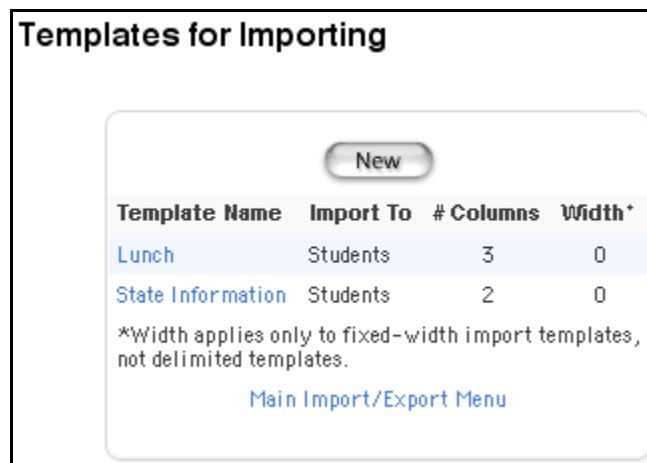
5. Use the following table to edit information in the fields:

Field	Description
Name of this template	Edit a name for the template.
Import into this table	Choose the Students, Courses, or Teachers table from the pop-up menu.
Delimited or fixed-field length?	Choose Delimited or "Fixed-field length" for the data format from the pop-up menu.
Field delimiter	If you chose Delimited, use the pop-up menu to choose which delimiter to use to separate the fields in the exported data: <ul style="list-style-type: none"> <li>• Tab</li> <li>• Comma</li> <li>• Other: Enter the type of field delimiter in the adjacent field.</li> </ul>
End-of-line (record) delimiter	Use the pop-up menu to choose one of the following to determine how the records are separated in the files you import using this template: <ul style="list-style-type: none"> <li>• CR: Carriage return</li> <li>• CRLF: Carriage return/line feed</li> <li>• LF: Line feed</li> <li>• Other: Enter the type of end-of-line delimiter in the</li> </ul>



Field	Description
	adjacent field, such as a semicolon.
Update Mode	Select this checkbox if you want the data in the file you import to update any fields with existing data. Otherwise, deselect this checkbox.
Columns	<p>Edit a map to determine into which PowerSchool fields each field of information in the import file is saved. Enter the fields in the order they appear in the import file.</p> <p>If you chose "Fixed-field length," indicate the width of each column (in characters) and the field name. To separate the number and field name, enter &lt;tab&gt;. For example, if the first column in your fixed width file contains the student's phone number, enter 12&lt;tab&gt;home_phone.</p> <p>If you chose Delimited, enter each field name and press Return (Mac) or Enter (Windows).</p>

- Click Submit. The "Templates for Importing" page displays the edited template.



## How to Delete an Import Template

Delete import templates when they are no longer needed to conserve space on your system and minimize the possibility of confusion with the templates that are still used.

- On the start page, choose Special Functions from the main menu.
- Click Importing & Exporting. The Importing & Exporting page appears.

### Importing & Exporting

**Importing**

[Quick Import](#)      Import records from an ASCII text file.

[Import Using Template](#)      Import using an existing template.

[Templates for Importing](#)      Set up import templates.

**Exporting**

[Quick Export](#)      Export student data.

[Export Using Template](#)      Export using an existing template.

[Templates for Exporting](#)      Set up export templates.

3. Click "Templates for Importing." The "Templates for Importing" page appears.

### Templates for Importing

Template Name	Import To	# Columns	Width*
<a href="#">Lunch</a>	Students	3	0
<a href="#">State Information</a>	Students	2	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

4. Click the name of the template to be deleted in the Template Name column. The Edit Import Template page appears.

### Edit Import Template

Option	Value
Name of this template	State Information
Import into this table	Students
Delimited or fixed field length?	Delimited
Field delimiter	Tab (ignored for fixed-length files)
End-of-line (record) delimiter	CR
Update Mode	<input type="checkbox"/> Update existing records
Columns (fields) Place each field on a new line Format: column width <tab> field name	lastfirst State

[Export this template](#)

- Click Delete. The "Templates for Importing" page displays without the deleted template.

### Templates for Importing

Template Name	Import To	# Columns	Width*
Lunch	Students	3	0

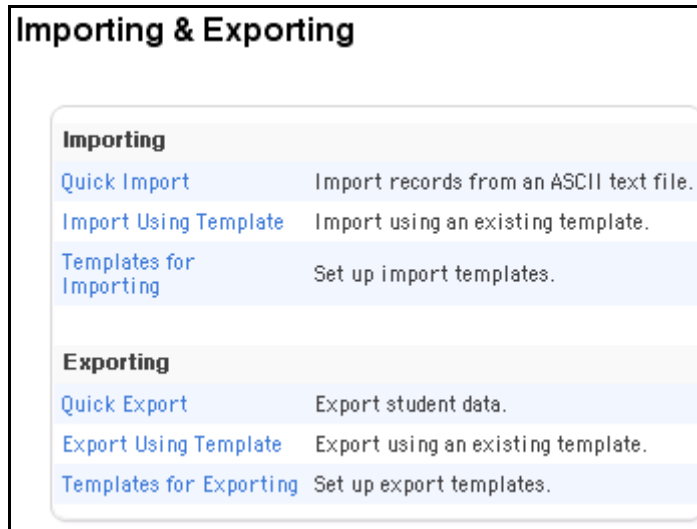
\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

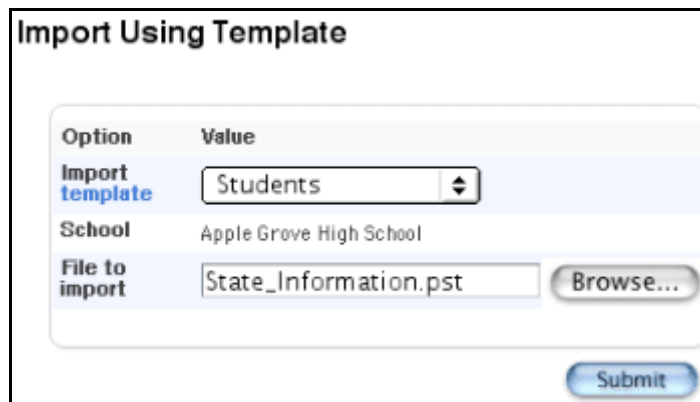
## How to Import Using a Template

When importing data using a template, you match the data with the fields defined in the template. To complete this procedure, you need a data file saved to a local or network location and an import template. For more information on creating an import template, see the section "[How to Add an Import Template.](#)"

- On the start page, choose Special Functions from the main menu.
- Click Importing & Exporting. The Importing & Exporting page appears.



- Click Import Using Template. The Import Using Template page appears.

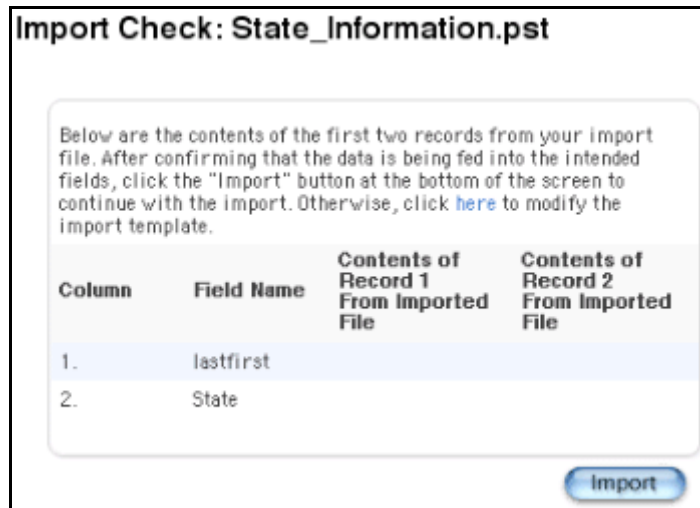


Option	Value
Import template	Students
School	Apple Grove High School
File to import	State_Information.pst <input type="button" value="Browse..."/>

- Use the following table to enter information in the fields:

Field	Description
Import template	Choose the template to use from the pop-up menu. <b>Note:</b> Click template to link to the "Templates for Importing" page, where you can view, create, edit, and remove templates used for importing.
File to import	Either enter the data file path and name in the field, or click Browse... to select the data file.

- Click Submit. The Import Check: [data file name] page appears.

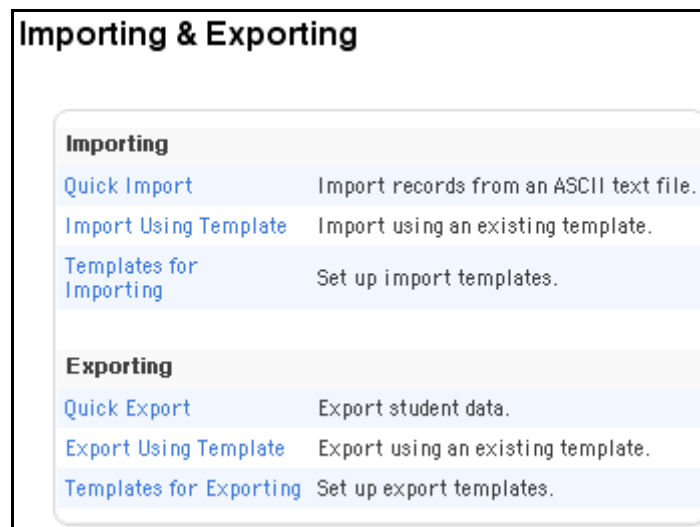


6. Verify that the data correlates to the fields from the template. If it doesn't, click the link to modify the template. For more information, see the section "[How to Edit an Import Template](#)." Otherwise, click Import. The Importing: [data file name] page appears, and the data is imported.

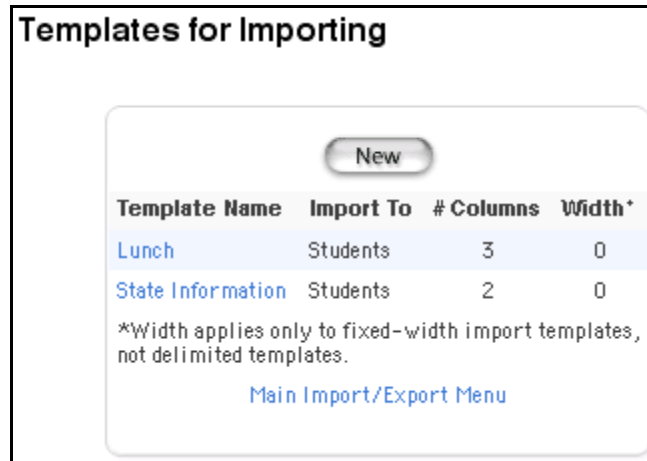
## How to Export a Template

Export a template used for importing data to save a backup copy of the template. Though you can view and modify the exported template using an application such as a web browser, the exported template can also be sent to a system outside of your PowerSchool system.

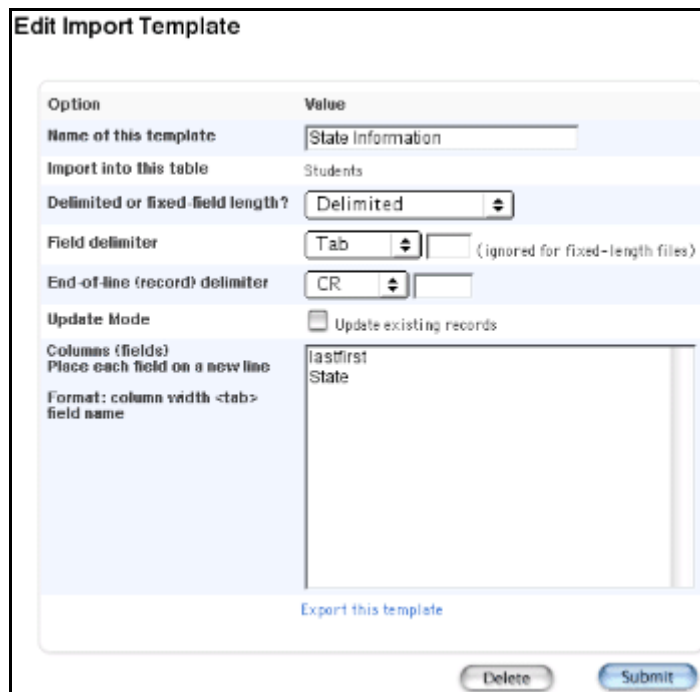
1. On the start page, choose Special Functions from the main menu.
2. Click Importing & Exporting. The Importing & Exporting page appears.



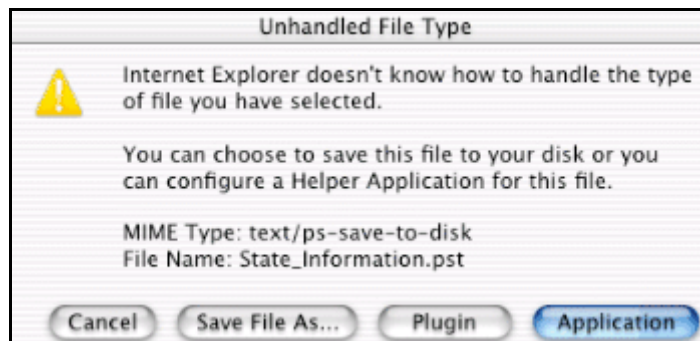
3. Click "Templates for Importing." The "Templates for Importing" page appears.



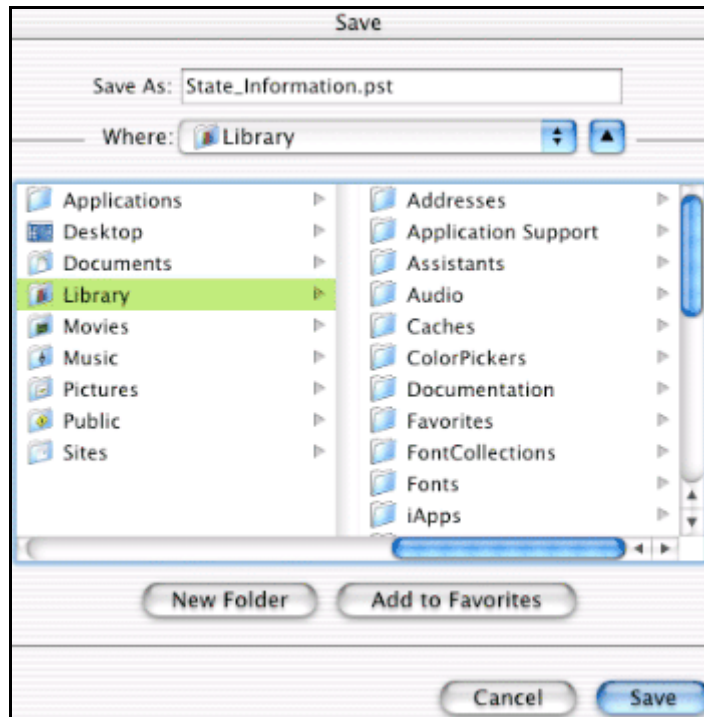
- Click the name of the template to be exported in the Template Name column. The Edit Import Template page appears.



- Click "Export this template." The File Download dialog appears.



6. Select Save File As... or "Save this file to disk." The Save or Save As dialog appears.



7. Select a file location.
8. Click Save. The template saves to the selected location.

## Advanced Import Options

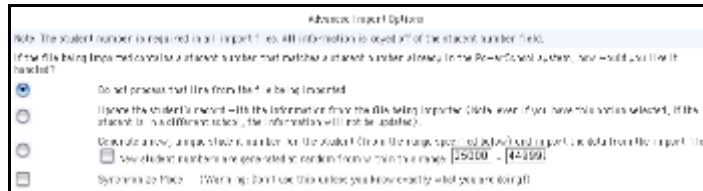
Depending on the selections made on the Quick Import page, you can opt to use the advance import options at the bottom of the "Import Records from an ASCII Text File" page.

### Student Table

For the Students table, select one of the following options to determine what you want the system to do when a student record in the import file contains a student ID number that already exists in PowerSchool:

- If you do not want the system to import any record with a student number that already exists, select "Do not process that line from the file being imported."
- If you want the system to update the matching student's record with the data in the import file, select "Update the student's record with the information from the file being imported."
- If you want the system to create a new record if a student ID number is in the import file, select "Generate a new, unique student number for the student (from the range specified below)." Then, select the checkbox below this option, and enter the number range within which you want the system to generate and assign the new student ID numbers.

- If your school uses AutoComm to synchronize your data in PowerSchool with data in another system, select the Synchronize Mode checkbox to perform an AutoComm import. Contact your PowerSchool administrator before using this option.



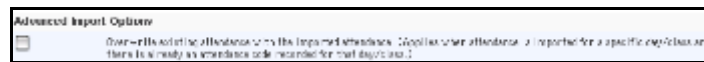
**Advanced Import Options**

Note: The student number is required in all import files. All information is based off of the student number field. If the file being imported contains a student number that matches a student's number already in the PowerSchool system, how would you like it handled?

- Do not process that line from the file being imported.
- Update the student's record with the information from the file being imported. (Only work if you have this series selected, if the student has a different series, the information will not be update.)
- Generate a new, unique student number for the student. (In the range specified below) and import the data from the import file.
  - New student numbers are generated by random from within the range: [252100] - [422199]
- Synchronize Mode: (Work in progress) Use this unless you know exactly what you are doing!

## Attendance Table

For the Attendance table, select the "Overwrite existing attendance with the imported attendance" checkbox if you want the system to use the imported attendance data in cases where attendance codes already exist for that day or class.

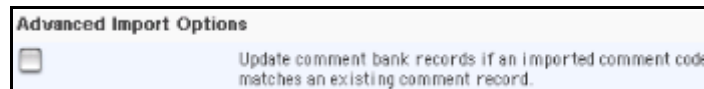


**Advanced Import Options**

Overwrite existing attendance with the imported attendance. (Only work when attendance is reported for a specific day/class and there is already an attendance code recorded for that day/class.)

## Comment Bank Table

For the Comment Bank table, select the "Update comment bank records" checkbox if you want the system to use the imported comment bank comments in cases where there are already comment bank comments with the same code.



**Advanced Import Options**

Update comment bank records if an imported comment code matches an existing comment record.

## Courses Table

For the Courses table, select the "Update course records" checkbox if you want the system to add course-related information to existing course records in cases where the course numbers are the same.



**Advanced Import Options**

Update course records if an imported course number matches an existing course record.

## Historical Grades Table

For the "Historical grades" table:

- If you want the system to include more than one score for a student only when the term and storecode are the same, select the "Allow multiple grades for a student to be stored" checkbox.
- If the school year indicated on the import file refers to the beginning of the school year, select 97-98 from the pop-up menu. If the school year indicated on the import file refers to the end of the school year, select 96-97 from the pop-up menu.



- If the courses in the import file have unrecognized names and you want to specify the course number range for the imported courses, select the "If a course name is imported that is not recognized" checkbox and enter the range for the new course numbers in the range fields. If you do not select this checkbox, the system will assign a random course number in the 9000 range.
- If you want to store grades that include neither a letter grade nor any earned credit, select the "Allow grades to be stored which contain both" checkbox.

Advanced Import Options	
<input type="checkbox"/>	Allow multiple grades for a student to be stored when identical terms and course code are detected. Different import files may specify school years differently. For example, in one file, 1997 may refer to the 96-97 school year while in another 1997 refers to the 97-98 school year. In this file being imported, when a grade is imported and the year (as an example) specified is 1997, it should be interpreted as meaning the <u>96-97</u> school year.
<input type="checkbox"/>	If a course name to import that is not recognized, create a new, unique course number for it. Draw this course number from this range: <u>90000</u> - <u>100000</u>
<input type="checkbox"/>	Allow grades to be stored which contain both (a) a letter grade and (b) an earned credit. (Such grades will not be stored unless you select this option.)

## Meal Transactions Table

For the "Meal transactions" table, select the "Use PowerSchool's internal student id numbers" checkbox if you want the system to reference the ID field versus the student\_number field.

Advanced Import Options	
<input type="checkbox"/>	Update section records if an imported record matches an existing section. ("matching" means same course and section numbers in the current school year.)
<input type="checkbox"/>	Synchronize Mode (Warning: This will delete all sections for this school for the current school year that are not found in the file being imported.)

## Sections Table

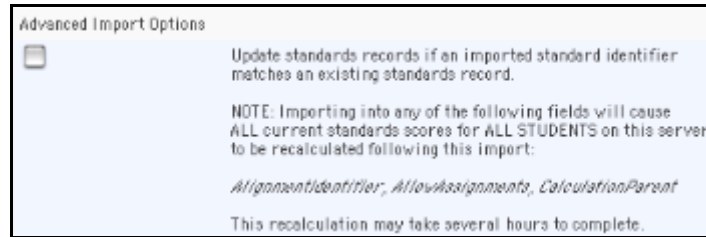
For the Sections (master schedule) table:

- Select the "Update section records" checkbox if you want the system to add section-related information to existing section records in cases where the course and section numbers are the same.
- If your school uses AutoComm to synchronize your data in PowerSchool with data in another system, select the Synchronize Mode checkbox to perform an AutoComm import. Contact your PowerSchool administrator before using this option.

Advanced Import Options	
<input type="checkbox"/>	Update section records if an imported record matches an existing section. ("matching" means same course and section numbers in the current school year.)
<input type="checkbox"/>	Synchronize Mode (Warning: This will delete all sections for this school for the current school year that are not found in the file being imported.)

## Standards Table

For the Standards table, select the "Update standards records" checkbox if you want the system to add standards-related information to existing standards records in cases where the standard identifiers are the same.



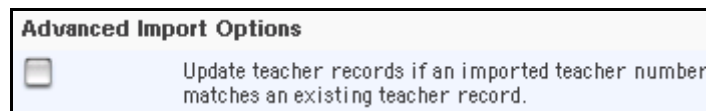
### Student Schedules Table

For the "Student schedules" table, if your school uses AutoComm to synchronize your data in PowerSchool with data in another system, select the Synchronize Mode checkbox to perform an AutoComm import. Contact your PowerSchool administrator before using this option.



### Teachers Table

For the Teachers table, select the "Update teacher records" checkbox if you want the system to add teacher-related information to existing teacher records in cases where the teacher numbers are the same.



### Test Scores Table

For more information about importing test scores, see the section "[How to Import Test Scores.](#)"

## AutoComm Setup

Use AutoComm to synchronize the data in your system with that in another system, such as a mainframe system. To synchronize your data, set up intervals at which PowerSchool automatically imports files of data from the other system.

To use AutoComm, create an AutoComm record where you determine the synchronization parameters for each of the following files:

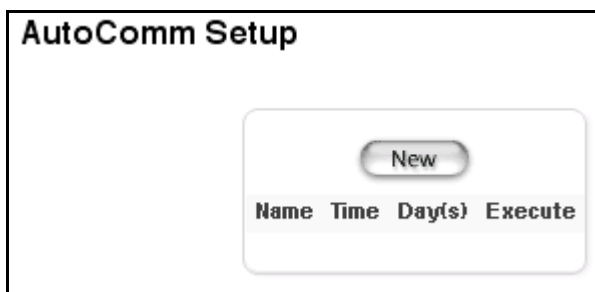
- Courses
- Teachers
- Sections
- Students
- Student schedules

Note: When importing multiple section records, the sections' expressions as defined by your school are required. An expression is the combination of the periods and days in which the section meets. Though PowerSchool creates internal values for periods and days, you are to import the actual values that you want to appear when the system displays expressions. Also, an invalid expression causes an error for that record, which results in the record not being imported.

## How to Add an AutoComm Record

PowerSchool uses the parameters that you define for the record on this page to import the appropriate data at the dates and times you specify.

1. On the start page, choose System from the main menu.
2. Click AutoComm Setup. The AutoComm Setup page appears.



3. Click New. The AutoComm Record page appears.

**AutoComm Record**

Field	Value
Name	<input type="text" value="Phone number"/>
Table to Import	<input type="text" value="Attendance"/>
When to Execute	<input type="text" value="2 AM"/> <input type="text" value=":00"/>
Days to Execute	<input type="text" value="(MTWHFSU)"/>
Turn Execution Off	<input type="checkbox"/>
<input type="checkbox"/> Use FTP <input type="checkbox"/> Use Passive Mode	FTP host name: <input type="text"/> FTP account name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (optional): <input type="text"/> Default is 10 seconds
Path	<input type="text"/>
Field Delimiter	<input type="text" value="Tab"/>
Record Delimiter	<input type="text" value="CRLF"/>
Sort Order	<input type="text"/>
Synchronize Mode (Important: Select this checkbox when PowerSchool data is updated from another source, such as a mainframe.)	<input type="checkbox"/>
Update existing records with imported data (when applicable)	<input type="checkbox"/>
Mark students and their schedules inactive when their exitdate is <= today.	<input type="checkbox"/>
First record of file is "number_of_records=" **	<input type="checkbox"/> (Recommended)
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
PowerSchool fields to import into:	<input type="text"/> <a href="#">Student field list</a>
<input type="checkbox"/> Duplicate this AutoComm record to all schools on this server (use only when creating a new AutoComm record)	

\*\* The file will not be imported if the number of records in the file do not match the number given in the first record of the file.

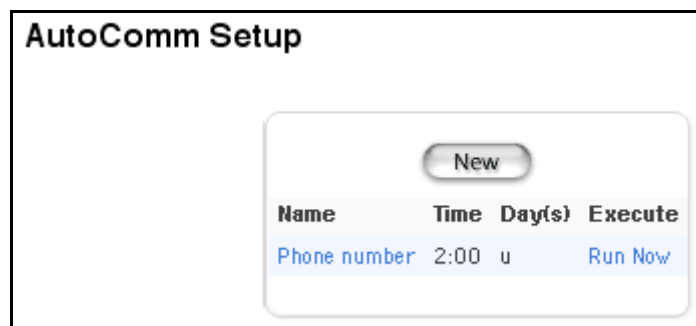
4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of this record.
Table to Import	Use the pop-up menu to choose the table into which you are importing data with this record: <ul style="list-style-type: none"> <li>Attendance</li> <li>Students</li> <li>Courses</li> <li>Sections</li> <li>Student schedules</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>Teachers</li> </ul>
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically import data.
Days to Execute	Enter the days of the week you want the system to import records. Starting with Monday, use the following abbreviations for the days of the week: <b>MTWTFSU</b> .
Turn Execution Off	Do one of the following: <ul style="list-style-type: none"> <li>Select this checkbox to stop the system from automatically importing data.</li> <li>Deselect this checkbox to turn AutoComm on.</li> </ul>
Use FTP	If you want to use the file transfer protocol (FTP) to import the records from the other system, enter information in the following fields: <ul style="list-style-type: none"> <li>FTP host name</li> <li>FTP account name</li> <li>FTP password</li> <li>Timeout in seconds (optional): Default is 10 seconds.</li> </ul>
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select this checkbox.
Path	Enter the path to the folder of the file on your computer or network.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the import file: <ul style="list-style-type: none"> <li>Tab</li> <li>Comma</li> </ul>
Record Delimiter	Use the pop-up menu to choose how records are separated in the import file: <ul style="list-style-type: none"> <li>CRLF: Carriage return, line feed</li> <li>CR: Carriage return</li> <li>LF: Line feed</li> </ul>
Sort Order	Enter the order that this record appears on the AutoComm Setup page.
Update existing records with imported data (when applicable)	Do one of the following: <ul style="list-style-type: none"> <li>Select this checkbox if you want the system to update</li> </ul>

Field	Description
(when applicable)	<p>existing student records with data from each import. The system updates blank fields within records and creates new records for those that do not exist.</p> <ul style="list-style-type: none"> <li>Deselect this checkbox if you do not want the system to update any record that contains data.</li> </ul>
Mark students and their schedules inactive when their exit date is <= today.	If you want the system to automatically import a student record as inactive if the student's exit date is earlier than today, select this checkbox. Otherwise, deselect this checkbox.
First record of file is number_of_records=	The system does not import the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select this checkbox.
E-Mail completion report to	Enter the email addresses of the people you want the system to send a completion report to each time it imports this file. Separate multiple addresses with commas.
PowerSchool fields to import into	Enter the PowerSchool fields in which the system saves each value in the import file. After you enter each field code, press Return (Mac) or Enter (Windows).
Duplicate this AutoComm record to all schools on this server	If you are creating this record for the first time, you can select this checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect this checkbox.

- Click Submit. The AutoComm Setup page displays the new record.



## How to Edit an AutoComm Record

- On the start page, choose System from the main menu.
- Click AutoComm Setup. The AutoComm Setup page appears.

### AutoComm Setup

Name	Time	Day(s)	Execute
Phone number	2:00	u	Run Now

- Click the name of the AutoComm record to be edited in the Name column. The AutoComm Record page appears.

### AutoComm Record

<b>Field</b>	<b>Value</b>
Name	<input type="text" value="Phone number"/>
Table to Import	<input type="text" value="Students"/>
When to Execute	<input type="text" value="2 AM"/> <input type="text" value=":00"/>
Days to Execute	<input type="text" value="MTWHF"/> (MTWHFSU)
Turn Execution Off	<input type="checkbox"/>
<input type="checkbox"/> Use FTP <input checked="" type="checkbox"/> Use Passive Mode	FTP host name: <input type="text"/> FTP account name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (optional): <input type="text" value="0"/> Default is 10 seconds
Path	<input type="text"/>
Field Delimiter	<input type="text" value="Tab"/>
Record Delimiter	<input type="text" value="CRLF"/>
Sort Order	<input type="text" value="0"/>
Synchronize Mode (Important: Select this checkbox when PowerSchool data is updated from another source, such as a mainframe.)	<input checked="" type="checkbox"/>
Update existing records with imported data (when applicable)	<input type="checkbox"/>
Mark students and their schedules inactive when their exitdate is <= today.	<input type="checkbox"/>
First record of file is "number_of_records=" **	<input type="checkbox"/> (Recommended)
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
PowerSchool fields to import into:	<input type="text" value="Home_Phone"/>
<input type="checkbox"/> Duplicate this AutoComm record to all schools on this server (use only when creating a new AutoComm record)	
** The file will not be imported if the number of records in the file do not match the number given in the first record of the file.	
<input type="button" value="Delete"/> <input type="button" value="Submit"/>	

- Use the following table to edit information in the fields:

Field	Description
Name	Edit the name of this record.
Table to Import	Use the pop-up menu to choose the table into which you are importing data with this record: <ul style="list-style-type: none"> <li>• Attendance</li> <li>• Students</li> <li>• Courses</li> <li>• Sections</li> <li>• Student schedules</li> <li>• Teachers</li> </ul>
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically import data.
Days to Execute	Edit the days of the week you want the system to import records. Starting with Monday, use the following abbreviations for the days of the week: <b>MTWTFSU</b> .
Turn Execution Off	Select this checkbox to stop the system from automatically importing data. To turn AutoComm on, deselect this checkbox.
Use FTP	If you want to use the file transfer protocol (FTP) to import the records from the other system, edit information in the following fields: <ul style="list-style-type: none"> <li>• FTP host name</li> <li>• FTP account name</li> <li>• FTP password</li> <li>• Timeout in seconds (optional). Default is 10 seconds.</li> </ul>
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select this checkbox.
Path	Edit the path to the folder of the file on your computer or network.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the import file: <ul style="list-style-type: none"> <li>• Tab</li> <li>• Comma</li> </ul>



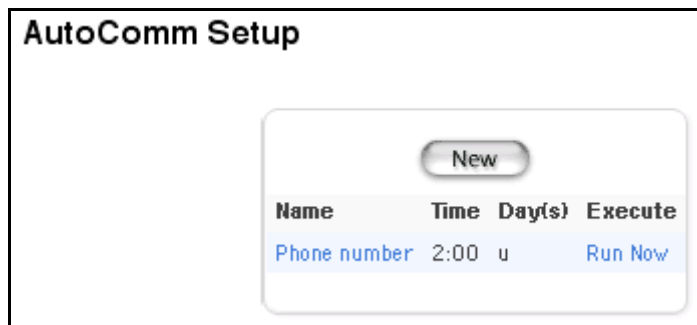
Field	Description
Record Delimiter	Use the pop-up menu to choose how records are separated in the import file: <ul style="list-style-type: none"> <li>• CRLF: Carriage return, line feed</li> <li>• CR: Carriage return</li> <li>• LF: Line feed</li> </ul>
Sort Order	Edit the order that this record appears on the AutoComm Setup page.
Update existing records with imported data (when applicable)	Do one of the following: <ul style="list-style-type: none"> <li>• Select this checkbox if you want the system to update existing student records with data from each import. The system updates blank fields within records and creates new records for those that do not exist.</li> <li>• Deselect this checkbox if you do not want the system to update any record that contains data.</li> </ul>
Mark students and their schedules inactive when their exit date is <= today.	If you want the system to automatically import a student record as inactive if the student's exit date is earlier than today, select this checkbox. Otherwise, leave this field blank.
First record of file is number_of_records=	The system does not import the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select this checkbox.
E-Mail completion report to	Edit the email addresses of the people you want the system to send a completion report to each time it imports this file. Separate multiple addresses with commas.
PowerSchool fields to import into	Edit the PowerSchool fields in which the system saves each value in the import file. After you enter each field code, press Return (Mac) or Enter (Windows).
Duplicate this AutoComm record to all schools on this server	If you are creating this record for the first time, you can select this checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect this checkbox.

5. Click Submit. The AutoComm Setup page displays the edited record.



### How to Delete an AutoComm Record

1. On the start page, choose System from the main menu.
2. Click AutoComm Setup. The AutoComm Setup page appears.



3. Click the name of the AutoComm record to be deleted in the Name column. The AutoComm Record page appears.

Field	Value
Name	Phone number
Table to Import	Students
When to Execute	2 AM :00
Days to Execute	MTWHF (MTWHFSU)
Turn Execution Off	<input type="checkbox"/>
<input type="checkbox"/> Use FTP <input checked="" type="checkbox"/> Use Passive Mode	FTP host name: <input type="text"/> FTP account name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (optional): <input type="text"/> Default is 10 seconds
Path	<input type="text"/>
Field Delimiter	Tab
Record Delimiter	CRLF
Sort Order	0
Synchronize Mode (Important: Select this checkbox when PowerSchool data is updated from another source, such as a mainframe.)	<input checked="" type="checkbox"/>
Update existing records with imported data (when applicable)	<input type="checkbox"/>
Mark students and their schedules inactive when their exitdate is <= today.	<input type="checkbox"/>
First record of file is "number_of_records=" **	<input type="checkbox"/> (Recommended)
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
PowerSchool fields to import into: <a href="#">Student field list</a>	Home_Phone
<input type="checkbox"/> Duplicate this AutoComm record to all schools on this server (use only when creating a new AutoComm record)	

\*\* The file will not be imported if the number of records in the file do not match the number given in the first record of the file.

4. Click Delete. The Selection Deleted page appears.

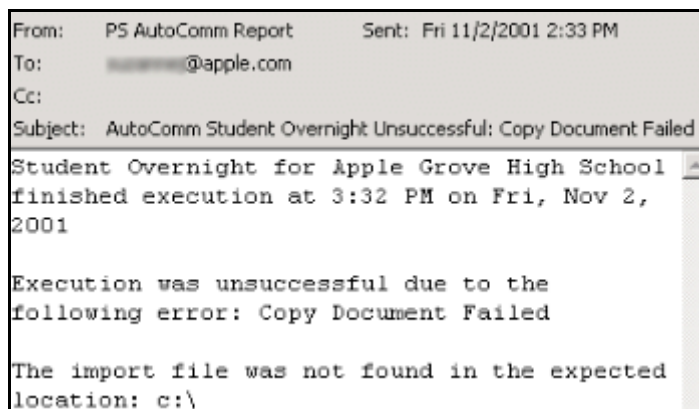
## How to Run an AutoComm Record

Manually run an AutoComm record to avoid waiting for the process to automatically run on the specified day and time.

1. On the start page, choose System from the main menu.
2. Click AutoComm Setup. The AutoComm Setup page appears.



- Click Run Now. The AutoComm record runs, and the AutoComm Setup page appears. If an email address is specified in the "E-Mail completion report to" field, the system emails the recipient the status of the AutoComm process.



## Export

### Quick Export

This method quickly produces a simple list of students and information from the Student table. Change the parameters to produce a more detailed list. For more information on exporting, see the section "[How to Export Using a Template](#)."

#### How to Use Quick Export

- On the start page, select the group of students.
 

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.
- Click Quick Export. In most cases, you will not need to change the default options on the Export Students page. Skip to step 4. If you want to change the selections, proceed to the next step.

### Quick Export

Export the 58 selected students  
 LastFirst  
 Next\_school

Field Delimiter Tab

Record Delimiter CR

"Surround Fields"
  Column titles on 1st row

FIELDS

3. Use the following table to enter information in the fields:

Field	Description
Export the [#] selected students	Enter the fields to be included on the exported spreadsheet. Enter as many fields as you want. Separate multiple fields with spaces. If you need help remembering field names, click Fields at the bottom of the page.
Field Delimiter	Choose a field delimiter from the pop-up menu. The field delimiter is the item that separates fields in the exported data. If you choose Other, enter the delimiter in the blank field.
Record Delimiter	Choose the record delimiter from the pop-up menu. This refers to the item that will separate the records in the exported data. If you choose Other, enter the delimiter in the field. <ul style="list-style-type: none"> <li>• CR: Carriage return</li> <li>• CRLF: Carriage return line feed</li> <li>• LF: Line feed</li> </ul>
Surround Fields	Select this checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select this checkbox to include column titles on the first row of the exported data.

4. Click Submit. The exported data appears.

```
Lastfirst Next School
Bevan, Adam C 4000
Bliss, Justin 4000
Briggs, Jessica K 4000
Briggs, John K 4000
Briggs, Ryan Y 4000
Budd, Dominique R 4000
Conder, Amberlee A 4000
Cornia, Lacey 4000
Denk, John R. 4000
Duff, Cormac T 4000
Dunn, Andrea 4000
Egbert, Justin 4000
Erickson, Jan L 4000
Fitzgerald, Angela 4000
Fortie, Kira Y 4000
Fredrickson, Channing 4000
Freeman, Amanda 4000
Fritz, Justin L 4000
Garner, Joshua L 4000
Gordon, Carrie K 4000
Greeff, Ashly 4000
Gust, Keith L 4000
Halbert, Chelsea R 4000
```

5. Choose File > Save As... to save the file. Open the saved file using a spreadsheet application, such as Excel or Lotus 1-2-3. Format, print, and save it as any other spreadsheet document.

## Templates for Exporting

Export information by using a template. Select the template from a list or create a new one. For more information on exporting, see the section "[Quick Export](#)."

### How to Create an Export Template

If there is no template that you can use to perform the export or no template you can edit to meet your needs, you must create a new one.

1. On the start page, select the group of students.  
**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.
2. Click Export Using Template. The Export Using Template page appears.

### Export Using Template

Option	Value
Type of Export:	<input style="width: 100%;" type="text" value="Students"/>

- Click Template. The "Templates for Exporting" page appears.

### Templates for Exporting

Template Name	Export From	# Columns	Width*
<a href="#">Attendance Points</a>	Students	9	0
<a href="#">Attendance Totals for Semester</a>	Students	6	0
<a href="#">HS Registration Master</a>	Students	9	0
<a href="#">MS Registration Master</a>	Students	7	0
<a href="#">Name &amp; Address</a>	Students	4	0
<a href="#">Name and number</a>	Students	0	0
<a href="#">new kindergarten</a>	Students	3	0
<a href="#">WYCAS Export</a>	Students	13	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	1	0
<a href="#">Teacher Lunch Balances</a>	Staff	3	0
<a href="#">Historical Grades</a>	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click New. The New Export Template page appears.

**New Export Template**

Option	Value
Name of this template	<input type="text" value="Name and number"/>
Export from this table	<input type="text" value="Students"/>
Delimited or fixed-field length?	<input type="text" value="Delimited"/>
Field delimiter (ignored for fixed-field length)	<input type="text" value="Tab"/> <input type="checkbox"/> Surround field values with quotes (" ")
End-of-line (record) delimiter	<input type="text" value="CR"/>
Column Titles	<input checked="" type="checkbox"/> Put column titles on first row
Mime Type (leave blank for default)	<input type="text"/>

5. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.
Export from this table	Choose the table that will be used in the export from the pop-up menu.
Delimited or fixed-field length?	Choose either Delimited or Fixed from the pop-up menu.
Field delimiter	<p>If you chose Delimited in the previous field, use the pop-up menu to choose the field delimiter. This refers to the item that will separate the fields in the exported data. If you choose Other, enter the delimiter in the blank field.</p> <p>Select the checkbox if you want to surround field values with quotation marks.</p>
End-of-line (record) delimiter	Choose the delimiter for the end of each record from the pop-up menu. For Other, enter the delimiter in the blank field.
Column Titles	Select this checkbox to put column titles on the first row.
Mime Type	Enter a MIME type if instructed to do so by PowerSchool Technical Support. Do not perform any procedures related to MIME types without their guidance.

6. Click Submit. The "Templates for Exporting" page displays the new template.



**Templates for Exporting**

[New](#)

Template Name	Export From	# Columns	Width*
Attendance Points	Students	9	0
Attendance Totals for Semester	Students	6	0
HS Registration Master	Students	9	0
MS Registration Master	Students	7	0
Name & Address	Students	4	0
Name and number	Students	0	0
new kindergarten	Students	3	0
WYCAS Export	Students	13	0
Example	Staff	0	0
Example	Staff	0	0
Example	Staff	1	0
Teacher Lunch Balances	Staff	3	0
Historical Grades	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

Add columns to the template using the procedure "How to Add Template Columns."

## How to Add Template Columns

1. On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Export Using Template. The Export Using Template page appears.

**Export Using Template**

Option	Value
Type of Export:	Students

[Submit](#)

- Click Template. The "Templates for Exporting" page appears.

### Templates for Exporting

Template Name	Export From	# Columns	Width*
Attendance Points	Students	9	0
Attendance Totals for Semester	Students	6	0
HS Registration Master	Students	9	0
MS Registration Master	Students	7	0
Name & Address	Students	4	0
Name and number	Students	0	0
new kindergarten	Students	3	0
WYCAS Export	Students	13	0
Example	Staff	0	0
Example	Staff	0	0
Example	Staff	1	0
Teacher Lunch Balances	Staff	3	0
Historical Grades	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click the # Columns link of the template to be changed. The Edit Columns page appears.

### Edit Columns - Name and number

Column	Title	Width*	Cumulative Row Width
There are no columns set up for this export template. *Width applies only to fixed-width import templates, not delimited templates.			

[Back to Templates for Exporting](#)

- Click New to add a column to the template. The New Column page appears.

### New Column - Name and number

Option	Value
<b>Title/Heading</b>	<input type="text" value="Name"/>
<b>Data To Export (Fields)</b>	<input type="text" value="Last_first"/>
<b>If Blank, Export This</b>	<input type="text" value="[No name associated]"/> (optional)
<b>Column Number</b>	<input type="text" value="1"/> (zero to place at end)
<b>Width In Characters</b>	<input type="text"/> (used only for fixed field lengths)
<b>Alignment</b>	<input type="text" value="Left"/> (used only for fixed field lengths)

6. Use the following table to enter information in the fields:

Field	Description
Title/Heading	Enter a title for the column.
Data to Export	Enter the fields of data to be exported. To display the field list, click Fields.
If Blank, Export This	If a record has no data for a particular field, indicate a value to replace the blank field (optional). For example, enter No Data.
Column Number	Enter a column number for this column on the template. All column numbers will have a zero added as a suffix to the column number.
Width in Characters	Enter the width of the column in characters if using fixed-field lengths instead of field delimiters.
Alignment	Use the pop-up menu to choose the alignment of the column if using fixed-field lengths instead of field delimiters.

7. Click Submit. The Edit Columns page appears.
8. Repeat the previous three steps to add additional columns to the template.
9. Click "Back to Templates for Exporting." The "Templates for Exporting" page appears.

The template has been changed. Perform the export by following the instructions in the section "[Export Using a Template.](#)"

## How to Edit a Template

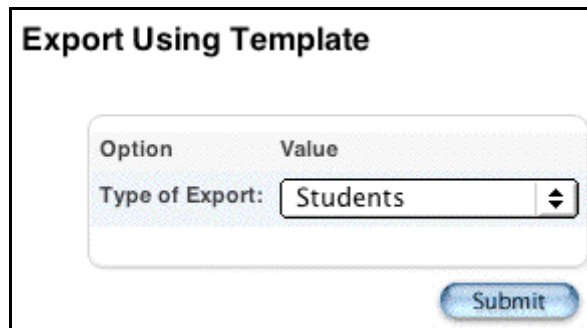
What happens if you need a list that slightly differs from the list that the template produces? You can easily modify the template to meet your needs.

**Note:** Everyone who uses the template will view the changes you enter. Contact other users before changing a template that many people use.

1. On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Export Using Template. The Export Using Template page appears.



Option	Value
Type of Export:	Students

Submit

3. Click Template. The "Templates for Exporting" page appears.

### Templates for Exporting

[New](#)

Template Name	Export From	# Columns	Width*
<a href="#">Attendance Points</a>	Students	9	0
<a href="#">Attendance Totals for Semester</a>	Students	6	0
<a href="#">HS Registration Master</a>	Students	9	0
<a href="#">MS Registration Master</a>	Students	7	0
<a href="#">Name &amp; Address</a>	Students	4	0
<a href="#">Name and number</a>	Students	0	0
<a href="#">new kindergarten</a>	Students	3	0
<a href="#">WYCAS Export</a>	Students	13	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	1	0
<a href="#">Teacher Lunch Balances</a>	Staff	3	0
<a href="#">Historical Grades</a>	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click the template name to be edited. The Edit Export Template page appears.

### Edit Export Template

Label	Value
Name of this template	<input type="text" value="Name and number"/>
Export from this table	Students
Delimited or fixed-field length?	<input type="button" value="Delimited"/>
Field delimiter (ignored for fixed-field length)	<input type="button" value="Tab"/> <input type="text"/>
	<input type="checkbox"/> Surround field values with quotes (" ")
End-of-line (record) delimiter	<input type="button" value="CR"/> <input type="text"/>
Column Titles	<input checked="" type="checkbox"/> Put column titles on first row
Mime Type (leave blank for default)	<input type="text"/>
Number Of Columns In This Template	2
Total Width	0 (if using fixed-field length)

[Export this template](#)

5. Use the following table to enter information in the fields:

Field	Description
Name of this template	Enter a name for the template.
Export from this table	The table that will be used in the export appears.
Delimited or fixed-field length?	Choose either Delimited or Fixed from the pop-up menu.
Field delimiter	If you chose Delimited in the previous field, use the pop-up menu to choose the field delimiter. This refers to the item that will separate the fields in the exported data. If you choose Other, enter the delimiter in the blank field.  Select the checkbox if you want to surround field values with quotation marks.
End-of-line (record) delimiter	Use the pop-up menu to choose the delimiter for the end of each record. For Other;, enter the delimiter in the blank field.
Column Titles	Select this checkbox to put column titles on the first row.
Mime Type	Enter a MIME type if instructed to do so by PowerSchool Technical Support. Do not perform any procedures related to MIME types without their guidance.
Number of Columns in This Template	The number of columns for the exported data appears.
Total Width	The total width appears if using a fixed-field length instead of a field delimiter.

6. Click Submit. The "Templates for Exporting" page appears. To continue modifying the template, see the section ["How to Edit Template Columns."](#)

## How to Edit Template Columns

1. On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Export Using Template. The Export Using Template page appears.

### Export Using Template

Option	Value
Type of Export:	<input style="width: 100%;" type="text" value="Students"/>

- Click Template. The "Templates for Exporting" page appears.

### Templates for Exporting

Template Name	Export From	# Columns	Width*
<a href="#">Attendance Points</a>	Students	9	0
<a href="#">Attendance Totals for Semester</a>	Students	6	0
<a href="#">HS Registration Master</a>	Students	9	0
<a href="#">MS Registration Master</a>	Students	7	0
<a href="#">Name &amp; Address</a>	Students	4	0
<a href="#">Name and number</a>	Students	0	0
<a href="#">new kindergarten</a>	Students	3	0
<a href="#">WYCAS Export</a>	Students	13	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	1	0
<a href="#">Teacher Lunch Balances</a>	Staff	3	0
<a href="#">Historical Grades</a>	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click the # Columns link of the template to be changed. The Edit Columns page appears.

### Edit Columns - Name and number

Column	Title	Width*	Cumulative Row Width
There are no columns set up for this export template. *Width applies only to fixed-width import templates, not delimited templates. <a href="#" style="color: blue; text-decoration: underline;">Back to Templates for Exporting</a>			

5. Click the title of the column to be changed. The Edit Column page appears.

### Edit Column - Name and number

Option	Value
Title/Heading	<input type="text" value="Student Name"/>
Data To Export (Fields)	<input type="text" value="Last_first"/>
If Blank, Export This	<input type="text" value="[No name associated]"/> (optional)
Column Number	<input type="text" value="1"/> (zero to place at end)
Width in Characters	<input type="text" value="0"/> (used only for fixed field lengths)
Alignment	<input type="text" value="Left"/> (used only for fixed field lengths)

6. Use the following table to enter information in the fields:

Field	Description
Title/Heading	Enter a title for the column.
Data to Export	Enter the fields of data to be exported. To display the field list, click Fields.
If Blank, Export This	If a record has no data for a particular field, indicate a value to replace the blank field (optional). For example, enter No Data.
Column Number	Enter a column number for this column on the template. All column numbers will have a zero added as a suffix to the column number.
Width in Characters	Enter the width of the column in characters if using fixed-field lengths instead of field delimiters.



Field	Description
Alignment	Use the pop-up menu to choose the alignment of the column if using fixed-field lengths instead of field delimiters.

- Click Submit. The Edit Columns page appears.

## How to Delete a Template

- On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

- Click Export Using Template. The Export Using Template page appears.

**Export Using Template**

Option	Value
Type of Export:	<input style="width: 100%;" type="text" value="Students"/>

- Click Template. The "Templates for Exporting" page appears.

**Templates for Exporting**

[New](#)

Template Name	Export From	# Columns	Width*
<a href="#">Attendance Points</a>	Students	9	0
<a href="#">Attendance Totals for Semester</a>	Students	6	0
<a href="#">HS Registration Master</a>	Students	9	0
<a href="#">MS Registration Master</a>	Students	7	0
<a href="#">Name &amp; Address</a>	Students	4	0
<a href="#">Name and number</a>	Students	0	0
<a href="#">new kindergarten</a>	Students	3	0
<a href="#">WYCAS Export</a>	Students	13	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	1	0
<a href="#">Teacher Lunch Balances</a>	Staff	3	0
<a href="#">Historical Grades</a>	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

- Click the name of the template to be deleted. The Edit Export Template page appears.

**Edit Columns - Name and number**

[New](#)

Column	Title	Width*	Cumulative Row Width
There are no columns set up for this export template.			

\*Width applies only to fixed-width import templates, not delimited templates.

[Back to Templates for Exporting](#)

- Click Delete. The "Templates for Exporting" page appears.

## How to Delete Template Columns

- On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

2. Click Export Using Template. The Export Using Template page appears.

### Export Using Template

Option	Value
Type of Export:	<div style="border: 1px solid black; padding: 2px;">Students</div>

3. Click Template. The "Templates for Exporting" page appears.

### Templates for Exporting

Template Name	Export From	# Columns	Width*
<a href="#">Attendance Points</a>	Students	9	0
<a href="#">Attendance Totals for Semester</a>	Students	6	0
<a href="#">HS Registration Master</a>	Students	9	0
<a href="#">MS Registration Master</a>	Students	7	0
<a href="#">Name &amp; Address</a>	Students	4	0
<a href="#">Name and number</a>	Students	0	0
<a href="#">new kindergarten</a>	Students	3	0
<a href="#">WYCAS Export</a>	Students	13	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	0	0
<a href="#">Example</a>	Staff	1	0
<a href="#">Teacher Lunch Balances</a>	Staff	3	0
<a href="#">Historical Grades</a>	Historical Grades	1	0

\*Width applies only to fixed-width import templates, not delimited templates.

[Main Import/Export Menu](#)

4. Click the # Columns link of the template to be changed. The Edit Columns page appears.

### Edit Columns - Name and number

Column	Title	Width*	Cumulative Row Width
There are no columns set up for this export template. *Width applies only to fixed-width import templates, not delimited templates. <a href="#" style="color: blue; text-decoration: none;">Back to Templates for Exporting</a>			

- Click the title of the column to be deleted. The Edit Column page appears.

### Edit Column - Name and number

Option	Value
Title/Heading	<input type="text" value="Student Name"/>
Data To Export (Fields)	<input type="text" value="Last_first"/>
If Blank, Export This	<input type="text" value="[No name associated]"/> (optional)
Column Number	<input type="text" value="1"/> (zero to place at end)
Width In Characters	<input type="text" value="0"/> (used only for fixed field lengths)
Alignment	<input type="text" value="Left"/> (used only for fixed field lengths)

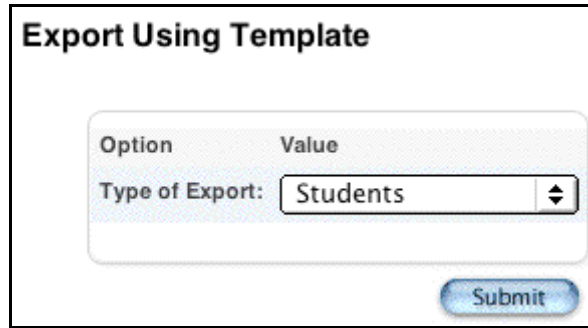
- Click Delete. The Edit Columns page appears.

## How to Export Using a Template

- On the start page, select the group of students.

**Note:** Depending on the selection method you used, the Group Functions page appears either immediately or after selecting students from the Student Selection page. If the Student Selection page appears, choose the function in the next step from the group functions pop-up menu.

- Click Export Using Template. The Export Using Template page appears.

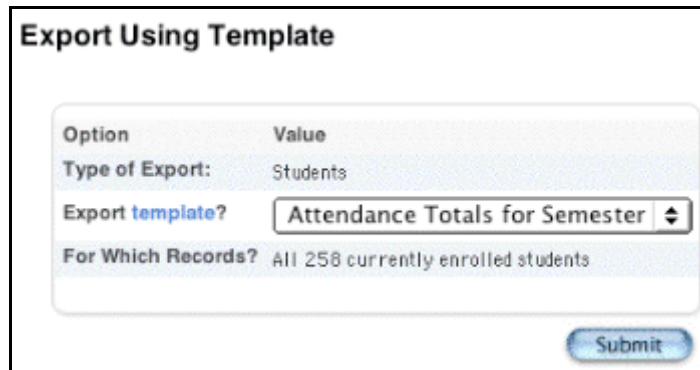


**Export Using Template**

Option	Value
Type of Export:	Students

Submit

- Choose the type of data to export from the "Type of Export" pop-up menu. The Export Using Template page appears.



**Export Using Template**

Option	Value
Type of Export:	Students
Export template?	Attendance Totals for Semester
For Which Records?	All 258 currently enrolled students

Submit

- Use the following table to enter information in the fields:

Field	Description
Type of Export	The type of data to export appears.
Export template?	Choose the template to export from the pop-up menu.
For Which Records?	The number of selected records appears.

- Click Submit. The results of the export appear.
- Choose File > Save As....
- In the Save dialog, specify a name, location, and file type.
- Click Save. Open the file using a spreadsheet or other application.

## AutoSend Setup

Create AutoSend records to determine that your PowerSchool system can automatically create a copy of the information you specify at the selected date and time intervals, and export the file to another system.

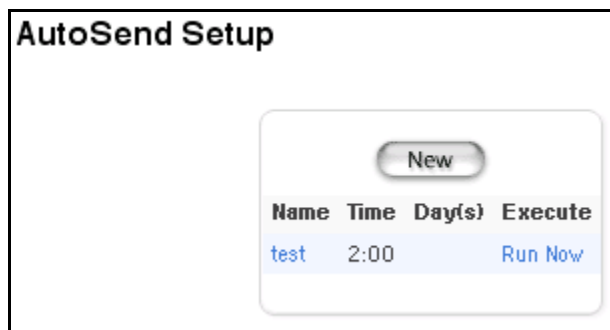
When creating an AutoSend record, you can determine the export parameters for each of the following types of data:

- Attendance

- Course
- Section
- Student schedule
- Student demographic
- Teacher

## How to Add an AutoSend Record

1. On the start page, choose System from the main menu.
2. Click AutoSendSetup. The AutoSend Setup page appears.



3. Click New. The AutoSend Record page appears.

**AutoSend Record**

<b>Field</b>	<b>Value</b>
Name	<input type="text"/>
Data to Send	Attendance
When to Execute	2 AM :00
Days to Execute	(MTWTFSS)
Turn Execution Off	<input type="checkbox"/>
<input type="checkbox"/> Use FTP <input type="checkbox"/> Use password mode	FTP host name: <input type="text"/> FTP user name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (Default = 10 seconds): <input type="text"/>
Path	<input type="text"/>
Field Delimiter	Tab
Record Delimiter	CRLF
Sort Order	<input type="text"/>
First record of file is "number_of_records="	<input type="checkbox"/>
Include "upload_type="	<input type="checkbox"/>
<b>Attendance-Specific Settings:</b>	<input checked="" type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From <input type="text"/> To <input type="text"/> <input type="radio"/> Send all attendance to date
<b>Student-Specific Settings:</b>	<input type="checkbox"/> All current students at the school are automatically sent
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
Fields to export:	<input type="text" value="Field list"/>
<input type="checkbox"/> Duplicate this AutoSend record to all schools on this course (use only when creating a new AutoSend record) <small>A The first record of the export will be the text "number_of_records=" followed by the number of records to be exported.            B The first or second record of the export will be the text "upload_type=" followed by the upload type.</small>	
<input type="button" value="Submit"/>	

4. Use the following table to enter information in the fields:

Field	Description
Name	Enter the name of this record.
Data to Send	Use the pop-up menu to choose the data you want to send with this record: <ul style="list-style-type: none"> <li>• Attendance</li> <li>• Courses</li> <li>• Sections</li> <li>• Student Schedules</li> <li>• Students</li> <li>• Teachers</li> </ul>
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically export a copy of the data.

Field	Description
Days to Execute	Enter the days of the week you want the system to export the data. Starting with Monday, use the following abbreviations: <b>MTWHFSU</b> .
Turn Execution Off	Select this checkbox to stop the system from automatically exporting data. To turn AutoSend on, deselect this checkbox.
Use FTP	If you want to use the file transfer protocol (FTP) to export the data to the other system, enter information in the following fields: <ul style="list-style-type: none"> <li>• FTP host name</li> <li>• FTP account name</li> <li>• FTP password</li> <li>• Timeout in seconds (optional). Default is 10 seconds.</li> </ul>
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select this checkbox.
Path	If you do not use FTP to send the export file to another system, enter the path to the folder in which you want to save the file on your PowerSchool server.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the export file: <ul style="list-style-type: none"> <li>• Tab</li> <li>• Comma</li> </ul>
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: <ul style="list-style-type: none"> <li>• CRLF: carriage return, line feed</li> <li>• CR: carriage return</li> <li>• LF: line feed</li> </ul>
Sort Order	Enter the order that this record appears on the AutoSend Setup page.
First record of file is number_of_records=	The system does not export the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select this checkbox.
Include upload_type	If you select this checkbox, the first or second record of the export includes the text "upload_type=", followed by the upload type.



Field	Description
Attendance-Specific Settings	<p>If you chose Attendance from the "Data to Send" pop-up menu, select one of the following options to indicate which attendance data you want the system to include in the export file:</p> <ul style="list-style-type: none"> <li>• Send any attendance modified in the last 24 hours.</li> <li>• Send attendance modified since last upload.</li> <li>• Send attendance data modified between these dates: Enter the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.</li> <li>• Send all attendance to date.</li> </ul> <p>Otherwise, leave this field blank.</p>
Student-Specific Settings	<p>If you chose Students from the "Data to Send" pop-up menu, the page indicates that the system includes all students currently enrolled at your school in the export file.</p>
E-Mail completion report to	<p>Enter the email addresses of the people you want the system to send a completion report to each time it exports this file. Separate multiple addresses with commas.</p>
Fields to export	<p>Choose the PowerSchool fields to include in this export file from the Field List pop-up menu.</p>
Duplicate this AutoSend record to all schools on this server	<p>If you are creating this record for the first time, you can select this checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect this checkbox.</p>

5. Click Submit. The AutoSend Setup page displays the new AutoSend record.

**AutoSend Setup**

Name	Time	Day(s)	Execute
Student attendance	2:00	u	<a href="#">Run Now</a>
test	2:00		<a href="#">Run Now</a>

## How to Edit an AutoSend Record

1. On the start page, choose System from the main menu.
2. Click AutoSend Setup. The AutoSend Setup page appears.

### AutoSend Setup

Name	Time	Day(s)	Execute
Student attendance	2:00	u	<a href="#">Run Now</a>
test	2:00		<a href="#">Run Now</a>

3. Click the AutoSend record to be edited in the Name column. The AutoSend Record page appears.

### AutoSend Record

Field	Value
Name	<input type="text" value="Student attendance"/>
Data to Send	<input type="text" value="Attendance"/>
Time to Execute	<input type="text" value="2 AM"/> <input type="text" value="10"/>
Days to Execute	<input type="text" value="u"/> (MTWTFSS)
Time Execution Off	<input type="checkbox"/>
<input type="checkbox"/> Use FTP <input checked="" type="checkbox"/> Use password mode	FTP host name: <input type="text"/> FTP user name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (options: 0, default = 10 seconds): <input type="text" value="0"/>
Path	<input type="text"/>
Field Delimiter	<input type="text" value="Tab"/>
Record Delimiter	<input type="text" value="CR LF"/>
Sort Order	<input type="text" value="0"/>
First record of file is "number of records" *	<input type="checkbox"/>
Include "upload_type" **	<input type="checkbox"/>
Attendance-Specific Settings:	<input checked="" type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From <input type="text" value="0000"/> to <input type="text" value="0000"/> <input type="radio"/> Send all attendance to date
Student-Specific Settings:	<input type="text" value="all current students at the school are automatically sent"/>
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
Fields to export:	<input type="text" value="Field list"/> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;">           student_number            code         </div>
<input type="checkbox"/> Duplicate this AutoSend record to all schools on this server (one only when creating a new AutoSend record) <small>* The first record of the export will be the text "number of records" followed by the number of records to be exported.            ** The first or second record of the export will be the text "upload_type" followed by the upload type.</small>	
<input type="button" value="Delete"/> <input type="button" value="Submit"/>	

4. Use the following table to edit information in the fields:

Field	Description
Name	Edit the name of this record.
Data to Send	Use the pop-up menu to choose the data you want to send with this record: <ul style="list-style-type: none"> <li>• Attendance</li> <li>• Students</li> <li>• Teachers</li> </ul>
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically export a copy of the data.
Days to Execute	Edit the days of the week you want the system to export the data. Starting with Monday, use the following abbreviations: MTWHFSU.
Turn Execution Off	Select this checkbox to stop the system from automatically exporting data. To turn AutoSend on, deselect the checkbox.
Use FTP	If you want to use the file transfer protocol (FTP) to export the data to the other system, edit information in the following fields: <ul style="list-style-type: none"> <li>• FTP host name</li> <li>• FTP account name</li> <li>• FTP password</li> <li>• Timeout in seconds (optional). Default is 10 seconds.</li> </ul>
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select this checkbox.
Path	If you do not use FTP to send the export file to another system, edit the path to the folder where you want to save the file on your PowerSchool server.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the export file: <ul style="list-style-type: none"> <li>• Tab</li> <li>• Comma</li> </ul>
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: <ul style="list-style-type: none"> <li>• CRLF: carriage return, line feed</li> <li>• CR: carriage return</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• LF: line feed</li> </ul>
Sort Order	Edit the order that this record appears on the AutoSend Setup page.
First record of file is number_of_records=	The system does not export the file if the number of records in it does not match the number given in the first record of the file. It is recommended that you select this checkbox.
Include upload_type	If you select this checkbox, the first or second record of the export includes the text "upload_type=", followed by the upload type.
Attendance-Specific Settings	<p>If you chose Attendance from the "Data to Send" pop-up menu, select one of the following options to indicate which attendance data you want the system to include in the export file:</p> <ul style="list-style-type: none"> <li>• Send any attendance modified in the last 24 hours.</li> <li>• Send attendance modified since last upload.</li> <li>• Send attendance data modified between these dates: Enter the date range using the format mm/dd/yyyy or mm-dd-yyyy. If you do not use this format, an alert appears. If you submit the date with an incorrect format, the date field will be submitted as a blank entry.</li> <li>• Send all attendance to date.</li> </ul> <p>Otherwise, leave this field blank.</p>
Student-Specific Settings	If you chose Students from the "Data to Send" pop-up menu, the page indicates that the system includes all students currently enrolled at your school in the export file.
E-Mail completion report to	Edit the email addresses of the people you want the system to send a completion report to each time it exports this file. Separate multiple addresses with commas.
Fields to export	Choose the PowerSchool fields to include in this export file from the Field List pop-up menu.
Duplicate this AutoSend record to all schools on this server	If you are creating this record for the first time, you can select this checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect this checkbox.

5. Click Submit. The AutoSend Setup page displays the edited AutoSend record.

**AutoSend Setup**

New

Name	Time	Day(s)	Execute
Student attendance	2:00	u	Run Now
test	2:00		Run Now

### How to Delete an AutoSend Record

1. On the start page, choose System from the main menu.
2. Click AutoSendSetup. The AutoSend Setup page appears.

**AutoSend Setup**

New

Name	Time	Day(s)	Execute
Student attendance	2:00	u	Run Now
test	2:00		Run Now

3. Click the AutoSend record to be deleted in the Name column. The AutoSend Record page appears.

**AutoSend Record**

Field	Value
Name	Student attendance
Data to Send	Attendance
Time to Execute	2 AM 10
Days to Execute	1 (MTWTFSS)
Run Execution Off	<input type="checkbox"/>
Use FTP <input checked="" type="checkbox"/> Use password mode	FTP host name: <input type="text"/> FTP user name: <input type="text"/> FTP password: <input type="text"/> Timeout in seconds (optional): <input type="text"/> (default = 10 seconds)
Path	<input type="text"/>
Field Delimiter	Tab
Record Delimiter	CR LF
Sort Order	0
First record of file is "number of records"	<input type="checkbox"/>
Include "upload_type"	<input type="checkbox"/>
Attendance-Specific Settings:	<input checked="" type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From: <input type="text"/> To: <input type="text"/> <input type="radio"/> Send all attendance to date
Student-Specific Settings:	All current students at the school are automatically sent.
E-Mail completion report to (Separate multiple addresses with commas)	<input type="text"/>
Fields to export:	<input type="text"/> student_number <input type="text"/> code
Field list:	<input type="text"/>

Duplicate this AutoSend record to all schools on this server (use only when creating a new AutoSend record)  
\* The first record of this export will be the text "number of records" followed by the number of records to be exported.  
 \*\* The first or second record of the export will be the text "upload\_type" followed by the upload type.

- Click Delete. The AutoSend Setup page displays without the deleted AutoSend record.

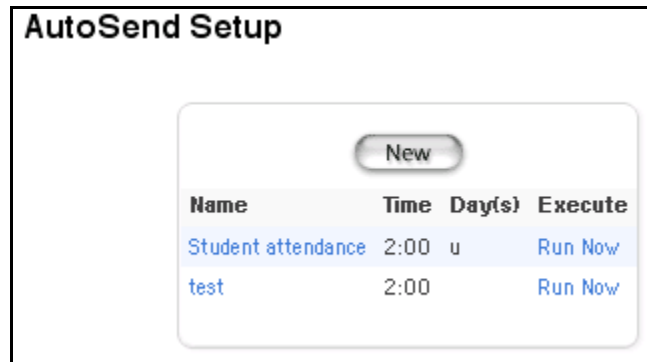
**AutoSend Setup**

Name	Time	Day(s)	Execute
test	2:00		Run Now

## How to Run an AutoSend Record

Manually run an AutoSend record to avoid waiting for the process to automatically run on the specified day and time.

- On the start page, choose System from the main menu.
- Click AutoSend Setup. The AutoSend Setup page appears.



- Click Run Now. The AutoSend record runs and displays the results.

```
645236526 9/6/2001 A 2011 3 2106055 645236739
8/30/2001 A 8031 01 2106055 645236739 8/31/2001
A 8031 01 2106055 645236739 9/3/2001 A 8031 01
2106055 645236739 9/4/2001 A 8031 01 2106055
645236739 9/5/2001 A 8031 01 2106055 645236739
9/6/2001 A 8031 01 2106055 645236739 9/7/2001 A
8031 01 2106055 645236739 8/30/2001 A 2033 1
2106055 645236739 8/31/2001 A 2033 1 2106055
645236739 9/3/2001 A 2033 1 2106055 645236739
9/4/2001 A 2033 1 2106055 645236739 9/5/2001 A
```

## Direct Database Export

Direct Database Access (DDA), also called Universal Search & Modify (USM), is one of the most versatile features of your PowerSchool system. Use DDA to search and match data in all of the internal tables on your PowerSchool server.

**Note:** Depending on your security settings, you may not be able to perform all functions.

PowerSchool data is stored in a relational database of tables. Each table contains an unlimited number of fields. When you use DDA, you directly access a table in the relational database.

Use PowerSchool's Direct Database Export (DDE) page when you need to create an export file or report that contains records from the tables. Use another application, such as a spreadsheet application, to view or organize the records. Unlike using the Export Using Template page, you can match and export data from two related tables.

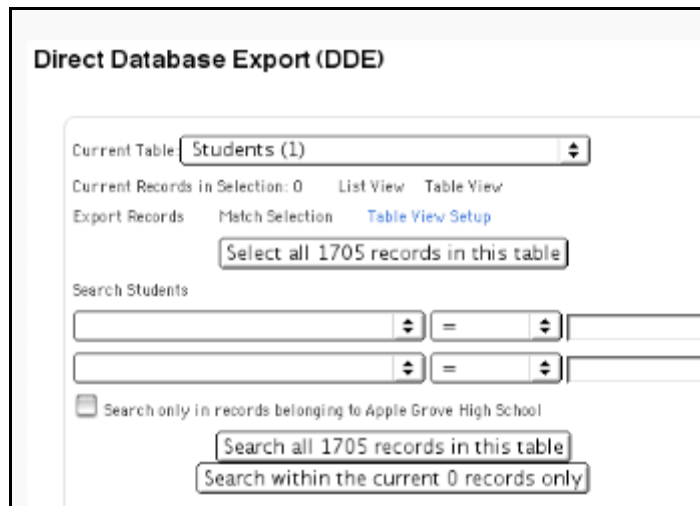
You do not have to access DDA to export data from it. You can export DDA data while you are logged in to PowerSchool. When you export data from DDA, the system creates an independent export file that you can open or update using any application you want.

For example, assume you want to export all ninth graders and their current grades to a software application in which you can create a pie graph. Use the DDE function to match the records in the student table to the current grades table; then, export both tables of data, open the export file in a spreadsheet application, and create the graph.

## How to Select Records for Export-List View

View a list of all records in a selected table or search for specific records in a table. You can also limit the export to records for all schools on your system or for just one school. For example, export student data about California residents in fourth grade or above who attend all schools on the system.

1. On the start page, choose System from the main menu.
2. Click Direct Database Export. The Direct Database Export (DDE) page appears.



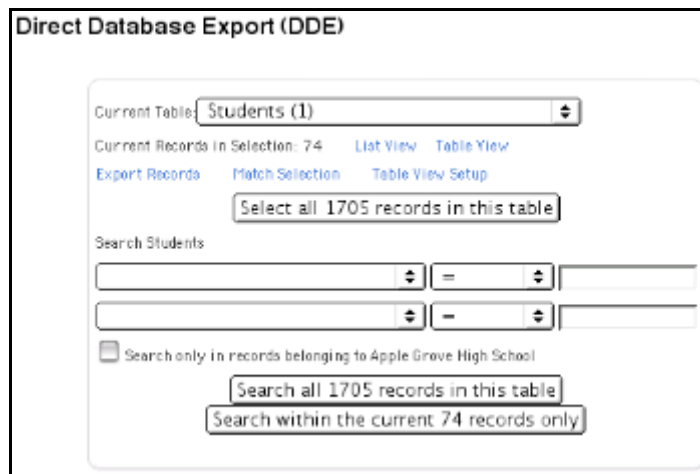
3. Use the following table to enter information in the fields:

Field	Description
Current Table	Choose the table from which you want to export records from the pop-up menu.  <b>Note:</b> For a complete list of PowerSchool tables and fields, see <a href="http://your.school.address/admin/home?ac=structure">http://your.school.address/admin/home?ac=structure</a> .
Select all [x] records in this table	To indicate the records to use in the export, do one of the following: <ul style="list-style-type: none"> <li>• Click "Select all [number of] records in this table" to select all records and skip to step 10.</li> <li>• Identify search criteria in the Search Students fields by continuing to the next step.</li> </ul> <b>Note:</b> Search for students either on the Search Students page before beginning this procedure or on the Direct Database Export page. Repeat steps 5-7 to use the second search field on the Direct Database Export page, or repeat steps 5-9 to narrow the search results even further.



Field	Description
Search Students	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: <ul style="list-style-type: none"> <li>• Equals (=)</li> <li>• Less than (&lt;)</li> <li>• Greater than (&gt;)</li> <li>• Less than or equal to (&lt;=)</li> <li>• Greater than or equal to (&gt;=)</li> <li>• Does not equal (#)</li> <li>• Contains (contains)</li> <li>• Does not contain (!Contain)</li> </ul> Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select this checkbox to filter your school's records in the search.

- Click "Search within the current [# of selected] records only." The Direct Database Export (DDE) page displays the new number of current records in selection.



- Click List View to make sure you selected the records you want to export. The List Records: [Table name] page appears with the fields separated by five periods.

**List Records: Students**

Records: 74

ID	LastFirst	First_Name	Middle_Name	Last_Name	Student_Number
1.	5416	Wolstenholme, Aaron	Aaron	Wolstenholme	25156
2.	5417	Wolf, Keltson	Keltson	Wolf	25157
3.	5416	Winder, Brett	Brett	Winder	25158
4.	5414	Wiese, Johnny	Johnny	Wiese	25160
5.	5413	Zitting, Kristin K.	Kristin	K. Zitting	25161
6.	5412	Yavdrey, Hadley	Hadley	Yavdrey	25162
7.	5411	Thompson, Nicholas W.	Nicholas	W. Thompson	25163
8.	5409	Taylor, Eric P.	Eric	P. Taylor	25165
9.	5407	Spencer, Haylie	Haylie	Spencer	25167
10.	5403	Shinsel, Ian	Ian	Shinsel	25171
11.	5402	Rushton, Daniel	Daniel	Rushton	25172
12.	5400	Rostrom, Daniel	Daniel	Rostrom	25174
13.	5399	Quibell, Charlee R.	Charlee	R. Quibell	25175
14.	5398	Powell, Jessica	Jessica	Powell	25176
15.	5397	Richards, Dillon D.	Dillon	D. Richards	25177
16.	5396	Park, Brandie R.	Brandie	R. Park	25178
17.	5395	Ostler, Ashley D.	Ashley	D. Ostler	25179
18.	5394	Olney, Kaemi	Kaemi	Olney	25180
19.	5393	North, Kellian	Kellian	North	25181
20.	5392	Pingel, Dustin	Dustin	Pingel	25182

**Note:** Click the field value to link to the Display Record page.

## How to Select Records for Export-Table View

View a report in a table format of all records in a selected table, or search for specific records in a table. You can also limit the export to records for all schools on your system or just one school. For example, export student data about California residents in fourth grade or above who attend all schools on the system.

To modify the format of the table view, see the section "[How to Format the DDE Table View.](#)"

1. On the start page, choose System from the main menu.
2. Click Direct Database Export. The Direct Database Export (DDE) page appears.

**Direct Database Export (DDE)**

Current Table:

Current Records in Selection: 0    List View    Table View

Export Records:    Match Selection    [Table View Setup](#)

Search Students

Search only in records belonging to Apple Grove High School

3. Use the following table to enter information in the fields:

Field	Description
Current Table	Choose the table from which you want to export records from the pop-up menu.  <b>Note:</b> For a complete list of PowerSchool tables and fields, see <a href="http://your.school.address/admin/home?ac=structure">http://your.school.address/admin/home?ac=structure</a> .
Select all [x] records in this table	To indicate the records to use in the export, do one of the following: <ul style="list-style-type: none"> <li>• Click "Select all [number of] records in this table" to select all records and skip to step 10.</li> <li>• Identify search criteria in the Search Students fields by continuing to the next step.</li> </ul> <b>Note:</b> Search for students either on the Search Students page before beginning this procedure or on the Direct Database Export page. Repeat steps 5-7 to use the second search field on the Direct Database Export page, or repeat steps 5-9 to narrow the search results even further.
Search Students	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: <ul style="list-style-type: none"> <li>• Equals (=)</li> <li>• Less than (&lt;)</li> <li>• Greater than (&gt;)</li> <li>• Less than or equal to (&lt;=)</li> <li>• Greater than or equal to (&gt;=)</li> <li>• Does not equal (#)</li> <li>• Contains (contains)</li> <li>• Does not contain (!Contain)</li> </ul> Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select this checkbox to filter your school's records in the search.

4. Click "Search within the current [# of selected] records only." The Direct Database Export (DDE) page displays the new number of current records in selection.

**Direct Database Export (DDE)**

Current Table:

Current Records in Selection: 74    [List View](#)    [Table View](#)

[Export Records](#)    [Match Selection](#)    [Table View Setup](#)

Search Students

=

-

Search only in records belonging to Apple Grove High School

- Click Table View to make sure you selected the records you want to export. The List Records: [Table name] page appears with the records in a table format.

**List Records: Students** Hobble Creek High School

[1-200] [201-400] [401-600] [601-700]

A	LastFirst	ID	Enroll Status	SchoolID	Grade Level	EnrollDate	ExitDate
1	Albousaid, Blake Cole	8505	3	999999	12	8/23/2001	5/25/2002
2	Adams, Michael Bradley	8622	3	999999	12	8/24/2000	5/25/2002
3	Adkins, Katherine Ann	8570	3	999999	12	8/23/2001	5/25/2002
4	Affolter, Adam Richard	12256	3	999999	12	8/24/2000	5/25/2001
5	Affolter, Jesse	18811	0	800	12	8/26/2002	5/31/2003

**Note:** Click the field value to link to the Modify Record page.

## How to Format the DDE Table View

- On the start page, choose System from the main menu.
- Click Direct Database Export. The Direct Database Export (DDE) page appears.
- Click Table View Setup. The DDA/DDE Table View Setup page appears.

**DDA/DDE Table View Setup**

**Settings that apply to Table View**

Maximum number of records per page

Maximum number of fields per table

Maximum number of character per field (default is 80 char.)

Use font tag (unchecked is faster)

Format data (unchecked is faster)

Use gridlines

Alternate colors (unchecked is faster)

Use Cell padding (usually 0-3)

[Back to Direct Database Main Screen](#)

4. Use the following table to enter information in the fields:

Field	Description
Maximum number of records per page	Enter the maximum number of records you want to appear on each page of the table.
Maximum number of fields per table	Enter the maximum number of fields you want the table to display.
Maximum number of character per field	Enter the maximum number of characters each field in the table can display.
Use font tag	Select this checkbox to apply font formats. Otherwise, deselect this checkbox.
Format data	Select this checkbox if you want the system to format the data within the table. Otherwise, deselect this checkbox.
Use Gridlines	Select this checkbox if you want the table to separate each field of data with gridlines. Otherwise, deselect this checkbox.
Alternate colors	Select this checkbox if you want the table to display each row of data in a different color. Otherwise, deselect this checkbox.
Use Cell padding	Enter a number to indicate how much padding you want each cell of the table to contain around the text. Most users enter a number between 1 and 3.

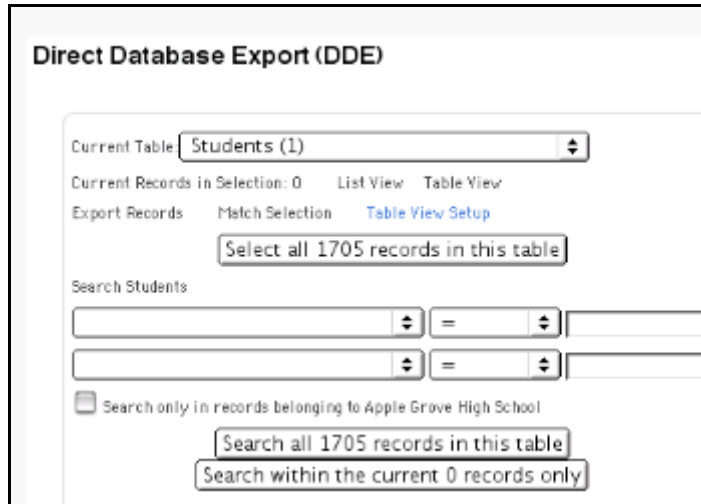
5. Click Submit. The Direct Database Export (DDE) page appears.

## How to Match Selections for Export

Match the records you searched for and selected in one table to records in another table to gather and select information so you can view what you need. For example, match records in the Students table to records in the CC (current grades) table.

**Note:** You cannot match tables that do not have a relationship or shared field. For example, you cannot match the Students table to the Teachers table.

1. On the start page, choose System from the main menu.
2. Click Direct Database Export. The Direct Database Export (DDE) page appears.



**Direct Database Export (DDE)**

Current Table:

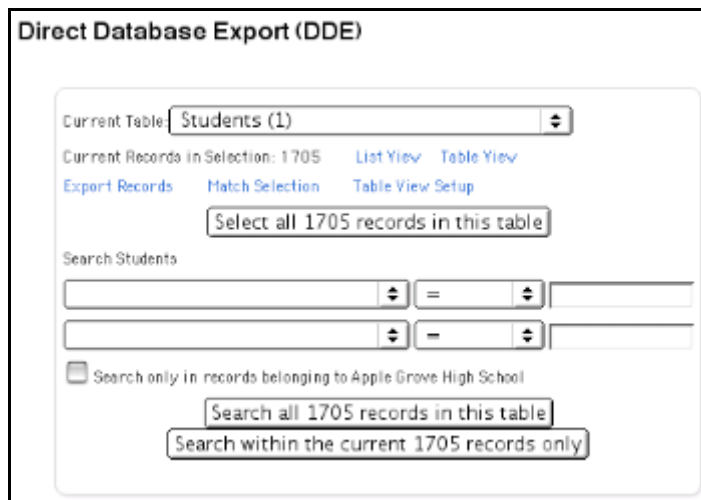
Current Records in Selection: 0 [List View](#) [Table View](#)

Export Records [Match Selection](#) [Table View Setup](#)

Search Students

Search only in records belonging to Apple Grove High School

3. Choose one of the tables to match from the Current Table pop-up menu.
4. Click "Select all [#] records in this table." The Direct Database Export (DDE) page displays the new number of current records in selection.



**Direct Database Export (DDE)**

Current Table:

Current Records in Selection: 1705 [List View](#) [Table View](#)

Export Records [Match Selection](#) [Table View Setup](#)

Search Students

Search only in records belonging to Apple Grove High School

5. Click Match Selection. The Match USM Selection page appears.

### Match USM Selection

Current Table: Students

This function creates a new selection of records in this table (Students), based on the records in the table selected below.

Students ⬇

Note: Not all tables can be used to create selections in this table; there must be a relation between the two tables. For example, records in the Students table may be matched with records from the CC table, because the CC table has a field called StudentID. However, attempting to match the Students table with the Teachers table does not work because the Students table does not have a TeacherID field and the Teachers table does not have a StudentID field.

Note: This function may take several minutes to complete.

[Back to Direct Database Export Main Screen](#)

Proceed to match selection

6. Choose the second table to match from the pop-up menu.
7. Click "Proceed to match selection." The Direct Database Export page displays the total number of records between the two matched tables that you can export. To export the selected records, see the section "[How to Export Records](#)."

## How to Export Records

Select records before exporting using the Direct Database Export function. For more information, see "[How to Select Records for Export-List View](#)," "[How to Select Records for Export-Table View](#)," or "[How to Match Selections for Export](#)."

1. On the start page, choose System from the main menu.
2. Click Direct Database Export. The Direct Database Export (DDE) page appears.

### Direct Database Export (DDE)

Current Table: Students (1) ⬇

Current Records in Selection: 74 [List View](#) [Table View](#)

[Export Records](#)   [Match Selection](#)   [Table View Setup](#)

Select all 1705 records in this table

Search Students

⬇ =   ⬇

⬇ =   ⬇

Search only in records belonging to Apple Grove High School

Search all 1705 records in this table

Search within the current 74 records only

3. Select records for exporting. For more information, see "[How to Select Records for Export-List View](#)," "[How to Select Records for Export-Table View](#)," or "[How to Match Selections for Export](#)."
4. Click Export Records. The Export Records page appears.

### Export Records

**Export the 263 selected records (Table: Students)**

▼

Student\_Number  
 Last\_Name  
 First\_Name  
 Middle\_Name  
 Grade\_Level  
 Balance1  
 Lunch\_ID

**Field Delimiter**      Tab ▼

**Record Delimiter**      CR ▼

"Surround fields"       Column titles on 1st row

**Optional: Sort Field Name    Direction**

Last_Name	> ▼
	> ▼
	> ▼

[Back to Direct Database Export Main Screen](#)

Submit

5. Use the following table to enter information in the fields:

Field	Description
Fields	<p>Use the pop-up menu to choose the fields from which you want to export a copy of the data. After you choose each field, the system inserts the field name in the text box.</p> <p>To include fields from another table, manually enter the name of the table in brackets, then the field name in the field box. For example, to export fields from the Sections table and include teachers' names, enter [teachers]lastfirst.</p>
Field Delimiter	<p>Use the pop-up menu to choose how you want the system to separate each field in the export file:</p> <ul style="list-style-type: none"> <li>Tab</li> <li>Comma</li> <li>None</li> </ul>



Field	Description
	<ul style="list-style-type: none"> <li>• Other: Enter the delimiter in the blank field.</li> </ul>
Record Delimiter	Use the pop-up menu to choose how you want the system to separate each record in the export file: <ul style="list-style-type: none"> <li>• CR: Carriage return</li> <li>• CRLF: Carriage return and line feed</li> <li>• LF: Line feed</li> <li>• Other: Enter the delimiter in the blank field.</li> </ul>
Surround Fields	Select this checkbox if you want the system to surround each field with quotation marks in the export file. Otherwise, deselect this checkbox.
Column titles on 1st row	Select this checkbox if you want the first row of the export file to have column titles indicating the fields included in each column. Otherwise, deselect this checkbox.
Sorting Records	Determine the order of the records in the export file. Define a primary, secondary, and tertiary sort. In the first field in the Sort Field Name column, enter the field name by which you want to primarily sort the records in the file. Then, select one of the following to determine if you want to sort records by this field in ascending or descending order: <ul style="list-style-type: none"> <li>• &lt; (descending)</li> <li>• &gt; (ascending)</li> </ul>

6. Click Submit. For Mac users, the results of the export appear. For Windows users, continue to the next step.
7. Choose File > Save As....
8. In the Save dialog, specify a name, location, and file type.
9. Click Save. Open the file using a spreadsheet or other application.