Importing and Exporting User Guide

PowerSchool
Student Information System

PEARSON

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This edition applies to Release 4.x of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

The data and names used to illustrate the reports and screen images may include names of individuals, companies, brands, and products. All of the data and names are fictitious; any similarities to actual names are entirely coincidental.

Contents

Introduction

Use this guide to assist you while navigating PowerSchool. This guide is based on the PowerSchool Help system, which you can also use to learn the PowerSchool Student Information System (SIS) and to serve as a reference for your daily work.

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 the Help icon on any page in PowerSchool.

Procedures in this guide describe how to view, add, edit, and delete information in PowerSchool. Depending on your needs and your security permissions, only certain options may be applicable and available to you.

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 be on the menu that results from your previous selection.

Import and Export

Use PowerSchool's import functions to submit large amounts of information into the system. Use the export 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 *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 should 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 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 the "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 a enroll status other than Active, such as Inactive, Graduated Students, or Imported as Historical. In this 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

It is important to spell field names correctly. 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 from what exists in the field list, 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 more information about data codes, go to the Pearson customer portal at https://powersource.pearsonschoolsystems.com. You will need your username and password to log in. If you do not have this information, contact your System Administrator.

Enter the content to include in the report heading using text, some HTML tags, and PowerSchool data codes. For a complete list of field codes, click **View Field List** on the PowerSchool start page.

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 *Alternate Ways to Create Reports* and *Report Templates*.

SIS Repository

The SIS Repository provides quick access to key metrics and not just raw data. These pre-defined SQL queries, known as Data Views, extract data that can be joined together and filtered to provide customized results. For detailed information about the SIS Repository, see the *SIS Repository Guide*, which is available on the Pearson customer portal at https://powersource.pearsonschoolsystems.com.

Quick Import

Use the Quick Import function to bring 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 *How to Import Test Scores*.

How to Use Quick Import

Verify that you are logged in to the appropriate school. If the school is incorrect, click **School** at the top of the page to choose a new school before starting this procedure.

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.
3. Click **Quick Import**. The Quick Import page appears.
4. Use the following table to enter information in the fields:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Table</td><td>Choose the table to which the data will be imported from the pop-up menu:

If you choose the Students table, be sure to import at least 20 student records.
If you choose the Sections table, be sure the target term is selected. For more information, see How to Change Terms.

Note: When importing multiple section records, the expressions of the sections 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 should import the actual values that you want to appear when the system displays expressions. An invalid expression causes an error for that record, which results in the record not being imported.

If you choose the Student schedules table, be sure to include data in the import file for only the following required fields:

Course_Number
Dateenrolled
Dateleft
Expression
Section Number
Student_Number
Termid

</td></tr>
<tr><td>Field delimiter</td><td>Choose the field delimiter from the pop-up menu. This refers to the item that will separate the fields in the exported data.

Tab: Separates fields with a tab
Other: Enter a field delimiter in the blank field, such as a comma
</td></tr>
<tr><td>End-of-line marker</td><td>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.

CR: Carriage return
CRLF: Carriage return line feed
LF: Line feed
Other: Enter a delimiter in the blank field
</td></tr>
<tr><td>Character Set</td><td>Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created:</td></tr>
</table>

Field	Description
	o **Windows ANSI** (Windows) o **Mac Roman** (Mac) o **ISO 8859-1** (Unix)
File to import	Either enter the file path and name of the file to import or click **Choose File**, navigate to the data file, and click **Open**.
Suggest field map	Select the 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.

5. Click **Import**.

   Note: When importing test score data, the Select Test page appears instead. For more information, see *How to Import Test Scores*.

On the resulting Import Records from an ASCII Text File page, determine into which PowerSchool fields the system will import each field of data from the file. For more information, see *How to Enter a New Value in a Field for All Records in the Import 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 Import Records from an ASCII Text File 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.

3. Either click **Submit** or, if applicable, select any combination of the advanced import options. For more information, see *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.
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 from the pop-up menu the **Students**, **Courses**, or **Teachers** table.
Delimited or fixed-length?	Choose from the pop-up menu **Delimited** or **Fixed-field length** for the data format.
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: o **Tab** o **Comma** o **Other**: Enter the type of field delimiter in the adjacent field.
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:

Field	Description
	o **CR**: Carriage return o **CRLF**: Carriage return/line feed o **LF**: Line feed o **Other**: Enter the type of end-of-line delimiter in the adjacent field, such as a semicolon.
Update Mode	Select the checkbox if you want the data in the file you import to update any fields with existing data. Otherwise, deselect the checkbox.
Columns	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. 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 **<tab>**. For example, if the first column in your fixed width file contains the student's phone number, enter **12<tab>home_phone**. If you chose **Delimited**, enter each field name and press Return (Mac) or Enter (Windows).

6. Click **Submit**. The Templates for Importing page displays the new template.

How to Edit an Import Template

Edit 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 the name of the template to be edited in the Template Name column. The Edit Import Template page appears.
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 from the pop-up menu the **Students**, **Courses**, or **Teachers** table.
Delimited or fixed-field length?	Choose from the pop-up menu **Delimited** or **Fixed-field length** for the data format.
Field delimiter	If you chose **Delimited**, use the pop-up menu to choose which delimiter to use to separate the fields in the exported

Field	Description
	data: o **Tab** o **Comma** o **Other**: Enter the type of field delimiter in the adjacent field.
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: o **CR**: Carriage return o **CRLF**: Carriage return/line feed o **LF**: Line feed o **Other**: Enter the type of end-of-line delimiter in the adjacent field, such as a semicolon.
Update Mode	Select the checkbox if you want the data in the file you import to update any fields with existing data. Otherwise, deselect the checkbox.
Columns	Edit the map that determines 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. 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 **<tab>**. For example, if the first column in your fixed width file contains the student's phone number, enter **12<tab>home_phone**. If you chose **Delimited**, enter each field name and press Return (Mac) or Enter (Windows).

6. 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.

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 the name of the template to be deleted in the Template Name column. The Edit Import Template page appears.
5. Click **Delete**. The Templates for Importing page displays without the deleted template.

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 *How to Add an Import Template*.

1. On the start page, choose **Special Functions** from the main menu.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Import Using Template**. The Import Using Template page appears.
4. Use the following table to enter information in the fields:

Field	Description
Import template	Choose the template to use from the pop-up menu. **Note:** 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.

5. 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 *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.
4. Click the name of the template to be exported in the Template Name column. The Edit Import Template page appears.
5. 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.

Students 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. Check with your PowerSchool administrator before using this option. It is a system requirement that you must import at least 20 student records.

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.

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.

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.

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 the checkbox, the system will assign a random course number in the 9000 range.

- To store grades that include neither a letter grade nor any earned credit, select the **Allow grades to be stored which contain both** checkbox.

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.

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. Check with your PowerSchool administrator before using this option.

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. Check with 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 information about importing test scores, see *How to Import Test Scores*.

AutoComm Setup

Use AutoComm to synchronize the data in PowerSchool 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 should import the actual values that you want to appear when the system displays expressions. 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.
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: o **Attendance** o **Students** o **Courses** o **Sections** o **Student schedules** o **Teachers** **Note:** The Attendance Recording Methods choices made on the Attendance Preferences page affect the Attendance table options.
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically import data. **Note:** If the minutes are 00, AutoComm will run after the Hourly Process has completed—not specifically on the hour stated, but within that hour.

Field	Description
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: **MTWHFSU**.
Turn Execution Off	Do one of the following: o Select the checkbox to stop the system from automatically importing data. o Deselect the checkbox to turn AutoComm on.
Use FTP	To use the file transfer protocol (FTP) to import the records from the other system, enter information in the following fields: o FTP host name o FTP account name o FTP password o Timeout in seconds (optional): Default is 10 seconds.
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select the checkbox.
Path	Enter the path to the folder of the file on your computer or network. If using PowerSchool on a single node, the path needs to be defined as being from the root; if using a server array, only the file name should be used and never the path, since there is only one location for AutoComm files to be located on a server array.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the import file: o **Tab** o **Comma**
Record Delimiter	Use the pop-up menu to choose how records are separated in the import file. This selection is specific to the operating system where the import file was created: o **CRLF**: Carriage return, line feed (Windows) o **CR**: Carriage return (Mac) o **LF**: Line feed (Unix)
Character Set	Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created: o **Windows ANSI** (Windows) o **Mac Roman** (Mac)

Field	Description
	o **ISO 8859-1** (Unix)
Sort Order	Enter the order that this record appears on the AutoComm Setup page. If you do not make a selection, the order will be alphabetical by the name of the AutoComm record.
Update existing records with imported data (when applicable)	Do one of the following: o Select the 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. o Deselect the checkbox if you do not want the system to update any record that contains data. **Note:** Only an administrator can update the attendance table. This is to prevent other users from overwriting the administrator's modifications. To avoid accidental overwrites, AutoComm is not set up with administrative rights when running automatically. When importing data to update current attendance records, an administrator can run AutoComm automatically. For more information, see *How to Manually Run an AutoComm Record*.
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 the checkbox. Otherwise, deselect the 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 the 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). Importing to the attendance table requires some specific field names: Daily Attendance - o Student_Number o Att_Date o Schoolid

Field	Description
	o Attendance_CodeID Meeting Attendance - o Student_Number o Att_Date o Course_Number o Section_Number o Schoolid o Attendance_CodeID **Note:** When creating the import file, remove the column headings; only record data should be in the file. Create the file in Excel and save it as a tab- delimited file. The data in the file should be in the same order as the field names listed in the AutoComm Record.
Duplicate this AutoComm record to all schools on this server	If you are creating this record for the first time, select the checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect the checkbox. **Note:** If working in the District mode, you can modify only the Students and Teachers tables.

5. Click **Submit**. The AutoComm Setup page displays the new record.

How to Edit 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 edited in the Name column. The AutoComm Record page appears.
4. 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: o **Attendance** o **Students** o **Courses** o **Sections** o **Student schedules**

Field	Description
	o **Teachers** **Note:** The Attendance Recording Methods choices made on the Attendance Preferences page affect the Attendance table options.
When to Execute	Use the pop-up menus to determine the hour and minutes at which you want PowerSchool to automatically import data. **Note:** If the minutes are 00, AutoComm will run after the Hourly Process has completed—not specifically on the hour stated, but within that hour.
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: **MTWHFSU**.
Turn Execution Off	Select the checkbox to stop the system from automatically importing data. To turn AutoComm on, deselect the checkbox.
Use FTP	To use the file transfer protocol (FTP) to import the records from the other system, edit information in the following fields: o FTP host name o FTP account name o FTP password o Timeout in seconds (optional). Default is 10 seconds.
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select the checkbox.
Path	Edit the path to the folder of the file on your computer or network. If using PowerSchool on a single node, the path needs to be defined as being from the root; if using a server array, only the file name should be used and never the path, since there is only one location for AutoComm files to be located on a server array.
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the import file: o Tab o Comma
Record Delimiter	Use the pop-up menu to choose how records are separated in the import file. This selection is specific to the operating system where the import file was created:

Field	Description
	o **CRLF**: Carriage return, line feed (Windows) o **CR**: Carriage return (Mac) o **LF**: Line feed (Unix)
Character Set	Use the pop-up menu to choose the character set for the import file. This selection is specific to the operating system where the import file was created: o **Windows ANSI** (Windows) o **Mac Roman** (Mac) o **ISO 8859-1** (Unix)
Sort Order	Edit the order that this record appears on the AutoComm Setup page. If you do not make a selection, the order will be alphabetical by the name of the AutoComm record.
Update existing records with imported data (when applicable)	Do one of the following: o Select the 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. o Deselect the checkbox if you do not want the system to update any record that contains data. **Note:** Only an administrator can update the attendance table. This is to prevent other users from overwriting the administrator’s modifications. To avoid accidental overwrites, AutoComm is not set up with administrative rights when running automatically. When importing data to update current attendance records, an administrator can run AutoComm automatically. For more information, see *How to Manually Run an AutoComm Record*.
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 the 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 the 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	Edit the PowerSchool fields in which the system saves each

Field	Description
to import into	value in the import file. After you enter each field code, press RETURN (Mac) or ENTER (Windows). Importing to the attendance table requires some specific field names: Daily Attendance - o Student_Number o Att_Date o Schoolid o Attendance_CodeID Meeting Attendance - o Student_Number o Att_Date o Course_Number o Section_Number o Schoolid o Attendance_CodeID **Note:** When creating the import file, remove the column headings; only record data should be in the file. Create the file in Excel and save it as a tab-delimited file. The data in the file should be in the same order as the field names listed in the AutoComm Record.
Duplicate this AutoComm record to all schools on this server	If you are creating this record for the first time, select the checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect the checkbox. **Note:** If working in the District mode, you can modify only the Students and Teachers tables.

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.
4. Click **Delete**. The Selection Deleted page appears.

How to Manually 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.
3. 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.

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 *How to Export Using a Template*.

In addition to exporting data, the SIS Repository provides quick access to key metrics and not just raw data. For detailed information about the SIS Repository, see the *SIS Repository Guide*, which is available on the Pearson customer portal at https://powersource.pearsonschoolsystems.com. You will need your username and password to log in. If you do not have this information, contact your System Administrator.

How to Use Quick Export

1. On the start page, select the group of students. For more information, see *Select a 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 **Quick Export**. In most cases, you will not need to change the default options on the Export Students page, in which case you can skip the next step. To change the selections, proceed to the next step.
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 needed. Only enter one field per line. Separate multiple fields with a hard return. If you need help remembering field names, click **Fields** at the bottom of the page.
Field Delimiter	A field delimiter separates fields (or "columns") in the exported data. Use the pop-up menu to choose how you want the system to separate each field in the export file: o **Tab**

Field	Description
	o **Comma** o **None** o **Other**: Enter the delimiter in the blank field.
Record Delimiter	A record delimiter separates records (or "rows") in the exported data. Use the pop-up menu to choose how you want the system to separate each record in the export file: o **CR**: Carriage return o **CRLF**: Carriage return and line feed o **LF**: Line feed o **Other**: Enter the delimiter in the blank field.
Surround Fields	Select the checkbox to surround the fields in the exported data with quotation marks.
Column titles on 1st row	Select the checkbox to include column titles on the first row of the exported data.

4. Click **Submit**. The exported data appears.
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 *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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click **New**. The New Export Template page appears.
6. 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 to determine the length of each field.
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 to surround field values with quotation marks.
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 the checkbox to put column titles on the first row.
Mime Type	Enter a MIME type. To use the default MIME type, leave the field blank. For more information, see *MIME Types*.

7. Click **Submit**. The Templates for Exporting page displays the new template. 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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click the # Columns link of the template to be changed. The Edit Columns page appears.
6. Click **New** to add a column to the template. The New Column page appears.
7. Use the following table to enter information in the fields:

Field	Description
Title/Heading	Enter a title for the column.

Field	Description
Data to Export	Enter the fields of data to be exported. To display the field list, click **Fields**. Click a field name to place it in the Data to Export field.
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.

8. Click **Submit**. The Edit Columns page appears.
9. Repeat the previous three steps to add additional columns to the template.
10. 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

When you need a list that differs slightly from the list that a 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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click the name of the template to be edited. The Edit Export Template page appears.
6. Use the following table to enter information in the fields:

Field	Description

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 to determine the length of each field.
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 to surround field values with quotation marks.
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 the 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.

7. Click **Submit**. The Templates for Exporting page appears. To continue modifying the template, see *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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click the # Columns link of the template to be changed. The Edit Columns page appears.
6. Click the Title of the column to be edited. The Edit Column page appears.
7. Use the following table to enter information in the fields:

Field	Description

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**. Click a field name to place it in the Data to Export field.
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.

8. Click **Submit**. The Edit Columns page appears.

How to Delete a Template

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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click the name of the template to be deleted. The Edit Export Template page appears.
6. Click **Delete**. The Templates for Exporting page appears.

How to Delete 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.

3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. Click **Template**. The Templates for Exporting page appears.
5. Click the # Columns link of the template to be changed. The Edit Columns page appears.
6. Click the Title of the column to be deleted. The Edit Column page appears.
7. Click **Delete**. The Edit Columns page appears.

How to Export Using a Template

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.
3. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
4. 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.

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

AutoSend Setup

Create AutoSend records to determine whether 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.
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: o **Attendance** o **Courses** o **Sections** o **Student Schedules** o **Students** o **Teachers** **Note:** Attendance table options are affected by the choice of attendance recording methods. For more information, see *Attendance Preferences*.
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. **Note:** If the minutes are 00, AutoSend runs after the Hourly Process has completed (not specifically on the hour stated but within that hour).
Days to Execute	Enter 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 the checkbox to stop the system from automatically exporting data. To turn AutoSend on, deselect the checkbox.
Use FTP	To use the file transfer protocol (FTP) to export the data to the other system, enter information in the following fields: o **FTP host name** o **FTP account name** o **FTP password** o **Timeout in seconds (optional)**. The default is 10 seconds.
Use Passive Mode	Some FTP servers require passive mode. If your FTP has

Field	Description
	difficulty transferring, select the checkbox.
Path	If you do not use FTP to send the export file to another system, enter the path and name of the file destination on your PowerSchool server. If you use FTP to send the export file to another system, enter the path and file name of the file destination on the FTP server. If this is on a single node, the path must be defined as being from the root. If this is a server array, use only the file name and never the path, since there is only one location for AutoSend files to be imported from on a server array. The file will be exported in text format (.txt).
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the export file: o **Tab** o **Comma**
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: o **CRLF**: carriage return, line feed o **CR**: carriage return o **LF**: line feed
Sort Order	Enter the order that this record appears on the AutoSend Setup page. If you do not make a choice, the order is alphabetical by the name of the AutoSend record.
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 the checkbox.
Include "upload_type"	If you select the checkbox, the first or second record of the export includes the text upload_type=, followed by the upload type.
Attendance-Specific Settings	If you chose Attendance from the Data to Send pop-up menu, select an option to indicate which attendance data you want the system to include in the export file: o **Send any attendance modified in the last 24 hours** o **Send attendance modified since last upload** o **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	Description
	field is submitted as a blank entry. o **Send all attendance to date** Otherwise, leave this field blank.
Student-Specific Settings	If you chose Students from the Data to Send pop-up menu, the system includes all students currently enrolled at your school in the export file.
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 exports this file. Separate multiple addresses with commas.
Fields to export	Choose the PowerSchool fields to include in this export file from the pop-up menu.
Duplicate this AutoSend record to all schools on this server	If you are creating this record for the first time, you may want to select the checkbox to make the record available to all schools that use your PowerSchool system. Otherwise, deselect the checkbox.
Duplicate this AutoSend record to district office	If you are creating this record for the first time, you may want to select the checkbox to make the record available to the district office. Otherwise, deselect the checkbox. **Note:** This option is only for the Students or Teacher tables.

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

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.
3. Click in the Name column the AutoSend record to be edited. The AutoSend Record page appears.
4. Use the following table to edit 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: o **Attendance** o **Courses** o **Sections** o **Student Schedules**

Field	Description
	o **Students** o **Teachers** **Note:** Attendance table options are affected by the choice of attendance recording methods. For more information, see *Attendance Preferences*.
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. **Note:** If the minutes are 00, AutoSend runs after the Hourly Process has completed (not specifically on the hour stated but within that hour).
Days to Execute	Enter 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 the checkbox to stop the system from automatically exporting data. To turn AutoSend on, deselect the checkbox.
Use FTP	To use the file transfer protocol (FTP) to export the data to the other system, enter information in the following fields: o **FTP host name** o **FTP account name** o **FTP password** o **Timeout in seconds (optional)**. The default is 10 seconds.
Use Passive Mode	Some FTP servers require passive mode. If your FTP has difficulty transferring, select the checkbox.
Path	If you do not use FTP to send the export file to another system, enter the path and name of the file destination on your PowerSchool server. If you use FTP to send the export file to another system, enter the path and file name of the file destination on the FTP server. If this is on a single node, the path must be defined as being from the root. If this is a server array, use only the file name and never the path, since there is only one location for AutoSend files to be imported from on a server array. The file will be exported in text format (.txt).
Field Delimiter	Use the pop-up menu to choose one of the following to determine how values are separated in the export file: o **Tab**

Field	Description
	o **Comma**
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: o **CRLF**: carriage return, line feed o **CR**: carriage return o **LF**: line feed
Sort Order	Enter the order that this record appears on the AutoSend Setup page. If you do not make a choice, the order is alphabetical by the name of the AutoSend record.
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 the checkbox.
Include "upload_type"	If you select the checkbox, the first or second record of the export includes the text upload_type=, followed by the upload type.
Attendance-Specific Settings	If you chose Attendance from the Data to Send pop-up menu, select an option to indicate which attendance data you want the system to include in the export file: o **Send any attendance modified in the last 24 hours** o **Send attendance modified since last upload** o **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 is submitted as a blank entry. o **Send all attendance to date** Otherwise, leave this field blank.
Student-Specific Settings	If you chose Students from the Data to Send pop-up menu, the system includes all students currently enrolled at your school in the export file.
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 exports this file. Separate multiple addresses with commas.
Fields to export	Choose the PowerSchool fields to include in this export file from the pop-up menu.
Duplicate this AutoSend record to all	If you are creating this record for the first time, you may want to select the checkbox to make the record available

Field	Description
schools on this server	to all schools that use your PowerSchool system. Otherwise, deselect the checkbox.
Duplicate this AutoSend record to district office	If you are creating this record for the first time, you may want to select the checkbox to make the record available to the district office. Otherwise, deselect the checkbox. **Note:** This option is only for the Students or Teacher tables.

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

How to Delete an AutoSend Record

1. On the start page, choose **System** from the main menu.
2. Click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click in the Name column the AutoSend record to be deleted. The AutoSend Record page appears.
4. Click **Delete**. The AutoSend Setup page displays without the deleted AutoSend record.

How to Manually Run an AutoSend Record

Manually run an AutoSend 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 **AutoSend Setup**. The AutoSend Setup page appears.
3. Click **Run Now**. The AutoSend record runs and displays the results.

Direct Database Export

Direct Database Access (DDA), also called Universal Search & Modify (USM), is one of the most versatile functions 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.

Note: For detailed information about PowerTeacher gradebook administration and setup, see *Enable PowerTeacher for a Selection of Teachers* in the *PowerTeacher Gradebook Administrator Installation and Setup Guide* available on the Pearson customer portal at https://powersource.pearsonschoolsystems.com.

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. **Note:** See http://[your.school.address]/admin/home?ac=structure for a complete list of PowerSchool tables and fields.
Select all [x] records in this table	To indicate the records to use in the export, do one of the following: o Click **Select all [number of] records in this table** to select all records and skip to step 10. o Identify search criteria in the Search Students fields by continuing to the next step. **Note:** 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: o Equals (**=**) o Less than (**<**) o Greater than (**>**) o Less than or equal to (**<=**) o Greater than or equal to (**>=**)

Field	Description
	o Does not equal (**#**) o Contains (**contains**) o Does not contain (**!Contain**) Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select the checkbox to filter your school's records in the search.

4. Click **Search within the current [number of selected] records only**. The Direct Database Export (DDE) page displays the new number of current records in selection.
5. 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.

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 *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.
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. **Note:** See http://[your.school.address]/admin/home?ac=structure for a complete list of PowerSchool tables and fields.
Select all [x] records in this table	To indicate the records to use in the export, do one of the following: o Click **Select all [number of] records in this table** to select all records and skip to step 10. o Identify search criteria in the Search Students fields by continuing to the next step. **Note:** 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

Field	Description
	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: o Equals (**=**) o Less than (**<**) o Greater than (**>**) o Less than or equal to (**<=**) o Greater than or equal to (**>=**) o Does not equal (**#**) o Contains (**contains**) o Does not contain (**!Contain**) Enter the value for the field in the last field.
Search only in records belonging to [school name]	Select the 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.
5. 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.

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

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.
3. Click **Table View Setup**. The DDA/DDE Table View Setup page appears.
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	Enter the maximum number of characters each field in the table can display.

Field	Description
field	
Use font tag	Select the checkbox to apply font formats. Otherwise, deselect the checkbox.
Format data	Select the checkbox if you want the system to format the data within the table. Otherwise, deselect the checkbox.
Use Gridlines	Select the checkbox if you want the table to separate each field of data with gridlines. Otherwise, deselect the checkbox.
Alternate colors	Select the checkbox if you want the table to display each row of data in a different color. Otherwise, deselect the 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.
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.
5. Click **Match Selection**. The Match USM Selection page appears.
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 *How to Export Records*.

How to Export Records

Before exporting records, you must first select the records using the Direct Database Export function.

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

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

Field	Description
Fields	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. Enter as many fields as needed. Only one field appears per line. Separate multiple fields with a hard return. 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**.
Field Delimiter	A field delimiter separates fields (or "columns") in the exported data. Use the pop-up menu to choose how you want the system to separate each field in the export file: o **Tab** o **Comma** o **None** o **Other**: Enter the delimiter in the blank field.
Record Delimiter	A record delimiter separates records (or "rows") in the exported data. Use the pop-up menu to choose how you want the system to separate each record in the export file: o **CR**: Carriage return o **CRLF**: Carriage return and line feed o **LF**: Line feed o **Other**: Enter the delimiter in the blank field.
Surround Fields	Select the checkbox if you want the system to surround each field with quotation marks in the export file. Otherwise, deselect the checkbox.
Column titles on 1st row	Select the checkbox if you want the first row of the export file to have column titles indicating the fields included in each column. Otherwise, deselect the 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 to sort records by this field in ascending or descending order: o **<** (descending) o **>** (ascending)

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.

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