Import and Export User Guide

PowerSchool
Student Information System

PowerSchool

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This edition applies to Release 10 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.

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Preface

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

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

Referenced Sections

This guide is based on the PowerSchool online help, and may include references to sections that are not contained within the guide. See the PowerSchool online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to “Click **File > New > Window**,” begin by clicking **File** on the menu bar. Then, click **New** and **Window**. The option noted after the > symbol will always be on the menu that results from your previous selection.

Notes

It is easy to identify notes because they are prefaced by the text “**Note:**.”

Introduction

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.

Importing Menu

The Importing Menu includes the following information:

Field	Description
Quick Import	Click to import records from an ASCII text file. For more information, see *Quick Import*. **Note:** The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.
Quick Import for State-Specific Extended Tables	Click to import records from an ASCII text file. For more information, see *Quick Import for State-Specific Extended Tables*. **Note:** The Quick Import for State-Specific Extended Tables page is now also accessible via **Start > System > Page and Data Management > Quick Import for State-Specific Extended Tables**.
Import Using Template	Click to import records from an ASCII text file using an import template for Student, Staff, and Course records. For more information, see *Import Using Template*. **Note:** The Import Using Template page is now also accessible via **Start > System > Page and Data Management > Import Using Template**.
Templates for Importing	Click to configure import mapping templates for common imports into Student, Staff, and Course records. For more information, see *Templates for Importing*.

	Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.
Data Import Manager	Click to access the import manager. For more information, see *Data Import Manager*. **Note:** The Data Import Manager page is now also accessible via **Start > System > Page and Data Management > Data Import Manager**.
Data Import Queue	Click to view in progress and completed imports. For more information, see *Data Import Queue*. **Note:** The Data Import Queue page is now also accessible via **Start > System > Page and Data Management > Data Import Queue**.

Exporting Menu

The Exporting Menu includes the following information:

Field	Description
Quick Export	Click to export student data. For more information, see *Quick Export*. **Note:** The Quick Export page is now also accessible via **Start > System > Page and Data Management > Quick Export**.
Export Using Template	Click to export using an existing template. For more information, see *Export Using Template*. **Note:** The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.
Templates for Exporting	Click to set up export templates. For more information, see *Templates for Exporting*.

	Note: The Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.
Data Export Manager	Click to access the export manager. For more information, see *Data Export Manager*. **Note:** The Data Export Manager page is now also accessible via **Start > System > Page and Data Management > Data Export Manager**.

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 *Student Search*.

Importing 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.

Importing Enrollment IDs

Basics

- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is not included in the import, PowerSchool retains the existing value (on an update to a Students table record) or generates a new unique value.
- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is included in the import with data (values), PowerSchool uses the imported value, assuming it is not already in use by another enrollment. If it is in use, an error message indicating such displays.
- If the EnrollmentID column (Students table) or ID column (ReEnrollments table) is included in the import without data (values), PowerSchool generates a new value, even if one already exists. In general, this is not recommended, as existing information may be used for state reporting.

- The Students table allows for updating of records, whereas the ReEnrollments table does not.

Students Table

- In general, it is recommended to not include the EnrollmentID column when importing into the Students table. When the EnrollmentID column is not included, PowerSchool automatically determines if an EnrollmentID value already exists. If one exists, the value is retained. If one does not exist, a value is generated.
- Only under certain circumstances it is recommended to include the EnrollmentID column when importing into the Students table. For example, if a Student record has been deleted and needs to be restored from a test or backup server, including the EnrollmentID column would restore the EnrollmentID value back to what it was prior to the deletion of the record (unless the EnrollmentID was different on the test or backup server, in which case it is recommended to not include the EnrollmentID and let PowerSchool generate one). Note that this is just one example where it is recommended to include the EnrollmentID column when importing into the Students table.
- Importing an EnrollmentID column that does not contain data (or contains values of zero) causes EnrollmentIDs to be regenerated for all the imported records, regardless of whether or not an Enrollment ID exists for the record. In general, including the EnrollmentID column without values (or with values of zero) is not recommended.
- If importing new students, you do not need to include the EnrollmentID column. PowerSchool generates a value during the import.

ReEnrollments Table

- The ReEnrollments table does not allow for updating of records. Therefore, to “update” a record, first export the existing data (including the ID field), delete the existing record and then re-import the record with the updated data. When re-importing, include the ID column with the exported values so that the ID will not be regenerated.
- If the ID is left blank or if the ID column is not included, a new ID is generated. In general, this is not recommended as existing information may be used for state reporting.
- “Updating” should be done with caution. It is recommended you perform the update on a test or backup server first prior to performing on a production server.
- If importing new reenrollments, you do not need to include the ID column. PowerSchool generates a value during the import.

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:

- -2 or less = Inactive (Must be set manually by an administrator)
- -1 = Pre-registered
- 0 = Active
- 1 = Inactive (Must be set manually by an administrator)
- 2 = Transferred-Out
- 3 = Graduated Students (Students moved to the "Graduated Students" school.)
- 4 = Imported as Historical
- 5 or higher = Inactive (Must be set manually by an administrator)

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 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 sensitivity 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, see *PowerSchool Data Codes*. You will need your username and password to sign in. If you do not have this information, contact your System Administrator.

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 about importing and exporting report templates, see *Alternate Ways to Create Reports* and *Report Templates*.

SIS Views

SIS Views provide quick access to key metrics and not just raw data. These pre-defined SQL queries extract data that can be joined together and filtered to provide customized results. For detailed information, see the *Data Dictionary SIS Views* available on PowerSource.

Import

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 about importing test results, see *How to Import PowerSchool Test Scores*.

Database Extensions and Quick Import

Database extension fields appear while mapping fields from an import file to PowerSchool. When importing and mapping these fields, keep the following in mind:

- As import/export reads from and writes to a text file, binary data is not supported.
- PowerSchool assumes a user only imports data that was exported, therefore it is also assumed that date formats and any other formats do not need to be error-checked on import. The date format used is mm/dd/yyyy.
- Delimiters occurring in the data are not escaped (for example, fields are delimited by tabs, but one field contains tabs) and can cause problems when importing. Data can be wrapped with double quotes to lessen the issue, but there is still data (ex. double quote + tab + double quote) that can cause the same problems.
- Boolean values will be case insensitive, "true/false" or "t/f" or 1/0.

How to Import Data Using Quick Import

Note: Verify that you are signed 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.

Note: The Quick Import page is now also accessible via **Start > System > Page and Data Management > Quick Import**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. 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 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 (CC table), be sure to include data in the import file for the following required fields:

Student_Number
Course Number
Section Number
DateEnrolled
Dateleft
TermID
SchoolID
Term_Number

Note: If you include the Dropped column in your import file, any record with a value of True will be imported as a dropped enrollment.
If you attempt to choose the Courses table, but it does not appear in the pop-up menu, then the district may only

</td></tr>
</table>

	allow new courses to be created at the district office. For more information, see *How to Edit Course Settings*.
Field Delimiter	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
End-of-Line Marker	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
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: • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** (Unix)
File to Import	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), 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.
School	The name of the school for which you are importing data.

5. Click **Import**. The Import Records from an ASCII Text File page appears.

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

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

Field	Description
From Your File	The fields of the first record from the import file appear.
To PowerSchool	If you select the **Suggest field map** checkbox on the Quick Import page, the PowerSchool fields suggested for each piece of data imported appear. 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.
Check to exclude first row	Do one of the following: • Select the checkbox to prevent importing the header row. • Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row.
The lines below can be used to assign a constant value to field(s) in all of the imported records.	To enter a new value in a PowerSchool field for all records from the import file, such as entering the same city for all student records in an import file: 1. Enter the value you want to import for all records. 2. Use the pop-up menu to choose the PowerSchool field into which the system imports the value.

7. Use the following table to enter information in the Advanced Import Options fields:

Note: Advanced Import Options appear based on the table that was selected from the **Table** pop-up menu.

Table	Description

Attendance	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	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	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	Do the following: • 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 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.
Immunizations	Do the following: • If you do not want the system to import immunization data that already exists for a student, select the **Where values exist in the import file and in PowerSchool, DO NOT IMPORT the values** option. • If you do want the system to import immunization data that already exists for a student, select the **Where values**

	exist in the import file and in PowerSchool, OVERWRITE the values in PowerSchool with the values in the import file option.
Meal Transactions	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	Do the following: • 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.
Students	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.
Student Schedules	Do the following: • Select **Normal Mode** to import records for the active terms of the current school. **Note**: If no SchoolID is included in the import file, the system defaults to this mode. • Select **Synchronize Mode** if your school uses AutoComm to synchronize your data in PowerSchool with data in another system. When selected, all other Advanced Import Options are unavailable and the system defaults to Normal Mode. Synchronize Mode drops existing section enrollments and imports new enrollments from your import file. For example, if a student is currently enrolled in English during second period and the import file contains a record for that student for Science second period, the system will drop the student's section enrollment for English and import the Science section enrollment. **Note**: This change cannot be undone. If course and section numbers are shared across multiple schools, it is recommended that you include the SchoolID in the import file. If course and section numbers are shared across multiple schools and the SchoolID is not included in the import file, the system will not import the records, and the following alert appears, "Not Imported: The import school: ( ) does not match the current school. Skipping Record."

	Warning: Check with your PowerSchool administrator before using this option. • Select **Historical Mode** to import records for any term for the current school. **Note:** This option is not available unless the import files include SchoolID data. • Select **District Mode** to import records for active terms at any school. **Note:** This option is only available when signed in to the district office. • Select **Historical and District Modes** to import records for any terms at any school. **Note:** This option is only available when signed in to the district office.
Teachers	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	For information about importing test results, see *How to Import PowerSchool Test Scores*.

8. Click **Import**. The Importing [File to Import] page displays the processed records. If a record could not be imported due to an error, the row number of the record along with the reason it could not be imported appears. If a record was successfully imported, the row number of the record along with the action taken appears.

Quick Import for State-Specific Extended Tables

Use the Quick Import for State-Specific Extended Tables function to bring a large amount of data into PowerSchool state-specific extended tables. Before completing this procedure, you must have an ASCII text file that contains the data to import and is preferably delimited by tabs.

How to Import Data Using Quick Import for State-Specific Extended Tables

Note: Verify that you are signed 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.

Note: The Quick Import for State-Specific Extended Tables page is now also accessible via **Start > System > Page and Data Management > Quick Import for State-Specific Extended Tables**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Quick Import for State-Specific Extended Tables**. The Quick Import for State-Specific Extended Tables page appears.
4. Use the following table to enter information in the fields:

Field	Description
Table	Choose the extended table to which the data will be imported from the pop-up menu.
Field Delimiter	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
End-of-Line Marker	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
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:

	• **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** (Unix)
File to Import	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), 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.
School	The name of the school for which you are importing data.

5. Click **Import**. The Import Records into an Extended Table from an ASCII Text File page appears.
6. Use the following table to enter information in the fields:

Field	**Description**
From Your File	The fields of the first record from the import file appear.
To	If you select the **Suggest field map** checkbox on the Quick Import page, the PowerSchool fields suggested for each piece of data imported appear. 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.
Check to exclude first row	Do one of the following: • Select the checkbox to prevent importing the header row. • Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row.

Update Existing Rows	Do one of the following: • Select the checkbox if you want the system to update existing rows with data from each import. • Deselect the checkbox if you do not want the system to update any row that contains data.
The lines below can be used to assign a constant value to field(s) in all of the imported records.	To enter a new value in a PowerSchool field for all records from the import file, such as entering the same city for all student records in an import file: 1. Enter the value you want to import for all records. 2. Use the pop-up menu to choose the PowerSchool field into which the system imports the value.

7. Enter information in the Advanced Import Options fields.

   Note: Advanced Import Options appear based on the table that was selected from the **Table** pop-up menu.

8. Click **Submit**. The Importing [File to Import] page displays the processed records. If a record could not be imported due to an error, the row number of the record along with the reason it could not be imported appears. If a record was successfully imported, the row number of the record along with the action taken appears.

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.

Database Extensions and Import Templates

You can specify any database extension fields on the template.

- Delimiters occurring in the data are not escaped (for example, fields are delimited by tabs, but one field contains tabs) and can cause problems when importing. Data can be wrapped with double quotes to lessen the issue, but there is still data (ex. double quote + tab + double quote) that can cause the same problems.
- Boolean values will be case insensitive, "true/false" or "t/f" or 1/0.

How to Add an Import Template

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

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
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 the **Students**, **Courses**, or **Teachers** table from the pop-up menu. **Note:** If **Courses** does not appear in the pop-up menu, then the district may only allow new courses to be created at the district office. For more information, see *How to Edit Course Settings*.
Delimited or fixed-length?	Choose **Delimited** or **Fixed-field length** for the data format from the pop-up menu.
Field delimiter	If you chose **Delimited**, choose which delimiter to use to separate the fields in the exported data from the pop-up menu: • **Tab**

	• **Comma** • **Other**: Enter the type of field delimiter in the adjacent field.
End-of-line (record) delimiter	Choose one of the following to determine how the records are separated in the files you import using this template from the pop-up menu: • **CR**: Carriage return • **CRLF**: Carriage return/line feed • **LF**: Line feed • **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). If you are adding columns for database extensions, enter the extension field name using the format [extension name].[fieldname].

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.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
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 you want to edit. The Edit Import Template page appears.
5. Edit the information as needed. For field descriptions, see *How to Add an Import Template*.
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.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
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 you want to delete. The Edit Import Template page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

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 about creating an import template, see *How to Add an Import Template*.

Note: The Import Using Template page is now also accessible via **Start > System > Page and Data Management > Import Using Template**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
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.

Note: The Templates for Importing page is now also accessible via **Start > System > Page and Data Management > Templates for Importing**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
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.

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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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>
<tr><td>Table to Import</td><td>Use the pop-up menu to choose the table into which you are importing data with this record:
Attendance
Students
Courses
Sections
Student schedules
Teachers
Note: The Attendance Recording Methods choices made on the Attendance Preferences page affect the Attendance table options.</td></tr>
<tr><td>When to Execute</td><td>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.</td></tr>
<tr><td>Days to Execute</td><td>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.</td></tr>
<tr><td>Turn Execution Off</td><td>Do one of the following:
Select the checkbox to stop the system from automatically importing data.
Deselect the checkbox to turn AutoComm on.</td></tr>
<tr><td>Send Output to</td><td>Indicate the method by which you want to import the records from the other system from the pop-up menu.
To use a local (or network shared file system) to import the records from the other system:
Choose Local (or network shared) File System.
To use the file transfer protocol (FTP) to import the records from the other system:</td></tr>
</table>

	1. Choose **Ad Hoc FTP Server**. 2. Enter information in the following fields: • **Use Passive Mode** - If your FTP has difficulty transferring, select the checkbox. • **FTP host name** • **FTP account name** • **FTP password** • **Timeout in seconds** - Indicates the number of second that PowerSchool will try to make the initial FTP connection with the remote system. To use a managed connection, such as SFTP, to import the records from the other system: 1. Choose **Managed Connection.** A second pop-up menu appears. 2. Choose a managed connection from the pop-up menu. **Note:** Managed Connections only appears in the pop-up if configured and download capability is enabled. See **System > System Settings > Plugin Management > Remote Connection Manager**.
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: • **Tab** • **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: • **CRLF**: Carriage return, line feed (Windows) • **CR**: Carriage return (Mac) • **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: • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **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: • 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. • 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 manually. 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). To insert a PowerSchool field into this field: 1. Click **Student Field List** to view a list of PowerSchool student fields. The Student Field List pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Student Field List pop-up closes and the selected field appears. Importing to the Attendance table requires some specific field names: Daily Attendance • Student_Number • Att_Date • Schoolid • Attendance_CodeID Meeting Attendance • Student_Number • Att_Date • Course_Number • Section_Number

	• Schoolid • 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. **Note:** If you are adding database extension fields, enter the extension field name using the format [extension name].[fieldname].
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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.
3. Click the name of the AutoComm record you want to edit. The AutoComm Record page appears.
4. Edit this information as needed. For field descriptions, see *How to Add an AutoComm Record*.
5. Click **Submit**. The AutoComm Setup page displays the edited record.

How to Delete an AutoComm Record

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoComm Setup**. The AutoComm Setup page appears.

3. Click the name of the AutoComm record you want to delete. The AutoComm Record page appears.
4. Click **Delete**.
5. Click **Confirm 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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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.

Data Import Manager

Using the Data Import Manager, you can quickly and easily import data from a text file into PowerSchool.

Note: Currently data may only be imported into the Course Archive, Incident, Student Email, Transportation and Custom Table data sets. Additional data sets will be made available in future releases.

Set Page-Level Permissions

To ensure that only authorized staff members access the data import pages, set page-level permissions for **Start Page > Special Functions** under Functions in the main menu **> Importing & Exporting > Data Import Manager** under Importing. For more information about setting page-level permissions, see *Security Permissions*.

Preparing Your Import File

General Information

Before importing data, you will need to create an import file. When creating your import file, it is important to note the following:

- Do not use a double quote (") as the field delimiter.
- The double quote is a reserved character and may only be used to ignore other delimiters.
- Field delimiters are regarded as literals if the field value is surrounded by double quotes.
- Strings are regarded as literals if surrounded by double quotes.
- Double quotes that are surrounded by double quotes are regarded as part of the value.

Example 1

Field delimiter as a literal in the field value:

First Name, Last Name, Address
John, Smith, "123 Anyplace Dr, Ste 100"

Results:

FirstName	LastName	Address
John	Smith	123 Anyplace Dr, Ste 100

Example 2

Field delimiter as a literal in the field value surrounded by double quotes:

First Name, Last Name, Address
John, Smith, """123 Anyplace Dr, Ste 100"""

Results:

FirstName	LastName	Address
John	Smith	"123 Anyplace Dr, Ste 100"

Example 3

Double quotes used to escape a field delimiter:

First Name, Last Name, Address
John, Smith, 123 Anyplace Dr"," Ste 100

Produces the following results:

FirstName	LastName	Address
John	Smith	123 Anyplace Dr, Ste 100

Example 4

Quote within a field value:

First Name, Last Name, Address
John, Smith, 123 Anyplace """Dr,""" Ste 100

Produces the following results:

FirstName	LastName	Address
John	Smith	123 Anyplace "Dr," Ste 100

Example 5

Without the double quotes, the field delimiter is not escaped:

First Name, Last Name, Address
John, Smith, 123 Anyplace Dr, Ste 100

Produces the following results:

FirstName	LastName	Address	
John	Smith	123 Anyplace Dr	Ste 100

Incident Import File

PowerSchool's Incident Management schema spans several complex tables that would otherwise require multiple separate imports to create a single incident. The incident data set in the Data Import Manager allows administrators to import incident records using a flat file import. The flat-file information is translated behind the scenes to fit the actual tables used for incident records.

A single incident can include multiple attributes, participants, actions, objects, or behaviors. As such, the incident import data set allows these column groups to be repeated in your import file to represent multiple groupings of the above items.

Incident Element Hierarchy

Within the incident element hierarchy, elements are categorized as a parent, sibling, or child element. Parent and sibling elements can be listed in any order. Child elements must be listed after a parent element in order for the fields to be valid.

- Incident
    - Incident_Attribute
    - Action
        - Action_Attribute
    - Object
    - Behavior
    - Participant
        - Participant_Attribute
        - Participant_Role
            - Participant_Object
            - Participant_Action
                - Participant_Action_Attribute
            - Participant_Behavior
                - Participant_Behavior_Action
                    - Participant_Behavior_Action_Attribute

Data Element	Description
Incident	When creating your incident import file, you may include the following data (based on your PowerSchool incident management setup) for each incident you are importing: • Incident_ID

	• Incident_School_Number • Incident_Title • Incident_Description • Incident_Prepared_By • Incident_Incident_Type • Incident_Incident_Date • Incident_Incident_Time • Incident_Time_Frame_Code • Incident_Time_Frame_Subcode • Incident_Time_Frame_Comment • Incident_Financial_Impact • Incident_Location_Code • Incident_Location_Subcode • Incident_Location_Description **Note:** If Incident_School_Number is mapped, then the incident is associated with the mapped school or district office. If Incident_School_Number is not mapped, then the incident is associated with the current school. **Note:** For field descriptions, see *Incident Management*. When importing, these fields may only be mapped once. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Incident_Attribute	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each incident attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Incident_Attribute_Code • Incident_Attribute_Subcode (required if code is divided into sub codes) • Incident_Attribute_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be

	mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Action	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Action_Code • Action_Subcode (required if code is divided into sub codes) • Action_Comment (may be forbidden, allowed or required based on configuration) • Action_Begin_Date • Action_End_Date • Action Taken Detail • Actual_Resolution_Date • Action_Duration_Code • Action_Duration_Subcode (required if code is divided into sub codes) • Action_Duration_Comment (may be forbidden, allowed or required based on configuration) • Action_Assigned_Duration • Action_Actual_Duration • Action_Duration_Notes • Action_Change_Reason • Action_Change_Code • Action_Change_Subcode (required if Action Change Code is broken into sub codes) • Action_Change_Comment (may be forbidden, allowed or required based on action change code configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information,

	see Step 6 of *How to Import Data Using the Data Import Manager*.
Action_Attribute	Within the incident import file, these fields must be listed after an Action in order for the fields to be valid. For each action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Action_Attribute_Code • Action_Attribute_Subcode (required if code is divided into sub codes) • Action_Attribute_Comment (may be forbidden, allowed or required based on configuration) • Action_Attribute_Value (content of value field depends on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Object	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each object in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Object_Code • Object_Subcode (required if code is divided into sub codes) • Object_Comment (may be forbidden, allowed or required based on configuration) • Object_Description • Object_Quantity **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be

	mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Behavior	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each behavior in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Behavior_Code • Behavior_Subcode (required if code is divided into sub codes) • Behavior_Subcode_2 (required if sub codes is divided into sub codes) • Behavior_Subcode_3 (required if sub codes is divided into sub codes) • Behavior_Subcode_4 (required if sub codes is divided into sub codes) • Behavior_Comment (may be forbidden, allowed or required based on configuration) • Behavior_Primary (use value Primary or leave blank) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant	Within the incident import file, these fields must be listed after an Incident in order for the fields to be valid. For each participant in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Student_Number (cannot be populated if Teacher_Number is also populated)

	• Participant_Teacher_Number (cannot be populated if Student_Number is also populated) • Participant_Unknown (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_First (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Middle (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Last (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Position (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Age (cannot be populated if Student_Number or Teacher_Number is also populated) • Participant_Gender (cannot be populated if Student_Number or Teacher_Number is also populated) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Attribute	Within the incident import file, these fields must be listed after a Participant in order for the fields to be valid. For each participant attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Attribute_Code • Participant_Attribute_Subcode (required if code is divided into sub codes)

	• Participant_Attribute_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Role	Within the incident import file, these fields must be listed after a Participant in order for the fields to be valid. For each participant role in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Role_Code (required if preceded by Participant) • Participant_Role_Subcode (required if code is divided into sub codes) • Participant_Role_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Particpant_Object	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant object in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Object_Code • Participant_Object_Subcode (required if code is divided into sub codes)

	• Participant_Object_Comment (may be forbidden, allowed or required based on configuration) • Participant_Object_Description • Participant_Object_Quantity **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Action	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Action_Code • Participant_Action_Subcode (required if code is divided into sub codes) • Participant_Action_Comment (may be forbidden, allowed or required based on configuration) • Participant_Action_Begin_Date • Participant_Action_End_Date • Participant_Action_Taken_Detail • Participant_Actual_Resolution_Date • Participant_Action_Duration_Code • Participant_Action_Duration_Subcode (required if code is divided into sub codes) • Participant_Action_Duration_Comment (may be forbidden, allowed or required based on configuration) • Participant_Assigned_Duration • Participant_Actual_Duration • Participant_Duration_Notes • Participant_Action_Change_Reason • Participant_Action_Change_Code

	• Participant_Action_Change_Subcode (required if code is divided into sub codes) • Participant_Action_Change_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Action_Attribute	Within the incident import file, these fields must be listed after a Participant_Action in order for the fields to be valid. For each participant action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Action_Attribute_Code • Participant_Action_Attribute_Subcode (required if code is divided into sub codes) • Participant_Action_Attribute_Comment (may be forbidden, allowed or required based on configuration) • Participant_Action_Attribute_Value (content of value field depends on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Behavior	Within the incident import file, these fields must be listed after a Participant_Role in order for the fields to be valid. For each participant behavior in the incident data set, you may include the following data (based on your PowerSchool incident management setup):

	• Participant_Behavior_Code • Participant_Behavior_Subcode (required if code is divided into sub codes) • Participant_Behavior_Subcode_2 (required if sub codes is divided into sub codes) • Participant_Behavior_Subcode_3 (required if sub codes is divided into sub codes) • Participant_Behavior_Subcode_4 (required if sub codes is divided into sub codes) • Participant_Behavior_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Primary (use value Primary or leave blank) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Behavior_Action	Within the incident import file, these fields must be listed after a Participant_Behavior in order for the fields to be valid. For each participant behavior action in the incident data set, you may include the following data (based on your PowerSchool incident management setup): • Participant_Behavior_Action_Code • Participant_Behavior_Action_Subcode (required if code is divided into sub codes) • Participant_Behavior_Action_Comment (may be forbidden, allowed or required based on configuration) • Participant_Behavior_Action_Begin_Date • Participant_Behavior_Action_End_Date • Participant_Behavior_Action_Taken_Detail • Participant_Behavior_Action_Actual_Resolution_Date • Participant_Behavior_Action_Duration_Code

	- Participant_Behavior_Action_Duration_Subcode (required if code is divided into sub codes) - Participant_Behavior_Action_Duration_Comment (may be forbidden, allowed or required based on configuration) - Participant_Behavior_Action_Assigned_Duration - Participant_Behavior_Action_Actual_Duration - Participant_Behavior_Action_Duration_Notes - Participant_Behavior_Action_Change_Reason - Participant_Behavior_Action_Change_Code - Participant_Behavior_Action_Change_Subcode (required if code is divided into sub codes) - Participant_Behavior_Action_Change_Comment (may be forbidden, allowed or required based on configuration) **Note:** For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.
Participant_Behavior_Action_Attribute	Within the incident import file, these fields must be listed after a Participant_Behavior_Action in order for the fields to be valid. For each participant behavior action attribute in the incident data set, you may include the following data (based on your PowerSchool incident management setup): - Participant_Behavior_Action_Attribute_Code - Participant_Behavior_Action_Attribute_Subcode (required if code is divided into sub codes) - Participant_Behavior_Action_Attribute_Comment (may be forbidden, allowed or required based on configuration) - Participant_Behavior_Action_Attribute_Value (content of value field depends on configuration)

	Note: For field descriptions, see *Incident Management*. When importing, these fields may be mapped one or more times. For more information, see Step 6 of *How to Import Data Using the Data Import Manager*.

Importing into Custom Tables

The Data Import Manager allows administrators to import data into custom tables. These tables are not part of the core PowerSchool schema, but are created by PowerSchool custom development groups.

- Custom Tables are listed in the Import Into pop-up menu on the Data Import Manager page using the name of the custom table.
- Custom table fields are available for select data sets in the Data Import Manager when mapping fields from the import file to PowerSchool.
    - If the custom table is a 1-to-1 child table, administrators must map one of the fields in the import file to the foreign key field in the custom table.
    - If the custom table is a 1-to-many child table, administrators must map one of the fields in the import file to the foreign key field in the custom table when adding child records.
    - When updating existing records in the custom table, administrators must map one of the fields in the import file to the primary key field. The foreign key field is ignored if the primary key field is mapped and present for the record. This means that it is not possible to update a foreign key value.
    - If the custom table is a stand-alone table that does not have a parent table, administrators must map one of the fields in the import file to the primary key field only when attempting to update an existing record.
- When mapping custom table fields, the fields appear in the following order:
    - If the custom table is a 1-to-1 extension of a core table, after the last core field within the import module, the foreign key to the parent table appears first and then all the other custom table fields appear in alphabetical order.
    - If the custom table is a 1-to-many child extension of a core table, after the core table, the custom child table fields are grouped and appear in alphabetical order. The foreign key to the parent table appears first, the primary key appears second, and then all the other custom table fields appear in alphabetical order.
    - If the custom table is a stand-alone table that does not have a parent table, the primary key appears first and then all the other custom table fields appear in alphabetical order.

- Standard import options are available when importing into a custom table.
    - Administrators can choose whether or not to exclude the first row if it contains headers.
    - Administrators can choose whether or not to update existing records if a match is found.
- Data being imported into a custom table will be validated based on the data type and other field attributes. Data types include:
    - Text must be a text value less than or equal to the database field's length property.
    - Integer must be a whole number less than or equal to 19 digits long.
    - Double must be a numeric value with up to one decimal point and be less than or equal 19 digits long.
    - Boolean must be a numeric value of 0 or 1.
    - Date must be a valid m/d/y format where m can be 1-12, d can be 1-31 and y can be two digits (05) or four digits (2005).
- Import results for an import into a custom table are displayed in the Import Results page.

Import Data Using the Data Import Manager

Once you have prepared your import file, you can import the data using the Data Import Manager.

How to Import Data Using the Data Import Manager

Note: Verify that you are signed 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.

Note: The Data Import Manager page is now also accessible via **Start > System > Page and Data Management > Data Import Manager**.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Use the following table to enter information in the Select Source and Target fields:

Field	Description
Source	Enter the file path and name of the file to import or click **Choose File** (or **Browse**), navigate to the data file, and click **Open**.
Import Into	Indicate which data set you want to import the data into by choosing one of the following from the pop-up menu: • **Course Archive** • **Course Equivalency** • **Incident** • **[Custom Table]** • **Student Email** • **Transportation** **Note:** Custom tables only appear if your district allows importing into custom tables at the school level.
Field Delimiter	Use the pop-up menu to choose which delimiter to use to separate the fields in the exported data from the pop-up menu: • **Tab** • **Comma** • **Other**: Enter the field delimiter in the adjacent field. **Note**: Adjacent field only appears editable if **Other** is selected. **Note:** Only one character may be entered. A double quote character is not allowed. **Note:** This field only appears if applicable to the **Import Into** selection.
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: • **Unicode** • **Windows ANSI** (Windows) • **Mac Roman** (Mac)

	• **ISO 8859-1** (Unix) **Note:** This field only appears if applicable to the **Import Into** selection.

5. Click **Next** or the **Map Columns** header.

   Note: The **Next** button and the **Map Columns** header appear shaded until the **Source** and **Import Into** are populated.

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

Field	Description
Select Template	To apply a template: 1. Click **Select Template**. The Select Import Template pop-up appears. 2. Select the template you want to apply. 3. Note the mapped fields that are included in the template appear in the lower portion of the pop-up. 4. Click **Apply**. The Select Import Template pop-up closes. To delete a template: 1. Click **Select Template**. The Select Import Template pop-up appears. 2. Select the template you want to delete. 3. Click **Delete**. 4. Click **Confirm Delete**. A confirmation message appears. 5. Click **Close**. The Select Import Template pop-up closes. **Note:** If no templates have been saved, this button appears disabled. **Note:** Click column headings to sort templates in ascending order. Click again to sort in descending order.
Import File Column	This section displays the fields from the import file.

<table>
<tr><td>PowerSchool Field</td><td>This section displays the suggested PowerSchool field for each field from the import file. To map a field from the import file, choose a PowerSchool field from the pop-up menu.

Student Email

For Student Email, only Student Number and Email appear mapped. Student Number is required for importing Student Emails. All other imported fields appear blank.

Incident

Primary fields in the Incident data set may only be mapped once. Secondary fields may be mapped one or more times. For more information, see the <u>Incident Import File</u> section under Preparing Your Import File.</td></tr>
<tr><td>Save Template</td><td>If you import the same fields of data frequently, you can create a template so that you don't have to define the field import map every time you perform an import.

To create a new template:

1. Click Save Template. The Save Template pop-up appears.
2. Enter the name of the template.
3. Enter a description of the template.
4. Note the mapped fields that are included in the template.
5. Click Save as New. The Save Template pop-up closes and a confirmation message appears.

To edit a template:

1. Click Save Template. The Save Template pop-up appears.
2. Edit the description of the template.
3. Note the mapped fields that are included in the template.
4. Click Save. The Save Template pop-up closes and a confirmation message appears.</td></tr>
</table>

7. Click **Next** or the **Select Options** header.

Note: The **Next** button and the Select Options header appear shaded until at least one column is mapped, an identifier (required field) is mapped, and the same primary column is not mapped more than once.

8. Use the following table to enter information in the Select Options fields:

Field	Description
Check to exclude the first row.	Do one of the following: • Select the checkbox to prevent importing the header row. • Deselect the checkbox to import the first row. This should be used if your import file does not contain a header row. **Note:** If one or more columns are auto-mapped, the checkbox is automatically selected. If no columns are auto-mapped, the checkbox is not automatically selected.
If a record in the import file matches an existing record in the database, how would you like that record processed?	If you are importing to the Student Email 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 record from the import file**. • If you want the system to update the matching student's record with the data in the import file, select **Update the existing record with information from the file being imported**. **Note:** This field does not appear if you are importing to the Incident table.

9. Click **Import**. The Import Results page displays a summary of the processed records:

Field	Description
Refresh	Click to update the status of the report. To set the automatic page refresh: 1. On the **Refresh** button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes. 2. Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection. 3. To cancel the automatic page refresh, click the arrow and select the **Cancel** button.
Processed # out of # records	The first number represents the number of records processed. The second number represents the total number of records in the import file including the header row.
Failed	**Incident** If a record could not be imported due to an error, the row number of the record along with one of the following reasons appear: • **<code type> sub_code specified without code** Returned if a sub_code was specified without a parent code. • **<code type> comment specified without code** Returned if a comment was specified without a parent code. • **Invalid <code type> code** Returned if the specified code is not valid. • **Specified <code type> code does not allow sub_codes** Returned if a sub_code is specified for a parent code that is not split into sub_codes. • **Specified <code type> sub_code1 does not allow sub_codes** Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes.

	• **Specified <code type> sub_code2 does not allow sub_codes** Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes. • **Specified <code type> sub_code3 does not allow sub_codes** Returned if a sub_code is specified for a parent sub_code that is not split into sub_codes. • **Invalid <code type> sub_code** Returned if the specified sub_code is not defined for the parent code. • **Invalid <code type> sub_code1** Returned if the specified sub_code is not defined for the parent sub_code. • **Invalid <code type> sub_code2** Returned if the specified sub_code is not defined for the parent sub_code. • **Invalid <code type> sub_code3** Returned if the specified sub_code is not defined for the parent sub_code. • **Invalid <code type> sub_code4** Returned if the specified sub_code is not defined for the parent sub_code. • **<code type> comment is not allowed** Returned if a comment was specified but is not allowed for the specified code or sub_code. • **<code type> comment is required** Returned if a comment was not specified but is required for the specified code or sub_code. • **<code type> primary must be primary must be True, False, 1, 0 or Primary** Returned if the specified primary attribute is not valid. • **Multiple <code type> were specified as primary** Returned if the more than one code was specified as primary. • **<code type> code requires sub_code** Returned if the specified code is split into sub_codes and no sub_code was specified. • **<code type> sub_code1 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified.

	• **<code type> sub_code2 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified. • **<code type> sub_code3 requires sub_code** Returned if the specified sub_code is split into sub_codes and no sub_code was specified. **Note:** The <code type> portion of the message will be replace by the applicable code type that had the error. In addition to the above errors, a record may not be imported due to a data validation error. If a data validation error occurs, "[field name]: " appears along with one or more of the following explanations: • **Empty value is not allowed** • **Value may not contain more than [#] character(s)** • **Value must be a number** • **Value must be a valid date** • **Value must be an integer** • **Value must be at least [#]** • **Value must be less than or equal to [#]** • **Value must be on or after [date]** • **Value must be on or before [date]** • **Value must contain at least [#] character(s)** **Student Email** If a record could not be imported due to an error, the row number of the record along with one of the following reasons appear: • **Email already exists** • **Student not found** • **Student number not found** **Note:** Click column heading to sort in ascending order. Click again to sort in descending order.
Imported	If a record was successfully imported, the row number of the record along with one of the following results appears indicating

	whether an imported record was cleared, added, ignored, or updated during the import: • Deleted • Inserted • Skipped • Updated **Note:** Click column heading to sort in ascending order. Click again to sort in descending order.
Download Failed Records	Click to download the failed records. Downloaded file appears in the format of the original import file. This can be used to easily identify which records had problems during import so that corrections can be made and the import can be reattempted. **Note:** This button is only available once the import process has completed.

Data Import Queue

Use the Data Import Queue to view the results of import jobs that you have submitted using the Data Import Manager. When you submit an import request to the system, the system captures the import request and transmits the job to the Data Import Queue. The Data Import Queue page displays the status of the import job as it is processed by the system.

How to Use the Data Import Queue

Note: The Data Import Queue page is now also accessible via **Start > System > Page and Data Management > Data Import Queue**.

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

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Refresh</td><td>Click to update the status of the queue.
To set the automatic page refresh:
On the Refresh button, click the arrow. A pop-up menu displays the units of time you can set for the automatic page updates; 30 seconds, one minute, five minutes, or 10 minutes.
Select a value from the pop-up menu. A countdown clock appears on the Refresh button and displays the time until the page updates, based on your selection.
To cancel the automatic page refresh, click the arrow and select the Cancel button.</td></tr>
<tr><td>Import File</td><td>The name of the imported file.</td></tr>
<tr><td>Import Into</td><td>The data set being imported into.</td></tr>
<tr><td>School</td><td>The name of the school for which the file was imported.</td></tr>
<tr><td>Start Date/Time</td><td>The date and time the import started appears.</td></tr>
<tr><td>End Date/Time</td><td>The date and time the import ended appears.
Note: This field only displays when the import has completed.</td></tr>
<tr><td>Status</td><td>The status of the import appears:
In progress
Complete
Complete with some failures
Click to view the <u>Import Results</u> page.</td></tr>
<tr><td>Delete</td><td>Click to delete the import.</td></tr>
</table>

View Imported Data

Once you imported data, you can then view the imported the data using the appropriate PowerSchool page.

How to View Imported Course By Year Data

Navigate to the View Course Information By Year page for a selected course. For more information, see *How to Edit Course Information*.

How to View Imported Incident Data

Navigate to the Incident Detail page for a selected student. For more information, see *How to Edit a Discipline Incident*.

How to View Imported Student Email Data

Navigate to the Student Email / Email Configuration page for a selected student. For more information, see *How to Configure Student Email*.

How to View Imported Transportation Data

Navigate to the Transportation Entry page for a selected student. For more information, see *How to Edit Transportation Information*.

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 about exporting, see *How to Export Using a Template*.

In addition to exporting data, SIS Views provide quick access to key metrics and not just raw data. For detailed information, see the *Data Dictionary SIS Views* available on PowerSource.

How to Use Quick Export

Note: The Quick Export page is now also accessible via **Start > System > Page and Data Management > Quick Export**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **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.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

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

Field	Description
[Fields to be Exported]	Enter the fields to be included on the exported spreadsheet. Enter as many fields as needed. Enter only one field per line. Separate multiple fields with a hard return. To insert a PowerSchool field into this field:

	1. Click **Fields** at the bottom of the page to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** Database extension fields can be selected on the **Fields** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource.
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: • **Tab** • **Comma** • **None** • **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: • **CR**: Carriage return • **CRLF**: Carriage return and line feed • **LF**: Line feed • **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.
Export DCID	Select the checkbox to export the Student table's unique identifier.

5. Click **Submit**. The exported data appears.
6. 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 about exporting, see *Quick Export*.

Database Extensions and Export Templates

Users can add table extension fields to export templates created for the selected table using the following methods for the Data to Export field:

- For Student and Users tables, click **Fields** and select from the pop-up.
- For Courses, Historical Grades, and Student Schedules tables, enter the database extension field name manually.

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.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

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

5. Click **Template**. The Templates for Exporting page appears.
6. Click **New**. The New Export Template page appears.
7. 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*.

8. 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

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for

Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click **New** to add a column to the template. The New Column page appears.
8. 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 to be included in the export. To insert a PowerSchool field into this field: 1. Click **Fields** to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the **Filter** field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up closes and the selected field appears. **Note:** If you are adding database extension fields for Courses, Historical Grades, and Student Schedules tables, enter the

	extension field name using the format [extension name].[fieldname].
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.

9. Click **Submit**. The Edit Columns page appears.
10. Repeat the previous three steps to add additional columns to the template.
11. 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.

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the name of the template you want to edit. The Edit Export Template page appears.
7. Edit the information as needed. For field descriptions, see *How to Create an Export Template*.
8. Click **Submit**. The Templates for Exporting page appears. To continue modifying the template, see *How to Edit Template Columns*.

How to Edit Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

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

8. Edit the information as needed. For field descriptions, see *How to Add Template Columns*.
9. Click **Submit**. The Edit Columns page appears.

How to Delete a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the name of the template you want to delete. The Edit Export Template page appears.
7. Click **Delete**.
8. Click **Confirm Delete**. The Selection Deleted page appears.

How to Delete Template Columns

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**. Additionally, the Templates for Exporting page is now also accessible via **Start > System > Page and Data Management > Templates for Exporting**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.

3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. Click **Template**. The Templates for Exporting page appears.
6. Click the # Columns link of the template to be changed. The Edit Columns page appears.
7. Click the Title of the column you want to delete. The Edit Column page appears.
8. Click **Delete**.
9. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export Using a Template

Note: The Export Using Template page is now also accessible via **Start > System > Page and Data Management > Export Using Template**.

1. On the start page, search for and select a group of students. A list of students appears in the Current Student Selection section. For more information, see *Select a Group of Students*.
2. Click the **[Select Function]** arrow. The Group Functions pop-up menu appears.
3. Under Export, choose **Export Using Template**. The Export Using Template page appears.

   Note: Alternatively, if you have a current selection of students, you can choose **Special Functions** under Functions in the main menu and then click **Groups Functions**.

4. Choose the type of export from the **Type of Export** pop-up menu. The Export Using Template page appears.
5. 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.

6. Click **Submit**. The results of the export appear.
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.

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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. 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: • **Attendance** • **Courses** • **Sections** • **Student Schedules** • **Students** • **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.
Send Output to	Indicate the method by which you want to export the records to the other system from the pop-up menu. To use a local (or network shared file system to export the records to the other system: 1. Choose **Local (or network shared) File System**. To use the file transfer protocol (FTP) to export the records to the other system:

	1. Choose **Ad Hoc FTP Server**.
	2. Enter information in the following fields:
	    • **Use Passive Mode** - If your FTP has difficulty transferring, select the checkbox.
	    • **FTP host name**
	    • **FTP account name**
	    • **FTP password**
	    • **Timeout in seconds** - Indicates the number of second that PowerSchool will try to make the initial FTP connection with the remote system.
	
	To use a managed connection, such as SFTP, to export the records to the other system:
	
	1. Choose **Managed Connection.** A second pop-up menu appears.
	2. Choose a managed connection from the pop-up menu.
	
	Note: Managed Connections only appears in the pop-up if configured and download capability is enabled. See **System > System Settings > Plugin Management > Remote Connection Manager**.

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: • **Tab**

	• **Comma**
Record Delimiter	Use the pop-up menu to choose how records are separated in the export file: • **CRLF**: carriage return, line feed • **CR**: carriage return • **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: • **Send any attendance modified in the last 24 hours** • **Send attendance modified since last upload** • **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. • **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. **Note:** If you are adding database extension fields, enter the extension field name using the format [extension name].[fieldname].
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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click in the Name column the AutoSend record you want to edit. The AutoSend Record page appears.
4. Edit the information as needed. For field descriptions, see *How to Add an AutoSend Record*.
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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **AutoSend Setup**. The AutoSend Setup page appears.
3. Click in the Name column the AutoSend record you want to delete. The AutoSend Record page appears.
4. Click **Delete**.
5. Click **Confirm Delete**. The Selection Deleted page appears.

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** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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 signed 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 the *Enable PowerTeacher for a Selection of Teachers* section in the *PowerTeacher Gradebook Administrator Installation and Setup Guide* available on PowerSource.

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.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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:** Database extension tables can be selected on the **Current Table** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **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: • Click **Select all [number of] records in this table** to select all records and skip to Step 10.

	• 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 [Table Name]	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: • Equals (**=**) • Less than (**<**) • Greater than (**>**) • Less than or equal to (**<=**) • Greater than or equal to (**>=**) • Does not equal (**#**) • Contains (**contains**) • 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, which displays all fields and their values for the selected record.

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*.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
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:** Database extension tables can be selected on the **Current Table** pop-up. For more information, see *Database Extensions* in the *System Administrator User Guide* available on PowerSource. **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: • Click **Select all [number of] records in this table** to select all records and skip to Step 10. • 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 [Table Name]	Choose a field from the first pop-up menu. Choose an operator from the second pop-up menu: • Equals (**=**) • Less than (**<**) • Greater than (**>**) • Less than or equal to (**<=**) • Greater than or equal to (**>=**) • Does not equal (**#**) • Contains (**contains**) • 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

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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 Field	Enter the maximum number of characters each field in the table can display.
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.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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.

Note: The Direct Database Export (DDE) page is now also accessible via **Start > System > Page and Data Management > DDE**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, 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**. To include database extension fields from another table, manually enter [Table.ExtensionName] in brackets, followed by the field name. For example, to export fields from the Sections table and include alternate course number, enter **[Courses.CoursesCoreFields]Alt_Course_Number**.
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: • **Tab** • **Comma** • **None** • **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: • **CR**: Carriage return • **CRLF**: Carriage return and line feed • **LF**: Line feed • **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: • **<** (descending) • **>** (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.

Data Export Manager

Using the Data Export Manager, you can quickly and easily export data from PowerSchool tables, database extensions, and PowerSchool data sets into a text file.

PowerSchool Tables

Individual access to most PowerSchool tables is provided through Data Export Manager. Some tables have been removed for security reasons or because they are part of system processes.

Database Extensions

Database extensions allow you to display customized information in PowerSchool. Access to one-to-one, one-to-many, and independent database extensions is provide through Data Export Manager. Database extensions may be created through the PowerSchool user interface and define the table structure and related fields.

- Database extension tables are listed in the Export From pop-up menu on the Data Export Manager page using the name of the table.
- Database extension table fields are available in the Data Export Manager when selecting fields to export.
- After choosing a database extension table, the database extension table fields appear in a field list on the left side of the Data Export Manager page. The fields appear in the following order:
    - Each table lists its fields alphabetically after any primary and foreign keys.
    - If the selected database extension table is a 1-to-1 or a 1-to-many extension of a core table, the extension fields appear first, followed by the associated parent table and any of its extensions.
    - If the database extension table is an independent table that does not have a parent table, its fields appear first, followed by any of its extension fields.
    - A child table extension will list its fields and extensions first, followed by its parent table fields and extensions.
- Standard export options are available when exporting from a database extension table.
- Export results for an export from a database extension table are displayed in the downloaded export file.

For more information, see *Database Extensions*.

PowerSchool Data Sets

A PowerSchool data set is a data source that can be accessed via Data Export Manager, as well as the API. A typical PowerSchool data set declares a set of arguments, a set of columns, and a select statement. The arguments are optional, but the columns and select statement are required. A PowerSchool data set is pre-defined by PowerSchool and includes export modules for Course Archive, Incident, Student Email, Transportation, as well as data sets for Students + Courses and others.

Additional Data Sets

Additional data sets, also available through Data Export Manager, provide more specific access to data within PowerSchool. Additional data sets may be defined by PowerSchool or by a third-party as a PowerQuery, and installed in PowerSchool via the Plugin Package. Once the plugin is installed and enabled, the third-party data set becomes accessible as another resource in PowerSchool.

Note: PowerQueries may be created for a specific function within PowerSchool and may not necessarily be designed for use with the Data Export Manager. Consequently, unexpected behaviors may occur when used outside of their primary context.

Set Page-Level Permissions

To ensure that only authorized staff members access the mass data export pages, set page-level permissions for **Start Page > Special Functions** under **Functions** in the main menu **> Importing & Exporting > Data Export Manager** under Exporting. For more information about setting page-level permissions, see *Security Permissions*.

Export/Edit Settings

Using the Export/Edit tab on the Edit User Access Roles page, you can define which data sources a user can export and/or edit. These access levels only apply to exporting, previewing and editing via the Data Export Manager.

Note: For more information, see *User Access Roles*.

How to Define Export/Edit Settings

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Security, click **Roles Administration**. The Roles Administration page appears.
3. Click **User Access**. The User Access Roles page appears.

4. Click the name of the role you want to edit. The Edit User Access Role page appears.
5. Click the **Export/Edit** tab.
6. Use the following table to enter information in the Settings section:

Field	Description
Default Access Level	Select the **Export** checkbox to permit users assigned to this role to export content from any data source set to use the default settings. Select the **Edit** checkbox to permit users assigned to this role to edit content from any extensions set to use the default settings. **Note:** The **Edit** checkbox only displays for database extensions since the Data Export Manager only allows for editing of those fields.
User can set up and run scheduled system templates	Select the checkbox to permit users assigned to this role to set up and run scheduled templates.

7. Use the following table to enter information in the Filter section:

   Note: Click the **Filter** arrow to collapse this section. Click the **Filter** arrow again to expand this section.

Field	Description
Data Source Name	The data source from which data is derived. To narrow the list of data sources by data source name: 1. Click the **Add (+)** button. 2. Choose **Data Source Name** from the first pop-up menu. 3. Enter the data source name or a portion of the name. 4. Click **Apply**.
Parent Name	To narrow the list of data sources by parent name: 1. Click the **Add (+)** button.

	2. Choose **Parent Name** from the first pop-up menu. 3. Enter the parent name or a portion of the name. 4. Click **Apply**. **Note:** Parent column contents vary by data source type. For extensions, it displays the name of the table that is extended. For tables, it displays its own name. For data sets, it appears blank.
Type	To narrow the list of data sources by data set type: 1. Click the **Add (+)** button. 2. Choose **Type** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **Table** • **Data Set** • **Extension** 4. Click **Apply**.
Category	To narrow the list of data sources by category: 1. Click the **Add (+)** button. 2. Choose **Category** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • [No Category] • [Any of the functional-based categories] 4. Click **Apply**.
Use Defaults	To modify this filter: 1. Click the **Add (+)** button. 2. Choose **Use Defaults** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • Choose **Data Sources using the default setting**. • Choose **Data Sources *not* using the default setting**.

	4. Click **Apply**. **Note:** By default, this filter is set to **Data Sources *not* using the default setting**.
Export	To narrow the list of data sources by whether or not the **Export** checkbox is selected: 1. Click the **Add (+)** button. 2. Choose **Export** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **True** • **False** 4. Click **Apply**.
Edit	To narrow the list of data sources by whether or not the **Edit** checkbox is selected: 1. Click the **Add (+)** button. 2. Choose **Edit** from the first pop-up menu. 3. Choose one of the following from the second pop-up menu: • **True** • **False** 4. Click **Apply**.

Note: To delete the filter, click the **Minus (-)** button next to the filter. To remove all filter selections, click **Clear**.

8. Use the following table to view search results:

   Note: Click the name of a column to sort by that column in ascending order. Click again to sort in descending order.

Field	Description
Data Source Name	The data source name appears.

	If the data source is a PowerQuery, it appears as a link. Users must have access to all required tables within the data set in order for the data set to be available in the Data Export Manager. 1. Click the data set name to see its table dependency information. The [Data Set] drawer opens. 2. Click **Apply** to grant this role access to the data set and all tables listed. The [Data Set] drawer closes.
Parent Name	The parent name appears.
Type	The type appears.
Category	The category appears.
Use Defaults	Do one of the following: • Select the checkbox in the header row to select the **Use Defaults** checkbox for all filtered data sources. • Deselect the checkbox in the header row to deselect the **Use Defaults** checkbox for all filtered data sources. • Select the checkbox to use the role's default export and edit settings for a data source. • Deselect the checkbox to use the data source specific export and edit settings.
Export	Do one of the following: • Select the checkbox in the header row to permit exporting of all filtered data sources. • Deselect the checkbox in the header row to prohibit exporting of all filtered data sources. • Select the checkbox next to a specific data source to explicitly permit exporting of the specific data source. • Deselect the checkbox next to a specific data source to explicitly prohibit exporting of the specific data source.

Edit	Do one of the following: • Select the checkbox in the header row to permit editing of all filtered data sources. • Deselect the checkbox in the header row to prohibit editing of all filtered data sources. • Select the checkbox next to a specific data source to explicitly permit editing of the specific data source. • Deselect the checkbox next to a specific data source to explicitly prohibit editing of the specific data source. **Note:** If this checkbox next to a specific data source is selected/deselect, the **Export** checkbox is automatically selected/deselected as well. **Note:** This checkbox only applies to editing extensions.
[Pagination]	Use to navigate the search results.
Rows/Page	By default, ten records display per page. To view more records per page, enter the appropriate number in the field.

9. Click **Save**. A confirmation message appears.

   Note: Changes are also saved for fields that may no longer be visible with the current filter.

How to View Data Export Manager Information for Assigned Roles

1. On the start page, search for and select a staff member. For more information, see *Staff Search*.
2. On the Staff page, click **Security Settings** from the staff pages menu. The Security Settings page appears.
3. Click the **Admin Access and Roles** tab.
4. Click the [Information Icon] next to the role for which you want to view Data Export Manager information. Data Export Manager information appears, including the default level followed by the data sources users assigned to this role can edit and/or export.
5. When done viewing, click **OK** to close the pop-up.

Export Data Using the Data Export Manager

This procedure may be performed for a selected school or at the district level. This procedure may be performed for a student selection or teacher selection depending on your **Export From** selection. For more information about selecting students, see *Student Search*. For more information about selecting staff, see *Staff Search*.

Note: The Data Export Manager page is also accessible via **Start > System > Page and Data Management > Data Export Manager**.

How to Export Data Using the Data Export Manager

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.

   Note: The Export tab appears selected by default.

4. Use the following table to enter information in the Select Columns to Export section:

   Note: Information display based on your security permissions.

Field	Description
Category	Choose the category that contains the data you want to export from the pop-up menu: • **Tables** displays top 20 PowerSchool tables followed by most other PowerSchool tables. • **Database Extensions** displays database extensions. • **PowerSchool Data Sets** displays approved data sets and any preexisting or new export modules. • **Additional Data Sets** displays all other data sets and third-party PowerQueries. • **Show All** displays all of the above. • **[Functional Categories]**, displays any functional categories within PowerSchool that have display names, such as Attendance, Grading, or Scheduling.

<table>
<tr><td></td><td>[Uncategorized] displays any functional categories within PowerSchool that do not have display names.</td></tr>
<tr><td>Export From</td><td> Choose the data source that contains the data you want to export from the pop-up menu. Note: Only data sources for which you have export access to all required tables and fields will be available for selection. If a data set appears shaded and cannot be selected, you do not have field level access to one or more fields used in that data set. Note: Descriptions have been defined for many of the mass data modules and can be further customized to provide more detailed instructions. To view a list of descriptions: On the start page, choose System under Setup in the main menu. The System Administrator page appears.
Under Data Management, click Page and Data Management. The Page and Data Management page appears.
Under Localization, click Localize PowerSchool. The Localize PowerSchool page appears.
Click the Data tab.
Choose PowerSchool Customer Defined Data from the Choose the functional area or item you want to translate pop-up menu.
Choose Mass Data Module from the Category pop-up.
Click Retrieve Text. Descriptions for the mass data module appear in the Text for translation section. For more information, see Localize Using Batch Mode. </td></tr>
<tr><td>Select All</td><td> If the data set contains more than one table or other entity, this checkbox appears. Do one of the following: To export all fields from all tables or entities within the data set, select the checkbox. Note all the checkboxes appear selected.</td></tr>
</table>

	To remove all fields from all tables or entities within the data set, deselect the checkbox. Note all the checkboxes appear deselected.
[Data Source]	After choosing the data source, the available fields appear in a field list on the left side of the page. **Note:** Click the arrow to collapse a section. Click the arrow again to expand a section. Do one of the following: - To export all fields within a section, select the checkbox by the table or section name. Note all the checkboxes appear selected. - To remove all fields within a section, deselect checkbox by the table or section name. Note all the checkboxes appear deselected. - To export only certain fields within the data set, select the field checkboxes. - To remove a field, deselect the checkbox next to the appropriate field. **Note:** You can also remove a field by clicking the minus (-) button that appears on the right side of the page next to the field.
Sort	If the data set contains only one table or entity, the selected fields are sorted based on the order that the fields were selected. To modify the order of fields, use the up and down arrows to move fields. If the data set contains more than one table or entity, the selected fields are sorted based on the hierarchy of the parent, child, and sibling fields that were selected. Note the title above entity groupings. To modify the order of fields, use the up and down arrows to move fields. Fields within an entity can only be sorted within that entity. As such, some up and down arrows may be disabled to prevent invalid sorting.
Field	The internal PowerSchool field name as it appears in the data set.

Label Used on Export	Enter the name you want to appear for the field in the export file. **Note:** This field is populated with the field name from the data set. This field cannot be left blank.
Remove	Click to remove a field.

5. Click **Next**.
6. Use the following tables to review information in the Select Records to Export from [Data Source] section:

   Note: Information displays based on your security permissions.

Field	Description
Built In Filters	Click the arrow to expand this section. Click the arrow again to collapse this section. To narrow the list: 1. Enter information as needed. 2. Click **Apply**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**. **Note:** This section displays based on your **Export From** selection. If this section does not appear, there are no built in filters for your selection.
Column Filters	Click the arrow to expand this section. Click the arrow again to collapse this section. To narrow the list: 1. Choose the column by which you want to filter records from the **Filter by** pop-up menu. 2. Select a comparator from the **Value** pop-up menu. 3. Enter search criteria in the **Value** field. 4. To add another filter, click **+** and repeat Step 1. 5. To delete a filter, click **-** next the filter.

	6. Optionally, click **Show Records**. The page refreshes and display filtered results. **Note:** To remove all filter selections, click **Clear**. **Note:** This section displays based on your selected data set. If this section does not appear, there are no column filters for the data set. **Note:** Some fields in your selected data set may not be available for filtering.
[Export Rows]	Select one of the following options: • **Export All Rows** to apply any Built In Filters. • **Export Filtered Rows** to apply Built In Filters and Column Filters.
Edit All Filtered Records	It is extremely important to note that you are making a permanent mass-change to data in the database when you use this feature. 1. Click **Show Records** in order for this button to appear. 2. Click to edit field data for multiple records. The Edit drawer appears. 3. To narrow the list, enter search criteria in the **Filter** field. 4. Select the field option and then enter data. 5. Click **Submit**. The Edit closes. **Note:** Only extensions from the originally selected database extension are editable. **Note:** This button does not appear if you have read-only access to the page.
Actions	1. Click the **Edit** icon to update field data. The Edit drawer appears. 2. Edit information at needed. 3. Click **Submit**. The Edit closes.

	Note: Only extensions from the originally selected database extension are editable. **Note:** This column does not appear if you have read-only access to the page.
[Data Source]	Fields to be exported. **Note:** Click column headings to sort in ascending order. Click again to sort in descending order.

7. Click **Next**.
8. Use the following table to enter information in the Export Summary and Output Options fields:

   Note: Information display based on your security permissions.

Field	Description
Export Summary | Records to Export	The number of records to be exported appears. **Note:** This number may differ from the record selection when the selected data set is from extended tables. If exporting from a standalone extended table, the total number of records displays regardless of students/teachers selection. If exporting from a 1-to-1 or 1-to-many extended table, the number of records that display depends on whether current student/teacher selection or all active students/teachers were selected.
Export Format | Export File Name	Enter the name of the export file. **Note:** Default is set to **[selected data source]_export.txt**. **Note:** Special characters in file names may not display properly depending on your operating system. For example, characters considered reserved by your operating system or file names with leading or trailing periods.
Export Format | Line Delimiter	Use the pop-up menu to choose which delimiter to use to separate the lines of data in the export file: • **CR**: Carriage return (default)

	• **CRLF**: Carriage return/line feed • **LF**: Line feed • **Other**: If selected, enter the type of end-of-line delimiter in the adjacent field, such as a semicolon. **Note:** Only one character may be entered. A double quote character is not allowed.
Export Format | Field Delimiter	Use the pop-up menu to choose which delimiter to use to separate the fields in the export file: • **Tab** (default) • **Comma** • **Other**: If selected, enter the field delimiter in the adjacent field. **Note:** Only one character may be entered. A double quote character is not allowed.
Export Format | Character Set	Use the pop-up menu to choose the character set for the export file. This selection is specific to the operating system where the import file was created: • **Windows ANSI** (Windows) • **Mac Roman** (Mac) • **ISO 8859-1** • **UTF-8** **Note:** Defaults to the appropriate character set based on the client operating system.
Export Options | Include Column Header	Do one of the following: • Select the checkbox if you want a header row to appear in the export file. • Deselect the checkbox if you do not want a header row to appear in the export file. **Note:** By default, the checkbox is selected.

	Note: Column headers are defined using the **Label** field in the Select Columns to Export section.
Export Options | Surround "Field Values" in Quotes	Do one of the following: • Select the checkbox if you want the exported field values to appear with quotes around them in the export file. • Deselect the checkbox if you do not want the exported field values to appear with quotes around them in the export file. **Note:** By default, the checkbox is not selected.

9. Use the following table to do one of the following:

Field	Description
Export	Click **Export**. Save and/or download the export file to your desktop (varies depending on your browser). **Note:** If using Excel to view an export file that includes fields containing characters that are being used as a record delimiter, content may not be parsed correctly. It is recommended that you use a text editor to view the export file.
Save Template	For detailed information, see Step 5 of *How to Create a Template*.

Managing My Templates

If you export the same data frequently, you can create a template so that you don't have to define the fields, filters and Export Options used every time you perform an export. Once you create a template, the template appears on the My Templates tab. From the My Templates tab, you can easily manage your templates.

Note: Your templates are unique to your account and can be used at any school that you can switch to.

Note: Exports are always run within your current school context. Be careful when saving School ID filters as part of a template as this will prevent the export from exporting data at other schools.

How to Create a Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Prepare the export as needed. All selected Fields, Filters, and Export Options will be saved with the template. For detailed information, see *How to Export Data Using the Data Export Manager*.
5. Click **Save Template**. The Save Export Template pop-up appears.
6. Enter the template name in the **Name** field.
7. Enter a description in the **Description** field.
8. Note the mapped fields that are included in the template.
9. Click **Save as New**. A confirmation message appears.

How to View Templates

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab displays the following information for each template:

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Use the following table to do one of the following:

Field	Description
Template	The name of the template. Click to load for export or editing.
Description	The description for the template.
Data Source	The data source from which the template is derived.
Actions	The actions that may be taken with the template. Use the **Schedule** icon to schedule the template for export. For more information, see *How to Schedule an Export*. Use the **Delete** icon to delete the template. For more information, see *How to Delete a Template*.

How to Apply a Template

Note: Current student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to apply. The Export tab appears.
6. To continue, see Step 4 of *How to Export Data Using the Data Export Manager*.

How to Create a Template from an Existing Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to use to create a new template. The Export tab appears.
6. Prepare the export as needed. For detailed information, see *How to Export Data Using the Data Export Manager*.
7. Click **Save Template**. The Save Export Template pop-up appears.
8. Enter the template name in the **Name** field.
9. Enter a description in the **Description** field.
10. Click **Save as New**. A confirmation message appears.

How to Edit a Template

Note: Student and staff selections are not saved with a template. If a specific set of student or staff is required for an export, use the column filters.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the name of the template you want to edit. The Export tab appears.
6. Prepare the export as needed. For detailed information, see *How to Export Data Using the Data Export Manager*.
7. Click **Save Template**. The Save Export Template pop-up appears.
8. Click **Save**. A confirmation message appears.

How to Delete a Template

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Delete** icon next to the template you want to delete.
6. Click the **Confirm Delete** icon. A confirmation message appears.

Managing Scheduled System Templates

Once a template is scheduled for export, it becomes a system template and is available for exporting data associated only within the school context it is created. System templates created at the district office will export data from all schools.

Data exported from System Templates do not have field level security restrictions. However, users who are permitted to set up and run scheduled system templates do not necessarily have access to the export destination. Security of the export destination is managed by its own security mechanisms, outside of PowerSchool.

How to Schedule a Template for Export

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **My Templates** tab. The My Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Schedule Template** icon next to the template you want to schedule for export. The Set Schedule drawer appears.

Note: This button only appears for users with a role permitted to edit scheduled system templates.

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

Field	Description
Schedule Active	By default, this checkbox is selected indicating PowerSchool is scheduled to automatically export a copy of the data. If you do not want PowerSchool to automatically export a copy of the data, deselect the checkbox.
Days to Execute	Select the checkbox next to each day of the week you want PowerSchool to automatically export a copy of the data: • **Mon** • **Tues** • **Wed** • **Thu** • **Fri** • **Sat** • **Sun**
When to Execute	Enter the hour and minutes you want PowerSchool to automatically export a copy of the data.
Send Output To	Choose the method by which you want to export a copy of the data from the pop-up menu: • **PowerSchool Folder** • **SFTP** **Note:** For more information about SFTP, see *Remote Connection Management*.
Path	Enter the path where you want the exported file saved.

	A relative path may be entered, such as /folder/subfolder. In which case, the file will be written to the given path relative to the PowerSchool data folder as defined by the PowerSchool Installer. An absolute path preceded by drive letter may also be entered, such as F:\exportdirectory\. Absolute paths may only refer to local drives in a single node environment or to network drives as defined by the PowerSchool Installer for multi-node environments.
Email Completion Report To	Enter the email addresses of the people you want to send a completion report to each time it exports this file. Separate multiple addresses with commas.

7. Click **Save**. A confirmation message appears. The scheduled template now appears on the Scheduled System Templates tab.

How to View Scheduled System Templates

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.
5. Use the following tables to view information in the fields:

Field	**Description**
Template	The name of the template scheduled for export. Click to load for export or editing. **Note:** When template is scheduled, the name of the template is appended with (copy).
Data Source	The data source from which the template is derived.

Status	Indicates whether or not the scheduled export is set active. For more information, see *Schedule Active*.
Last Run	Indicates one of the following: • The date and time the scheduled export completed. • The date and time the scheduled export failed. • The date and time the scheduled export began running.
Actions	The actions that may be taken with the scheduled export. Use the **Edit** icon to edit scheduled export options. For more information, see *How to Edit System Template Schedule Options*. Use the **Run Now** icon to run the scheduled export immediately. For more information, see *How to Run a Scheduled System Template*. Use the **Delete** icon to delete a scheduled export. For more information, see *How to Delete a Scheduled System Template*.

How to View Scheduled System Template Results

Once a scheduled export runs, navigate to where the exported file was saved (designated path) to view scheduled export results.

How to Edit System Template Schedule Options

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Edit** icon next to the template you want to edit. The Set Schedule drawer appears.
6. Edit as needed. For field descriptions, see *How to Schedule an Export*.
7. Click **Save**. A confirmation message appears.

How to Run a Scheduled System Template Immediately

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Run Now** icon next to the template you want to run. A confirmation message appears.
6. Navigate to where the exported file was saved (designated path) to view scheduled export results.

How to Delete a Scheduled System Template

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Click the **Scheduled System Templates** tab. The Scheduled System Templates tab appears.

   Note: Click column headings to sort templates in ascending order. Click again to sort in descending order.

5. Click the **Delete** icon next to the template you want to delete.
6. Click the **Confirm Delete** icon. A confirmation message appears.

Import and Export Standards

Using the PowerSchool import and export feature, you can manage standards more efficiently for your district.

There are three areas in which you can import and export standards into or out of PowerSchool. Each area provides specific information for managing standards.

- Standards: District List for importing and exporting general information and associations for standards.
- Standards: Course Weight for importing and exporting course weights for a parent standard or lower level standard.
- Standards: Final Grade By Class for importing and exporting standards final grades.

You can import your standards into PowerSchool and make them available for teachers to use in PowerTeacher Pro.

The Data Import Manager page is accessible via **Start > System > Page and Data Management > Data Import Manager**. You must have the correct security permissions and user roles in order to use this feature.

Standards: District List

Use the Standards: District List to mass update general standards information, such as the identifier, conversion scale, grade scale, or parent identifier.

How to Export Standards: District List

When updating standards, you can either use the Standards ID or the identifier and year. You can obtain the ID for each standard by exporting the Standards: District List first. You can use the export to add or change data and import it back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select P**owerSchool Data Sets** from the Category pop-up menu.
5. Select **Standards: District List** from the **Export From** pop-up menu. The Standards: District List available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.

- If you want to export the data to make changes and then import it back in to PowerSchool, select the **ID** field, as this may make the import a bit faster than using the identifier and year. If the ID, Identifier and Year are all in the import file, the import process will key off of the ID.
- If you want to use this export to create new grade scales and import them into PowerSchool to be used by PowerTeacher Pro, the following fields are required in the file:
  - **ID**
  - **Name**
  - **GradescaleItemDCID**
  - **ConversionScaleID**
  - **YearID**

7. Change the sort order and labels for the export as needed.
8. Click **Next**. The Select Columns to Export page appears.
9. Set the filter criteria, and then click **Show Records**. The data appears on the page.
10. Click the **Pencil** icon next to the record you want to edit. The Edit drawer appears.
11. Enter the changes for the record, and click **Submit** to close the Edit drawer.
12. Click **Next** on the Data Export Manager page.
13. Select the export output options, and then click **Export**.

How to Import Standards: District List

You can make additional changes as needed to the file prior to importing back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: District List** from the **Import Into** pop-up menu, and then select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.

   Note: The Longitudinal ID is a number used to link a standard from year to year. If you do not specify the Longitudinal ID in the import file, you have the option of retrieving the ID of the matching identifier from a previous year, or creating a new value.

10. Click **Import**.

Standards: Course Weights

To import course weights, you must have standards already created and associated to courses in PowerSchool.

In the Standards: Course Weights dataset, the Parent Weight is used when calculating a final traditional grade. Modifying this weight will impact final traditional grades.

Child Weight is rolled up to the Parent Weight in final standards grades.

How to Export Standards: Course Weights

You can export the Standards: Course Weights data set, make any necessary changes, and import the updated dataset back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select **PowerSchool Data Sets** from the **Category** pop-up menu.
5. Select **Standards: Course Weights** from the **Export From** pop-up menu. The Standards: Course Weights available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.
    - If you want to make changes to this dataset and import it back in to PowerSchool, the **YearID** field is required in the data import file when creating new course weights via import. Additionally, you can include a combination of the following fields in the import file:
        - **ParentCourse**
        - **ParentStandardID**
        - **StandardCourceAssocID**
7. Change the sort order and labels for the export as needed. You can only filter on certain Parent record fields.
8. Click **Next**. The Select Columns to Export page appears.
9. Set the filter criteria, and then click **Show Records**. The data appears on the page.

10. Click the **Pencil** icon next to the record you want to edit. The Edit drawer appears. You can only edit Parent weights using this feature.
11. Enter the changes for the record, and then click **Submit** to close the Edit drawer.
12. Click **Next** on the Data Export Manager page.
13. Select the export output options, and then click **Export**.

How to Import Standards: Course Weights

You can make additional changes as needed to the file prior to importing back in to PowerSchool.

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manager**. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: Course Weights** from the **Import Into** pop-up menu, and select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.
10. Click **Import**.

Standards: Final Grades By Class

Export a list of all standards final grades. This export allows you to choose if you want to use the current student selection to export final grades for a selection of students.

How to Export Standards: Final Grades By Class

1. On the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Under Data Export, click **Data Export Manager**. The Data Export Manager page appears.
4. Select **PowerSchool Data Sets** from the **Category** pop-up menu.

5. Select **Standards: Final Grades By Class** from the **Export From** pop-up menu. The Standards: Final Grades By Class available fields appear in a field list on the left side of the page.
6. Select the fields you want to export.
7. Change the sort order and labels for the export as needed.
8. Click **Next**. The Select Columns to Export page appears.
9. Select the **Use current student selection** checkbox to use your current student selection for the export. Select the **Year to include** from the pop-up menu. Additionally, you can filter on Standard Identifiers, Course Numbers, and StoreCodes. The export will only export standards grades for the schools for which you have security permissions enabled.
10. Click **Next.**
11. Select the export output options, and click **Export**.

How to Import Standards: Final Grades By Class

You can make changes as needed to the file prior to importing back in to PowerSchool.

1. O the start page, choose **Special Functions** under Functions in the main menu. The Special Functions page appears.
2. Click **Importing & Exporting**. The Importing & Exporting page appears.
3. Click **Data Import Manage**r. The Data Import Manager page appears.
4. Select the source file for the import.
5. Select **Standards: Final Grades By Class** from the **Import Into** pop-up menu, and select the **Field Delimiter** for the file.
6. Click **Next**.
7. Select the **PowerSchool Field** to map the information from the import file from the pop-up menu.
8. Click **Next**.
9. Select the import options for the file.
10. Click **Import**.