

# **Updating Existing Standards into PowerSchool**

#### **About this Document**

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This process explains how to update existing Standards in PowerSchool. First, standards that need updating must be EXPORTED (via Data Export Manager), manipulated in a third-party application (i.e. Excel), then re-imported using Data Import Manager.

#### Introduction

You will need to Export the Standards out using Data Export Manager. The minimum fields that require exporting is the ID,YearID – but you do need other fields that will help you identify which records you are looking at (i.e. Identifier, ParentIDentifier, Name, etc...) plus all the fields that you are wanting to update. Put that export file into a 3<sup>rd</sup> party application (like Excel) and update the fields you need to update (DON'T EDIT THE 'ID' FIELD). Save the edited file as a tab delimited text file and import into PowerSchool using Data Import Manager.

## Fields in the Standards Import File

All fields listed and how they are used (in alphabetic order by field name)

- **ConversionScaleID** in NC, use the default ScaleID = 399. The internal ID of the conversion scale associated with standards .... Required for PTPro but really is only used in PTG.
- **Description** full description of the standard. Can be more verbose than the name.
- **DisplayPosition** sort order within each level. Determines a non-alphabetical ordering. (How lower level standards roll up to higher level standards.)
- **GradeScaleItemDCID** the internal ID of the grade scale used with this standard. Required for all standards associated with sections that are using PTPro. Value can be found in LEA > Under Grading > GradeScales.
- **ID** This field is assigned to each standard as it gets imported for the first time. This field only needs to be used when existing standards need to be UPDATED. In order to find this field value, you will need to export records using Data Export Manager.
- **Identifier** the 'dot notation' for the standard. Unique identifier used for reporting and for designating assignments.
- IsActive 0 or 1. 0=not active, standard not currently used, 1=active.
- **IsAssignmentAllowed** 0 or 1. 0=standard NOT to be attached to assignments
- **IsCommentIncluded** 0 or 1. 1=standard can have comments attached (but not at the assignment level)
- **IsExcludedFromReports** 0 or 1. 1=standard IS excluded from all reports.
- LongitudinalID Only used if linking a standard to a standard from a previous year. When importing new standards, have the import process create a new longitudinal ID.

- MaxCommentLength 4000-character limit.
- Name Name of the standard for reporting purposes 400-character limit. No special characters (i.e. tab characters, 'enter', any kind of indentations like bullets, etc...)
- **ParentStandardIdentifier** the 'dot notation' of where current standard rolls up to (Hierarchical identifier of the owning standard).
- **PrimaryCourses** Aligns the standard to all sections of course numbers listed here. Multiple course numbers can be entered separated by commas with no spaces.
- **SubjectArea** Used for reporting and filtering purposes.
- YearID A two-digit number that associates the standard with the year it is active.

(i.e. 
$$17-18 = 27$$
,  $18-19 = 28$ )

#### Required Fields for the Import

- ID
- YearID

#### Optional Fields

- ConversionScaleID
- Description
- DisplayPosition
- GradeScaleItemID
- Identifier
- IsActive
- IsAssignmentAllowed
- IsCommentIncluded
- IsExcludedFromReports
- LongitudinalID
- MaxCommentLength
- Name
- ParentStandardIdentifier
- PrimaryCourses
- SubjectArea

### **Update/Import Process**

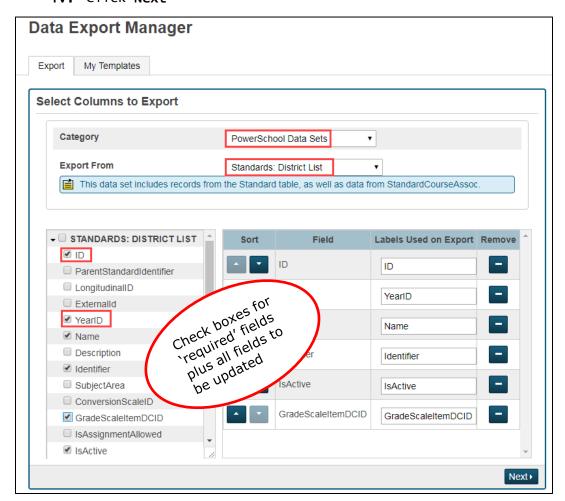
Exporting records first using Data Export Manager. Editing records in a 3<sup>rd</sup> party application, then re-importing into PowerSchool using Data Import Manager

1. Export records from PowerSchool

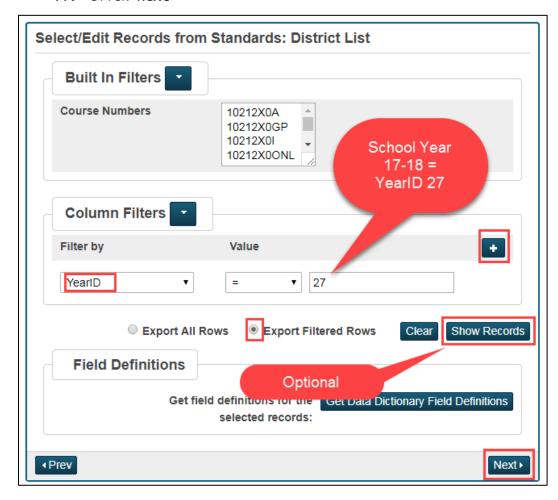
**Navigation:** LEA level > System > Page and Data Management > Data Export Manager

*Note:* Can only do this if security roles / permissions allow

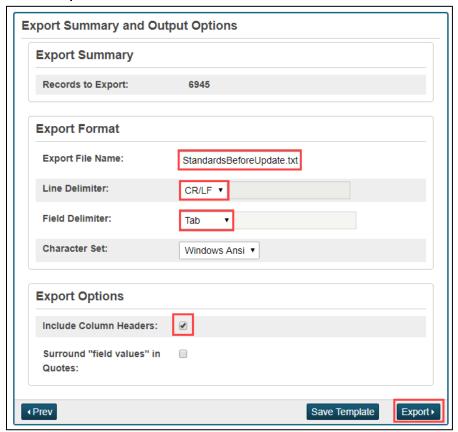
- a. In the Select Columns to Export box:
  - i. Category Select PowerSchool DataSets from dropdown list
  - ii. Export From Select Standards: District List from dropdown
    list
  - iii. Check the names of all the 'required' fields as well as fields you are wanting to export (including fields to be updated and fields that help you identify those records)
  - iv. Click Next



- b. In the Select/Edit Records from Standards: District List box:
  - i. In the Column Filters panel
    - 1. Filter by YearID (YearID = The [two digit] YearID of
       the standards you wish to update).... filter further
       if you don't want to update all the current year
       standards)
      - Click + sign to add more filters as desired
    - 2. Ensure radio button Export Filtered Rows is selected
    - 3. This is optional Click Show Records button
  - ii. Click Next



- c. Export File Name: Enter filename ... include .txt as the suffix
- d. Line Delimiter: Select CR/LF from the dropdown list
- e. Field Delmiter: Select Tab from the dropdown list
- f. Character Set: leave as-is
- g. Check Include Column Headers box
- h. Click Export

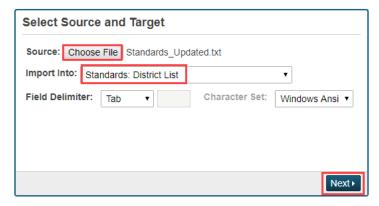


- Open the exported file and update the fields as needed. (DON'T EDIT THE ID FIELD or the YEARID FIELD)
  - a. Save the edited file as a tab-delimited text file and give it a different name something like 'Standards\_Updated'

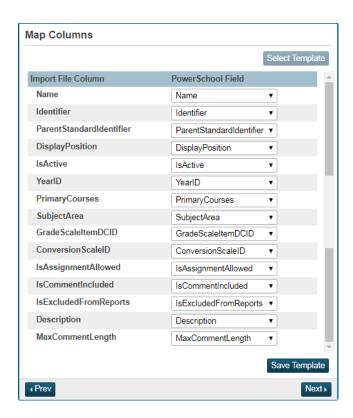
3. Navigate to Data Import Manager

**Navigation:** System > Page and Data Management > Data Import Manager

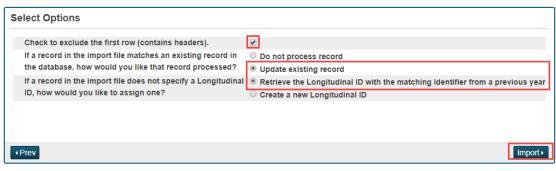
- a. In Select Source and Target box:
  - i. Click Choose File button and select your updated Tabdelimited Text file
  - ii. Import Into: select Standards: District List from dropdown
    list
  - iii. Field Delimiter: select Tab from dropdown list
  - iv. Character Set: leave as-is
  - v. Click Next



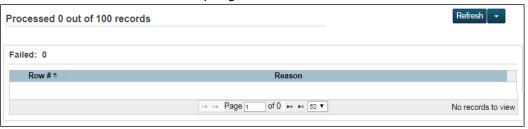
- b. Make sure all columns are mapped to the correct field
- c. Click Next



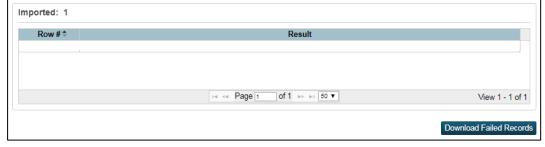
- d. Check the box to 'exclude the first row'
- e. Select radio button for 'Update existing record'
- f. Select radio button for 'Retrieve the Longitudinal ID with the matching Identifier from a previous year'
- g. Click Import



h. Wait for the import to complete, or click Refresh at regular intervals to monitor the progress



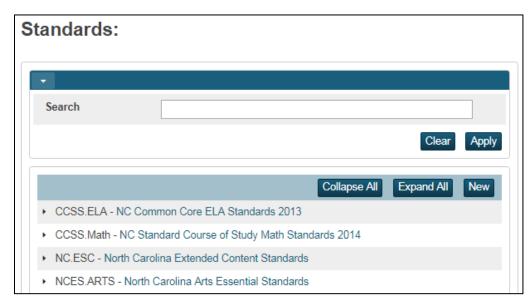
i. If any records failed to import, click **Download Failed Records** and correct them before importing again.



### **View Standards in PowerSchool After the Import**

See the list of standards from the LEA level after the import is complete

**Navigation:** LEA > Under Grading > Standards > List Standards



You can enter an identifier, parent identifier or any portion of the name of the standard to see a subset of all imported standards

Clicking the triangle next to the name of the content area standards will expand just that subset

Clicking on any of the blue links opens an edit box and displays the fields associated with that body of content (i.e. subject area, Grade Scale, Conversion Scale, Longitudinal ID, etc....)

**Note:** The fields in that edit box are editable. Not all changes need to be handled via the import process.