

PSUG National Information Exchange

Users Helping Users



Student Contacts – Deep Dive

ROGER SPRIK

VALLEY CHRISTIAN SCHOOLS

TECHNOLOGY DIRECTOR



Agenda

- Resources
- Using Contacts
- Migration Details
- Schema
- Two-way sync
- Reporting
- Importing
- Customization
- Implementation Strategies
- Hide Student Contacts Plugin



About the trainer. . .

- Roger Sprik,
Technology Director
rsprik@vcschools.org
- Valley Christian Schools, Cerritos Ca
- 1200+ students Preschool - 12
- PowerSchool since 2003



Resources



Resources

- What's new in PowerSchool 12
 - Presentation by Jason Springel (Exchange ID 901)
 - <https://support.powerschool.com/exchange/view.action?download.id=901>
- Other Springel resources
 - Enterprise report (897)
 - Object Report (907)
 - PTP Student Contacts view (917)
 - Contact Info DAT cheat sheet (927)
 - Restore Parent Links (901)



Resources cont...

- Roger resources
 - Hide Student contacts plugin (920)
- PowerSource
 - Student Contacts Field Mapping Guide (KB 79832)
 - Main Student Contacts Page (KB 9508)
- Other resources
 - psugcal.org



Using Contacts



Finding Contacts

- Contacts Search
 - Defaults to searching for Data Access only
- Student Contacts Screen
 - Security access enabled during migration if Demographics was enabled for the group



Migration



Migration

- Up to 6 from demographics
 - Note how more than one phone number is displayed
 - Contacts may have blank name if other data was present in legacy fields, usually guardian
 - No apparent way to prevent old records from migrating (not set as inactive)



Migration

- Up to 6 from demographics
 - Students will also be added to the Person table, but with no association record
 - "Behind the scenes", preparation for more functionality later
 - Relationship types and other codesets
 - Whatever is in your data will be added during migration
 - Watch for plugin from Jim Parsons



- ✓ Aunt
- Brother
- Father
- Friend
- Grandfather
- Grandmother
- Mother
- Neighbor
- Other
- Sister

Uncle

- stepmother
- Scoutmaster
- Maya's aunt
- Grandfather
- aunte
- Grandma
- Family Friend
- Grandpa
- mom
- mom's boyfriend
- Step dad
- Parent
- Co-Parent
- Close Friend
- Maternal Grandmother
- Grandparent
- dad
- mom #1
- family friend lives in sf

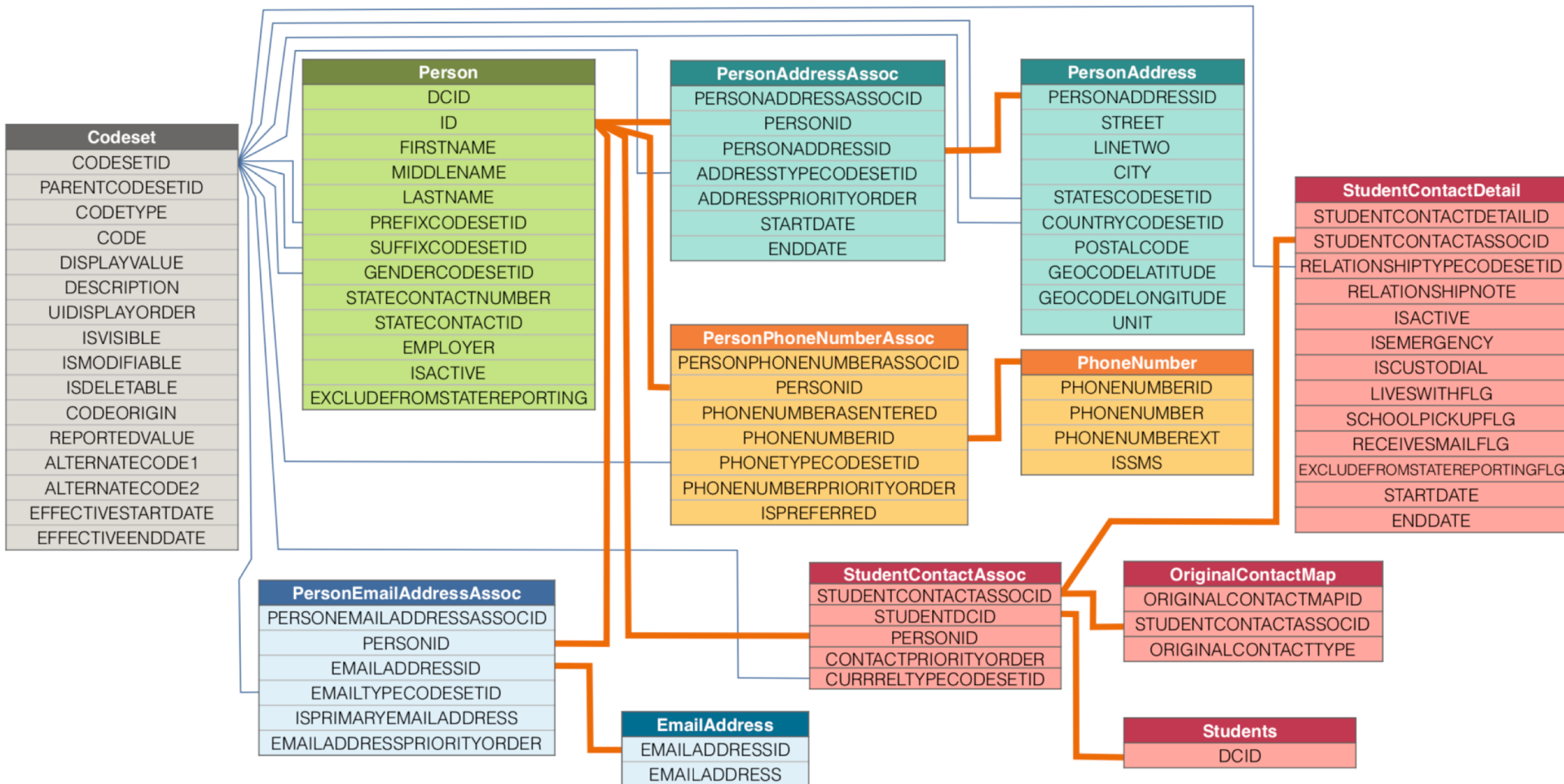
Migrated relationships



Schema



Schema – very helpful for queries



Two-way Sync



Two-way sync

- Makes changes both ways
 - Parent name, phone number, etc
- “Reason for name change” workflow
 - If additional data in Contact and legacy is changed
- Deletes also sync!
- Disassociating a contact from legacy data also clears out the legacy data
 - Filling in new data creates a new contact record



Adding individually

Live Demo



Reporting



Reporting

- Install Jason Springel's Object Report for examples
- Bug
 - Type= parameter in DAT not working properly



Importing



Importing

- Sprik Example
- Brady Bunch example



Customization



Customization

- Not hard to add extended field, difficult to display
 - Framework on the way



Strategies for Migration



Strategies for migration

- If you install 12, the migration WILL happen
- Options
 - Wait to go to 12
 - Upgrade to 12, ignore for now, cleanup later
 - Note difficulty in mass-selecting non-data access contacts to mass delete
 - Cleanup, re-import after upgrading to 12
 - 3rd party solutions?



Migrate and ignore?

- Hide Student Contacts Plugin



Real-world experience

- TRC Educational Services
 - Shannon Cochran
 - www.trceducationalservices.com



