

PSUG National Information Exchange

Users Helping Users



Importing/Exporting w/ Data Export Manager

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About the trainer. . .

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- Valley Christian Schools, Cerritos CA
- 1300+ students Preschool - 12
- PowerSchool since 2003 K-8, 2005 9-12



Resource

- PowerSource Article 77187
 - Import and Export User Guide for PowerSchool 10.x
 - <https://support.powerschool.com/article/77187>

Covers all of Importing and Exporting, but includes key sections on the newer Data Import Manager (DIM) and Data Export Manager (DEM)



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DIM vs Quick Import

- Quick import is the legacy importing tool.
 - Legacy tables
 - Can import 1:1 extended fields
- Data Import Manager is the new tool
 - Course Archive
 - Incident
 - Student Email
 - Transportation
 - Custom Tables
 - More to come...



Student Email Example

- File with student number and email address



Custom Table Example

- Valley example with Family Service Hour data



Deleting Custom Table Data

- Use Export Manager export the records and ALL columns you want to delete.
- Edit the file in excel and remove all the data, except ID. So you end up with ids down the left, cols across the top and null for all the column data.
- Then Import Manager select the import file, map the fields and then click the checkbox that says "Check to confirm that records should be deleted if blank rows exist in the import file. All columns in a table must be present in the import file.



Other imports

- Incidents
 - See pages 36-47
- Standards
 - Especially with the new changes to standards, importing them has become more complex
 - See pages 105-109



Tips

- Import Templates - useful if you import a set of data frequently. Templates are saved for the USER and only accessible by that user.
- Remember to map to student_number and choose the update option when importing student emails.



Data Export Manager

- See pages 82-104
- Like the DIM, DEM is the new tool moving forward. It promises to be a good improvement over Auto-Send.
 - Especially useful for exporting custom data
 - Also good for special data sets
 - Course Archive, Incident, Student Email, Transportation, as well as data sets for Students + Courses and others.
- If you can master SQL-based PowerQueries, it is especially useful.



Data Export Manager

- Security
 - Page Permissions
 - New roles (were automatically assigned to users based on their prior access)
 - You can get VERY detailed with Data Export Access permissions
 - See pages 83-88



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Data Export Manager

- Editing Database Extension Records
 - You can also edit database extension records
 - When exporting choose “Show Records” and if edit access for this data is enabled, you can edit individual rows or “Edit All Filtered Records”



Templates

- The user can save export templates for themselves.
- Unfortunately, they cannot be shared.



Scheduled Templates

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PowerQueries

- See “PowerQueries and Data Export Manager” presentation by my colleague James Parsons.
- Official support site
 - support.powerschool.com/developer
- PowerQueries for use with DEM:
 - Should NOT have arguments
 - Do NOT require an access_request section
 - DO require a permissions_mapping file



PowerQueries

- Valley's "Apple School Manager" example.
 - Six queries
 - See "ASM_1_0.zip"
- In DEM PowerQueries show up in "Additional Data Sets" in the "NQ - ..." section.
 - NQ = "Named Query" (the original name for PowerQuery)



