Discovery Data Export for PowerSchool Version 2.1.2

Installation and User Guide

Revised: Nov 23, 2010

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Chapter 1 − Preparing PowerSchool

Removing Previous Versions of the Discovery Software Export Reports

If you are upgrading from a previous version of the Discovery Software Export for PowerSchool, you will need to remove the previous version's reports before installing the new version's reports. To remove the reports:

1. On the main page of PowerSchool, from the Functions menu on the left side, click the **Reports** link.
2. On the Reports page, click the **Engine** link. (may be Reporting Engine in previous versions)
3. On the Reports (Reporting Engine) page, under the Function heading, click the **Setup** link.
4. On the Reports Setups page, for each report with a Report ID that is, or starts with PP_, do the following:
    a. Click the link for the report id.
    b. On the Edit Report Setup page, scroll down to the bottom of the page, and click the delete button.
    c. On the resulting page, click the back button.

Installing the Discovery Software Export Reports

In order for PowerSchool to extract the data files needed by Connect, you must first install the Discovery Software Export Reports into your copy of PowerSchool. The Discovery Software Export Reports are supplied as part of the PowerSchool package. To install the reports:

1. Unzip the archive that contains these instructions to a temporary folder on your computer.
2. Log into PowerSchool as an administrator.
3. Use the Load One Local Report function to upload each of the .rpt files from the temporary folder you created in Step 1:
    a. Under Functions on the main page, left hand menu, choose **Reports**.
    b. Choose **Engine** (Reporting Engine in older versions) from the options that appear.
    c. Choose **Load One Local Report** from the function menu.
    d. In the pane that appears, click Browse to locate the folder you created in step 1.
    e. Double-click the first .rpt file to select it.
    f. Click **Import** to install the report into PowerSchool. You should receive a message "The report was imported correctly." Click **Back**.
    g. Repeat steps d to f for each .rpt file in the folder.

Chapter 2 – Transferring Data from PowerSchool to Connect

Running the Discovery Software Export from PowerSchool

Now that the reports are installed, you can run the export report any time you wish to update your data.

To run the Principalm export from PowerSchool:

1. Log into PowerSchool as a normal user.

2. Use the Reporting Engine to generate the report:

    a. Under Functions on the main page, left hand menu, choose **Reports**.

    b. Choose **Engine** (or Reporting Engine) from the options that appear.

    c. Choose **Principalm Export** under the Run Report heading.

    d. In the configuration window that appears, under **Processing Options** select **Run in Background Now**.

    e. Enter the date you wish to run the report "As-of" in the Export Principalm data as of text box.

    f. If you plan on exporting attendance, enter the excused, unexcused, and tardy attendance codes you use into the three text boxes provided.

    g. If your school or district is setup to store a student's parking spot and/or license plate number, enter the name of the database fields used to store this information into the Custom Field Name text boxes provided.

    h. If you wish to export unused terms, un-check the Do not export unused terms checkbox.

    i. Click **Submit**.

    j. The report will run in the background. To check the status of the report select the icon to the left of the logout button (looks like a piece of paper with one side folded down).

    k. When the Principalm Export report has finished it will say Completed under the Status column. Click **View**.

    l. You will receive a message that PrincipalmExport.pde will be saved to your computer. Click Save File and choose a location if necessary. If you change the name, be sure to keep the extension as .pde.

3. Use the Reporting Engine to generate the attendance report:

    a. Under Functions on the main page, left hand menu, choose **Reports**.

    b. Choose **Engine** (or Reporting Engine) from the options that appear.

    c. Choose **Principalm Attendance Export** under the Run Report heading.

    d. In the configuration window that appears, under **Processing Options** select **Run in Background Now**.

    e. Enter the date you wish to run the report "As-of" in the **Export Principalm data as of** text box, and check the "As-of" box.

    f. Enter the excused, unexcused, and tardy attendance codes you use into the three text boxes provided.

    g. Click Submit.

    h. The report will run in the background. To check the status of the report select the icon to the left of the logout button (looks like a piece of paper with one side folded down).

    i. When the Principalm Attendance Export report has finished it will say Completed under the Status column. Click **View**.

j.   You will receive a message that PrincipalmAttendanceExport.pef will be saved to your computer. Click Save File and choose a location if necessary. You must not change the name of this file.

Import files using Connect

Follow the instructions in the Connect User Guide to import the .pde file(s) created in step 2-h above using Connect.

Chapter 3 – Customizing PowerSchool Export

PowerSchool is an extremely customizable system, so it is literally impossible for the standard Connect export to anticipate all of the export needs you may have. Fortunately, Connect's import is also highly customizable. If you need some assistance having data appear as you would like to see it please contact our support department at: support@discoverysoftware.com

Discovery Software also provides customization work on PowerSchool for a fee. If you are interested in contracting Discovery Software for customization of your PowerSchool installation, please contact our sales department:

Discovery Software Sales
Email: sales@discoverysoftware.com
Toll Free: 1-888-569-7711 ext. 1

Chapter 4 – Uninstalling the Discovery Software Export for PowerSchool

Uninstalling the Export Reports from PowerSchool

To remove the export reports:

1. On the main page of PowerSchool, from the Functions menu on the left side, click the Reports link.

2. On the Reports page, click the Reporting Engine link.

3. On the Reporting Engine page, under the Function heading, click the Setup link.

4. On the Reports Setups page, for each report with a Report ID that is, or starts with PP_, do the following:

   a. Click the link for the report id.

   b. On the Edit Report Setup page, scroll down to the bottom of the page, and click the delete button.

   c. On the resulting page, click the back button.