

Federal Updater Tool - Add/Update the Instruction Mode for Students (Massachusetts)

Last Modified on 06/10/2024 9:44 am CDT

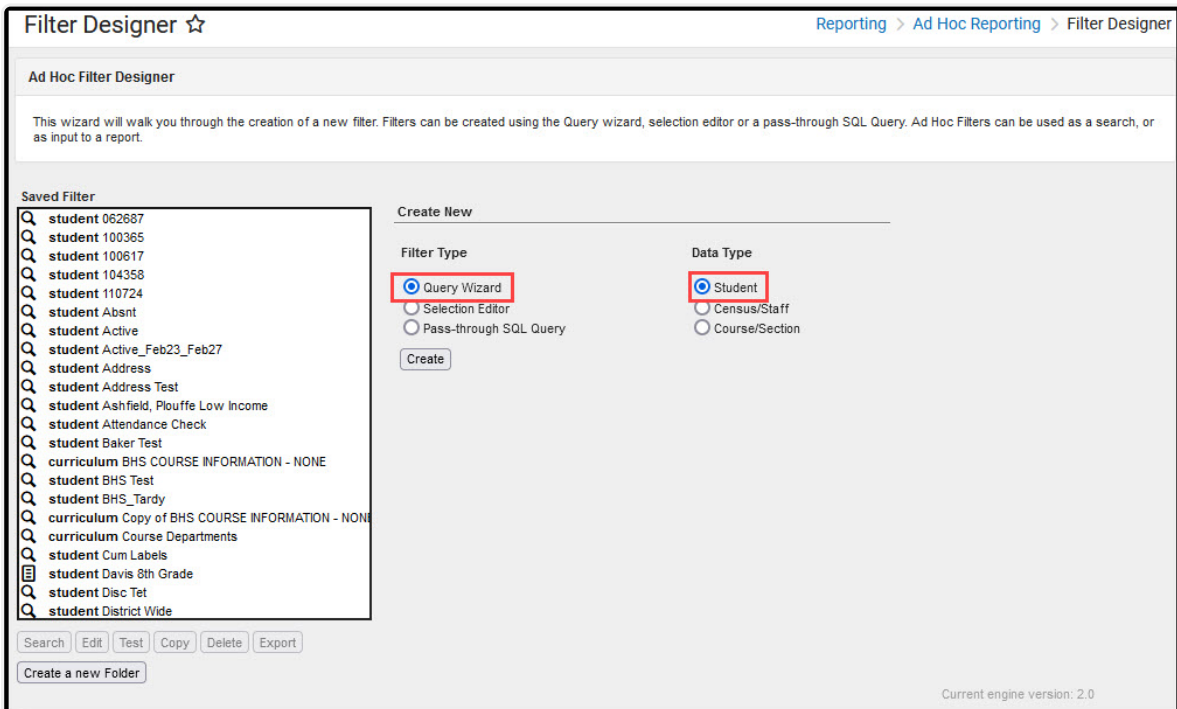
This article will walk you through the process of updating and adding a new Instruction Mode for a large set of students.

Currently, this document only covers how to do this process using the Import File option of the Federal/State Program Update Tool.

Additional information using the Add Participation/Delete Participation/Edit Participation options is forthcoming.

Adding and Updating the Instruction Mode for Students En Masse

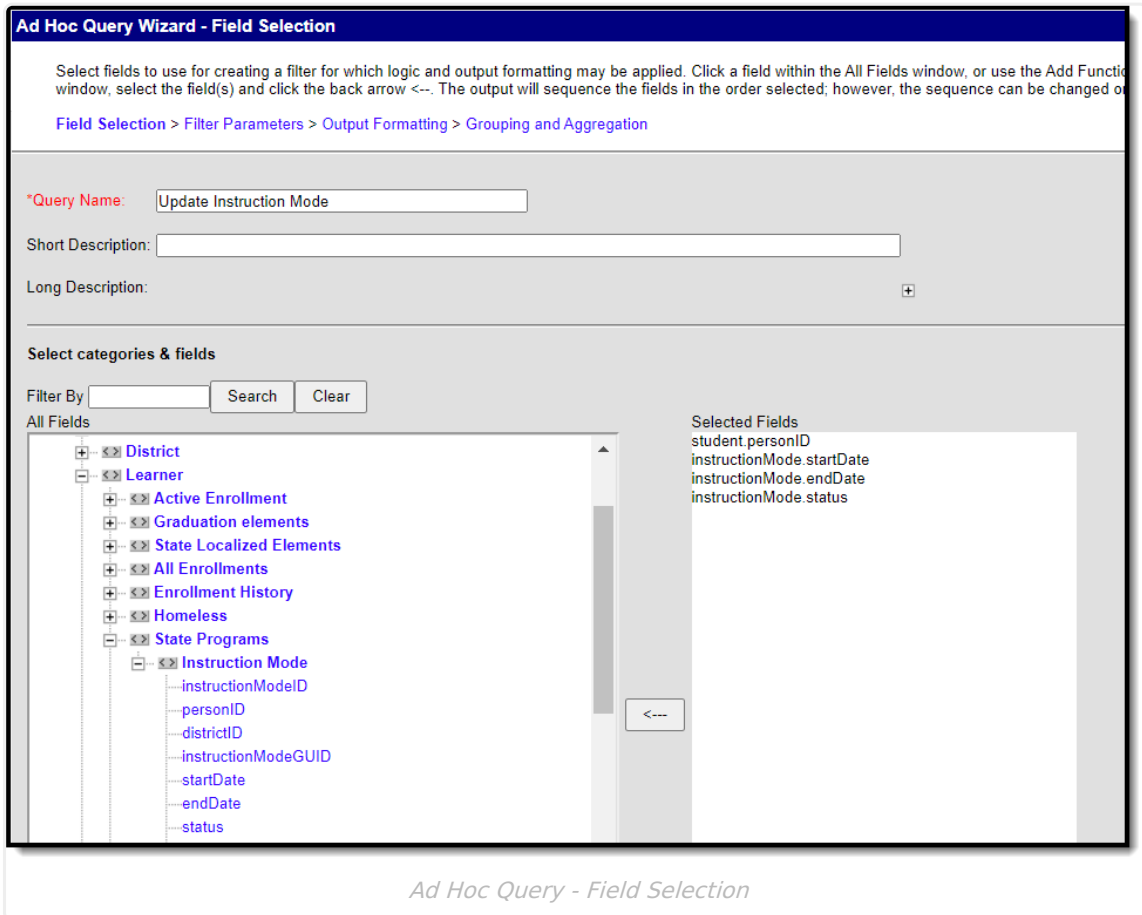
1. The first step in this process is to create an Ad hoc filter. Navigate to the [Filter Designer](#) tool (Ad Hoc Reporting > Filter Designer).
2. Select a **Filter Type** of *Query Wizard*, a **Data Type** of *Student*, and click the **Create** button.



Filter Designer

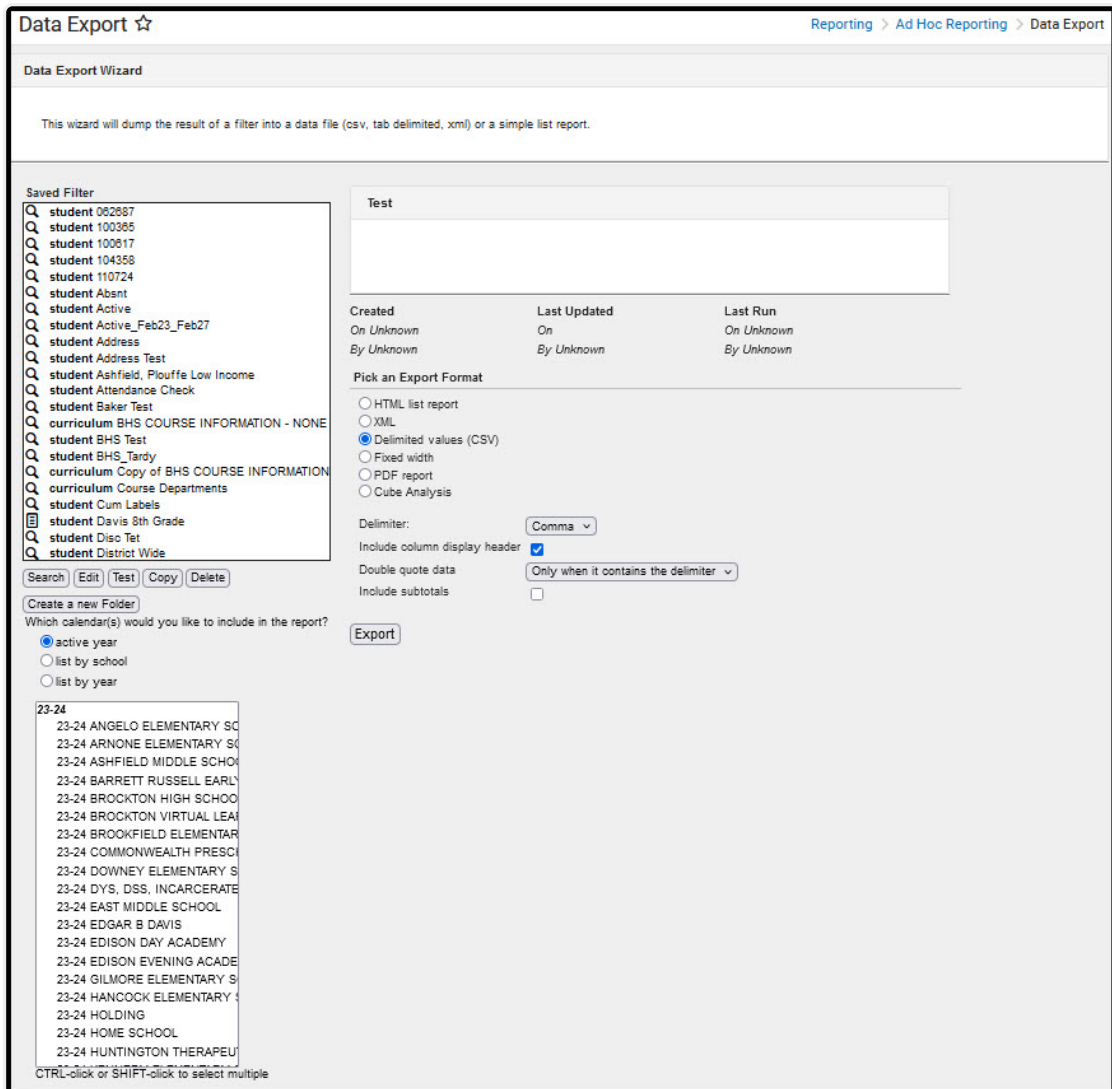
3. Give the filter a **Query Name** (preferably one you can easily identify later) and add the following fields to the filter

- **Person ID** - (Demographics > personID)
- **Instruction Mode Start Date** - (MA Instruction Mode > startDate)
- **Instruction Mode End Date** - (MA Instruction Mode > endDate)
- **Instruction Mode Status** - (MA Instruction Mode > status)



Ad Hoc Query - Field Selection

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- 4. Save the filter.
- 5. Now you need to export this filter into a CSV file. Navigate to the [Data Export](#) tool (Ad Hoc Reporting > Data Export).
- 6. Select the following values:
 1. Click the recently created filter in the Saved Filter window,
 2. Select the school(s) to update Instruction Mode for (or leave blank if doing a district-wide change)
 3. Select **Delimited values (CSV)** radio button.
 4. Click **Export**. Save the file to your local hard drive or network. You will need access to this file shortly.



Data Export Tool

7. Go to the [Federal/State Program Update Wizard](#) tool.

Currently, this document only covers how to do this process using the Import File.

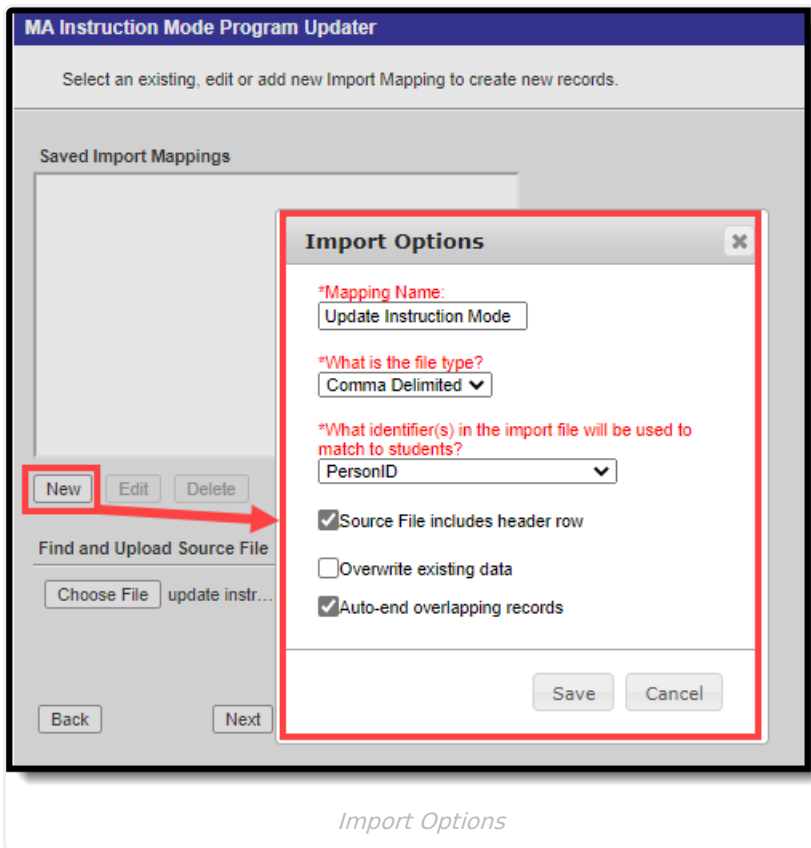
Additional information using the Add Participation/Delete Participation/Edit Participation options is forthcoming.

8. Select the **MA Instruction Mode**, click the **Add/Edit Participation** radio button, and click **Next**.



Federal/State Program Update Wizard

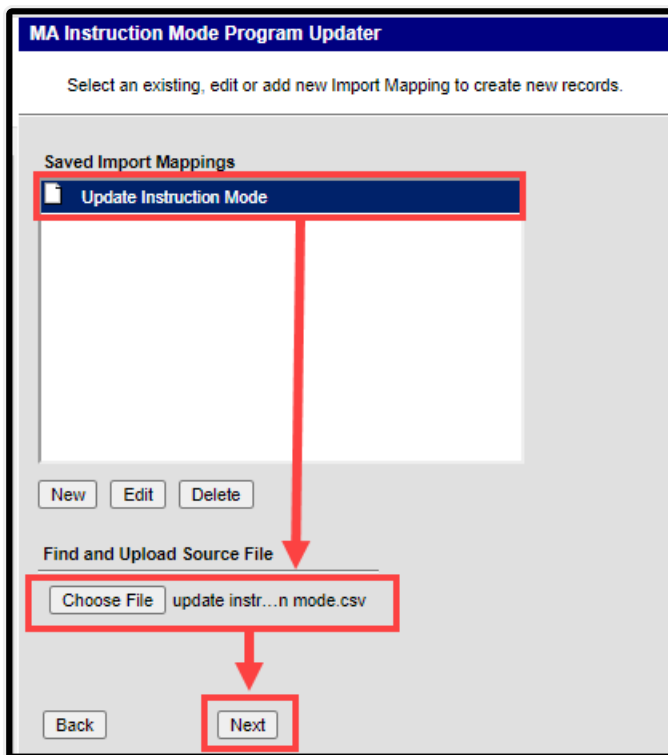
9. Click the **New** button and enter:
 1. Enter a **Mapping Name**.
 2. Select a file type of **Comma Delimited**.
 3. Select an identifier of **PersonID**.
 4. Mark the **Source file includes header row** checkbox.
 5. Mark the **Auto-end overlapping records**. This will allow you to enter a start date for the new Instruction Mode records that will auto-end date existing Instruction Mode records.
 6. Click **Save**. The new Import Mapping will appear in the Saved Import Mappings window.



Import Options

The **Overwrite existing data** checkbox will erase any existing data and replace it with the Set Value for any fields set in the steps below. You should leave this field unchecked if you do not want to replace any existing data.

10. Now that a mapping has been created, we can now import the CSV file and begin updating Instruction Mode data.
 1. Select the recently created import mapping
 2. Click the **Choose File** button.
 3. Locate the file on your drive and click **OK**. The file name should appear to the right of the Choose File button.
 4. Click **Next**.



Choose File

11. Now set the following values:
 1. **PersonID** - student.personID
 2. **Start Date** - Click the **Set Value** button and enter the date in which you want these students to have the updated Instruction Mode. Any existing Instruction mode records will be end dated to the day prior to this date and a new record with the Instruction Mode set below will be created.
 3. **End Date** - instruction.endDate
 4. **Instruction Mode** - Click the **Set Value** button the select the Instruction Mode value you want all students to now have. For example select 1 for In-Person.

MA Instruction Mode Program Updater

Enter the column number(s) from the import file that contain the student identifier(s):

Field Name	Column in Import File	Actions
*PersonID	student.personID	Clear

To import data, fill the Column in Import File box with the column from the Import File that corresponds with the Campus field. To batch update a field with the same value for all records, leave the column field blank. Select the Map Data button to select the action you want for each field. Leave the column field blank and do not create a field mapping if you do not have data to import or batch update for any of the non-required fields.

Field Name	Column in Import File	Actions
*Start Date		Set Value Clear
End Date	instructionMode.endDate	Edit Map Clear
*Instruction Mode		Set Value Clear

Run Test or Run Tool

Test or Batch Queue - Test

Add/Edit Records or Batch Queue - Add/Edit Records

Back

Refresh Show top 50 tasks submitted between 04/01/2021 and 04/08/2021

Batch Queue List	Report Title	Status	Download
Queued Time			

Import Data File Sample:

1	2	3	4
student.personID	instructionMode.startDate	instructionMode.endDate	instructionMode.status
90	11/21/2020		1
92	11/21/2020		2
99	11/21/2020		1
105	11/21/2020		2
115	11/21/2020		2
157	11/21/2020		1
170	11/21/2020		1
204	11/21/2020		1
212	11/21/2020		1
216	11/21/2020		1

Mapped Fields:

1	Set Value	3	Set Value
PersonID	Start Date	End Date	Instruction Mode
90	04/08/2021		01
92	04/08/2021		01
99	04/08/2021		01
105	04/08/2021		01
115	04/08/2021		01
157	04/08/2021		01
170	04/08/2021		01
204	04/08/2021		01
212	04/08/2021		01
216	04/08/2021		01

Instruction Mode Field Set Value

Campus Instruction Mode

01. In-Person

Save Cancel

Start Date Field Set Value

Date

04/08/2021

Save Cancel

Setting the Values in the Federal/State Program Update Tool.

- Click **Test** to test and audit these updates to ensure they are making the data changes you want. The test report will show you which student records were auto-ended with this change.
- Once you are done auditing and correcting any potential issues, you can initiate a change of Instruction Mode by clicking **Add/Edit Records**. A record of the changes made will appear.

That's it. Any Instruction Mode records prior to the Start Date entered in the Step 10 have been end dated and a new record with the entered Instruction Mode has been added. Any students in the filter who previously did not have an Instruction Mode record now have an Instruction Mode of the value set in Step 10.