

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

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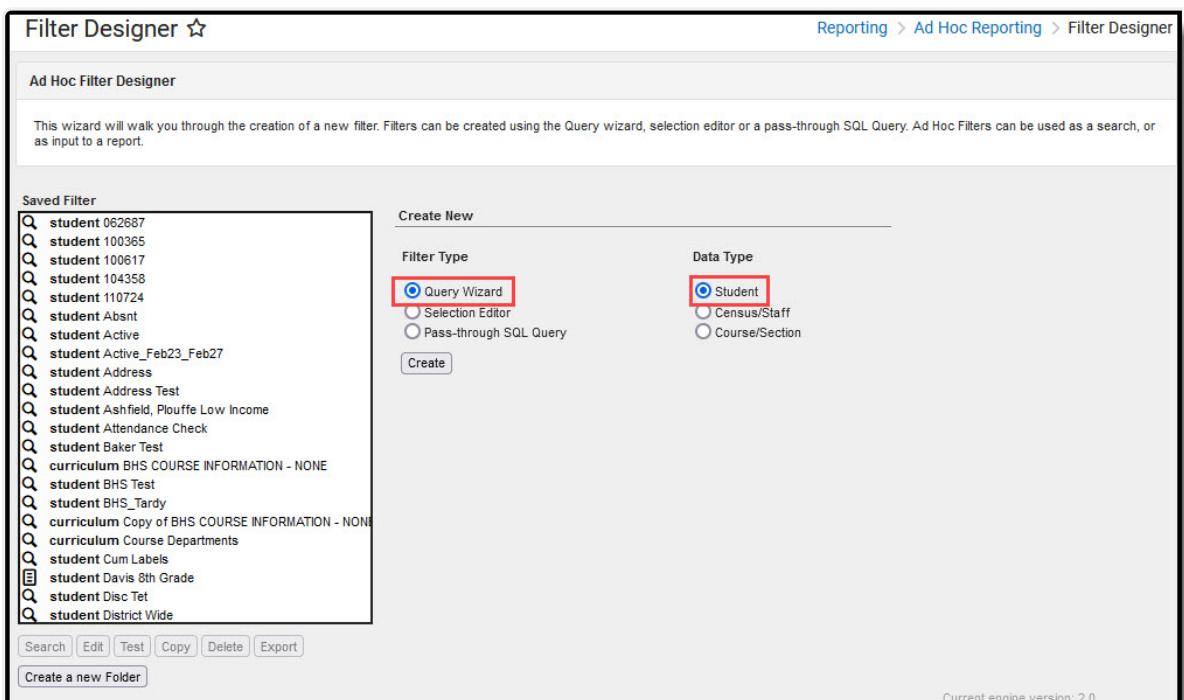
This article will walk you through the process of updating and adding a new Instruction Mode for a large set of students.

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.



The screenshot shows the 'Filter Designer' interface. The top navigation bar shows 'Reporting > Ad Hoc Reporting > Filter Designer'. The left sidebar is titled 'Ad Hoc Filter Designer' and contains a 'Saved Filter' list with various filter names. The main area is titled 'Create New' and contains two sections: 'Filter Type' and 'Data Type'. In the 'Filter Type' section, 'Query Wizard' is selected (radio button is checked). In the 'Data Type' section, 'Student' is selected (radio button is checked). Below these sections is a 'Create' button. At the bottom of the interface are buttons for 'Search', 'Edit', 'Test', 'Copy', 'Delete', 'Export', and a 'Create a new Folder' button. The bottom right corner of the interface displays the text 'Current engine version: 2.0'.

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 Wizard - Field Selection**

Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the Add Function window, select the field(s) and click the back arrow <--. The output will sequence the fields in the order selected; however, the sequence can be changed on the Output Formatting page.

Field Selection > Filter Parameters > Output Formatting > Grouping and Aggregation

\*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By  Search Clear

All Fields

Selected Fields

student.personID  
instructionMode.startDate  
instructionMode.endDate  
instructionMode.status

- 
- 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 ☆**

Reporting > Ad Hoc Reporting > Data Export

**Data Export Wizard**

This wizard will dump the result of a filter into a data file (csv, tab delimited, xml) or a simple list report.

**Saved Filter**

student 062887  
 student 100365  
 student 100817  
 student 104358  
 student 110724  
 student Absnt  
 student Active  
 student Active\_Feb23\_Feb27  
 student Address  
 student Address Test  
 student Ashfield\_Plouffe Low Income  
 student Attendance Check  
 student Baker Test  
 curriculum BHS COURSE INFORMATION - NONE  
 student BHS Test  
 student BHS\_Tardy  
 curriculum Copy of BHS COURSE INFORMATION  
 curriculum Course Departments  
 student Cum Labels  
 student Davis 8th Grade  
 student Disc Test  
 student District Wide

Which calendar(s) would you like to include in the report?

active year  
 list by school  
 list by year

**Test**

Created: On Unknown      Last Updated: On      Last Run: On Unknown  
 By Unknown      By Unknown

**Pick an Export Format**

HTML list report  
 XML  
 Delimited values (CSV)  
 Fixed width  
 PDF report  
 Cube Analysis

Delimiter:   Include column display header  
 Double quote data:   Include subtotals

**23-24**

23-24 ANGELO ELEMENTARY SC  
 23-24 ARNONE ELEMENTARY SC  
 23-24 ASHFIELD MIDDLE SCHOOL  
 23-24 BARRETT RUSSELL EARLY  
 23-24 BROCKTON HIGH SCHOOL  
 23-24 BROCKTON VIRTUAL LEARN  
 23-24 BROOKFIELD ELEMENTARY  
 23-24 COMMONWEALTH PRESCHOOL  
 23-24 DOWNEY ELEMENTARY S  
 23-24 DYS, DSS, INCARCERATE  
 23-24 EAST MIDDLE SCHOOL  
 23-24 EDGAR B DAVIS  
 23-24 EDISON DAY ACADEMY  
 23-24 EDISON EVENING ACADEMY  
 23-24 GILMORE ELEMENTARY S  
 23-24 HANCOCK ELEMENTARY S  
 23-24 HOLDING  
 23-24 HOME SCHOOL  
 23-24 HUNTINGTON THERAPEUTIC

CTRL-click or SHIFT-click to select multiple

*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 ☆

Student Information > Program Administration > Federal/State Program Update Wizard

### Federal/State Program Updater

The Federal/State Program Updater allows federal or state program participation data to be added or edited using an import file. Federal or state program participation data records can also be added, edited, or deleted using an Ad hoc filter. For programs that allow an Owner to be specified, edit, delete, and overlapping record logic will be limited to records owned by this District or State Edition.

Select Federal Program:  
MA Instruction Mode

Select Mode:

Import File:  
 Add/Edit Participation  
 Ad Hoc Filter:  
 Add Participation  
 Delete Participation  
 Edit Participation

Next

## Federal/State Program Update Wizard

- Click the **New** button and enter:
  - Enter a **Mapping Name**.
  - Select a file type of **Comma Delimited**.
  - Select an identifier of **PersonID**.
  - Mark the **Source file includes header row** checkbox.
  - 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.
  - Click **Save**. The new Import Mapping will appear in the Saved Import Mappings window.

**MA Instruction Mode Program Updater**

Select an existing, edit or add new Import Mapping to create new records.

**Saved Import Mappings**

**Import Options**

\*Mapping Name:

\*What is the file type?

\*What identifier(s) in the import file will be used to match to students?

Source File includes header row

Overwrite existing data

Auto-end overlapping records

**New** **Edit** **Delete**

**Find and Upload Source File**

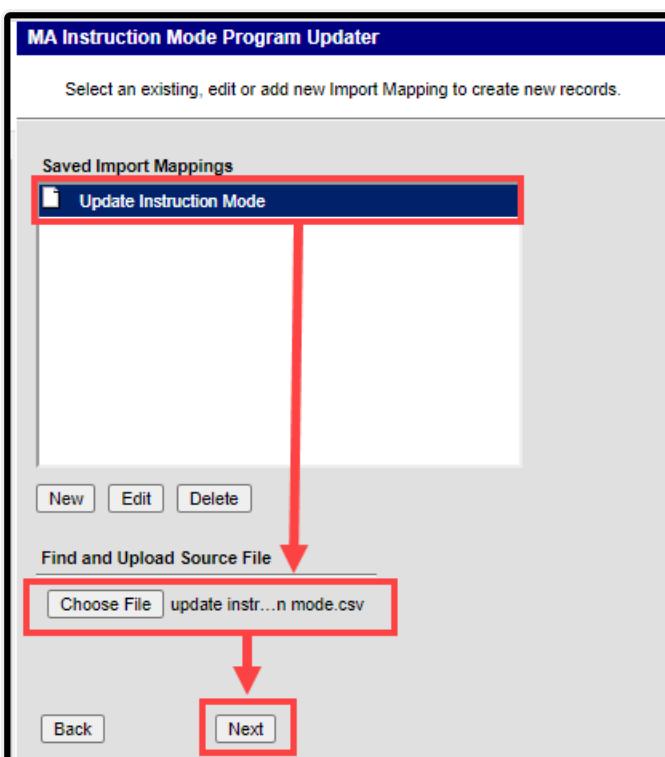
**Choose File** **update instr...**

**Back** **Next**

**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	<input type="button" value="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	<input type="button" value="Set Value"/>	<input type="button" value="Clear"/>
End Date	<input type="button" value="Edit Map"/>	<input type="button" value="Clear"/>
*Instruction Mode	<input type="button" value="Set Value"/>	<input type="button" value="Clear"/>

Run Test or Run Tool

or

or

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	2	3	4
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

Batch Queue List

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

Batch Queue List

Queued Time Report Title Status Download

Instruction Mode Field Set Value

Campus Instruction Mode  
01: In-Person

Start Date Field Set Value

Date: 04/08/2021

Save Cancel

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

12. 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-end dated with this change.
13. 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.