

# 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.

Filter Designer ☆ Reporting > Ad Hoc Reporting > Filter Designer

Ad Hoc Filter Designer

This wizard will walk you through the creation of a new filter. Filters can be created using the Query wizard, selection editor or a pass-through SQL Query. Ad Hoc Filters can be used as a search, or as input to a report.

Saved Filter

- Q student 062687
- Q student 100365
- Q student 100617
- Q student 104358
- Q student 110724
- Q student Absnt
- Q student Active
- Q student Active\_Feb23\_Feb27
- Q student Address
- Q student Address Test
- Q student Ashfield, Plouffe Low Income
- Q student Attendance Check
- Q student Baker Test
- Q curriculum BHS COURSE INFORMATION - NONE
- Q student BHS Test
- Q student BHS\_Tardy
- Q curriculum Copy of BHS COURSE INFORMATION - NONE
- Q curriculum Course Departments
- Q student Cum Labels
- Q student Davis 8th Grade
- Q student Disc Tet
- Q student District Wide

Search | Edit | Test | Copy | Delete | Export

Create a new Folder

Create New

Filter Type

☒ Query Wizard

☐ Selection Editor

☐ Pass-through SQL Query

Create

Data Type

☒ Student

☐ Census/Staff

☐ Course/Section

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 screen.

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

\*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By  Search Clear

All Fields

- [-] District
  - [-] Learner
    - Active Enrollment
    - Graduation elements
    - State Localized Elements
    - All Enrollments
    - Enrollment History
    - Homeless
    - State Programs
      - Instruction Mode
        - instructionModelID
        - personID
        - districtID
        - instructionModeGUID
        - startDate
        - endDate
        - status

Selected Fields

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

<--

*Ad Hoc Query - Field Selection*

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 100385
- student 100617
- 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 Disco Tet
- student District Wide

Search Edit Test Copy Delete

Create a new Folder

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

☒ active year  
☐ list by school  
☐ list by year

23-24

- 23-24 ANGELO ELEMENTARY SC
- 23-24 ARNONE ELEMENTARY S
- 23-24 ASHFIELD MIDDLE SCHOL
- 23-24 BARRETT RUSSELL EARL
- 23-24 BROCKTON HIGH SCHOO
- 23-24 BROCKTON VIRTUAL LEA
- 23-24 BROOKFIELD ELEMENTAR
- 23-24 COMMONWEALTH PRESCI
- 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 ACADE
- 23-24 GILMORE ELEMENTARY S
- 23-24 HANCOCK ELEMENTARY S
- 23-24 HOLDING
- 23-24 HOME SCHOOL
- 23-24 HUNTINGTON THERAPEU

CTRL-click or SHIFT-click to select multiple

Test

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

Pick an Export Format

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

Delimiter: Comma  
 Include column display header ☒  
 Double quote data Only when it contains the delimiter  
 Include subtotals ☐

Export

Data Export Tool

- 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.

- 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*

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.

**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:  
Update Instruction Mode

\*What is the file type?  
Comma Delimited ▾

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

☒ Source File includes header row

☐ Overwrite existing data

☒ Auto-end overlapping records

Save Cancel

New Edit Delete

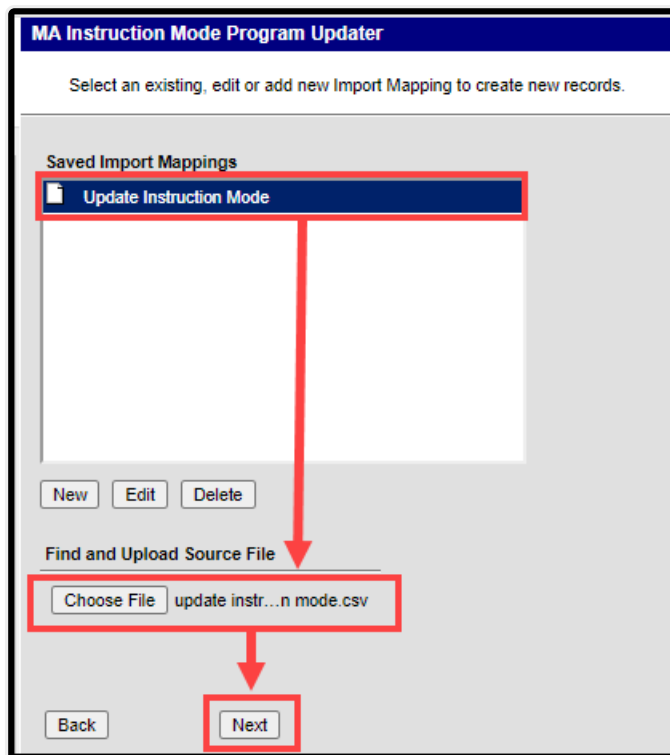
Find and Upload Source File  
Choose File update instr...

Back Next

*Import Options*

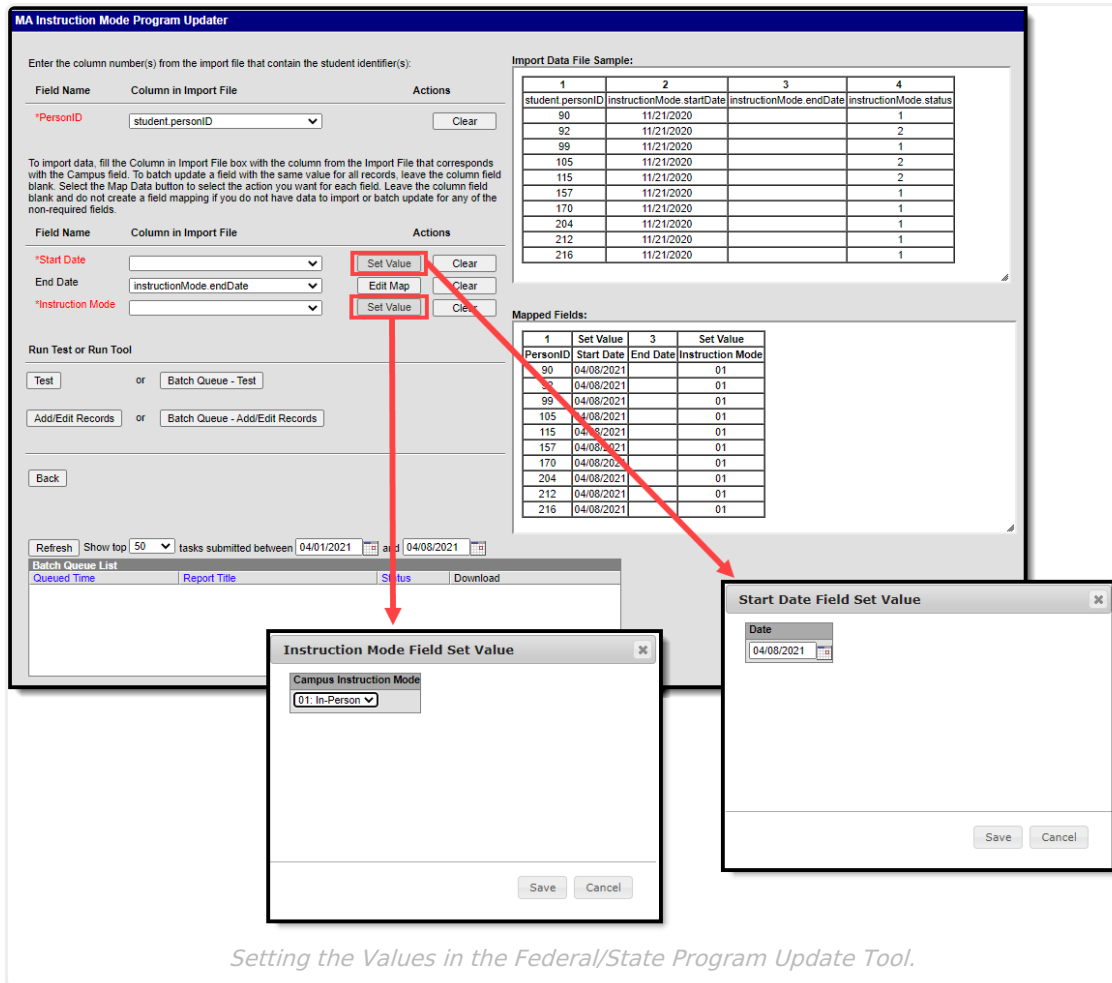
The **Overwrite existing data** checkbox will erase any existing data and replace it with the Set Value for any fields set in the steps below. You should leave this field unchecked if you do not want to replace any existing data.

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	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

Queued Time	Report Title	Status	Download

**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-end dated 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.