

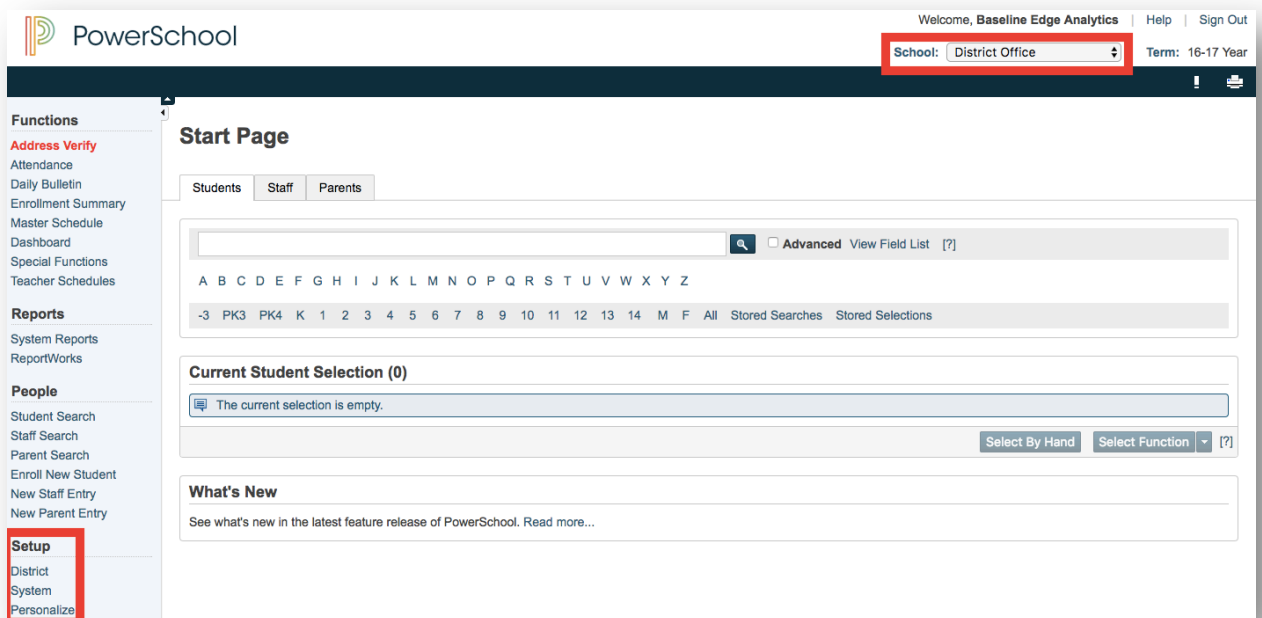


PowerSchool Insights Setup Guide

This guide details the steps necessary to create a data export connection between PowerSchool and IO Insights. If you have questions about this guide or how to setup your PowerSchool account to export data to IO Insights, please contact us at **support@ioeducation.com**.

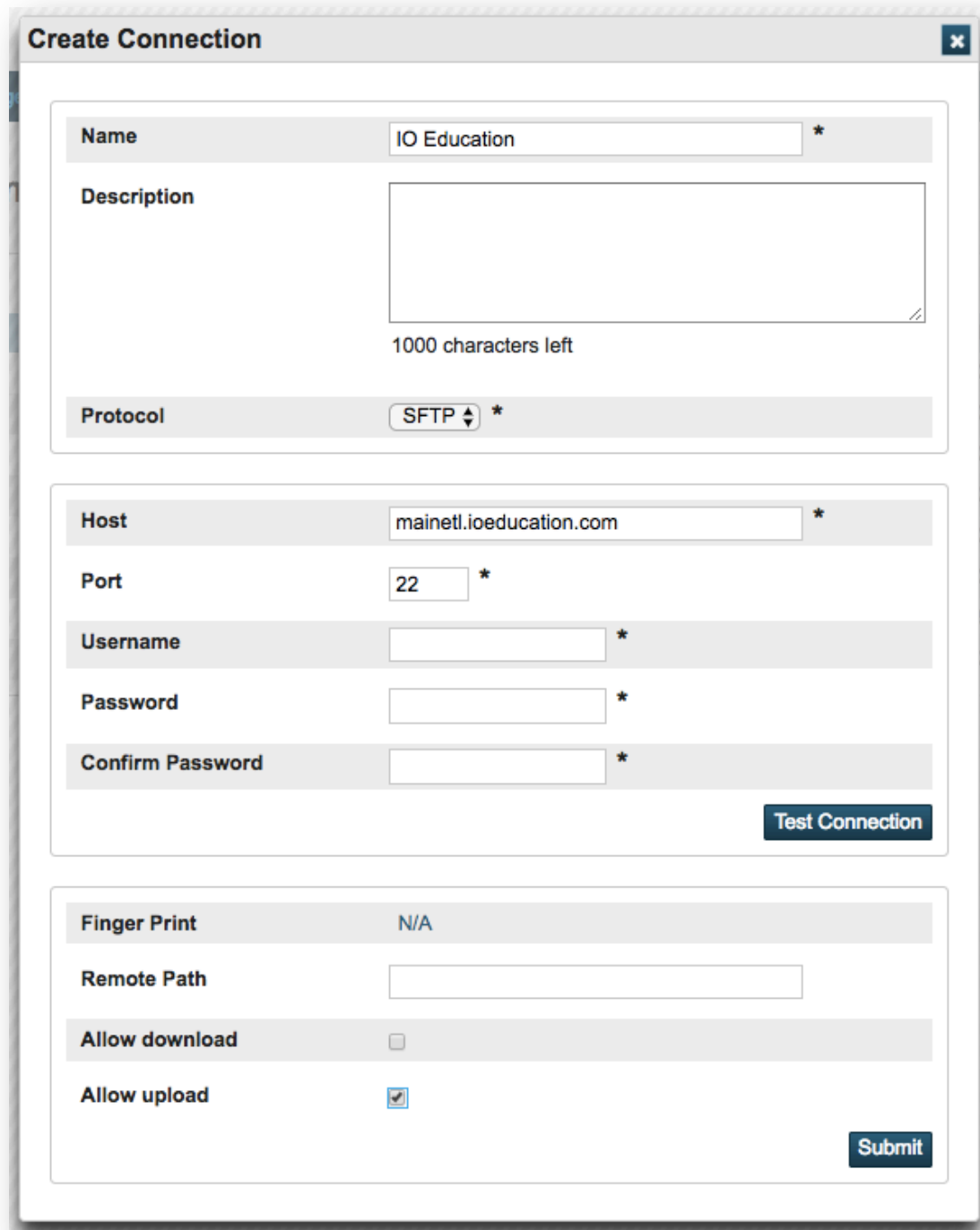
➤ Setting up Secure FTP Connection

1. **Login to PowerSchool.** From the Start Page, **make sure the District account is selected** in the top right corner of the page (if not, click “School” to change the selection). Once confirmed, locate the “Setup” section in the left menu bar and **click System.**



2. On the System Administrator page, scroll down to the section titled “Server” and **click System Settings.**
3. On the System Settings page, choose **Plugin Management Configuration**, and, on that page, **click Remote Connection Manager.**
4. In the “Function” section, again **click Remote Connection Manager.**

5. **Click Create Connection** in the top right corner and fill in the information from the image below, using the username and password provided to you by IO Education. When all of the information is entered, **click Submit**.

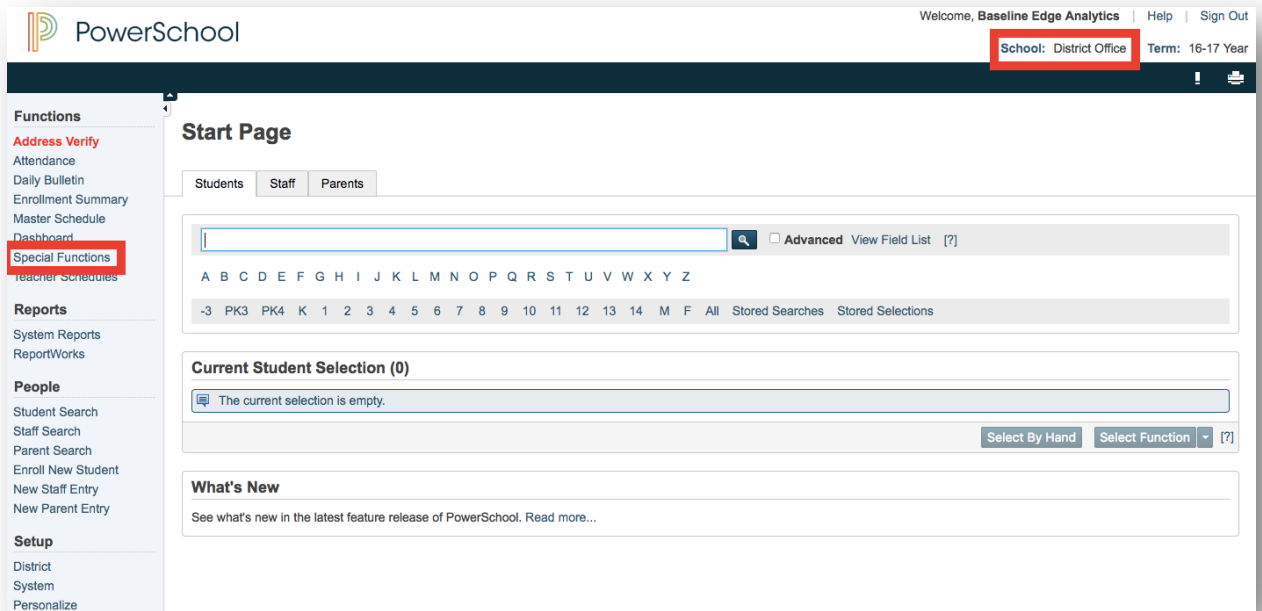


The image shows a 'Create Connection' dialog box with the following fields and options:

- Name:** IO Education *
- Description:** (Empty text area) 1000 characters left
- Protocol:** SFTP *
- Host:** mainetl.ioeducation.com *
- Port:** 22 *
- Username:** (Empty text field) *
- Password:** (Empty text field) *
- Confirm Password:** (Empty text field) *
- Test Connection:** (Button)
- Finger Print:** N/A
- Remote Path:** (Empty text field)
- Allow download:** ☐
- Allow upload:** ☒
- Submit:** (Button)

➤ Setting up Secure FTP Connection

1. From the Start Page, **make sure the District account is selected** in the top right corner of the page. Once confirmed, locate the “Functions” section in the left menu bar and **click Special Functions**.



2. Click **Importing or Exporting**, and on the next page, under the “Exporting” section, **click Data Export Manager**.
3. CATEGORY>CURRENT YEAR SCHED, EXPORT FROM>COURSES>Pick fields on screenshot>NEXT>NEXT>

Courses:

ExportMy TemplatesScheduled System Templates

Template Loaded

Category

Current Year Sched

Export From

Terms

TERMS

☒ ID
☐ dcd
☒ Abbreviation
☐ Attendance_Calculation_Code
☐ AutoBuildDim
☐ Days_Per_Cycle
☒ FirstDay
☐ ImportMap
☐ IsYearRec
☒ LastDay
☒ Name
☒ NoOfDays

Sort	Field	Labels Used on Export	Remove
<div>+</div> <div>-</div>	TERMS.ID	TERMS.ID	<div>-</div>
<div>+</div> <div>-</div>	TERMS.SchoolID	TERMS.SchoolID	<div>-</div>
<div>+</div> <div>-</div>	TERMS.Abbreviation	TERMS.Abbreviation	<div>-</div>
<div>+</div> <div>-</div>	TERMS.Name	TERMS.Name	<div>-</div>
<div>+</div> <div>-</div>	TERMS.FirstDay	TERMS.FirstDay	<div>-</div>
<div>+</div> <div>-</div>	TERMS.LastDay	TERMS.LastDay	<div>-</div>
<div>+</div> <div>-</div>	TERMS.NoOfDays	TERMS.NoOfDays	<div>-</div>

Next

Select Records to Export

Export Summary and Output Options

ExportMy TemplatesScheduled System Templates

Select Columns to Export

Select/Edit Records from Terms

Export Summary and Output Options

Export Summary

Records to Export: 25

Export Format

Export File Name: gradingperiods.csv

Line Delimiter: CR/LF

Field Delimiter: Comma

Character Set: Windows ANSI

Export Options

Include Column Headers: ☒

Surround "field values" in Quotes: ☐

Prev

Save Template

Export

Grading Periods:

Data Export Manager

Export
My Templates
Scheduled System Templates

Template Loaded

Select Columns to Export

Category
Current Year Sched

Export From
Terms

TERMS
ID
dcd
Abbreviation
Attendance_Calculation_Code
AutoBuildDim
Days_Per_Cycle
FirstDay
ImportMap
IsYearRec
LastDay
Name
NoOfDays

Sort
Field
Labels Used on Export
Remove

<input checked="" type="checkbox"/>	TERMS.ID	TERMS.ID	TERMS.ID	
<input checked="" type="checkbox"/>	TERMS.SchoolID	TERMS.SchoolID	TERMS.SchoolID	
<input checked="" type="checkbox"/>	TERMS.Abbreviation	TERMS.Abbreviation	TERMS.Abbreviation	
<input checked="" type="checkbox"/>	TERMS.Name	TERMS.Name	TERMS.Name	
<input checked="" type="checkbox"/>	TERMS.FirstDay	TERMS.FirstDay	TERMS.FirstDay	
<input checked="" type="checkbox"/>	TERMS.LastDay	TERMS.LastDay	TERMS.LastDay	
<input checked="" type="checkbox"/>	TERMS.NoOfDays	TERMS.NoOfDays	TERMS.NoOfDays	

Select Records to Export

Export Summary and Output Options

Export
My Templates
Scheduled System Templates

Select Columns to Export

Select/Edit Records from Terms

Export Summary and Output Options

Export Summary

Records to Export: 25

Export Format

Export File Name: gradingperiods.csv

Line Delimiter: CR/LF

Field Delimiter: Comma

Character Set: Windows ANSI

Export Options

Include Column Headers:

Surround "field values" in Quotes:

Prev

Save Template
Export

Discipline:

Export | My Templates | Scheduled System Templates

Template Loaded.

Select Columns to Export

Category: Incident Management

Export From: Log

Select All				
<input checked="" type="checkbox"/>	LOG			
<input type="checkbox"/>	LOG			
<input type="checkbox"/>	Category			
<input checked="" type="checkbox"/>	Consequence			
<input type="checkbox"/>	Discipline_ActionDate			
<input checked="" type="checkbox"/>	Discipline_ActionTaken			
<input type="checkbox"/>	Discipline_ActionTakenEndDate			
<input type="checkbox"/>	Discipline_AdministratorID			
<input type="checkbox"/>	Discipline_AlcoholRelatedFlag			
<input type="checkbox"/>	Discipline_DrugRelatedFlag			
<input type="checkbox"/>	LOG StudentID		LOG StudentID	
<input type="checkbox"/>	LOG SchoolID		LOG SchoolID	
<input type="checkbox"/>	LOG Discipline_IncidentDate		LOG Discipline_IncidentDate	
<input type="checkbox"/>	LOG Discipline_IncidentLocation		LOG Discipline_IncidentLocation	
<input type="checkbox"/>	LOG Discipline_IncidentType		LOG Discipline_IncidentType	
<input type="checkbox"/>	LOG Discipline_ActionTaken		LOG Discipline_ActionTaken	
<input type="checkbox"/>	LOG Consequence		LOG Consequence	
<input type="checkbox"/>	LOG Discipline_DurationAssigned		LOG Discipline_DurationAssigned	

Next >

Select Records to Export

Export Summary and Output Options

Export | My Templates | Scheduled System Templates

Template Loaded.

Select Columns to Export

Category: Incident Management

Export From: Log

Sort	Field	Log	Labels Used on Export	Remove
	LOG StudentID		LOG StudentID	
	LOG SchoolID		LOG SchoolID	
	LOG Discipline_IncidentDate		LOG Discipline_IncidentDate	
	LOG Discipline_IncidentLocation		LOG Discipline_IncidentLocation	
	LOG Discipline_IncidentType		LOG Discipline_IncidentType	
	LOG Discipline_ActionTaken		LOG Discipline_ActionTaken	

Next >

Select Records to Export

Export Summary and Output Options

Export | My Templates | Scheduled System Templates

Select Columns to Export

Select/Edit Records from Log

Export Summary and Output Options

Export Summary

Records to Export: 14435

Export Format

Export File Name: Discipline.csv

Line Delimiter: CR

Field Delimiter: Comma

Character Set: Mac Roman

Export Options

Include Column Headers: ☒

Surround "field values" in Quotes: ☐

Prev Save Template Export >

Schedule:

Set Schedule - BASELINE-COURSES (copy)

Schedule Active

☒

Days to Execute

☒ Mon ☒ Tue ☒ Wed ☒ Thu

☒ Fri ☐ Sat ☐ Sun

When to Execute

Send Output To

Path

Email Completion Report To

Cancel

Save

10:17 AM

➤ Setting up Automatic Export

1. From the Start Page, **make sure the District account is selected** in the top right corner of the page. Once confirmed, locate the “Setup” section in the left menu bar and **click System**.
2. Under the “Data Management” section, **click AutoSend Setup**.
3. **Click New**, and for each of the District categories below, enter the information on the images below, clicking **Submit** to save each one.

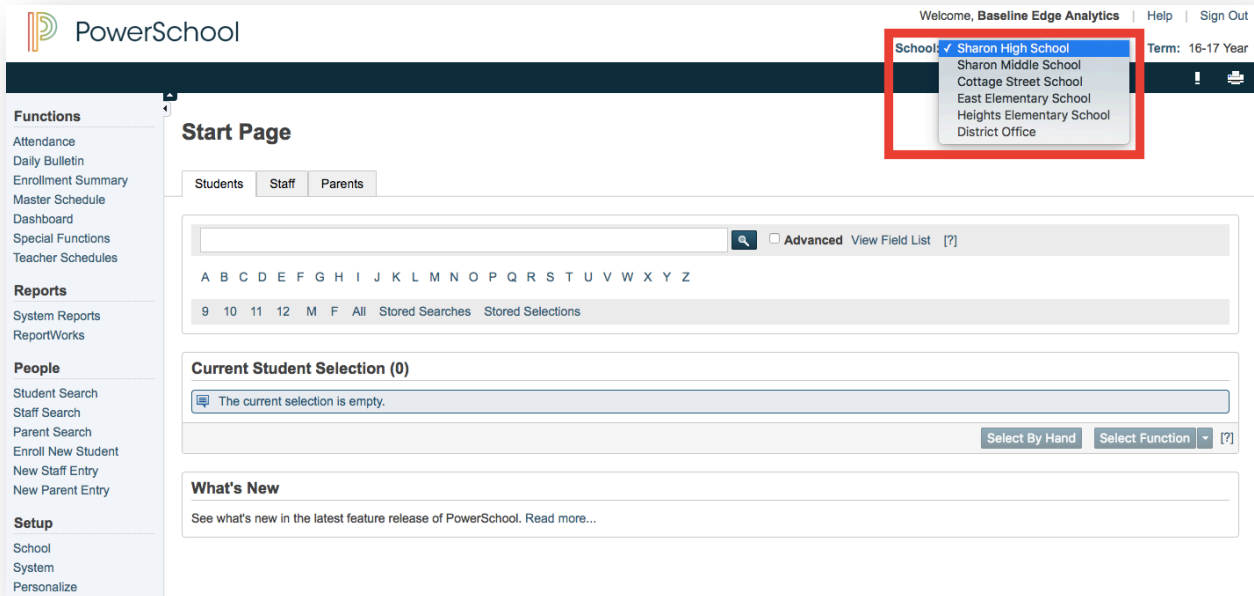
STAFF:

Value
<input type="text" value="BASELINE-STAFF"/>
<input type="text" value="Teachers"/>
<input type="text" value="01:00 AM"/>
<input type="text" value="MTWHF"/> (MTWHFSU)
<input type="checkbox"/>
<input type="text" value="Managed Connection"/>
<input type="text" value="BaselineEdge"/>
<input type="text" value="teachers.csv"/>
<input type="text" value="Comma"/>
<input type="text" value="CRLF"/>
<input type="text" value="0"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input checked="" type="radio"/> Send any attendance modified in last 24 hrs
<input type="radio"/> Send attendance modified since last upload
<input type="radio"/> Send attendance modified between these dates
From <input type="text" value="0/0/0"/> <input type="button" value="Calendar"/> To <input type="text" value="0/0/0"/> <input type="button" value="Calendar"/>
<input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<input type="text"/>
<div>SchoolId Title TeacherNumber ID Last_Name Middle_Name First_Name Email_Addr</div>

STUDENTS:

Value
<input type="text" value="BASELINE-STUDENTS"/>
<input type="text" value="Students"/>
<input type="text" value="01:05 AM"/>
<input type="text" value="MTWHF"/> (MTWHFSU)
<input type="checkbox"/>
<input type="text" value="Managed Connection"/>
<input type="text" value="BaselineEdge"/>
<input type="text" value="students.csv"/>
<input type="text" value="Comma"/>
<input type="text" value="CRLF"/>
<input type="text" value="0"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input checked="" type="radio"/> Send any attendance modified in last 24 hrs
<input type="radio"/> Send attendance modified since last upload
<input type="radio"/> Send attendance modified between these dates
From <input type="text" value="0/0/0"/> <input type="button" value="Calendar"/> To <input type="text" value="0/0/0"/> <input type="button" value="Calendar"/>
<input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<input type="text" value="marcus@sharon.k12.ma.us"/>
<div><div>Student_Number</div><div>SchoolID</div><div>Last_name</div><div>Middle_Name</div><div>First_name</div><div>Enroll_Status</div><div>Grade_Level</div><div>Gender</div><div>Ethnicity</div><div>DOB</div></div>

- To set up School categories, **click School** in the top right corner of any page, and **select any school** from the dropdown list. The Start Page will appear.



- Locate the “Setup” section in the left menu bar and **click System**.
- Under the “Data Management” section, **click AutoSend Setup**.
- Click New**, and for each of the School categories below, enter the information on the images below. At the bottom of each form, **click the checkbox to duplicate each AutoSend record** to all schools, which copies the exports to all other schools. Click **Submit** to save each one.

☒ Duplicate this AutoSend record to all schools on this server (use only when creating a new AutoSend record)

SECTIONS:

Value
BASELINE Sections
Sections ▼
🕒 02:15 AM
MTWHF (MTWHFSU)
<input type="checkbox"/>
Managed Connection ▼
BaselineEdge ▼
sectionsSHS.csv
Comma ▼
CRLF ▼
0
<input type="checkbox"/>
<input type="checkbox"/>
<input checked="" type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From 0/0/0 📅 To 0/0/0 📅 <input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<pre>ID Course_Number TermID SchoolID [5]TeacherNumber</pre>

SCHEDULES:

Value
BASELINE- SCHEDULES
Student schedules ▼
🕒 03:00 AM
MTWHF (MTWHFSU)
<input type="checkbox"/>
Managed Connection ▼
BaselineEdge ▼
schedulesSHS.csv
Comma ▼
CRLF ▼
0
<input type="checkbox"/>
<input type="checkbox"/>
<input checked="" type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From 0/0/0 📅 To 0/0/0 📅 <input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
[1]Student_Number SectionID TermID

rd)

ATTENDANCE:

Value
<input type="text" value="BASELINE-ATTENDANCE"/>
<input type="text" value="Attendance - Daily"/>
<input type="text" value="🕒 01:00 AM"/>
<input type="text" value="MTWHF"/> (MTWHFSU)
<input type="checkbox"/>
<input type="text" value="Managed Connection"/>
<input type="text" value="BaselineEdge"/>
<input type="text" value="attendanceSHS.csv"/>
<input type="text" value="Comma"/>
<input type="text" value="CRLF"/>
<input type="text" value="0"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From <input type="text" value="0/0/0"/> <input type="button" value="📅"/> To <input type="text" value="0/0/0"/> <input type="button" value="📅"/> <input checked="" type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<input type="text"/>
<div> <div>StudentNumber</div> <div>SchoolID</div> <div>ATT_Code</div> <div>ATT_Date</div> <div>Period</div> </div>

8. After each category export has been created under the initial school, the path names for each of the other schools must be changed. **Click School** in the top right corner of the page, and **select a school** from the dropdown list. When the Start Page appears, **click System>AutoSend Setup**.
9. **Click on each of the newly created category exports and alter the Path name so that it is unique to the school** (inserting each schools initials is one way to do this). **Click Submit** to save the changes. **Steps 8 and 9 must be completed for each category within each school.**

AutoSend Record

Field	Value
Name	BASLINE-ATTENDANCE
Data to Send	Attendance - Daily
When to Execute	01:00 AM
Days to Execute	MTWHF (MTWHFSU)
Turn Execution Off	<input type="checkbox"/>
Send Output to	Managed Connection BaselineEdge
Path	attendanceCSS.csv
Field Delimiter	Comma
Record Delimiter	CRLF
Sort Order	0
First record of file is "number_of_records=" *	<input type="checkbox"/>
Include "upload_type=" **	<input type="checkbox"/>
Attendance-Specific Settings:	<input type="radio"/> Send any attendance modified in last 24 hrs <input type="radio"/> Send attendance modified since last upload <input type="radio"/> Send attendance modified between these dates From 0/0/0 To 0/0/0 <input checked="" type="radio"/> Send all attendance to date
Student-Specific Settings:	All current students at the school are automatically sent.
E-Mail completion report to (Separate multiple addresses with commas)	
Fields to export: Attendance Field list:	Student_Number SchoolID ATT_Code ATT_Date Period