



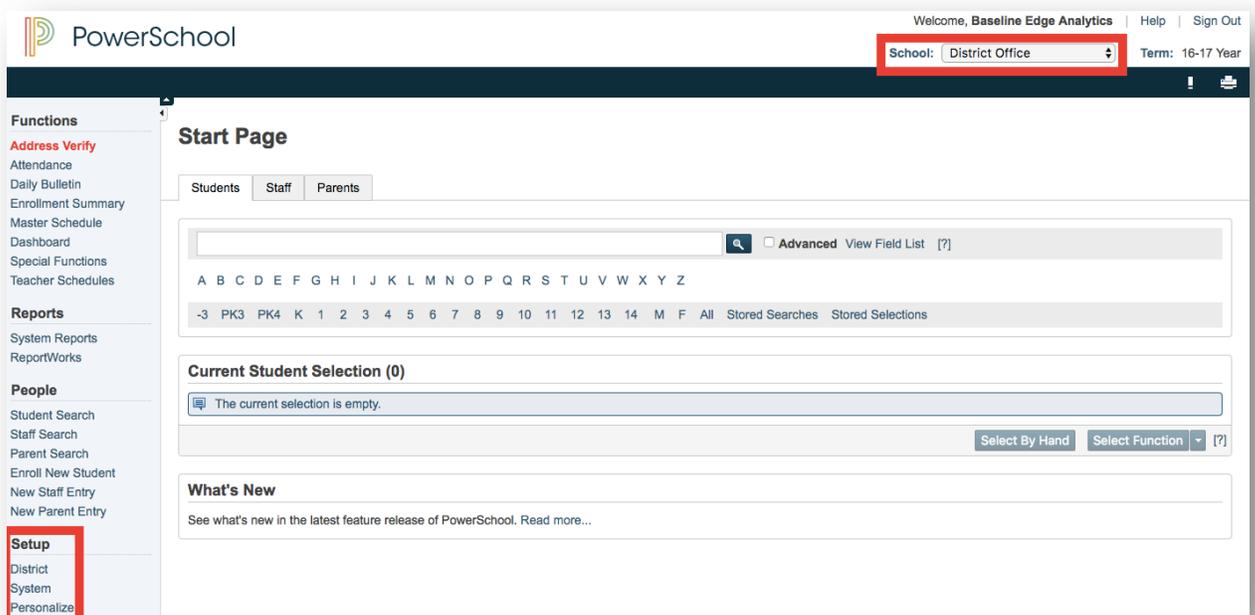
io education

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**](mailto: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**.

Create Connection ✕

Name	<input type="text" value="IO Education"/> *
Description	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>1000 characters left</p>
Protocol	<input type="text" value="SFTP"/> *

Host	<input type="text" value="mainetl.ioeducation.com"/> *
Port	<input type="text" value="22"/> *
Username	<input type="text"/> *
Password	<input type="password"/> *
Confirm Password	<input type="password"/> *

Test Connection

Finger Print	N/A
Remote Path	<input type="text"/>
Allow download	<input type="checkbox"/>
Allow upload	<input checked="" type="checkbox"/>

Submit

➤ 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**.

The screenshot shows the PowerSchool user interface. At the top right, the user is logged in as 'Baseline Edge Analytics' for 'District Office' in the '16-17 Year' term. The left-hand navigation menu is expanded to show the 'Functions' section, where 'Special Functions' is highlighted. The main area is the 'Start Page' for 'Students', featuring a search bar, a grid of filters (A-Z, PK3, PK4, K, 1-14, M, F, All), and a 'Current Student Selection (0)' section with a 'Select Function' dropdown. A 'What's New' section is also visible at the bottom.

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:

Data Export Manager

Export | My Templates | Scheduled System Templates

Template Loaded

Select Columns to Export

Category: Current Year Sched
Export From: Terms

TERMS	Sort	Field	Labels Used on Export	Remove
<input checked="" type="checkbox"/> ID	[-]	TERMS.ID	TERMS.ID	[-]
<input type="checkbox"/> dcid				
<input checked="" type="checkbox"/> Abbreviation	[-]	TERMS.SchoolID	TERMS.SchoolID	[-]
<input type="checkbox"/> Attendance_Calculation_Code				
<input type="checkbox"/> AutoBuildDim	[-]	TERMS.Abbreviation	TERMS.Abbreviation	[-]
<input type="checkbox"/> Days_Per_Cycle				
<input checked="" type="checkbox"/> FirstDay	[-]	TERMS.Name	TERMS.Name	[-]
<input type="checkbox"/> ImportMap				
<input type="checkbox"/> IsYearRec	[-]	TERMS.FirstDay	TERMS.FirstDay	[-]
<input checked="" type="checkbox"/> LastDay				
<input checked="" type="checkbox"/> Name	[-]	TERMS.LastDay	TERMS.LastDay	[-]
<input checked="" type="checkbox"/> 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

Grading Periods:

Data Export Manager

Export | My Templates | Scheduled System Templates

Template Loaded

Select Columns to Export

Category: Current Year Sched
Export From: Terms

Category	Sort	Field	Labels Used on Export	Remove
<input checked="" type="checkbox"/> TERMS				
<input checked="" type="checkbox"/> ID		TERMS.ID	TERMS.ID	<input type="checkbox"/>
<input type="checkbox"/> dcid				
<input checked="" type="checkbox"/> Abbreviation		TERMS.SchoolID	TERMS.SchoolID	<input type="checkbox"/>
<input type="checkbox"/> Attendance_Calculation_Code				
<input type="checkbox"/> AutoBuildDim		TERMS.Abbreviation	TERMS.Abbreviation	<input type="checkbox"/>
<input type="checkbox"/> Days_Per_Cycle				
<input checked="" type="checkbox"/> FirstDay		TERMS.Name	TERMS.Name	<input type="checkbox"/>
<input type="checkbox"/> ImportMap				
<input type="checkbox"/> IsYearRec		TERMS.FirstDay	TERMS.FirstDay	<input type="checkbox"/>
<input checked="" type="checkbox"/> LastDay				
<input checked="" type="checkbox"/> Name		TERMS.LastDay	TERMS.LastDay	<input type="checkbox"/>
<input checked="" type="checkbox"/> NoOfDays		TERMS.NoOfDays	TERMS.NoOfDays	<input type="checkbox"/>

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		Field	Field	
<input type="checkbox"/>	<input type="checkbox"/>	LOG StudentID	LOG StudentID	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG SchoolID	LOG SchoolID	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentDate	LOG Discipline_IncidentDate	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentLocation	LOG Discipline_IncidentLocation	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentType	LOG Discipline_IncidentType	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_ActionTaken	LOG Discipline_ActionTaken	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Consequence	LOG Consequence	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_DurationAssigned	LOG Discipline_DurationAssigned	<input type="checkbox"/>

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

Select All	Sort	Field	Labels Used on Export	Remove
<input type="checkbox"/>	<input type="checkbox"/>	LOG StudentID	LOG StudentID	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG SchoolID	LOG SchoolID	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentDate	LOG Discipline_IncidentDate	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentLocation	LOG Discipline_IncidentLocation	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_IncidentType	LOG Discipline_IncidentType	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	LOG Discipline_ActionTaken	LOG Discipline_ActionTaken	<input type="checkbox"/>

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:

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

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.

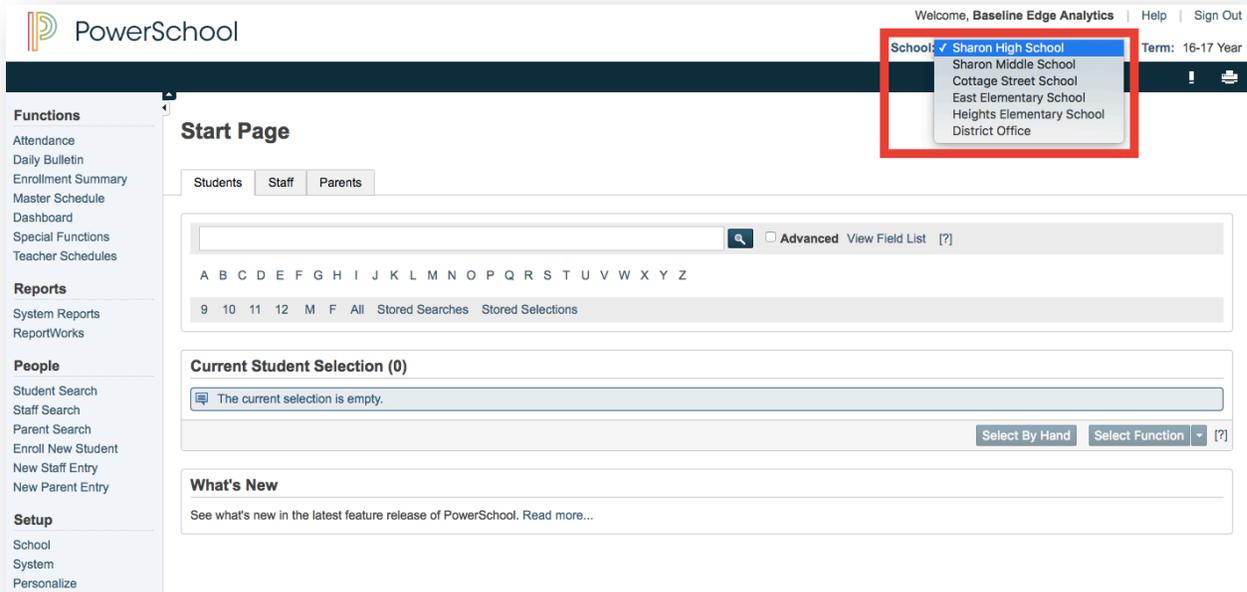
STAFF:

Value
BASELINE-STAFF
Teachers ▼
🕒 01:00 AM
MTWHF (MTWHFSU)
<input type="checkbox"/>
Managed Connection ▼
BaselineEdge ▼
teachers.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.
<input type="text"/>
<pre>Schoollid Title TeacherNumber ID Last_Name Middle_Name First_Name Email_Addr</pre>

STUDENTS:

Value
BASELINE-STUDENTS
Students ▼
🕒 01:05 AM
MTWHF (MTWHFSU)
<input type="checkbox"/>
Managed Connection ▼
BaselineEdge ▼
students.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 <input type="text" value="0/0/0"/> 📅 To <input type="text" value="0/0/0"/> 📅 <input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
marcus@sharon.k12.ma.us
<pre> Student_Number SchoolID Last_name Middle_Name First_name Enroll_Status Grade_Level Gender Ethnicity DOB </pre>

- 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
<input type="text" value="BASELINE Sections"/>
<input type="text" value="Sections"/>
<input type="text" value="02:15 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="sectionsSHS.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"/>
<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 <input type="text" value="0/0/0"/> 📅 To <input type="text" value="0/0/0"/> 📅 <input type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<input type="text"/>
<pre>[1]Student_Number SectionID TermID</pre>
rd)

ATTENDANCE:

Value
<input type="text" value="BASELINE-ATTENDANCE"/>
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"/> 📅 To <input type="text" value="0/0/0"/> 📅
<input checked="" type="radio"/> Send all attendance to date
All current students at the school are automatically sent.
<input type="text"/>
<pre>StudentNumber SchoolID ATT_Code ATT_Date Period</pre>

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	BASILINE-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