

Chancery SMS®

Version 6.5 or higher

Import/Export Guide

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ABOUT CHANCERY SMS

Welcome to Chancery SMS®, a software tool for managing student and family information in your school district.

Support Services Available

A full suite of documentation, online Help, and technical support is available to help you with your day-to-day tasks.

Documentation Included

The following documentation is included with Chancery SMS:

See	For
Chancery SMS Guides	<p>The following guides are available in PDF format on the Installation CD and at our Support web site:</p> <ul style="list-style-type: none"> • District Administration Guide: For district administrators, the District Administration Guide provides instructions on maintaining the centralized Chancery SMS solution, including setting up your district, adding schools to the district, and standardizing data across the district using setup lists. • School Administration Guide: For school administrators, the School Administration Guide provides instructions on maintaining a school and performing administrative tasks. • District User Guide: For district office staff, the District User Guide provides instructions on using Chancery SMS at a district level, including registering and enrolling students and working with student data. • School User Guide: For school staff, the School User Guide provides instructions on using Chancery SMS at the school level, including how to take attendance, enter grades, and work with student data in the office. • Chancery SMS in the Classroom: This guide covers the basics of using Chancery SMS at the homeroom and class level, including how to take attendance, enter grades, and work with student data in the classroom.

See	For
Chancery SMS Speciality Guides	<p>Additional feature-specific guides are available in PDF format on the Installation CD and at our Support web site to supplement the standard guides:</p> <ul style="list-style-type: none"> • School Setup Guide: For school administrators, the School Setup Guide provides instructions on establishing school-wide features, such as buildings and rooms, attendance, and calendars. • Scheduling Guide: For school administrators, the Scheduling Guide covers the process of setting up a school scheduling structure, as well as scheduling in elementary and secondary schools. • Grading Setup Guide: For school administrators, the Grading Setup Guide provides instructions on setting up grading properties and performing grading-related tasks. • Registration and Enrollment Quick Guide: For school and district staff, the Registration and Enrollment Quick Guide provides procedures for registering students in the district and enrolling students in schools. • Address Validation Guide: For school and district administrators, the Address Validation Guide provides instructions on setting up address validation at the district and performing address validation tasks at the district and at schools. • Program Management Guide: For district and school administrators and district and school staff who enroll students and process applications, the Program Management Guide is a feature-specific guide that describes the process of setting up programs at the district and at schools and performing program-related tasks. • Next-Year Preparation and Year-End Processing Guide: For district and school administrators, this guide covers all the steps required to close off the current school year and prepare for the next.
Chancery SMS Technical Guides	<p>Technical guides are available in PDF format on the Installation CD and at our Support web site:</p> <ul style="list-style-type: none"> • cTools Guide (Customization Guide): For district administrators, this guide covers how to create custom student pages, custom panels for existing pages, customization packages, custom reports, and custom setup lists in Chancery SMS. • Import/Export: For district administrators, the Import/Export Guide describes the process for importing and exporting data into and out of Chancery SMS. • Interoperability Guide: For district administrators, the Interoperability Guide covers how to integrate third-party applications with Chancery SMS using SIF and Import/Export functionality. • Report Writer Guide: For district and school administrators and third-party report writers, the Report Writer Guide covers how to plan, build, and upload reports using the new reporting framework. The guide also includes an in-depth examination of this framework, extensive information on how to use Crystal Reports functionality, and reference material on using previous reporting methods.

See	For
Chancery SMS Online Help	Help is always available by accessing the Help menu from the task bar.
Chancery SMS Data Dictionary	The data dictionary contains lists of tables and fields in the district database. It is recommended for the report developer who uses a reporting tool such as Crystal Reports® to retrieve additional information from the district database.
Release Notes	Release Notes are summaries of the new features and changes in the current release.
Installation Documentation	The Installation Guide provides technical details of installing the entire Chancery SMS system for district administrators. Installment Notes are detailed instructions for upgrading from a prior version.

Providing Feedback

To improve the quality of your documentation, we welcome your comments regarding this guide and the online Help. Please email your comments to our Technical Communications Department at user_docs@chancery.com.

Getting Training

Training courses are available to help ensure you get every advantage from your student information system. We are committed to helping you put our solutions to work. Our broad training offerings are designed with you in mind so that you'll receive the most suitable and effective training for your needs.

Choose from on site training, regional workshops, live online training, or Chancery University. We can also create a customized training program to meet your district's needs.

Phone us toll free at 1-800-999-9931 or see the Training area of our Support web site at <http://support.chancery.com> for an up-to-date list of scheduled courses.

Getting Support

The following support programs are available by subscription only:

One-on-one Technical Support	<p>Talk to a technical support analyst to help solve problems and answer questions when software doesn't produce the expected results. Analysts can use the telephone or Internet access to troubleshoot your issues.</p> <p>Monday to Friday, 5 am to 5 pm Pacific Time Phone: 1-800-688-9939 Fax: 1-800-446-5650 Email: techsupp@chancery.com</p>
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Access to our web site	<p>http://support.chancery.com</p> <p>In Chancery SMS, from the Help menu, click Support Website.</p> <p>Our web site includes a searchable KnowledgeBase with frequently asked questions, tips, and troubleshooting instructions, as well as support forums for users to share experience and knowledge.</p>
Software updates	Releases of new versions with improved functions and software updates. Updates are provided free of charge for three months from your date of purchase and are included in the subscription to Support Programs.

For more information on Technical Support Programs, phone Customer Service at 1-800-999-9931.

OVERVIEW OF IMPORT/EXPORT

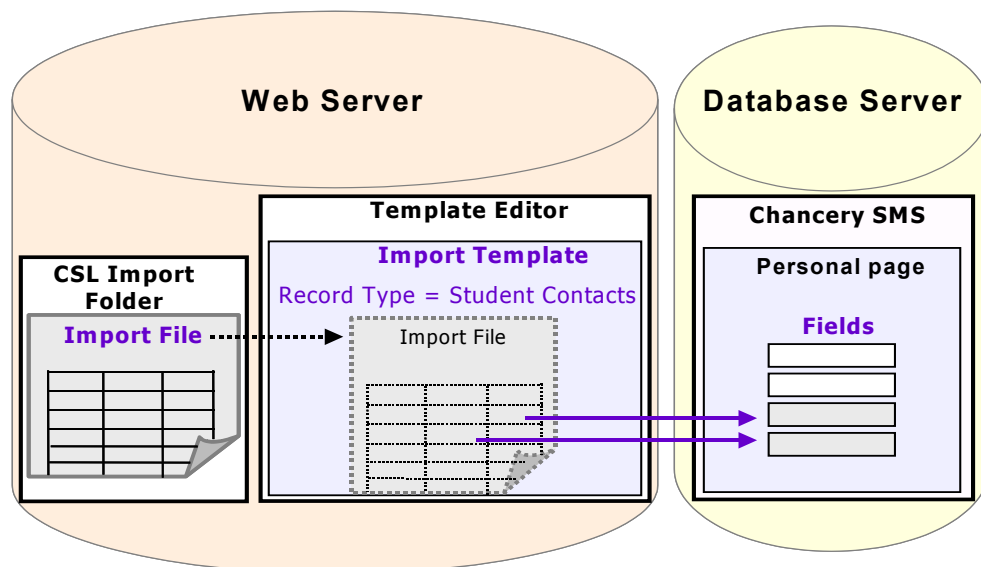
Use Chancery SMS's import and export functionality to move data into and out of the Chancery SMS database. You can import student demographics, courses, test results, and much more into Chancery SMS using an import file and an application that comes with Chancery SMS called Template Editor. For further information about importing, see “About Importing” on page 5 and “Importing Data” on page 9.

You can export data out of almost any field in Chancery SMS by using the export feature and Crystal Reports to create an export template and move the data to an export file. Chancery SMS comes with a variety of file formats to choose from. For further information about exporting, see “About Exporting” on page 6 and “Exporting Data” on page 111.

About Importing

Importing data involves setting up the file that contains the data you want to import into Chancery SMS (the import file) and saving that file to the web server, then creating an import template in Template Editor (a separate program provided with Chancery SMS that runs on the web server) and running or scheduling the import.

The following diagram is an example of the import process:



Template Editor enables you to map the data from your import file to the corresponding fields in Chancery SMS. Template Editor contains “record types” – predefined fields that allow you to import data as a group. Over 20 import record types are available in Template Editor to enable you to import data of various types into the Chancery SMS database. For further information see:

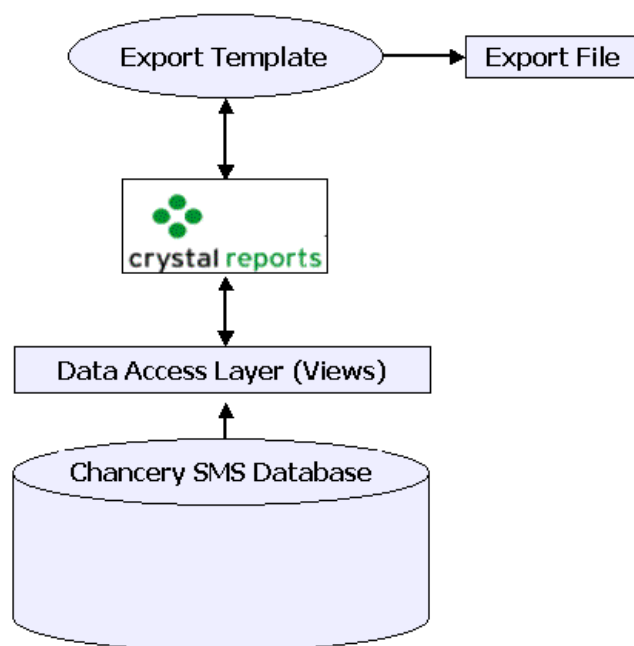
- “Creating an Import Template with Template Editor” on page 13
- “Understanding Record Types” on page 37

You can import data into custom fields that were created with the Custom Data Management (Student Data) feature. Before importing or exporting custom data, you must set up your customizations in Chancery SMS. For further information, see the “Custom Data Management (Student Data)” chapter of the Chancery SMS cTools Guide.

About Exporting

To export data from the Chancery SMS database, you create export templates in Chancery SMS. Creating export templates involves connecting to the database using Data Access Views and Crystal Reports. For further information, see “Creating a Custom Export Template” on page 112.

The following diagram illustrates the export process at a high-level:



Chancery SMS also includes built-in export templates for two third-party applications, Health Office and SETS. For further information, see “Exporting Data Using Built-in Export Templates” on page 130.

IMPORTING DATA

Importing data into Chancery SMS is a three-part process:

- 1 Create or edit an import file that contains the data you want to import. For further information, see “Creating or Editing an Import File” on page 10.
- 2 Create an import template that specifies into which fields the data will be imported. To determine the structure of the import template, you work with an import file and a record type (a predefined list of fields used to group data for importing) in a separate program called Template Editor that comes with Chancery SMS. For further information, see “Creating an Import Template with Template Editor” on page 13.
- 3 Run or schedule the import, using import wizard or import scheduling functionality. For further information, see “Running or Scheduling an Import” on page 27.

Permission to Import

To import data, you need several kinds of permissions:

- You must have permission to add files to the `csl\opendistrictclient\ascii\importfiles` folder on the web server. All files must be placed in this folder before they can be imported into Chancery SMS.
- You need a user name and password that enables you to log on to the Chancery SMS web server so you can run the Template Editor.
- In addition to the above permissions, you need various permissions in Chancery SMS, depending on what type of importing you want to perform:

To	You need this permission	Set to
Create an import template	Import>Template Editor	Yes
Import data using an Address Ranges template	Import>Import Address Ranges	Yes
Import data using a Student Demographic template	Import>Import Student Demographics	Yes
Import data using a Historical template	Transcript/Permanent Record>Import Historical	Yes
Import data using the Student Test Scores template	Import>Import Student Test Scores	Yes

To	You need this permission	Set to
Import data into custom fields created with Custom Data Management (Student Data)	Import>Import Custom Student Data	Yes
Import data using a template that can be scheduled	Import>Schedule Import	Yes

For more information about permissions in Chancery SMS, see “Controlling User Access” in the Chancery SMS District Administration Guide.

Creating or Editing an Import File

The import file serves two purposes: it contains the data you want to import; and you use it to help determine the structure of the template.

The import file may come from another database or system (in which case you may need to edit it) or you may create it using an application such as Microsoft® Excel®.

When creating the import file, ensure that:

- the file format is one that Chancery SMS can accept. See “Available File Formats” on page 10.
- any dates are in the formats required by Chancery SMS. See “Available Date Formats” on page 11.
- any phone numbers are in the formats required by Chancery SMS. See “Available Phone Number Fields and Formats” on page 11.
- any addresses are in a format that Chancery SMS can accept. See “Available Address Fields” on page 12.

When your import file is complete, you must save it as a .txt file and copy it to the `cs/opendistrictclient/ascii/importfiles` folder on the web server.

Available File Formats

Records in the import text file can be in any one of the following formats:

- variable-length, delimited with commas, where each column in the file is separated by a comma
- variable-length, delimited with tabs, where each column in the file is separated by a tab
- fixed-length or Standard Data Format (SDF), where each field takes a specific number of characters

If the file is variable-length, it can also have single or double quotation marks as text qualifiers, which indicate the start and end of text fields or strings.

Each field in Chancery SMS has a maximum number of characters that it can hold; for example, the Language field can have up to 10 characters. If you import data with more characters than the maximum allowed for the specified field, the data is cut off. Before you run the import, it's a good idea to review the import file to ensure data does not exceed the corresponding Chancery SMS field's character limit. For more information about how many characters each field can have, refer to the Chancery SMS Data Dictionary.

Available Date Formats

Before importing a file, ensure all fields with dates in your import file – such as student birthdates – have one of these formats:

Date Formats			
dd/mm/yy	yy/dd/mm	mm/dd/yyyy	ddmmyyyy
dd/yy/mm	ddmmyy	mm/yyyy/dd	yyyymmdd
mm/dd/yy	dd/mm/yyyy	yyyy/dd/mm	yyyy-mm-dd
mm/yy/dd	dd/yyyy/mm	yyyy/mm/dd	m/d/yyyy d/m/yyyy

If the data in the date fields in your import file does not match one of these formats, you must edit it before you can import the data.

Available Phone Number Fields and Formats

You can import phone numbers in templates using several different record types. The following table identifies the fields that are available for phone numbers in all record types except Student Demographics:

Fields Available in Most Phone Numbers		
Type Description	Area Code	Extension
Location Description	Exchange	Listed
Long Distance Code	Suffix	

It's important that all phone numbers in your import file are in one of the following formats:

Phone Number Formats			
5551111	604 555-1111	5551111	604 555-1111
555-1111	1 (604) 555-1111	555-1111	1 (604) 555-1111
(604) 555-1111	1 604 555-1111	(604) 555-1111	1 604 555-1111

If the data in the phone number fields in your import file does not match one of these formats, you must edit it before you can import the data.

Note

International phone number format is not currently supported for importing. If your district uses international phone number format, you will be unable to import phone numbers.

Available Address Fields

You can import many addresses, including those of buildings, students, students' contacts, students' doctors, and staff.

Note

In districts that use the 5-field address format, Apartment Number, Street Number, Street Name, Address Type, and Address Direction for physical address can be imported into any address, but can only be viewed in Chancery SMS. For all other addresses, use Address Line 1 and 2 to import addresses.

The following table identifies the fields available for each address:

Fields Available in All Addresses		
Apartment Number	City Code	Country Code
Street Number	City Description	Country Description
Street Name	County Code	Area Code
Address Type Code	County Description	Area Description
Address Type Description	State Code	Address Line 1
Address Direction Code	State Description	Address Line 2
Address Direction Description	Zip Code	Address format (see note below)

Note

The address format for the district is specified during the installation of Chancery SMS. If your district uses 2-line address format, your import file must indicate this address format by including a column that contains the number "10" beside each address field. You will map this column to the Address Format field in Template Editor when you build the import template. (If your district uses 5-field address format do nothing, as 5-field is the default address format.)

Creating an Import Template with Template Editor

You create import templates in Template Editor, a separate program you use to define the data type, fields, field order, and methods of defining field and record lengths and to map the data in your import file to the corresponding fields in Chancery SMS. The latest version of Template Editor is automatically installed on the web server when you install or upgrade Chancery SMS.

You can create a template once and re-use it for each import file of the same structure. For example, each time you import test results, you can use the same template and simply select a different import file in Template Editor. For information about creating an import file, see “Creating or Editing an Import File” on page 10.

About Record Types in Template Editor

Each import template is based on a specific record type. A record type is a predefined list of fields used to group data for importing. For example, the record type “District Courses” contains fields from the course catalog into which course data can be imported. For further information and a list of the fields in each record type, see “Understanding Record Types” on page 37.

To determine the structure of the template, you select the import file and record type in Template Editor. A different import file and record type are required for each type of data you want to import. There are no predefined templates included with Template Editor – each must be created to meet the specific needs of your district.

Note

To run the Template Editor, you must log on to the Chancery SMS web server.

If the data you want to import is covered by more than one record type, create an import template for each.

Available Record Types

The following table lists the type of data you can import and the record type you use to import that data into Chancery SMS. For detailed information about the fields available in each record type, see “Student Demographics” on page 40.

To Import	Use Record Type
Student personal data such as name, address, phone, birth information, ethnicity and so on	Student Demographics

To Import	Use Record Type
Student contacts and relationship to student.	Student Contacts
Student enrollment information.	School Student
Data used to create schedules for secondary classes.	Class Schedules
Data used to create schedules for secondary students.	Student Schedules
Courses secondary students have requested.	Student Course Requests
All courses in the district.	District Courses Note Only secondary courses can be imported. You cannot currently import elementary subjects.
Address range data to be used to validate student addresses.	Address Ranges
Building names and numbers and the schools they belong to.	Facility Buildings
Room numbers and types and the buildings they are in.	Facility Rooms
Data about the schools secondary students attended in previous years.	Historical Years
The courses secondary students took in previous years.	Historical Courses
The grades secondary students received for courses taken in previous years.	Historical Course Bins
Summary historical data for secondary students, such as total absences, credits, and GPAs	Historical Graduation Information

To Import	Use Record Type
<p>Setup lists data.</p>	<p>Setup Lists</p> <p>You can add new items to any setup list, including:</p> <ul style="list-style-type: none"> • core (or built-in) setup lists • setup lists created using Custom Data Management (CDM) <p>For information about CDM, see the Chancery SMS cTools Guide.</p> <p>You must import items into one setup list at a time. Each setup list requires a separate template.</p> <p>You cannot update existing items in setup lists. You can only add items.</p> <p>You cannot import entirely new lists. You must create a setup list in Chancery SMS before you can import items into it.</p>
<p>Staff names and their login IDs, passwords, and roles.</p>	<p>Staff</p> <p>Note</p> <p>You can import only actual teachers, not the placeholder teachers that are part of secondary scheduling.</p>
<p>Student data into custom fields.</p>	<p>Only data for custom fields that were created with Custom Data Management (Student Data) (CDM) can be imported. The record type you use in the import template depends on how the custom fields were created:</p> <ul style="list-style-type: none"> • If the custom field was built with a basic table on the Student Personal page, use the Student Demographics record type. • If the custom field was built with a basic table and was created for the legacy Test Scores feature, use the Student Test Scores record type. • If the custom field was built with a multi-select list in CDM, use the Student Multi-Select record type. The required fields are Student Number, List Code, and Description. With this record type, you can update information for existing students only. • If the custom field was built with a repeating group in CDM, use the Student Repeating Group record type. The required field is Student Number. With this record type, you can update information for existing students only. • If the custom field was built with a chronological group in CDM, use the Student Chronological record type. The required fields are School Number and Date. With this record type, you can update information for existing students only. <p>For further information about Custom Data Management (Student Data), see the Chancery SMS cTools Guide.</p>

To Import	Use Record Type
Test results.	<p>There are two records for importing test results. Which one you choose depends on how you created your test definitions.</p> <ul style="list-style-type: none"> • If you set up your test definitions using the Legacy Test Scores component, select the record type Student Test Scores. • If you set up your test definitions using the Test Management Component, select the record type Student Test Results. <p>For further information, see “Creating an Import Template with Template Editor” on page 13.</p> <p>Before importing any test results, set up the test definitions and test sessions. For further information, see the Chancery SMS District Administration Guide.</p>

Import Template Types

There are two types of import templates available; templates that use the Import Wizard and templates that use Scheduled Import functionality.

Use the following record types to import data using Import Wizard templates:

- Student Demographics
- Student Test Scores
- Student Multi-select
- CDM Student Repeating Group
- CDM Student Chronological
- Setup Lists

For further information, see “Importing Data Using the Import Wizard” on page 27.

Use the following record types to import data using Scheduled Import templates:

- Address Ranges
- Class Schedules
- District Courses
- Facility Buildings
- Facility Rooms
- Historical Course Bins
- Historical Courses
- Historical Graduation Information
- Historical Years
- School Students
- Staff
- Student Contacts
- Student Course Requests
- Student Schedules
- Student Test Results

For further information, see “Importing Data Using Scheduled Imports” on page 32.

For a description of the data imported for each record type, see “About Record Types in Template Editor” on page 13. For a description of the fields in each record type, see “Fields Supported by Record Types” on page 38.

Navigating in Template Editor

Template Editor consists of six pages that display in the following order:

- 1 “Template Editor” - this is the page from which you create a new import template or edit an existing one.
- 2 “Template Wizard Introduction” - this is the page that lists the steps involved in creating the import template.
- 3 “Select Preview File” - this is the page on which you select the import file.
- 4 “Select Type of Record to Import” - this is the page where you specify the type of records you will be importing.

Note

When you are importing test scores or test results, after you select the record type the Select Standardized Test Score page or Select Test Session page displays. You use these pages to specify the test or test session for which you are importing data.

- 5 “Select File Format” - this is the page where you specify the format of the import file.
- 6 “Match Import Source with Destination Field” - this is the page where you map the data in the import file to the corresponding fields in Chancery SMS.

When you click Next on a Template Editor page, you are moved to the next page. To move to a previous page, click Back.

Click Next to move to the next page in Template Editor.

Click Back to move to the previous page in Template Editor.

Click Cancel to return to the Template Editor page.

The screenshot shows the 'ASCII Import - Chancery Software Ltd.' window. On the left, a blue sidebar contains three buttons: 'Next >', '< Back', and 'Cancel'. Below these buttons, it says 'Template Steps: 1. Select preview file.' The main window area is titled 'Select Type of Record to Import'. It has two sections: 'Record Type:' and 'Record Type Description:'. The 'Record Type:' section is a list box containing: Historical Years, Historical Courses, Historical Course Bins, Staff, Class Schedules, Student Schedules, Student Course Requests, Address Ranges, Student Test Results (highlighted), and Historical Graduation Information. The 'Record Type Description:' section is a text box containing 'Student Test Results'.

Starting the Template Editor and Selecting the Import File

Before you start Template Editor, copy the import file you created or edited in “Creating or Editing an Import File” to the `cs\opendistrictclient/ascii/importfiles` folder on the web server. The import file then becomes available for use in Template Editor.

TO START THE TEMPLATE EDITOR:

- 1 Log on to the Chancery SMS web server.

Note

The user ID and password required to log on to the web server are specific to the machine, and are unrelated to your Chancery SMS user ID and password.

- 2 From the Windows Start menu, click Programs>Chancery SMS>Template Editor.

OR

Navigate to the `cs\opendistrictclient` folder, and double-click `TemplateEditor.exe`.

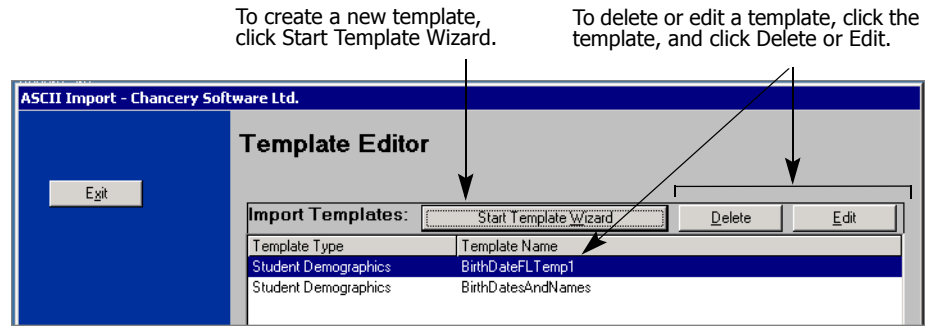
- 3 In the “Chancery SMS ASCII Template Editor Log On” dialog, enter the appropriate User ID and Password.



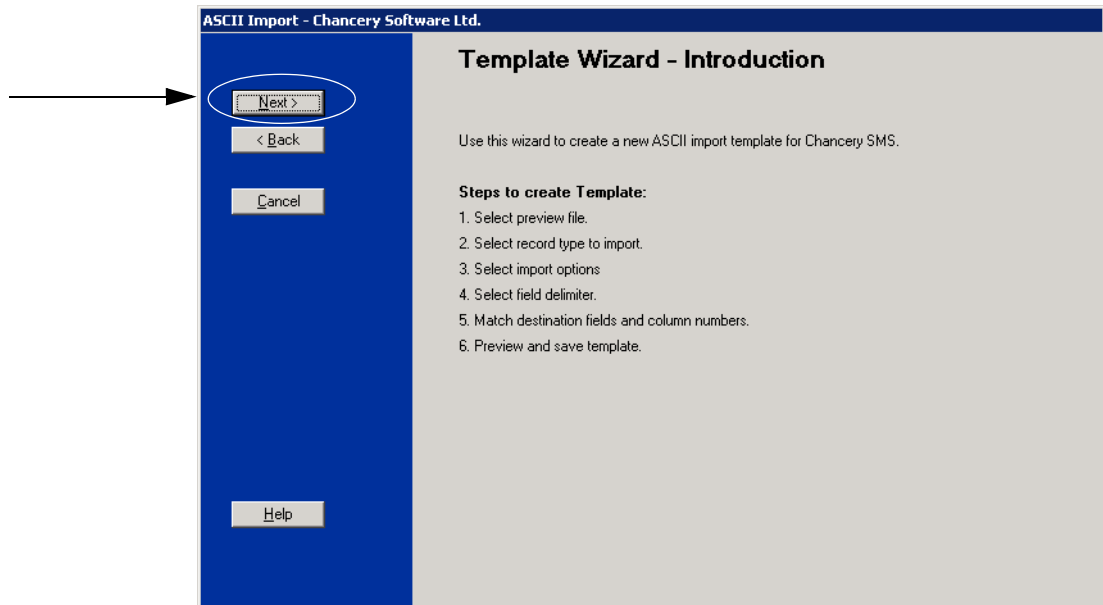
Note

The user ID and password for Template Editor are the same as those for the Chancery SMS database and were set when the database was installed. To change this information, go to Add/Remove Programs, launch the database installer and select “Update Database User Information”. In the Change Database Account Information dialog, enter the new information. **If you change the database user name and password, to ensure the connection is not broken between the database and web server, update the user ID and password in the following file:** `Inetpub\wwwroot\ChancerySMS\sqldataprovider.config`.

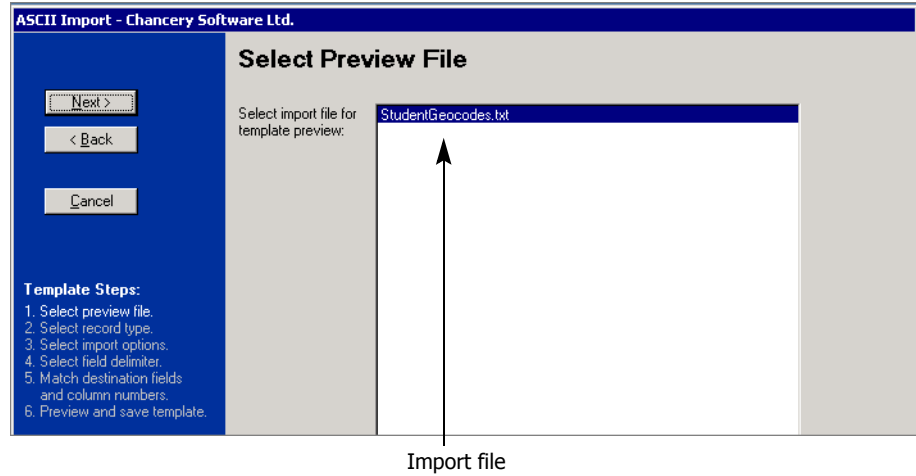
- 4 In the Template Editor, do one of the following:



- 5 On the Template Wizard - Introduction page, click Next.



- 6 On the Select Preview File page, click the import file you will use to create the template.



- 7 Click Next.

The “Select Type Record to Import” page opens.

Specifying a Record Type In Template Editor

Record types contain a list of predefined fields you import as a group. For a description of the available record types, see “About Record Types in Template Editor” on page 13. For further information and a list of the fields in each record type, see “Understanding Record Types” on page 37.

TO SPECIFY A RECORD TYPE IN TEMPLATE EDITOR:

- 1 In the Template Editor, on the “Select Type of Record to Import” page, in the Record Type list, click the record type for the data you want to import.

Note

Dropdowns are available when you select certain record types. For example, if you select the record type "Student Test Results", you can select specific tests from the "Student Test Results - Test Management" dropdown.

When you select a record type, a description of the record type displays.

This applies when the record type is Student Test Scores.

This applies when the record type is Student Multi-Select, CDM Student Repeating Group, or CDM Student Chronological.

This applies when the Record Type is Student Test Results.

This applies when the Record Type is Setup List.

2 If you selected one of the following record types, enter the necessary information as follows:

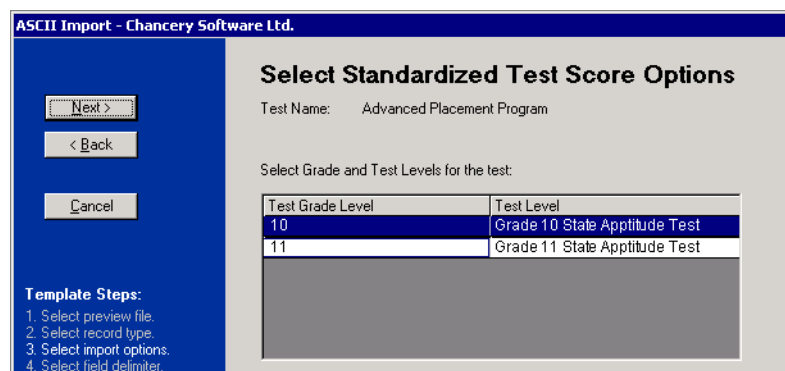
If you selected	Do this
Student Test Scores	Under Standardized Test Score Import - Legacy Test Scores, from the Test Name dropdown, select the name of the test for the test scores you are importing. The names in this dropdown come from the Test Code setup list.
Student Multi-Select, CDM Student Repeating Group, or CDM Student Chronological	Under CDM Import, from the Table Name dropdown, click the name of the multi-select list, repeating group, or chronological group.
Setup Lists	Under Setup Import, in the List Name dropdown, click the name of the setup list for the data you are importing.
Student Test Results	Under Student Test Results - Test Management, from the Test dropdown, select the name of the test for the test results you are importing.

3 Click Next.

OR

Do one of the following:

- If you selected the record type Student Test Scores, the “Select Standardized Test Score Options” page displays. Click the Test Grade Level and the Test Level (or difficulty) that you wan and click Next.

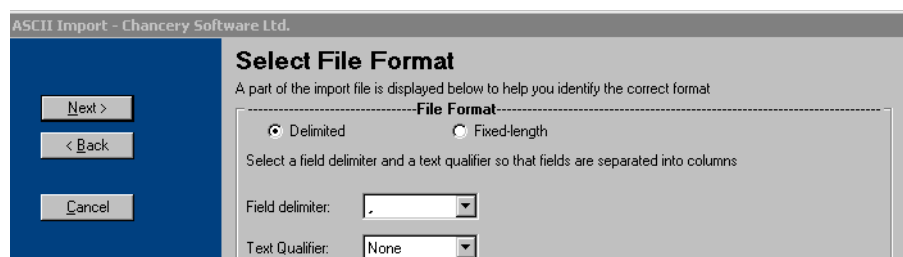


The items shown on the Select Standardized Test Score Options page are the tests that have been added to the Standardized Tests page in Chancery SMS and correspond to the Test Name you selected on the Select Type of Record to Import page.

- If you set the Record Type to Student Test Results, on the Select Test Session page, click the Test Session you want and click Next.

The items shown on the Select Test Session page are the test sessions that have been added in Chancery SMS for the Test you selected on the Select Type of Record to Import page.

The Select File Format page opens.



Selecting a File Format in Template Editor

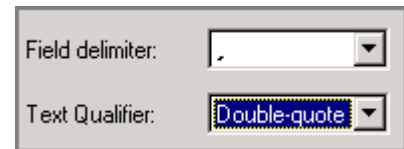
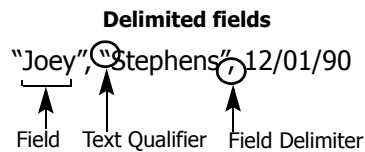
- 1 On the Select File Format page, in the File Format area, select either Delimited or Fixed-Length.



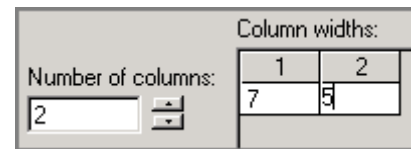
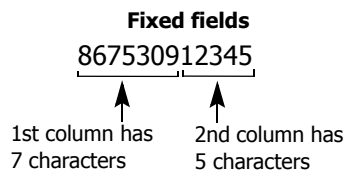
Use the following table as a guideline:

Format	Description	Example
Delimited	Each column in the file is separated by a tab or comma.	“Joey”, “Stephens”, 12/01/90
Fixed-length	Each column in the file has a specific number of characters.	867530912345 7 characters for the Student Number followed by 5 for the Geocode

- 2 Do one of the following:
 - If you chose Delimited, in the Field Delimiter field, select the character that separates fields in the import file. You can choose either a comma or a Tab. In the Text Qualifier field, choose the character that surrounds text fields in the import file – Double Quote, Single Quote, or None.



- If you chose Fixed-Length, under Column Widths, enter the number of characters used by each column. To change the total number of columns, click Number of Columns.



- 3 If the import file starts with a row of headings for each column in the file, select “First Row Has Column Names”.
- 4 Click Re-display As Columns.

The Template Editor provides a partial preview of the fields.

Fixed fields

StudentGeocd
867530912345
867152412346

↓

1. Student	2. Geocd
8675309	12345
8671524	12346

Delimited fields

FirstName, LastName, Birthdate
 "Joey", "Stephens", 12/01/90
 "Sam", "Jones", 10/11/91

↓

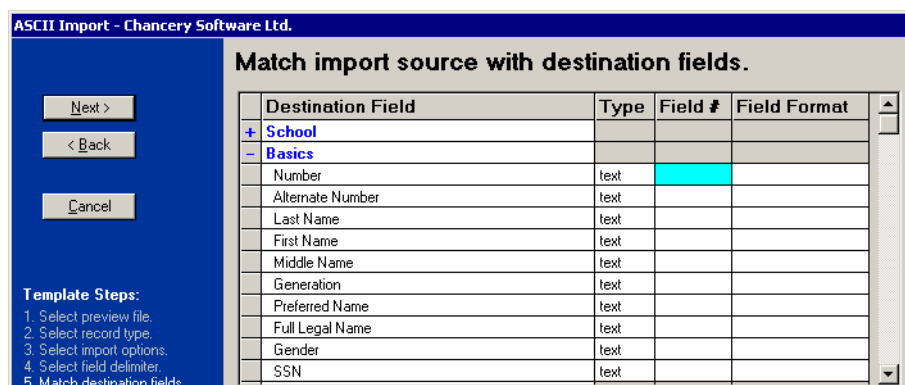
1. FirstName	2. LastName	3. Birthdate
Joey	Stephens	12/01/90
Sam	Jones	10/11/91

When you click Re-display As Columns, the rows are divided into separate fields.

If you selected First Row Has Column Names, the column labels are shown, in addition to the column numbers.

5 Click Next.

The “Match import source with destination fields” page opens.



Matching Source and Destination Fields

In the Template Editor, on the “Match import source with destination fields” page, the fields in your import file display under Partial View of Import File. Consider the specific fields in the Chancery SMS database that you want to import data into, noting that:

- Fields highlighted in blue are required by the import.
Required fields are determined based on what fields are required to update an existing record; additional fields may be required if you are adding a new record. For a list of required fields, see “Understanding Record Types” on page 37.
- Core fields are displayed at the top of the list. For a description of core fields, see “Fields Supported by Record Types” on page 38.
- Custom fields created with Custom Data Management (Student Data) are displayed at the bottom of the list.
- You can click “+” to see fields inside a bold group header. For example, to find Student BirthDate, click “+” next to Demographics.

TO MATCH SOURCE AND DESTINATION FIELDS:

- 1 On the Match import source with destination fields page, for each field in your import file, enter its column number next to its associated destination field.

Blue indicates a required field.

Click the "+" and "-" signs to view and hide the fields inside bold group headers.

Enter the column number next to the field you want to import the data into.

Blue indicates a required field.

- 2 For date, birthdate and phone number fields, select a Field Format.

If the field is a birthdate or phone number, select a format. For information about formats, see "Creating or Editing an Import File"

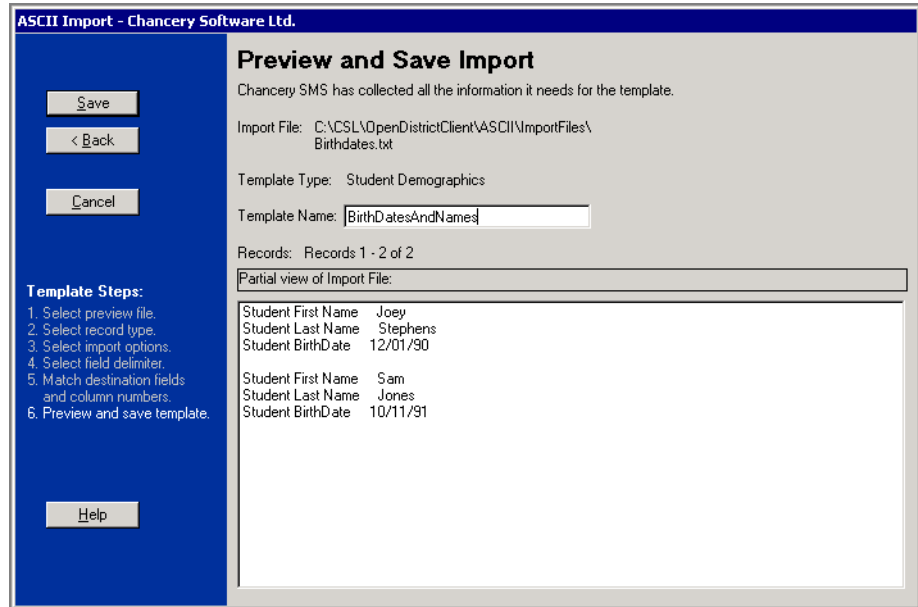
- 3 For any fields with the Type column set to Setup, from the Field Format dropdown, select either Code or Description to identify whether data is imported into the code or description field of each setup list item.

If the field is a setup list, select Code or Description.

Type column.

- 4 Click Next.

- 5 On the Preview and Save Import page, review the partial preview of your imported file.



- 6 If necessary, click Back to modify your settings.
- 7 In the Template Name field, enter a unique template name of up to 30 characters.
- 8 Click Save.
- 9 If you are editing an existing template and you changed the Template Name, confirm whether you want to save over the existing template or save the revised template with a new name.
- 10 Click Exit to close the Template Editor.

Running or Scheduling an Import

You can import data using either the Import Wizard or the Schedule Import feature. Which method you choose depends on the data you want to import. To import Student demographics, setup lists, test scores (legacy only), and CDM data, use the Import Wizard. For all other types of data, use Schedule Import.

Importing Data Using the Import Wizard

Use the Import Wizard to import only student demographic data and student test scores. In other words, use this import method with templates created using the following record types:

- CDM Student Chronological
- CDM Student Repeating Group
- Setup Lists
- Student Demographics
- Student Multi-Select
- Student Test Scores (legacy Tests component only - see note below)

Note

The record type "Student Test Scores" is used to import test results for test definitions that were created using the legacy Tests component. To import test results for test definitions that were created using the Test Management component, use a Scheduled Import. See "Importing Data Using Scheduled Imports" on page 32.

For a description of the fields that correspond to these record types, see "Student Demographics" on page 40.

You cannot use the Import Wizard to import other types of data, such as buildings, courses, or historical information. For these data types, see "Importing Data Using Scheduled Imports" on page 32.

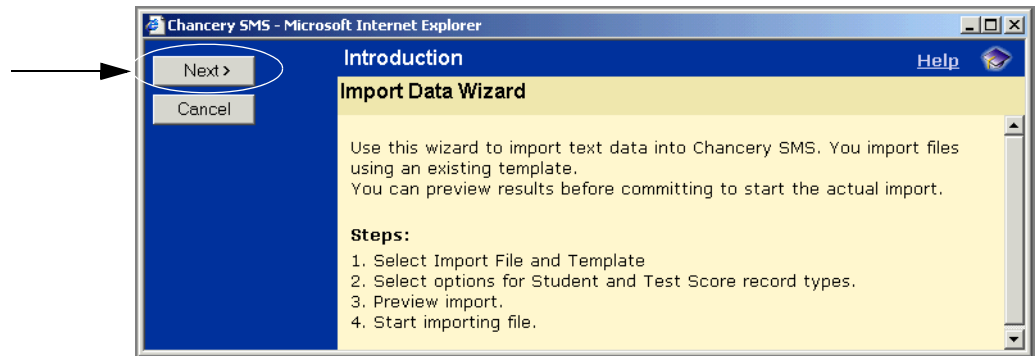
Before you import any file:

- Copy the import file to the `csl/opendistrictclient/ascii/importfiles` folder on the Chancery SMS web server.
- Create a template for the import. See "Creating an Import Template with Template Editor" on page 13.

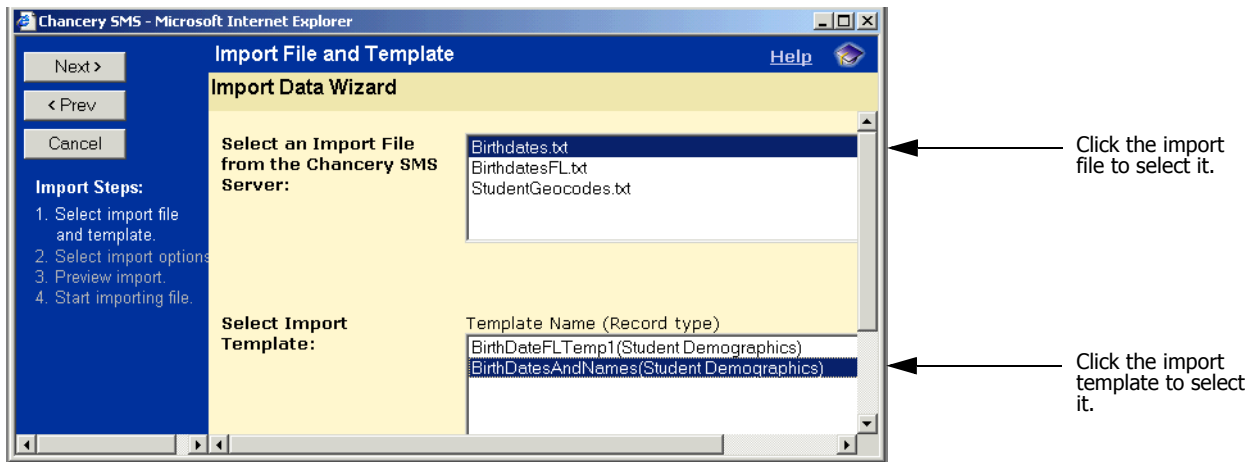
TO IMPORT DATA USING THE IMPORT WIZARD:

- 1 Ensure the file you want to import is in the following location on the Chancery SMS web server, or that the file will be in this location when the import occurs: `csl\opendistrictclient\ascii\importfiles`.

- 2 Log on to Chancery SMS as a district administrator.
- 3 In the control bar, under Admin, click District Setup.
- 4 On the District Setup page, under Tools, click Import.
- 5 On the Chancery SMS Import page, click Start Import Wizard.
- 6 On the Introduction page, click Next.



- 7 On the Import File and Template page, click an import file and a template.



If a template does not exist for the file you are importing, you need to create the template. See “Creating an Import Template with Template Editor” on page 13.

- 8 Click Next.

9 Set options for the import, which depend on the type of data being imported:

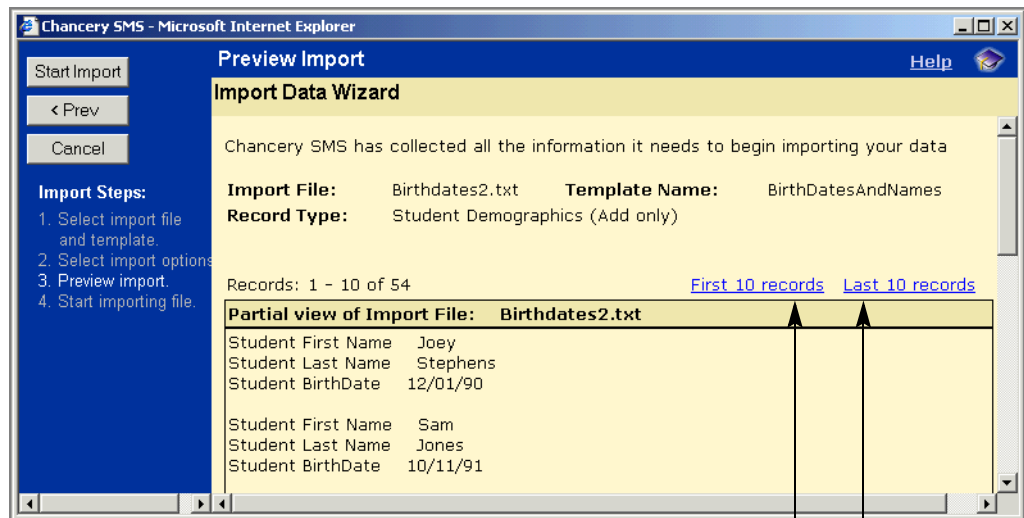
- If you are importing student data, on the Student Record Update Option page, choose one of the following:

To	Do this
Import all records as new records	<ul style="list-style-type: none"> • Click Add new students only. <p>Note If the student number of an import record matches one in Chancery SMS or if the student number field is empty, the record is imported, a new student number is generated, and a warning is created in the Import Error Report page. See "Fixing Errors and Warnings in the Import Wizard" on page 30.</p>
Update only student records that already exist in the database	<ul style="list-style-type: none"> • Click Update existing students only. <p>Note If the student number, first name, last name, and birth date of an import record match those in Chancery SMS, the record is updated, including any blank fields. If they do not match, the record is noted on the Import Errors Report page and is not imported. See "Fixing Errors and Warnings in the Import Wizard" on page 30.</p>

- If you are importing tests, on the Standardized Test Score Options page, under Select Test Session, click the date when the students took the test.

10 Click Next.

11 On the Preview Import page, review the information before importing it.



Click to view the first or last 10 records in the import file

12 Click Start Import.

13 Click OK.

After the import:

- The Import Errors page opens.
- If errors occurred, the records that contain errors are copied to a RESULT file in both the ErrorFiles folder and the ImportFiles folder.
- If warnings occurred, the records that contain warnings are copied to a RESULT file in the ErrorFiles folder.
- The imported file moves to the ArchiveFiles folder in the csl\opendistrictclient\ascii folder on the server.

For information about errors and warnings, see “Fixing Errors and Warnings in the Import Wizard” on page 30.

Fixing Errors and Warnings in the Import Wizard

In the Import Wizard, errors and warnings display for different reasons. Errors occur when the record cannot be imported; for example, when date or phone information is not in the correct format. Warnings occur when a field in your import file has more characters than the corresponding field in Chancery SMS, or if a student number already existed in the database and the import generated a duplicate student number.

TO FIX ERRORS AND WARNINGS:

- 1 After an import, the Import Errors page displays. Review the errors and warnings. If you have more than 10 errors, click Last 10 Errors to view them.

Total Error Records displays the total number of errors, excluding warnings.

Errors/Warnings displays the total number of errors and warnings.

- 2 Navigate to the ImportFiles folder in the csl\opendistrictclient\ascii folder on the server, and locate the file containing the problem records.

Note

Files containing problem records have file names with the format RESULT_ImportedFileName>_MMDDYYYY_nnnnnn.txt where ImportedFileName is the name of the imported file, MMDDYYYY is the month, day, and year, and nnnnnn is an automatically generated number.

- 3 Open the file with a third-party tool, such as Notepad, and fix the problems with the records.

Note

If you are unable to fix the error in the third-party tool, fix it in the original file then resave the file as a text file, using the same name as the original text file.

- 4 Close the Import Data Wizard window.
- 5 Re-run the import. See “Importing Data Using the Import Wizard” on page 27.

Verifying the Import

After you successfully import a file, verify that the information displays correctly in Chancery SMS.

For example, if you imported medical information for a student, open a student’s record and ensure that the Medical section of the Personal page displays the new information you imported.

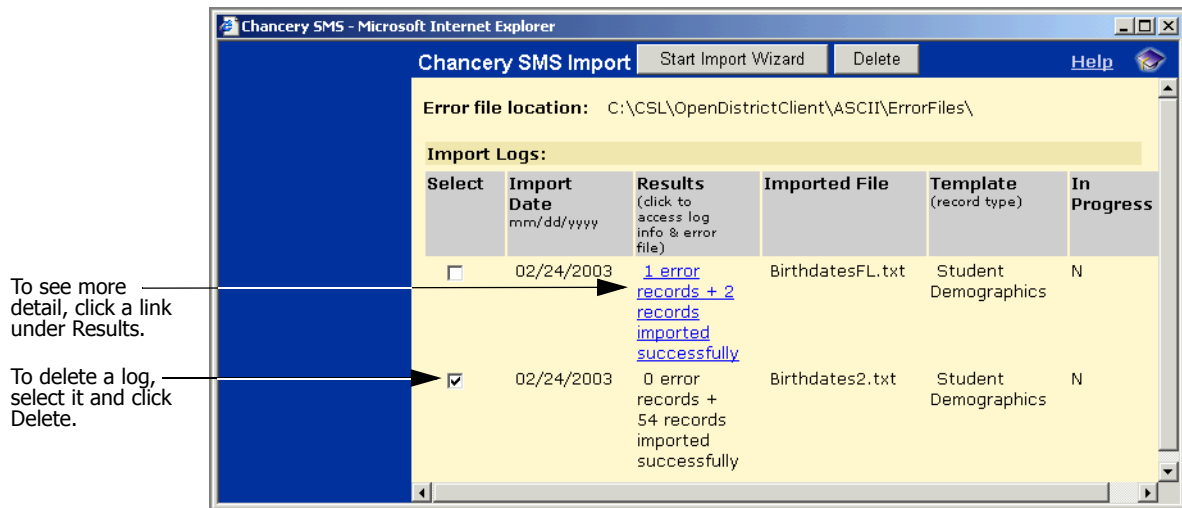
Working with Import Wizard Logs

The import log records information about all imports so that you can view and correct any errors. After the errors are fixed, you can delete the logs.

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Import.

- 3 On the Chancery SMS Import page, in the Import Log panel, do one of the following:

To	Do this
View a log	<ul style="list-style-type: none"> If the text in the Results column is underlined, click the text.
Delete a log	<ol style="list-style-type: none"> Select an import log to delete and click Delete. Click OK.



- 4 Close the window.

Importing Data Using Scheduled Imports

Use scheduled imports to import data that corresponds to templates created using the following record types:

- Student Contacts
- District Courses
- Facility Buildings
- Facility Rooms
- Historical Years
- Historical Courses
- Historical Course Bins
- Staff
- Class Schedules
- Student Schedules
- Student Course Requests
- Address Ranges
- Student Test Results
- Historical Graduation Information

You cannot use scheduled imports to import student demographics, test scores, setup lists, or data created using CDM. For these data types, see “Importing Data Using the Import Wizard” on page 27.

Before you import any file:

- Copy the import file to the `csl\opendistrictclient\ascii\importfiles` folder of the Chancery SMS web server.
- Create a template for the import. See “Creating an Import Template with Template Editor” on page 13.

Each scheduled import is considered a job, which can be run immediately or at a specified time. You can create multiple import jobs, where each job has its own name and timing. Multiple jobs can use the same template, but the import file must have a unique name.

TO SCHEDULE AN IMPORT:

- 1 Ensure the file you want to import is in the following location on the Chancery SMS web server, or that the file will be in this location when the import occurs: `csl\opendistrictclient\ascii\importfiles`.
- 2 Log on to Chancery SMS as a district administrator.
- 3 In the control bar, under Admin, click District Setup.
- 4 Under Tools, click Schedule Import.
- 5 On the Schedule Import page, do one of the following:

To	Do this
Create a scheduled import	<ul style="list-style-type: none"> • From the Actions menu, click Add Scheduled Import.
Change a scheduled import	<ul style="list-style-type: none"> • Click the name of the import job.
Delete a scheduled import	<ol style="list-style-type: none"> 1 Select the checkbox next to the import job. 2 From the Actions menu, click Delete Scheduled Import. 3 Skip the remaining steps.

- 6 On the Add/Edit Scheduled Import page, under General, identify the import as follows:

Field	Description
Job Name	Enter a unique name for the import. If you are performing more than one import, each job name must be different.
File Name	Enter the name of the file you are importing, including the name and extension but not the path. For example, enter “tests123.txt”.
Import Template	Select the template for the file you are importing. You must create this template before scheduling an import. See “Creating an Import Template with Template Editor” on page 13.

Field	Description
Import Option	<p>If the imported data adds new records to Chancery SMS, select “Add new records”.</p> <p>If the imported data changes existing records in Chancery SMS, select “Replace existing records”.</p> <p>Note When you replace existing records, you can only update optional fields. If you try to change any of the required fields, a new record is added.</p>

7 Under Schedule, indicate the timing of the import:

To	Do this
Import the file immediately.	<ul style="list-style-type: none"> Click Run Now.
Import the file once at a specified time.	<ol style="list-style-type: none"> Click One Time. Specify the date and time.
Import the file repeatedly.	<ol style="list-style-type: none"> Click Recurring. Specify the interval and when the import begins.

8 Click OK.

Troubleshooting Scheduled Imports

After a scheduled import runs, one of the following statuses displays on the Schedule Import page:

- Completed - this status indicates that all records were imported
- Completed with Errors - this status indicates that some records were imported
- Failed - this status indicates that no records were imported

Note

Regardless of the status of the scheduled import, the import file is moved to the following folder: CSL\OpenDistrictClient\ASCII\Archive Files.

Errors generated during a scheduled import are written to error logs on the Chancery SMS web server. Which log the error is written to depends on where the error occurred (in the import file or the import template), which is indicated by the status of the import as follows:

- If the status after importing is “Completed with Errors”, there are errors in the import file and the errors display in the following file:
CSL\OpenDistrictClient\ASCII\ErrorFiles.
- If the status after importing is “Failed”, there are errors in the import template and these errors display in the Chancery.TaskManager.Service.Log located in
CSL\OpenDistrictClient\SMS\SMSBusinessObjects\Log.

Correcting Errors in an Import File

- 1 Log on to the Chancery SMS web server.
- 2 Navigate to C:\CSL\OpenDistrictClient\ASCII\ErrorFiles and double-click the .log file.
- 3 Review the error messages.
- 4 Navigate to C:\CSL\OpenDistrictClient\ASCII\ArchiveFiles and make the corrections in the import file based on the messages in the error log.
- 5 Copy the import file from c:\CSL\OpenDistrictClient\ASCII\ArchiveFiles to C:\CSL\OpenDistrictClient\ASCII\ImportFiles.
- 6 Re-run the Scheduled Import. See “Re-running a Scheduled Import” on page 36.

Warning

After you correct errors in an import file, ensure you select the import option “Replace existing records” when you re-run the import. Failure to do so could result in duplicate records in Chancery SMS.

Correcting Errors in an Import Template

- 1 Log on to the Chancery SMS web server.
- 2 Navigate to C:\CSL\OpenDistrictClient\SMS\SMSBusinessObjects\Log and double-click Chancery.TaskManager.Service.log.
- 3 Review the error messages.
- 4 Log on to the Template Editor.
- 5 Select your import template and click Edit.
- 6 Make corrections to the import template, based on the error messages in the Chancery.TaskManager.Service.log.
- 7 Save the import template.

- 8 Re-run the import. See “Re-running a Scheduled Import” on page 36.

Re-running a Scheduled Import

- 1 Log on to Chancery SMS as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under Tools, click the Schedule Import.
- 4 On the Schedule Import page, click the import.
- 5 On the Edit Scheduled Import page, do one of the following:

If the error occurred in	Do this
the import file	Select the import option “Replace existing records”. Warning Ensure you select this option. When there are errors in the import file, records without errors are imported anyway. If you select “Add new records” you could end up with duplicate records in Chancery SMS.
the import template	Select the import option “Add new records”.

- 6 Under Schedule, click Run Now.

Alternative to Import: Using SIF

If you need to import information more than once, consider using SIF, the Schools Interoperability Framework.

Chancery SMS has a SIF agent that enables Chancery SMS to continuously exchange data with other applications.

For information about SIF and the Chancery SMS SIF Agent, see the Chancery SMS SIF Agent Guide.

UNDERSTANDING RECORD TYPES

Template Editor contains a list of predefined fields you import as a group, called “record types”. Each record type consists of only the fields into which data can be imported. For further information about Template Editor, see “Creating an Import Template with Template Editor” on page 13.

The following example shows the record type “Student Demographics”, which contains all the fields for which you can import student demographic data.

Record type "Student Demographics".

Fields for record type "Student Demographics".

Select Type of Record to Import

Record Type: Student Demographics

Record Type Description: Each basic data field stores one per student.

Match import source with destination fields.

Destination Field	Type	Field #	Field Format
Student ID	text		
- Student Personal			
Student Alternate Number	text		
Student State Number	text		
- Name			
Student Name Type	text		
Student Last Name	text		
Student First Name	text		
Student Middle Name	text		
Student Suffix (Generation)	text		
Student Preferred Name	text		
Student Full Name	text		

Fields Supported by Record Types

This section provides detailed information about each record type, including the specific type of data that can be imported. Also included are the steps for navigating to the fields in Chancery SMS that correspond to the record type.

Each record type description provides the following information:

- the name of the import field in Template Editor
- whether data is required or optional for the field when adding data during an import
- whether data is required or optional for the field when updating data during an import
- a description of the field
- the name of the field on the interface
- the name of the schema property and table field in the database

Use the following alphabetical list to find the record type you need:

Record Type	Used to Import:
“Address Ranges” on page 101	Address range data to be used to validate student addresses.
“CDM Student Chronological” on page 52	Data for custom fields built with a chronological group in CDM.
“CDM Student Repeating Group” on page 51	Data for custom fields built with a repeating group in CDM.
“Class Schedules” on page 94	Data used to create schedules for secondary classes.
“District Courses” on page 66	All secondary courses in the district.
“Facility Buildings” on page 70	Building names and numbers and the schools they belong to.
“Facility Rooms” on page 72	Room numbers and types and the buildings they are in.
“Historical Course Bins” on page 85	The grades secondary students received for courses taken in previous years.
“Historical Courses” on page 81	The courses secondary students took in previous years.
“Historical Graduation Information” on page 107	Summary historical data for secondary students, such as total absences, credits, and GPAs.
“Historical Years” on page 75	Data about the schools that secondary students attended in previous years.

Record Type	Used to Import:
“School Students” on page 54	Student enrollment information.
“Setup Lists” on page 53	Core and custom setup list data.
“Staff” on page 89	Staff names and their login IDs, passwords, and roles.
“Student Contacts” on page 62	Student contacts and relationship to student.
“Student Course Requests” on page 99	Courses secondary students have requested.
“Student Demographics” on page 40	Student personal data such as name, address, phone, birth information, ethnicity, and so on.
“Student Multi-select” on page 50	Data for custom fields built with a multi-select list in CDM.
“Student Schedules” on page 97	Data used to create schedules for secondary students.
“Student Test Results” on page 104	Data for test definitions set up using the Test Management Component.
“Student Test Scores” on page 46	Data for test definitions set up using the Legacy Test Scores component.

Student Demographics

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Personal.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student ID	Required	Optional	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters.	Student Number	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. STD_NUMBER</i>
Student Personal					
Student Alternate Number	Optional	Optional	An alternate ID used to uniquely identify a student within the district. It is a maximum of 15 characters.	Alternate Number	DistrictStudent.AlternateNumber <i>CSL_STD_DEMO_DISTRICT. STD_ALTERNATE_NUMBER</i>
Student State Number	Optional	Optional	A unique number to identify the student for the state. It is a maximum of 20 characters. For Tennessee EIS, use the record type “TN Student State Number”, not the Student Demographics record type to import data into this field. For further information, see the Tennessee Student State Number Import Addendum.	State Number	DistrictStudent.StateNumber <i>CSL_STD_DEMO_DISTRICT. STD_STATE_NUMBER</i>
Student Personal>Name					
Student Name Type	Optional	Optional	No longer used.	N/A	N/A
Student Last Name	Required	Required	The student’s last name. It is maximum of 31 characters.	Last Name	DistrictStudent.LastName <i>CSL_STD_DEMO_DISTRICT. LAST_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student First Name	Required	Required	The student's first name. It is maximum of 31 characters.	First Name	DistrictStudent.FirstName <i>CSL_STD_DEMO_DISTRICT. FIRST_NAME</i>
Student Middle Name	Optional	Optional	The student's middle name. It is maximum of 31 characters.	Middle Name	DistrictStudent.MiddleName <i>CSL_STD_DEMO_DISTRICT. MIDDLE_NAME</i>
Student Suffix (Generation)	Optional	Optional	The suffix of a student's name, if the student shares the same name as previous generations (e.g., John Smith III). It is a maximum of 4 characters.	Generation	DistrictStudent.Generation <i>CSL_STD_DEMO_DISTRICT. LINEAGE</i>
Student Preferred Name	Optional	Optional	The student's preferred name. It is a maximum of 31 characters.	Preferred Name	DistrictStudent.PreferredName <i>CSL_STD_DEMO_DISTRICT. PREFERRED_NAME</i>
Student Full Name	Optional	Optional	The student's full legal name, if it differs from the concatenation of the other name fields. It is a maximum of 53 characters.	Full Legal Name	DistrictStudent.FullName <i>CSL_STD_DEMO_DISTRICT. LEGAL_FULL_NAME</i>
Student Sort Name	Optional	Optional	No longer used.	N/A	N/A
Student Personal>Phone Number					
Student Phone 1-6	Optional	Optional	Up to 6 sets of phone number fields for the student. See "Available Phone Number Fields and Formats" on page 11.	Phone Numbers	StudentPhone <i>CSL_STD_PHONE_NUMBER</i> Note Data is stored in multiple properties/fields in this schema/table.
Student Social Insurance/Security ID Number	Optional	Optional	The student's social security (U.S.) or social insurance (Canada) number. It is a maximum of 13 characters.	Social Security #	DistrictStudent.SSN <i>CSL_STD_DEMO_DISTRICT. SOCIAL_SECURITY_NUMBER</i>
Demographics					
Student Gender	Optional	Optional	The student's gender, either M (male) or F (female).	Gender	DistrictStudent.Gender <i>CSL_STD_DEMO_DISTRICT. GENDER</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student BirthDate	Required	Optional	The student's date of birth in the appropriate date format. Refer to "Available Date Formats" on page 11.	Birthdate	DistrictStudent.BirthDate <i>CSL_STD_DEMO_DISTRICT.BIRTH_DATE</i>
Student Place of Birth	Optional	Optional	The student's place of birth. It is a maximum of 29 characters.	Birthplace	DistrictStudent.BirthPlace <i>CSL_STD_DEMO_DISTRICT.BIRTH_PLACE</i>
Student Birth Certificate on File?	Optional	Optional	Indicates whether a copy of the student's birth certificate is on file, either Y (yes) or N (no).	Birth Cert. on file	DistrictStudent.BirthCertOnFile <i>CSL_STD_DEMO_DISTRICT.HAVE_BIRTH_CERTIFICATE</i>
Student Language	Optional	Optional	The language spoken in the student's home. It is a code of a maximum of 4 characters or a description of a maximum of 35 characters.	Home Language	Language.Code or Description <i>CSL_SET_LANGUAGE.LANGUAGE_CODE or DESC</i>
Student Ethnicity	Optional	Optional	The student's ethnic category. It is a code of a maximum of 4 characters or a description of a maximum of 35 characters.	Ethnic Category	EthnicCategory.Code or Description <i>CSL_SET_ETHNIC_CATEGORY.ETHNIC_CATEGORY_CODE or DESC</i>
Student Federal Ethnicity	Optional	Optional	The student's federal ethnic category. It is a code of a maximum of 4 characters or a description of a maximum of 45 characters.	Federal Ethnic Category	FederalEthnicCategory.Code or Description <i>CSL_SET_FEDERAL_ETHNICITY.FEDERAL_ETHNICITY_CODE or DESC</i>
Student Email Address	Optional	Optional	The student's email address. It is a maximum of 70 characters.	Email address	DistrictStudent.EmailAddress <i>CSL_STD_DEMO_DISTRICT.EMAIL</i>
Student Address>Student Physical Address>Street					
Student Physical Address Format and 14 Physical Address fields	Optional	Optional	The student's physical address. Because the physical address is used for address validation, the required fields depend on which address format the district supports: 2-line or 5-field. See "Available Address Fields" on page 12.	Physical Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student Geocode	Optional	Optional	The geocode used for the student for districts that use the geocode map to determine the student's school for the next year. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Geocode	Geocode.Code or Description <i>CSL_SET_GEOCODE.</i> <i>GEOCODE_CODE or DESC</i>
Student Address>Student Mailing Address>Street					
Student Mailing Address Format and 14 Mailing Address fields	Optional	Optional	The student's mailing address, if it differs from the physical address. See "Available Address Fields" on page 12.	Mailing Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Student Medical Number	Optional	Optional	The student's medical number for insurance purposes. It is a maximum of 13 characters.	Medical Number	DistrictStudent.MedicalNumber <i>CSL_STD_DEMO_DISTRICT.</i> <i>MEDICAL_NUMBER</i>
Student Medical Alert Message	Optional	Optional	Any medical alert message for the student. It is a maximum of 254 characters.	Medical Alert	DistrictStudent.MedicalAlert <i>CSL_STD_DEMO_DISTRICT.</i> <i>MEDICAL_ALERT</i>
Student Legal Alert Message	Optional	Optional	Any legal alert message for the student. It is a maximum of 121 characters.	Legal Alert	DistrictStudent.LegalAlert <i>CSL_STD_DEMO_DISTRICT.</i> <i>LEGAL_ALERT</i>
Student Grad Year	Optional	Optional	The year the student graduated.	N/A	SchoolStudent.GraduationYear <i>CSL_STD_DEMO_SCHOOL.</i> <i>GRADUATION_YEAR</i>
District Registration					
Student Type	Optional	Optional	No longer used.	N/A	N/A
Home School	Optional	Optional	The school the student is assigned to for reporting purposes. It is a code of a maximum of 9 characters or a description of a maximum of 51 characters.	Home School	SchoolName.Code or Description <i>CSL_SET_SCHOOL_NAME.</i> <i>SCHOOL_NAME_CODE or DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Projected School					
Projected School Name	Optional	Optional	The school the student will be transferred to as part of the Next-Year Preparation process.	Zoned School	School.Name <i>CSL_VW_SCHOOL_INFO. SCHOOL_DESC</i>
Projected School ID	Optional	Optional	The ID of the school the student will be transferred to as part of the Next-Year Preparation process.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO. SCHOOL_CODE</i>
Projected School License Number	Optional	Optional	The license number of the school the student will be transferred to as part of the next-year prep process.	N/A	School.LicenseNumber <i>CSL_VW_SCHOOL_INFO. CSL_LICENSE_NUMBER</i>
Registration Grade	Optional	Optional	The student's grade at the time they entered the district.	Registration Grade	GradeLevel.Code <i>CSL_SET_GRADE_LEVEL. GRADE_LEVEL_CODE</i>
Student Medical					
Disability	Optional	Optional	Any disability the student might have. It is a maximum of 17 characters.	Disability	DistrictStudent.DisabilityCode <i>CSL_STD_DEMO_DISTRICT. DISABILITY_CODE</i>
Permission to Call Doctor?	Optional	Optional	A checkbox that indicates whether the school/district has permission to call the student's doctor in emergency situations, either Y (yes) or N (no).	Call Doctor	DistrictStudent.CanCallDoctor <i>CSL_STD_DEMO_DISTRICT. CAN_CALL_DOCTOR</i>
Permission to Call Ambulance?	Optional	Optional	A checkbox that indicates whether the school/district has permission to call for an ambulance in emergency situations, either Y (yes) or N (no).	Call Ambulance	DistrictStudent.CanCallAmbulance <i>CSL_STD_DEMO_DISTRICT. CAN_CALL_AMBULANCE</i>
Permission to Treat Injuries?	Optional	Optional	A checkbox that indicates whether the school/district has permission to treat the student in emergency situations, either Y (yes) or N (no).	Treat	DistrictStudent.CanTreatMedical <i>CSL_STD_DEMO_DISTRICT. CAN_TREAT_MEDICAL</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student Medical>Doctor					
Doctor Name	Optional	Optional	The name of the student's doctor. It is a maximum of 53 characters.	Doctor's Name	DistrictStudent.DoctorName <i>CSL_STD_DEMO_DISTRICT. DOCTOR_NAME</i>
Student Medical>Doctor>Phone Number					
Doctor Phone Numbers 1 to 2	Optional	Optional	Up to 2 sets of phone number fields for the student's doctor. See "Available Phone Number Fields and Formats" on page 11.	Doctor's Phone	DoctorPhone <i>CSL_STD_DOCTOR_PHONE</i> Note Data is stored in multiple properties/fields in this schema/table.
Student Medical>Doctor>Doctor Address					
Doctor Address Format and 14 address fields	Optional	Optional	The address of the student's doctor. See "Available Address Fields" on page 12.	Doctor's Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Custom data	N/A	Optional	You can import into any custom fields added using a basic table in Custom Data Management (Student Data). For further information, see the Chancery SMS cTools Guide.	N/A	N/A

Student Test Scores

Note

To access Test Score pages, on the District Preferences page, in the General panel, ensure "Disable Legacy Test Component" is not selected.

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Tests.
- 5 In the All Tests for Student dialog, click Add.

OR

Click the date link for one of the records. In the Test Results dialog, click Edit.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student ID	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT_NUMBER</i>
Test Session>Test Score Information					
Student Grade Level	Optional	Optional	The student's grade level at the time of the test.	Student's Grade Level	GradeLevel.Code or Description <i>CSL_SET_GRADE_LEVEL_GRADE_LEVEL_CODE or DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Test Session>School					
School ID	Optional	Optional	The ID of the school the student attended at the time of the test. It is a maximum of 9 characters.	School at Time of Test	School.Number <i>CSL_VW_SCHOOL_INFO.SCHOOL_CODE</i>
School Name	Optional	Optional	The name of the school the student attended at the time of the test. It is a maximum of 51 characters.	School at Time of Test	School.Name <i>CSL_VW_SCHOOL_INFO.SCHOOL_DESC</i>
Test Overall Score	Optional	Optional	The student's overall score for the test. It is a maximum of 10 characters.	Overall Score	StudentTestScore.OverallScore <i>CSL_STD_TEST_SCORE.OVERALL_SCORE</i>
Test Overall Score Type	Optional	Optional	The type of overall score for the test. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Overall Score Type	TestScoreType.Code <i>CSL_SET_TEST_SCORE_TYPE.TEST_SCORE_TYPE_CODE</i>
Test Session>Exclusion Reason					
Test Exclusion Reason	Optional	Optional	The type of overall score for the test. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Test Exclusion Code	TestExclusion.Code <i>CSL_SET_TEST_EXCLUSION.TEST_EXCLUSION_CODE</i>
Test Exclusion Reason Other Reason	Optional	Optional	A description of the test exclusion reason. It is a maximum of 50 characters.	Test Exclusion Reason	StudentTestScore.ExclusionReason <i>CSL_STD_TEST_SCORE.TEST_EXCLUSION</i>
Test Interpretation Code	Optional	Optional	The interpretation code for the test. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Interpretation Code	Interpretation.Code <i>CSL_SET_INTERPRETATION.INTERPRETATION_CODE or DESC</i>
Test Incomplete Participation	Optional	Optional	The incomplete participation code for the test. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Incomplete Participation	IncompletePart.Code <i>CSL_SET_INCOMP_PART.INCOMP_PART_CODE or DESC</i>
Subtest>Score Types					
Scaled Score	Optional	Optional	The scaled score for the subtest. It is a maximum of 10 characters.	Scaled Score	StudentSubTestScore.ScaledScore <i>CSL_STD_SUBTEST_SCORE.SCALED_SCORE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Grade Equivalent Score	Optional	Optional	The grade equivalent for the subtest. It is a maximum of 10 characters.	Grade Equivalent	StudentSubTestScore.GradeEquivalent <i>CSL_STD_SUBTEST_SCORE. GRADE_EQUIV</i>
Standard Score	Optional	Optional	The standard score for the subtest. It is a maximum of 10 characters.	Standard Score	StudentSubTestScore.StandardScore <i>CSL_STD_SUBTEST_SCORE. STANDARD_SCORE</i>
Raw Score	Optional	Optional	The raw score for the subtest. It is a maximum of 10 characters.	Raw Score	StudentSubTestScore.RawScore <i>CSL_STD_SUBTEST_SCORE. RAW_SCORE</i>
Percent Score	Optional	Optional	The percent of items correct for the subtest. It is a maximum of 10 characters.	Percent of Items Correct	StudentSubTestScore.PercentScore <i>CSL_STD_SUBTEST_SCORE. PERCENT_SCORE</i>
Mastery Score	Optional	Optional	The mastery score for the subtest. It is a maximum of 10 characters.	Mastery Score	StudentSubTestScore.MasteryScore <i>CSL_STD_SUBTEST_SCORE. MASTERY_SCORE</i>
Adjective Classification Score	Optional	Optional	The adjective classification for the subtest. It is a maximum of 80 characters.	Adjective Classification	StudentSubTestScore. AdjectiveClassification <i>CSL_STD_SUBTEST_SCORE. ADJ_CLASSIFICATION</i>
Stanine Score	Optional	Optional	The numeric stanine score for the subtest.	Stanine	StudentSubTestScore.Stanine <i>CSL_STD_SUBTEST_SCORE. STANINE</i>
Percentile Score	Optional	Optional	The numeric percentile score for the subtest.	Percentile	StudentSubTestScore.Percentile <i>CSL_STD_SUBTEST_SCORE. PERCENTILE</i>
Normal Curve Equivalent Score	Optional	Optional	The numeric normal curve equivalent for the subtest.	Normal Curve Equivalent	StudentSubTestScore. NormalCurveEquivalent <i>CSL_STD_SUBTEST_SCORE. NORM_CURVE_EQUIV</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Equated Score	Optional	Optional	The equated score for the subtest. It is a maximum of 10 characters.	Equated Score	StudentSubTestScore.EquatedScore <i>CSL_STD_SUBTEST_SCORE. EQUATED_SCORE</i>
Locally Defined Score	Optional	Optional	The locally defined score for the subtest. It is a maximum of 10 characters.	Locally Defined Score	StudentSubTestScore.LocallyDefinedScore <i>CSL_STD_SUBTEST_SCORE. LOCAL_DEFINE_SCORE</i>
Subtest>Exclusion Reason					
Exclusion Reason	Optional	Optional	The code for the test exclusion reason for the subtest. It is a maximum of 11 characters.	Test Exclusion Reason	TestExclusion.Code <i>CSL_SET_TEST_EXCLUSION. TEST_EXCLUSION_CODE</i>
Exclusion Reason Other Reason	Optional	Optional	A text description of the test exclusion reason for the subtest. It is a maximum of 50 characters.	Test Exclusion Reason – Other	StudentSubTestScore.ExclusionReason <i>CSL_STD_SUBTEST_SCORE. TEST_EXCLUSION</i>
Interpretation Code	Optional	Optional	The interpretation code for the subtest. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Interpretation Code	Interpretation.Code or Description <i>CSL_SET_INTERPRETATION. INTERPRETATION_CODE or DESC</i>
Incomplete Participation	Optional	Optional	The incomplete participation code for the subtest. It is a code of a maximum of 11 characters or a description of a maximum of 45 characters.	Incomplete Assessment/Test	IncompletePart.Code or Description <i>CSL_SET_INCOMP_PART. INCOMP_PART_CODE or DESC</i>

Student Multi-select

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district or school administrator.
- 2** Search for a student record.
- 3** On the Student Search Results page, click the link for the student.
- 4** On the Student Demographics page, in the control bar, click the link for the appropriate custom data page.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property <i>Table.Field</i>
Student ID	N/A	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Custom data	N/A	Optional	You can import into any custom fields added using a multi-select list in Custom Data Management (Student Data). For further information see the Chancery SMS cTools Guide. The required fields are Student Number and List Code or Description.	N/A	N/A

CDM Student Repeating Group

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district or school administrator.
- 2** Search for a student record.
- 3** On the Student Search Results page, click the link for the student.
- 4** On the Student Demographics page, in the control bar, click the link for the appropriate custom data page.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student ID	N/A	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Custom data	N/A	Optional	You can import into any custom fields added using a repeating group in Custom Data Management (Student Data). The required field is Student Number. For further information, see the Chancery SMS cTools Guide.	N/A	N/A

CDM Student Chronological

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district or school administrator.
- 2** Search for a student record.
- 3** On the Student Search Results page, click the link for the student.
- 4** On the Student Demographics page, in the control bar, click the link for the appropriate custom data page.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property <i>Table.Field</i>
Student ID	N/A	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Custom data	N/A	Optional	You can import into any custom fields added using a chronological group in Custom Data Management (Student Data). The required fields are School Number and Date. For further information, see the Chancery SMS cTools Guide.	N/A	N/A

Setup Lists

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under District, click Setup Lists.
- 4 In the Setup Lists dialog, click the link for a setup list.
- 5 In the Setup List Items dialog, click the link for a setup list item.

Note

Each new setup list has an associated schema and table. The location in which this data is stored will change based on the setup list(s) you are importing.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Code	Required	Optional	The code for the setup list item. It is a maximum of 4 characters.	Short Code	<SetupListName>.Code CSL_SET_<SETUPLISTNAME>. SETUPLISTNAME_CODE
Description	Required	Required	The description of the setup list item. It is a maximum of 29 characters.	Description	<SetupListName>.Description CSL_SET_<SETUPLISTNAME>. SETUPLISTNAME_DESC
State Eq Code	Optional	Optional	The equivalent state code for the setup list item. It is a maximum of 10 characters.	State Short Code	<SetupListName>.StateCode CSL_SET_<SETUPLISTNAME>. STATE_EQ_CODE
State Eq Description	Optional	Optional	The equivalent state description of the setup list item. It is a maximum of 50 characters.	State Description	<SetupListName>.StateDescription. CSL_SET_<SETUPLISTNAME>. STATE_EQ_DESC

School Students

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Personal.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School					
School Number	Required	Required	An ID used to uniquely identify a school within the district. This field is used to select the school the student is assigned to. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO.</i> <i>SCHOOL_CODE</i>
Basics					
Number	Required	Required	An ID used to uniquely identify a student within a district. It is a maximum of 15 characters.	Student Number	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT.</i> <i>STD_NUMBER</i>
Alternate Number	Optional	Optional	An alternate ID used to uniquely identify a student within a district. It is a maximum of 15 characters.	Alternate Number	DistrictStudent.AlternateNumber <i>CSL_STD_DEMO_DISTRICT.</i> <i>STD_ALTERNATE_NUMBER</i>
Last Name	Optional	Optional	The student's last name. It is maximum of 31 characters.	Last Name	DistrictStudent.LastName <i>CSL_STD_DEMO_DISTRICT.</i> <i>LAST_NAME</i>
First Name	Optional	Optional	The student's first name. It is maximum of 31 characters.	First Name	DistrictStudent.FirstName <i>CSL_STD_DEMO_DISTRICT.</i> <i>FIRST_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Middle Name	Optional	Optional	The student's middle name. It is maximum of 31 characters.	Middle Name	DistrictStudent.MiddleName <i>CSL_STD_DEMO_DISTRICT.MIDDLE_NAME</i>
Generation	Optional	Optional	The suffix of a student's name, if the student shares the same name as previous generations (e.g., John Smith III). It is a maximum of 4 characters.	Generation	DistrictStudent.Generation <i>CSL_STD_DEMO_DISTRICT.LINEAGE</i>
Preferred Name	Optional	Optional	The student's preferred name. It is a maximum of 31 characters.	Preferred Name	DistrictStudent.PreferredName <i>CSL_STD_DEMO_DISTRICT.PREFERRED_NAME</i>
Full Legal Name	Optional	Optional	The student's full legal name, if it differs from the concatenation of the other name fields. It is a maximum of 53 characters.	Full Legal Name	DistrictStudent.FullName <i>CSL_STD_DEMO_DISTRICT.LEGAL_FULL_NAME</i>
Gender	Optional	Optional	The student's gender, either M (male) or F (female).	Gender	DistrictStudent.Gender <i>CSL_STD_DEMO_DISTRICT.GENDER</i>
SSN	Optional	Optional	The student's social security (U.S.) or social insurance (Canada) number. It is a maximum of 13 characters.	Social Security #	DistrictStudent.SSN <i>CSL_STD_DEMO_DISTRICT.SOCIAL_SECURITY_NUMBER</i>
Basics>Phones					
Phone 1 to 6	Optional	Optional	Up to 6 sets of phone number fields for the student. See "Available Phone Number Fields and Formats" on page 11.	Phone Numbers	StudentPhone <i>CSL_STD_PHONE_NUMBER</i> Note Data is stored in multiple properties/fields in this schema/table.
Demographics					
Birth Date	Optional	Optional	The student's date of birth in the appropriate date format. Refer to "Available Date Formats" on page 11.	Birthdate	DistrictStudent.BirthDate <i>CSL_STD_DEMO_DISTRICT.BIRTH_DATE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Birth Place	Optional	Optional	The student's place of birth. It is a maximum of 29 characters.	Birthplace	DistrictStudent.BirthPlace <i>CSL_STD_DEMO_DISTRICT. BIRTH_PLACE</i>
Birth Certificate On File	Optional	Optional	Indicates whether a copy of the student's birth certificate is on file, either Y (yes) or N (no).	Birth Cert.on file	DistrictStudent.BirthCertOnFile <i>CSL_STD_DEMO_DISTRICT. HAVE_BIRTH_CERTIFICATE</i>
Home Language Code	Optional	Optional	The code for the language spoken in the student's home. It is a maximum of 4 characters.	Home Language	Language.Code <i>CSL_SET_LANGUAGE. LANGUAGE_CODE</i>
Home Language Description	Optional	Optional	The description of language spoken in the student's home. It is a maximum of 35 characters.	Home Language	Language.Description <i>CSL_SET_LANGUAGE. LANGUAGE_DESC</i>
Lunch Status Code	Optional	Optional	The code for the student's eligibility for free or reduced-price lunches. It is a maximum of 4 characters.	Lunch Status	Lunch.Code <i>CSL_SET_LUNCH.LUNCH.CODE</i>
Lunch Status Description	Optional	Optional	The description of the student's eligibility for free or reduced-price lunches. It is a maximum of 35 characters.	Lunch Status	Lunch.Description <i>CSL_SET_LUNCH.LUNCH.DESC</i>
Ethnic Category Code	Optional	Optional	The code for the student's ethnic category. It is a maximum of 4 characters.	Ethnic Category	EthnicCategory.Code <i>CSL_SET_ETHNIC_CATEGORY. ETHNIC_CATEGORY_CODE</i>
Ethnic Category Description	Optional	Optional	The description of the student's ethnic category. It is a maximum of 35 characters.	Ethnic Category	EthnicCategory.Description <i>CSL_SET_ETHNIC_CATEGORY. ETHNIC_CATEGORY_DESC</i>
Demographics>Federal					
Federal Ethnic Category Code	Optional	Optional	The code for the student's federal ethnic category. It is a maximum of 4 characters.	Federal Ethnic Category	FederalEthnicCategory.Code <i>CSL_SET_FEDERAL_ETHNICITY. FEDERAL_ETHNICITY_CODE</i>
Federal Ethnic Category Description	Optional	Optional	The description of the student's federal ethnic category. It is a maximum of 45 characters.	Federal Ethnic Category	FederalEthnicCategory.Description <i>CSL_SET_FEDERAL_ETHNICITY. FEDERAL_ETHNICITY_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Federal Race 1 to 5	Optional	Optional	The federal races to which the student belongs, up to 5. It is a code of a maximum of 4 characters or a description of a maximum of 35 characters.	Federal Race Categories	StudentFederalRace.Code or Description <i>CSL_STD_FEDERAL_RACE.</i> <i>FEDERAL_RACE_CODE or DESC</i>
Registration					
Enrollment Status	Optional	Optional	The description of the student's enrollment status. It is a maximum of 49 characters and must be a valid item from the setup list.	Enrollment Status	EnrollmentStatus.Description <i>CSL_ADM_ENROLLMENT_STATUS.</i> <i>ENROLLMENT_STATUS_DESC</i>
Registration Status	Optional	Optional	The student's registration status. It is a code of a maximum of 5 characters or a descriptions of a maximum of 29 characters.	Registration Status	RegistrationStatus.Code or Description <i>CSL_SET_REGISTRATION_STATUS.</i> <i>REGISTRATION_STATUS_CODE or DESC</i>
Home School Code	Optional	Optional	The code for the school that the student is assigned to for reporting purposes. It is a maximum of 9 characters.	Home School	SchoolName.Code <i>CSL_SET_SCHOOL_NAME.</i> <i>SCHOOL_NAME_CODE</i>
Home School Description	Optional	Optional	The description of the school that the student is assigned to by default. It is a maximum of 51 characters.	Home School	SchoolName.Description <i>CSL_SET_SCHOOL_NAME.</i> <i>SCHOOL_NAME_DESC</i>
Grade Code	Optional	Optional	The grade for the student in that particular home school. It is a maximum of 4 characters.	Home School Grade Level	GradeLevel.Code <i>CSL_SET_GRADE_LEVEL.</i> <i>GRADE_LEVEL_CODE</i>
Projected School Number	Optional	Optional	The school the student will be transferred to as part of the Next-Year Preparation process.	Zoned School	School.Name <i>CSL_VW_SCHOOL_INFO.</i> <i>SCHOOL_DESC</i>
Registration Grade Level Code	Optional	Optional	The code for the student's grade at the time they entered the district.	Registration Grade	GradeLevel.Code <i>CSL_SET_GRADE_LEVEL.</i> <i>GRADE_LEVEL_CODE</i>
Registration Grade Level Description	Optional	Optional	The description of the student's grade at the time they entered the district.	Registration Grade	GradeLevel.Description <i>CSL_SET_GRADE_LEVEL.</i> <i>GRADE_LEVEL_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Registration Date	Optional	Optional	The date the student was registered. Refer to “Available Date Formats” on page 11.	Registration Date	DistrictStudent.RegistrationDate <i>CSL_STD_DEMO_SCHOOL. DATE_REGISTERED</i>
Addresses					
Email Address	Optional	Optional	The student’s email address. It is a maximum of 70 characters.	Email address	DistrictStudent.EmailAddress <i>CSL_STD_DEMO_DISTRICT.EMAIL</i>
Addresses>Physical Address					
Physical Address (21 physical address fields)	Optional	Optional	The student’s physical address. Because the physical address is used for address validation, the required fields depend on which address format the district supports: 2-line or 5-field. See “Available Address Fields” on page 12.	Physical Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Addresses>Mailing Address					
Mailing Address (21 mailing address fields)	Optional	Optional	The student’s mailing address, if it differs from the physical address. See “Available Address Fields” on page 12.	Mailing Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Families>Family 1					
Family 1 Name	Optional	Optional	The name of the first family. It is a maximum of 60 characters.	Family Name	StudentFamily.Name <i>CSL_FAM_STUDENT_FAMILY. FAMILY_NAME</i>
Family 1 Number	Optional	Optional	The number for the first family. The number can only be changed if the District Preferences allow it.	Family Number	StudentFamily.Number <i>CSL_FAM_STUDENT_FAMILY. FAMILY_NUMBER</i>
Families>Family 2					
Family 2 Name	Optional	Optional	The name of the second family. It is a maximum of 60 characters.	Family Name	StudentFamily.Name <i>CSL_FAM_STUDENT_FAMILY. FAMILY_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Family 2 Number	Optional	Optional	The number for the second family. The number can only be changed if the District Preferences allow it.	Family Number	StudentFamily.Number <i>CSL_FAM_STUDENT_FAMILY. FAMILY_NUMBER</i>
Medical					
Medical Number	Optional	Optional	The student's medical number for insurance purposes. It is a maximum of 13 characters.	Medical Number	DistrictStudent.MedicalNumber <i>CSL_STD_DEMO_DISTRICT. MEDICAL_NUMBER</i>
Disability Code	Optional	Optional	Any disability the student might have. It is a maximum of 17 characters.	Disability	DistrictStudent.DisabilityCode <i>CSL_STD_DEMO_DISTRICT. DISABILITY_CODE</i>
Medical Alert	Optional	Optional	Any medical alert message for the student. It is a maximum of 254 characters.	Medical Alert	DistrictStudent.MedicalAlert <i>CSL_STD_DEMO_DISTRICT. MEDICAL_ALERT</i>
Can Call Doctor	Optional	Optional	A checkbox that indicates whether the school/district has permission to call the student's doctor in emergency situations, (Yes/No).	Call Doctor	DistrictStudent.CanCallDoctor <i>CSL_STD_DEMO_DISTRICT. CAN_CALL_DOCTOR</i>
Can Call Ambulance	Optional	Optional	A checkbox that indicates whether the school/district has permission to call for an ambulance in emergency situations, (Yes/No).	Call Ambulance	DistrictStudent.CanCallAmbulance <i>CSL_STD_DEMO_DISTRICT. CAN_CALL_AMBULANCE</i>
Can Treat	Optional	Optional	A checkbox that indicates whether the school/district has permission to treat the student in emergency situations, (Yes/No).	Treat	DistrictStudent.CanTreatMedical <i>CSL_STD_DEMO_DISTRICT. CAN_TREAT_MEDICAL</i>
Medical>Doctor					
Doctor's Name	Optional	Optional	The name of the student's doctor. It is a maximum of 53 characters.	Doctor's Name	DistrictStudent.DoctorName <i>CSL_STD_DEMO_DISTRICT. DOCTOR_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Phone 1 or 2	Optional	Optional	Up to 2 sets of phone number fields for the student's doctor. See "Available Phone Number Fields and Formats" on page 11.	Doctor's Phone	DoctorPhone <i>CSL_STD_DOCTOR_PHONE</i> Note Data is stored in multiple properties/fields in this schema/table.
Address	Optional	Optional	The address of the student's doctor. See "Available Address Fields" on page 12.	Doctor's Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Miscellaneous					
Legal Alert	Optional	Optional	Any legal alert message for the student. It is a maximum of 121 characters.	Legal Alert	DistrictStudent.LegalAlert <i>CSL_STD_DEMO_DISTRICT_LEGAL_ALERT</i>
Promoted	Optional	Optional	Whether the student has been promoted, either Y (yes) or N (no).	Student status	SchoolStudent.Promoted <i>CSL_STD_DEMO_SCHOOL_PASSED_SCHOOL_YEAR</i>
Graduated	Optional	Optional	Whether the student has graduated, either Y (yes) or N (no).	Student status	SchoolStudent.Graduated <i>CSL_STD_DEMO_SCHOOL_HAS_GRADUATED</i>
Graduation Year	Optional	Optional	The year the student graduated (yyyy).	N/A	SchoolStudent.GraduationYear <i>CSL_STD_DEMO_SCHOOL_GRADUATION_YEAR</i>
Placement Classification	Optional	Optional	The student's placement classification, between 0 and 9.	Placement classification (located on main Student Demographics page)	SchoolStudent.PlacementClassification <i>CSL_STD_DEMO_SCHOOL_PLACEMENT_CLASSIFICATION</i>
Normal Program Description	Optional	Optional	The description of the normal program in which the student is registered. It is a maximum of 29 characters.	N/A	SchoolStudent.NormalProgram <i>CSL_SET_NORMAL_PROGRAM.NORMAL_PROG_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Special Program Description	Optional	Optional	The description of the special program in which the student is registered. It is a maximum of 29 characters.	N/A	SchoolStudent.SpecialProgram <i>CSL_SET_SPECIAL_PROGRAM. SPECIAL_PROG_DESC</i>
Track Description	Optional	Optional	The description of the track in which the student is registered. It is a maximum of 29 characters.	N/A	SchoolStudent.Track <i>CSL_SET_TRACK.TRACK_DESC</i>
K12Planet Upload	Optional	Optional	Indicates whether the student record is uploaded to K12Planet, either 0 (no) or 1 (yes).	Upload to K12Planet (located on main Student Demographics page)	SchoolStudent.K12PUpload <i>CSL_STD_DEMO_SCHOOL. K12P_UPLOAD</i>
Geocode Code	Optional	Optional	The code for the geocode used for the student for districts that use the geocode map to determine the student's school for the next year. It is a maximum of 11 characters.	Geocode	Geocode.Code <i>CSL_SET_GEOCODE. GEOCODE_CODE</i>
Geocode Description	Optional	Optional	The description of the geocode used for the student for districts that use the geocode map to determine the student's school for the next year. It is a maximum of 45 characters.	Geocode	Geocode.Description <i>CSL_SET_GEOCODE. GEOCODE_DESC</i>

Student Contacts

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district or school administrator.
- 2** Search for a student record.
- 3** On the Student Search Results page, click the link for the student.
- 4** On the Student Demographics page, in the control bar, click Contacts.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student					
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Relationship Code	Required *	Optional	The code for the relationship of the contact to the student. It is a maximum of 4 characters and must be a valid selection from the setup list. * Either the code or the description is required to add a new record.	Relationship to Student	Relationship.Code <i>CSL_SET_RELATION. RELATION_CODE</i>
Relationship Description	Required *	Optional	The description of the relationship of the contact to the student. It is a maximum of 15 characters and must be a valid selection from the setup list. * Either the code or the description is required to add a new record.	Relationship to Student	Relationship.Description <i>CSL_SET_RELATION. RELATION_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Is Emergency Contact	Optional	Optional	A checkbox that indicates if the contact is an emergency contact for the student, either Y (selected) or N (not selected).	Emergency	StudentContactOrdered. IsEmergencyContact <i>CSL_VW_STUDENT_CONTACT. EMERGENCY_CONTACT</i>
Has Custody	Optional	Optional	A checkbox that indicates if the contact has custody of the student, either Y (selected) or N (not selected).	Has custody of student	StudentContactOrdered.HasCustody <i>CSL_VW_STUDENT_CONTACT. CONTACT_HAS_CUSTODY</i>
Gets Mailings	Optional	Optional	A checkbox that indicates if the contact gets mailings for the student, either Y (selected) or N (not selected).	Gets mailings for student	StudentContactOrdered.GetsMailings <i>CSL_VW_STUDENT_CONTACT. CONTACT_GETS_MAILINGS</i>
Student Lives With Contact	Optional	Optional	A checkbox that indicates if the contact lives with the student, either Y (selected) or N (not selected).	Lives with student	StudentContactOrdered.LivesWith <i>CSL_VW_STUDENT_CONTACT. STUDENT_LIVES_WITH_CONTACT</i>
Contact Last Name	Required	Optional	The last name of the contact. It is a maximum of 31 characters.	Last Name	StudentContactOrdered.LastName <i>CSL_VW_STUDENT_CONTACT. LAST_NAME</i>
Contact First Name	Optional	Optional	The first name of the contact. It is a maximum of 31 characters.	First Name	StudentContactOrdered.FirstName <i>CSL_VW_STUDENT_CONTACT. FIRST_NAME</i>
Contact Middle Name	Optional	Optional	The middle name of the contact. It is a maximum of 31 characters.	Middle Name	StudentContactOrdered.MiddleName <i>CSL_VW_STUDENT_CONTACT. MIDDLE_NAME</i>
Email Address	Optional	Optional	The email address of the contact. It is a maximum of 101 characters.	N/A	StudentContactOrdered.EmailAddress <i>CSL_VW_STUDENT_CONTACT. EMAIL_ADDRESS</i>
Contact Type Code	Optional	Optional	The code for the type of contact. It is a maximum of 5 characters and must be a valid selection from the setup list.	Contact Type	ContactType.Code <i>CSL_SET_CONTACT_TYPE. CONTACT_TYPE_CODE</i>
Contact Type Description	Optional	Optional	The description of the type of contact. It is a maximum of 29 characters and must be a valid selection from the setup list.	Contact Type	ContactType.Description <i>CSL_SET_CONTACT_TYPE. CONTACT_TYPE_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Language Code	Optional	Optional	The code for the home language of the contact. It is a maximum of 4 characters and must be a valid selection from the setup list.	Home Language	Language.Code <i>CSL_SET_LANGUAGE. LANGUAGE_CODE</i>
Language Description	Optional	Optional	The description of the home language of the contact. It is a maximum of 35 characters and must be a valid selection from the setup list.	Home Language	Language.Description <i>CSL_SET_LANGUAGE. LANGUAGE_DESC</i>
Is Translator Required	Optional	Optional	A checkbox that indicates if the contact requires a translator, either Y (selected) or N (not selected).	Requires Translator	StudentContactOrdered. IsTranslatorRequired <i>CSL_VW_STUDENT_CONTACT. REQUIRES_TRANSLATER</i>
Education	Optional	Optional	The contact's level of education. It is maximum of 19 characters.	Education	StudentContactOrdered.Education <i>CSL_VW_STUDENT_CONTACT. EDUCATION</i>
SSN	Optional	Optional	The contact's social security number.	Social Security #	StudentContactOrdered.SSN <i>CSL_VW_STUDENT_CONTACT. SOCIAL_SECURITY_NUMBER</i>
Employer Type Code	Optional	Optional	The code for the type of employer the contact works for. It is a maximum of 4 characters and must be a valid selection from the setup list.	Employment Type	Employer.Code <i>CSL_SET_EMPLOYER. EMPLOYER_CODE</i>
Employer Type Description	Optional	Optional	The description of the type of employer the contact works for. It is a maximum of 15 characters and must be a valid selection from the setup list.	Employment Type	Employer.Description <i>CSL_SET_EMPLOYER. EMPLOYER_DESC</i>
Employer	Optional	Optional	The name of the contact's employer. It is a maximum of 39 characters.	Employer Name	StudentContactOrdered.Employer <i>CSL_VW_STUDENT_CONTACT. EMPLOYER_NAME</i>
Position	Optional	Optional	The position the contact holds. It is a maximum of 25 characters.	Job Position	StudentContactOrdered.Position <i>CSL_VW_STUDENT_CONTACT. JOB_POSITION</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Title Code	Optional	Optional	The code for the contact's title (e.g., Ms, Dr, etc.). It is a maximum of 4 characters and must be a valid selection from the setup list.	Title	ContactTitle.Code <i>CSL_SET_CONTACT_TITLE.</i> <i>CONTACT_TITLE_CODE</i>
Title Description	Optional	Optional	The description of the contact's title (e.g., Ms, Dr, etc.). It is a maximum of 15 characters and must be a valid selection from the setup list.	Title	ContactTitle.Description <i>CSL_SET_CONTACT_TITLE.</i> <i>CONTACT_TITLE_DESC</i>
Phones					
Phone 1-2	Optional	Optional	Up to 2 sets of phone number fields for the contact. See "Available Phone Number Fields and Formats" on page 11.	Phone Numbers	ContactPhone <i>CSL_CNT_PHONE_NUMBERS</i> Note Data is stored in multiple properties/fields in this schema/table.
Address					
21 address fields	Optional	Optional	The home address of the contact. See "Available Address Fields" on page 12.	Home Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Work Address					
21 address fields	Optional	Optional	The work address of the contact. See "Available Address Fields" on page 12.	Work Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.

District Courses

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district administrator.
- 2** In the control bar, click District Setup.
- 3** On the District Setup page, under District, click Course Catalog.
- 4** On the Course Catalog page, under Step 3, click Courses.
- 5** On the Course List page, click Add Course.

OR

Click the link for one of the courses.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
District Course					
District Calendar Description	Required	Required	A description used to uniquely identify the district calendar. It is a maximum of 20 characters. This field is used to select the calendar the data belongs to. The District Calendar Description is not updated as part of this import.	N/A	DistrictCalendar.Description <i>CSL_DISTRICT_CALENDAR.DESCRPTION</i>
Active	Optional	Optional	A checkbox that indicates whether the course is active (Yes/No).	Inactive (Course Detail)	DistrictSubjectItem.IsActive <i>CSL_SMS_DISTRICT_SUBJ_ITEM.IS_ACTIVE</i>
Number	Required	Required	The number for the course. It is a maximum of 9 characters.	Course number (Course Detail)	DistrictSubjectItem.Number <i>CSL_SMS_DISTRICT_SUBJ_ITEM.NUMBER</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Name	Required	Required	The name of the course. It is a maximum of 20 characters.	Course name (Course Detail)	DistrictSubjectItem.Name <i>CSL_SMS_DISTRICT_SUBJ_ITEM. NAME</i>
Short Name	Required	Required	The short name of the course. It is a maximum of 20 characters.	Course short name (Course Detail)	DistrictSubjectItem.ShortName <i>CSL_SMS_DISTRICT_SUBJ_ITEM. SHORT_NAME</i>
Alternate Name	Optional	Optional	An alternative name for the course. It is a maximum of 35 characters.	Course alternate name (Course Detail)	DistrictSubjectItem.AlternateName <i>CSL_SMS_DISTRICT_SUBJ_ITEM. ALTERNATE_NAME</i>
Description	Optional	Optional	A description for the course. It is a maximum of 1500 characters.	Course description (Course Detail)	DistrictSubjectItem.Description <i>CSL_SMS_DISTRICT_SUBJ_ITEM. DESCRIPTION</i>
State Number	Optional	Optional	The state number for the course. It is a maximum of 15 characters.	Course state number (Course Detail)	DistrictSubjectItem.StateNumber <i>CSL_SMS_DISTRICT_SUBJ_ITEM. STATE_NUMBER</i>
Collect Attendance	Optional	Optional	A checkbox that indicates whether attendance is collected for the course (Yes/No).	Collect Attendance (Course Detail)	DistrictSubjectItem.CollectAttendance <i>CSL_SMS_DISTRICT_SUBJ_ITEM. COLLECT_ATTENDANCE</i>
Collect Grades	Optional	Optional	A checkbox that indicates whether grades are collected for the course (Yes/No).	Collect grades for this course (Course grading)	DistrictSubjectItem.CollectGrades <i>CSL_SMS_DISTRICT_SUBJ_ITEM. COLLECT_GRADES</i>
Subject Area Code	Required	Required	The code for the subject area. It is a maximum of 4 characters and must be a valid item in the Course Subject Area setup list. The value can be N/A.	Course subject area (Course Detail)	SubjectArea.Code <i>CSL_SET_SMS_SUBJECT_AREA. SMS_SUBJECT_AREA_CODE</i>
Subject Area Description	Optional	Optional	The description of the subject area. It is a maximum of 29 characters and must be a valid item in the Course Subject Area setup list. The value can be N/A.	Course subject area (Course Detail)	SubjectArea.Description <i>CSL_SET_SMS_SUBJECT_AREA. SMS_SUBJECT_AREA_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Course Type Code	Required	Required	The code for the course type. It is a maximum of 4 characters and must be a valid item in the Course Type setup list. The value can be N/A.	Course type (Course Detail)	CourseType.Code <i>CSL_SET_SMS_COURSE_TYPE. SMS_COURSE_TYPE_CODE</i>
Course Type Description	Optional	Optional	The description of the course type. It is a maximum of 29 characters and must be a valid item in the Course Type setup list. The value can be N/A.	Course type (Course Detail)	CourseType.Description <i>CSL_SET_SMS_COURSE_TYPE. SMS_COURSE_TYPE_DESC</i>
(1) Required, (2) Elective, (3) Study Hall	Optional	Optional	Select one of: <ul style="list-style-type: none"> • Required (1) • Elective (2) • Study hall (3) Setting the value to 3 makes the field Collect Attendance required and requires that the value of Collect Grades be 0 (No).	Course is (Course Detail)	DistrictSubjectItem.SubType <i>CSL_SMS_DISTRICT_SUBJ_ITEM. SUB_TYPE</i>
District Course>Recommended Grade Levels					
Grade Level Code 1-6	Optional	Optional	Checkboxes that indicate which grades the course is taught to. It is a code of a maximum of 3 characters.	Recommended grade levels (Course Detail)	DistrictSubject_GradeLevel.Code <i>CSL_SMS_DIS_SUBJ_ITEM_GRD. GRADE_LEVEL_CODE</i>
District Course>Course Scheduling Information					
Scheduling Load	Optional	Optional	The numeric scheduling load for the course.	Scheduling load (Course Scheduling)	DistrictSubject.SchedulingLoad <i>CSL_SMS_DISTRICT_SUBJECT. SCHEDULING_LOAD</i>
Maximum Students	Optional	Optional	The maximum number of students for the course.	Maximum students (Course Scheduling)	DistrictSubject.MaxStudents <i>CSL_SMS_DISTRICT_SUBJECT. MAX_STUDENTS</i>
Minimum Students	Optional	Optional	The minimum number of students for the course.	Minimum students (Course Scheduling)	DistrictSubject.MinStudents <i>CSL_SMS_DISTRICT_SUBJECT. MIN_STUDENTS</i>
Optimal Students	Optional	Optional	The optimal number of students for the course.	Optimal students (Course Scheduling)	DistrictSubject.OptimalStudents <i>CSL_SMS_DISTRICT_SUBJECT. OPTIMAL_STUDENTS</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
District Course>Course Scheduling Information>Prerequisites					
Prerequisite Course Number 1-4	Optional	Optional	The course number of prerequisites for the course. It is a maximum 12 characters.	Prerequisites (Course Scheduling)	DistrictSubjectItem.Number <i>CSL_SMS_DISTRICT_SUBJ_ITEM. NUMBER</i>
District Course>Course Scheduling Information>Corequisites					
Corequisite Course Number 1-4	Optional	Optional	The course number of corequisites for the course. It is a maximum of 12 characters.	Corequisites (Course Scheduling)	DistrictSubjectItem.Number <i>CSL_SMS_DISTRICT_SUBJ_ITEM. NUMBER</i>
District Courses>Course Grading Information					
Maximum Credits	Optional	Optional	The maximum number of credits that can be obtained for the course.	Max. credits (Course Scheduling)	DistrictGradedCourse.MaxCredits <i>CSL_SMS_DIS_GRADED_CRS. MAX_CREDITS</i>
Allow Partial Credit	Optional	Optional	A checkbox that indicates whether partial credits are allowed (Yes/No).	Allow partial credits (Course Grading)	DistrictGradedCourse.AllowPartialCredit <i>CSL_SMS_DIS_GRADED_CRS. ALLOW_PARTIAL_CREDIT</i>
Exclude From GPA	Optional	Optional	A checkbox that indicates whether the course should be excluded from GPA calculations (Yes/No).	Exclude from GPA (Course Grading)	DistrictGradedCourse.ExcludeFromGPA <i>CSL_SMS_DIS_GRADED_CRS. EXCLUDE_FROM_GPA</i>
Adjustment Factor Add	Optional	Optional	A checkbox that indicates whether the credits should be adjusted by adding the value in the associated field (Yes/No).	Adjustment factor – Add (Course Grading)	DistrictGradedCourse.AdjFactorAdd <i>CSL_SMS_DIS_GRADED_CRS. ADJ_FACTOR_ADD</i>
Adjustment Factor Multiply	Optional	Optional	A checkbox that indicates whether the credits should be adjusted by multiplying by the value in the associated field (Yes/No).	Adjustment factor – Multiply (Course Grading)	DistrictGradedCourse.AddFactorMultiply <i>CSL_SMS_DIS_GRADED_CRS. ADJ_FACTOR_MULTIPLY</i>

Facility Buildings

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a school administrator.
- 2 In the control bar, click School Setup.
- 3 On the School Setup page, under School, click Buildings and Rooms.
- 4 On the Buildings page, click Add Building.

OR

Click the Building No. link for one of the records.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School					
School Number	Required	Required	An ID used to uniquely identify a school within the district. It is a maximum of 9 characters. This field is used to select the school the data belongs to. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO.SCHOOL_CODE</i>
Building Number	Required	Required	An ID used to uniquely identify the building. It is a maximum of 5 characters.	Building no.	Building.Number <i>CSL_SMS_BUILDING.NUMBER</i>
Building Name	Optional	Optional	The name of the building. It is a maximum of 40 characters.	Building name	Building.Name <i>CSL_SMS_BUILDING.NAME</i>
Physical Address					
21 physical address fields	Optional	Optional	The physical address for the building. See “Available Address Fields” on page 12.	Physical address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Mailing Address					
21 mailing address fields	Optional	Optional	The mailing address for the building, if it differs from the physical address. See “Available Address Fields” on page 12.	Mailing address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Contact Name	Optional	Optional	A contact name for the building. It is a maximum of 50 characters.	Contact name	Building.ContactName <i>CSL_SMS_BUILDING.CONTACT_NAME</i>
Maximum Capacity	Optional	Optional	The maximum number of people permitted in the school.	Maximum capacity	Building.MaxCapacity <i>CSL_SMS_BUILDING.MAX_CAPACITY</i>
Building Communication 1-4					
3 building communication fields for 1-4	Optional	Optional	Up to 4 numbers, each of which must be accompanied by a code and description from the Communication Number Type setup list.	Communication number/ Communication type	BuildingCommunication <i>CSL_SMS_BUILDING_COMM</i> Note Data is stored in multiple properties/fields in this schema/table.

Facility Rooms

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a school administrator.
- 2 In the control bar, click School Setup.
- 3 On the School Setup page, under School, click Buildings and Rooms.
- 4 On the Buildings page, click the # Rooms link for one of the records.
- 5 On the Rooms page, click Add Room.

OR

Click the Room No. link for one of the courses.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School and Building					
School Number	Required	Required	An ID used to uniquely identify a school within the district. It is a maximum of 9 characters. This field is used to select the school the data belongs to. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO. SCHOOL_CODE</i>
Building Number	Required	Required	An ID used to uniquely identify the building. It is a maximum of 5 characters. This field is used to select the school the data belongs to. The Building Number is not updated as part of this import.	N/A	Building.Number <i>CSL_SMS_BUILDING.NUMBER</i>
Room Number	Required	Required	An ID used to uniquely identify the room. It is a maximum of 6 characters.	Room no.	Room.Number <i>CSL_SMS_ROOM.NUMBER</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Room Name	Required	Optional	The name of the room. It is a maximum of 35 characters.	Room name	Room.Name <i>CSL_SMS_ROOM.NAME</i>
Room Type Code	Required *	Optional	The type of room. It is a maximum of 11 characters. * Either the code or the description is required when adding a new record.	Room type	FacilityRoomType.Code <i>CSL_SET_SMS_ROOM_TYPE.</i> <i>SMS_ROOM_TYPE_CODE</i>
Room Type Description	Required *	Optional	The type of room. It is a maximum of 45 characters and must be a valid selection from the Room Type setup list. * Either the code or the description is required when adding a new record.	Room type	FacilityRoomType.Description <i>CSL_SET_SMS_ROOM_TYPE.</i> <i>SMS_ROOM_TYPE_DESC</i>
Optimal Capacity	Required	Optional	The optimal number of people for the room.	Optimal capacity	Room.OptimalCapacity <i>CSL_SMS_ROOM.</i> <i>OPTIMAL_CAPACITY</i>
Maximum Capacity	Required	Optional	The maximum number of people allowed in the room.	Maximum capacity	Room.MaxCapacity <i>CSL_SMS_ROOM.MAX_CAPACITY</i>
Schedulable?	Optional	Optional	A checkbox that indicates whether the room can be included in scheduling, either 0 (no) or 1 (yes).	Can be scheduled	Room.Schedulable <i>CSL_SMS_ROOM.SCHEDULABLE</i>
Multiple Classes Allowed?	Optional	Optional	A checkbox that indicates whether multiple classes can be scheduled in the room concurrently, either 0 (no) or 1 (yes).	Allow # concurrent classes	Room.MultipleClassesAllowed <i>CSL_SMS_ROOM.</i> <i>MULTIPLE_CLASSES_ALLOWED</i>
Wheel Chair Accessible?	Optional	Optional	A checkbox that indicates whether the room is wheelchair accessible, either 0 (no) or 1 (yes).	Wheelchair accessible	Room.WheelChairAccessible <i>CSL_SMS_ROOM.</i> <i>WHEEL_CHAIR_ACCESSIBLE</i>
Comments	Optional	Optional	Any comments about the room. It is a maximum of 250 characters.	Comments	Room.Comments <i>CSL_SMS_ROOM.COMMENTS</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Room Communication 1-4					
3 room communication fields for 1-4	Optional	Optional	Up to 4 phone numbers, each of which must be accompanied by a code and description from the Communication Number Type setup list.	Communication number/ Communication type	RoomCommunication <i>CSL_SMS_ROOM_COMM</i> Note Data is stored in multiple properties/fields in this schema/table.

Historical Years

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Historical.
- 5 On the Historical page, click Add Historical Year

OR

Click the Year link for an existing historical year.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Year	Required	Required	The historical year to be added.	Year	HistoricalYear.Year <i>CSL_STD_HISTORICAL_YEAR.YEAR</i>
School Name	Required	Required	The name of the school the student attended during the historical year. It is a maximum of 60 characters.	School	HistoricalYear.SchoolName <i>CSL_STD_HISTORICAL_YEAR. SCHOOL_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School CBCC	Optional	Optional	The CBCC code for the school. It is a maximum of 10 characters.	CBCC	HistoricalYear.SchoolCBCC <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_CBCC</i>
School Number	Required	Required	The number of the school the student attended during the historical year. It is a maximum of 10 characters.	School number	HistoricalYear.SchoolNumber <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_NUMBER</i>
School Principal	Optional	Optional	The name of the principal for the school. It is a maximum of 30 characters.	Principal	HistoricalYear.SchoolPrincipal <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_PRINCIPAL</i>
School Address1	Optional	Optional	The street address of the school. It is a maximum of 50 characters. See “Available Address Fields” on page 12.	Address	HistoricalYear.SchoolAddress1 <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_ADDRESS1</i>
School Address2	Optional	Optional	The street address of the school. It is a maximum of 50 characters. See “Available Address Fields” on page 12.	Address	HistoricalYear.SchoolAddress2 <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_ADDRESS2</i>
School City	Optional	Optional	The city for the school. It is a maximum of 35 characters.	City	HistoricalYear.SchoolCity <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_CITY</i>
School State	Optional	Optional	The state for the school. It is a maximum of 10 characters.	State	HistoricalYear.SchoolState <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_STATE</i>
School Country	Optional	Optional	The country for the school. It is a maximum of 10 characters.	Country	HistoricalYear.SchoolCountry <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_COUNTRY</i>
School Zip	Optional	Optional	The zip code for the school. It is a maximum of 10 characters.	Zip	HistoricalYear.SchoolZip <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_ZIP</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School Phone	Optional	Optional	The phone number for the school. It is a maximum of 25 characters in the interface, but should be no more than 16 digits for the import. See “Available Phone Number Fields and Formats” on page 11.	Phone	HistoricalYear.SchoolPhone <i>CSL_STD_HISTORICAL_YEAR. SCHOOL_PHONE</i>
School Fax	Optional	Optional	The fax number for the school. It is a maximum of 25 characters.	Fax	HistoricalYear.SchoolFax <i>CSL_STD_HISTORICAL_YEAR. SCHOOL_FAX</i>
School Comment	Optional	Optional	Any comments for the school. It is a maximum of 400 characters.	Comments	HistoricalYear.SchoolComment <i>CSL_STD_HISTORICAL_YEAR. SCHOOL_COMMENT</i>
Grade Level	Required	Required	The grade level of the student during the historical year.	Grade Level	HistoricalYear.Grade <i>CSL_STD_HISTORICAL_YEAR. GRADE</i>
Homeroom	Optional	Optional	The homeroom the student was in during the historical year. It is a maximum of 10 characters.	Homeroom	HistoricalYear.Homeroom <i>CSL_STD_HISTORICAL_YEAR. HOMEROOM</i>
Yearly Absences	Optional	Optional	The total number of absences for the student during the year.	Yearly absences	HistoricalYear.YearlyAbsent <i>CSL_STD_HISTORICAL_YEAR. YEARLY_ABSENT</i>
Yearly Earned Credit	Optional	Optional	The total number of credits earned by the student during the year.	Yearly credits: Earned	HistoricalYear.TotalEarnedCredit <i>CSL_STD_HISTORICAL_YEAR. TOTAL_EARNED_CREDIT</i>
Yearly Potential Credits	Optional	Optional	The potential number of credits the student could have earned during the year.	Yearly credits: Potential	HistoricalYear.TotalPotentialCredit <i>CSL_STD_HISTORICAL_YEAR. TOTAL_POTENTIAL_CREDIT</i>
Yearly Local Earned Credits	Optional	Optional	The number of local credits the student earned during the year.	Yearly credits: Local	HistoricalYear.LocalEarnedCredit <i>CSL_STD_HISTORICAL_YEAR. LOCAL_EARNED_CREDIT</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Yearly State Earned Credits	Optional	Optional	The number of state credits the student earned during the year.	Yearly credits: State	HistoricalYear.StateEarnedCredit <i>CSL_STD_HISTORICAL_YEAR.STATE_EARNED_CREDIT</i>
Unweighted GPA	Optional	Optional	The student's unweighted GPA.	Yearly GPA: Unweighted	HistoricalYear.GPA <i>CSL_STD_HISTORICAL_YEAR.GPA</i>
Weighted GPA	Optional	Optional	The student's weighted GPA.	Yearly GPA: Weighted	HistoricalYear.WeightedGPA <i>CSL_STD_HISTORICAL_YEAR.WEIGHTED_GPA</i>
Comment	Optional	Optional	Any comments related to grading or attendance. It is a maximum of 400 characters.	Comments	HistoricalYear.Comment <i>CSL_STD_HISTORICAL_YEAR.COMMENT</i>
Class Rank Date	Optional	Optional	The date on which the student's class rank was calculated. See "Available Phone Number Fields and Formats" on page 11.	Class rank date	HistoricalYear.ClassRankDate <i>CSL_STD_HISTORICAL_YEAR.CLASS_RANK_DATE</i>
Class Rank	Optional	Optional	The student's class rank.	Class rank	HistoricalYear.ClassRank <i>CSL_STD_HISTORICAL_YEAR.CLASS_RANK</i>
Class Rank Out Of	Optional	Optional	The total number of students used to determine class rank.	Out of	HistoricalYear.ClassRankOutOf <i>CSL_STD_HISTORICAL_YEAR.CLASS_RANKOUTOF</i>
Class Rank Percentile	Optional	Optional	The student's class rank, calculated as a percentile.	Percentile	HistoricalYear.ClassRankPercentile <i>CSL_STD_HISTORICAL_YEAR.CLASS_RANK_PERCENTILE</i>
Class Rank Relative Position	Optional	Optional	The student's relative position in the class ranking.	Relative position only	HistoricalYear.ClassRankRelPosition <i>CSL_STD_HISTORICAL_YEAR.CLASS_RANK_REL_POSITION</i>
Present	Optional	Optional	The total number of present attendance codes received by the student during the year.	Present	HistoricalYear.Present <i>CSL_STD_HISTORICAL_YEAR.PRESENT</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Excused Absences	Optional	Optional	The total number of excused absence attendance codes received by the student during the year.	Excused absences	HistoricalYear.AbsentExcused <i>CSL_STD_HISTORICAL_YEAR. ABSENT_EXCUSED</i>
Unexcused Absences	Optional	Optional	The total number of unexcused absence attendance codes received by the student during the year.	Unexcused absences	HistoricalYear.AbsentUnexcused <i>CSL_STD_HISTORICAL_YEAR. ABSENT_UNEXCUSED</i>
Excused Tardies	Optional	Optional	The total number of excused tardy attendance codes received by the student during the year.	Excused tardies	HistoricalYear.TardyExcused <i>CSL_STD_HISTORICAL_YEAR. TARDY_EXCUSED</i>
Unexcused Tardies	Optional	Optional	The total number of unexcused tardy attendance codes received by the student during the year.	Unexcused tardies	HistoricalYear.TardyUnexcused <i>CSL_STD_HISTORICAL_YEAR. TARDY_UNEXCUSED</i>
District Number	Optional	Optional	The number for the district in which the student was enrolled during the year.	District number	HistoricalYear.DistrictNumber <i>CSL_STD_HISTORICAL_YEAR. DISTRICT_NUMBER</i>
Weighted Total Points	Optional	Optional	The total number of weighted grade points used in cumulative GPAs.	Total Points: Weighted	HistoricalYear.TotalWeightedGradePoints <i>CSL_STD_HISTORICAL_YEAR. TOTAL_GRADE_POINTS_ WEIGHTED</i>
Unweighted Total Points	Optional	Optional	The total number of unweighted grade points used in cumulative GPAs.	Total Points: Unweighted	HistoricalYear.TotalUnweightedGradePoints <i>CSL_STD_HISTORICAL_YEAR. TOTAL_GRADE_POINTS_ UNWEIGHTED</i>
Weighted Number Of Grades	Optional	Optional	The total number of weighted grades used in cumulative GPAs.	Total number of grades: Weighted	HistoricalYear.TotalWeightedNumberOfGrades <i>CSL_STD_HISTORICAL_YEAR. TOTAL_NUMBER_GRADES_ WEIGHTED</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Unweighted Number Of Grades	Optional	Optional	The total number of unweighted grades used in cumulative GPAs.	Total number of grades: Unweighted	HistoricalYear. TotalUnweightedNumberOfGrades <i>CSL_STD_HISTORICAL_YEAR.</i> <i>TOTAL_NUMBER_GRADES_</i> <i>WEIGHTED</i>

Historical Courses

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Historical.
- 5 On the Historical page, click the No. Courses link for an existing historical year.
- 6 On the Historical Courses page, click Add Historical Course

OR

Click the Course No. link for an existing historical course.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Historical Year	Required	Required	An existing historical year for the specified student number. This field is used to select the student the data belongs to. The Historical Year is not updated as part of this import.	N/A	HistoricalYear.Year <i>CSL_STD_HISTORICAL_YEAR.YEAR</i>
Grade Level	Required	Required	The grade level of the student during the historical course. This field is used to select the student the data belongs to. The Grade Level is not updated as part of this import.	N/A	HistoricalYear.Grade <i>CSL_STD_HISTORICAL_YEAR.GRADE</i>
School Name	Required	Required	The name of the school the student attended while taking the historical course. This field is used to select the student the data belongs to. The School Name is not updated as part of this import.	N/A	HistoricalYear.SchoolName <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School Number	Required	Required	The number of the school the student attended while taking the historical course. This field is used to select the student the data belongs to. The School Number is not updated as part of this import.	N/A	HistoricalYear.SchoolNumber <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_NUMBER</i>
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student Number is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT.NUMBER</i>
Show On Transcript	Required	Optional	Determines whether the historical course will appear on the student's transcript, either 0 (no) or 1 (yes).	Show on transcript	HistoricalCourse.ShowOnTranscript <i>CSL_STD_HISTORICAL_COURSE.SHOW_ON_TRANSCRIPT</i>
Course Number	Optional	Optional	The number for the historical course. It is a maximum of 30 characters.	Course number	HistoricalCourse.Number <i>CSL_STD_HISTORICAL_COURSE.NUMBER</i>
State Course ID	Optional	Optional	The state ID for the course. It is a maximum of 30 characters.	State course ID	HistoricalCourse.StateNumber <i>CSL_STD_HISTORICAL_COURSE.STATE_NUMBER</i>
Course Name	Required	Optional	The name of the course. It is a maximum of 100 characters.	Course name	HistoricalCourse.Name <i>CSL_STD_HISTORICAL_COURSE.NAME</i>
Alternate Name	Optional	Optional	An alternate name for the course. It is a maximum of 50 characters.	Alternate name	HistoricalCourse.AlternateName <i>CSL_STD_HISTORICAL_COURSE.ALTERNATE_NAME</i>
Short Name	Required	Optional	The short name of the course for use on reports. It is a maximum of 50 characters.	Short name	HistoricalCourse.ShortName <i>CSL_STD_HISTORICAL_COURSE.SHORT_NAME</i>
Course Type	Required	Optional	The type of course (e.g., seminar). It is a maximum of 20 characters.	Course type	HistoricalCourse.CourseType <i>CSL_STD_HISTORICAL_COURSE.COURSE_TYPE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Department	Optional	Optional	The department to which the course belongs. It is a maximum of 30 characters.	Department	HistoricalCourse.Department <i>CSL_STD_HISTORICAL_COURSE. DEPARTMENT</i>
Course Grade Level	Optional	Optional	The grade level for the course.	Course grade level	HistoricalCourse.GradeLevel <i>CSL_STD_HISTORICAL_COURSE. GRADE_LEVEL</i>
Section	Optional	Optional	The section of the course. It is a maximum of 2 characters.	Section	HistoricalCourse.Section <i>CSL_STD_HISTORICAL_COURSE. SECTION</i>
Teacher	Optional	Optional	The name of the course's teacher. It is a maximum of 60 characters.	Teacher	HistoricalCourse.Teacher <i>CSL_STD_HISTORICAL_COURSE. TEACHER</i>
Description	Optional	Optional	A description of the course. It is a maximum of 256 characters.	Description	HistoricalCourse.Description <i>CSL_STD_HISTORICAL_COURSE. DESCRIPTION</i>
Present	Optional	Optional	The total number of present attendance codes received by the student for the course.	Present	HistoricalCourse.Present <i>CSL_STD_HISTORICAL_COURSE. PRESENT</i>
Excused Absences	Optional	Optional	The total number of excused absence attendance codes received by the student for the course.	Excused absences	HistoricalCourse.AbsentExcused <i>CSL_STD_HISTORICAL_COURSE. ABSENT_EXCUSED</i>
Unexcused Absences	Optional	Optional	The total number of unexcused absence attendance codes received by the student for the course.	Unexcused absences	HistoricalCourse.AbsentUnexcused <i>CSL_STD_HISTORICAL_COURSE. ABSENT_UNEXCUSED</i>
Excused Tardies	Optional	Optional	The total number of excused tardy attendance codes received by the student for the course.	Excused tardies	HistoricalCourse.TardyExcused <i>CSL_STD_HISTORICAL_COURSE. TARDY_EXCUSED</i>
Unexcused Tardies	Optional	Optional	The total number of unexcused tardy attendance codes received by the student for the course.	Unexcused tardies	HistoricalCourse.TardyUnexcused <i>CSL_STD_HISTORICAL_COURSE. TARDY_UNEXCUSED</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Subject Area Code	Required	Required	The subject area to which the course belongs. It is a maximum of 4 characters and must be a valid selection from the Chancery SMS Subject Area setup list.	Subject area	SubjectArea.Code <i>CSL_SET_SMS_SUBJECT_AREA.CODE</i>
Subject Area Description	Required	Optional	The subject area to which the course belongs. It is a maximum of 29 characters and must be a valid selection from the Chancery SMS Subject Area setup list.	Subject area	SubjectArea.Description <i>CSL_SET_SMS_SUBJECT_AREA.DESCRPTION</i>
Exclude From Cum. GPA Calcs	Optional	Optional	Indicates whether the course should be excluded from cumulative GPA calculations, either Y (yes) or N (no).	Exclude from cum GPA calcs	HistoricalCourse.ExcludeFromCumGPA Calcs <i>CSL_STD_HISTORICAL_COURSE.EXCLUDE_FROM_CUMGPA_CALCS</i>
Summer School	Optional	Optional	A checkbox that indicates whether the student attended summer school (Yes/No).	Summer School	HistoricalCourse.SummerSchool <i>CSL_STD_HISTORICAL_COURSE.SUMMER_SCHOOL</i>
Course Level	Optional	Optional	The course level that was used to perform the grading calculations in the student's historical record.	Course Level	HistoricalCourse.CourseLevel <i>CSL_STD_HISTORICAL_COURSE.COURSE_LEVEL</i>
Adjustment Factor - Add	Optional	Optional	A checkbox that indicates whether the historical course grades were adjusted by adding the value in the associated field (Yes/No).	Adjustment Factor - Add	HistoricalCourse.AdjFactorAdd <i>CSL_STD_HISTORICAL_COURSE.ADJ_FACTOR_ADD</i>
Adjustment Factor - Multiply	Optional	Optional	A checkbox that indicates whether the historical course grades were adjusted by multiplying the value in the associated field (Yes/No).	Adjustment Factor - Multiply	HistoricalCourse.AdjFactorMultiply <i>CSL_STD_HISTORICAL_COURSE.ADJ_FACTOR_ADD</i>

Historical Course Bins

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Historical.
- 5 On the Historical page, click the No. Courses link for an existing historical year.
- 6 On Historical Courses page, click the Course No. link for an existing historical course.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Historical Year	Required	Required	An existing historical year for the specified student number. This field is used to select the student the data belongs to. The Historical Year is not updated as part of this import.	N/A	HistoricalYear.Year <i>CSL_STD_HISTORICAL_YEAR.YEAR</i>
Grade Level	Required	Required	The grade level of the student during the historical course. This field is used to select the student the data belongs to. The Grade Level is not updated as part of this import.	N/A	HistoricalYear.Grade <i>CSL_STD_HISTORICAL_YEAR.GRADE</i>
School Name	Required	Required	The name of the school the student attended while taking the historical course. This field is used to select the student the data belongs to. The School Name is not updated as part of this import.	N/A	HistoricalYear.SchoolName <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School Number	Required	Required	The number of the school the student attended while taking the historical course. This field is used to select the student the data belongs to. The School Number is not updated as part of this import.	N/A	HistoricalYear.SchoolNumber <i>CSL_STD_HISTORICAL_YEAR.SCHOOL_NUMBER</i>
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student Number is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT.NUMBER</i>
Course Name	Required	Required	The name of the course. It is a maximum of 100 characters. This field is used to select the course the data belongs to. The Course Name is not updated as part of this import.	Course name	HistoricalCourse.Name <i>CSL_STD_HISTORICAL_COURSE.NAME</i>
Course Number	Required	Required	An existing course number for the specified historical year. This field is used to select the course the data belongs to. The Course Number is not updated as part of this import.	N/A	HistoricalCourse.Number <i>CSL_STD_HISTORICAL_COURSE.NUMBER</i>
Section	Optional	Optional	The section of the course. It is a maximum of 2 characters. This field is used to select the course the data belongs to. The Section is not updated as part of this import.	Section	HistoricalCourse.Section <i>CSL_STD_HISTORICAL_COURSE.SECTION</i>
Grade Item	Required	Required	An historical grade item set up by the school you are importing to. See the Transcript Grade Items page for the school or the <i>CSL_HISTORICAL_GRADE_ITEM</i> table. If the school does not belong to the district, you can determine your own grade items.	Grade Item	HistoricalCourseBin.GradeItem <i>CSL_STD_HISTORICAL_BIN.GRADE_ITEM</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Leveled Letter Grade	Optional	Optional	The leveled letter grade the student received for the historical course.	Leveled Letter Grade	HistoricalCourseBin.LetterGrade <i>CSL_STD_HISTORICAL_BIN. LETTER_GRADE</i>
Leveled Numeric Grade	Optional	Optional	The leveled numeric grade the student received for the historical course.	Leveled Numeric Grade	HistoricalCourseBin.Percentage <i>CSL_STD_HISTORICAL_BIN. PERCENTAGE</i>
Credits Earned	Optional	Optional	The credits the student earned for the course.	Credits Earned	HistoricalCourseBin.CreditsEarned <i>CSL_STD_HISTORICAL_BIN. CREDITS_EARNED</i>
Pass or Fail	Optional	Optional	Indicates whether the student passed or failed the course, either 0 (fail) or 1 (pass).	Pass/Fail	HistoricalCourseBin.PassFail <i>CSL_STD_HISTORICAL_BIN. PASS_FAIL</i>
Final Grade	Required	Required	Indicates whether the grade is a final grade for class rank calculation purposes, either 0 (no) or 1 (yes).	Final Grade	HistoricalCourseBin.FinalGrade <i>CSL_STD_HISTORICAL_BIN. FINAL_GRADE</i>
Leveled Grade Points	Optional	Optional	The leveled grade point score the student received for the course.	Leveled Grade Points	HistoricalCourseBin.GradePoints <i>CSL_STD_HISTORICAL_BIN. GRADE_POINTS</i>
Potential Credits	Optional	Optional	The total number of credits the student could have received for the course.	Potential Credits	HistoricalCourseBin.PotentialCredits <i>CSL_STD_HISTORICAL_BIN. POTENTIAL_CREDITS</i>
Grading Period Start Date	Optional	Optional	Indicates the start date of the grading period in which the grades were earned.	Grading Period Start Date	GradingPeriod.StartDate <i>CSL_SMS_GRADING_PERIOD. START_DATE</i>
Grading Period End Date	Optional	Optional	Indicates the end date of the grading period in which the grades were earned.	Grading Period End Date	GradingPeriod.EndDate <i>CSL_SMS_GRADING_PERIOD. END_DATE</i>
Unleveled Letter Grade	Optional	Optional	The unleveled letter grade the student received for the course. Characters such as “-” or “+” are allowed.	Unleveled Letter Grade	HistoricalCourseBin.UnleveledLetterGrade <i>CSL_STD_HISTORICAL_BIN. UNLEVELED_LETTER_GRADE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Unleveled Numeric Grade	Optional	Optional	The unleveled numeric grade the student received for the course.	Unleveled Numeric Grade	HistoricalCourseBin.UnleveledNumeric Grade <i>CSL_STD_HISTORICAL_BIN. UNLEVELED_NUMERIC_GRADE</i>
Unleveled Grade Points	Optional	Optional	The unleveled grade points the student received for the course.	Unleveled Grade Points	HistoricalCourseBin.UnleveledGrade Points <i>CSL_STD_HISTORICAL_BIN. UNLEVELED_GRADE_POINTS</i>

Staff

The Staff record type affects two types of records: staff records and user accounts

TO NAVIGATE TO THE LOCATION OF THE STAFF RECORD FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under District, click Staff.
- 4 On the Staff List page, click Add Staff Member.

OR

Click the link for one of the records.

TO NAVIGATE TO THE LOCATION OF THE USER ACCOUNT FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under Users, click Accounts.
- 4 On the Accounts page, click Add User.

OR

Click the link for one of the records.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Staff Number	Required	Required	An ID that uniquely identifies the staff member. It is a maximum of 9 characters.	Staff ID	StaffDemographic.StaffNumber <i>CSL_STAFF_DEMO_DISTRICT. STAFF_NUMBER</i>
First Name	Required	Required	The staff member's first name. It is a maximum of 64 characters.	First name (on the Edit User page)	User.FirstName <i>CSL_SMS_USER.FIRST_NAME</i>
Middle Name	Optional	Optional	The staff member's middle name. It is a maximum of 64 characters.	Middle name (on the Edit User page)	User.MiddleName <i>CSL_SMS_USER.MIDDLE_NAME</i>
Last Name	Required	Required	The staff member's last name. It is a maximum of 64 characters.	Last name (on the Edit User page)	User.LastName <i>CSL_SMS_USER.LAST_NAME</i>
Preferred Name	Optional	Optional	The staff member's preferred name. It is a maximum of 64 characters.	Preferred (on the Edit User page)	User.PreferredName <i>CSL_SMS_USER.PREFERRED_NAME</i>
Login ID	Required	Required	The Login ID for a user account that has not yet been created. Note You must create the associated user account before you create a staff record manually. For import, the user account must be created at the same time as the staff record.	User	User.LoginID <i>CSL_SMS_USER.LOGIN_ID</i>
Password	Required	Required	The staff member's password. It is a maximum of 255 characters.	Password (on the Edit User page)	User.Password <i>CSL_SMS_USER.PASSWORD</i>
Email Address	Optional	Optional	The staff member's email address. It is a maximum of 256 characters.	Email (on the Edit User page)	User.EmailAddress <i>CSL_SMS_USER.EMAIL_ADDRESS</i>
Role Description	Optional	Optional	The role assigned to the user account. It is a maximum of 1024 characters and must be a valid selection from the list of available roles.	Role (on the Edit User page)	Role.Description <i>CSL_SMS_ROLE.ROLE_DESC</i>
User Role					
Role Scope	Optional	Optional	The scope assigned to the user account, either district (1) or school (2).	Scope (on the Edit User page)	Role.RoleScope <i>CSL_SMS_ROLE.ROLE_SCOPE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Previous First Name	Optional	Optional	The staff member's previous first name. It is a maximum of 20 characters.	Previous First Name	StaffDemographic.PreviousFirstName <i>CSL_STAFF_DEMO_DISTRICT. PREVIOUS_FIRST_NAME</i>
Previous Middle Name	Optional	Optional	The staff member's previous middle name. It is a maximum of 20 characters.	Previous Middle Name	StaffDemographic.PreviousMiddleName <i>CSL_STAFF_DEMO_DISTRICT. PREVIOUS_MIDDLE_NAME</i>
Previous Last Name	Optional	Optional	The staff member's previous last name. It is a maximum of 50 characters.	Previous Last Name	StaffDemographic.PreviousLastName <i>CSL_STAFF_DEMO_DISTRICT. PREVIOUS_LAST_NAME</i>
Birth date	Optional	Optional	The staff member's birthdate. See "Available Date Formats" on page 11.	Birthdate	StaffDemographic.Birthdate <i>CSL_STAFF_DEMO_DISTRICT. BIRTH_DATE</i>
Part-Time/ Full-Time Status	Optional	Optional	The staff member's status as full-time or part-time, expressed as a percentage.	% of Full Time Status	StaffDemographic. PartTimeFullTimeStatus <i>CSL_STAFF_DEMO_DISTRICT. PT_FT_STATUS</i>
Staff Service To EL Code	Optional	Optional	The code associated with the staff member's ability to provide instructional services to English learners. It is a maximum of 4 characters.	Instr. Services to English Learners	StaffServiceToEL.Code <i>CSL_SET_STAFF_SERVICE_EL. STAFF_SERVICE_CODE</i>
Staff Service To EL Description	Optional	Optional	The description associated with the staff member's ability to provide instructional services to English learners. It is a maximum of 29 characters.	Instr. Services to English Learners	StaffServiceToEL.Description <i>CSL_SET_STAFF_SERVICE_EL. STAFF_SERVICE_DESC</i>
Staff Education Level Code	Optional	Optional	The code for the staff member's highest level of education. It is a maximum of 4 characters.	Education Level	StaffEducationLevel.Code <i>CSL_SET_STAFF_EDUCATION. STAFF_EDUCATION_CODE</i>
Staff Education Level Description	Optional	Optional	The description of the staff member's highest level of education. It is a maximum of 4 characters and must be a valid selection from the setup list. The default for districts that do not use this field is N/A.	Education Level	StaffEducationLevel.Description <i>CSL_SET_STAFF_EDUCATION. STAFF_EDUCATION_DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Year Degree Earned	Optional	Optional	The year the staff member earned the degree obtained at their highest level of education (yyyy).	Year Degree Earned	StaffDemographic.DegreeEarnedYear <i>CSL_STAFF_DEMO_DISTRICT. DEGREE_EARNED_YEAR</i>
Gender	Optional	Optional	The staff member's gender, either F (female) or M (male).	Gender	StaffDemographic.Gender <i>CSL_STAFF_DEMO_DISTRICT. GENDER</i>
Federal Ethnic Category Code	Optional	Optional	The code for the staff member's federal ethnic category. It is a maximum of 4 characters.	Federal Ethnic Category	FederalEthnicCategory.Code <i>CSL_SET_FEDERAL_ETHNICITY. FEDERAL_ETHNICITY_CODE</i>
Federal Ethnic Category Description	Optional	Optional	The description of the staff member's federal ethnic category. It is a maximum of 4 characters.	Federal Ethnic Category	FederalEthnicCategory.Description <i>CSL_SET_FEDERAL_ETHNICITY. FEDERAL_ETHNICITY_DESC</i>
Hire date	Optional	Optional	The date the staff member was hired. See "Available Date Formats" on page 11.	Hire Date	StaffDemographic.Hiredate <i>CSL_STAFF_DEMO_DISTRICT. HIRE_DATE</i>
Previous Years of Experience in District	Optional	Optional	The total number of years of experience the staff member has in the district.	Yrs Prev. Experience in District	StaffDemographic. PreviousYearsExperienceInDistrict <i>CSL_STAFF_DEMO_DISTRICT. TOTAL_PREV_YR_CURR_DIST</i>
Previous Years Experience	Optional	Optional	The total number of years of experience the staff member has in all districts.	Yrs Experience Outside District	StaffDemographic. PreviousYearsExperience <i>CSL_STAFF_DEMO_DISTRICT. TOTAL_PREV_YEAR</i>
Exit date	Optional	Optional	The date the staff member exited the district. See "Available Date Formats" on page 11.	Exit Date	StaffDemographic.Exitdate <i>CSL_STAFF_DEMO_DISTRICT. EXIT_DATE</i>
Staff Position Status Code	Optional	Optional	The code for the staff member's position. It is a maximum of 4 characters and must be a valid selection from the setup list. The default for districts that do not use this field is N/A.	Position	StaffPositionStatus.Code <i>CSL_SET_STAFF_POSITION. STAFF_POSITION_CODE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Staff Position Status Description	Optional	Optional	The description of the staff member's position. It is a maximum of 29 characters and must be a valid selection from the setup list. The default for districts that do not use this field is N/A.	Position	StaffPositionStatus.Description <i>CSL_SET_STAFF_POSITION.</i> <i>STAFF_POSITION_DESC</i>
School Number	Optional	Optional	The ID of the school to which the staff member is assigned. It is a maximum of 9 characters and must be a valid selection from the list of schools.	Home School	School.Number <i>CSL_SET_SCHOOL_INFO.</i> <i>SCHOOL_CODE</i>
CDS Number	Optional	Optional	The County-District-School number for the staff member. It is a maximum of 20 characters.	N/A	StaffDemographic.CDSNumber <i>CSL_STAFF_DEMO_DISTRICT.</i> <i>INSTITUTION_CDS_NUMBER</i>
Physical Address					
21 physical address fields	Optional	Optional	The physical address for the staff member. See "Available Address Fields" on page 12.	Physical Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Mailing Address					
21 mailing address fields	Optional	Optional	The mailing address for the staff member, if it differs from the physical address. See "Available Address Fields" on page 12.	Mailing Address	Address <i>CSL_DIS_ADDRESS</i> Note Data is stored in multiple properties/fields in this schema/table.
Social Security Number	Optional	Optional	The staff member's social security number.	Social Security #	StaffDemographic.SocialSecurityNumber <i>CSL_STAFF_DEMO_DISTRICT.</i> <i>SOCIAL_SECURITY_NUMBER</i>
Previous SSN	Optional	Optional	The staff member's previous social security number.	Previous Social Security #	StaffDemographic.PreviousSSN <i>CSL_STAFF_DEMO_DISTRICT.</i> <i>PREV_SOCIAL_SEC_NO</i>
License Number	Optional	Optional	The staff member's license number.	License Number	StaffDemographic.LicenseNumber <i>CSL_STAFF_DEMO_DISTRICT.</i> <i>LICENSE_NUMBER</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Previous License Number	Optional	Optional	The staff member's previous license number.	Previous License Number	StaffDemographic. PreviousLicenseNumber <i>CSL_STAFF_DEMO_DISTRICT. PREV_LICENSE_NO</i>
Staff Licensure Check Code	Optional	Optional	The code for the staff member's licensure check. It is a maximum of 11 characters and must be a valid selection from the setup list. The default for districts that do not use this field is N/A.	Licensure Check	StaffLicensureCheck.Code <i>CSL_SET_LICENSURE_CHECK_TN. LICENSURE_CHECK_TN_CODE</i>
Staff Licensure Check Description	Optional	Optional	The description of the staff member's licensure check. It is a maximum of 45 characters and must be a valid selection from the setup list. The default for districts that do not use this field is N/A.	Licensure Check	StaffLicensureCheck.Description <i>CSL_SET_LICENSURE_CHECK_TN. LICENSURE_CHECK_TN_DESC</i>
Staff Number 1	Optional	Optional	An additional ID number for the staff member. It is a maximum of 20 characters.	Other Staff Number 1	StaffDemographic.StaffNumber1 <i>CSL_STAFF_DEMO_DISTRICT. STAFF_NUMBER_1</i>
Staff Number 2	Optional	Optional	An additional ID number for the staff member. It is a maximum of 20 characters.	Other Staff Number 2	StaffDemographic.StaffNumber2 <i>CSL_STAFF_DEMO_DISTRICT. STAFF_NUMBER_2</i>

Class Schedules

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a school administrator at a secondary school.
- 2** In the control bar, click Scheduling.
- 3** On the Scheduling page, under Step 5, click Master Schedule.
- 4** On the Master Schedule page, click Display All Records.
- 5** In the Course Search Results panel, click one of the classes and scroll to the bottom of the page.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School Number	Required	Required	A number used to uniquely identify a school within the district. It is a maximum of 9 characters. This field is used to select the school the data belongs to. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO.SCHOOL_CODE</i>
Course Number	Required	Required	A number used to uniquely identify a course at a school. It is a maximum of 12 characters. This field is used to select the course the data belongs to. The Course Number is not updated as part of this import.	N/A	CourseOffering.Number <i>CSL_SMS_COURSE_OFFERING.NUMBER</i>
Class Number	Required	Required	The number for the class, up to 4 digits.	Number	Class.Number <i>CSL_SMS_CLASS.CLASS_NUMBER</i>
Class Name	Required	Required	The name of the class. It is a maximum of 30 characters.	Name	Class.Name <i>CSL_SMS_CLASS.NAME</i>
School Calendar Name	Required	Required	The name of the associated school calendar. This field is used to identify the correct schedule for the student. The School Calendar is not updated as part of this import.	N/A	SchoolCalendar.Description <i>CSL_SMS_SCHOOL_CALENDAR.CALENDAR_DESC</i>
Class Capacity	Required	Required	The maximum capacity of the class.	Capacity	Class.Capacity <i>CSL_SMS_CLASS.CAPACITY</i>
Scheduling Group Name	Required	Required	A valid scheduling group at the specified school. It is a maximum of 30 characters.	Scheduling group	SchedulingGroup.Name <i>CSL_SMS_SCHEDULING_GROUP.NAME</i>
Term Set Name	Required	Required	A valid term set at the specified school. It is a maximum of 25 characters.	N/A	TermSet.Name <i>CSL_SMS_TERM_SET.NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Term Code	Required	Required	A valid term code at the specified school. It is a maximum of 3 characters.	Term	Term.Name <i>CSL_SMS_TERM.NAME</i>
Meeting Pattern Name	Required	Required	A valid meeting pattern at the specified school. It is a maximum of 25 characters.	Meeting pattern	MeetingPattern.Name <i>CSL_SMS_MEETING_PATTERN.NAME</i>
Building Number	Optional	Optional	The building number in which the class is located. It is a maximum of 5 characters. This field is used to select the room the class takes place in.	N/A	Building.Number <i>CSL_SMS_BUILDING.NUMBER</i>
Room Number	Optional	Optional	The room number in which the class is located. It is a maximum of 6 characters.	Room	Room.Number <i>CSL_SMS_ROOM.NUMBER</i>
Teacher 1 Staff Number	Optional	Optional	The number of the primary teacher for the class. It is a maximum of 9 characters.	Teacher	StaffDemographic.StaffNumber <i>CSL_STAFF_DEMO_DISTRICT.STAFF_NUMBER</i>
Teacher 2 Staff Number	Optional	Optional	The number of the secondary teacher for the class. It is a maximum of 9 characters.	Other teacher	StaffDemographic.StaffNumber <i>CSL_STAFF_DEMO_DISTRICT.STAFF_NUMBER</i>
Teacher 3 Staff Number	Optional	Optional	The number of the tertiary teacher for the class. It is a maximum of 9 characters.	Other teacher	StaffDemographic.StaffNumber <i>CSL_STAFF_DEMO_DISTRICT.STAFF_NUMBER</i>

Student Schedules

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a school administrator.
- 2** Switch to the planning calendar (if required).
- 3** In the planning calendar, search for a student record.
- 4** On the Student Search Results page, click the link for the student.
- 5** On the Student Demographics page, in the control bar, click Schedule.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property. Table.Field
School Number	Required	Required	A number used to uniquely identify a school within the district. It is a maximum of 9 characters. This field is used to select the school the data belongs to. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO. SCHOOL_CODE</i>
School Calendar Name	Required	Required	The name of the associated school calendar. This field is used to identify the correct schedule for the student. The School Calendar is not updated as part of this import.	N/A	SchoolCalendar.Description <i>CSL_SMS_SCHOOL_CALENDAR. CALENDAR_DESC</i>
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property. Table.Field
Course Number	Required	Required	A valid course number in the specified school.	Course Number	CourseOffering.Number <i>CSL_SMS_COURSE_OFFERING. NUMBER</i>
Class Number	Required	Required	A valid class number for the specified course number.	Class Number	Class.Number <i>CSL_SMS_CLASS.CLASS_NUMBER</i>

Student Course Requests

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a school administrator.
- 2 Switch to the planning calendar (if required).
- 3 In the planning calendar, search for a student record.
- 4 On the Student Search Results page, click the link for the student.
- 5 On the Student Demographics page, in the control bar, click Schedule.
- 6 Click the Course Requests tab.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
School Number	Required	Required	The number used to uniquely identify the school the student is assigned to. It is a maximum of 9 characters. This field is used to identify the correct schedule for the student. The School Number is not updated as part of this import.	N/A	School.Number <i>CSL_VW_SCHOOL_INFO.</i> <i>SCHOOL_CODE</i>
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the schedule belongs to. The Student Number is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT</i>
Course Number	Required	Required	A valid course number in the specified school. It is a maximum of 12 characters.	Course #	Subject.Number <i>CSL_SMS_SUBJECT.NUMBER</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Is Course Required	Required	Required	Indicates whether the course is required, either 0 (not required) or 1 (required). If this field is not included, the field will use the default from the Course Catalog.	Required	StudentRequest.RequestType <i>CSL_SMS_STUDENT_REQUEST.REQUEST_TYPE</i>
Alternate For	Optional	Optional	The number of another course already requested for this student. In other words, this request is an alternate for that specific course. It is a maximum of 12 characters.	Alternate For	Subject.Number <i>CSL_SMS_SUBJECT.NUMBER</i>
School Calendar Name	Required	Required	The name of the associated school calendar. It is a maximum of 20 characters. This field is used to identify the correct schedule for the student. The School Calendar is not updated as part of this import.	N/A	SchoolCalendar.Description <i>CSL_SMS_SCHOOL_CALENDAR.CALENDAR_DESC</i>
Priority	Optional	Optional	A number between 1 and 9999 indicating the request's priority against other requests. Smaller numbers receive preference when loading student schedules. If this field is left blank, it defaults to 10.	Priority	StudentRequest.Priority <i>CSL_SMS_STUDENT_REQUEST.PRIORITY</i>
Term Code	Optional	Optional	A valid term code. It is a maximum of 3 characters.	Term	Term.Code <i>CSL_SMS_TERM.CODE</i>
Term Set Name	Optional	Optional	The name of the term set. It is a maximum of 25 characters. This field is used to identify the correct schedule for the student. The term set is not updated as part of this import.	N/A	TermSet.Name <i>CSL_SMS_TERMSET.NAME</i>
Term Choice Option	Optional	Optional	Whether the term is a Preference (P) or an Override (O). If the field is not provided, it defaults to P.	N/A	StudentRequest.TermChoiceOption <i>CSL_SMS_STUDENT_REQUEST.TERM_CHOICE_OPTION</i>

Address Ranges

Note

To access Address Range pages, on the District Preferences page, in the Address Validation panel, ensure "Use Address Validation" is selected.

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district administrator.
- 2 In the control bar, click District Setup.
- 3 On the District Setup page, under District, click Address Validation Setup.
- 4 On the Address Validation Setup page, under Step 4, click Address Ranges.
- 5 On the Address Ranges page, from the Actions menu, click Add Address Range.

OR

Click the link for one of the records.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property <i>Table.Field</i>
Operation	Required	Required	This is a record-level add/update/delete function. This field does not display in the interface. Each address range import file must include a column that specifies A (add), U (update), or D (delete) for each address field.	N/A	N/A

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
District Calendar	Required	Required	The name of the district active or planning calendar the address ranges apply to. This field is used to select the calendar the data belongs to. The District Calendar is not updated as part of this import.	N/A	DistrictCalendar.Description <i>CSL_DISTRICT_CALENDAR. DESCRIPTION</i>
Range Number	Optional	Optional	The number used to uniquely identify the address range.	Range no.	AddressRule.AddressRangeNo <i>CSL_SMS_ADDRESS_RULE. ADDRESS_RULE_NUMBER</i>
From	Required	Required	A number that defines the house the address range starts with.	Address no range from	AddressRule.AddressNumberMin <i>CSL_SMS_ADDRESS_RULE. ADDRESS_NUMBER_MIN</i>
To	Required	Required	A number that defines the house the address range ends with.	to	AddressRule.AddressNumberMax <i>CSL_SMS_ADDRESS_RULE. ADDRESS_NUMBER_MAX</i>
All/Even/Odd	Required	Required	Must be one of these values: <ul style="list-style-type: none"> • All • Even • Odd Defines which numbers within the address range are included.	Odd/Even	AddressRule.AddressNumberType <i>CSL_SMS_ADDRESS_RULE. ADDRESS_NUMBER_TYPE</i>
Street Name	Required	Required	The name that identifies the street address of the address range. It is a maximum of 30 characters.	Street name	AddressRule.StreetName <i>CSL_SMS_ADDRESS_RULE. STREET_NAME</i>
Street Type	Optional	Optional	The description of the type of address: street, avenue, drive, etc. It is a maximum of 29 characters and must be a valid selection from the Address Type setup list.	Type	AddressType.Description <i>CSL_SET_ADDRESS_TYPE. ADDRESS_TYPE_DESC</i>
Direction Suffix	Optional	Optional	The direction for the address, such as West. It is a code of a maximum of 4 characters or a description of a maximum of 35 characters and must be a valid selection from the Address Direction setup list.	Dir.	AddressDirection.Code or Description <i>CSL_SET_ADDRESS_DIRECTION. ADDRESS_DIRECTION_CODE or DESC</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
City	Required	Required	The name of the city the address range belongs to. It is a maximum of 35 characters and must be a valid selection from the City setup list.	City	City.Description <i>CSL_SET_CITY.CITY_DESC</i>
State	Required	Required	The name for the state the address range belongs to. It is a maximum of 35 characters and must be a valid selection from the State setup list.	State	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Zip Code	Required	Required	Any valid zip code or postal code. It is a maximum of 13 characters.	Zip Code	AddressRule.ZipCode <i>CSL_SMS_ADDRESS_RULE. ZIP_CODE</i>
Geocode	Required	Required	A unique value that identifies a location on the Geocode Map. It is a maximum of 11 characters and must be a valid selection from the Geocode setup list.	Geocode	Geocode.Code <i>CSL_SET_GEOCODE. GEOCODE_CODE</i>
Description	Optional	Optional	A description of the address range. It is a maximum of 100 characters.	Description	AddressRule.Description <i>CSL_SMS_ADDRESS_RULE. ADDRESS_RULE_DESC</i>

Student Test Results

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1** Log on as a district or school administrator.
- 2** Search for a student record.
- 3** On the Student Search Results page, click the link for the student.
- 4** On the Student Demographics page, in the control bar, click Test Results.
- 5** On the Student Test Results page, from the Actions menu, click Add Test Results.

OR

Click the link for one of the records.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property <i>Table.Field</i>
Select Test Session> Session Name	Required	Required	The name of the session in which the student took the test. This field is used to determine the student's eligibility for the test, and the norming data associated with the session.	Test Session	TMTestSession.SessionName <i>CSL_SMS_TM_STUDENT_TEST_SESSION.SESSION_NAME</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
General					
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student ID is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT_NUMBER</i>
Test Result Date	Required	Required	The date on which the student wrote the test. This field is used to determine the student's eligibility for the test session.	Date	TMStudentTestResult.TestResultDate <i>CSL_SMS_TM_STUDENT_TEST_RESULT.TEST_RESULT_DATE</i>
School Type	Required	Required	Select one of: <ul style="list-style-type: none"> • Home school (1) • In district school (2) • Out of district school (3) Setting the value to 2 or 3 makes the School Name field required.	School	TMStudentTestResult.SchoolType <i>CSL_SMS_TM_STUDENT_TEST_RESULT.SCHOOL_TYPE</i>
School Name	Optional	Optional	The name of the school in which the student was enrolled at the time the test was taken.	School	TMStudentTestResult.SchoolName <i>CSL_SMS_TM_STUDENT_TEST_RESULT.SCHOOL_NAME</i>
Exemption	Optional	Optional	Indicates whether the student is exempt from the test, either 0 (no) or 1 (yes).	Exemption	TMStudentTestResult.IsExemptionWaiveTest <i>CSL_SMS_TM_STUDENT_TEST_RESULT.IS_EXEMPTION_WAIVE_TEST</i>
Exemption Reason Description	Optional	Optional	The description of the exemption reason. It is a maximum of 45 characters and must be a valid selection from the Exemption Reason setup list. The default for districts that do not use this field is N/A.	Exemption Reason	ExemptionReason_Description <i>CSL_SET_EXEMPTION_REASON_EXEMPTION_REASON_DESC</i>
Comment	Optional	Optional	Any comments associated with the student's test results as a whole.	Comment	TMStudentTestResult.Comment <i>CSL_SMS_TM_STUDENT_TEST_RESULT.COMMENT</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
<test name> Test Score (repeat the following for each test score type to a maximum of 5)					
<test score type>	Optional	Optional	The score for the score type.	<i>Grid cell</i>	TMTestResultTestScore.TestScoreValue or AlphaTestScoreValue CSL_SMS_TM_TEST_RESULT_TEST_SCORE.TEST_SCORE_VALUE or ALPHA_TEST_SCORE_VALUE
<test name> Subtest <subtest name> (repeat the following for each subtest score type to a maximum of 5)					
<subtest score type>	Optional	Optional	The score for the score type.	<i>Grid cell</i>	TMTestResultSubtestScore.SubtestScoreValue or AlphaSubtestScoreValue CSL_SMS_TM_TEST_RESULT_SUBTEST_SCORE.SUBTEST_SCORE_VALUE or ALPHA_SUBTEST_SCORE_VALUE
<test name><subtest name><skill name>(repeat the following for each skill up to a maximum of 5)					
<skill score type>	Optional	Optional	The score for the score type.	<i>Grid cell</i>	TMTestResultSkillScore.SkillScoreValue or AlphaSkillScoreValue CSL_SMS_TM_TEST_RESULT_SKILL_SCORE.SKILL_SCORE_VALUE or ALPHA_SKILL_SCORE_VALUE

Historical Graduation Information

TO NAVIGATE TO THE LOCATION OF THE FIELDS COVERED BY THIS RECORD TYPE:

- 1 Log on as a district or school administrator.
- 2 Search for a student record.
- 3 On the Student Search Results page, click the link for the student.
- 4 On the Student Demographics page, in the control bar, click Historical.
- 5 On the Historical page, click the Edit link.

The following fields are supported by this record type:

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Student					
Student Number	Required	Required	An ID used to uniquely identify a student within the district. It is a maximum of 15 characters. This field is used to select the student the data belongs to. The Student Number is not updated as part of this import.	N/A	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT. NUMBER</i>
Program Type	Required	Required	Indicates the program type, such as “Accelerated” or “Regular”.	Program Type	HistoricalSummary.ProgramType <i>CSL_STD_HISTORICAL_SUMMARY. PROGRAM_TYPE</i>
High School Enrollment Date	Optional	Optional	The date the student entered high school.	High School Enrollment Date	HistoricalSummary.HighSchoolEnrollDate <i>CSL_STD_HISTORICAL_SUMMARY. HIGH_SCHOOL_ENROLL_DATE</i>
Graduation Date	Optional	Optional	The official date the student graduated from high school.	Graduation Date	HistoricalSummary.GraduationDate <i>CSL_STD_HISTORICAL_SUMMARY. GRADUATION_DATE</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Coursework Completion Date	Optional	Optional	The date the student actually completed all coursework, but not necessarily the tests, required for graduation.	Coursework Completion Date	HistoricalSummary.CourseworkCompletionDate <i>CSL_STD_HISTORICAL_SUMMARY.CRSWRK_COMPLETION_DATE</i>
Graduation Status	Optional	Optional	A description of the student's graduation status.	Graduation Status	HistoricalSummary.GraduationStatus <i>CSL_STD_HISTORICAL_SUMMARY.GRADUATION_STATUS</i>
Grant Eligibility	Optional	Optional	Indicates whether the student is eligible for grants. Eligibility is usually associated with the program type taken by the student.	Grant Eligibility	HistoricalSummary.GrantEligibility <i>CSL_STD_HISTORICAL_SUMMARY.GRANT_ELIGIBILITY</i>
Total Absences	Optional	Optional	The number of absences the student had in all school years.	Total Absences	HistoricalSummary.TotalAbsent <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_ABSENT</i>
Total Potential Credits	Optional	Optional	The total number of credits the student could earn in all school years.	Total Credits: Potential	HistoricalSummary.TotalPotentialCredits <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_POTENTIAL_CREDITS</i>
Total Earned Credits	Optional	Optional	The total number of credits the student actually earned in all school years.	Total Credits: Earned	HistoricalSummary.TotalCreditsEarned <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_CREDITS_EARNED</i>
Total State Credits	Optional	Optional	The total number of credits the student earned for state courses in all school years.	Total Credits: State	HistoricalSummary.TotalStateCreditsEarned <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_STATE_CREDITS_EARNED</i>
Total Local Credits	Optional	Optional	The total number of credits the student earned for local courses in all school years.	Total Credits: Local	HistoricalSummary.TotalLocalCreditsEarned <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_LOCAL_CREDITS_EARNED</i>
Cumulative GPA Unweighted	Optional	Optional	The student's unweighted GPA for all schools years.	Cumulative GPA Unweighted	HistoricalSummary.CumulativeGPA <i>CSL_STD_HISTORICAL_SUMMARY.CUMULATIVE_GPA</i>

Import Field	Add	Update	Description	UI Field Name	Schema.Property Table.Field
Cumulative GPA Weighted	Optional	Optional	The student's weighted GPA for all schools years.	Cumulative GPA Weighted	HistoricalSummary.CumulativeWeightedGPA <i>CSL_STD_HISTORICAL_SUMMARY.CUMULATIVEWEIGHTED_GPA</i>
Potential Credits for Cumulative GPA Unweighted	Optional	Optional	The total number of unweighted potential credits the student could earn for his or her cumulative GPA.	Potential Credits for Cumulative GPA Unweighted	HistoricalSummary.UnWeightedPotentialCeditsCGPA <i>CSL_STD_HISTORICAL_SUMMARY.POTENTIAL_CR_CGPA_UNWEIGHTED</i>
Potential Credits for Cumulative GPA Weighted	Optional	Optional	The total number of weighted potential credits the student could earn for his or her cumulative GPA.	Potential Credits for Cumulative GPA Weighted	HistoricalSummary.WeightedPotentialCeditsCGPA <i>CSL_STD_HISTORICAL_SUMMARY.POTENTIAL_CR_CGPA_WEIGHTED</i>
Total Points Uweighted	Optional	Optional	The total number of unweighted points the student earned in all school years.	Total Points Uweighted	HistoricalSummary.TotalUnweightedGradePoints <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_GRADE_POINTS_UNWEIGHTED</i>
Total Points Weighted	Optional	Optional	The total number of weighted points the student earned in all school years.	Total Points Weighted	HistoricalSummary.TotalWeightedGradePoints <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_GRADE_POINTS_WEIGHTED</i>
Total Number of Grades Unweighted	Optional	Optional	The total number of unweighted grades for the student in all school years.	Total Number of Grades Unweighted	HistoricalSummary.TotalUnweightedNumberOfGrades <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_NUMBER_GRADES_UNWEIGHTED</i>
Total Number of Grades Weighted	Optional	Optional	The total number of weighted grades for the student in all school years.	Total Number of Grades Weighted	HistoricalSummary.TotalWeightedNumberOfGrades <i>CSL_STD_HISTORICAL_SUMMARY.TOTAL_NUMBER_GRADES_WEIGHTED</i>

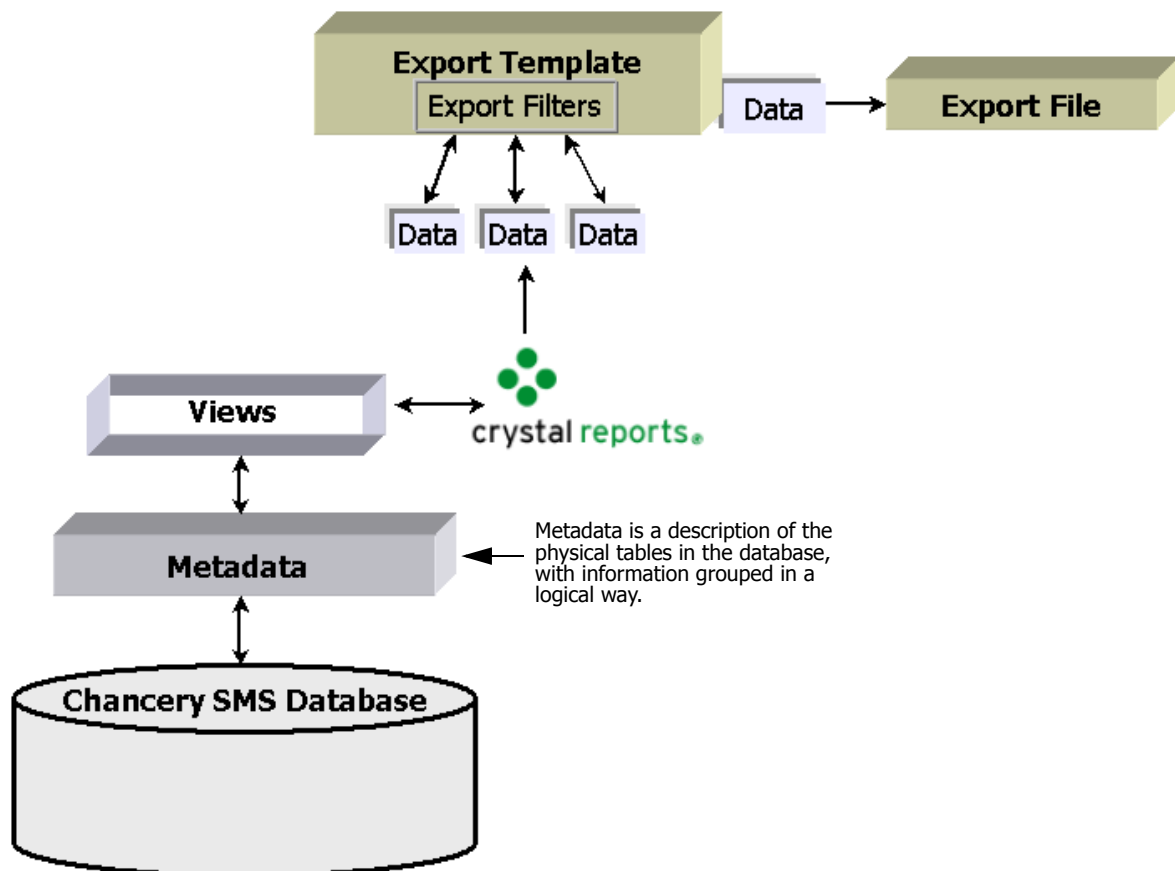
EXPORTING DATA

To export data from a Chancery SMS database, you create an export template by using Crystal Reports to connect to the appropriate database and select and link Data Access Views (Views).

Views enable Crystal Reports to interpret the Chancery SMS metadata. Each View contains a selection of fields in a related area that may come from a single table or a collection of tables. When data comes from multiple tables, Views can be linked together in Crystal Reports.

Export templates come with filters that allow you to select the precise data you want to export. When you upload the export template to Chancery SMS, the Views become available for filtering. You can specify default filters when you upload the template; users can also choose their own filters at run-time.

The following diagram illustrates the process of creating an export template:



This chapter provides basic instructions for creating custom export templates. For further information about using Crystal Reports and Views, see the Chancery SMS Report Writer Guide.

Note

Views are available only for tables in the database for which metadata exists. This means that data from some of the tables related to selected district-only information and Custom Data Management (Student Data) cannot be exported. If you need to export data that cannot be accessed through the Data Access Views, contact Customer Services at 1-800-999-9931.

Chancery SMS also includes built-in export templates for the following third-party applications:

- HealthOffice 2000 Enterprise from Health Master tracks medical information.
- SETS (Special Education Tracking System) from 4GL Student Solutions tracks special education information.

Regardless of whether you are using a built-in or custom export template, you can export data immediately or schedule it to be exported at a predefined time. For further information, see “Scheduling a Custom Export and Selecting Output Options” on page 128.

Permission to Export

You need various permissions in Chancery SMS to work with exports, depending on what you want to do:

To	You need this permission	Set to
Create an export template	Export >Create Custom Exports	Yes
Export to a file	Export>Output Exports to File	Yes
Export to HealthOffice or SETS	Export>Schedule HealthOffice\SETS Exports	Yes
Schedule an export	Export>Schedule Exports	Yes

For more information about permissions, see “Controlling User Access” in the Chancery SMS District Administration Guide.

Creating a Custom Export Template

To create a custom export template using Views and add it to Chancery SMS, you need:

- Crystal Reports version 9
- the name of the server that the Chancery SMS data access database is on
- a user ID and password for the Chancery SMS data access database
- the name of the Chancery SMS data access database

Creating an export template involves connecting to the database, selecting your Views, and linking them logically.

To illustrate the process of creating a custom export template, the following sections in this chapter provide an example of how you would create a sample export that provides the last name, first name, birthdate, gender, and ethnic category for all students in a school.

Connecting to the Database



To access the data for an export template, you need to connect to the database. You do this by specifying the server and database name in Crystal Reports, which allows you to use Data Access Views. You then use Views to access and link the appropriate tables so that you can select the fields you need to export from.

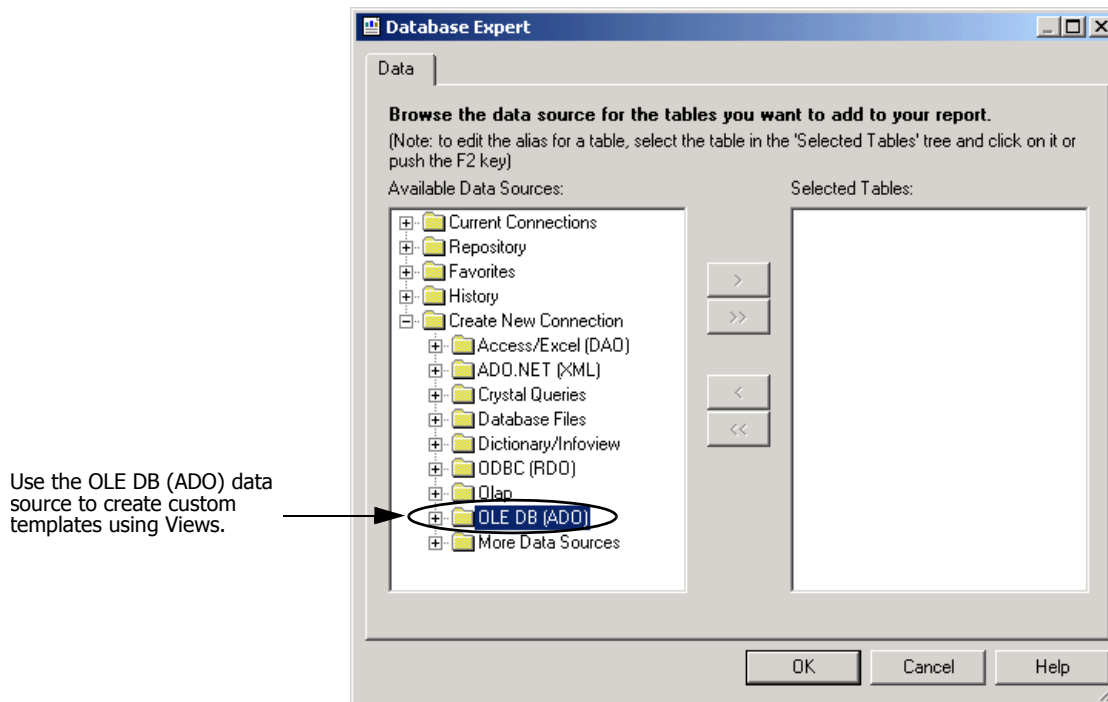
TO CONNECT TO THE DATABASE:

- 1 Start Crystal Reports 9.
- 2 In the Welcome to Crystal Reports dialog, click “As a Blank Report” and click OK.

OR

From the File menu, click New.

- 3 In the Database Expert dialog, under Available Data Sources, click  next to Create New Connection.
- 4 In the Create New Connection folder, click  next to OLE DB (ADO).

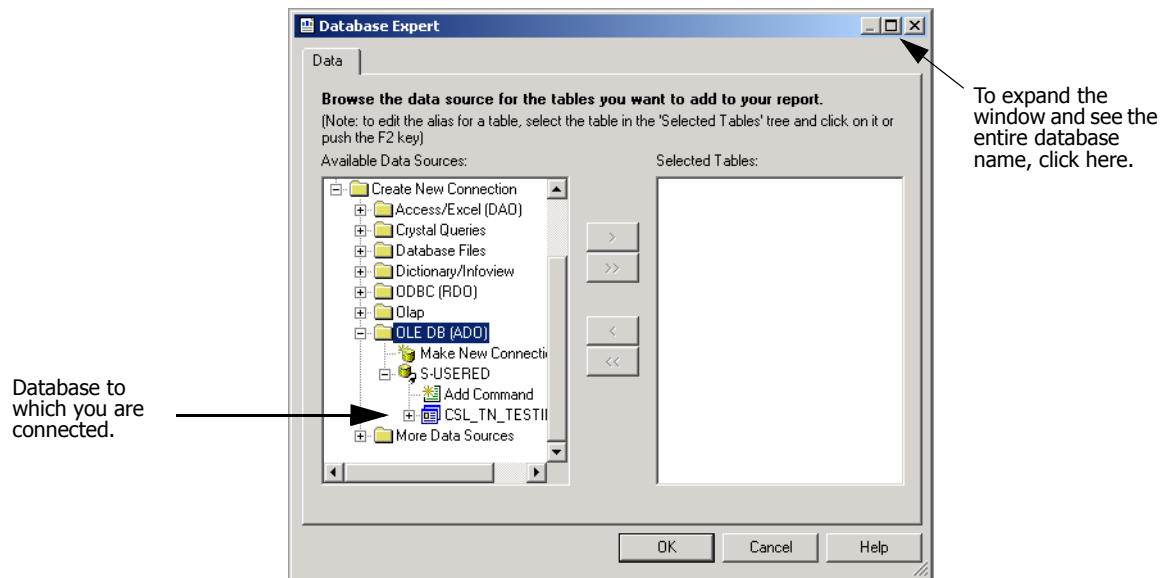


- 5 In the OLE DB (ADO) dialog, in the Provider list, select “Microsoft OLE DB Provider for SQL Server”. Click Next.
- 6 In the next OLE DB (ADO) dialog, in the Connection Information section, enter the following information:

Field	Description
Server	Enter the name of the server where the data access database resides. This is specific to your district.
User ID	Enter the user ID of a user account that permits you to connect to the data access database.
Password	Enter the password of a user account that permits you to connect to the data access database.
Database	Enter the name of the data access database, which always ends with “_DA”. For example, CSL_SMS_DA.

- 7 Click Finish.

The Available Data Sources list now shows the database to which you are connected.



Linking Views

Typically, data being exported comes from multiple tables. This means the associated Views must be linked together to ensure all required data is exported. Linking is a drag and drop procedure in which you drag the ID field from one View and drop it on the ID field in another, creating a link between the two.

The first step of the process is to determine the View that the entire template will be based on. This View is known as the “Root View”. All the links between Views move outward from this Root View.

To ensure your template will work as expected, the following rules must be adhered to while setting up your links:

- One and only one View (the root view) must have only outgoing links and no incoming links.
- View links must not form any circular path (a path that starts at one view and leads back to the same view). If necessary, you can create a copy of a View that you have already used and create an alias for it. This allows you to continue moving in a linear path. For further information, see the Chancery SMS Report Writer Guide.
- Links between Views must only be made on valid ID fields.
- The maximum number of links allowed from one View to another is two; one for the ID link and one for the QUID (QueryID) link.

The following procedures illustrate how you would link Views to create a sample export template to export the last name, first name, birthdate, gender, and ethnic category for all students in a school.

TO LINK VIEWS

- 1 Connect to the database using Crystal Reports. See “Connecting to the Database” on page 113.
- 2 In the Available Data Sources list, click **+** next to the database name.

Note

All views end with “_DA”

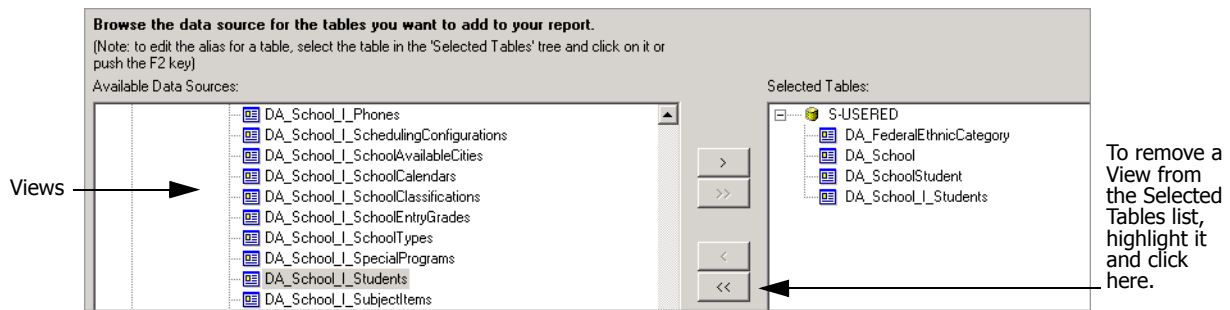
- 3 Click each View you want to use for the export then click **>** to move it to the Selected Tables list.

OR

Double-click each View.

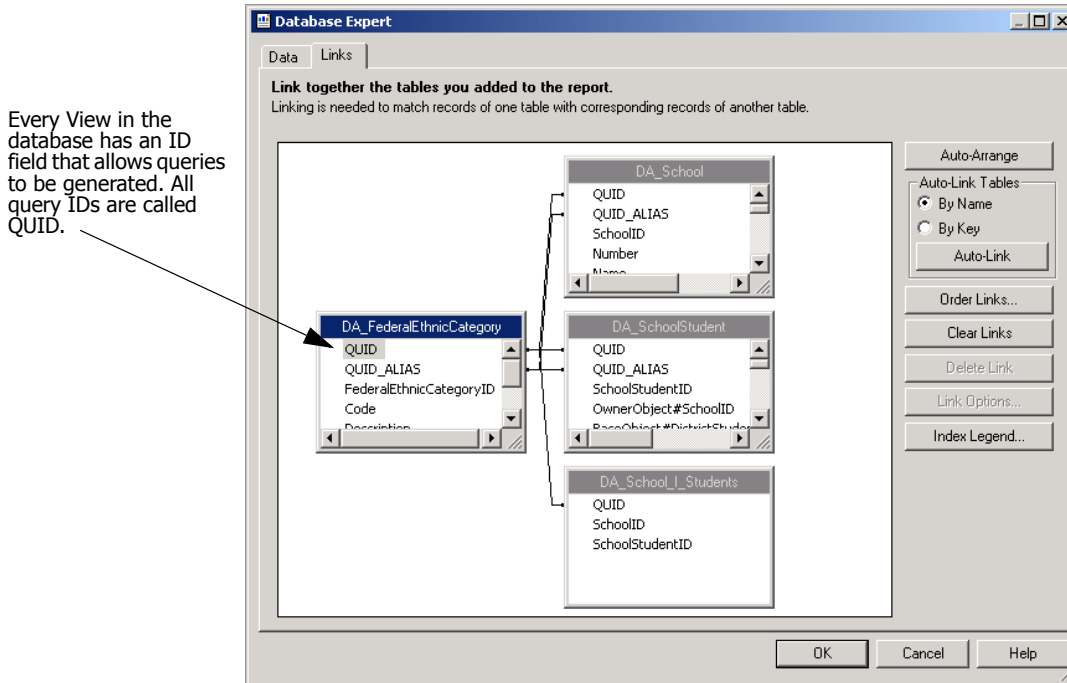
For the sample export template, you would select the following Views:

- DA_FederalEthnicCategory
- DA_School
- DA_School_I_Students
- DA_SchoolStudent



- 4 Click OK.

The dialog displays a Links tab that shows a diagram of the Views you chose and the fields they share.



- 5 Click Clear Links. Click Yes to confirm.
- 6 Re-order the Views so the links will all move from left to right.

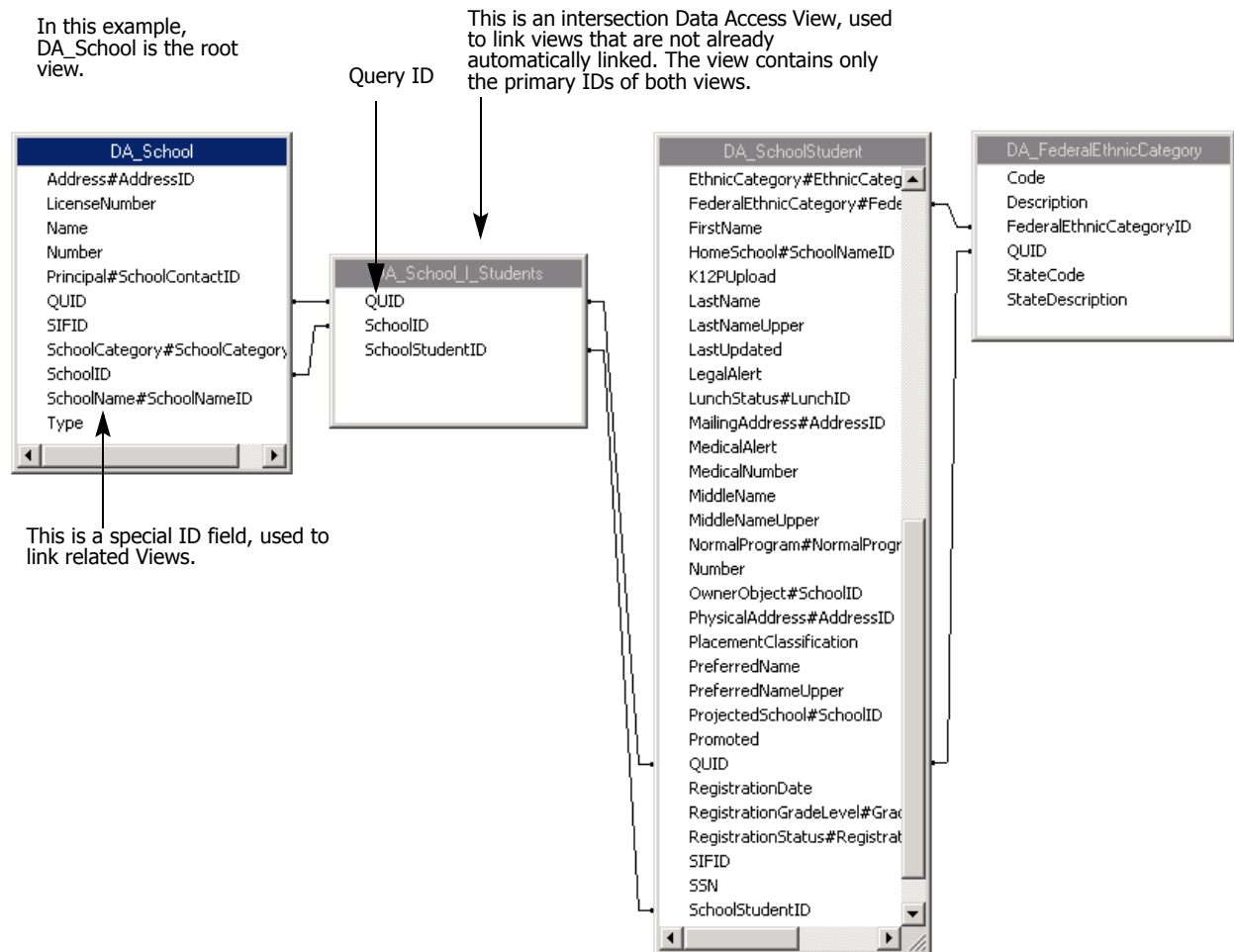
For the sample export template, you would arrange the Views in the following order from left to right:

- DA_School
 - DA_School_I_Students
 - DA_SchoolStudent
 - DA_FederalEthnicCategory
- 7 Link the views by dragging a field in one View to the field of the same name in another view, depending on the type of information you want. Click OK.

For the sample export template, the following links would need to exist.

Drag this field	To this field
SchoolID in DA_School	SchoolID in DA_School_I_Students
SchoolStudentID in DA_School_I_Students	SchoolStudentID in DA_SchoolStudent

FederalEthnicCategory# FederalEthnicCategoryID in DA_SchoolStudent	FederalEthnicCategoryID in DA_FederalEthnicCategory
QUID in DA_School	QUID in DA_School_I_Students
QUID in DA_School_I_Students	QUID in DA_SchoolStudent
QUID in DA_SchoolStudent	QUID in DA_FederalEthnicCategory



- 8 In the Crystal Reports window, from the View menu, click Field Explorer
- 9 In the Field Explorer pane, click **+** next to Database Fields and expand each Data Access View you added to the template.
- 10 Click and drag the fields you want to export from the Database Fields to the Details section on the Design tab in the order you want the information exported.

For the sample export template, you would click and drag the following fields to the Details section:

Data Access View	Field
DA_SchoolStudent	<ul style="list-style-type: none"> • LastName • FirstName • BirthDate • Gender
DA_FederalEthnicCategory	Description

- 11** From the File menu, click Save.
- 12** In the Save As dialog, navigate to the appropriate location, enter a name for the export template in the File name field, and click Save. Close Crystal Reports.

Adding an Export Template to Chancery SMS

Adding an export template to Chancery SMS involves selecting the export template, defining permissions for users of the export, and setting export filters.

Adding a Template and Defining Permissions

Before you add an export template to Chancery SMS, ensure it has been created and that you know the location of the file. For instructions on creating an export template, see “Creating a Custom Export Template” on page 112.

Export Template permissions default from the general system permissions. For each export template, you can change these permissions so that users of a particular role can modify the template.

TO ADD THE TEMPLATE:

- 1** Log on to Chancery SMS as a district administrator.
- 2** In the control bar, under Admin, click District Setup.
- 3** On the District Setup page, under Tools, click Customize Exports.
- 4** On the Custom Exports page, from the Actions menu, click Add Export.

- On the Add Export page, in the General area, specify the following information:

Field	Description
Export Name	Enter the name of the export template you created in “Creating a Custom Export Template”: This is the name that will display in the export list.
Description	Enter a description of the export template for internal purposes.
Category	Select a category from the dropdown, or click New and enter a new category name. The category groups similar export templates together in the export list.
Export Weight	Select whether the export is heavyweight or lightweight, depending on the system resources the export requires to run. Note This setting determines what type of task is generated for the export in the Task Manager. If an export is taking longer to generate than it should or is blocking other transactions from completing, consider changing the export weight.

District Setup > Customize Exports > Add Export

Help ▾

Add Export

General

*Export Name:

Description:

*Category: Select: ▾

New:

*Export Weight: Light


Heavy

- In the Export File panel, click Browse, navigate to the export template you want to add, and click Open.

Export File

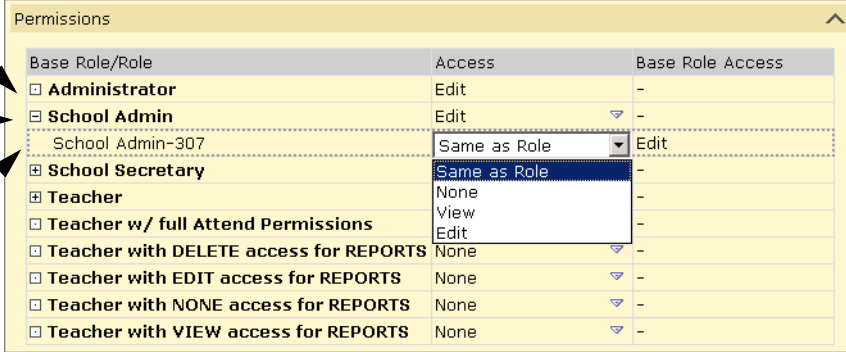
*New export file (.rpt):

- In the Permissions area, identify the base roles and roles that can Delete, Edit, or View the export template.

Click  to view the roles in a base role.

Set the permissions for a base role.

Set the permissions for a role.



Base Role/Role	Access	Base Role Access
<input type="checkbox"/> Administrator	Edit	-
<input type="checkbox"/> School Admin	Edit	-
School Admin-307	Same as Role	Edit
<input type="checkbox"/> School Secretary	Same as Role	-
<input type="checkbox"/> Teacher	None	-
<input type="checkbox"/> Teacher w/ full Attend Permissions	View	-
<input type="checkbox"/> Teacher with DELETE access for REPORTS	Edit	-
<input type="checkbox"/> Teacher with EDIT access for REPORTS	None	-
<input type="checkbox"/> Teacher with NONE access for REPORTS	None	-
<input type="checkbox"/> Teacher with VIEW access for REPORTS	None	-

- Click OK.

Note

If the export template has been created incorrectly (e.g., if the links between Views go in more than one direction), the template will not upload. You will receive a system message outlining the error in the template. If you receive an error message, you must fix the template in Crystal Reports and then attempt to upload the file again. Only the first error the system finds will display; any subsequent errors will display only after the first issue is resolved.

Setting Export Filters

The Export Filters page allows you to define the specific data to be exported. The options available in the Export Filters dialog are generated from the Views you selected when you created your export template in Crystal Reports.

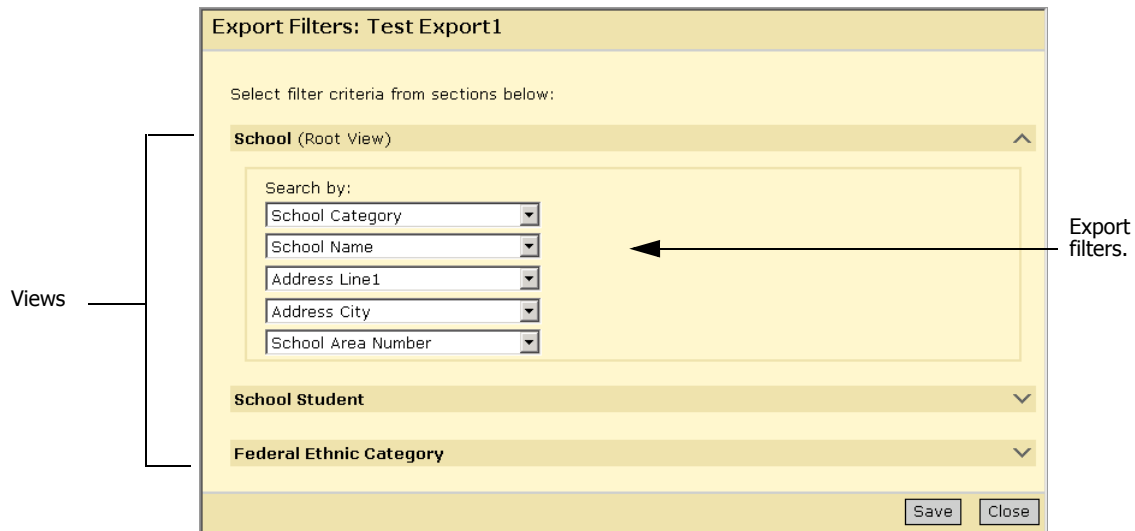
For each Data Access View, you can select up to five of the available fields to act as filters for your export. For example, in the sample export you would select the filters Last Name, First Name, Birth Date, and Gender from the School Student View. The Federal Ethnicity Category filter would also be available from this View because the DA_SchoolStudent and DA_FederalEthnicityCategory views were linked during the tasks performed in “Creating a Custom Export Template” on page 112.

When users run the export, these filters appear in the Export Options window.

TO SET THE EXPORT FILTERS:

- In the control bar, under Admin, click District Setup.
- On the District Setup page, under Tools, click Customize Exports.
- Add the export template. See “Adding a Template and Defining Permissions” on page 119.

- 4 On the Custom Exports page, select the export. From the Actions menu, click Edit Filters.
- 5 On the Export Filters dialog, expand the panel for the appropriate View.



- 6 From the available dropdowns, select the appropriate filter.
- 7 Repeat steps 2 and 3 as required for each View.
- 8 Click Save and click Close.

Modifying Custom Export Templates

The built-in export template for HealthOffice and SETS cannot be modified. However, any custom export templates are fully customizable—you can add or delete Views and fields.

To change an export template, modify it using Crystal Reports then add the revised template to Chancery SMS in place of the existing template.

Updating a Template

To update an export template, modify it in Crystal Reports and resave it with the same name.






- 1 Start Crystal Reports 9.

- 2 In the Welcome to Crystal Reports dialog, select the export template and click OK.

OR

From the File menu, click Open and, in the Open dialog, navigate to the export template you want to modify and click Open.

- 3 Do one of the following:

To	Do this
Add a Data Access View and Fields	<ol style="list-style-type: none"> 1 From the Database menu, click the Database Expert. 2 Under Available Data Sources, click  next to Create New Connection, and then click  next to OLE DB (ADO). 3 In the OLE DB (ADO) dialog, in the Provider list, click “Microsoft OLE DB Provider for SQL Server.” Click Next. 4 On the Connection Information page, complete the fields and click Finish. 5 Under OLE DB (ADO), under the server name, click  next to the database name. 6 Under Available Data Sources, double-click the appropriate views. Remember to add the intersection view, if necessary. Click OK. 7 On the Link page, ensure the appropriate links exist. If the links are incorrect or missing, click Clear Links, and create the links by dragging a field from one view to the corresponding field in the other view. Then, link the QUID fields for the Views. Click OK. 8 If you want to add a field, in the Field Explorer window, click  next to Database Fields and open the appropriate view. 9 Click and drag the appropriate fields to the Design window.
Add fields only	<ol style="list-style-type: none"> 1 in the Field Explorer window, click  next to Database Fields and open the appropriate view. 2 Click and drag the appropriate fields to the Design window.
Change links	<ol style="list-style-type: none"> 1 From the Database menu, click the Database Expert. 2 In the Database Expert, click the Links tab. 3 Update the links as required by dragging a field from one view to the corresponding field in the other view and click OK. 4 In the Crystal Reports window, from the File menu, click Save.

- 4 In the Crystal Reports window, from the File menu, click Save.
- 5 In the confirmation dialog, click OK.

Changing Export Filters

For any export built with Views, you can change the filter options.

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Customize Exports.
- 3 On the Custom Exports page, select the export. From the Actions menu, click Edit Filters.
- 4 On the Export Filter dialog, expand the panel for the appropriate Database Access View.
- 5 From the available dropdowns, select the appropriate filters.
- 6 Click Save, and then click Close.

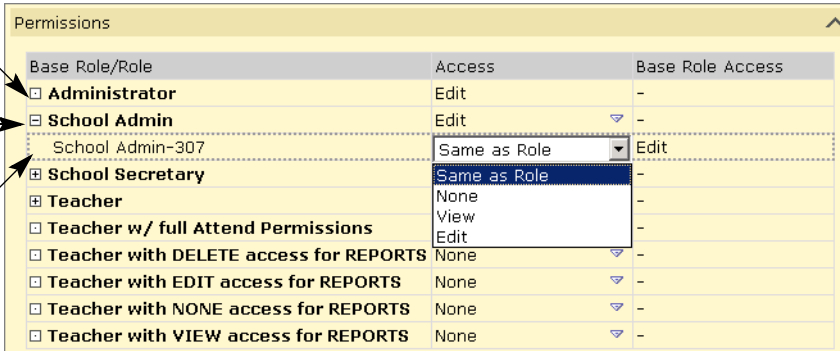
Modifying Template Permissions

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Customize Exports.
- 3 On the Custom Exports page, select the export. From the Actions menu, click Edit Export.
- 4 On the Edit Export page, in the Permissions area, identify the base roles and roles that can Delete, Edit, or View the export.

Click **+** to view the roles in a base role.

Set the permissions for a base role.

Set the permissions for a role.



Base Role/Role	Access	Base Role Access
<input type="checkbox"/> Administrator	Edit	-
<input type="checkbox"/> School Admin	Edit	-
School Admin-307	Same as Role	Edit
<input type="checkbox"/> School Secretary	Same as Role	-
<input type="checkbox"/> Teacher	None	-
<input type="checkbox"/> Teacher w/ full Attend Permissions	View	-
<input type="checkbox"/> Teacher with DELETE access for REPORTS	Edit	-
<input type="checkbox"/> Teacher with DELETE access for REPORTS	None	-
<input type="checkbox"/> Teacher with EDIT access for REPORTS	None	-
<input type="checkbox"/> Teacher with EDIT access for REPORTS	None	-
<input type="checkbox"/> Teacher with NONE access for REPORTS	None	-
<input type="checkbox"/> Teacher with NONE access for REPORTS	None	-
<input type="checkbox"/> Teacher with VIEW access for REPORTS	None	-
<input type="checkbox"/> Teacher with VIEW access for REPORTS	None	-

You can specify access for each base role or for the roles within it. Click **+** to display the roles in the base role.

- 5 Click OK.

Deleting a Template

You can delete custom export templates from Chancery SMS, assuming that your user account has Delete permissions for that export.

When you delete an export it is no longer available for users to run and is no longer on the Chancery SMS database server.

TO DELETE A TEMPLATE:

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Customize Exports.
- 3 On the Custom Exports page, select the export. From the Actions menu, click Delete Export.

Schema Help

The Data Access Layer makes data in the entire Chancery SMS database available for exporting. This significantly increases your ability to create custom exports that reflect the needs of your district and school.

However, with the sheer volume of information available, it can be difficult to find the Views and fields that contain the specific data you require. To assist you in this, schema help is provided.

Schema help allows you to select a schema (a logical grouping of records, such as SchoolStudent, Address, or Federal Ethnic Category) and view key information about that schema.

TO VIEW THE SCHEMA HELP:

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Customize Exports.
- 3 On the Customize Exports page, from the Actions menu, click Export Schema Help.

- On the Schema Help page, in Schema dropdown, select the schema that represents the group of records you want to view.

Select a schema from the dropdown list below to see its properties and how you can use them in templates.

Schema: View: DA_School Total: 20

Property	Field	Help
Address	Address#AddressID	To access the [Address] property of the [School] schema, join the [DA_School] view with the [DA_Address] view on the fields [Address#AddressID] and [AddressID] respectively.
AttendanceCodes	AttendanceCode	To access the [AttendanceCodes] property of the [School] schema, join the [DA_School] view with the [DA_School_I_AttendanceCodes] view on the fields [SchoolID] and [SchoolID] respectively. Then join the [DA_School_I_AttendanceCodes] view with the [DA_AttendanceCode] view on the fields [AttendanceCodeID] and [AttendanceCodeID] respectively

The following information is available:

Field	Description
View	The Data Access View name for the selected schema.
Property	A particular type of information that is shared by entities in a schema. The Property column displays all of the properties in that particular schema in alphabetical order. Scroll through the list to find the property you want to include in your export.
Field	Indicates which field the property is attached to. There may be key differences between the name of the property and the name of the related field.
Help	Provides instructions for how to include the property for a particular schema in a template. The instructions indicate which Views need to be connected to the data access view for that schema using which reference IDs and intersection views. If the Help field is empty for a property, the property is a field in the Data Access View and can be added directly to the template. The Help column also provides hyperlinks to the schemas associated with the selected schema.

Exporting Data Using Custom Templates

General export functionality is available that allows you to use export templates designed for the requirements of a particular district, school, or user. To export data, perform the following tasks:

- Select the custom export template you want to use for your export. For information about creating export templates, see “Creating a Custom Export Template” on page 112.
- Set filters to select the data you want to export. For further information see “Setting Custom Export Filters” on page 127 and “Changing Export Filters” on page 124
- Set the time frame in which you want the export to occur. See “Scheduling a Custom Export and Selecting Output Options” on page 128.
- Specify in what format you want to export the data. See “Scheduling a Custom Export and Selecting Output Options” on page 128.

Setting Custom Export Filters

Default filters are created when the custom export template is built. You can further define these filters using operators, such as “is less than” or “equals”, to specify the parameters for your export.

TO SET EXPORT FILTERS:

- 1 Log on to Chancery SMS as a district administrator.
- 2 In the control bar, under Admin, click Exports.
- 3 On the Exports page, click the name of the export you want to run.

The Export Options <export template name> window opens.

Export Options: Library Pro Export
Basic Demographics for Library Pro system.

Filters ^

Select filter criteria from sections below:

School Student (Root View) v


Grade v

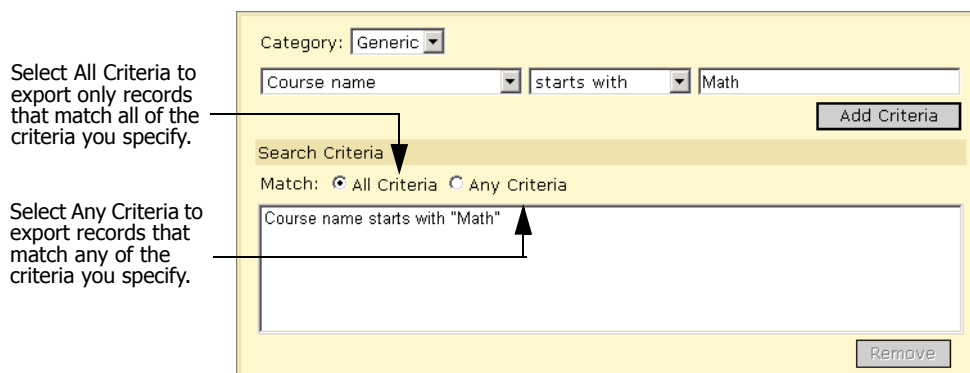
Home Room v

Homeroom_ Teacher v

Phone Numbers v

Address v

- In the Export Options window, in the Filters panel, determine the filters for the export and, to open a panel and add a filter, click .



Select All Criteria to export only records that match all of the criteria you specify.

Select Any Criteria to export records that match any of the criteria you specify.

- From the Category dropdown, select the appropriate category.
- In the first dropdown below Category, select the appropriate type of information.
- In the second dropdown, select an operator (e.g., equals, is less than, contains).
- In the third dropdown or field, select or enter a value. Click Add Criteria.
- Repeat steps 4 to 8 for each filter you want to define.
- In the Search Criteria panel, select All Criteria or Any Criteria.
- Schedule the export and select an output option. See “Scheduling a Custom Export and Selecting Output Options” on page 128.

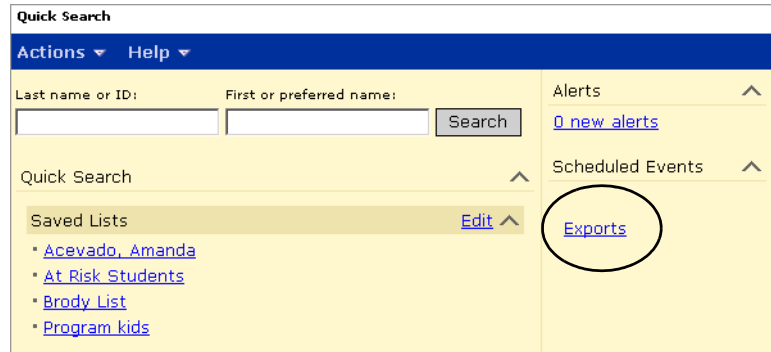
Scheduling a Custom Export and Selecting Output Options

You can specify when you want the export to occur. If you schedule an export to run immediately, the export results are generated and displayed in the specified output format. Available output formats are:

- Adobe Acrobat (*.pdf)
- Crystal Reports (*.rpt)
- Microsoft Excel (*.xls)
- Microsoft Word (*.doc)
- Rich Text (*.rtf)
- Comma-separated values (*.csv)
- Tab-delimited text (*.txt)
- Plain text (*.txt)

Once the export is complete, you can save the results from the open browser window.

If you schedule an export to run at a predefined time, a task for that export is inserted into the Chancery SMS Task Manager to be run at the appropriate time. When the export is complete, it can be retrieved through the Export link in the Scheduled Events panel on the Quick Search page.



TO SCHEDULE AN EXPORT AND SPECIFY OUTPUT OPTIONS:

- 1 In the control bar, under Admin, click Exports.
- 2 On the Exports page, click the name of the export you want to run.
- 3 Set your export filters. See “Setting Custom Export Filters” on page 127.
- 4 In the Export Options window, in the Scheduling Options panel, do one of the following:

To	Do this
Run the export immediately	<ul style="list-style-type: none"> • Select Run now.
Run the export once for a scheduled time	<ol style="list-style-type: none"> 1 Select One time. 2 In the Date field, enter the date the export is to be run. 3 In the “at” fields, select the time the export is to be run.
Run the export on a regular schedule	<ol style="list-style-type: none"> 1 Select Recurring. 2 In the Starting on field, enter the date the recurring schedule is to start. 3 In the “at” fields, select the time the export is to be run. 4 In the Every field, select the value and unit for the recurring schedule (e.g., 1 hour).

- 5 In the Output Options panel, select an export format.
- 6 Click Run Export.

Managing Custom Exports

Completed exports can be viewed and deleted using the Export Management page.

- 1 On the Quick Search page, in the Scheduled Events panel, click Exports.
- 2 On the Export Management page, do any of the following:

To	Do this
Delete a scheduled export	<ol style="list-style-type: none"> 1 Select the export. 2 From the Actions menu, click Delete Scheduled Export. 3 Click OK to confirm.
Download an export	<ol style="list-style-type: none"> 1 Select the export. From the Actions menu, click Download Export. OR Click the export name. 2 In the File Download dialog, click Save. 3 In the Save As dialog, navigate to the folder where you want to save the file, and then click Save. 4 If the Download Complete dialog appears, wait until it says “Download Complete”, and then click Close.

Exporting Data Using Built-in Export Templates

Built-in templates are available for exporting data into HealthOffice and SETS.

Exporting Data to HealthOffice\SETS

Exports to both HealthOffice and SETS are performed the same way, using scheduled jobs. The job can occur once – immediately or at a later time – or the job can occur repeatedly.

You can create multiple export jobs where each job has its own name and timing. Multiple jobs can use the same template, but they must export to a file with a unique file name. All exports are placed in the following location on the Chancery SMS web server: `C://csl/opendistrictclient/ascii/exportfiles`.

Note

Exports for SETS/HealthOffice are scheduled as “db server” tasks. That means if you changed the Task Manager settings for your servers so database server tasks are run on other servers, the location of the exports will change accordingly.

For each job, you choose the scope of the export – either all students or only the ones who enrolled in the last 30 days. This enables you to do a comprehensive export at the beginning of the year or whenever you want to update all students, as well as smaller exports that cover only new students.

For further details on what information is exported to SETS or HealthOffice, refer to “SETS Export Data” on page 132 and “HealthOffice Export Data” on page 135.

TO EXPORT DATA TO HEALTHOFFICE/SETS:

- 1 In the control bar, under Admin, click District Setup.
- 2 On the District Setup page, under Tools, click Schedule HealthOffice/SETS Export.
- 3 On the Schedule Export page, do one of the following:

To	Do this
Create a scheduled export	<ul style="list-style-type: none"> • From the Actions menu, click Add Scheduled Export.
Change a scheduled export	<ul style="list-style-type: none"> • Click the name of the export job. <p>Note You cannot edit completed jobs.</p>
Delete a scheduled export	<ol style="list-style-type: none"> 1 Select the checkbox next to the export job. 2 From the Actions menu, click Delete Scheduled Export. 3 Skip the remaining steps.

- 4 On the Add/Edit Schedule Export page, under General, identify the export as follows:

Field	Description
Job name	Enter a unique name for the export.
File name	Enter the name of the file you are exporting, including the name and extension but not the path. For example, enter “HealthOffice.txt”.
Export template	Select the template for the export: <ul style="list-style-type: none"> • SETS (Special Education Tracking System) from 4GL OR HealthOffice from Health Master
Export criteria	Select one of the following: <ul style="list-style-type: none"> • To export data for all active students, click All Students • To export data for active students enrolled within the last 30 days, click Recently Enrolled Students

General

*Job name:

*File name:

*Export template:

*Export criteria:

5 Under Schedule, indicate the timing of the export:

To	Do this
Export the file immediately	<ul style="list-style-type: none"> Select Run now.
Export the file once at a specified time	<ul style="list-style-type: none"> Select One time, and then specify the date and time.
Export the file repeatedly	<ul style="list-style-type: none"> Select Recurring, and then specify the interval and when the exports begin.

6 Click OK.

7 Navigate to the following folder on the Chancery SMS server to find the export file: C://csl/opendistrictclient/ascii/exportfiles.

SETS Export Data

The following data is exported to SETS:

4GL Field	Description	Chancery SMS Schema.Property Table.Field
Student Demographic Data		
Student Ident	The student's internal ID.	DistrictStudent.DistrictStudentID <i>CSL_STD_DEMO_DISTRICT.ID_STD_DEMO_DISTRICT</i>
Last Name	The student's last name.	DistrictStudent.Last Name <i>CSL_STD_DEMO_DISTRICT.LAST_NAME</i>
First Name	The student's first name.	DistrictStudent.FirstName <i>CSL_STD_DEMO_DISTRICT.FIRST_NAME</i>
DOB	The student's date of birth.	DistrictStudent.BirthDate <i>CSL_STD_DEMO_DISTRICT.BIRTH_DATE</i>

4GL Field	Description	Chancery SMS Schema.Property <i>Table.Field</i>
Current Attending School	The student's home school.	SchoolName.SchoolNameID <i>CSL_SET_SCHOOL_NAME.ID_SET_SCHOOL_NAME</i> Note For Tennessee, this maps to the student's school of enrollment, if "Instr Services Period of Service" is set to "Primary School assigned for the student".
Current Grade Level	The student's current grade.	Grade.Code <i>CSL_SET_GRADE.GRADE_CODE</i>
Ethnic Code	The student's ethnic category.	EthnicCategory.Code <i>CSL_SET_ETHNIC_CATEGORY.ETHNIC_CATEGORY_CODE</i>
Gender	The student's gender, either Male or Female.	DistrictStudent.Gender <i>CSL_STD_DEMO_DISTRICT.GENDER</i>
Middle Name/Initial	The student's middle name or middle initial.	DistrictStudent.MiddleName <i>CSL_STD_DEMO_DISTRICT.MIDDLE_NAME</i>
Suffix	The generation of the same name (e.g., John Smith III).	DistrictStudent.Generation <i>CSL_STD_DEMO_DISTRICT.LINEAGE</i>
SSN	The student's Social Security Number.	DistrictStudent.SSN <i>CSL_STD_DEMO_DISTRICT.SOCIAL_SECURITY_NUMBER</i>
Current School of Residence	The school where the student resides.	Not supported.
Home Language	The language spoken in the student's home.	Language.Code <i>CSL_SET_LANGUAGE.LANGUAGE_CODE</i>
Next School	The student's projected school.	School.SchoolID <i>CSL_VW_SCHOOL_INFO.ID_VW_SCHOOL_INFO</i>
Residence Address	Address lines 1 and 2 of the student's physical address.	Address.AddressLine1 and AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1 and ADDRESS_LINE_2</i>
Residence City	The city indicated in the student's physical address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
Residence State	The state indicated in the student's physical address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Residence Zip Code	The zip code indicated in the student's physical address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Mailing Address	Address lines 1 and 2 of the student's mailing address.	Address.AddressLine1 and AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1 and ADDRESS_LINE_2</i>

4GL Field	Description	Chancery SMS Schema.Property Table.Field
Mailing City	The city indicated in the student's mailing address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
Mailing State	The state indicated in the student's mailing address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Mailing Zip Code	The zip code indicated in the student's mailing address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Status	The student's active status.	Not supported.
Graduation Date	The student's date of graduation.	Not supported.
Home Phone	The student's phone number.	StudentPhone.BasicNumber <i>CSL_STD_PHONE_NUMBER.BASIC_NUMBER</i>
Contact Data		
Student Ident	The student's internal ID.	DistrictStudent.DistrictStudentID <i>CSL_STD_DEMO_DISTRICT.ID_STD_DEMO_DISTRICT</i>
Relationship	The relationship of the contact to the student.	Relationship.Description <i>CSL_SET_RELATION.RELATION_DESC</i>
First Name	The contact's first name.	StudentContactOrdered.FirstName <i>CSL_VW_STUDENT_CONTACT.FIRST_NAME</i>
Last Name	The contact's last name.	StudentContactOrdered.LastName <i>CSL_VW_STUDENT_CONTACT.LAST_NAME</i>
Address	Address lines 1 and 2 of the contact's address.	Address.AddressLine1 and AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1 and ADDRESS_LINE_2</i>
City	The city indicated in the contact's address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
State	The state indicated in the contact's address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Zip Code	The zip code indicated in the contact's address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Phone Number (Home)	The contact's home phone number.	ContactPhone.BasicNumber <i>CSL_CNT_PHONE_NUMBER.BASIC_NUMBER</i>
Alternate Phone	An alternate phone number for the contact.	Not supported.
Alternate Phone Extension	The extension of the alternate phone number.	Not supported.
Phone Number (Work)	The contact's work phone number.	ContactPhone.BasicNumber <i>CSL_CNT_PHONE_NUMBER.BASIC_NUMBER</i>

4GL Field	Description	Chancery SMS Schema.Property Table.Field
Work Phone Extension	The extension of the work phone number.	ContactPhone.Extension <i>CSL_CNT_PHONE_NUMBER. EXTENSION</i>
Student resides with	Whether the student lives with the contact.	StudentContactOrder.LivesWith <i>CSL_VW_STUDENT_CONTACT. STUDENT_LIVES_WITH_CONTACT</i>
Email	The contact's email address.	StudentContactOrdered.EmailAddress <i>CSL_VW_STUDENT_CONTACT. EMAIL_ADDRESS</i>
4GL Status Info Data		
Student Ident	The student's internal ID.	DistrictStudent.DistrictStudentID <i>CSL_STD_DEMO_DISTRICT.</i>
School	The school to which the status record applies.	SchoolName.SchoolNameID <i>CSL_SET_SCHOOL_NAME. ID_SET_SCHOOL_NAME</i>
Effective Date	The effective date for the status record.	StudentStatus.StartDate <i>CSL_STD_STATUS.STATUS_CODE_DATE</i>
Enrollment Code	The entry or return status code.	Status.Code <i>CSL_SET_STATUS.STATUS_CODE</i>
Withdrawal Code	The withdrawal status code.	Status.Code <i>CSL_SET_STATUS.STATUS_CODE</i>

HealthOffice Export Data

The following data is exported to HealthOffice:

HealthOffice Field	Description	Chancery SMS Schema.Property Table.Field
Student Demographic Data		
Birth Date	The student's date of birth.	DistrictStudent.BirthDate <i>CSL_STD_DEMO_DISTRICT. BIRTH_DATE</i>
Gender	The student's gender, either Male or Female.	DistrictStudent.Gender <i>CSL_STD_DEMO_DISTRICT.GENDER</i>
First Name	The student's first name.	DistrictStudent.FirstName <i>CSL_STD_DEMO_DISTRICT. FIRST_NAME</i>
Last Name	The student's last name.	DistrictStudent.Last Name <i>CSL_STD_DEMO_DISTRICT.LAST_NAME</i>
Middle Name	The student's middle name.	DistrictStudent.MiddleName <i>CSL_STD_DEMO_DISTRICT. MIDDLE_NAME</i>

HealthOffice Field	Description	Chancery SMS Schema.Property Table.Field
Grade	The student's current grade.	Grade.Code <i>CSL_SET_GRADE.GRADE_CODE</i>
Address Line 1	Address line 1 of the student's mailing address.	Address.AddressLine1 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1</i>
Address Line 2	Address line 2 of the student's mailing address.	Address.AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_2</i>
City	The city indicated in the student's mailing address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
State	The state indicated in the student's mailing address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Zip Code	The zip code indicated in the student's mailing address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Country	The country indicated in the student's mailing address.	Country.Code <i>CSL_SET_COUNTRY.COUNTRY_CODE</i>
Social Security Number	The student's Social Security Number.	DistrictStudent.SSN <i>CSL_STD_DEMO_DISTRICT. SOCIAL_SECURITY_NUMBER</i>
ID Number	The student's ID number.	DistrictStudent.Number <i>CSL_STD_DEMO_DISTRICT.NUMBER</i>
Alert	Any medical alert message for the student.	DistrictStudent.MedicalAlert <i>CSL_STD_DEMO_DISTRICT. MEDICAL_ALERT</i>
Phone Number	The student's phone number.	StudentPhone.BasicNumber <i>CSL_STD_PHONE_NUMBER. BASIC_NUMBER</i>
Room	The student's homeroom.	HomeRoom.Room <i>CSL_SMS_HOMEROOM.ROOM_NUMBER</i>
E-mail Home	The student's email address.	DistrictStudent.EmailAddress. <i>CSL_STD_DEMO_DISTRICT. EMAIL_ADDRESS</i>
School ID	The license number of the student's home school.	School.LicenseNumber <i>CSL_VW_SCHOOL_INFO. CSL_LICENSE_NUMBER</i>
Doctor Contact Information		
Full Name	The doctor's full name.	DistrictStudent.DoctorName <i>CSL_STD_DEMO_DISTRICT. DOCTOR_NAME</i>
Social Security Number	The doctor's Social Security Number.	Not supported.
Address Line 1	Address line 1 of the doctor's address.	Address.AddressLine1 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1</i>

HealthOffice Field	Description	Chancery SMS Schema.Property Table.Field
Address Line 2	Address line 2 of the doctor's address.	Address.AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_2</i>
City	The city indicated in the doctor's address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
State	The state indicated in the doctor's address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Zip Code	The zip code indicated in the doctor's address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Phone Number (Home)	The doctor's home phone number.	Not supported.
Phone Number (Work)	The doctor's work phone number.	DoctorPhone.BasicNumber <i>CSL_STD_DOCTOR_PHONE.BASIC_NUMBER</i>
Email	The doctor's email address.	Not supported.
Student Contact Information		
First Name	The contact's first name.	StudentContactOrdered.FirstName <i>CSL_VW_STUDENT_CONTACT.FIRST_NAME</i>
Last Name	The contact's last name.	StudentContactOrdered.LastName <i>CSL_VW_STUDENT_CONTACT.LAST_NAME</i>
Social Security Number	The contact's Social Security Number.	Not supported.
Address Line 1	Address line 1 of the contact's address.	Address.AddressLine1 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_1</i>
Address Line 2	Address line 2 of the contact's address.	Address.AddressLine2 <i>CSL_DIS_ADDRESS.ADDRESS_LINE_2</i>
City	The city indicated in the contact's address.	City.Code <i>CSL_SET_CITY.CITY_CODE</i>
State	The state indicated in the contact's address.	State.Code <i>CSL_SET_STATE.STATE_CODE</i>
Zip Code	The zip code indicated in the contact's address.	Address.ZipCode <i>CSL_DIS_ADDRESS.ZIP_CODE</i>
Phone Number (Home)	The contact's home phone number.	ContactPhone.BasicNumber <i>CSL_CNT_PHONE_NUMBER.BASIC_NUMBER</i>
Phone Number (Work)	The contact's work phone number.	ContactPhone.BasicNumber <i>CSL_CNT_PHONE_NUMBER.BASIC_NUMBER</i>

HealthOffice Field	Description	Chancery SMS Schema.Property <i>Table.Field</i>
Email	The contact's email address.	StudentContactOrdered.EmailAddress <i>CSL_VW_STUDENT_CONTACT. EMAIL_ADDRESS</i>

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