Sending Obligations to the next School

1. Files that another school sends to you MUST look <u>exactly</u> like this.

   It must have the exact same set of columns, same set of column names and the columns have to be in this order!

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Mark	MSTUBIO::GR	ID	LAST	FIRST	MI	GR	Status	IAF_NO	Date	Department	Item	Description	Balance	TeachName	CourseName	Item_ID_Number	SCHNO
2			123456	Harman	Bill	J	08	Transferred - Nxt Sch	9000.0000	04/03/2019	Art	Art 6 Course Fi	Art 6 Course Fi	$10.00	Redwood MS	Art-GR 06		999

PreviousSchoolData

Here is a sectioned, large view of the fields, their names and the required order.

	A	B	C	D	E	F	G
1	Mark	MSTUBIO::GR	ID	LAST	FIRST	MI	GR
2			123456	Harman	Bill	J	08

PreviousSchoolData

H	I	J	K	L
Status	IAF_NO	Date	Department	Item
Transferred - Nxt Sch	9000.0000	04/03/2019	Art	Art 6 Course Fi

M	N	O	P	Q	R
Description	Balance	TeachName	CourseName	Item_ID_Number	SCHNO
Art 6 Course Fi	$10.00	Redwood MS	Art-GR 06		999

2. The Excel worksheet must be named like this.

   PreviousSchoolData

   earch
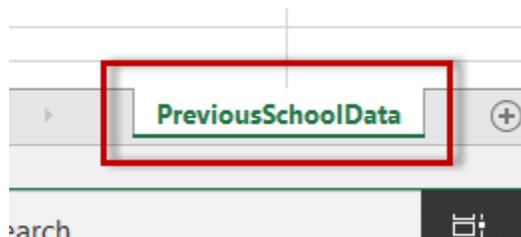
3. Before importing the File, it has to be renamed by the Receiving School exactly like this and then placed in the FA's My Docs folder.

   PreviousSchoolData.xlsx

Sending Obligations to the next School

Nothing else works – unless you are a FileMaker pro.

Sending schools [mostly middle schools] have to use this screen to create the correct file to send to the next school.
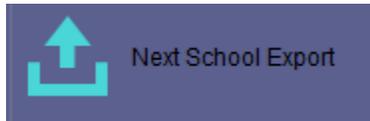
Nothing else works – unless you are a FileMaker pro.

On the next pages are the instructions from the SOS User Guide.

Pages 3 and 4 below explain the process – how it works – so you can better understand the entire process.

Pages 5 and 6 lists the exporting process steps used by the SENDING school.

Pages 7 and 8 lists the importing process steps used by the RECEIVING school.

Sending Obligations to the next School

SOS Data Exchange Features

The principal feature new to the SOS applications [since version # 80] is the ability to more easily move data between schools in a standard way using Excel.

Essentially, one school exports out a set of selected student records into an Excel file in a standard format (a set of columns arranged in a specific order), sends it to the next school. The receiving school then import the data into its SOS application as obligations that can be uploaded to the OSP site.

The receiving school can import the data into that school's SOS application with relative ease because the data has a standard set of elements and standard structure. This process is supported at both the sending and receiving schools by screens and functions built into the SOS applications.

Item 1: Note that the student's current grade level will be imported into the receiving schools SOS

Item 2: Alternately the grade level the student was in at time of obligation could be used, rather than the current grade.

Item 3: The value in the "TeachName" field will go into the receiving school's "TeacherName" field and that data will be the sending school's name.

Item 4: the address information is not sent along because if the student is in the receiving school, then that that information will be in that school's SIMS data and can be brought in using a "look-up" procedure.

Import Field Mapping

Source: PreviousSchoolData.xlsx   Target: Current Table ("PreStage")

Source Fields	Target Fields
Mark ➡	Mark
MSTUBIO::GR ➡	GR
ID ➡	ID
LAST ➡	LAST
FIRST ➡	FIRST
MI ➡	MI
GR —	PHONE
Status ➡	Status
IAF_NO ➡	IAF_NO
Date ➡	OrigDate
Department ➡	Department
Item ➡	Item
Description ➡	Description
Balance ➡	Amount
TeachName ➡	TeacherName
CourseName ➡	CourseName
Item_ID_Number ➡	Item_No
SCHNO ➡	SCHNO
—	SchName
—	Street_Add
—	Creator
—	City_Add
—	RCount

Sending Obligations to the next School

Compare and contrast this image with the one on the previous page.
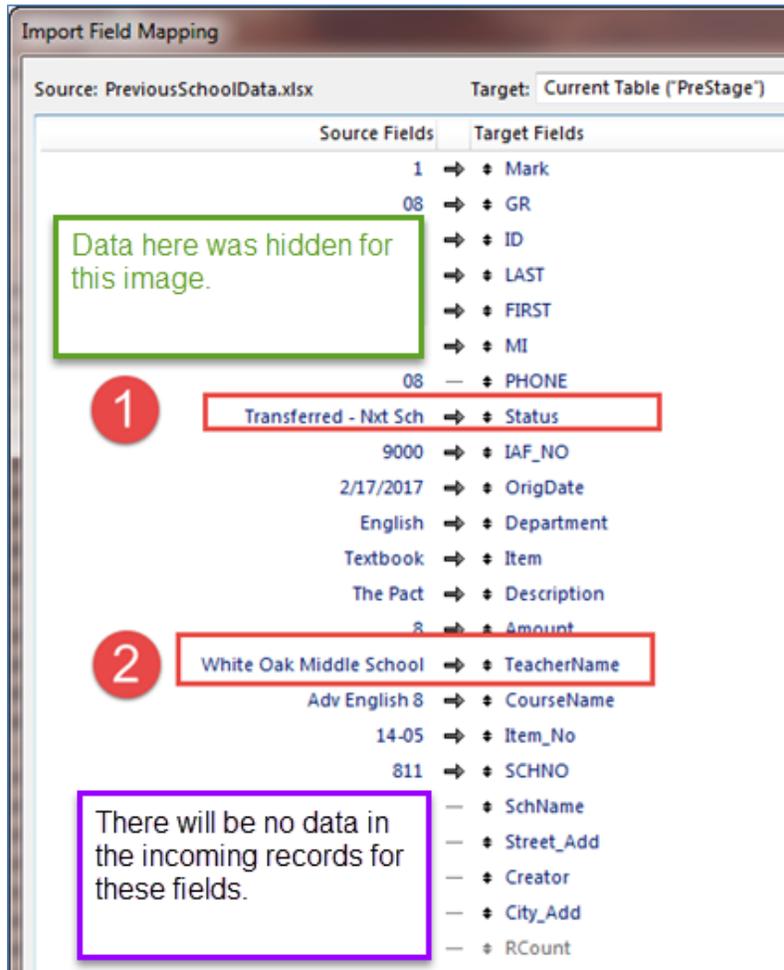
When student records are exported out of the sending school's SOS they are first imprinted so that their *STATUS* is set to "Transferred – Nxt Sch", *IAF_NO* is set to "9000.0000" and the *TeachName* field is set with the sending school's name.

When the data is imported in by the receiving school, the *STATUS* field information is changed to "Outstanding" so the OSP export process will pick up the records and include them in the next OSP extract.

Status	Department			Amount	CourseName	TeacherName	Price
Outstanding	English	Textl		$8.00	Adv English 8	White Oak Middle	$8.00
Outstanding	English	Te		$8.00	Adv English 8	White Oak Middle	$8.00
Outstanding	English	Textb		$6.00	Adv English 8	White Oak Middle	$6.00
Outstanding	English	Te		$10.00	Adv English 8	White Oak Middle	$10.00
Outstanding	English	Text		$8.00	Adv English 8	White Oak Middle	$8.00

It is imperative that the data be transferred from school to school in this way only!

Sending Obligations to the next School

Exporting Procedure (sending school):

1. Navigate to the "Next School Export" screen On the FA's screen go to the "Reporting Menu" tab and click on the "Next School Export" icon.

2. This will take you to the screen pictured below.

3. Search to find the set of records to be sent to the next school.
4. Mark them with an "X" so they can be "found" as a set for the next steps.
5. Sort the data by student ID to place multiple records for each student together.
6. Examine the records and if satisfied then and then Click on the "Set Nxt. School" icon.
7. Examine the records and if satisfied then click on the "**Nxt Sch to Excel**" icon.

8. An Excel file will be created that will land in the user's "My Documents" folder, auto open so it can be examined. The file will be named using the school number; like this.

Sending Obligations to the next School

In your SOS, your data will now look like this:

9. Send the file to the next school.

It is imperative that the data be transferred from school to school in this way only!

Do not send pieces of paper as a way of sending your student debt to another school.

Only by sending the student debt to the next school in this way [so the records get the status set to "Transferred Nxt - Sch"] and then doing a new upload to OSP will the receiving school be able to upload your student debt and use the online system to collect that money.

If a student's records on OSP are still set as belonging to your school and the new school also uploads those records as "Outstanding", then they will NOT show up for the parent to see and pay!

Student Obligation "records" cannot be "Outstanding" and collectable by two schools!

Sending Obligations to the next School

Importing Procedure (receiving school):

As the receiving school you may receive several Excel files from multiple schools at about the same time. This is why the sending school's number is added as a prefix in the Excel file's name.

   Example: "811PreviousSchoolData.xlsx"

It is hoped that this will help reduce some confusion during those busy periods.
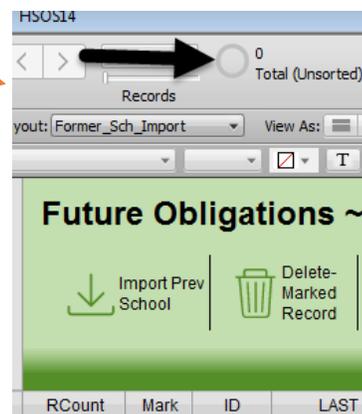
Importing Steps:

1. Remove the school number prefix from the Excel file's name so its name is simply "PreviousSchoolData.xlsx" and then place the renamed file in your "My Documents" folder.

2. Open your SOS and while on the FA's screen, go to the "Reporting Menu" tab.

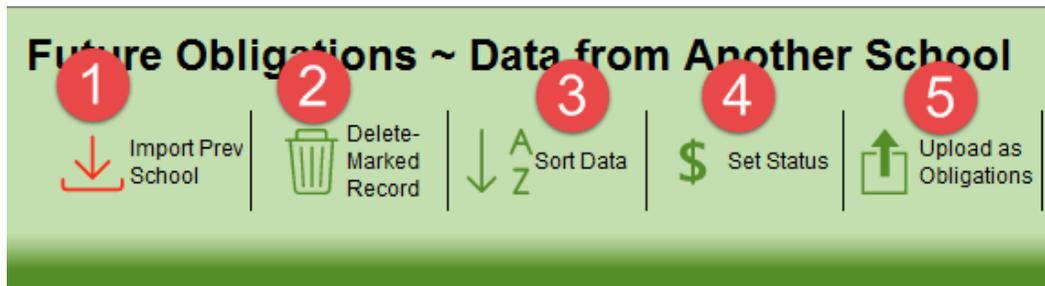3. From that menu select "Former Sch Import".
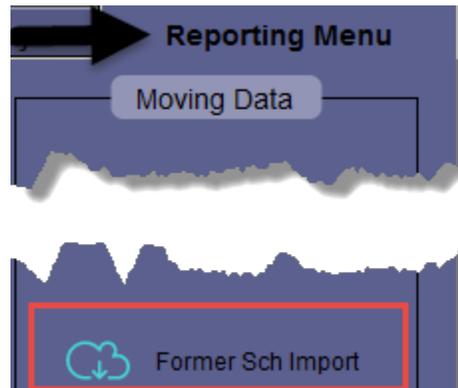
4. This will take you to this screen.

5. When you arrive the table will be empty.

Sending Obligations to the next School

6. There are five steps on this screen.

7. The **first** step is to import in the Excel file data.

8. The **next** step is to look at the imported data determine if any records should be "marked" and deleted before proceeding with the remainder of the steps.

9. Step **three** can be used to place the records in student ID groups before proceeding.

10. Step **four** changes the "*Status*" designation from "Transferred - Nxt Sch" to "Outstanding". This is necessary so the Export to OSP process will pick up these records as students who owe money.

11. The final step is to "Upload" the data into the Obligations table as Obligation records. When this button is clicked, then multiple things happen.

    [a.] The records are imported into the Obligations table where appropriate (unique and sequentially correct) record numbers are created and other auto-enter functions happen just as they do when records are created individually by users.

    [b.] As a final step, the newly imported records are deleted from the "Pre-Stage" table so another set of records can be worked with, without the fear that one may twice import in a set of data.

12. A best practice here would be to rename the Excel file just used so the sending school's number is added to the end of the file name, like so:

    "PreviousSchoolData_811.xlsx"

    In this way the file can be saved for future reference and the renaming signifies that the data has already been imported into the school's SOS.