

ClassMate *for* Adult Education

Data Export Wizard



Data Export Wizard:

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The Data Export Wizard provides administrators and data managers the ability to easily export data from the ClassMate Adult Education database. The Data export Wizard allows users to quickly select required data fields in any combination to meet their specific reporting needs. The data is exported into an excel file (s) that can be used to create charts, graphs, or other analytical reports.

What we'll Learn.....

Student Analytics Export: Student Selection Criteria

- Single Student
 - Local ID
 - State ID
- All Students
- Last Name
- Status
- Range of Students
 - Enrollment Date
 - Enrollment Date Range
- Item Export Fields
- Multi-Exports
 - Status
 - Date Range
- File Configurations
 - Column Headers

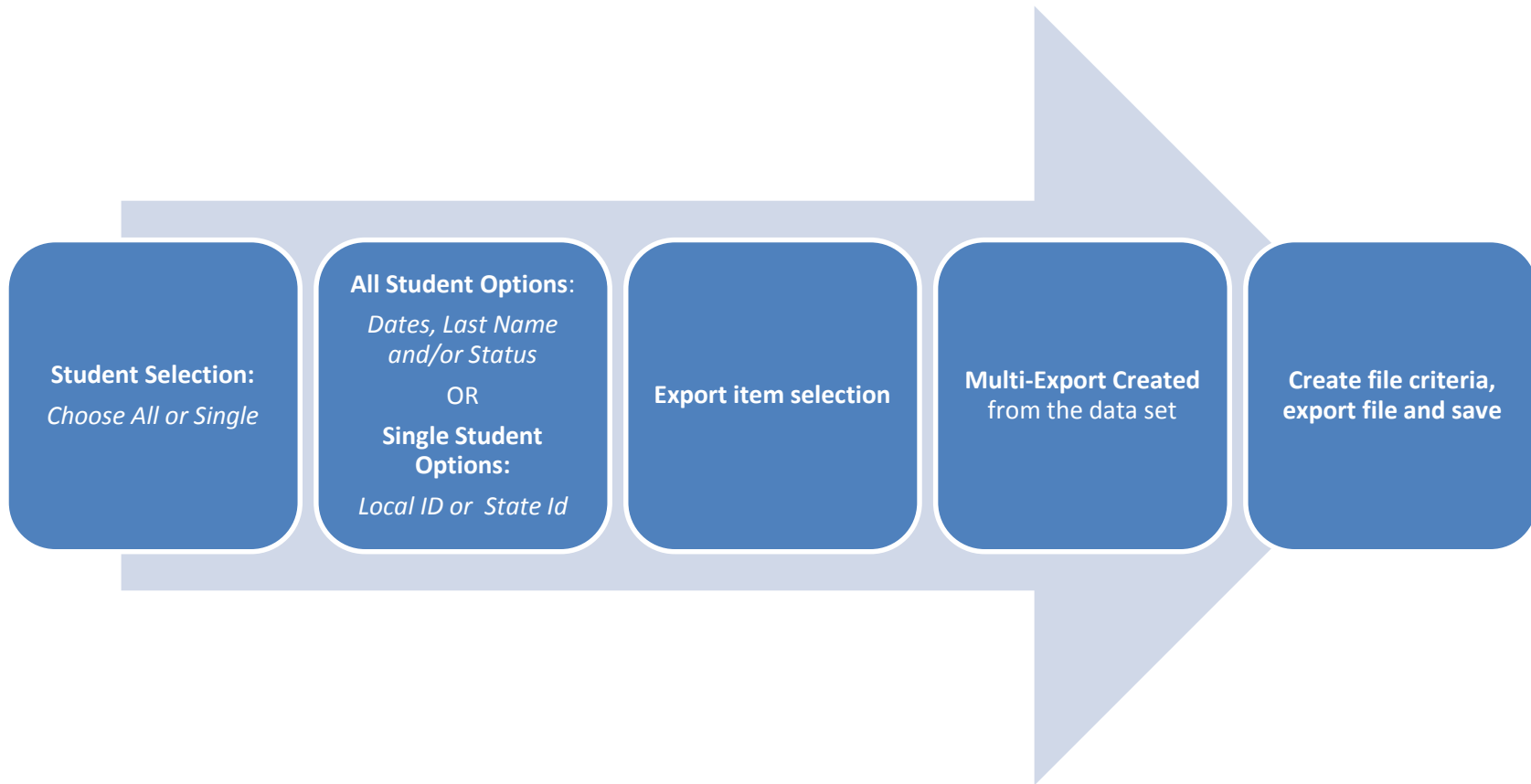
Module & Report Assignments

Administrative Modules

- Data Export Wizard



Data Export Wizard Process



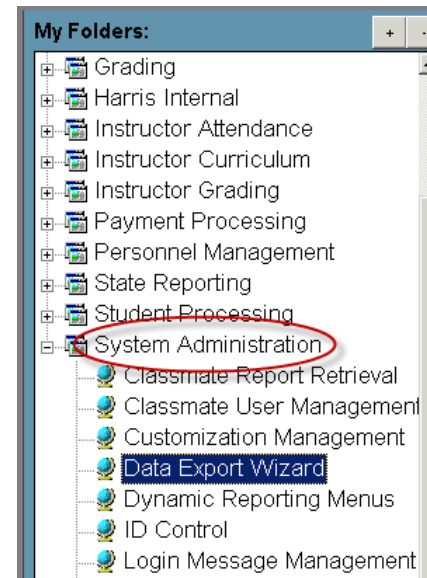
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The Data Export Wizard provides administrators and data managers the ability to easily export data from the ClassMate Adult Education database. The Data export Wizard allows users to quickly select required data fields in any combination to meet their specific reporting needs. The data is exported into an excel file (s) that can be used to create charts, graphs, or other analytical reports.

Getting Started

Double click > **Modules** > Double Click
System Administrator> Click **Data Export Wizard**



Data Export Wizard

Step 1: Student Selection

On the Student Analytics Exports Tab select either:

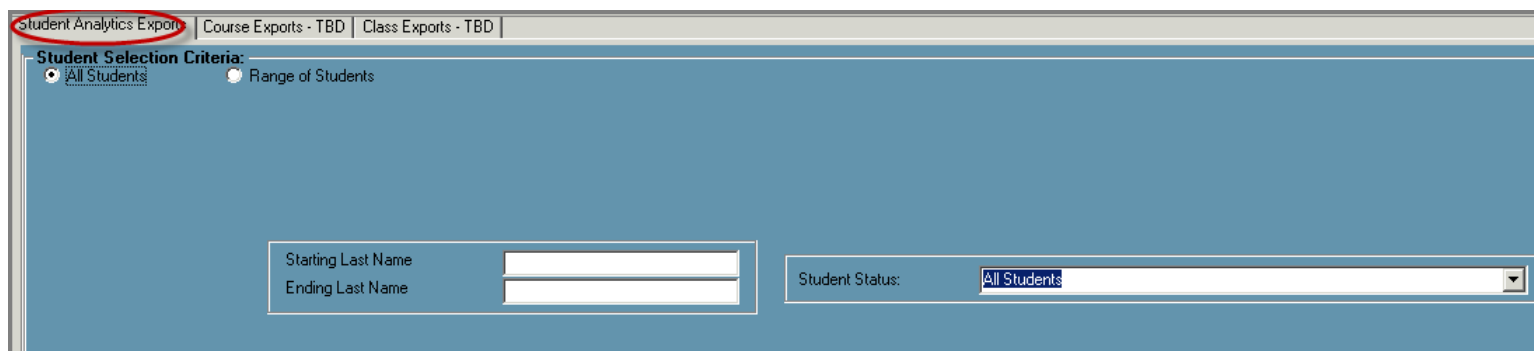
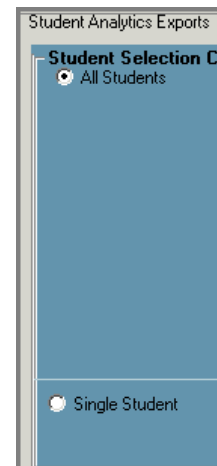
This is a **Mandatory** Step. You must select one.

- All Students ALL students in the database
- OR
- Single Student One specific Student

All students selections will allow for the following filters:

These are **Optional** filters

- Student Last Name (Start & End)
- Status (System will Default to All Students)



Helpful Hint: You can change the Student Status by using the drop down menu.



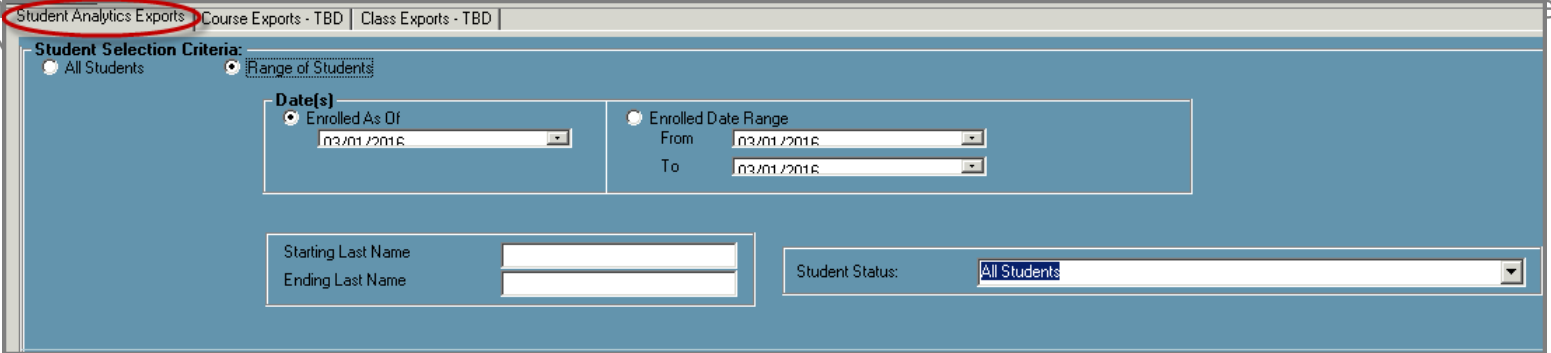
Data Export Wizard

Step 1: Student Selection

If “All Students” is the desired data set , additional options exist. Users can further choose a “Range of Students”. If a Range of Students is selected, a display with the following filters will pop up. You must select the desired date (system will default to the current date) This is a Mandatory selection for “Range of Students”

- **Enrolled as of** ALL students in the database with filters for Enrollment as of Date
- **Enrolled Date Range** ALL Student in the database with a From and To enrollment Date

The Data Export Wizard displays the Student Selection Criteria for the selected data set. The Student Selection Criteria is a mandatory selection for the Data Export Wizard.



Student Analytics Exports | Course Exports - TBD | Class Exports - TBD

Student Selection Criteria:

All Students Range of Students

Date(s)

Enrolled As Of Enrolled Date Range

Enrolled As Of: 03/01/2016

Enrolled Date Range: From: 03/01/2016 To: 03/01/2016

Starting Last Name:

Ending Last Name:

Student Status: All Students

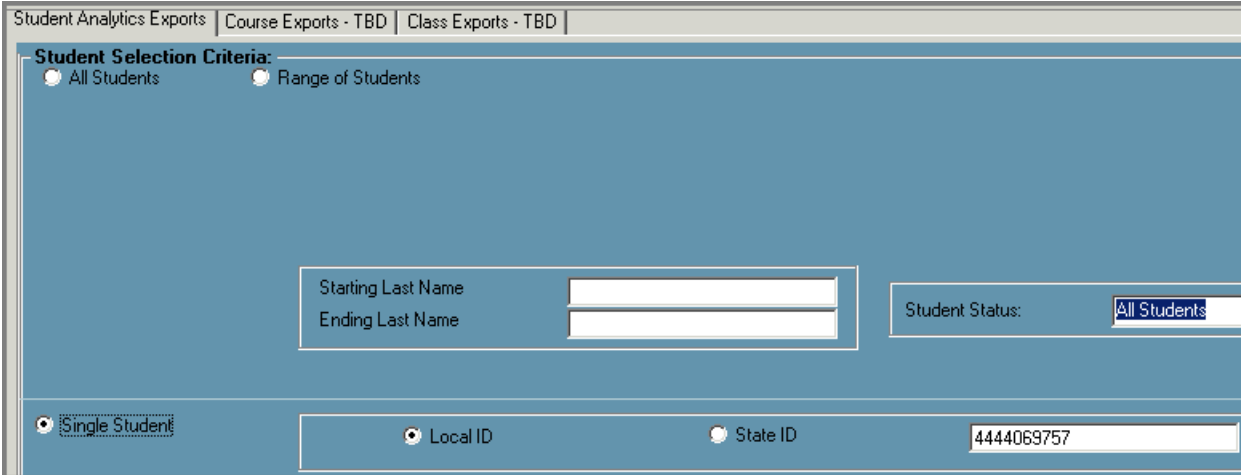
Helpful Hint: Enrolled is defined as any student within the selection criteria (date as of OR From/to with a status of enrolled, completed or withdrawn.

Data Export Wizard

Step 1: Student Selection

If “Single Students” is selected the following options display:

- Local ID ClassMate ID or Local IC
- State ID PA Secure, NYSIS, etc.



The screenshot shows the 'Student Selection Criteria' section of the Data Export Wizard. It features a tabbed interface with 'Student Analytics Exports', 'Course Exports - TBD', and 'Class Exports - TBD'. Under 'Student Selection Criteria', there are two radio buttons: 'All Students' (selected) and 'Range of Students'. Below this, there are input fields for 'Starting Last Name' and 'Ending Last Name', and a dropdown menu for 'Student Status' set to 'All Students'. At the bottom, there are radio buttons for 'Single Student' (selected), 'Local ID', and 'State ID'. A text input field next to 'State ID' contains the value '4444069757'.

Helpful Hint: You may only use local or state ID for single student search.




Data Export Wizard

Step 2: Items to Include in the export

- Select the items you would like to export and attach to the students. Items are selected by clicking in the box to the left of the item. Selected items will display with a **BLACK** check mark.
- To select **“ALL”** items click the Grey button with **GREEN** check mark.
- To remove **“ALL”** selections click the Grey button with **GREEN** check mark
- Selecting at least one item for export is a **Mandatory** Step.
- The items selected will be included in the export on one line attached to a single student record. The more items selected to include the more columns there will be.
- This file will be produced as a single export file.

Select Items to include in export:

<input type="checkbox"/> Student ID <input checked="" type="checkbox"/> State Secure ID <input type="checkbox"/> SSN <input checked="" type="checkbox"/> First Name <input type="checkbox"/> Initial <input checked="" type="checkbox"/> Last Name <input type="checkbox"/> Suffix <input type="checkbox"/> Maiden Name <input checked="" type="checkbox"/> Address <input checked="" type="checkbox"/> Phone Numbers <input checked="" type="checkbox"/> Email Address	<input checked="" type="checkbox"/> Gender <input checked="" type="checkbox"/> Birth Date <input type="checkbox"/> Hispanic Indicator <input type="checkbox"/> Ethnicity <input checked="" type="checkbox"/> <u>Student Status</u> <input type="checkbox"/> Residing District <input type="checkbox"/> FERPA <input type="checkbox"/> Primary Income <input type="checkbox"/> Secondary Income <input type="checkbox"/> Family Size	<input type="checkbox"/> Referral <input type="checkbox"/> Contact Hours <input type="checkbox"/> High School Graduation Year <input type="checkbox"/> Scantron ID <input type="checkbox"/> Degree Type <input type="checkbox"/> CM ASP Student <input type="checkbox"/> 1098T Eligible <input type="checkbox"/> Full-Time/Part-Time <input type="checkbox"/> Fully Funded <input type="checkbox"/> Original Enrollment Date
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Check/Uncheck All Fields

Helpful Hint: Users **MUST** select the student selection criteria **PRIOR** to the export items to include with the selected students.

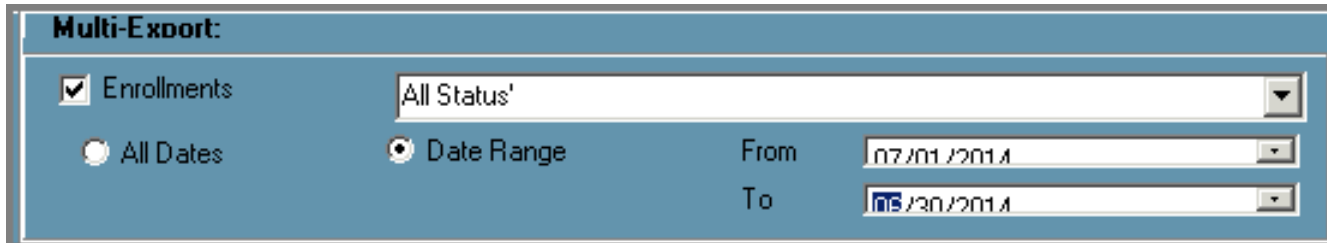


Data Export Wizard

Step 3: Multi-Export (Student Enrollments)

If users would like to create an additional export file with the enrollment information for the previously selected Student and item data set perform the following steps:

- **Enrollments:** Click the box to the left of the Enrollment option to select
 - **Status:** Select the type of Enrollment status desired. Remember this will be the enrollment status for the time period selected.
 - **All Dates:** Produce all enrollment data from the Student Date Range previously selected. (If Student Range was selected)
- OR**
- **Date Range:** Produces Enrollment data using the From and to dates drop down window, pulling only from the data set previously selected. (If Student Range was selected)



The screenshot shows a 'Multi-Export' dialog box with a blue header. It contains the following elements:

- A checked checkbox for 'Enrollments'.
- A dropdown menu for 'Status' with 'All Status' selected.
- An unchecked checkbox for 'All Dates'.
- A radio button selected for 'Date Range'.
- A 'From' date field with '07/01/2014' selected.
- A 'To' date field with '08/30/2014' selected.

Helpful Hint: The Enrollment data can **ONLY** be used in conjunction with the student and item export selection. Multi-Export functionality is a subset of the student and items criteria selections.

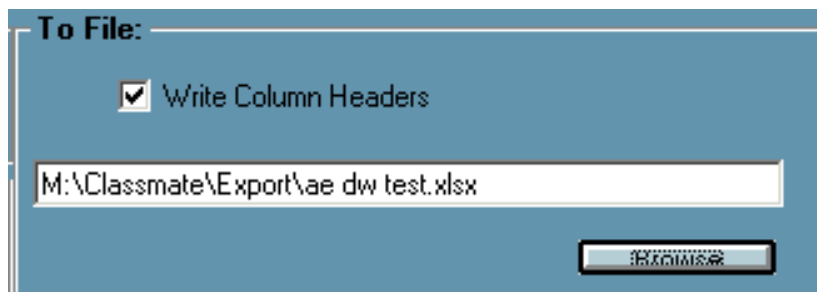


Data Export Wizard

Step 4 :Creating Export File Criteria

Prior to exporting the file (s) users MUST create a file path. The file path is where the export file(s) will be save along with a name.

- **Write Column Headers:** Selecting this option will place the selected item name at the top of each column to better identify the data set. It is a best practice to select this option to better understand the data set produced.
- **Browse:** Select the BLUE Browse button to navigate to the directory and folder the file(s) should be placed. Create a file name. The selected pathway and name will display in the field.



Helpful Hint: The Enrollment data can **ONLY** be used in conjunction with the student and item export selection. Multi-Export functionality is a subset of the student and items criteria selections.



Data Export Wizard

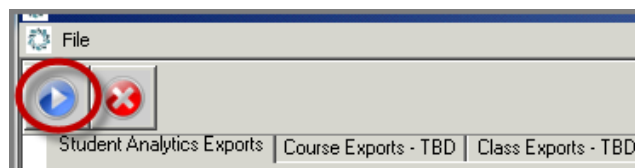
Step 5 :Creating the Export File

After all student, item and file criteria have been selected, users can then created the export file(s).

- User only exporting Student and item data sets will have a single excel file created.
- Users exporting both student/item and Enrollment (Multi-Export) will have two excel files created. The additional file will have ENROLLMENTS added to the end of the file name.

To Create the export perform the following steps:

- Select the **BLUE** Arrow Icon located on the left along the top of the screen (beneath the word File). The system will process the request and the export progress bar will continue until the export is complete. You will be notified when the export it complete.



Helpful Hint: If you do not select at least 1 item to export the system will indicate you **MUST** do so.



Data Export Wizard

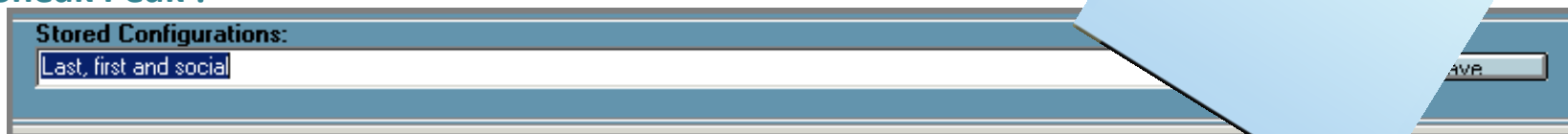
Step 6 :Opening the Export File

Browse to the Directory and folder location the file(s) were saved.
You will see the files named as created with the following extensions:

- Name user defined .xlsx
- Name user defined _ENROLLMENTS.xlsx

The files can be used to create graphs, merge with other data sources and used assist with data analytics.

Sneak Peak !



Users will soon have the ability to saved commonly used queries for quick use. The Stored configurations Functionality is currently under construction and will be available for you use in the near future.

Helpful Hint: Create folders and file names that are easily identifiable. Nothing is worse that not being to find your latest export file!

