

Time	Saratoga 1	Saratoga 2	Saratoga 3	Alabama	Travers	Broadway 1	Broadway 2	Broadway 3	Broadway 4
7:30am -8:30am	BREAKFAST								
8:00am-9:00am	Opening Remarks								
9:00am-9:30am	V	YOU ARE HERE	s						
9:30am-10:20am	SchoolToo		gistration	RIC Lead Session *By invite only	MOOV: A Paradigm Shift in Attendance & School Safety	Advanced Analytics: Future of AA	SchoolTool: Attendance Refactor	MTSS Edge: Documenting RTI Meetings	ClearTrack: Demo (101)
10:30am-11:20am	SchoolTool: Custom Exports			Advanced Analytics: RIC Staff: Regional Successes	Ed Vistas: Breaking Language Barriers: Delivering Student Reports to Every Family	SchoolTool: Parent Experience	SchoolTool: Data Integrations	MTSS Edge: Supporting Your Staff	ClearTrack: New Features
11:30am-12:30pm	LUNCH								
12:40pm-1:30pm	Room Transition		MTSS Edge: New Features	SchoolTool: BOCES	Mindex: Ed-Fi *By invite only	SchoolTool: Quality of Life	Advanced Analytics: Organizing Your Data for Authoring	MTSS Edge: Demo (101)	ClearTrack: Word Letters 101
1:40pm-2:30pm	SchoolTool: Security Tips & Tricks		SchoolTool: Standards-Based Grading	Advanced Analytics: Bringing Data into AA	AWS: AWS QuickSuite & Mindex AA: Secure, AI Powered Analytics for Education	Advanced Analytics: 101	SchoolTool: Leveraging SchoolTool for Summer Program Management	MTSS Edge: Class List Maintenance	ClearTrack: Spring/Summer Maintenance
2:40pm-3:30pm	SchoolTool: CCCR/NY Inspires			SchoolTool: Service Delivery Office Hours	ClassLink: Bridging System to Drive Impact: SchoolTool, ClassLink, & the power of APIs	Advanced Analytics: Gen BI & Author Session	Advanced Analytics: Newest Dashboards	MTSS Edge: Leveraging the Review Universal Scores Screen	ClearTrack: Data Warehouse Reporting



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Advanced Custom Exports

Jeremy Ryan
Scott Kesselring

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Direct Links to Resources in our Knowledge Base

Custom Export Basics

This is a recording of a webinar that was designed for users who aren't currently familiar with Custom Exports.

It's a great introduction to show users how to access the area, walkthrough the basics with each tab, and discuss how to make their Custom Exports!

Advanced Custom Exports

This webinar recording covers the advanced features and functionality available the **Maintenance > Export > Custom Export** are of SchoolTool.

The options specifically focused on are the use of filters and formulas, as well as scheduling exports.

Custom Export: Custom Program Service Fields

This links directly to some scripts that we have available on our Knowledge Base.

The purpose of these scripts are to create a new view and custom Custom Export fields for showing if a student has a current program service record.

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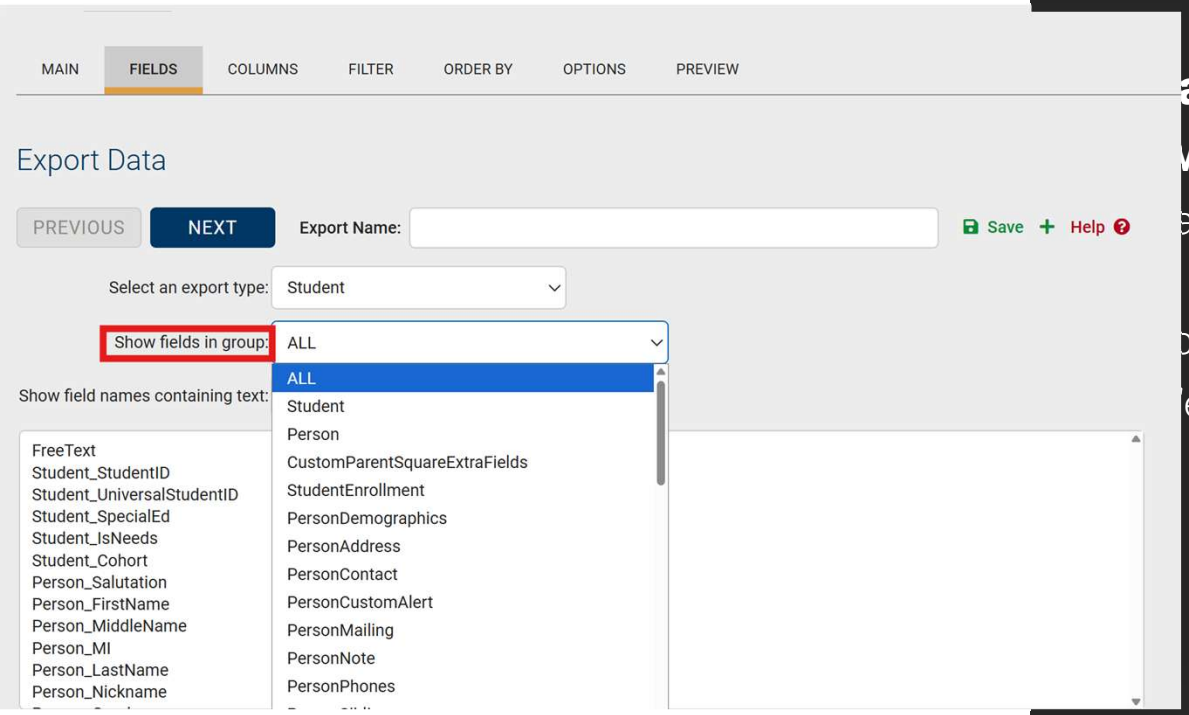
WHAT WE'LL COVER

- **General Custom Export Info**
- **Formulas and How to use them**
- **Commonly Requested Custom Exports**
- **Common Export Errors**
- **Q&A**

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General Custom Export Info



at is a custom export?

Maintenance > Export > Custom Export

ata driven row based information

Based on SQL views

ccess Based on User Group

e added a filters!

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Formulas and How to use them

- **Text Modification**
- **Conversions**
- **Dates**
- **Math**
- **Case When**



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Formulas and How to use them

Text Modification

- Left (value, X)
  - X= Starting Character
- Right (value, X)
  - X= Starting Character
- Substring (value , X, Y)
  - X= Starting Character
  - Y= Ending Character
- Lower (value)
- Upper (value)
- Datalength (value)

Text Modification Continued

- LTRIM (value)
- RTRIM (value)
- Replace (value, X, Y)
  - X= Text to find
  - Y= Text to change to
- Replicate (X, Y)
  - X= Text that will be created
  - Y= number of times text will be copied
- Reverse (value)

Conversions

- Coalesce (value1, value2,value3)
- Nullif (value1, Value2)
  - value 1 = value 2 then NULL
  - Else value 1
- Cast (value as TYPE)
  - Type is the SQL type to change to
    - Int
    - Varchar
  - ANSI-standard SQL
    - Convert(datatype,value,style)
  - Type is the SQL type to change to
    - Int
    - Varchar
    - Datetime

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Formulas and How to use them continued

Conversions Continued

- IsDate (value)
- IsNumeric (value)
- IsNULL (value, X)
  - X will be returned if value is null

Dates

- GetDate ( )
- DateAdd (X, Y, value)
  - X is interval
    - Year, Month, Day, etc...
  - Y is number to add
- DateDiff (X, value1, value2)
  - X is interval
    - Year, Month, Day, etc...

Dates Continued

- DateName (X, value)
  - NVARCHAR
  - X is interval
    - Year, Month, Day, etc...
- DatePart (X, value)
  - INT
  - X is interval
    - Year, Month, Day, etc...
- Day (value)
- Month (value)
- Year (value)

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Formulas and How to use them continued

Math

- Round (value, X)
  - X is decimal place
- Floor (value)
- Ceiling (value)

Case When

- Case When statements allow user to check certain conditions and return a value based on the first met condition
- Case When value <= 55 Then 65 else value end
- Case When value = '0000' Then 'John' When value = '0001' Then 'Wendy' else 'principal missing' end
- Case When left(4, value) = '0000' then replace(value, '0000', ' ') else value end

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Commonly Requested Custom Exports

- **Custom Alerts**
- **Dropped Courses**
- **Parent Login**
- **Class Size**



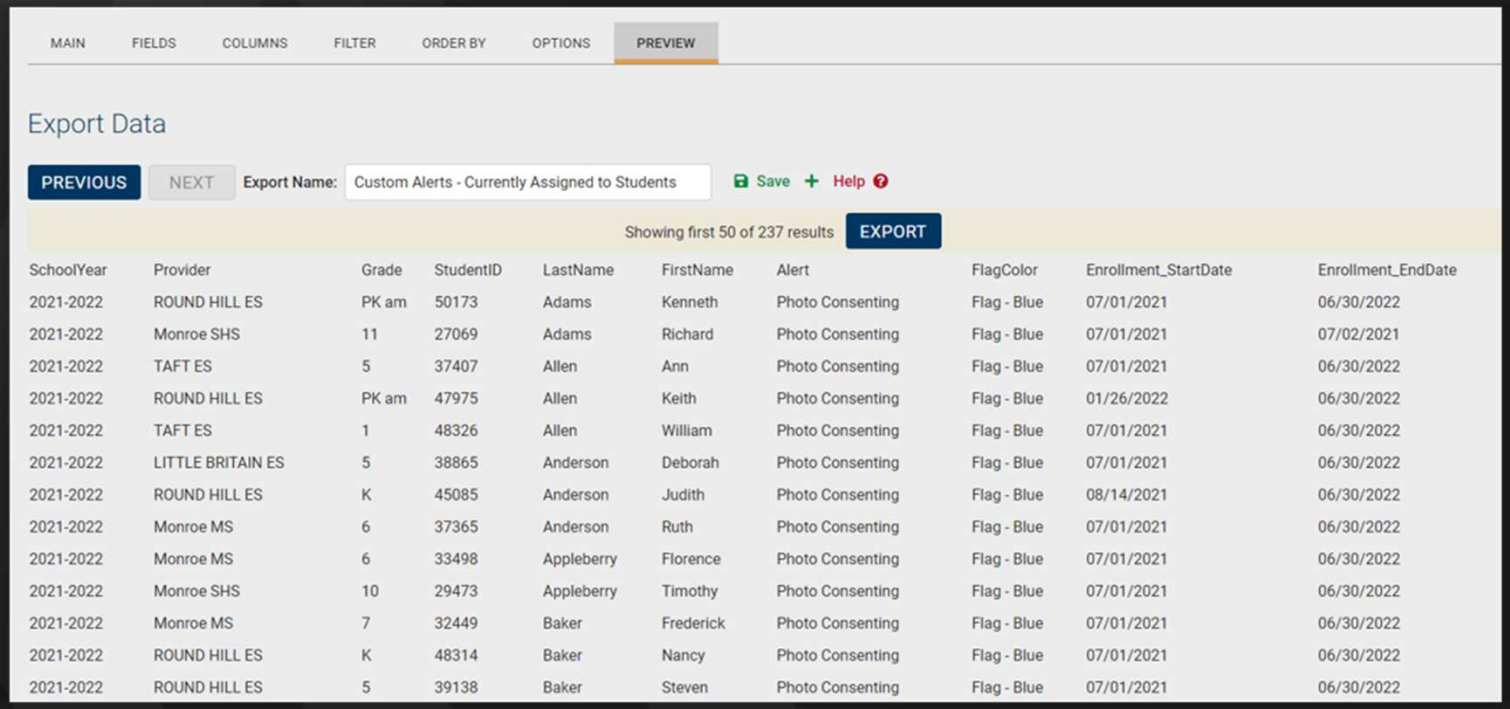
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Custom Alerts Currently Assigned to Student

Tab	Values
Fields	Student_StudentID, Person_FirstName, Person_LastName, StudentEnrollment_Grade, StudentEnrollment_Provider, StudentEnrollment_SchoolYear, StudentEnrollment_StartDate, StudentEnrollment_EndDate PersonCustomAlert_AlertText, PersonCustomAlert_AlertFlagColor
Filters (separate groups)	PersonCustomAlert_AlertText – Not Empty AND StudentEnrollment_SchoolYear = (applicable year) AND StudentEnrollment_MostRecentForYear = ☑

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Custom Alerts Currently Assigned to Student



MAIN | FIELDS | COLUMNS | FILTER | ORDER BY | OPTIONS | PREVIEW

Export Data

PREVIOUS | NEXT | Export Name: Custom Alerts - Currently Assigned to Students | Save | + | Help

Showing first 50 of 237 results | EXPORT

SchoolYear	Provider	Grade	StudentID	LastName	FirstName	Alert	FlagColor	Enrollment_StartDate	Enrollment_EndDate
2021-2022	ROUND HILL ES	PK am	50173	Adams	Kenneth	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	Monroe SHS	11	27069	Adams	Richard	Photo Consenting	Flag - Blue	07/01/2021	07/02/2021
2021-2022	TAFT ES	5	37407	Allen	Ann	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	ROUND HILL ES	PK am	47975	Allen	Keith	Photo Consenting	Flag - Blue	01/26/2022	06/30/2022
2021-2022	TAFT ES	1	48326	Allen	William	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	LITTLE BRITAIN ES	5	38865	Anderson	Deborah	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	ROUND HILL ES	K	45085	Anderson	Judith	Photo Consenting	Flag - Blue	08/14/2021	06/30/2022
2021-2022	Monroe MS	6	37365	Anderson	Ruth	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	Monroe MS	6	33498	Appleberry	Florence	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	Monroe SHS	10	29473	Appleberry	Timothy	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	Monroe MS	7	32449	Baker	Frederick	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	ROUND HILL ES	K	48314	Baker	Nancy	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022
2021-2022	ROUND HILL ES	5	39138	Baker	Steven	Photo Consenting	Flag - Blue	07/01/2021	06/30/2022

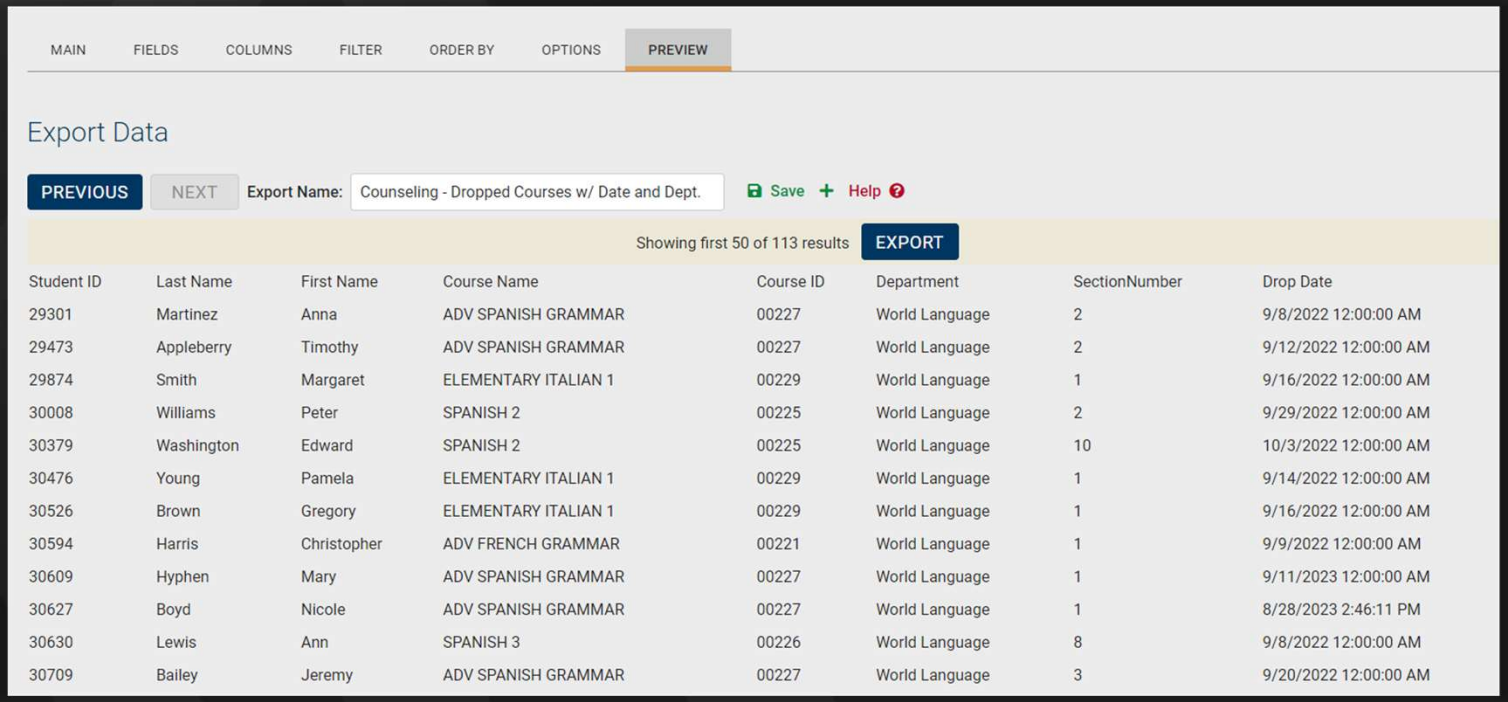
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Counseling – Dropped Course w/Date and Dept.

Tab	Values
Fields	Student_StudentID, Person_FirstName, Person_LastName, StudentSchedule_CourseName, StudentSchedule_CourseID, StudentSchedule_Department, StudentSchedule_SectionNumber, StudentSchedule_DropDate
Filters (separate groups)	StudentSchedule_DropDate – Between (set date range) Prompt at Runtime = ☑ AND StudentSchedule_Department = (applicable Department) Prompt at Runtime = ☑

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Counseling – Dropped Course w/Date and Dept.



MAIN | FIELDS | COLUMNS | FILTER | ORDER BY | OPTIONS | PREVIEW

Export Data

PREVIOUS | NEXT | Export Name: Counseling - Dropped Courses w/ Date and Dept. | Save | Help

Showing first 50 of 113 results | EXPORT

Student ID	Last Name	First Name	Course Name	Course ID	Department	SectionNumber	Drop Date
29301	Martinez	Anna	ADV SPANISH GRAMMAR	00227	World Language	2	9/8/2022 12:00:00 AM
29473	Appleberry	Timothy	ADV SPANISH GRAMMAR	00227	World Language	2	9/12/2022 12:00:00 AM
29874	Smith	Margaret	ELEMENTARY ITALIAN 1	00229	World Language	1	9/16/2022 12:00:00 AM
30008	Williams	Peter	SPANISH 2	00225	World Language	2	9/29/2022 12:00:00 AM
30379	Washington	Edward	SPANISH 2	00225	World Language	10	10/3/2022 12:00:00 AM
30476	Young	Pamela	ELEMENTARY ITALIAN 1	00229	World Language	1	9/14/2022 12:00:00 AM
30526	Brown	Gregory	ELEMENTARY ITALIAN 1	00229	World Language	1	9/16/2022 12:00:00 AM
30594	Harris	Christopher	ADV FRENCH GRAMMAR	00221	World Language	1	9/9/2022 12:00:00 AM
30609	Hyphen	Mary	ADV SPANISH GRAMMAR	00227	World Language	1	9/11/2023 12:00:00 AM
30627	Boyd	Nicole	ADV SPANISH GRAMMAR	00227	World Language	1	8/28/2023 2:46:11 PM
30630	Lewis	Ann	SPANISH 3	00226	World Language	8	9/8/2022 12:00:00 AM
30709	Bailey	Jeremy	ADV SPANISH GRAMMAR	00227	World Language	3	9/20/2022 12:00:00 AM

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Last Logins for Parents

Tab	Values
Fields	Student_StudentID, Person_FirstName, Person_LastName, StudentEnrollment_Grade, PersonContact_Relationship, PersonContact_FirstName, PersonContact_LastName, PersonContact_AccountUserName, PersonContact_AccountLastLoginDateTime
Filters (separate groups)	PersonContact_ParentPortal = ☑

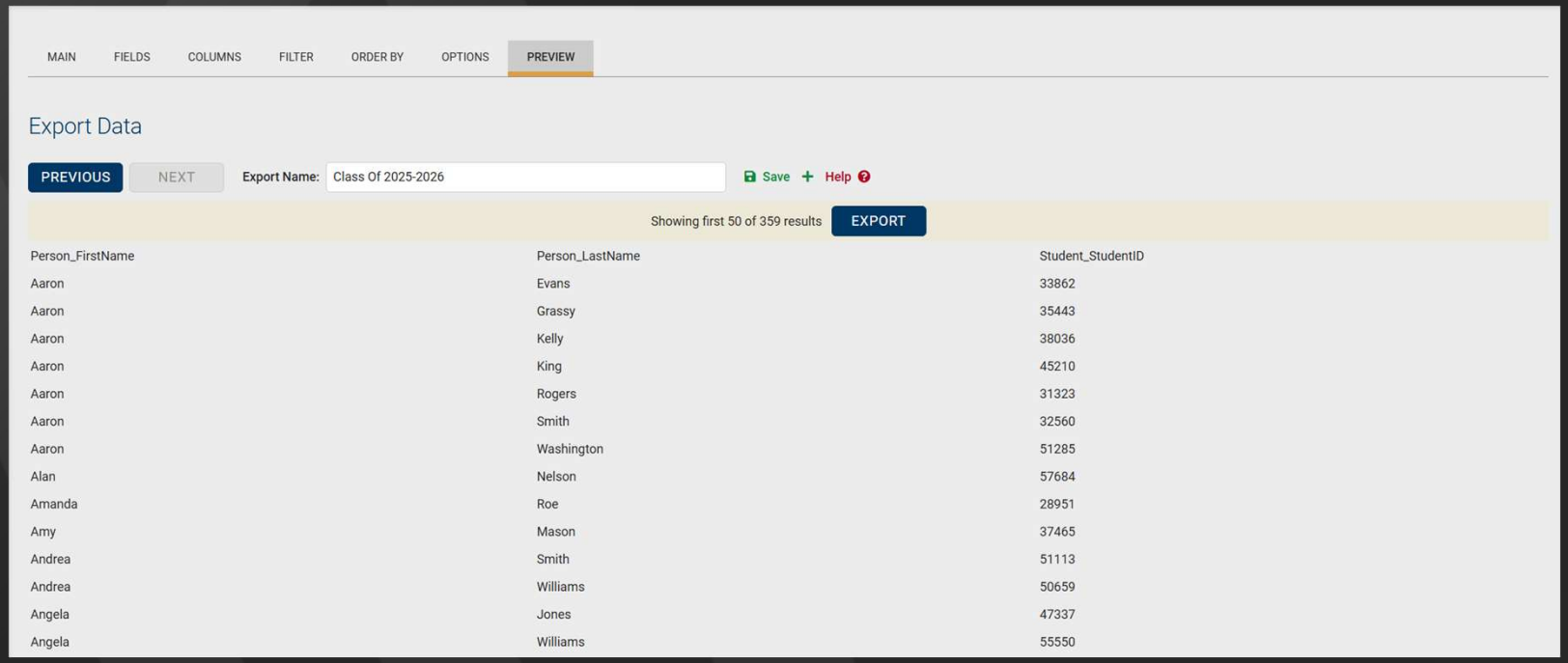
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Class Size

Tab	Values
Fields	Person_FirstName, Person_LastName Student_StudentID
Filters (Or between groups)	StudentEnrollment_MostRecent = ☑ StudentEnrollment_SchoolLevel = Not Empty StudentEnrollment_EndDate = Not Empty StudentEnrollment_ExitReason Contains 'Graduated' StudentEnrollment_Classof = '2025-2026' OR StudentEnrollment_MostRecent = ☑ StudentEnrollment_SchoolLevel = Not Empty StudentEnrollment_EndDate = Empty StudentEnrollment_Classof = '2025-2026' OR StudentEnrollment_MostRecent = ☑ StudentEnrollment_EndDate = Empty StudentEnrollment_IsPlaced = ☑ StudentEnrollment_Classof = '2025-2026' OR StudentEnrollment_MostRecent = ☑ StudentEnrollment_SchoolLevel = Empty StudentEnrollment_EndDate = Not Empty StudentEnrollment_IsPlaced = ☑ StudentEnrollment_ExitReason Contains 'Graduated' StudentEnrollment_Classof = '2025-2026'

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Class Size



Person_FirstName	Person_LastName	Student_StudentID
Aaron	Evans	33862
Aaron	Grassy	35443
Aaron	Kelly	38036
Aaron	King	45210
Aaron	Rogers	31323
Aaron	Smith	32560
Aaron	Washington	51285
Alan	Nelson	57684
Amanda	Roe	28951
Amy	Mason	37465
Andrea	Smith	51113
Andrea	Williams	50659
Angela	Jones	47337
Angela	Williams	55550

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Common Export Errors

- **"Unique" row filter error**
- **Not returning student address information**
- **Duplicate rows**

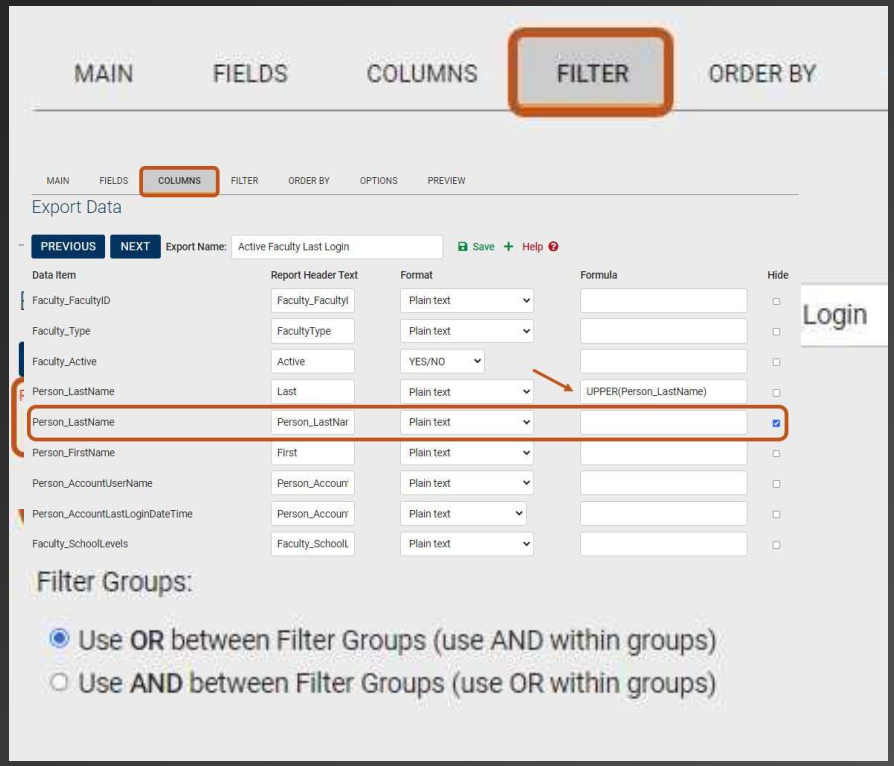


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Why am I receiving an error when using the "Unique" row filter?

Common Cause

- When defining the sort order on the Order by tab
  - The "Unique Row" filter is selected
  - The field chosen as the filter contains a formula
- If a formula is required:
  - Add the desired data field a second time without the formula and hide it by selecting corresponding checkbox in the Columns tab

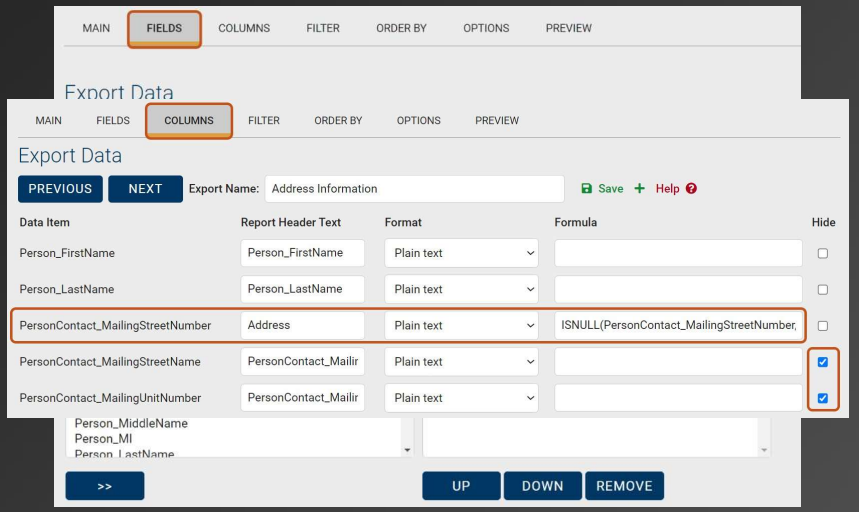


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Why is the Custom Export not returning student address information?

Common Cause

- When utilizing a formula to consolidate address information, a blank value will result in **no return information** for the address
- Solution:
  - Locate the blank value and add **"ISNULL"** in front of the data field
  - Example:
  - ISNULL(PersonContact_MailingStreetNumber,'')+' '+PersonContact_MailingStreetName + ' ' + ISNULL(PersonContact_MailingUnitNumber, '')

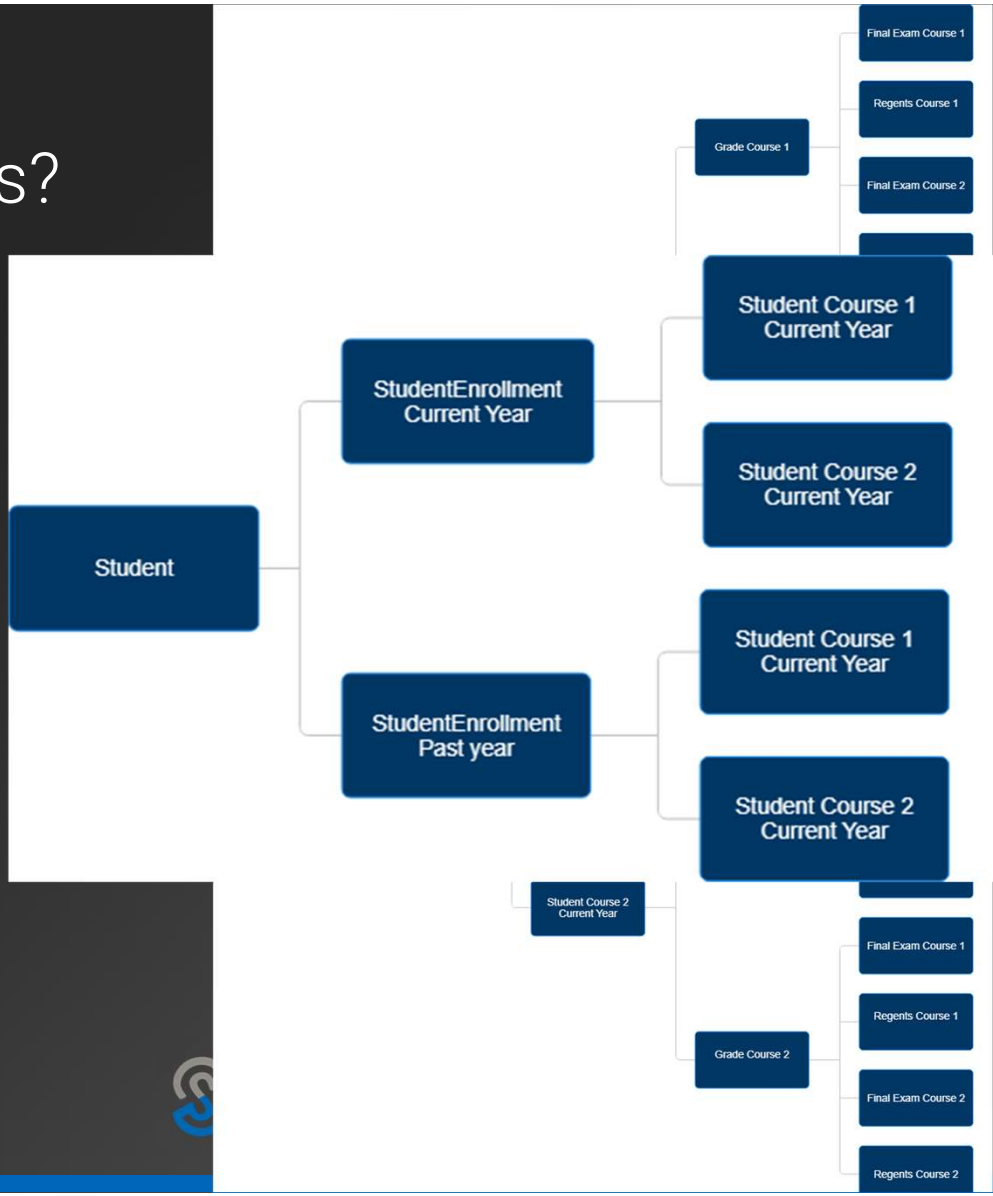


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Why am I getting duplicate rows?

Common Cause

- Using multiple groups that pull multiple rows
- Examples:
  - Enrollment + Schedule
    - Forgot School Year Filter for enrollment
  - Enrollment + Schedule + MP Grades + Assessment

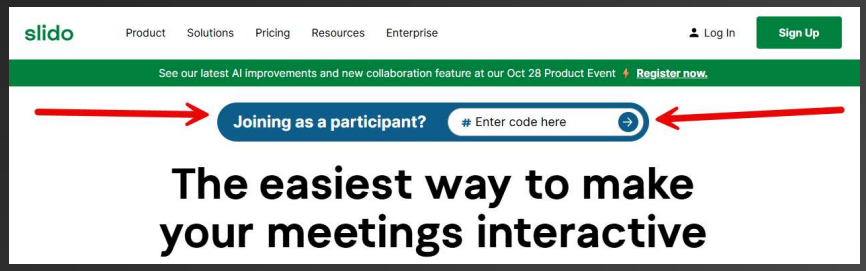


Q&A



Interactive Survey – Please Participate!

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Do not edit
How to change the design



ST: Custom Exports

The Slido app must be installed on every computer you're presenting from

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