Exporting students' data from *Options* into PASS

When you have used **Options** to create a good Pattern of Subjects in blocks, and populated them in such a way as to get good Student Satisfaction, then you will want to get the Names of the students into the correct Teaching Groups in PASS.

There are 2 ways of doing this:
- In **Options** print out the Teaching Groups lists (see page 49 in the **Options** Handbook) and then type all the Students' Names into the correct Teaching Groups in PASS. This is tedious.
or, much better,
- Use the method described in this article. It transfers the data electronically from **Options** to PASS. This populates the option groups, ensures accuracy and will save you a lot of typing time.
  The bigger the school, the more time it will save you.

Check with our web-site <u>and</u> with the HelpDesk at WCBS/PASS to see if there any recent improvements.

In order to import the data electronically into the current (v5.8.1) version of PASS, the file needs to contain:

1. The 'Subject Code', in the same format as it is stored in PASS. Page 2 explains how to ensure this.

2. The 'Pupil Code'. ie. a unique identifier in PASS for each student.
   This is so that PASS can recognise each student unambiguously.
   This Code is stored in PASS and is imported into **Options** as explained on page 3.

3. The 'Subject Set Code' as it is called in PASS (in **Options** we call it the TeachingGroupName or TGN).
   The Teaching Groups in your final **Options** Pattern have to be given the same TeachingGroupNames as already exist in PASS. This is so that PASS can recognise what to do with the data.
   Pages 5-6 explains how to enter these 'Subject Set Codes' into **Options**.

Options will export a file with exactly these properties, ready for you to import it into PASS, as explained on page 7. The import tells PASS the details of which Students are in each Teaching Group in each Block.


Contents

A. Exporting the Subject Codes from PASS

At some stage before exporting the final Options data from the **Options** program, you need to ensure that the Subjects have exactly the <u>same</u> Subject Codes as are used in PASS.

You don't have to have the codes identical from the start of using **Options** but it is probably the simplest. Alternatively, you can change the Subject Names in **Options** at any stage, as long as they are correct before you export the data from **Options** to import it into PASS (on page 7).

The first step is to Export, from PASS, the Subject Codes that it is using.
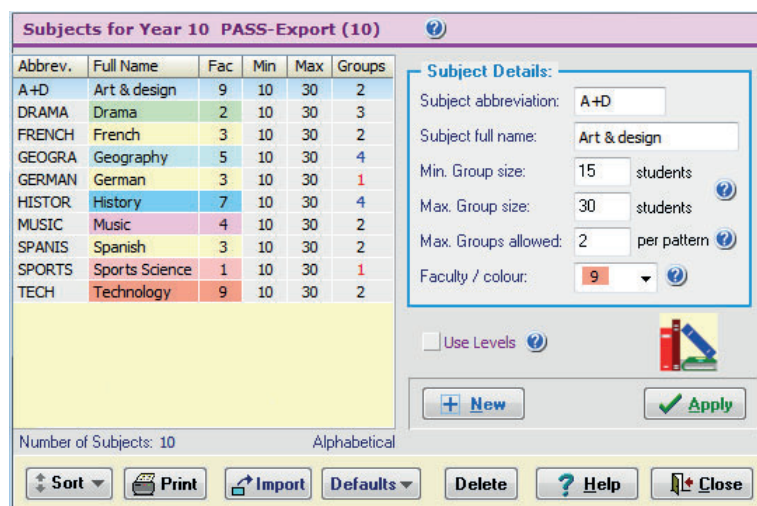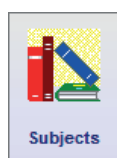
Follow this route:
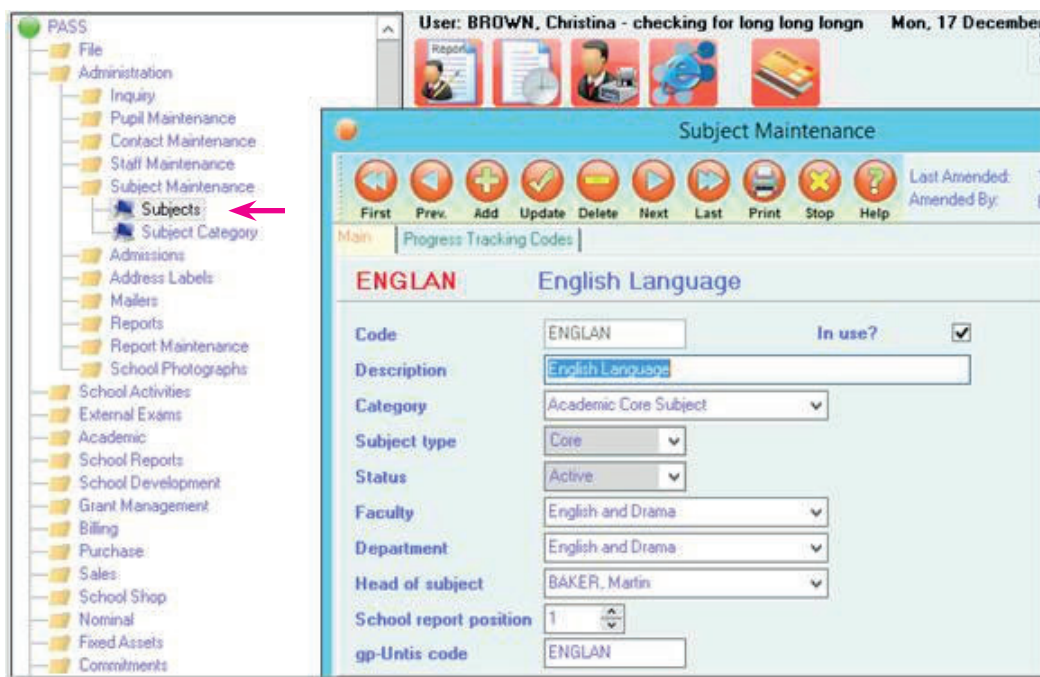
Export the list of Subjects as a CSV file, which looks like this:

(Maximum length of the Subject Code = 6 characters)

	A	B
1	Code	Description
2	A+D	Art & Design
3	DRAMA	Drama
4	FRENCH	French
5	GEOGRA	Geography
6	GERMAN	German
7	HISTOR	History

Then go to the Subjects Screen in **Options**:

and use the CSV file from PASS to either Enter or Edit the PASS Subject **Codes** on this Subjects Screen (for the optional Subjects that are to be in your Option Blocks/Columns).
You can use <u>either</u> the Abbreviations column (as above) <u>or</u> the Full Name column, but be consistent.
During the export (page 7) you will be asked which column you've used.

Then click 'Apply', Close, Save -> Yes

B. Exporting the Pupil Codes (and Names) from PASS

At some stage before exporting the final Options data from the *Options* program, you need to ensure that each of the Students has exactly the same **Pupil Code** that is used in PASS. This is essential for PASS to recognise the students during the import (page 7).

You don't have to have the correct Codes from the start of using *Options* but that is probably the simplest.

To do this, the first step is to Export (from PASS) the Pupil Code that it is using for each named pupil. Follow this route:

Export the list of Pupil Codes as a CSV file, which looks like this:
(Maximum length of a pupil code = 8 characters)

	A	B	C	D
1	code	surname	first_names	gender
2	ABB001	Abbey	Fred	M
3	ADA001	Adams	Michael James	M
4	ADA002	Adams	Melvin James	M
5	ADA003	Adams	Eliza	F
6	ALD001	Alder	Claire Deborah	F
7	ALD002	Aldernan	Keith	M
8	ALL001	Allen	Kirsty Ann	F
9	ARK001	Arkan	James	M
10	ARK002	Arkan	Josephine	F

Importing this CSV file into *Options*

The pupil Code in the first column (A) is to be imported into the 'UPN'* field in *Options*. If you don't already have UPNs switched on in *Options*, you will need to first tick the option at: Customize ➠ Record Student UPNs / ULNs*.

Then import this data from PASS into *Options,* as described in the orange Options Handbook on page **42**, or: in the PDF of the Handbook : www.timetabler.com/Options-Handbook.pdf   page **42**, or: on the 'Index' Tab in the HelpScreens, find: "Importing Students' Names : Import Screen".

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Alternatively, if you have completed your work in *Options* without using Pupil Codes (UPNs*), then you <u>don't</u> need to start over again. You can simply update your students in *Options* with their Pupil Codes (UPNs) from PASS by following these 2 steps:

i) Create a file in PASS that contains your students' forenames & surnames and their Pupil Codes, as above.

ii) In *Options*, go to: Students and Choices ➠ Other checks ➠ Re-import UPNs from a file.
    This will add the PASS Pupil Codes into the UPN field of each of your students, so you can then export back to PASS, as described on page 7.

* UPN = Unique Pupil Number.   ULN = Unique Learner Number.

Using *Options* to get the best Pattern for these students

You do this in the usual way, as described in detail in the orange *Options* Handbook, and summarised on pages 40-41 in that Handbook.

Tidy up the Pattern, and adjust the Group Sizes as necessary.

For more details, in the orange *Options* Handbook:

AutoCreate, Improve, and 'Seed'	pages 28, 34 – 37
Adjusting any Rules	pages 38 – 39
Adjusting Group Sizes using 'Shuffle', 'Bunch', 'Equalize', etc	pages 29 – 33
Review & Counsel : Using the Student Inspector Screen	Appendix 1

Note :
If you haven't already done steps A and B (pages 2 and 3), do them now.

C. Exporting the Subject Set Codes (TGNs) used by PASS, and entering them into *Options*

In order that PASS can recognise each Teaching Group in your pattern, and relate it the Teaching Groups already set up in PASS (so that it can then place each student in the correct group), each Teaching Group in *Options* must be given the correct TeachingGroupName (TGN).
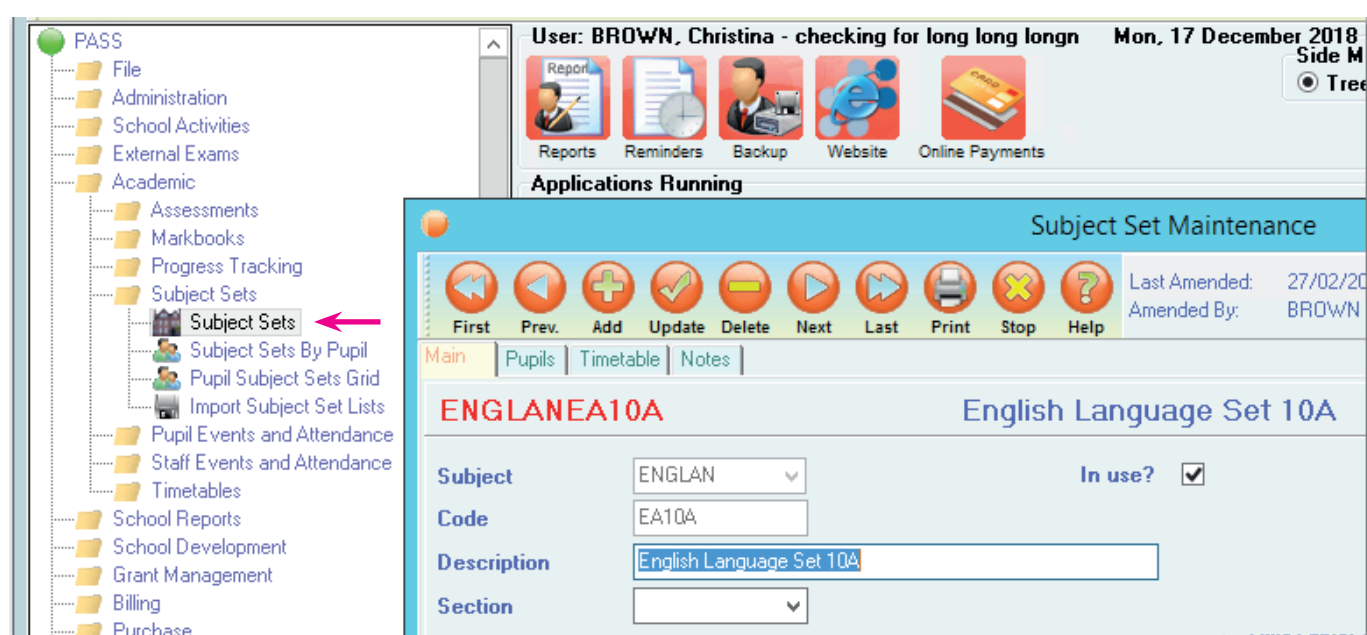
There are 2 steps to do this:

1. Get a CSV file from PASS of what the TeachingGroupNames ('Subject Set Codes') are for this YearGroup.

2. Enter those TeachingGroupNames into *Options*.

These 2 steps are covered in turn.

1. Getting a CSV file from PASS of the names of the PASS 'Subject Set Codes' (TGNs)

To do this, follow this route:

Export the list of Subject Set Codes as a CSV file, which looks like this:
(Maximum length = 6 characters)

These Subject Set Codes in PASS can be any format, whatever you or your colleagues have chosen ...but it is essential that

- there is a Subject Set Code in PASS for each Teaching Group in your Options Pattern, and

- you use these same Subject Set Codes (TGNs) in *Options*, as described on the next page.

	A	B
1	Set	Subject
2	EA10A	ENGLAN
3	EA10B	ENGLAN
4	EA10C	ENGLAN
5	FR10A	FRENCH
6	FR10B	FRENCH
7	GE10A	GEOGRA
8	GE10B	GEOGRA
9	HI10A	HISTOR
10	HI10B	HISTOR

Stage C (continued)

2. Entering the Teaching Group Names into *Options*

In *Options*, you need to give each of the groups on your pattern a Teaching Group Name (**TGN**).

To do this, go to the **Current Pattern Screen**:

Click on the **TGNs** button [TGNs ▾] and then tick **Display Teaching Group Names**.

You will see a blue **[?]** appear by any group that does not yet have a TGN:

Click on the **[?]** and enter the TGN for that group (eg. FR10B):

To find and enter the correct TGN for each group,
- highlight one of the groups (highlighted in yellow), click on **[?]**,
- to help you identify the group, the screen shows 6 students in it:
- from the PASS CSV file (previous page) find the correct name of the TGN for this subject group,
- enter the TGN, in the box shown here:

Note : This needs to be *exactly* the same as the Subject Set Code used in PASS.   If they are not the same, then PASS will not import this group's students.

The screen shows what you have entered:

Continue until each of the groups has got a TGN entered.

D. Exporting the data from *Options*, as a spreadsheet ready for importing into PASS

In *Options,* go to Export
➠ MIS / Admin System
➠ Populate Teaching Groups in WCBS/PASS:
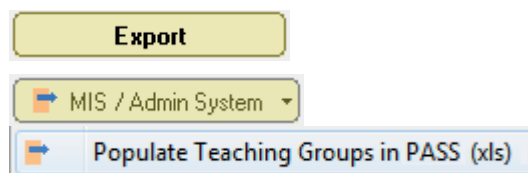
Then click on the **Export now** button:

Choose where you want to save the file, and click OK.

If *Options* is on a different network from PASS then save the file to a memorystick.

Options saves a spreadsheet file called: Options_TT_WCBS.xls like this:
This is the file that will be imported into PASS.

You can click on the Open now button to check that the file is correct and that every student has the correct items. Perhaps make a few spot-checks?
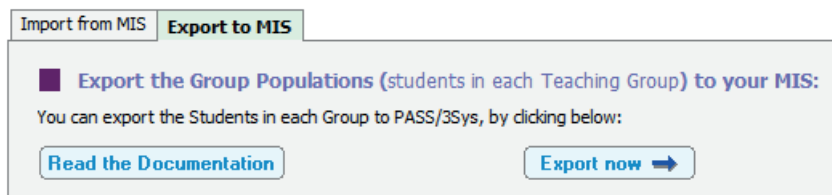
	A	B	C
1	Subject	Set Code	Pupil Code
2	HISTOR	HI10A	ABB001
3	SPANIS	SP10B	ABB001
4	GEOGRA	GE10D	ABB001
5	SPORTS	SP10A	ABB001
6	DRAMA	DR10A	ABLE03
7	GEOGRA	GE10B	ABLE03
8	FRENCH	FR10C	ABLE03
9	MUSIC	MU10B	ABLE03
10	SPANIS	SP10A	ADAM01

E. Importing this spreadsheet into PASS

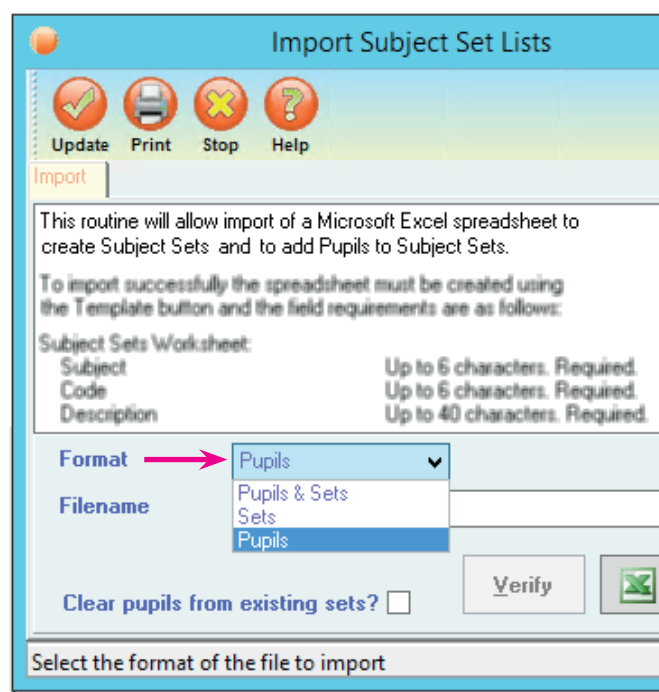In **PASS** go to to the section that imports the spreadsheet, via this route:
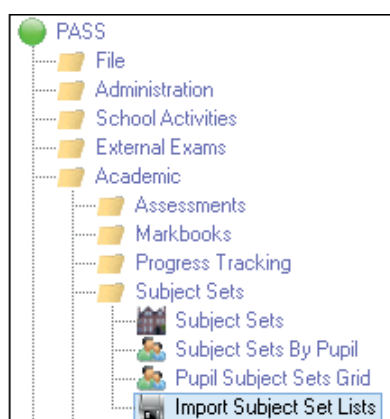
At 'Format', choose 'Pupils' (only):

Refer to PASS documentation for any further details of this stage.
The pupils' Choices are imported and the Pupils are automatically assigned to the correct Groups.

Once imported it may be wise to make a few spot-checks of students.

Our thanks to Jamie Darby and to WCBS staff for their help in preparing this document.