



Infohio Export Checklist

Infohio Export

The Infohio Export is usually performed on a nightly basis to send demographic data from StudentInformation to Infohio for use in the Patron files in the library software. Most ITC's set up the exports to run automatically at night for each of their buildings. Three separate options are available in DASL Options for the homeroom assignment to include in the record for each building. While this checklist provides instruction on how to create the file, here are some additional tips you should know about this process.



NOTE: If the nightly extracts fail to complete, the file created from StudentInformation doesn't get loaded into the Library system. When no record comes over from StudentInformation for a student, regardless of the reason, the student, the student automatically gets changed to "Expired" in Infohio. If a new record is loaded for a student to correct the issue, the student's status will be updated automatically.



NOTE: ITC Staff should check the logs daily to ensure that the extracts and loads completed successfully. If logs are checked first thing in the morning and it is discovered that a load failed, once the issue is identified, and the resolution found, extracts can be reprocessed and the files reloaded to quickly resolve the issue. Log files for the StudentInformation extractions reside in the DASL _Log directory on the alpha.



NOTE: StudentInformation Support staff should notify Infohio support when a StudentInformation update is applied in case something changes that has an affect on the data extracted nightly. This would be an especially important time to check those nightly logs to make sure there are no problems as a result of the update.



Note: For any of the homeroom options used, it is possible that the value of a student's homeroom may change at the end of the semester or quarter. Make sure the files are checked at that time to ensure all necessary homeroom information is there. If a student is missing homeroom information in the record, the student's homeroom will be changed to "unknown" in the Library software. The INFOhio Export will only use the finalized schedule.



Note: In order for a student to be included in the file, the student must have an annual record in the current school year as well as a LIVE EMIS time period record. EMIS time period records are created for all students regardless of whether a district reports to EMIS or not. If a student is not included in the file and it is not because of the student's status code, then the user should check the student's admission history detail records to make sure that the student has a record for the current school year. Navigate to **StudentInformation >> SIS >> Student >> Admission History >> Edit History Details** and check for a record in the current school year.



Note: Student status codes play a big part in which students get included in the file. On the Student Status Code Maintenance page, any status code defined with an internal status of "Inactive" or "Deleted" will not be included in the file. This may include students who are residents attending elsewhere if they use a separate status code for these students and make them "inactive" internally. Navigate to **StudentInformation >> Management >> School Administration >> Student Codes Administration >> Student Status Codes** to check to see how status codes are configured. Here is a sample from StudentInformation:

		Code	Name ^	Overall Student Status	Description	Active
X		A	ACTIVE RES	Active	ACTIVE RES	
X		D	DELETED	Deleted	DELETED	
X		I	INACTIVE	Inactive	INACTIVE	
X		N	NON-RES	Active	NON-RES	
X		O	OTH NONRES	Inactive	OTH NONRES	
X		U	OTH RE A/E	Active	OTH RE A/E	
X		Q	OTH RESIDE	Inactive	OTH RESIDE	
X		R	RES A/ELSE	Inactive	RES A/ELSE	
X		J	RES A/JVS	Inactive	RES Attending JVS	

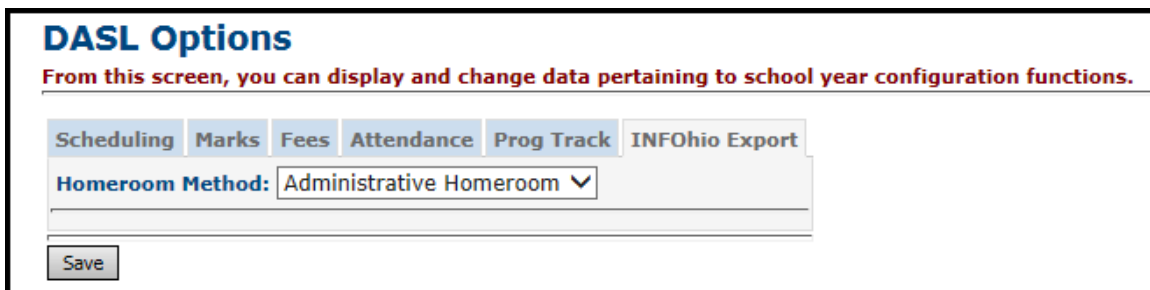
☒ Show Active Only

□ Task #1 - Update DASL Options – Infohio Tab

The DASL Options - Infohio tab allows the district to choose which homeroom they wish to use in the export file.

Homeroom Method – Select from the drop down box a default method for exporting Homeroom in the INFOhio Export. Valid choices are Administrative Homeroom, Period Homeroom and Department Homeroom. The Default choice is Administrative Homeroom.

Administrative Homeroom

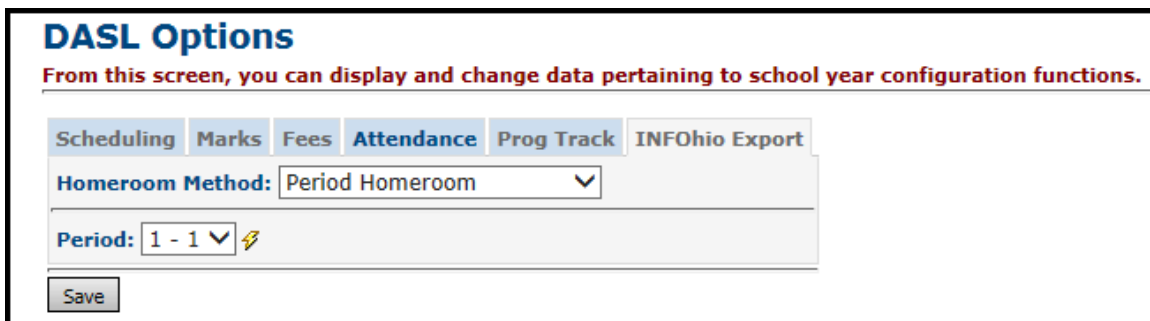


The screenshot shows the 'DASL Options' interface. At the top, it says 'From this screen, you can display and change data pertaining to school year configuration functions.' Below this is a row of tabs: 'Scheduling', 'Marks', 'Fees', 'Attendance', 'Prog Track', and 'INFOhio Export'. The 'INFOhio Export' tab is selected. Under this tab, there is a label 'Homeroom Method:' followed by a dropdown menu showing 'Administrative Homeroom'. Below the dropdown is a 'Save' button.

If the Administrative homeroom is chosen, the student's administrative homeroom as assigned on the student profile edit page will be used. If a student has no administrative homeroom, the homeroom information will be empty on the student's record in the export file.

Period Homeroom

If you select "Period Homeroom", you must also select the period course sections meet that you wish to use as the homeroom period.



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Any course section the student is assigned to that meets the selected period will be used as the homeroom. The teacher and location from the course section will be used as homeroom teacher and room in the export record.

Department Homeroom

If you select “Department Homeroom”, you must also select the department code of the courses you wish to use homeroom period.

DASL Options
From this screen, you can display and change data pertaining to school year configuration functions.

Scheduling

Marks

Fees

Attendance

Prog Track

INFOhio Export

Homeroom Method:

Department Homeroom

▼

Department:

ENG - ENGLISH DEPT

▼

⚡

Save

Any course section the student is assigned to that meets has the selected department assigned to the course will be used as the homeroom. The teacher and location from the course matching the selected department will be used as homeroom teacher and room in the export record.



For the department and period methods, if a student has no course section assignments which meet the criteria for department and period, the student will have no homeroom information in the records in the export file.

☐ Task #2 - Run the Infohio Export

These instructions only apply when running the export manually.



Check with your Librarians to determine which fields they wish to have included in the export file.

1. Change Context to the building level.
2. Navigate to : **StudentInformation** » **Management** » **Import/Export** » **INFOHIO Export**
3. The Export page will present the user with a list of fields with a checkbox preceeding each field. Click on each checkbox to include the corresponding data element in the record.
4. Click the ***Export button.***
5. A window will open on the page and the user will be prompted to Open, Save or Cancel. This allows you to save the file to a designated location, open the file on your screen or cancel the export.
6. Select "Save" and save the file to your hard drive.
7. Send the file to the Infohio support person for further processing.

Any course section the student is assigned to that meets has the selected department assigned to the course will be used as the homeroom. The teacher and location from the course matching the selected department will be used as homeroom teacher and room in the export record.