

PencilBox

MySchool Interface

*Manual compiled for
PencilBox version 9.13.0003*

INTRODUCTION

The MySchool Interface was developed to assist our PencilBox Schools in sending information to MySchool. Following the steps below will create a file of learner information, drawn from PencilBox Standard fields*, that will then be emailed to MySchool. You will need to download Version 9.13.0003 or later in order to use the MySchool Interface.

*(Standard fields refer to the fields found on the LEARNER DETAILS, PARENT DETAILS and FAMILY DETAILS screens in FAMILY/PARENTS/LEARNERS.)

STEP 1: CREATING THE MYSCHOOL REPORT

The Report created in this step, enables you to link the specific fields required by MySchool to the corresponding information in PencilBox – in other words you are telling the MySchool field where to go in PencilBox to find the required information. Once the Report has been created, the links for all the fields will be in place. Should you not wish to send certain information to MySchool (e.g. cell numbers) you are able to unlink the MySchool field and the corresponding PencilBox field.

1. Go to GENERAL / MAINTENANCE / ADDITIONAL FIELDS.
2. Click on the REPORTS button at the bottom of the screen.
3. Click on the SETUP button at the bottom left of the screen to create the MYSCHOOL Report – MS-MYSCHOOL EXTRACT (and LE-LURITS (EDUCATOR), LL-LURITS (LEARNER)) will now be visible in the REPORTS drop-down box at the top of the screen.
4. Select the MS-MYSCHOOL EXTRACT from the REPORTS drop-down box at the top of the screen:

Report						
MS - MySchool extract						
	Code	Interface	Description	Comp	Table	Field
1	0001	LearnerCode	Learner Code	<input checked="" type="checkbox"/>	L - Learner	SYSTEM0002 - LearnerCode
2	0002	LearnerName	First Name	<input checked="" type="checkbox"/>	L - Learner	SYSTEM0004 - FirstNames:1
3	0003	LearnerSurname	Learner Surname	<input checked="" type="checkbox"/>	L - Learner	SYSTEM0003 - Surname
4	0004	Grade	Grade	<input checked="" type="checkbox"/>	Y - Learner years	CGR - Current grade
5	0005	Class	Class	<input checked="" type="checkbox"/>	Y - Learner years	CCL - Current class
6	0006	ClassName	Class Name	<input checked="" type="checkbox"/>	Y - Learner years	CCN - Current class name
7	0007	IDNumber	L:ID Number	<input checked="" type="checkbox"/>	L - Learner	SYSTEM0008 - IDNumber
8	0008	BirthDate	Date of Birth	<input checked="" type="checkbox"/>	L - Learner	SYSTEM0009 - DateOfBirth
9	0009	ParentTitle1	P:Title 1	<input checked="" type="checkbox"/>	P - Parent	SYSTEM0007 - Title

The following columns are visible:

- **CODE:** The MySchool code
 - **INTERFACE:** The fields required (and as named) by MySchool.
 - **DESCRIPTION:** A description of the MySchool field in the INTERFACE column
 - **COMP:** All the fields have been ticked as compulsory, but you may unlink any of the following fields:
PIDNumber1, PTelephoneCell1, PEmailAddress1, PIDNumber2, PTelephoneCell2, PEmailAddress2
 - **TABLE:** The screen in PencilBox which will supply the required MySchool information. The available Tables to choose from the dropdown list are:

F – FAMILY	(provides list of standard Family fields)
FA – FAMILY ADD FIELDS	(provides list of Family additional fields)
P – PARENT	(provides list of standard Parent fields)
PA – PARENT ADD FIELDS	(provides list of Parent additional fields)
L – LEARNER	(provides list of standard Learner fields)
LA – LEARNER ADD FIELDS	(provides list of Learner additional fields)
Y – LEARNER YEARS	(provides list of Learner Grade Year info)
T – STATIC VALUE	(used if the same value as defined in the field column is to be given to all learners)
S – STAFF	(provides list of standard Staff fields)
SA – STAFF ADD FIELDS	(provides list of Staff additional fields)
 - **FIELD:** The field on the chosen screen in PencilBox that will be linked to (and that can supply the correct information for) the MySchool field specified in the INTERFACE column
6. The MySchool field in Row 0001 is LEARNERCODE. The TABLE selected in the TABLE column is L – LEARNER as this is the screen where the Learner’s Code is stored in PencilBox and the FIELD that is selected in the FIELD column is SYSTEM0002 – LEARNERCODE. Taking another example: The MySchool field in Row 0009 is PARENTTITLE1. The TABLE selected in the TABLE column is P – PARENT as this is the screen where the Parent’s Title is stored in PencilBox and the FIELD that is selected in the FIELD column is SYSTEM0007 – TITLE. Check each row to ensure that the correct TABLE in the TABLE column and the correct PencilBox field in the FIELD column has been selected.
7. To unlink the MySchool field and the corresponding PencilBox field so that the information is not sent to MySchool, select NONE from the drop-down list in TABLE column and click on the SAVE button.

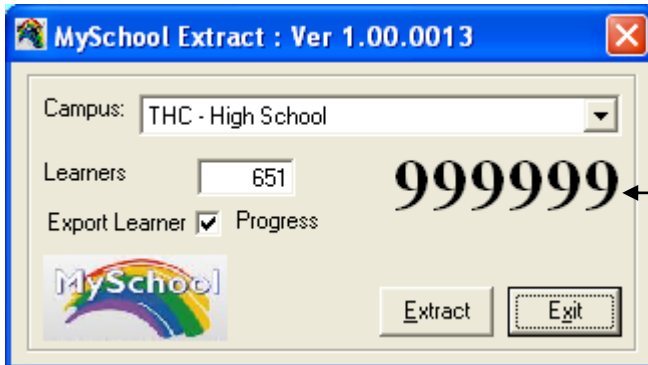
STEP 2: COMPLETING INSTITUTION CAMPUS INFO

1. Go to GENERAL / MAINTENANCE / INSTITUTION/CAMPUS.
2. Select the CAMPUS tab and select a CAMPUS from the CAMPUS box on the left.
3. Fill in the MYSCHOOL REF. field with your MySchool Reference number and click on SAVE.
4. Fill in the correct reference number for any remaining campuses.



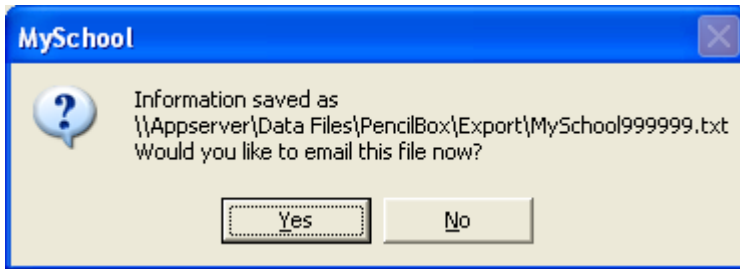
STEP 3: SENDING THE MYSCHOOL REPORT

1. Click on START / ALL PROGRAMS / PENCILBOX SCHOOL ADMINISTRATION / MYSCHOOL EXTRACTOR:

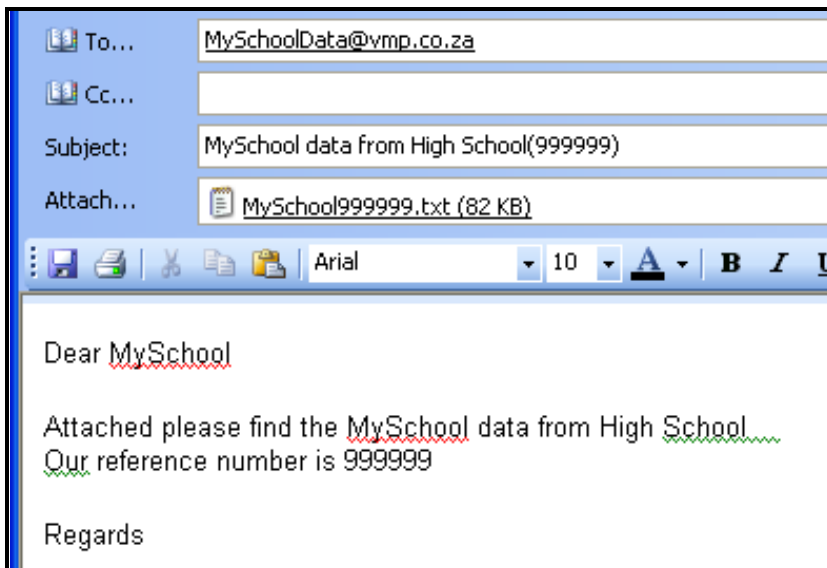


MySchool Reference Number – pulling from GENERAL / MAINTENANCE / INSTITUTION/CAMPUS in PencilBox

2. Select a Campus from the Campus drop-down box.
3. Ensure the EXPORT LEARNER checkbox is ticked.
4. Click on the EXTRACT button. Once the information has been extracted, the following window will appear:



5. Click on YES.
6. The Microsoft Outlook New Mail Message window will open filled in as follows. Fill in any missing information and send as usual:



7. If you have more than one campus, Go back to START / ALL PROGRAMS / PENCILBOX SCHOOL ADMINISTRATION / MYSCHOOL EXTRACTOR and send any other campuses similarly.

