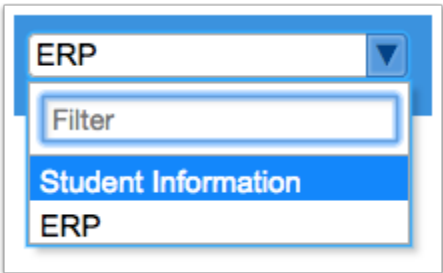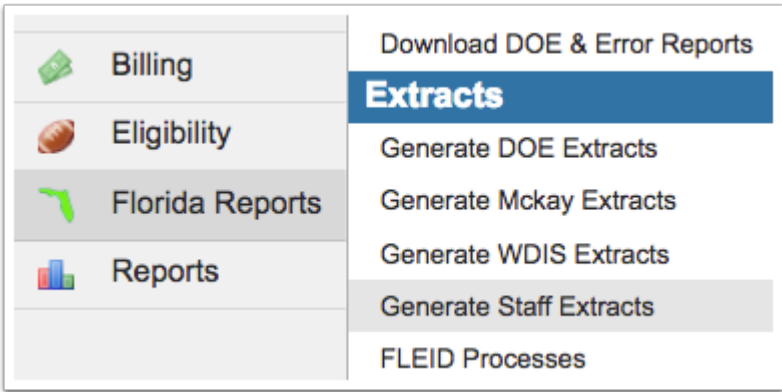# Generate Staff Extracts

The Generate Staff Extracts screen makes generating, viewing, and downloading data for multiple surveys possible. In addition to downloading, reviewing, etc., you can also send one or multiple survey extracts directly from this screen.

Generate Staff Extracts

ℹ️ The Generate Staff Extracts screen is located on the Student Information System (SIS), not the Enterprise Resource Planning System (ERP). Click the **ERP** pull-down and select **SIS** to navigate and utilize this screen.

1. From the **Florida Reports** menu, click **Generate Staff Extracts**.

2. On the Generate Staff Extracts screen, use the **Survey** pull-down to select the correct survey data.

3. The **Effective Date** should be completed with Date Certain. Here you can select the correct month, day, and year from the provided pull-downs, or click the **calendar** icon for a calendar view.

4. The **Survey Window** should be completed with the 11-day attendance window. Here you can select the correct month, day, and year from the provided pull-downs, or click the **calendar** icon for a calendar view.

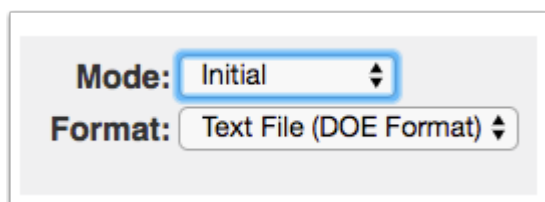**5.** The **Mode** defaults to Initial. Use the pull-down to select Magic Batch instead when applicable.

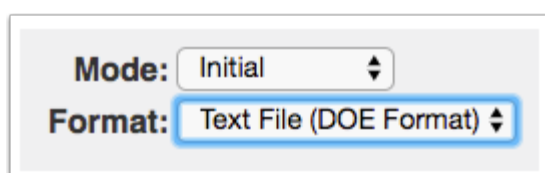> **Mode:** Initial
> **Format:** Text File (DOE Format)

a. Initial should be selected for initial files that have not yet been sent to DOE and/or are not at least 80% error-free. Doing so, will generate the initial file along with the appropriate header record.

> ❗ The Initial record must first be accepted by the state before a Magic Batch can be sent.

b. Magic Batch should be selected once the data is at least 80% error-free and data has been compared to the O-file sent by DOE (this is done in step 7b when the O-file(s) are downloaded). Note: Magic Batch cannot be used without the O-file data.

> ℹ️ The O-file is data sent back from DOE once the initial has been sent. It is sent back with all original data including errors that must be addressed.

6. Select the **Format** in which you'd like to extract and view or send data.

> **Mode:** Initial
> **Format:** Text File (DOE Format)

a. Text File (DOE Format) can be selected to view data from the perspective of DOE without extracting data to be sent to the state.

b. Excel CVS File can be used to view data the same as the Text File in a more readable format; while DOE format is one line of data, the Excel formats presents data in columns.

c. DOE FTP should be selected when you are ready to send extracts to DOE. Once selected, you will notice a **Send Extract(s)** button appear below the pull-down.

7. Once all formatting has been selected, you have several buttons to decide how you would like to download and view extracts.

⚠ You must first make selections using the check boxes provided next to each section. Click the **Select All** check box to select all check boxes displayed and generate an extract for all sections.

a. Click **Generate Extract(s)** to pull all data and create an extract. Once this has been done, you will see **Extract Successful** next to a green check mark. Note: The green check mark will disappear after a few minutes. Note: This only has to be done once unless data has been changed or updated. Generating the extract now makes it available for downloading and viewing.

b. Click **Download O-file(s)** to download original files from DOE, in addition to errors that need to be addressed after the initial extract. The O-file is your data reviewed and sent back by DOE; downloading it synchs your data with that of DOE.

c. Click **Download Edit/Validation File(s)** to populate data tables with additional validation codes.

8. The next section lists all of the different extracts with the option to download, view, look at history, and send.

a. To view the extract, click **Download Extract**. The type of file that downloads here is dependent upon the Format selected in step 6.

The image displayed shows an example of a **Text File (DOE Format):**

The image displayed shows an example of an **Excel CSV File**:

	A	B	C	D	E	F	G
1	District Num	Social Securi	Survey Perio	Fiscal Year	School Numb	Job Code, Ad	Job Code FTE
2	61		2	1718	41	52014	40
3	61		2	1718	9007	75032	114
4	61		2	1718	251	51073	50
5	61		2	1718	41	51090	40
6	61		2	1718	41	52014	40
7	61		2	1718	111	51054	30
8	61		2	1718	111	51016	25
9	61		2	1718	41	99998	114
10	61		2	1718	111	51040	25
11	61		2	1718	111	51040	25
12	61		2	1718	201	52014	84
13	61		2	1718	101	51033	40
14	61		2	1718	143	63012	40
15	61		2	1718	143	63012	60

b. Click the **HTML View** button to view the extract in a new screen and view data in a more readable format via Focus.

Generate Staff Extracts - Staff Additional Job Assignments

Go back

Initial Dataset Unlocked   Lock Initial

125 records

District Number	Social Security Number	Survey Period Code	Fiscal Year	School Number, Primary/Home	Job Code, Additional	Job Code FTE	Fund Source 1	Job Code Fund Perc	Fund Source 2	Job Code Fund Perc	Fund Source 3	Job Code Fund Perc	Transaction Code	Highly Qualified Paraprofessional
61		2	1718	0041	52014	040		000	0	000	0	000	A	Z
61		2	1718	9007	75032	114		000	0	000	0	000	A	Z
61		2	1718	0251	51073	050		000	0	000	0	000	A	Z
61		2	1718	0041	51090	040		000	0	000	0	000	A	Z

i. Click the **Go back** link to navigate from the HTML View of the extract back to the Generate Staff Extracts screen.

Generate Staff Extracts - Staff

Go back

Initial Dataset Unlocked   Lock Initial

125 records

ii. As displayed, this initial extract is currently Unlocked meaning that data can be updated, edited, and the extract regenerated. If data needs to be temporarily frozen, the data can be locked using the **Lock Initial** button.

iii. To export the extract displayed on this screen to an excel spreadsheet, you can click the floppy disk **Save** icon located directly next to the number of records.

💡 Data on this screen can be reorganized and resorted by clicking on the **headers**. Click once for ascending results; click twice for descending results.

🔓 Initial Dataset Unlocked [Lock Initial]

125 records 🖫

District Number	Social Security Number	Survey Period Code	Fiscal Year	School Number, Primary/Home	Job Code, Additional	Job Code FTE	Fund Source 1
61		2	1718	0041	51033	040	
61		2	1718	0041	51015	020	
61		2	1718	0041	52014	040	
61		2	1718	0041	52014	020	

c. For a complete history of users who have generated extracts, click **Extract History.**

Extract User	School Year	Survey	Extract	Mode	Process	Time and Date	Number of Records
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:43	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:22	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:21	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:15	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:12	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:07	1301
Support, Focus	2017-2018	3	Staff Additional Compensation	INITIAL	Generate Extract(s)	01/12/2018 17:07	1301

i. Clicking Extract History will generate a pop-up screen that lists the Extract User, School Year, Survey Extract, Mode, Process, Time and Date, and the Number of Records.

d. Send Via FTP is used when you are ready to send data to the state. Note: This button only displays if **DOE FTP** is chosen in the Format pull-down in step 6. When the files have been successfully sent, you will see a green check mark displayed as shown in the image.

Training Documentation

📄 Generate_Staff_Extracts_Training_Doc_2018.docx