

PARENT ACCESS WEBSITE SET UP

There are 2 separate processes that must occur in order to create merged letters or labels. First convert the Progress Book data file to an Excel file, then merge the Excel file with a letter or labels.

Create User Accounts

1. Run "Create User Accounts" from PB Home, Tools menu Message will state accounts have been created.

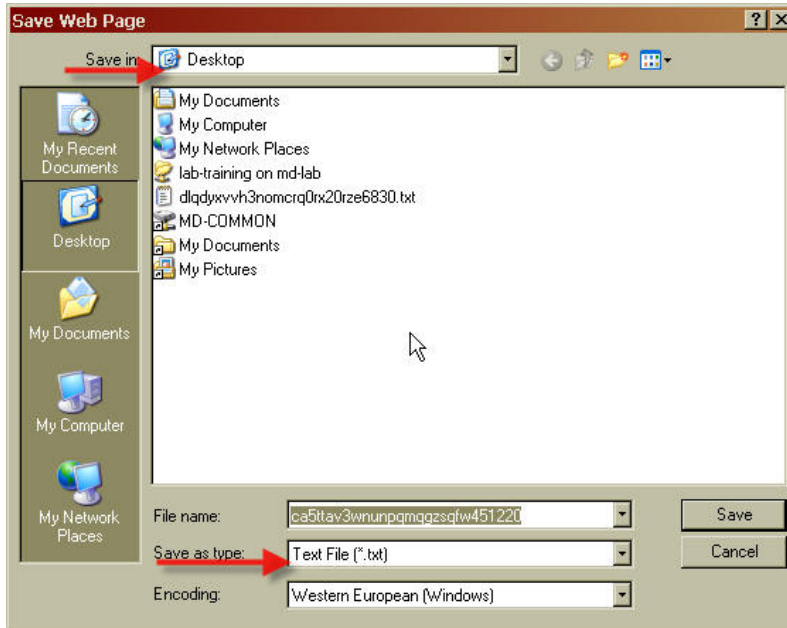


Convert the Progress Book data file to Excel Format

1. Run "Extract Data for Letter" from PB Home, Tools menu.

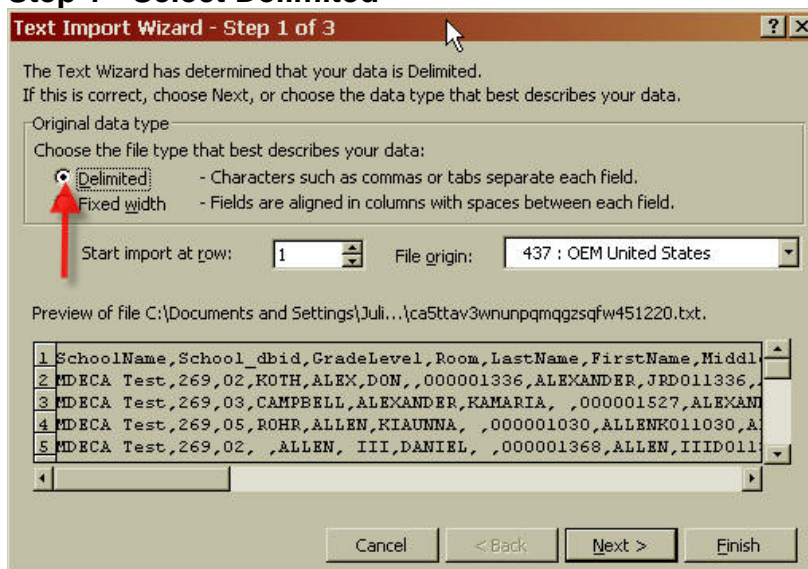


2. Complete the prompts that will generate a comma delimited data file for a district, school building or teacher. Once the file has been created, on the browser tool bar click File, then Save AS
3. The SAVE Web Page window opens. In the SAVE IN box select the folder to save the data file to (recommend DESKTOP or MY DOCUMENTS), and rename the file (optional). Make sure that the file extension remains ".TXT"



4. Open Excel. Click FILE, then OPEN on the toolbar.
5. From the Open window select the folder where the .txt file is saved (look in DESKTOP or MY DOCUMENTS). Select "All Files" in the *Files of type* window at the bottom of the screen. From the list of filenames, click the .txt file and click Open. Or double-click on the filename.
6. The Text Import Wizard window opens. Follow the Text Wizard step-by-step instruction screens.

Step 1 - Select Delimited



Step 2 - Select Comma

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab Semicolon Comma Treat consecutive delimiters as one

Space Other: Text qualifier:

Data preview

SchoolName	School_dbid	GradeLevel	Room	LastName	FirstName	Mi
MDECA Test	269	02	KOTH	ALEX	DON	
MDECA Test	269	03	CAMPBELL	ALEXANDER	KAMARIA	
MDECA Test	269	05	ROHR	ALLEN	KIAUNNA	
MDECA Test	269	02		ALLEN	III	DA

Cancel < Back Next > Finish

Step 3 - Select General data format, then Finish

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Column data format

General Text Date: MDY Do not import column (skip)

Data preview

General	General	General	General	General	General	General
SchoolName	School_dbid	GradeLevel	Room	LastName	FirstName	Mi
MDECA Test	269	02	KOTH	ALEX	DON	
MDECA Test	269	03	CAMPBELL	ALEXANDER	KAMARIA	
MDECA Test	269	05	ROHR	ALLEN	KIAUNNA	
MDECA Test	269	02		ALLEN	III	DA

Cancel < Back Next > Finish

The PB data file has been converted to an EXCEL file so it can be merged with a Parent Letter form or labels. Save and Rename (optional) the Excel file to the DESKTOP.

Ready for Mail Merge.

