

**Topic: SpEdDoc Export to Transfer on a Network**  
**More Info: *SpEdDoc 10 Administration* (SpEdDoc.org)**  
**Audience: SpEdDoc Managers**  
**Date: August 20, 2011**



Exchanging SpEdDoc records using the Transfer process saves many hours of work re-entering student data. Use this Transfer quick guide while connected to SpEdDoc on a server with FileMaker Pro installed on your local computer. If you do not have FileMaker Pro on your computer and instead connect with Terminal Services (Remote Desktop Client), see special instructions in the *SpEdDoc 10 Administration* guide. If exporting from a DB other than your live SpEdDoc (e.g., a backup copy), first put all the files (two SpEdDoc files and Transfer) in a single folder.

- Extract the current version of the Transfer file from Begin > Admin > Advanced Options > Transfer File and put it in a folder precisely named *SpEdDoc Folder*. The *SpEdDoc Folder* must be located at the root level of the hard drive (C: drive for PC or Macintosh HD for Mac).
- Launch SpEdDoc with the *cm* or *manage* account and then enter the SU PW or School PW or User Code with access to all the students to be exported.
- Go to Student > Main Menu and select the *Export to* button (on the bottom right).
- The *Export to Transfer* screen shows a list of the student records to be exported. Click the Find button to select a student or create a custom group of students.
- If any old records in the Transfer file are listed on the right under Current Transfer File Records, click the *Delete Transfer Records* button to clear the file.
- The *exporting for new case manager* box is checked by default. This removes the identity of the old CM so that the new CM's identity will be attached when the data is imported (failure to do this results in data inaccessibility for the new SU).
- Click the *Export to* button to export the selected students to the Transfer file.
- When done, click OK and review the list of student records in the Transfer file.
- Click the *Save a Copy* button to put a copy of Transfer file on your desktop.
- Send a copy of the Transfer file on your desktop to the person who will import the data into their SpEdDoc.
- Let them know if you compress the file (e.g., zip) so that they will know to decompress it.
- Clear the Transfer file that remains on your computer using the *Delete All Records* button on the Transfer screen (see image). This ensures that you don't re-import or resend this data at a later date.
- Note that records can only exported once to a Transfer file from the Wild Branch Host. Either extract a new Transfer file each time from Begin > Admin > Advanced Options > Transfer File, or keep an original Transfer file on your computer in a folder with a name such as *SpEdDoc 10.0 Original Transfer File* and put a fresh copy of that file in the SpEdDoc Folder whenever exporting (you'll still need to extract a fresh Transfer file when SpEdDoc is updated).

