

Please check <http://www.discoverysoftware.com/sis/genesis.php> for an updated Discovery Data Extractor for Genesis User's Guide before printing. This will save you time, as we will be improving the guide based on feedback.



Discovery Data Extractor for Genesis Version 1.0
Installation and User Guide

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Overview

This guide walks you through the process of exporting data from Genesis into a format that is use-able by Connect and/or the Data Transporter. The exported data must be saved into a folder that Connect and/or the Data Transporter can access.

Occasionally school and district will have different setups for their School Information System. This guide will provide steps to set up the bridge for the general case. If your setup differs from this guide and you are unable to set up the bridge, please consult your IT department for assistance. If you are still having difficulties, please contact Discovery Support at: support@discoverysoftware.com.

Common Terms

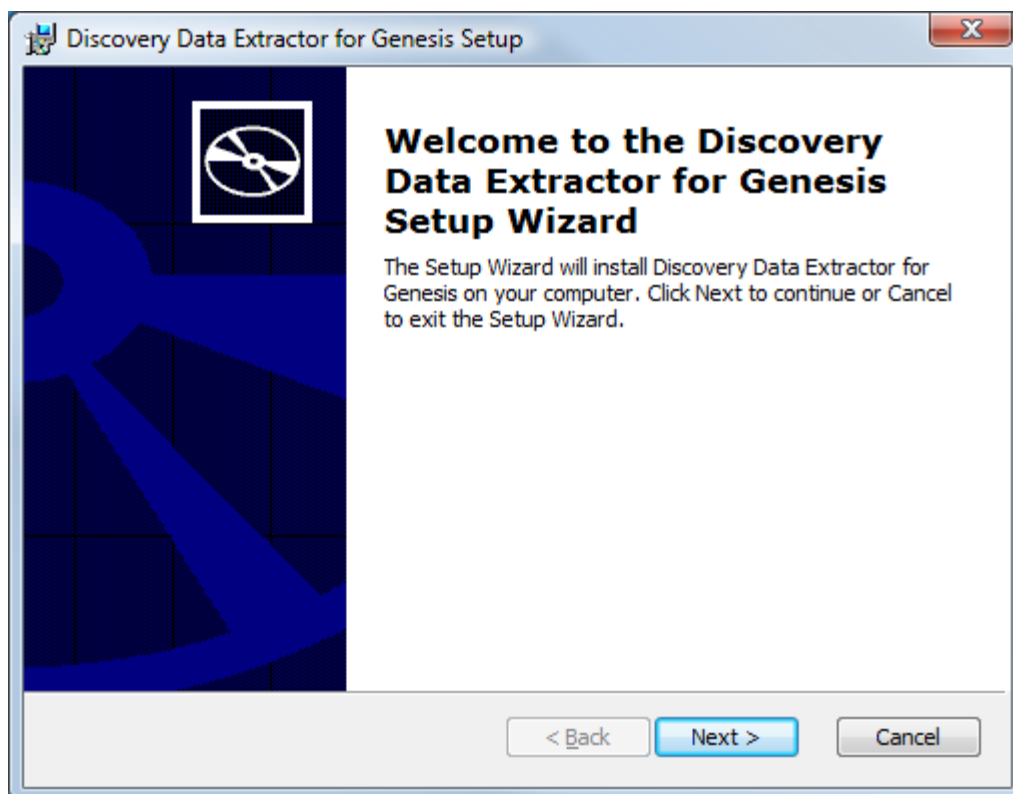
Below you will find definitions for some common terms used within this document:

Connect	Connect is the main program used to access the data created by the Bridge. Connect generally contains a Data Transporter as one of its parts, and uses this Data Transporter to deliver the extracted data to the application that needs it. e.g. Principalm Connect, One Call Connect.
Data Transporter	The Data Transporter is a separate program used to transport the data exported by the Bridge into the program which needs to access this data. e.g. Intgrade Preview.
Bridge	Acts as a bridge between your school's SIS and Connect or the Data Transporter. e.g. data extractor, manual extract, report reader.
ODBC	Stands for Open Database Connectivity. This is a method of accessing a database from an application.
DSN	Data Source Name. This is the name of a specific ODBC Data Source.

Chapter 1 – Preparing the Connection to Genesis

Notes on Installation:

When installing the Data Extractor, on the final screen of the installation program there are two check boxes:



Follow the on-screen instructions for the driver installation before continuing on to the next section.

If you encounter problems installing please contact Discovery Support at: support@discoverysoftware.com

Setting up a Data (ODBC) Connection

Data extraction from Genesis requires an ODBC DSN that has read access to the Genesis database. Typically you will already have an ODBC connection to Genesis for use with other programs such as: Crystal Reports, or COGNOS. If you already have an ODBC DSN set up on your machine, you may continue to the next step. Otherwise you will need to follow the directions for [Setting Up an ODBC DSN for Genesis](#).

Configuring an Account In Genesis

When Genesis is installed there is a default ODBC Connection set up to the Oracle Database. This Connection is typically labeled “Genesis”. We have found that while this ODBC Connection works in most cases, there have been instances where some of the data cannot be read. In these instances we suggest adding a Microsoft Oracle ODBC Driver if available, and the Oracle Driver if not.

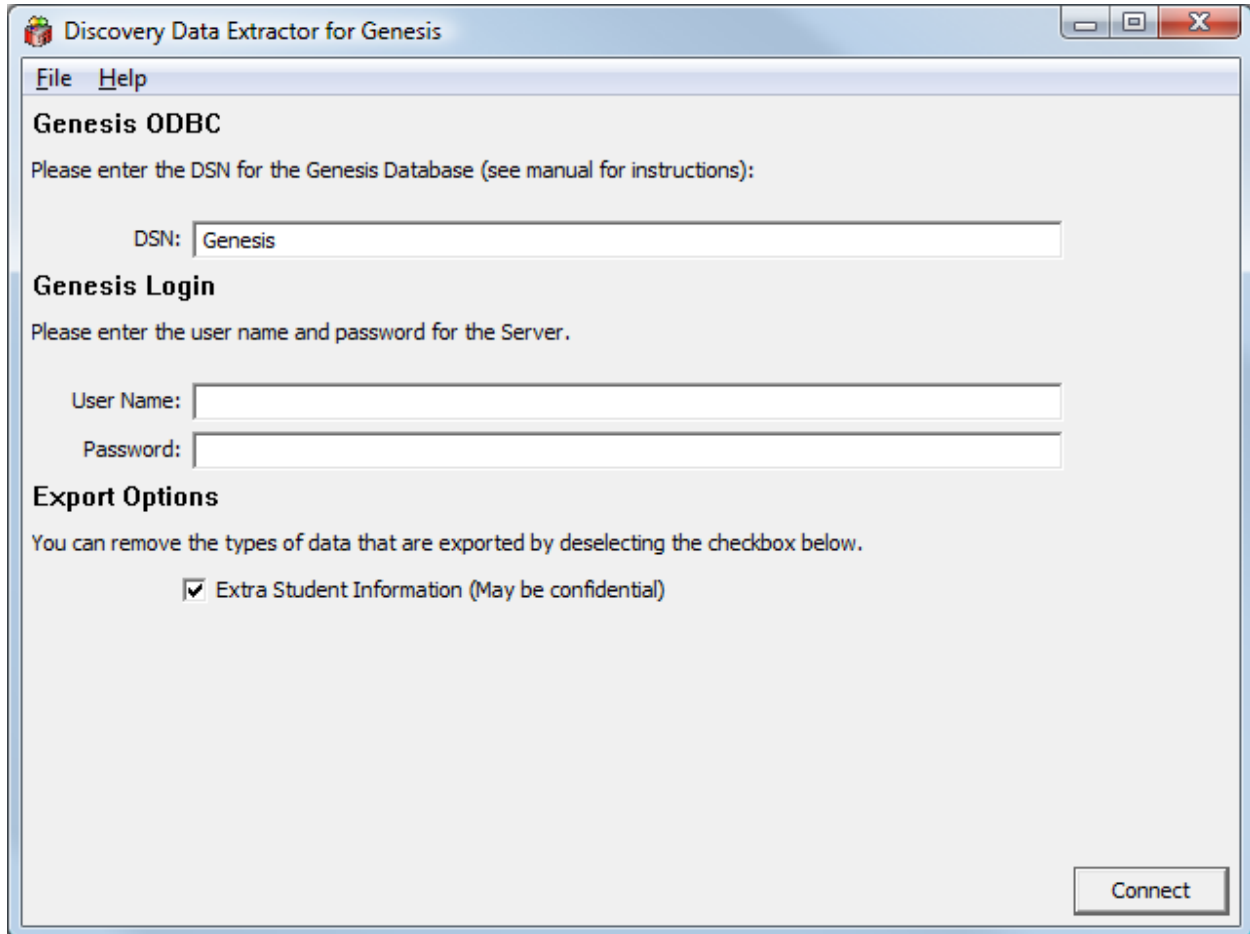
Chapter 1.1 – Setting up the Extractor Using the User Interface

Connecting to Genesis

If the Discovery Data Extractor for Genesis is not already running, run it by choosing **Start->Programs->Principalm->Genesis ->Discovery Data Extractor**.

When first run, the Extractor requests a connection to Genesis using this window:

Fig. 1:



The screenshot shows a Windows-style dialog box titled "Discovery Data Extractor for Genesis". It has a menu bar with "File" and "Help". The dialog is divided into three sections: "Genesis ODBC", "Genesis Login", and "Export Options".

- Genesis ODBC:** A label "Please enter the DSN for the Genesis Database (see manual for instructions):" is followed by a text input field containing "Genesis".
- Genesis Login:** A label "Please enter the user name and password for the Server." is followed by two text input fields: "User Name:" and "Password:".
- Export Options:** A label "You can remove the types of data that are exported by deselecting the checkbox below." is followed by a checked checkbox labeled "Extra Student Information (May be confidential)".

A "Connect" button is located in the bottom right corner of the dialog.

You can return to this window at any time by using the **File->Edit Genesis Connection...** menu option.

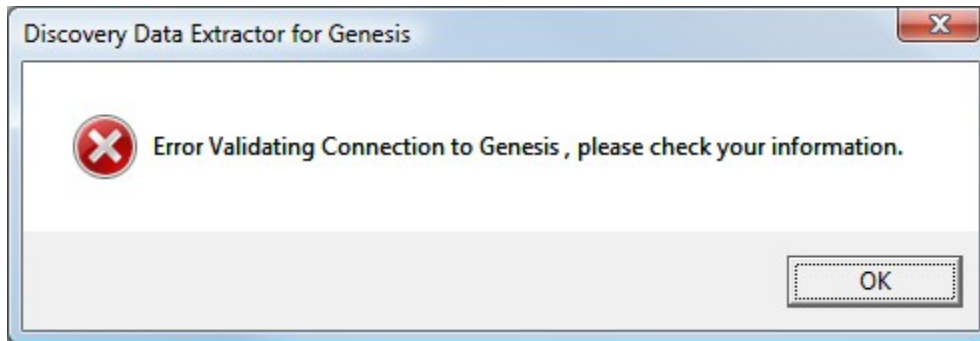
Fill in the fields as follows:

1. **DSN** – enter the name of the ODBC DSN you set up in Chapter 1. If you have multiple schools just choose one of them for this DSN. (This can also be modified on the Extract View, if you need to change it on a per school basis)
2. **Genesis Login** – Fill in the User Name and Password that matches the ODBC DSN (You will have entered this information while setting up the DSN). This is typically NOT your Genesis login.

3. **Export Options** – Genesis allows you to include or exclude Extra Student Information from the extract. See [Export Options](#) for more information on how this option is used.

4. Press **Connect**.

If the connection is successful, you will be taken to the school view. If it does not succeed, you will be prompted with a warning box:



this indicates that there was a problem connecting.

Troubleshooting tips:

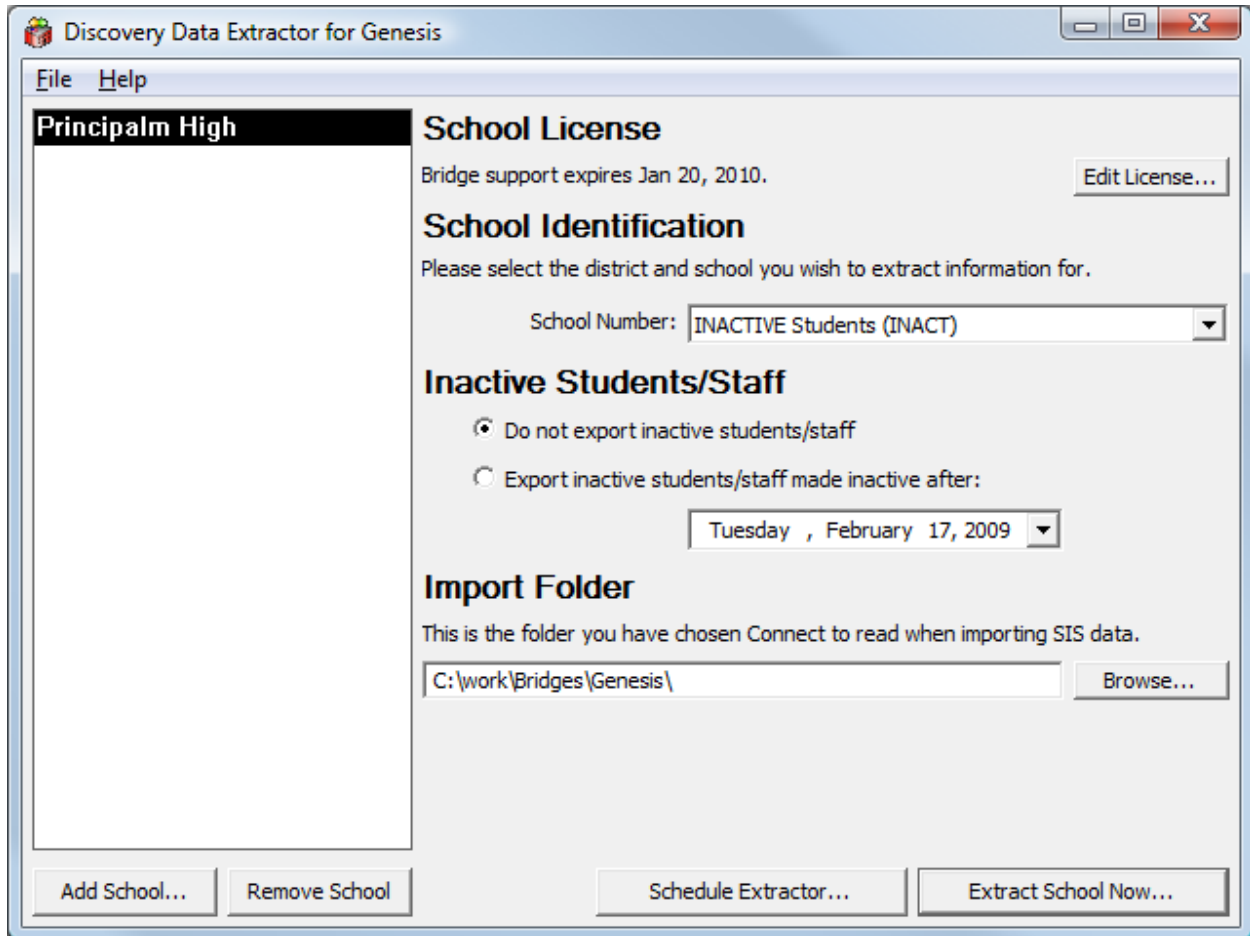
If you encounter a problem connecting here are a few possible reasons/solutions:

- Check to make sure there are no spelling mistakes in the ODBC DSN, remove any surrounding spaces.
- Make sure you set up the ODBC DSN correctly, and Tested the connection in the ODBC wizard.
- If you are still have any questions please contact Discovery Support at: support@discoverysoftware.com.

Setting Up a School

After you configure your Genesis connection successfully, you are taken to the school list view:

Fig. 2:



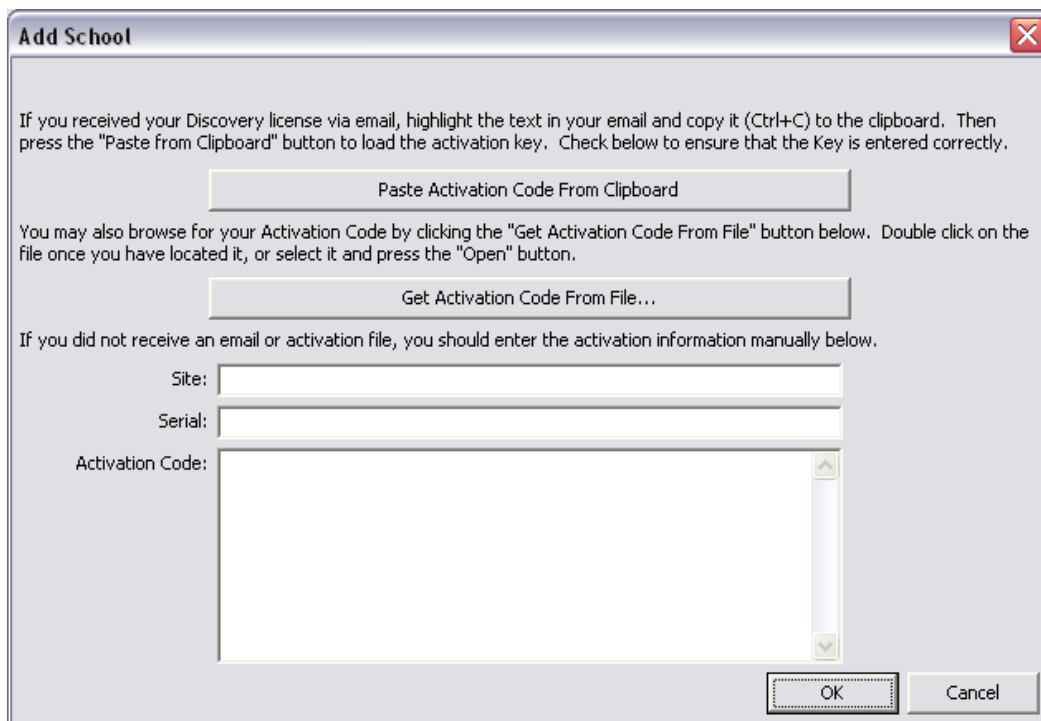
The school list view may not have any schools listed on the left side of the screen. If this is the case, you just need to [Add a School](#). Once you have added the school then move on to [Configuring a School for Export](#).

Add a School

To enter a school:

1. Click the **Add School...** button in the lower left corner of the screen. The **Edit School License** dialog appears:

Fig. 2:



2. Enter your Discovery license key by copying the text of your license from the email you received and clicking **“Paste Activation From Clipboard.”** Alternatively, you can click **“Get Activation Code From File”** to browse for the .paf file that you received from Discovery Software (it may be on your desktop).
3. Click OK. You will be returned to the school list view (Fig 2.), and now the newly licensed school will appear in the school list view to the left.
4. Follow the steps in “Configuring a School for Export” to complete the school setup.

Configuring a School for Export

To configure a school for export:

1. Under **“School Identification”**:
 - Select the district number for your school from the **School District** drop-down.
 - Select the school number of your school from the **Genesis School** drop-down.
 - Select the school year of the current school year from the **School Year** drop-down. Previous years can be exported, but validity of information may not be correct.

2. Under “**Inactive Students/Staff**”, choose whether to export inactive students and staff members. Click on the radio button of your choice.
3. Under “**Import Folder**”, enter the folder that you have chosen to place this school’s export files in. If this setting was already made in Connect, and Connect is on the same machine, this will already be filled in for you.

Once you have all of these configurations set you are ready to test the Extract to make sure everything is set up and working correctly.

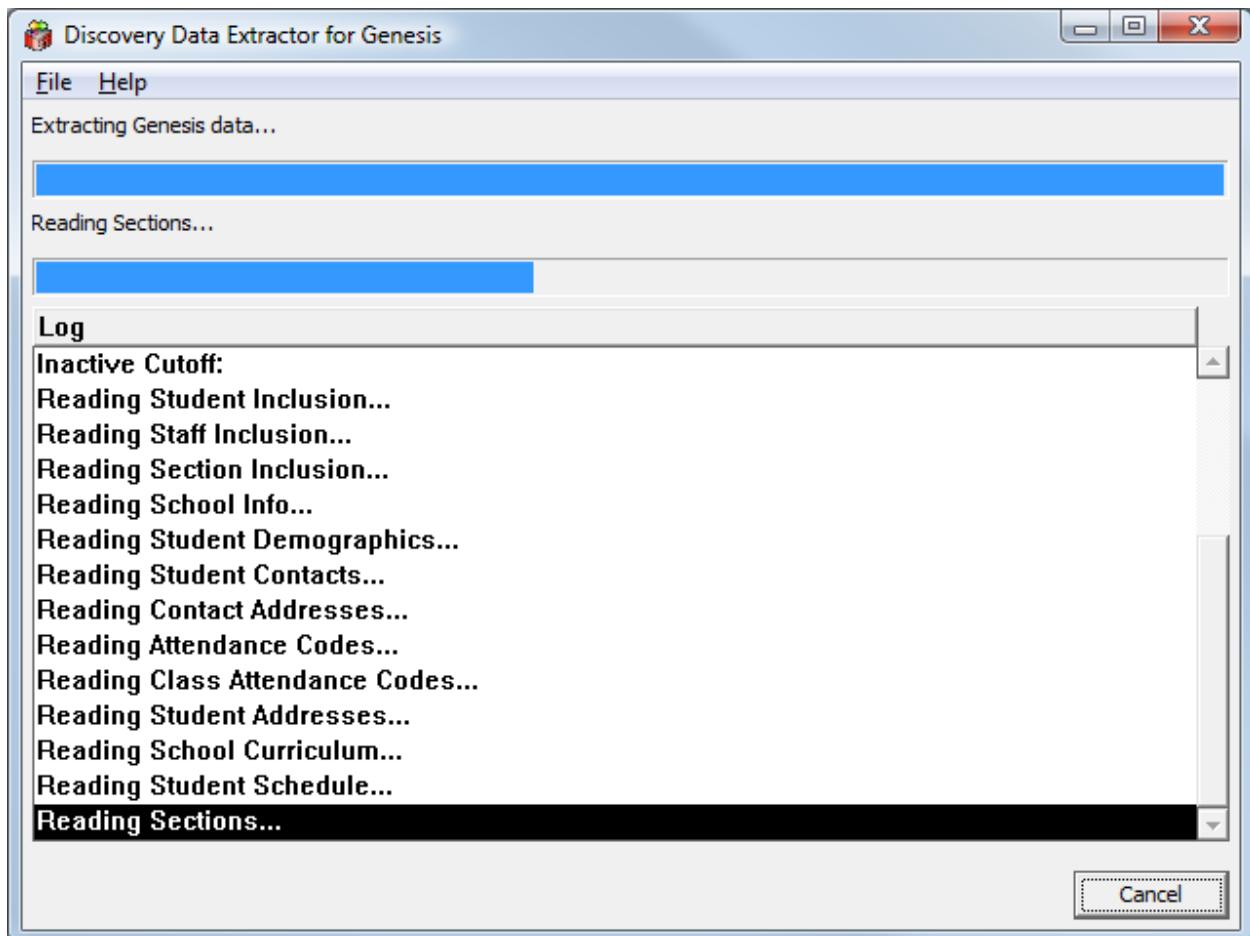
Testing the Extraction

Once you have configured a school using the above process you will want to test the extraction to make sure everything works.

Click “**Extract School Now.**” The extraction progress view will appear (see Fig. 4).

Click “**Cancel**” to stop the extraction at any time.

Fig 4.



Once the extraction is complete, click “**OK.**” You will be returned to the screen in Fig. 2, at which point you can add another school if you wish.

This should mean that your school is configured correctly. Repeat this process for each of the schools in your district.

Note: You may receive some messages similar to:

Table <table name> does not exist

Typically these are just informational messages. If you notice some information is missing from your export, please contact our support department and we can help track down the problem.

Removing a School

To remove a school:

1. Click the school name in the list of schools to highlight it.
2. Click the **Remove School** button. The school is removed.

Chapter 2 – Manual Extraction

This section describes the process for manually transferring data from Genesis to the Data Transporter or Connect. If you wish to schedule the export process, please refer to [Chapter 3 - Scheduling the Extractor](#)

Manual transfer of data from Genesis to the Data Transporter or Connect, involves two steps:

- Extracting data from Genesis
- Importing the data using Connect

Extracting Data from Genesis

To extract data from Genesis, follow these steps:

1. From the **Start** menu choose **Programs->Principalm->Genesis ->Discovery Data Extractor**. This launches the **Discovery Data Extractor for Genesis**.
2. Select the school you wish to extract from the school list view.
3. Click the **Extract School Now...** button. The extraction progress view will appear.
4. Click **Cancel** to stop the extraction at any time.
5. Once the extraction is complete, click **OK** to return to the school list view.

Import Data using the Data Transporter or Connect

Follow the instructions in the correct Data Transporter or Connect User Guide to import the extracted data.

Exporting Photos Through Genesis

Genesis Data Extractor does not currently support extraction of photos directly from the Genesis database.

The extractor uses the following Genesis fields to link students to their photos:

“Photos are identified by” setting in Connect	Genesis table and field name
Student Number	STUDENTS.STUDENT_ID
State ID	Not in Genesis
Photo ID	Not in Genesis
SSN	Not supported

The extractor uses the following Genesis fields to link staff to their photos:

“Photos are identified by” setting in Connect	Genesis table and field name
Staff Number	DISTRICT_TEACHERS. TEACHER_ID
State ID	Not in Genesis
Photo ID	Not in Genesis
SSN	Not supported

The photos must be in .jpg format and the value found in the Genesis table/field should be the file name (or the value should be referenced using a mapping file). See the Connect User Guide for more information about exporting photos.

Chapter 3 - Scheduling the Extractor

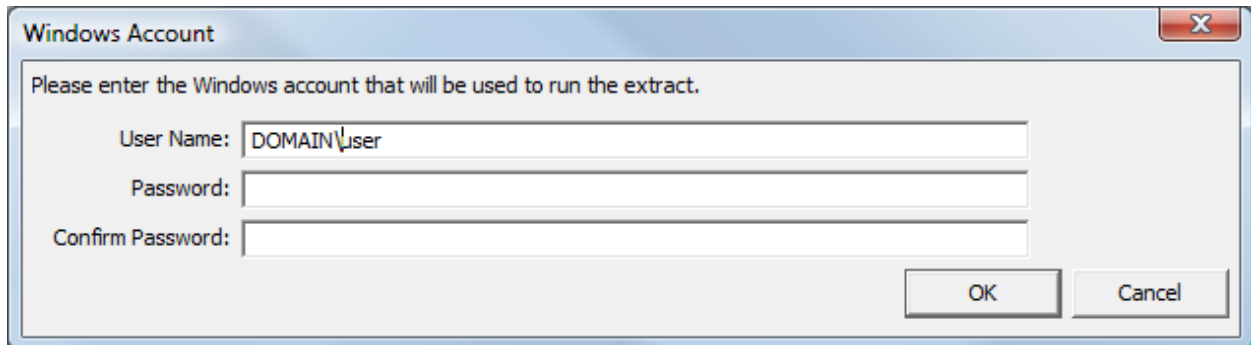
The Extractor can be scheduled by selecting:

- The **Schedule Extractor** feature inside the Data Extractor: This creates a district wide task for all schools listed in the user interface, to run each night at 1:00 AM. Attendance extracts are also included in the task, but can be modified to run at separate times if needed.
- If you need to modify existing Scheduled Extracts see “Modifying Scheduled Tasks” below.

Schedule Data Extracts Using the Schedule Extractor Feature

The **Schedule Extractor** feature creates a task in Windows’ **Scheduled Tasks** that runs weekly, and can be further edited and customized just like any other Windows task (see “Using Windows Scheduled Tasks” for details). To use the Schedule feature from inside the Discovery Data Extractor for Genesis:

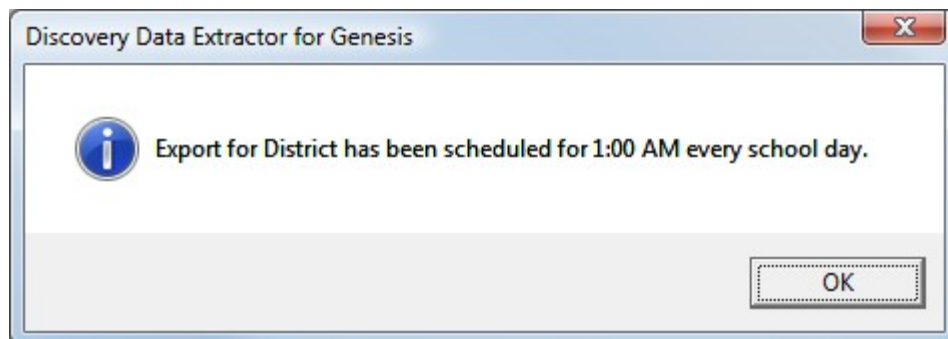
1. Run Discovery Data Extractor for Genesis.
2. Click “**Schedule Extractor**”.
3. Enter your Windows account information in the window that appears:



The screenshot shows a dialog box titled "Windows Account". The text inside reads: "Please enter the Windows account that will be used to run the extract." There are three input fields: "User Name:" with the text "DOMAIN\user", "Password:", and "Confirm Password:". At the bottom right, there are two buttons: "OK" and "Cancel".

Note: Be careful when entering account information – Windows does not verify the information until the task is run. If there is a mistake the task will not run, and may not notify you that it has not run.

4. Click OK in the Windows Account window. After a few seconds, you will receive a message indicating that the task was created:



5. To view newly created tasks, open **Scheduled Tasks**, click **Start** → **Programs** → **Accessories** → **System Tools** → **Scheduled Tasks**. The task will be labeled **Discovery Genesis District Extract**. You can double-click the task to modify it further if you desire.

Troubleshooting Tips: If your task is **not** running on schedule, open the **Scheduled Tasks** window and scroll to the right. If the Status column indicates that the account information is wrong, you will need to re-enter it on the **Task** pane inside the **Scheduled Task** property window.

You may need to ensure that the Windows user account has sufficient rights to run this task.

Important scheduling notes:

Be sure to leave the computer you use to schedule tasks on and logged in to ensure the scheduled tasks are run. You may wish to discuss this with your IT department to ensure this complies with your computer-use policies.

If the data extractor encounters any errors while extracting during a scheduled task, an error log may open up in a text editor. If you notice an error log, check the last few entries in the log file for more information. If you cannot determine the cause please contact Discovery Support – support@discoverysoftware.com for further assistance.

Modifying Scheduled Tasks

The “Schedule Extractor” feature will schedule all of the schools that you have currently set up in the Data Extractor. Only one scheduled task is created. This task runs a batch file, which runs each school extraction separately, and in order.

The batch file that is scheduled to run can be found:

WindowsXP/2000:

C:\Documents and Settings\[user]\Application Data\Principalm\Genesis\DistrictScheduling.bat

Windows Vista:

C:\Users\[user]\AppData\Roaming\Principalm\Genesis\DistrictScheduling.bat

Where [user] is your windows user name.

This batch file is a text file that contains the command line code for running the program. See [Appendix C – Advanced Setup](#) for more information on how to modify this code.

Canceling Scheduled Tasks

1. Click **Start** > **Programs (or All Programs)** > **Accessories** > **System Tools** > **Scheduled Tasks**.
2. Right-click the task you wish to cancel.
3. Click “**Delete**.”
4. Click “**Yes**” to confirm cancellation.

Chapter 4 – Customizing Export

What Can I Customize?

As we receive user feedback on fields that they wish to add we will continue to expand the Discovery Data Extractor for Genesis. If you have suggestions on fields that exist in Genesis that you would like to see added to the Data Extractor; or any other features, please do not hesitate to contact us at support@discoverysoftware.com.

Export Options

On the Connection View screen, you can modify which Export Options are filtered. In Genesis you are able to filter out these options:

- Extra Student Information – If this option is included (checked) the Genesis data extractor will include all Extra Student Information.
- This extra information are fields from the STUDENTS table in the database, that may not be as useful to some users.

Chapter 5 – Uninstall

To uninstall the Discovery Data Extractor for Genesis from your system, follow these steps:

1. Click **Start > Control Panel > Add/Remove Programs**.
2. Select **“Discovery Data Extractor for Genesis.”**
3. Click **“Remove”** to uninstall the program.

Appendix A – Adding a Genesis ODBC Connection: Oracle Driver

Your installation of Genesis should use an Oracle database, this section will help you set up an ODBC DSN. This ODBC Connection may already be set up.

To check for an existing ODBC DSN:

1. Open the Windows **Data Sources (ODBC)** control panel:
 - a. From the **Start** menu, choose **Control Panel**.
 - b. On Windows 2000/XP, open the **Administrative Tools** folder.
 - c. Double-click the **Data Sources (ODBC)** icon.
2. On the **User DSN** or **System DSN** tab, in the **User Data Sources** or **System Data Sources** list, check for an entry that matches your school's database, most likely named "Genesis".
3. Note the name of the DSN if you found one, this is the same name that you will enter in the **DSN** field in the Discovery Data Extractor later.

If you have no ODBC DSN entries matching your school, please follow these steps to add an ODBC DSN for Genesis.

Setting up a Genesis Oracle ODBC DSN

If you do not have a Genesis ODBC DSN follow these steps.

- Open the Windows **Data Sources (ODBC)** control panel:

On Windows 32-bit:

From the **Start** menu, choose **Control Panel**.

On Windows 2000/XP, open the **Administrative Tools** folder.

Double-click the **Data Sources (ODBC)** icon.

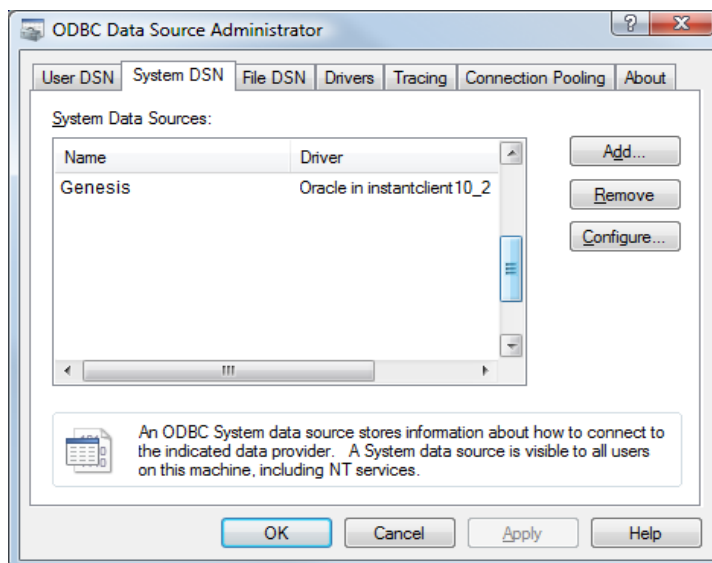
On Windows 64-bit:

From the **Start** menu, choose **Run**.

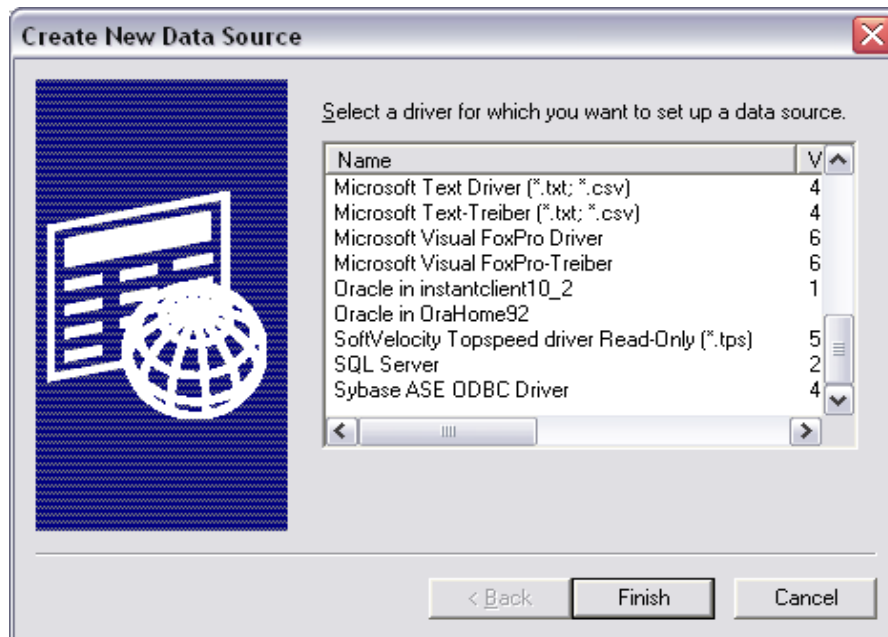
Type in: `C:\WINDOWS\SysWOW64\odbcad32.exe`

Click OK

- This will open up the Data Source Administrator.



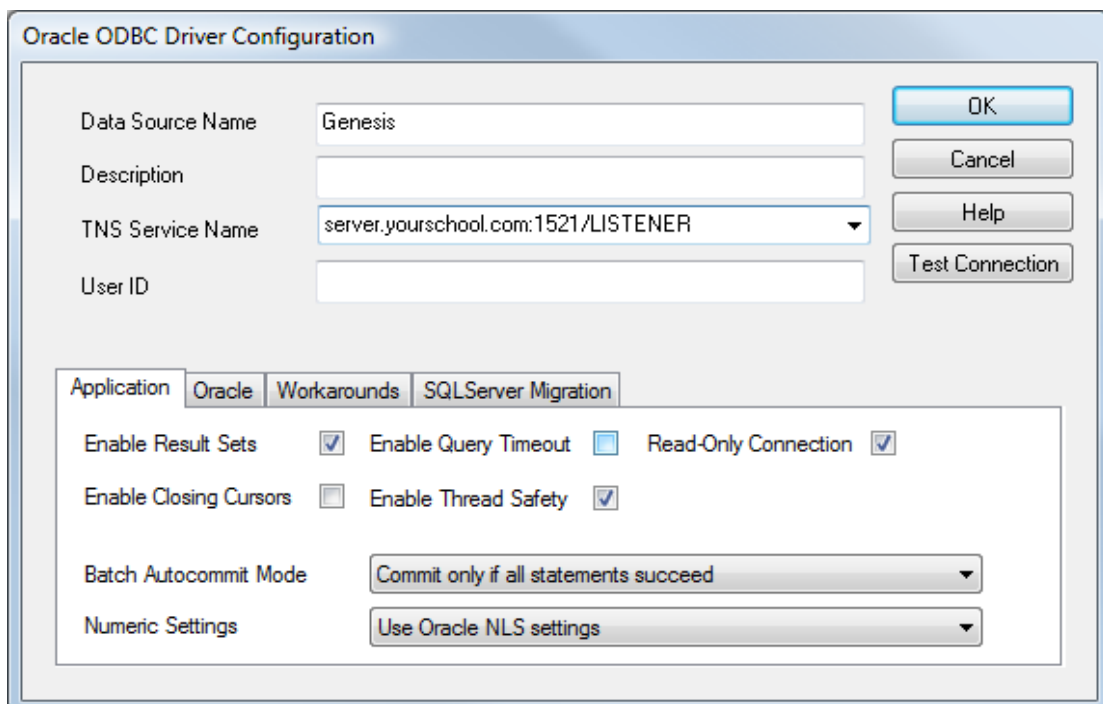
- On the **System DSN** tab, click the **Add...** button.



- Choose **Oracle in instantclient 10_2** from the list of drivers that appears, and click **Finish**. (Your Oracle driver may be different than this one, as long as the driver is from Oracle Corporation and is compatible with the Database Server version it should be fine)

If the Oracle Driver does not exist, see [Oracle Driver Installation](#) for instructions on how to install the driver.

- This will bring up the Oracle ODBC Driver Configuration page:



- Enter a Data Source Name, this can be anything, but you will need to use this name in the Data Extractor once you are finished; eg. **Genesis**.
- For TNS Service Name this will be the TNS Service as determined by your Genesis install. Your Oracle DBA or Genesis administrator should know this information. It is in this format:

[server address]:[port]/[Listener]

as per the example above.

The **[server address]** is the ipaddress of your Genesis server.

The **[port]** should be the port oracle is open to listen on.

The **[Listener]** is the name of the Oracle Listener.

All of these settings should be defaults when you set up the Genesis server, your school may have changed these values during installation. If you are having trouble finding out these values, they can be found in the serverconfig.props file on the Oracle server.

- User ID: This should be a user account that has read access to the DB. This will most likely not be the user account that you log in to Genesis with. Your Genesis Administrator should know this information.
- Click **Test Connection**.
- Enter the password for the account. Your Genesis DBA should maintain the password for this account.
- Click **OK**.
- You should receive “Connection Successful”. If not please check our Knowledge Base for possible solutions, or check your Genesis Manual for more information on how to set up this driver.
- Click **OK**.
- Click **OK** again to exit the ODBC Data Source Administrator.

Your Data Source is now set up and ready to be used by the Data Extractor.

Oracle Driver Installation

Note: This is a fairly technical install. Your Oracle DBA or someone familiar with your Oracle set up should perform these steps.

Oracle Instant Client software is available via download at:

<http://www.oracle.com/technology/software/tech/oci/instantclient/index.html>

Note: An Oracle account is required in order to download the software. The account is free and does not require Genesis license information.

From the Oracle Instant Client Downloads page:

- Click on:
- [Instant Client for Microsoft Windows \(32-bit\)](#) (Windows XP, Vista 32 bit)
 - If you are using Vista 64 bit or Server 2008 (64 bit) you will still need to choose the 32-bit client.
 - a. You may need to log on to the Oracle site at this point.
 - b. Accept the user license agreement.
- Under Version 10.2.0.4:
- Download **Instant Client Package – (Basic or Basic Lite)**
- Download **Instant Client Package – ODBC**

- These two files are zip archives. You will need to extract them to your computer. Extract them into the same folder: eg. C:\Oracle\InstantClient\

There is a help document in this folder in case you need more help: ODBC_IC_Readme_Win.html.

- Add this location to your PATH environment variable:
 - Start->Settings->Control Panel->System
 - **Advanced** Tab.
 - Environment Variables
 - Under System Variables find a variable called **PATH** or **Path**.
 - Select it, and click Edit.
 - In the Variable value add the path of the Instant Client Package to the current value, separated by semi-colons. eg. You may add this string if this was your saved location from step 6 above:
 ;C:\Oracle\InstantClient\instantclient_10_2
- Double click on the **odbc_install.exe** file in the Instant Client folder.
- Your Oracle Drivers should be installed.

If you have trouble with this installation, please consult your Genesis Documentation or Oracle's website for more information.

Appendix B – Help Logs (Advanced)

There are some logs generated by the Data Extractor. If you have a support issue, these logs will be very helpful for our support department. They contain no sensitive information.

You can access these logs by following the steps below:

GenesisExtractLog.txt

This file is only created once you have begun the Extraction. It is located in the **Import Folder** you set up when configuring your school. You can open this file with any text editor program.

GenesisRunLog.txt

This file is located in different areas depending on your Operating System:

WindowsXP/2000: located at: *C:\Documents and Settings\[user]\Application Data\Principalm\Genesis\GenesisRunLog.txt.*

Windows Vista: located at: *C:\Users\[user]\AppData\Roaming\Principalm\Genesis\GenesisRunLog.txt.*

Replace **[user]** with your Windows user name.

If there was an error or you have closed the Data Extractor, this file will also be located in the **Import Folder**.

Appendix C – Advanced Setup

This section is intended for advanced users. If you do not understand command line processing, please contact your IT department or follow the set up method described in [Chapter 1.1 – Setting up the Extractor Using the User Interface](#).

We now allow command line functionality to set up single and multiple extractions without using the User Interface.

This is very useful for Districts as it allows you to set up multiple schools in a short amount of time.

It is suggested that you set up the extractor once using the User Interface to ensure that the extraction works correctly.

Command Line Quick Start

Use the following command as a guide to set up and run your Data Extractor quickly.

```
[Path to PPSchoolMAX.exe]\PPSchoolMAX.exe -d"[DSN Name]" -u[username] -w[password] -c[district number] -n[school number] -i"[inactivedate]" -l"[path to license file]" -p"[importpath]" -a"ad"
```

[Path to PPSchoolMAX.exe] is the full path to the location of the executable file, PPSchoolMAX.exe.

[DSN Name]	is the name of the ODBC connection that you set up in Chapter 1.
[username]	is the username for the ODBC connection that you set up in Chapter 1.
[password]	is the password for the ODBC connection that you set up in Chapter 1.
[districtnumber]	is the district number of the school you wish to export.
[schoolnumber]	is the school or building number of the school you wish to export.
[schoolyear]	is the current school year.
[inactivedate]	supply this value if you wish to import inactive staff and students. Any students/staff made inactive after this date will be included in the import. Do not use the -i flag if you do not want inactive staff/students. This value should be in the format YYYYMMDD.
[path to license file]	is the full path to the .paf file
[import path]	is the path of the import directory, where you wish the files to go.

If you do not understand any of the above parameters, please see the [Parameters Section](#) below.

Command Line Usage

The Genesis Data Extractor can be run on the command line, or through a batch file.

This is accomplished the following ways:

Command Line:

First you need to locate the executable.

It will generally be located in the following location unless you changed the destination directory during installation:

```
"C:\Program Files\Discovery Software\Principalm\PPSchoolMAX\PPSchoolMAX.exe"
```

You can run this directly in Windows by choosing Start->Run:

And typing in the following:

```
C:\Program Files\Discovery Software\Principalm\Genesis\PPSchoolMAX.exe  
<parameters>
```

Where <parameters> should be replaced by the required parameters listed in the

[Parameters Section](#).

Batch File:

A Batch file works in very much the same way as the command line above.

First on your desktop right click and choose New->Text Document.

This will create a text document on your desktop, normally called "New Text Document.txt"

Next double click on this file to open it for editing.

Type the following line:

```
C:\Program Files\Discovery  
Software\Principalm\PPSchoolMAX\PPSchoolMAX.exe <parameters>
```

Where <parameters> should be replaced by the required parameters listed in the Parameters Section.

Save the file as Genesis.bat and close the program you are editing it in (typically Notepad).

Notes on Use

The Data Extractor works on a per license basis; this means that you need one license (.paf file) for every school that will be using the Data Extractor. Connect shares this license, so if you are importing Data for one school you only need one license.

Appendix D – Parameters

Running the Discovery Data Extractor from the command line is very simple once you understand what elements are required.

- User Name:** -u The user name refers to the user name for the database to which you wish to connect. This user must have the appropriate permissions in order to view data within that database. This user name will be the same as the User ID as entered in the ODBC Connection. This is a required field.
- Password:** -w The password is the same password associated with the user name for the database to which you wish to connect. This password will be the same as the password supplied in the ODBC Connection. This is a required field (unless -z is used).
- Password:** -z This password field is an encoded password for added security, it can be obtained by running the Schedule Extractor (see [Chapter 3: Scheduling the Extractor](#) for detailed instructions). This is a required field (unless -w is used).
- ODBC DSN:** -d The ODBC DSN Name is the same as supplied as “Data Source Name” in the ODBC Connection. This is a required field. This will typically be Genesis.
- District Number:** -c The District Number is the number of the district for the school you wish to export.
- School Number:** -n The School Number is the number of the school you wish to export.
- School Year:** -y The School Year is the current school year.
- Inactive:** -i The Inactive setting indicates whether or not you want to extract inactive students and teachers. This should be entered as **yes** for all inactive staff and students, or in the format **YYMMDD**.
- School License:** -l The School License is the full path of the licensee file supplied by Discovery Software. This file will be in a .paf format. If you do not have this file, please contact Discovery Software (support@discoverysoftware.com).
- Import Folder:** -p The Import Folder is the location of the folder where you wish to extract the data to. This folder will, in most cases, be the same as the Import Folder that Connect uses. You need to enter the full path name. This folder does not need to exist (the extractor will create it if it does not).
- Export Type:** -a The Export Type flag is used to determine which type of extract you wish to perform. Typically this will be set to da, for Demographics and Attendance.
- a** Attendance: Include Attendance updates in this extract.

- d** Demographics: Include demographic information.
- g** Filter Progress Grades: Do not include Progress grades (to be used in conjunction with d (demographics export) above).

Parameter Code	Description (Matches Label in Extractor Window)	Example	
-d	ODBC DSN Name	-d"Genesis"	
-u	User Name (REQUIRED)	-uadmin	
-w	Password (REQUIRED)	-w"open sesame"	
-z	Password (encoded) – this is the format used by Schedule This... for greater security. You can copy this parameter from a Schedule This entry to your own custom task.	-z"abiel\$@0ls^#D"	
-c	District Number	-c1234	
-y	School Year	-y2008	
-n	School Number	-n123	
-i	Inactive	-i"20060102"	
-l	School License (Full Path)	-l"c:\license.PAF"	
-p	Import Folder	-p"c:\Import Folder"	
-a	<p>SubCode</p> <p>“a” attendance</p> <p>“d” demographics</p> <p>“g” Progress Grades</p>	<p>Export type include the following:</p> <p>“a” for attendance update</p> <p>“d” for demographics</p> <p>“g” add this if you want to filter out Progress Grades</p>	<p>-a"dag"</p> <p>-a"a"</p> <p>-a"d"</p> <p>-a"g"</p>