Discovery Data Extractor for Harmony Version 1.1.2

Installation and User Guide

Revised: February 25th, 2009

# Table of Contents

Chapter 1 – Setting Up the Extractor

By this point you should have already installed the Discovery Data Extractor for Harmony program using the installer that contained these instructions.

Setting Up a Lotus Notes SQL DSN

You will need to configure a Lotus NotesSQL DSN to connect to the database.   If you already have a DSN setup, skip to the next section *Connecting to Harmony*.

To set up a Lotus NotesSQL DSN:

1. Obtain and install the NotesSQL ODBC Driver.

2. Go to the **Control Panel** and choose **Administrative Tools**. Choose **Data Sources (ODBC)** from the list of programs. The ODBC Data Source Administrator appears.

3. If you are the only user of this computer that will be using the Extractor, choose the **User DSN** tab (it will normally already be selected). If others must use the Extractor, or you plan to run scheduled extracts from a different Windows account, choose the **System DSN** tab.

4. Click Add… to add a DSN.

5. From the list of drivers that appears, choose **Lotus NotesSQL Driver** (*.nsf)

6. Click **Finish**. The **Lotus NotesSQL ODBC Setup** screen will appear.

7. For **Data Source Name**, enter a name for the data source. This can be any name you choose.   (eg. Harmony) Remember the name you choose, it is the same name you should enter in the **Harmony DSN** box in the Extractor.
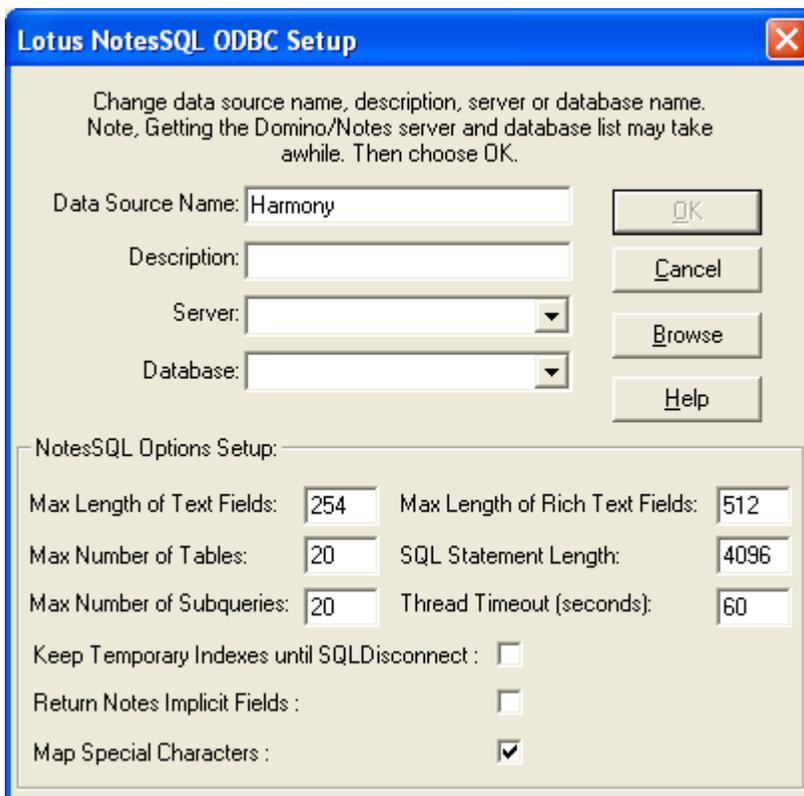
8. Select the Server Name from the Server dropdown.

9. Select the Database Name from the Database dropdown.

10. Click OK

Connecting to Harmony

If the Discovery Data Extractor for Harmony (hereafter "the Extractor") is not already running, run it by choosing **Start->Programs->Principalm->Harmony->Discovery Data Extractor**.

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

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

Fill in the fields as follows:

1. **Harmony DSN** – Enter the name of the Harmony DSN that you have set up for the Extractor to use.

   For instructions on setting up an Harmony DSN, see "Setting Up a Lotus NotesSQL DSN" above.

2. **User Name / Password** – enter the user name and password that you have given access to the views.

3. Press **Connect**. If the connection is successful, you will be taken to the school view. If it does not succeed, you will be prompted to correct the problem encountered.

Setting Up a School

After you configure your Harmony connection successfully, you are taken to the school list view:
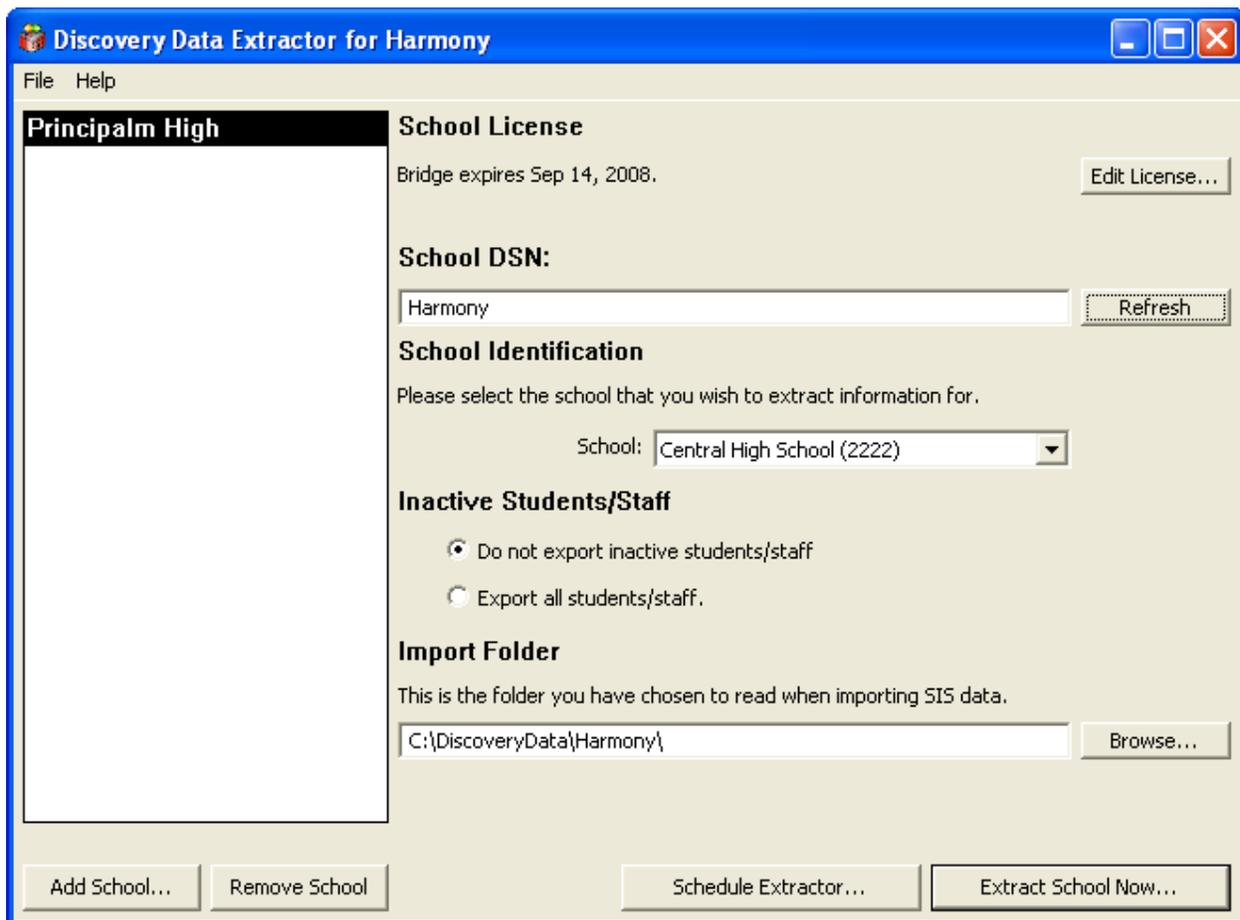
If you are running the Extractor on the same machine that you are using for Connect, your list of schools should contain all of the schools you have set up in Connect. If you are using a different machine, or wish to add additional schools, you will need to enter these schools manually.

Adding 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:
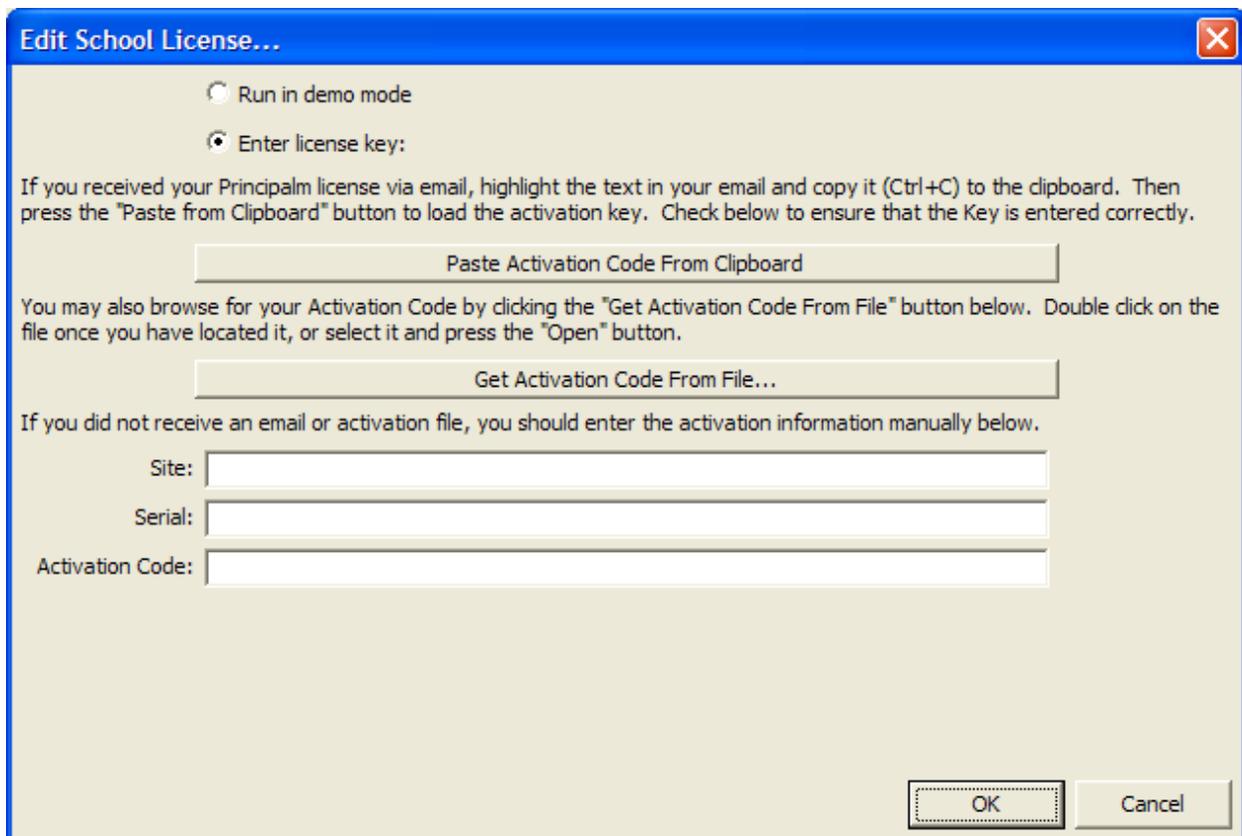
2. Choose **Run in demo mode** if you do not have a license for any Discovery product and wish to try one out. Otherwise choose **Enter license key:** and follow the on-screen instructions for entering the license key.

3. Click **OK**. The school will appear selected in the school list view.

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. Enter the School DSN, if it is different from the default value entered in the Connect view. If you change this value, you will need to click on the "Refresh" button to update the School dropdown.

2. Select the name of the school from the **School** popup.

3. Under **Inactive Students/Staff**, choose whether to export inactive students and staff members.

4. 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.

NOTE: If you change the folder that was set from Connect's data, you must change that setting inside Connect as well.

Photo Export

The Harmony Extractor does not export the photos referenced by Harmony, so you will need to have access to the photo images provided by your photo vendor. Consult the Connect User Guide for more information.

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

"Photos are identified by" setting in Connect	Harmony table and field name
Student Number	Student.ID
State ID	Not supported
Photo ID	Not supported
SSN	No longer supported

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

"Photos are identified by" setting in Connect	Harmony table and field name
Staff Number	Personnel.PersonnelDisplay
State ID	Not supported
Photo ID	Not supported
SSN	No longer supported

The photos must be in jpg format and the value found in the Harmony 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.

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 Harmony to Connect. If you wish to schedule the export process, please refer to the next chapter.

Manual transfer of data from Harmony to Connect involves two steps:

- Extracting data from Harmony

- Importing the data into Connect

Extracting Data from Harmony

To extract data from Harmony into Connect, follow these steps:

1. From the **Start** menu choose **Programs->Principalm->Harmony->Discovery Data Extractor**. This launches the **Discovery Data Extractor for Harmony**.

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, the **Cancel** button changes to an **OK** button. Click **OK** to return to the school list view.

Import Data into Connect

Follow the instructions in the Connect User Guide to import the extracted data.

Chapter 3 - Scheduling the Extractor

The Extractor can be scheduled in two ways. These are:

- The **Schedule This School** feature inside the Extractor – this schedules an extraction of demographic, schedule, and grades information each night at 1:00 AM.

- Windows' **Scheduled Tasks** – this can schedule an export in practically any form you could imagine. You can also customize tasks created by the **Schedule This** feature in this manner.

Using the Schedule This School Feature

The **Schedule This School** 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 Extractor:

1. Run the Extractor.

2. Select the school you wish to schedule from the school list view.

3. Click the **Schedule This School…** button at the bottom of the window.

4. Enter your Windows account information in the window that appears:
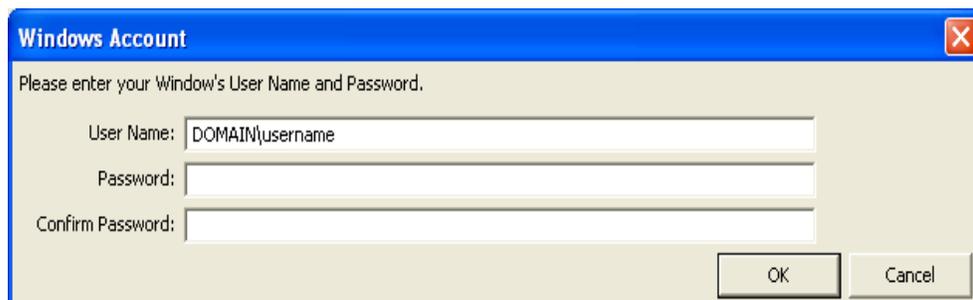
>   **NOTE:** Be very careful when entering account information – Windows does not verify the information until the task is run. If your task is not running on schedule, open the **Scheduled Tasks** window (using the instructions in the **Canceling Scheduled Tasks** section) and scroll to the right. 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.

5. Click OK in the Windows Account window. After a few seconds, you will receive a message describing the scheduling that took place:

6. You can open **Scheduled Tasks** (**Programs/Accessories/System Tools/Scheduled Tasks**) to view the newly created tasks. The task will be labeled **Discovery PPHarmony District Extract**. You can double-click the task to modify it further if you desire.
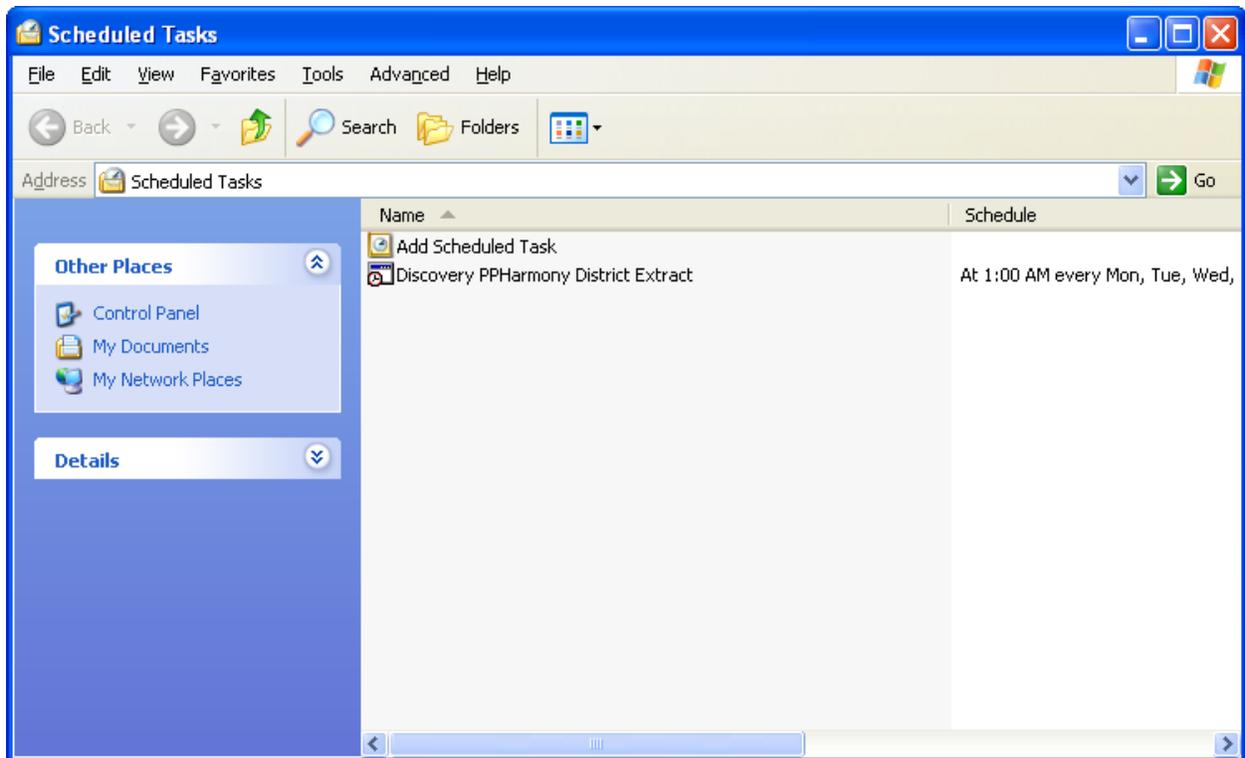
You can use this window to make sure that your scheduled tasks are running correctly.   The Next Run Time will indicate when the extract is next scheduled to run. The Last Run Time will tell you when the extract last started to run. The status field will indicate if the extract is running.

By Right Clicking the task and selecting Run you can get the scheduled task to run immediately instead of waiting for the Next Run Time.

Using Windows Scheduled Tasks - Advanced

The Extractor accepts parameters from the command line, allowing the automated run of extraction from any scheduling system that supports command line output. For our example, we use Windows' Scheduled Tasks feature. This information also applies to editing tasks created by the **Schedule This School** feature, described above.

To use Windows' Scheduled Tasks to schedule the Extractor, follow these steps:

1. Select **Programs/Accessories/System Tools/Scheduled Tasks**. The **Scheduled Task** control panel appears.

2. From the **File** menu, choose **New->Scheduled Task**. The new task appears in the main window. Give the task any name you like.

3. Double-click the new task to edit it. Make these changes:

   a. Under the **Run edit box**, click **Browse** and locate the **PPHarm.exe** file, which by default will be in **Program Files\Discovery Software\Principalm\Harmony**. Select **PPHarm.exe** and click **Open**.

   Click inside the **Run edit box** and move the cursor to the end of the path. Add parameters to the command as follows:

Parameter Code	Description	Location in Extractor	Example
-d	Harmony DSN	Connection View	-d"Harmony"
-u	User Name	Connection View	-u"admin"
-w	Password (plain text)	Connection View	-w"opensesame"
-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.	Connection View	-z"abiel$@0ls^#D"
-n	School Number	School List View	-n101
-i	Export Inactive Students/Staff	School List View	-i
-p	Import Folder	School List View	-p"c:\Import Folder"
-l	License File	School List View	-l"C:\PPLicense\JeffersonHigh.paf"
-ad	Demographic Extracts Only	n/a	-ad
-aa	Attendance Extract Only	n/a	-aa

   NOTE: Remember to place quotes around parameters that might contain spaces.

   Any non-required parameters that are not specified remain the same as what is set using the steps from Chapter 1 and 2. For example, to import into a Principalm Import Folder of c:\test, using the default Harmony Folder, School Year, and School Number, the command looks like this:

```
"C:\Program Files\Discovery Software\Principalm\Harmony\PPHarm.exe" -p"c:\test" –
u"admin" –w"opensesame"
```

The License file parameter can be used to add additional schools without configuring them in the interface. Simply specify unique key paf files for each school you wish to add. They will then be automatically added to the UI with the specified parameters.

The Demographic and Attendance Only parameters (-ad and –aa) can be used to tell the extractor to only run the appropriate portion of the extraction process. This is helpful if you wish to schedule the two types of extracts at different intervals. If you don't include either parameter the extractor will automatically run both parts.

b.   Test the **Run** entry.

   i.   Click **Apply** in the **Scheduled Task** property editor to ensure your changes are saved. If **Apply** is disabled, the changes have already been saved.

   ii.   Click in the **Run** edit box and press **CTRL+A** to select all of the text.

   iii.   Press **CTRL+C** to copy the text to the clipboard.

   iv.   Choose **Run**… from the **Start** menu.

   v.   Press **CTRL+V** to paste the text into the **Run** window.

   vi.   Click **OK** to run the command. If the command is correct, the Extractor progress bar will appear, executing the extraction you specified. If any error messages appear, fix the error in the **Run edit box** in the **Scheduled Task** property editor, and repeat steps **i** to **v**.

   vii.   Check the exported data to verify that it is what was expected. This is most easily done by importing the results into Principalm and looking at the information.

c.   Click the **Schedule** tab. Enter the scheduled time(s) you would like the Extractor to run. Consult your Windows help for further information on scheduling.

d.   Click OK to close the **Scheduled Task** property editor. Windows presents a **Set Account Information** dialog. Enter the user name and password of a user who has permission to run the Extractor, and click **OK**.

NOTE: Be very careful when entering account information – Windows does not verify the information until the task is run. 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.

Canceling Scheduled Tasks

Both the **Schedule This School** feature and **Windows Scheduled Tasks** create tasks that show up in the **Scheduled Tasks** program.

To cancel a scheduled task, follow these steps:

1.   Select **Programs/Accessories/System Tools/Scheduled Tasks**. The **Scheduled Task** control panel appears.

2.   Right-click the task you wish to cancel, and choose **Delete** from the menu that appears. Select **Yes** when asked if you are sure.

Chapter 4 – Customizing Harmony Export

What Can I Customize?

Currently, any student information that has a one-to-one relationship to a student can be exported to appear on the ID, Contact, and/or School tabs.

We are continuously working to expand our customization capabilities, so if you don't see what you want here, please contact us.

Customizing the Export

Creating a Custom PDE

Please refer to http://discoverysoftware.com/support/tech/ for the latest information on constructing a custom export.

Chapter 5 – Uninstall

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

1. Go to Start->Control Panel->Add/Remove Programs.

2. Selected Discovery Data Extractor for Harmony.

3. Click Remove to uninstall.