Discovery Software

Discovery Data Extractor for Pentamation Open Series and StudentPLUS

Version 3.0.0.0

Installation and User Guide

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www.discoverysoftware.com

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Chapter 1 – Initial Setup

By this point you should have already installed the Discovery Data Extractor for Pentamation Open Series and StudentPLUS program using the installer that contained these instructions.

In order to use the Bridge for Pentamation Open Series and StudentPLUS, Discovery's Acorn will be installed. Acorn will streamline all of your export tasks, and make configuration and switching between schools much easier.

Once the installation has been completed follow the instructions below to run Acorn and configure your school information:

Acorn

Acorn is the graphical user interface that allows you to configure and manually extract data from the Pentamation Open Series and StudentPLUS (along with any other Acorn compatible bridge).

To Run Acorn, choose **Start->Programs->Acorn->Acorn**.

Acorn will show you a Guide page:
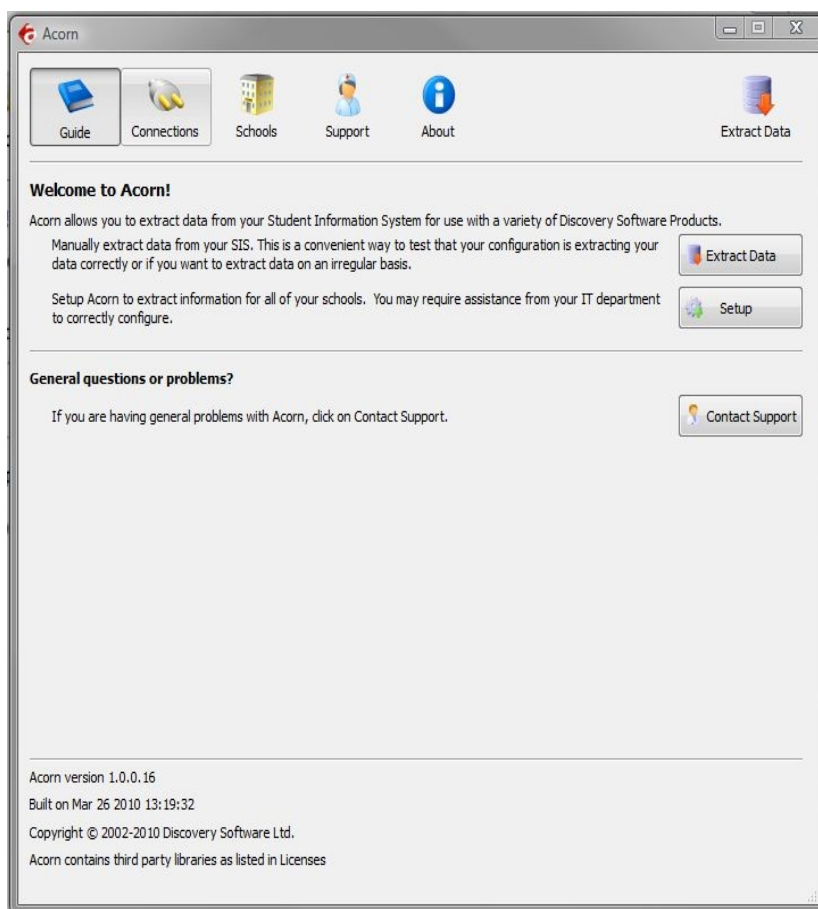
Click on the Connections tab button to start configuring the Pentamation Open Series and StudentPLUS Data Extractor.

Configuring the Connection

Clicking the on the 🪝 Connections tab button will display the following:
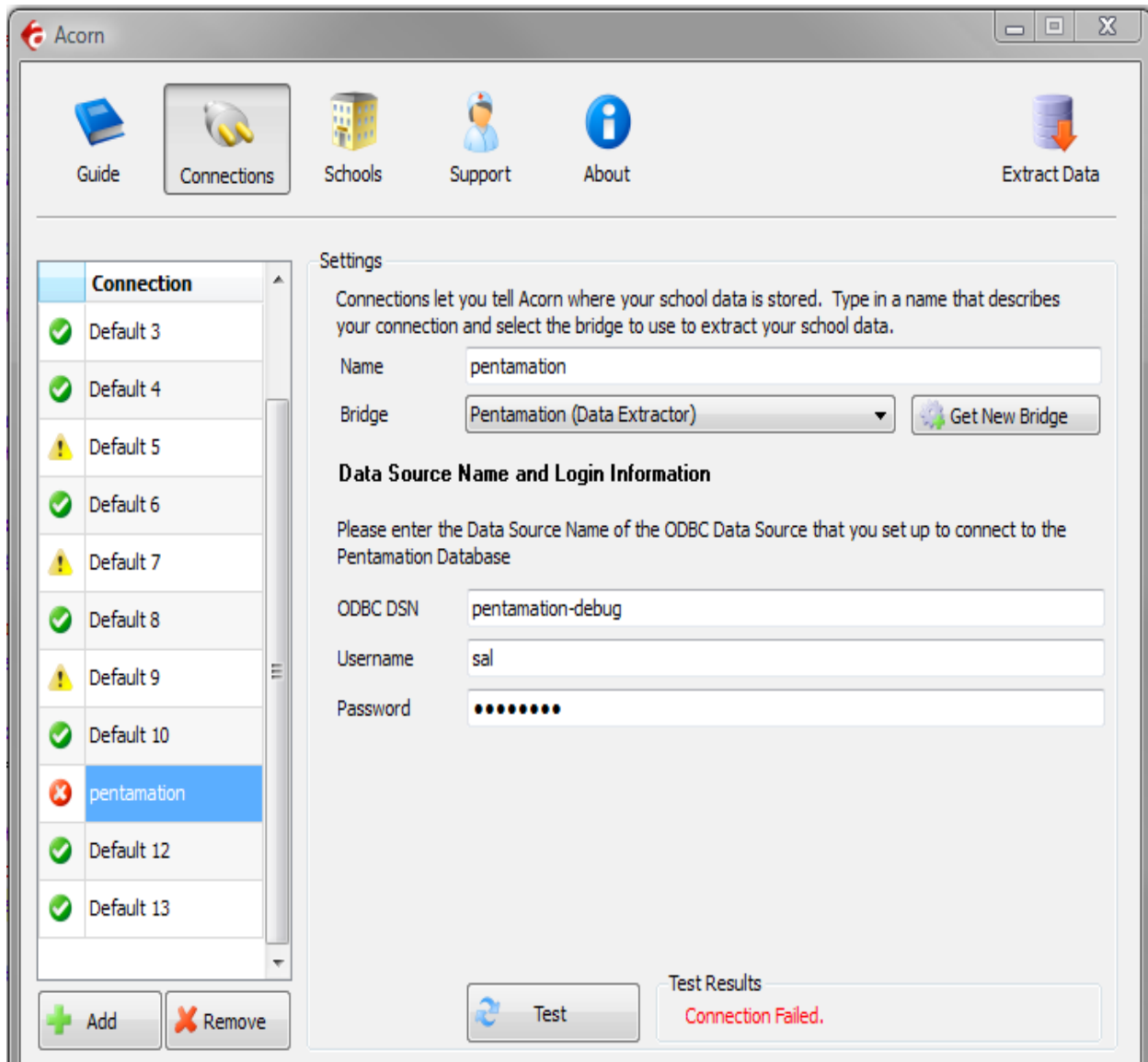
Adding a Connection

1. Click the Add button to create a new connection

2. Enter a name that you want to use to identify the connection. Eg. Pentamation Open Series and StudentPLUS

3. Select Pentamation Open Series and StudentPLUS (Data Extractor) from the Bridge drop down.

4. Acorn will display the configuration parameters needed by the Pentamation Open Series and StudentPLUS Data Extractor to configure the Connection.

5. Fill in the fields as follows:

a. **ODBC DSN** – enter the name of the ODBC DSN to connect to Pentamation Open Series and StudentPLUS. If you have not created one see Appendix A-ODBC Setup (17)

b. **Username** – enter the username for the ODBC DSN.

c. **Password** – enter the password for the ODBC DSN.

6. Press the Test button to receive a message indicating the status of your connection. If the configuration for the connection is correct, a ✅ icon will appear next to the Connection name in the Connection list. A ❌ icon will be displayed next to the connection name if the configuration is incorrect. A ⚠️ icon will be displayed if you did not enter all the necessary configuration.

Automatically extract school data

Acorn can configure scheduled tasks so that the Pentamation Open Series and StudentPLUS Data Extractor is run on a periodic basis. By checking *Update demographic/attendance data automatically*, Acorn will create a schedule task that runs in the middle of the night. If you select the check-box *This Computer is turned off at night*, then the scheduled task will run at logon.

This feature enables your users to have the latest data from Pentamation Open Series and StudentPLUS without someone having to manually run the extractor to keep the data synchronized.

Once you have added and configured all the connections you will need for your schools, select the 🏢 Schools tab to complete the configuration.

Setting up a School

After you configure your Pentamation Open Series and StudentPLUS connection successfully, click on the 🏢 Schools tab button to configure School information.
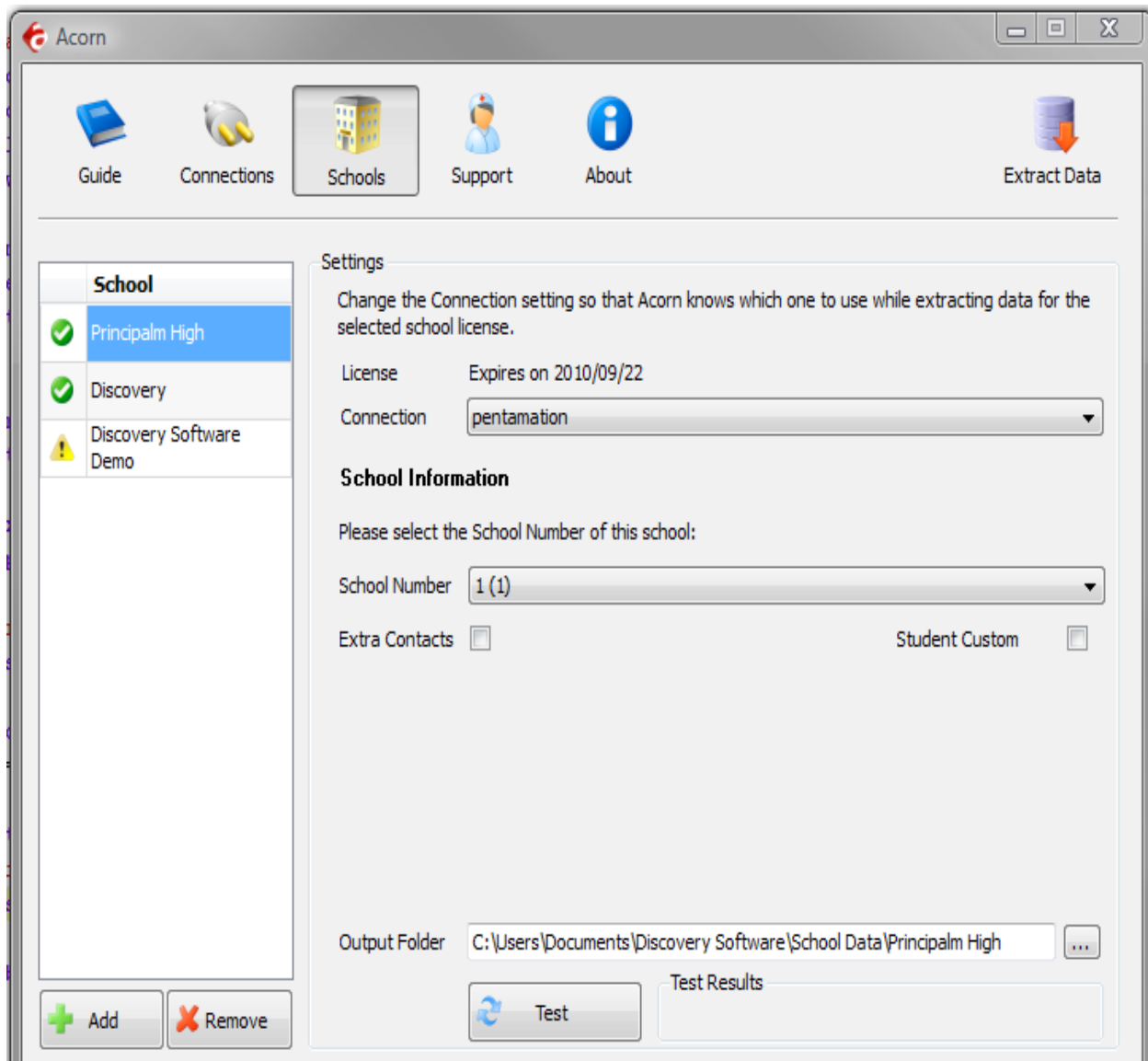
Any Discovery Licenses that exist in the License folder at *Documents/Discovery Software/Licenses* will automatically be added into the Schools list.

Adding a School

To enter a school:

1. Click the **Add** button and browse for one or more Discovery License files (.paf)
2. Optionally, drag and drop Discovery License files (.paf) onto the Schools list.
3. Select the connection name you want to associate with the selected school.

4. Select the name of the district from the **District** drop down.

5. Select the name of the school from the **School Number** drop down.

Press the **Test** button to receive a message indicating the status of your school information. If the configuration for the school is correct, a ✅ icon will appear next to the School name in the School list. A ❌ icon will be displayed next to the school name if the configuration is incorrect. A ⚠️ icon will be displayed if you did not enter all the necessary configuration.

Removing Schools

To remove a school:

1. Select the school you wish to remove from the Schools list.

2. Click on the Remove button

3. Confirm you want to remove the School by clicking on the "Yes" button.

Sharing Data

Acorn allows you to configure the Pentamation Open Series and StudentPLUS Data Extractor to share the extracted data to a location on your network that is accessible by users of Connect. Otherwise, Acorn will automatically store the extracted data in your local Documents folder at:

Documents\Discovery Software\School Data\<<School Name>>

Check the "Allow other computers on your network..." checkbox, and fill in the network path you want to extract data to. Please be sure to place the correct permissions on the school folders so that only users with the appropriate permissions can access the data.

If you want Connect to automatically update the licenses in Acorn, please make sure that the users of Connect also have write permission to this folder. For more information, please see the *Licenses* section below.

Diagnosing Issues with Acorn or the Pentamation Open Series and StudentPLUS Data Extractor

Clicking on the 👤 Support tab button will display the following:
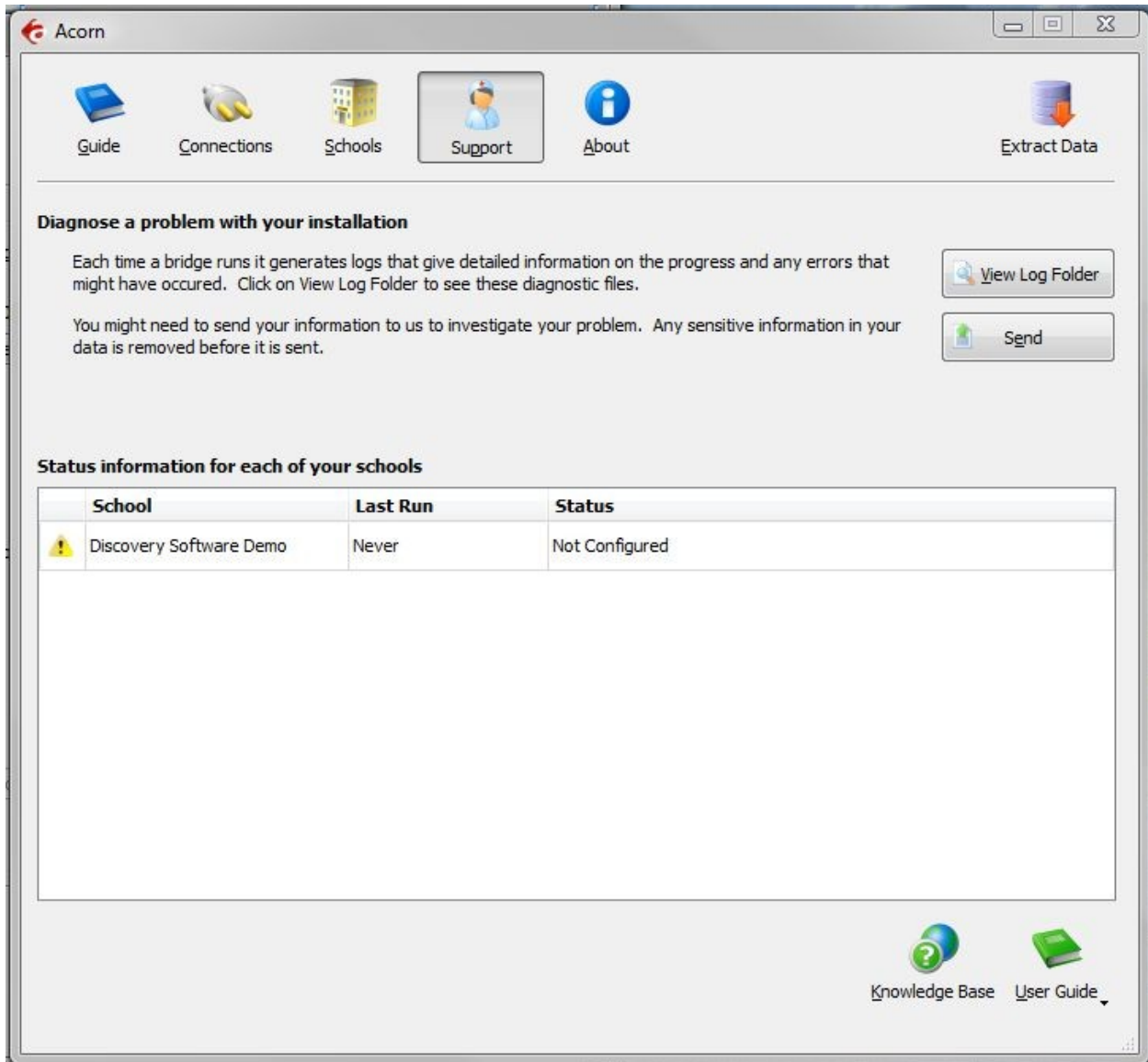
The 👤 Support tab helps you diagnose issues with your schools data extraction.

Diagnose a problem with your installation

The 🔍 *View Log Folder* button opens an explorer window containing the log files and folders. The main log folder contains the log files generated by Acorn itself. There will also be a separate folder for each school you have licensed. The logs generated while the bridge extracts data for your school will be stored in the school log folder.
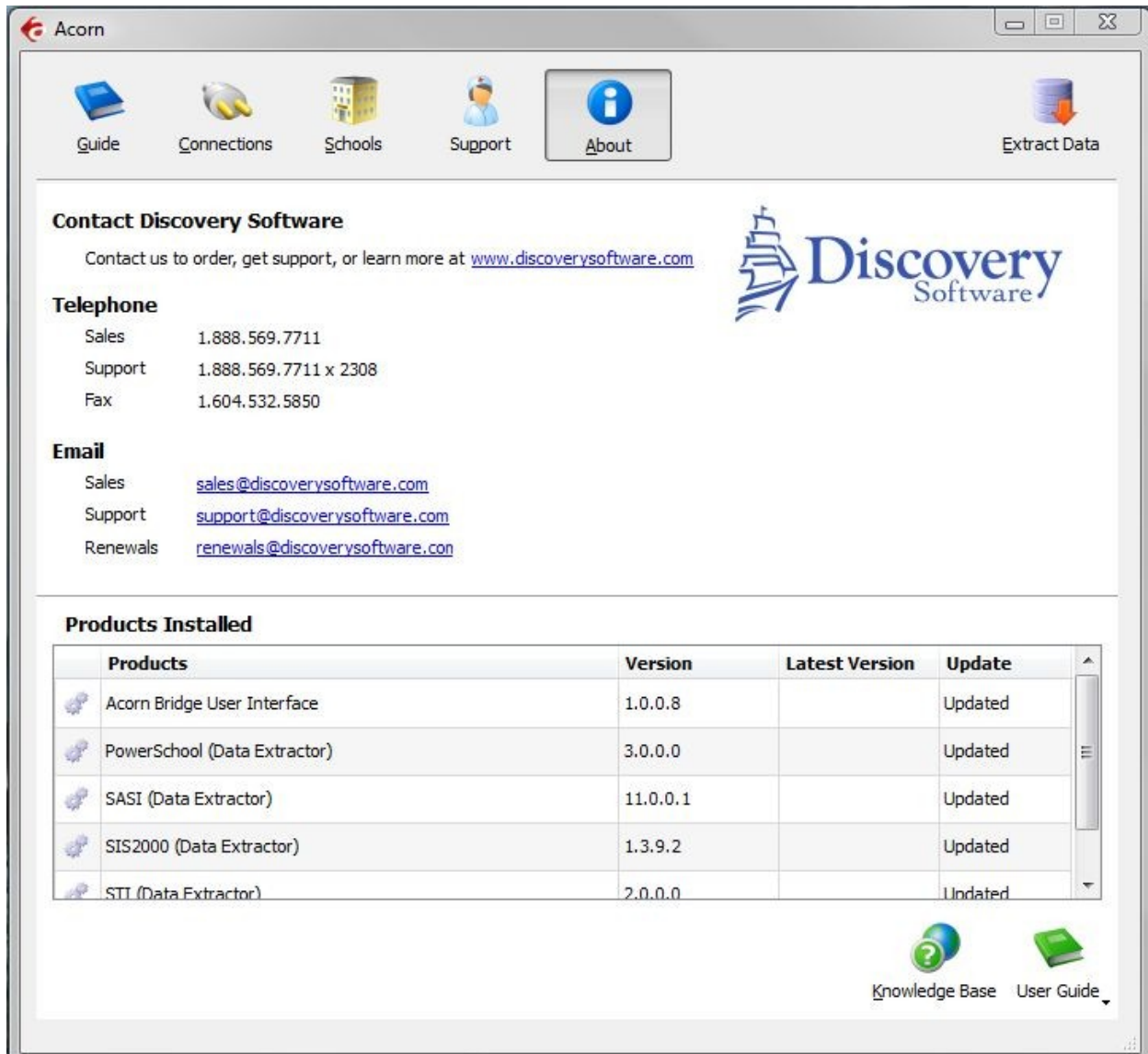
The *Send* button uploads the log files automatically to Discovery Software. The uploaded log files will help us identify and correct your issue. Any sensitive information in your data is removed before being sent.

Status information for each of your schools

The school table displays diagnostic information that allows you to see at a glace the last time the extract was run and its status. Each licensed school will appear in the table.

Contacting Discovery Software

Clicking on the ⓘ About tab button will display all of the contact phone numbers and email addresses so that you can easily contact Discovery Software.

Determining Installed Products

At the bottom of the ⓘ About tab is a table that displays a list of all the Discovery products and versions installed and usable by Acorn. Acorn will display an *Update* button in the table if new versions of installed Bridges are available.

Manually Extracting Data

Clicking on the ⬇ Extract Data tab button, display a list of all of the schools configured within Acorn.
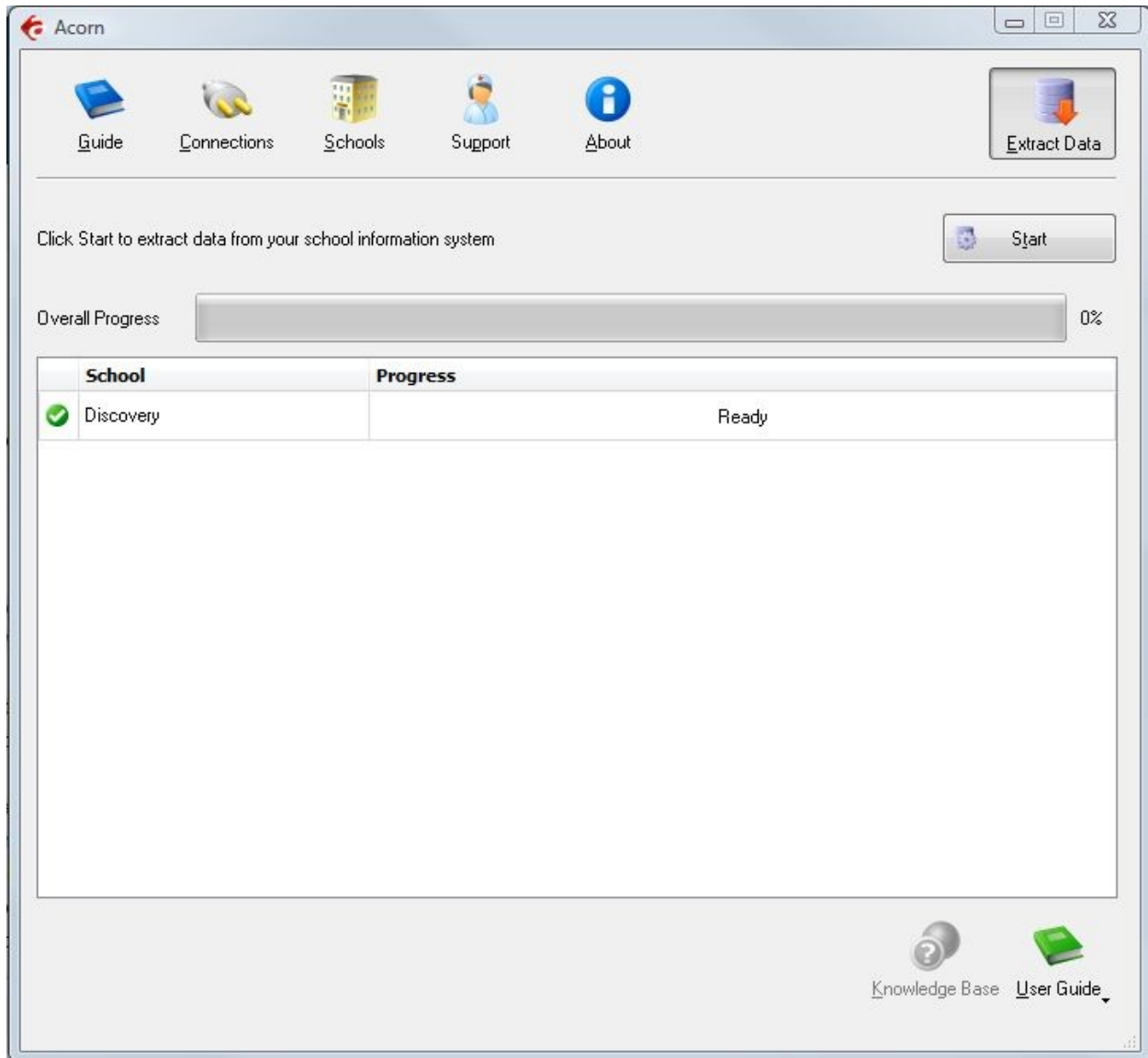
When the ⚙ Start button is clicked Acorn will run the first 5 schools that are correctly configured. As a school extract completes another will be started, so Acorn will keep 5 schools extracts running concurrently. A progress bar will appear for each school that is extracting. It will display a text message that indicates the current extract being generated over the top of the progress information.

Photo Export

Pentamation Open Series and Student Plus Data Extractor   does not currently support extraction of photos directly from the **Pentamation Open Series and Student Plus** database. Due to the use of views, we do not know the exact fields within SIS 2000 which relate to photo ID numbers. Typically these ID numbers will relate from our StdKey or StaffKey which is typically the ID_NUMBER field in the Student and Staff table.

Any photos that are to be imported he photos must be in .jpg format and the value found in the **Pentamation Open Series and Student Plus** 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 2 – Advanced Setup

Using Windows Scheduled Tasks - Advanced

The Extractor is designed to run from the command line. Acorn automatically creates and schedules a batch file that contains the command lines used for all of your schools. If you change settings in Acorn, the batch file will automatically be updated to reflect the new settings

To modify the Schedule task that is created by Acorn:

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

2. Double-click the task created by Acorn to edit it.

3. Consult your Windows help for more details on how to use Task Scheduler for your version of Windows.

If you would like to manually create a batch file to run the Extractor, please use a different batch file name since Acorn will automatically rewrite its batch file whenever settings are changed within the Acorn interface.

Command Line Parameters

The Pentamation Open Series and Student Plus Extractor uses command line parameters to tell the extractor to perform certain actions and pass the necessary configuration information.

Command argument

The first parameter tells the extractor what task you would like it to complete.

Command	Description	Requirements
help	Displays usage for all arguments	
params	Lists the parameters that are required by the extractor.	Must include: –group or -paramkey (see below)
test	Test the extractor for the specified group.	Must include: –group
run	Extract data	Must include: Extract type: -all, -demo or -att -license -path Specific params dependant for groups
version	Get the version of the extractor	

Command optional Parameters

The command parameter is followed by a number of required parameters for that option.

Parameter	Description	Example
--group=value	This indicates which group you would like information for. Currently, the extractor supports the connection group and the school group	--group=connection or --group=school
--paramkey=key	This indicates which param to return or list values for. This can be any valid paramkey used by the extractor. See below.	--paramkey=dsn
Extract type --all, --demo, --att	This parameter tells the extractor if you want a full or partial extraction: -all : extracts all data supported -demo : extract just demographic	--all

	information	
	-att : extract just attendance information	
--license=path	The full path to the license file to use for this extraction	--license=C:\ mylicense.paf
--path=path	The full path to where the extracted data should be placed.	--path=C:\myschool\
--logpath=path	The full path to where logs should be placed.	--path= C:\myschool\logs\
--log=option	Where "option" can be any of these values: --log=off : no logging at all --log=consoleoff : no logging to the console --log=fileoff : no logging to file --log=sqloff : no logging to sqlite --log=extract : no logging to console while logging extract	--log=off --log=consoleoff --log=fileoff --log=sqloff --log=extract

The extractor supports the following *Connection* parameters:

Parameter	Description	Example
--dsn	The dsn name you created if you use MS SQL Server or Oracle	--dsn=Pentamation Open Series and Student Plus
--user	The username for the odbc dsn.	--user=PSNavigator
--pwd	The password for the odbc dsn	--pwd=mypassword
--pwdencode	The encoded password for the odbc dsn, using the automatic scheduler will create an encoded password.	--pwdencode=!H&f3$%&

The extractor supports the following *School* parameters:

Parameter	Description	Example
--district	The district number to extract	--district=12
--school	The school number to extract	--school=999

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

All parameters must be set each time the extractor is run. No parameters are remembered between runs.

Chapter 3 – Customizing Pentamation Open Series and Student Plus Export

Custom Fields: StudentCustomConfig.pde

By default the Custom fields exported will be hidden in Principalm if you want to include any specific fields you will need to change their settings with the StudentCustomConfig#.pde file. There may be more than one of these files in your exported data, this is based on the custom screens listed within your SIS. This process is detailed within the file itself but is also explained here:

In order to manually make changes to this file you will need to open it in a text editor (notepad is the default editor on Windows).

Once you open the file you will see this:

// If the field you want is listed as #customhiddenfield change it to another field type

// if you want it to be displayed. Or you can change where it appears by changing the type of custom field as below:

// #custombasicfield	To have it appear on the ID tab
// #customschoolfield	To have it appear on the School tab
// #customcomfield	To have it appear on the Contact tab
// #custommedfield	To have it appear in the Medical Section
// #customgradefield	To have it appear as a Grade column
// #customcndoutfield	To have it appear in the Conduct Outcomes Section
// #customcndinfield	To have it appear in the Conduct Incident Section
// #customhiddenfield	To have it not appear in Principalm

// Change the second quoted field on the line to the title you wish the field to appear as.

After the header you should see at least one line that will look similar to this:

//#customschoolfield "Field" "Title" "Type"

This is the line you will need to modify. As the header noted, change the first portion to indicate where you would like the custom field to appear.

The second column is the Field Name, do not change this value.

The next value is the Title, this is the label that will appear in Principalm describing the field.

The last column is the Type, this column describes the data, and how it will be displayed. Typical formats are:

Formats:

NOFORMAT	use this if you know this field has no formatting, or should not be
formatted	
EMAIL	for email addresses
PHONE	to indicate a phone number
FAX	fax number, will be formatted like phone number, but ignored by
autodialers	
DATE	

TIME

DATETIME

References:

STUDENT   Will create a link to an existing student, by StdKey

STAFF   Will create a link to an existing staff member, by StaffKey

SECTION   Will create a link to an existing section, by SecKey

Grade Types:

LETTER   a Grade Type for letter grades.

NUMBER   a Grade Type of numeric, for percents.

This file is only created the first time you run the data extractor. This means that any changes you make to the file will be kept. If you wish to generate a new version, we suggest renaming the file (ie StudentCustomConfig.old). If the data extractor does not find the file StudentCustomConfig.pde it will generate a new one.

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 Pentamation Open Series and Student Plus. If you have suggestions on fields that exist in Pentamation Open Series and Student Plus 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.

Chapter 4 – Uninstall

To uninstall the Discovery Data Extractor for Pentamation Open Series and Student Plus from your system, follow these steps:

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

2. Selected Discovery Data Extractor for Pentamation Open Series and Student Plus.

3. Click Remove to uninstall.

Appendix A – Informix ODBC Setup

The Discovery Data Extractor accesses **Pentamation Open Series and Student Plus**'s Informix database via 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:

• Vista or Windows 7: if you are using 64 bit OS you must run the 32 bit version of the Data Source administrator.

◦ Click on **Start->Run**

◦ Type **C:\WINDOWS\SysWOW64\odbcad32.exe**

◦ Hit **Enter**. This will open the 32 bit version.

◦ Help available at: http://www.discoverysoftware.com/support/kb/sis-bridges/64bit/

• 32 bit users: From the **Start** menu, choose **Control Panel**.

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

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

1. 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.

2. 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 **Pentamation Open Series and Student Plus**:

Installing the Drivers

To set up an Informix DSN you will first need the following information from your IT department (or request you IT department's help with this process):

- IP address of the Pentamation Host
- DNS Hostname of the Pentamation Host
- DBPATH of the Host's Pentamation student database
- Informix Server Name on the Host
- the Pentamation student database name
- a valid Pentamation access ID and password

Next we will install the Informix client and set up the ODBC DSN. This portion of the setup is fairly technical, so if you are unsure of anything please contact your IT department:

1. Install the Informix client. This is a licensed product from Informix that should have been provided as part of your Informix installation. Generally it is available on CD, or as a file distributed on your network.

2. Locate the Hosts file in "c:\windows\system32\drivers\etc" or "c:\winnt\system32\drivers\etc" and add this line:

xxx.xxx.xxx.xxx DNSHostName

Where xxx.xxx.xxx.xxx is the IP Address of your Pentamation Host, and DNSHostName is the DNS name of your Pentamation Host machine.

3. Locate the Services file in "c:\windows\system32\drivers\etc" or "c:\winnt\system32\drivers\etc" and add this line:
   sqlexec 1525/tcp

Set SETNET32 variables

The ***Informix Client install*** places a SETNET32 utility in the Start/Programs menu. Click the shortcut to run SETNET32 and ensure these parameters are set:

On the Environment tab:

INFORMIXDIR=/c:\Informix/	This is the installation folder of the Informix client.
INFORMIXSERVER=/xsrvr/	This is the name of the Informix server on the host (this may be different if you have a different server name enter it here) DBPATH=//stubase/schdata/
	This is the DBPATH of the Host's Pentamation student database (again this may be different, if you are having trouble finding this value log on to the server and display the DBPATH this should be the same)

On the Server Information tab:

|	
Informix Server: /xsrvr/	Same as INFORMIXSERVER above.
Host name: /DNSHostName/	Same as DNSHostName in step 2.
Protocol: sesoctcp	
ServiceName: sqlexec	

Click **Make Default Server.**

On the Host Information tab:

User name	A valid Pentamation ID that has access rights to extract data.
Password option	Ask Password at runtime.

Close the SETNET32 utility.

Create the ODBC DSN

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

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

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

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

  1. On the **System DSN** tab, click the **Add…** button.
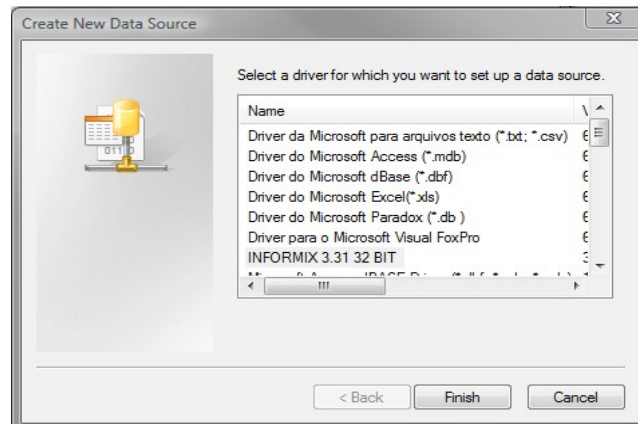
  2. From the list of drivers that appears, choose **INFORMIX [version] 32 BIT**, and click **Finish**.

     Informix ODBC Driver Setup screen will appear.

  3. On the **General** tab: Enter the **Data Source Name**, enter a name for the data source. Remember the name you choose, it is the same name you should enter in the **Pentamation Open Series and Student Plus** DSN box in the Extractor.
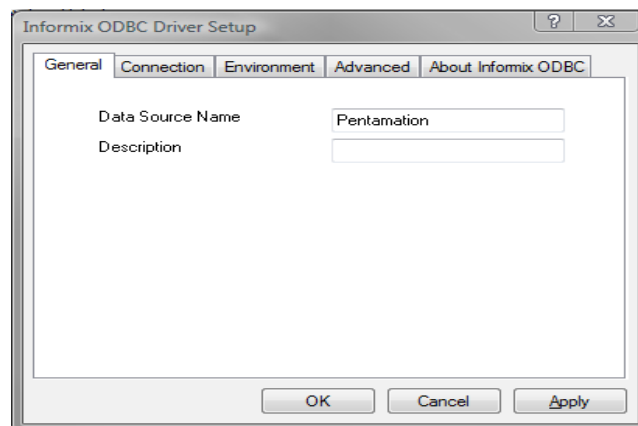
4.On the Connection tab:
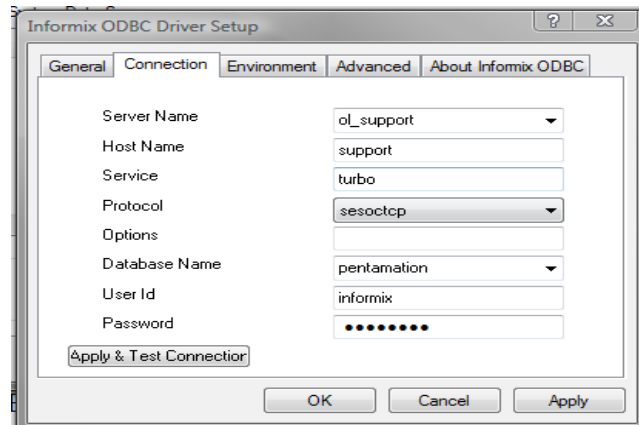
- Server Name: /xsrvr/ ← Same as INFORMIXSERVER in step 4. (should be populated already)

- Host name: DNSHostName ← Same as DNSHostName in step 2.

- Service: sqlexec (should be populated already)

- Protocol: sesoctcp (should be populated already)

- Database: /studentDBName/ ← Name of the Pentamation student database.

- User Id: Valid Pentamation ID

- Password: password for the above ID

1.Click **Apply & Test Connection**
2.Click **OK**

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

Common Problems or Errors

Unable to load translation.dll: You may need to set the variable INFORMIXDIR in the operating system to match the one defined in step 4 above.

You will need to set an environment variable to fix this:

Control Panel->System->Advanced Tab->Environment Variables

Create new Environment Variable labeled INFORMIXDIR = [location of Informix files]

See the following troubleshooting guide for more detailed help:

http://www-1.ibm.com/support/docview.wss?uid=swg21144413