

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



Discovery Data Extractor for School Minder Version 2.0.0

Installation and User Guide

Revised: February 13<sup>th</sup>, 2008

Copyright © 2002-2008 Discovery Software Ltd.

[www.discoverysoftware.com](http://www.discoverysoftware.com)

---

# Table of Contents

<b>Chapter 1 – Setting Up the Extractor.....</b>	<b>3</b>
Connecting to School Minder.....	3
Setting Up a School.....	4
Adding a School.....	4
Configuring a School for Export.....	5
Removing a School.....	5
<b>Chapter 2 – Manual Extraction.....</b>	<b>6</b>
Extracting Data from School Minder.....	6
School Minder Attendance Configuration.....	6
Import Data into Connect.....	6
<b>Chapter 3 - Scheduling the Extractor.....</b>	<b>7</b>
Using the Schedule This School Feature.....	7
Using Windows Scheduled Tasks - Advanced.....	9
Canceling Scheduled Tasks .....	10
<b>Chapter 4 – Customizing School Minder Export.....</b>	<b>11</b>
What Can I Customize?.....	11
Customizing the Export.....	11
Creating a Custom PDE.....	11
<b>Chapter 5 – Uninstall.....</b>	<b>12</b>

---

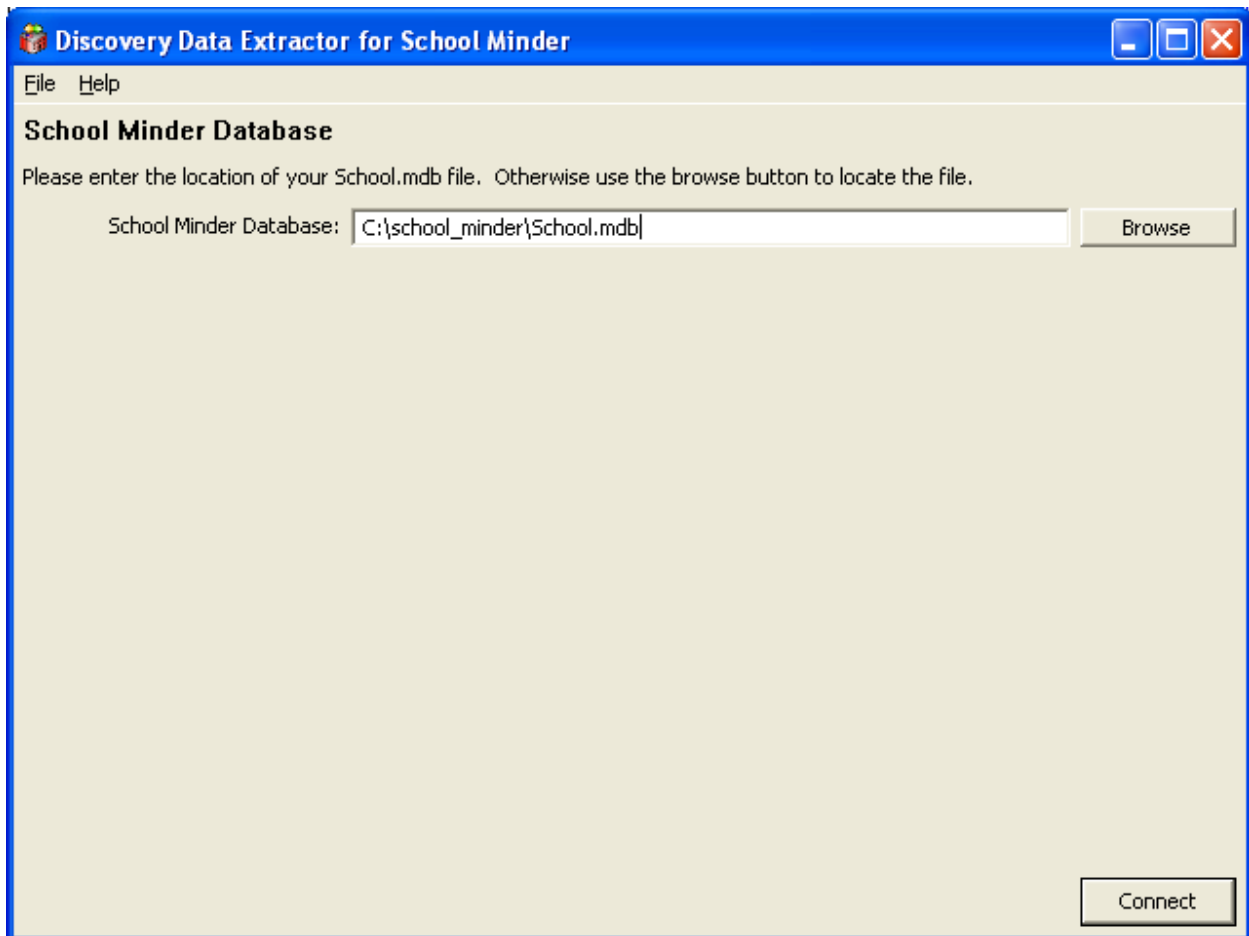
## Chapter 1 – Setting Up the Extractor

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

### *Connecting to School Minder*

If the Discovery Data Extractor for School Minder (hereafter “the Extractor”) is not already running, run it by choosing **Start->Programs->Principalm->SchMind->Discovery Data Extractor**.

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



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

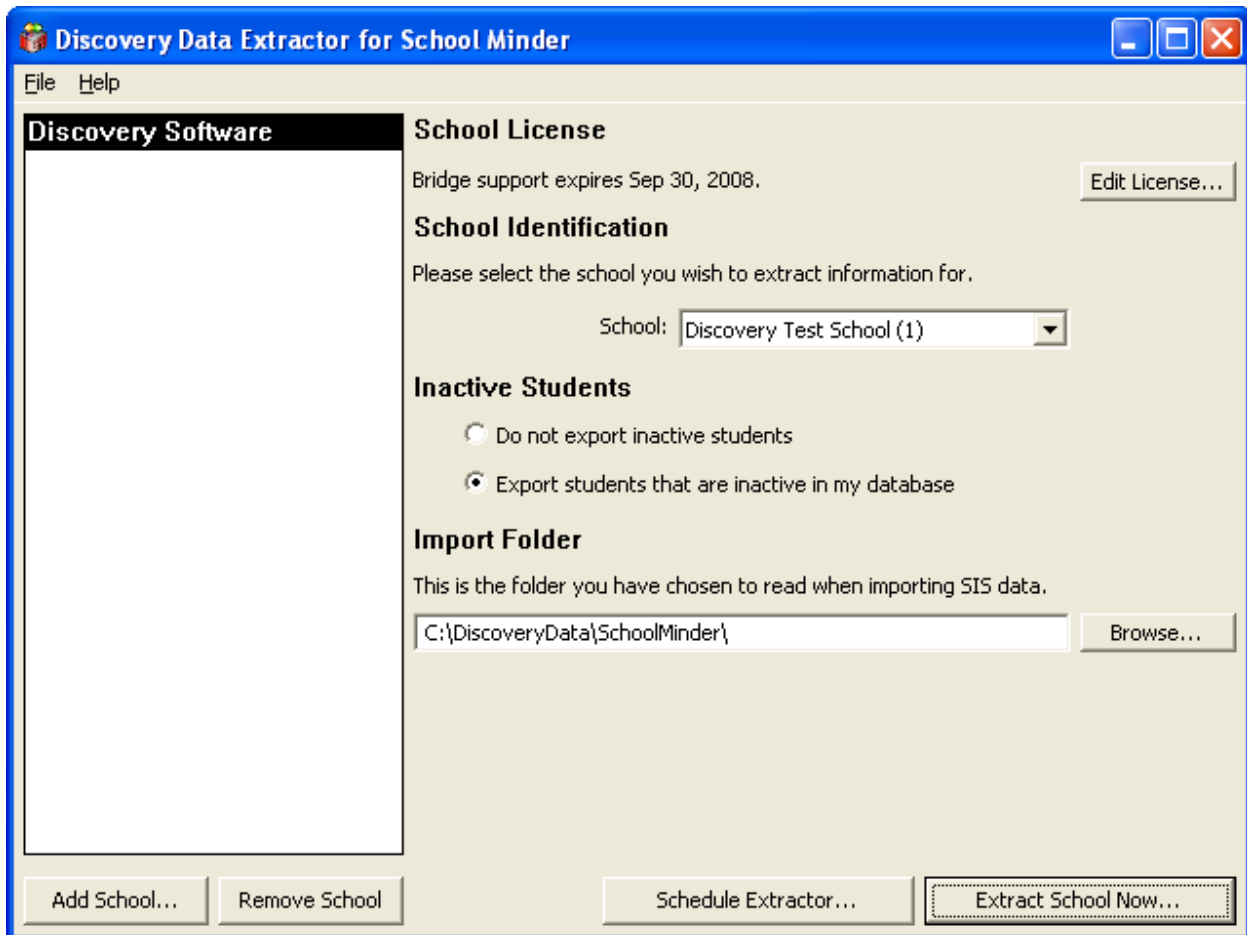
Fill in the fields as follows:

1. **School Minder Database** – Browse to the location of the School.mdb file.
2. 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 School Minder connection successfully, you are taken to the school list view:

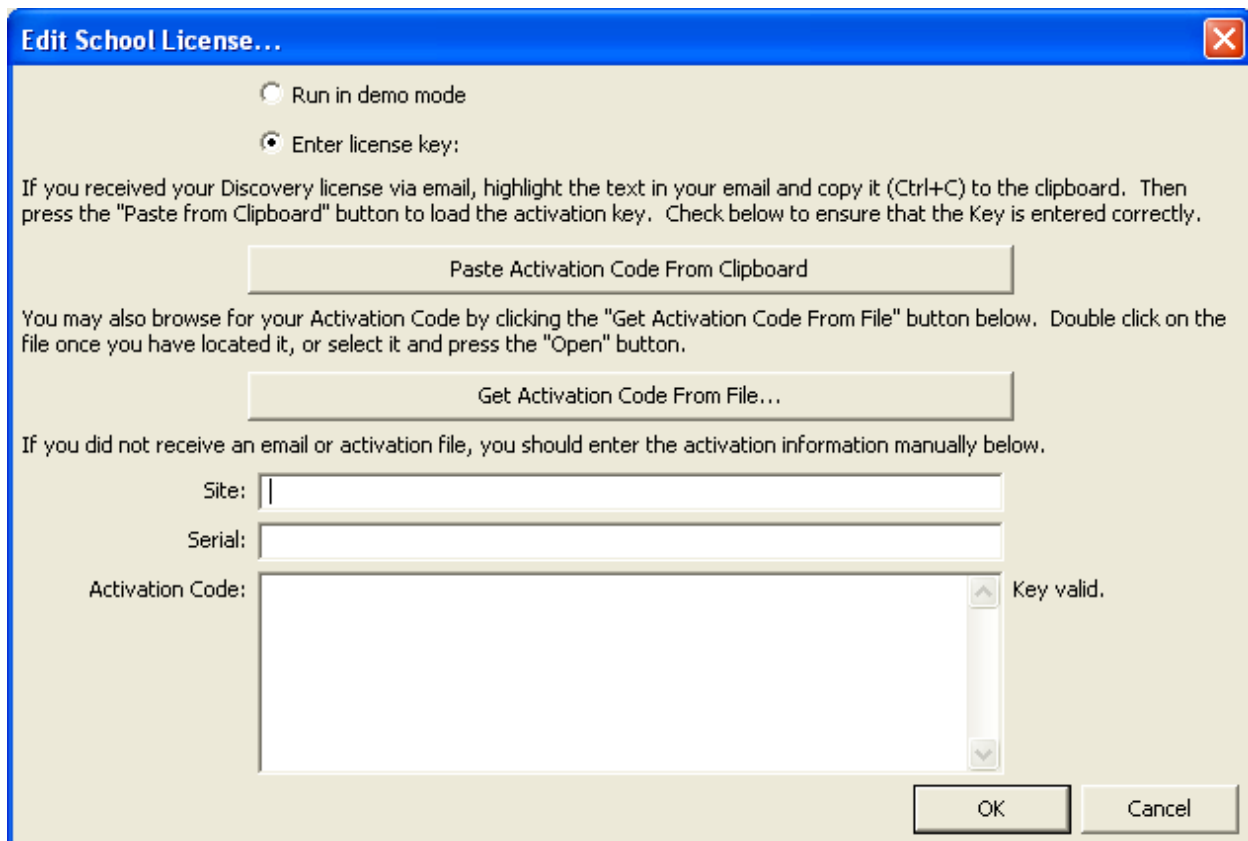


If you are running the Extractor on the same machine that you are using for Connect, your list of schools should contain all of the schools you have set up in Connect. If you are using a different machine, or wish to add additional schools, you will need to enter these schools manually.

## 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 Discovery license and wish to try out the product. 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. Select the name of the school from the **School** popup
2. Under **Inactive Students/Staff**, choose whether to export inactive students and staff members, and what date to use as a cutoff if you wish to export them.
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.

**NOTE:** If you change the folder in Connect, you must change the Import Folder Setting in the Extractor as well.

### **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 School Minder to Connect. If you wish to schedule the export process, please refer to the next chapter.

Manual transfer of data from School Minder to Connect involves two steps:

- Extracting data from School Minder
- Importing the data into Connect

### ***Extracting Data from School Minder***

To extract data from School Minder, follow these steps:

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

### ***School Minder Attendance Configuration***

The Extractor is designed to export attendance information via Connects Update Files (.pdu). This file type allows Connect to import information on an incremental basis. The Extractor will by default pull attendance up until the current day the first time it runs. It will then export the last two weeks of attendance information each time it runs. This overlap allows the extractor to capture data that might have been changed since the last run. If your school updates information older than 2 weeks then you should modify the overlap configuration setting in the SchoolConfig.xml file found in the import folder. To modify this setting open the xml file in a text editor and change the overlap attribute from 14 days to whatever day count you wish. The extractor will then use this setting on future extractions. Do not modify the UpdateDate setting. This is used by the extractor to determine the last time the attendance was updated.

### ***Import Data into Connect***

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

---

## Chapter 3 - Scheduling the Extractor

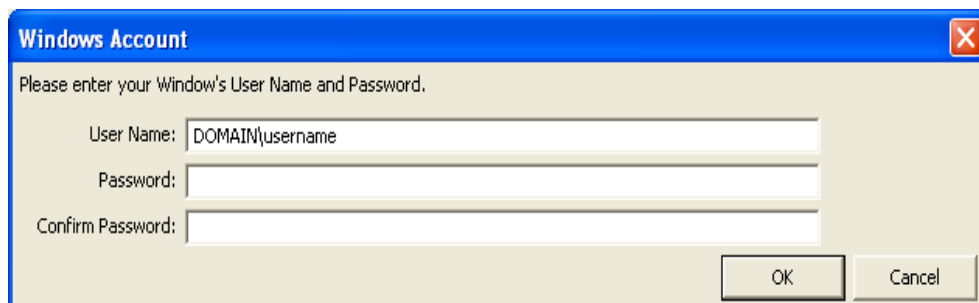
The Extractor can be scheduled in two ways. These are:

- 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:

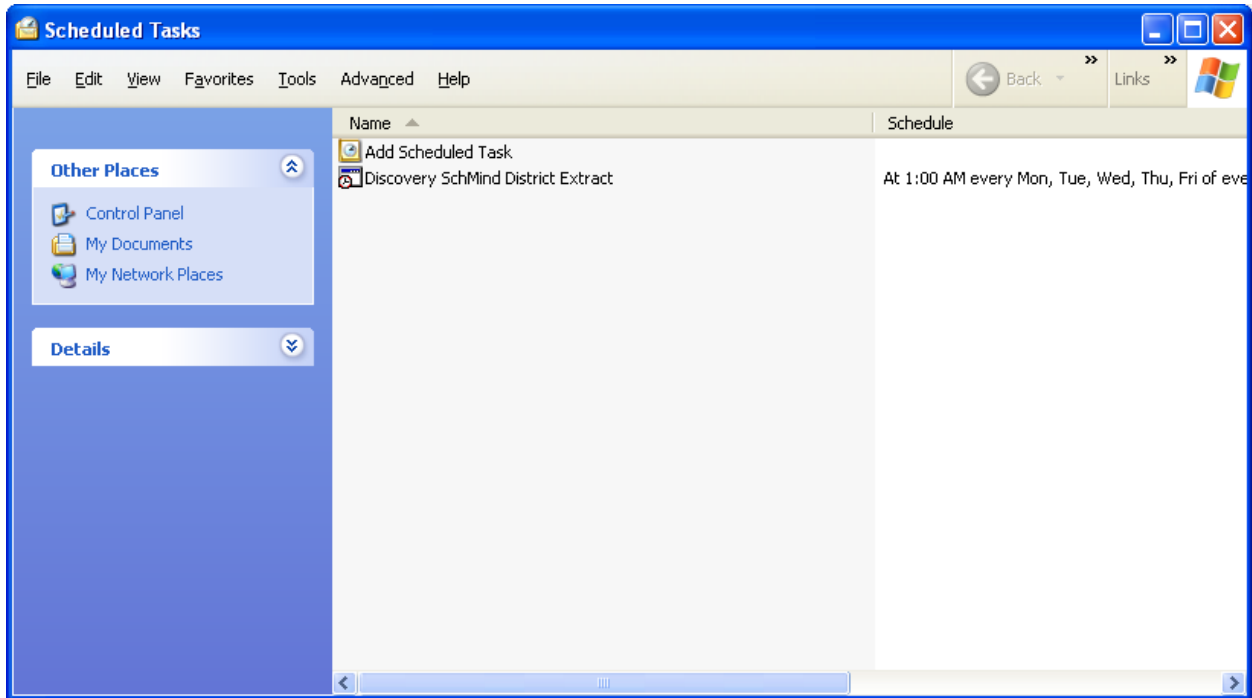


**NOTE:** Be very careful when entering account information – Windows does not verify the information until the task is run. If your task is not running on schedule, open the **Scheduled Tasks** window (using the instructions in the **Canceling Scheduled Tasks** section) and scroll to the right. If the 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 demographic extract will be labeled **Discovery SchMind District Extract**. You can double-click these tasks to modify them 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 **SchMind.exe** file, which by default will be in **Program Files\Discovery Software\Principalm\SchMind\**. Select **SchMind.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
-m	School Minder Database file	Connection View	-m"C:\SchMind\School.mdb"
-n	School Number	School List View	-n101
-i	Inactive Export – Export students that are inactive.	School List View	-i"yes"
-p	Import Folder	School List View	-p"c:\Import Folder"
-l	License File	School List View	-l"C:\APPLicense\JeffersonHigh.paf"
-a"ad"	Export Demographics and Attendance Extracts	n/a	-a"ad"
-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 Import Folder of c:\test, using the default School Minder Folder the command looks like this:

```
"C:\Program Files\Discovery Software\Principalm\SchMind\SchMind.exe" -p"c:\test"
```

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 a Discovery application (eg Principalm, Voicast) 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 School Minder 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 Connect's 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 School Minder from your system, follow these steps:

1. Go to Start->Control Panel->Add/Remove Programs.
2. Selected Discovery Data Extractor for School Minder.
3. Click Remove to uninstall.