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Discovery Data Extractor for Silk Version 2.0.1

Installation and User Guide

Revised: December 19<sup>th</sup>, 2007

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## Chapter 1 – Preparing Silk

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

### ***Configuring an Account In Silk***

The Discovery Data Extractor for Silk accesses Silk's database via the ODBC DSN supplied as part of Silk's setup. In order to run the Discovery Data Extractor, an account must be used that has read access to all school data tables within Silk.

You may use an existing account if it has the required permissions, otherwise please follow the instructions for creating/editing an account inside Silk to set up an account with those permissions.

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## Chapter 2 – Setting Up the Extractor

### Connecting to SILK

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

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

**Discovery Data Extractor for SILK**

File Help

**Silk DSN**

You will need to set up a DSN. Please refer to the user guide for instructions on setting up an DSN. Once you have set up the DSN, please enter the name in the box below.

Silk DSN:

**Silk Login**

Please enter the user name and password you use to log into Silk.

User Name:

Password:

Connect

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

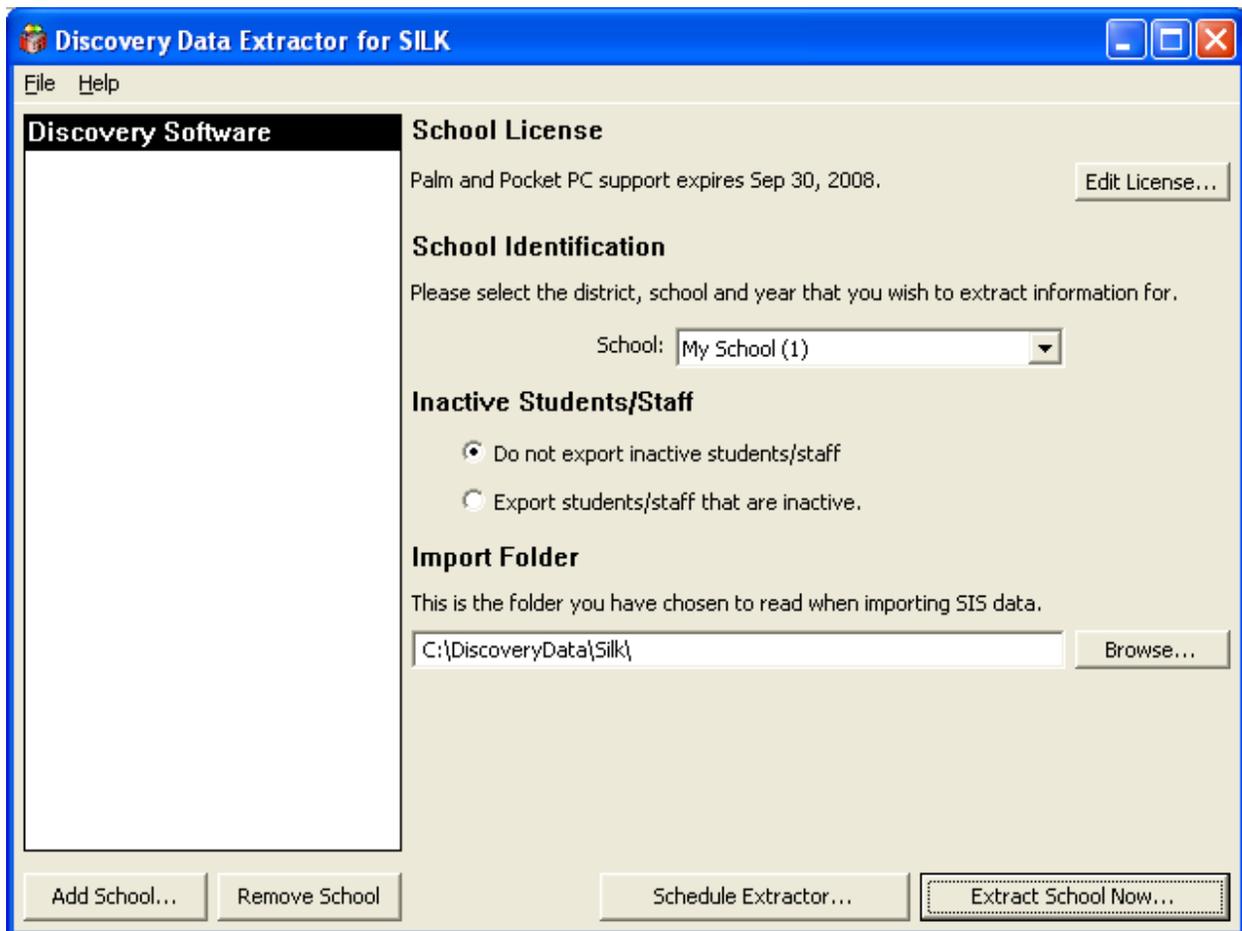
Fill in the fields as follows:

1. **ODBC DSN** – enter the name of the ODBC DSN you set up in Chapter 1
2. **User Name / Password** – enter the same user name and password that you use to log into server.
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.

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## Setting Up a School

After you configure your SILK 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.

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## 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:

**Edit School License...**

Run in demo mode

Enter license key:

If you received your Principalm license via email, highlight the text in your email and copy it (Ctrl+C) to the clipboard. Then press the "Paste from Clipboard" button to load the activation key. Check below to ensure that the Key is entered correctly.

Paste Activation Code From Clipboard

You may also browse for your Activation Code by clicking the "Get Activation Code From File" button below. Double click on the file once you have located it, or select it and press the "Open" button.

Get Activation Code From File...

If you did not receive an email or activation file, you should enter the activation information manually below.

Site:

Serial:

Activation Code:

OK Cancel

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. Select the building number of your school from the **School Number** 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 that was set from Connect's data, you must change that setting inside Connect as well.

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## ***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.

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## Chapter 3 – Manual Extraction

This section describes the process for manually transferring data from SILK to Connect. If you wish to schedule the export process, please refer to the next chapter.

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

- Extracting data from SILK
- Importing the data into Connect

### ***Extracting Data from SILK***

To extract data from SILK for Connect, follow these steps:

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

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## Chapter 4 - Scheduling the Extractor

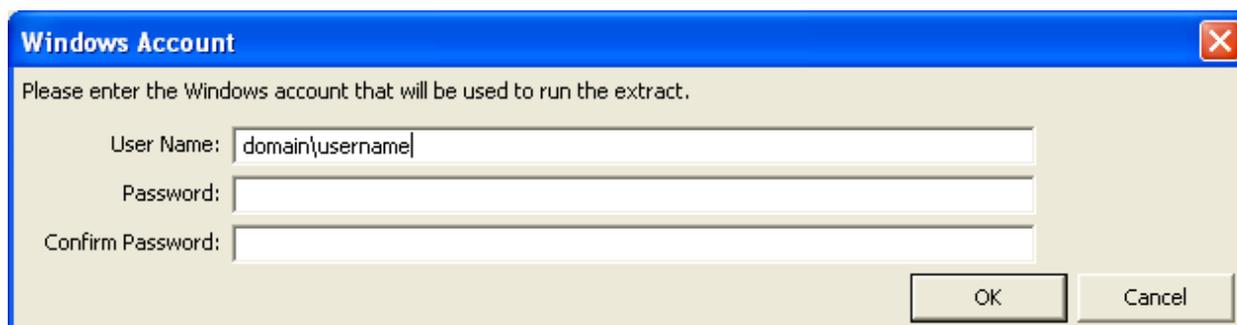
The Extractor can be scheduled in two ways. These are:

- 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:

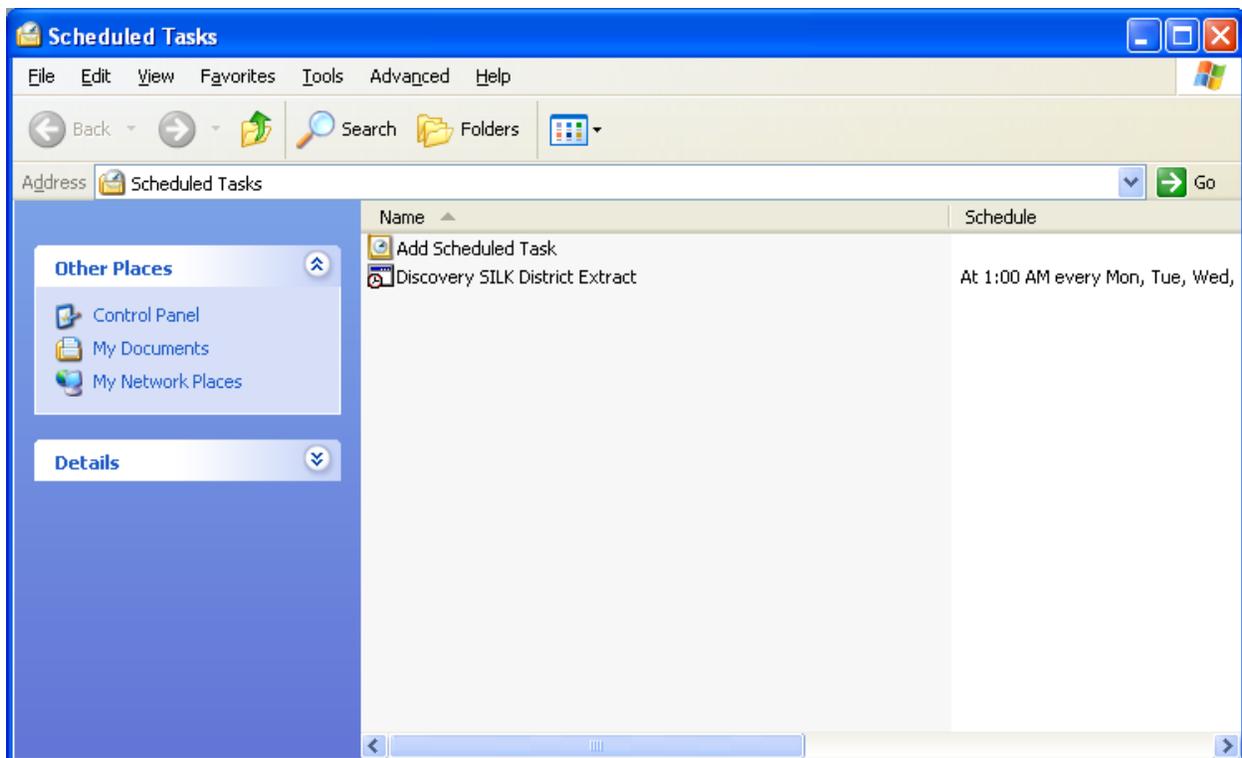


**NOTE:** Be very careful when entering account information – Windows does not verify the information until the task is run. If your task is not running on schedule, open the **Scheduled Tasks** window (using the instructions in the **Canceling Scheduled Tasks** section) and scroll to the right. If the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

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## 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 **PPSILK.exe** file, which by default will be in **Program Files\Discovery Software\Principalm\SILK\**. Select **PPSILK.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 (Matches Label in Extractor Window)	Example
-d	ODBC DSN Name	-d"SILK"
-u	User Name	-u"admin"
-w	Password	-w"open sesame"
-c	School Number	-c"1234"
-i	Inactive Cutoff Date – Provide no date to signify no inactives, dates are in YYYYMMDD format.	-i Or -i"20060223"
-p	Principalm Import Folder	-p"c:\Principalm Import Folder"
-l	License File	-l"C:\PPLicense\JeffersonHigh.paf"

**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 DSN, and School Number, the command looks like this:

```
"C:\Program Files\Discovery Software\Principalm\SILK\PPSILK.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.

- 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.

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## Chapter 4 – Customizing Silk Export

### *What Can I Customize?*

Currently, no customization of the Silk extraction is provided.

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

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## Chapter 6 – Uninstall

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

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