



DSL's SIS Liberty Installation and User Guide
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<http://apps.discoverysoftware.com/>

Developed by:



www.discoverysoftware.com

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Introduction

Discovery Software Ltd. has spent over 20 years perfecting a data extraction tool for more than 100 different Student Information Systems (SIS's). The extracted data needs to be in a standard format so that it can be compatible with our handheld applications such as Principalm.

We've realized that Principalm is not the only product that requires SIS data; our evaluation software, Rubrix, needs it as well. We've now dramatically extended the Acorn/Connect product that supplies data to Principalm so that it can send information to a variety of other external programs as well.

In extending the scope of this product, we've also changed the name to SIS Liberty – because it will completely liberate your SIS data while giving you complete control over how your student information is used.

The new **SIS Liberty** allows you to extract data from your Student Information System and use it with a variety of Discovery and third-party products. It is completely available to use when and where you need it – *your school, your data.*

System Requirements

Software Requirements:

- A compatible Student Information System. See our list of supported (but not limited to) SIS's:
<http://apps.discoverysoftware.com/support/bridges/>
- Provider Installation Package
<http://apps.discoverysoftware.com/>

Third-party software requirements:

Our software may require some third-party software. Our Provider Package Installer will attempt to download and install these products during installation.

Desktop Requirements:

Operating System:

- Microsoft XP or later
- Mac OS X (only supported via virtualization: VMWare Fusion, Parallels, Virtual Box, etc)

Hard drive space:

- 20 MB (for application)
- 1 GB for data (largely dependent on size of school, number of students, SIS etc)

Memory requirements:

- Minimums based on your OS requirements
- Recommended: 1 GB or more
- The more memory available the faster the application will run
- If running using virtualization, memory requirements are greatly increased.

Optional:

- WiFi (802.11) network (required for updating with Discovery Update Service)

Installation

Download and install SIS Liberty from:

<http://apps.discoverysoftware.com/>

Click **Run** to begin the installation then the **SIS Liberty** installation wizard will start shortly after.



Click **Next** to start the SIS Liberty installation wizard

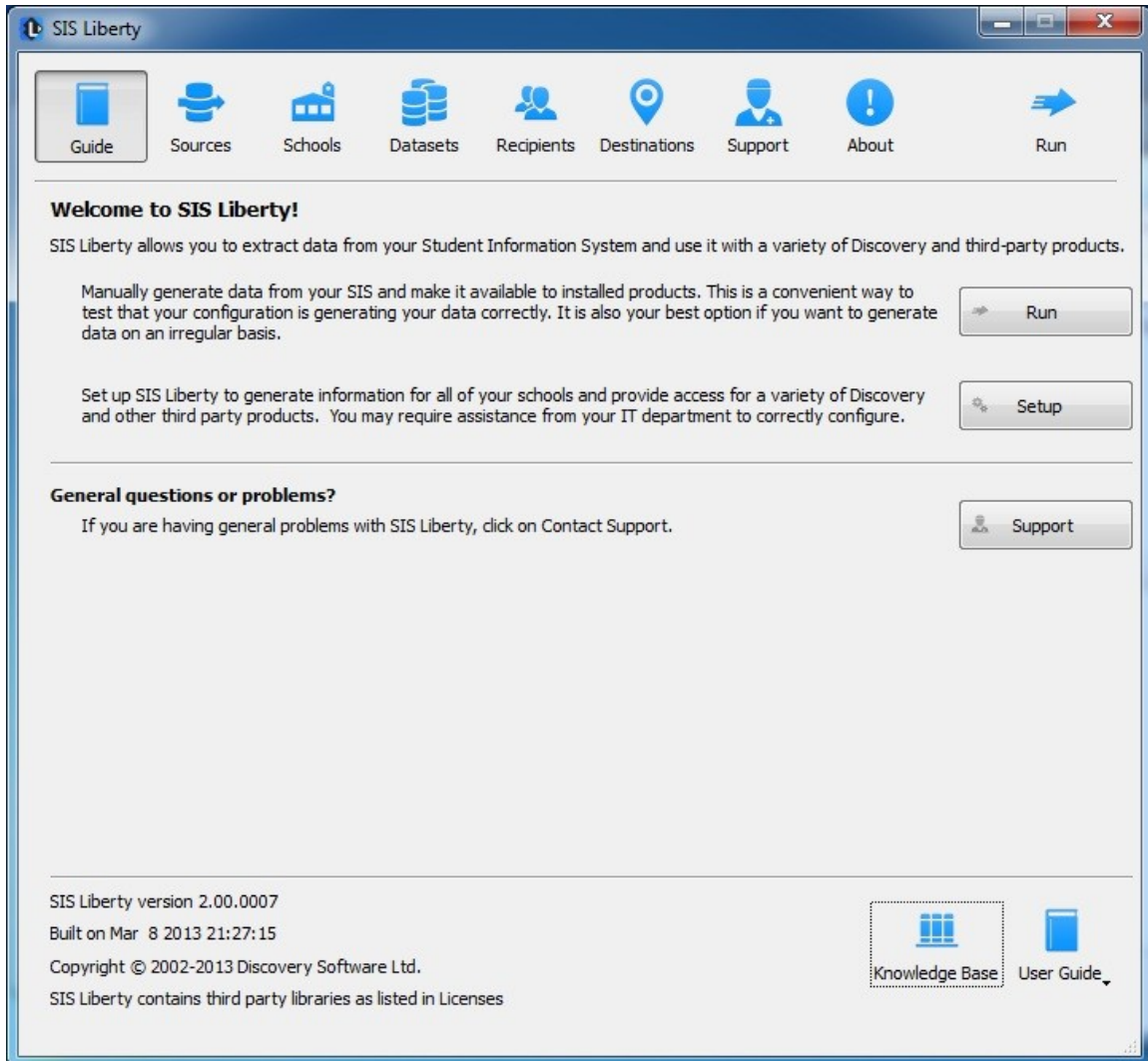


Click **Finish** to complete the SIS Liberty installation and check the “Launch the Program” box to start SIS Liberty.



Welcome to SIS Liberty

When SIS Liberty is launched you will be welcomed to the Guide tab:



SIS Liberty enables your school to extract data from your Student Information System to be used with Discovery and third party products.

Follow the tabs above to configure your data sources, schools and users then update to a directory retrievable by each recipient.

Setting up Sources

Here you will set up, configure and define where your information originates. Click **Add** to add your first source.

Data Source: Choose your SIS from the drop down menu. If your SIS is not listed click “*Get New Source*” to access the list of SIS’s supported, then download the appropriate SIS. Select “Manual Extract” if data will be exported from your SIS manually. If Manual Extract Bridge is selected, enter the folder path to where your datasets are stored.

Name: Create a name that best describes this data source

Data Sources Name and Login Information: Depending on your

SIS, the configuration settings will vary. For more information on this section, access your SIS User Guide under the Guide tab.

Setting up your Schools

Click Add to import your school **license** (.PAF) that was provided to you by Discovery Customer Care (ie: SchoolName.paf). School license will now be added to the left panel. Licenses saved to \\Documents\\Discovery Software\\Licenses will be imported automatically.

Source: choose the SIS Data Source that was configured under the Sources tab.

The screenshot shows the SIS Liberty application window. The top menu bar includes icons for Guide, Sources, Schools (selected), Datasets, Recipients, Destinations, Support, About, and Run. The main window is divided into two panes. The left pane, titled 'School', contains a list of schools with a green circle icon next to 'Principalm High'. The right pane, titled 'Define the school information to extract', contains a description of the Schools feature and a form for configuring school information. The form has two tabs: 'Basic' and 'Photos'. The 'Basic' tab is active and contains the following fields: 'License' (Expires on 2013/07/23), 'Source' (Trillium), 'School Information' (Please select the School: Abbotsford Senior Secondary School (ASS)), 'Sheltered Students' (Don't Export checkbox checked), and 'Multiple Calendars' (Staff > 1 Cal checkbox unchecked). At the bottom of the window, there are buttons for 'Add', 'Remove', and 'Test'. The 'Test Results' section shows 'School Validated.'

School Information: here you will notice your school database and list of all schools associated to this database. For every school license (.paf) added, choose the school number/name associated.

Filter Export: Depending on your SIS configuration the filter export section will vary. Select your filter preferences and click **Test** to test your settings.

Adding Photos

Photo Folder: enter the directory to where your images are stored. If you do not wish to import photos, leave this part blank.

The screenshot shows the SIS Liberty application window. The 'Schools' tab is selected in the top navigation bar. On the left, a list of schools includes 'Principal High'. The main area is titled 'Define the school information to extract'. Below this, the 'Photos' sub-tab is active. It contains instructions and settings for photo extraction. Under 'Student Photo Settings', the 'Photo Folder' is empty, 'Identified By' is set to 'Student Number', and 'Index File' is empty. Under 'Staff Photo Settings', the 'Photo Folder' is empty, 'Identified By' is set to 'Staff Number', and 'Index File' is empty. At the bottom, there are 'Add', 'Remove', and 'Test' buttons. A 'Test Results' box shows 'School Validated.'

Identified By: select the method used to identify your photos. Choose from:

- **Student Number** – student number identifies the photos, this is most common.
- **Photo ID** – Photo ID number that has been exported from your admin system under the StdPhotoID column header.
- **State ID** – State ID number that identifies the photos

- **Index File:** An index file is used to map the photo file name to the ID# assigned to your students/staff. Do not use this file if photos do not need mapping. Click TEST to test settings.

Setting up Datasets

Dataset

- All Students

Define the groups of information

Datasets lets you tell SIS Liberty the groups of school data that will be used. Select the product provider that will be using the group of information then type in a name that describes the dataset.

Data is used by: Principal Get New Provider

Name: All Students

Check the Schools and Data Fields to include. (Checked values are included)

☒ Select All ☐ Select None ☒ Select All ☐ Select None

Licensed Schools	
<input checked="" type="checkbox"/>	Discovery Software Demo

Data Used	
<input type="checkbox"/>	Student Demographics
<input type="checkbox"/>	Student School Info
<input type="checkbox"/>	Student Contacts
<input type="checkbox"/>	Student Classes
<input type="checkbox"/>	Student Grades
<input type="checkbox"/>	Student Attendance
<input type="checkbox"/>	Student Medical
<input type="checkbox"/>	Student Conduct
<input type="checkbox"/>	Student Notes
<input type="checkbox"/>	Student Fees

Add Remove Test

Test Results
All Dataset parameters are valid.

Click **Add** to create a dataset to be used by a user or group of users

Data is used by: Choose a provider that will be using this dataset (ie; Principalm, Teacherpalm, Third-Party product)

Name: Create a name for this dataset or for the group of datasets that will be included (ie "High Schools")

Licensed Schools: Select the "Licensed School(s)" to be included in this dataset (ie: High School)

Data Used: Check the data that is to be used with this dataset. Uncheck the data to filter it (ie: High School Security may not want to see Student Medical so uncheck “Student Medical”). Repeat steps and customize for all datasets added. Click **Test** to test Dataset parameters.

Assigning Datasets to Recipients

The Recipient tab will allow you define which group or user will be receiving a dataset and where it will be sent.

Dataset: Choose a dataset created from the Dataset tab

Name: Create a name for this recipient (ie: “Security”)

Destination: Choose Discovery Update Service if data will be synced via wifi. Choose Folder Location if data will be updated from a local directory. You will be required to define these settings under the Destinations tab.

SIS Liberty

Guide Sources Schools Datasets **Recipients** Destinations Support About Run

Recipient

- Principalm - Security (No Med)

Define who will receive the information

Recipients' lets you tell SIS Liberty who will be receiving a dataset and where it will be delivered. Select the dataset you wish to send, then name the user or group receiving the dataset. Lastly select the destination where the dataset should be sent.

Dataset: Principalm - Security (No Med)

Name: Principalm - Security (No Med)

Destination: Discovery Update Service

Principalm Configuration

Enter the password used to encrypt the recipient data. Then re-enter to confirm.

Password:

Confirm:

Security Settings

Enter min password length, login attempts and which failed action to use. Lockout mins are used if failed action is suspend.

Password Length: 4

Attempts: 3

Failed Action: Do Nothing

Lockout Mins: 1

Test Results: All Recipient parameters are valid.

Principalm Configuration: Enter a password to be used with the recipient data, then re-enter to confirm.

Security Settings: Set handheld security settings; enter the minimum *Password Length* (4-16 characters); login *Attempts* (number of times a user can try to login before the selected action will occur); which *Failed Action* to use.

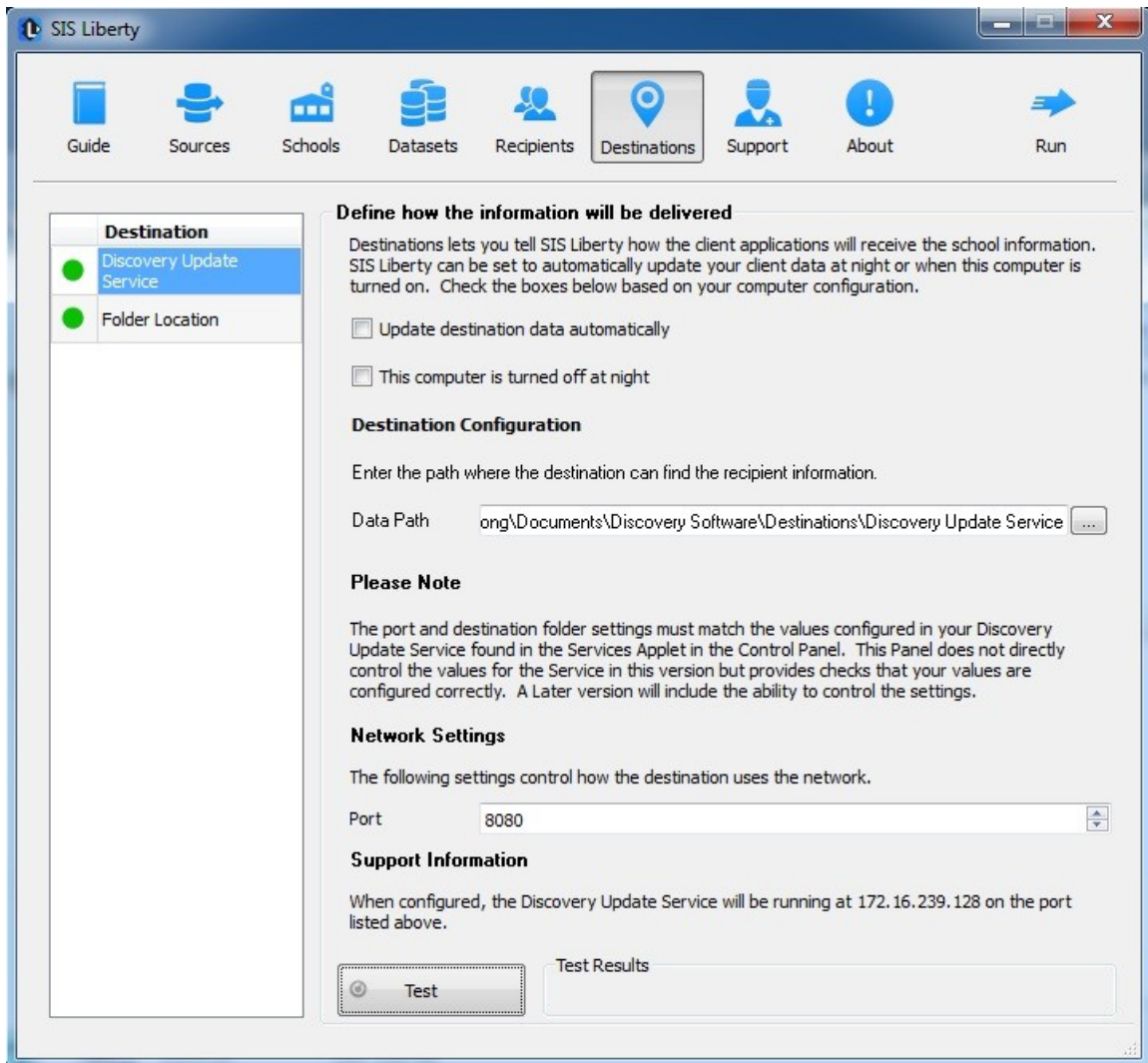
Failed Actions available are:

- Do Nothing: after X failed attempts the Principalm application will do nothing (ie the user can continue to try passwords as many times as they want) (Least Secure).
- Suspend: after X login attempts the Principalm app will delay a # of Minutes equal to *Lockout Mins*, until the user is allowed to

try to login again.
Destroy: after X login attempts the Principalm app will destroy the data on this device. Thereby making this dataset unavailable until it is reloaded onto this device.

Assigning a Destination path

Here you will define where all of the information configured in the previous tabs will be delivered.



If **Discovery Update Service** is selected a default data path will automatically be entered in. This is the directory to where the *recipient* will retrieve their dataset.

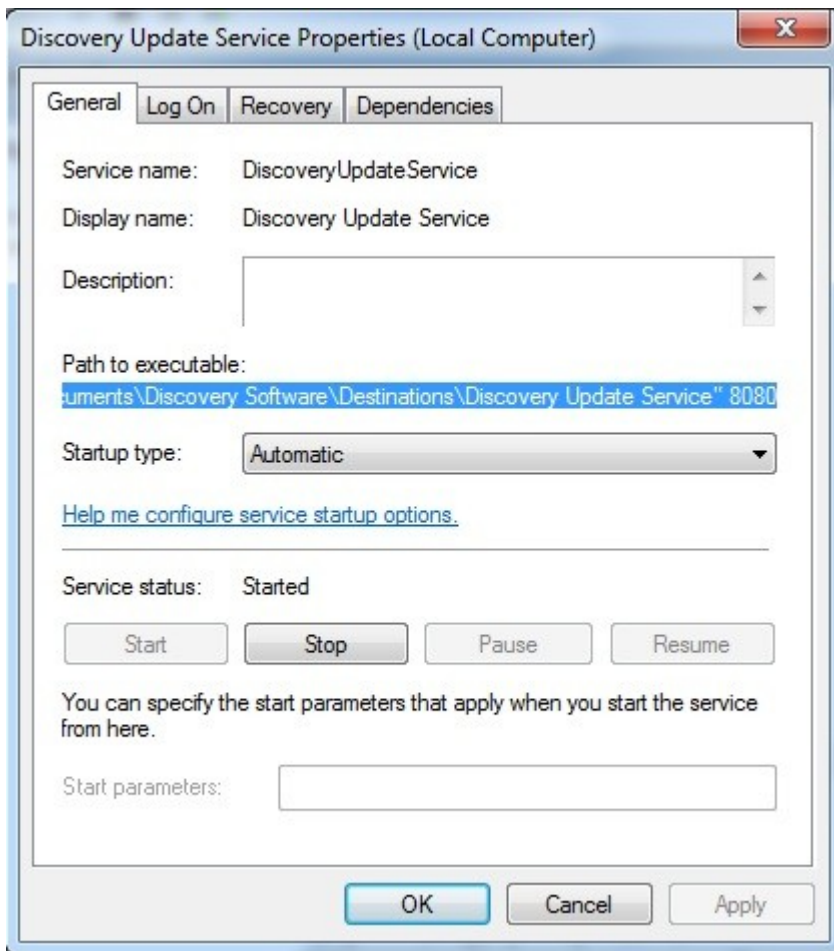
Network Settings: Port: 8080 will be entered in by default. If you do not use port 8080 change this port accordingly.

If parameters are not set correctly, you may access the Services applet to confirm that “Discovery Update Service” was installed correctly.

The Services applet can be found by accessing:
Start > Control Panel > Administrative Tools > Services

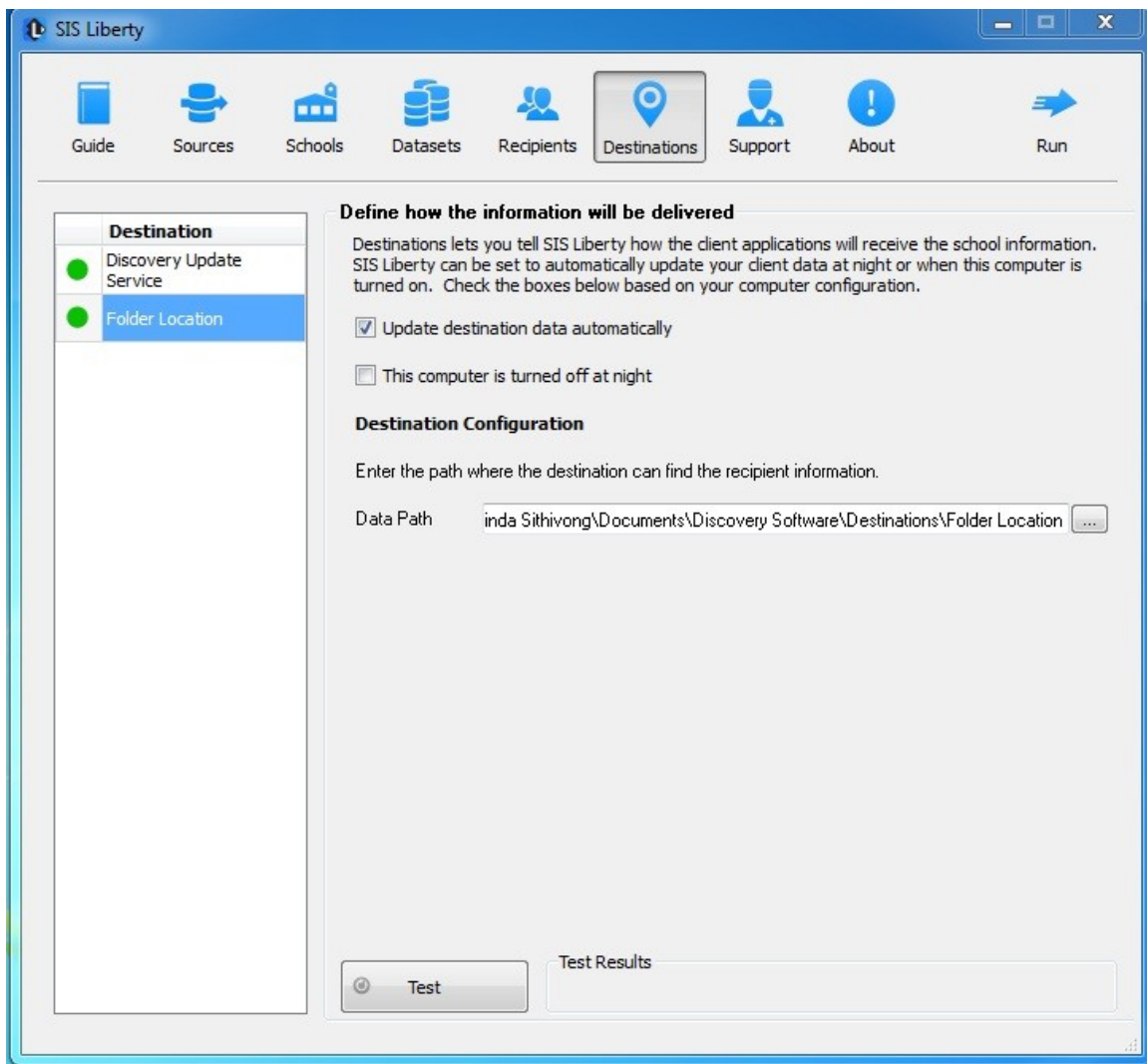
Locate Discovery Update Service and check to see if the service has started. If not click Start service. To view properties, right click and

choose Properties.



The "Path to executable", this is the directory to the Discovery Update Service, the Port will be listed at the end of this path.

If **Local Folder** is selected, choose the directory to where the dataset is to be sent.



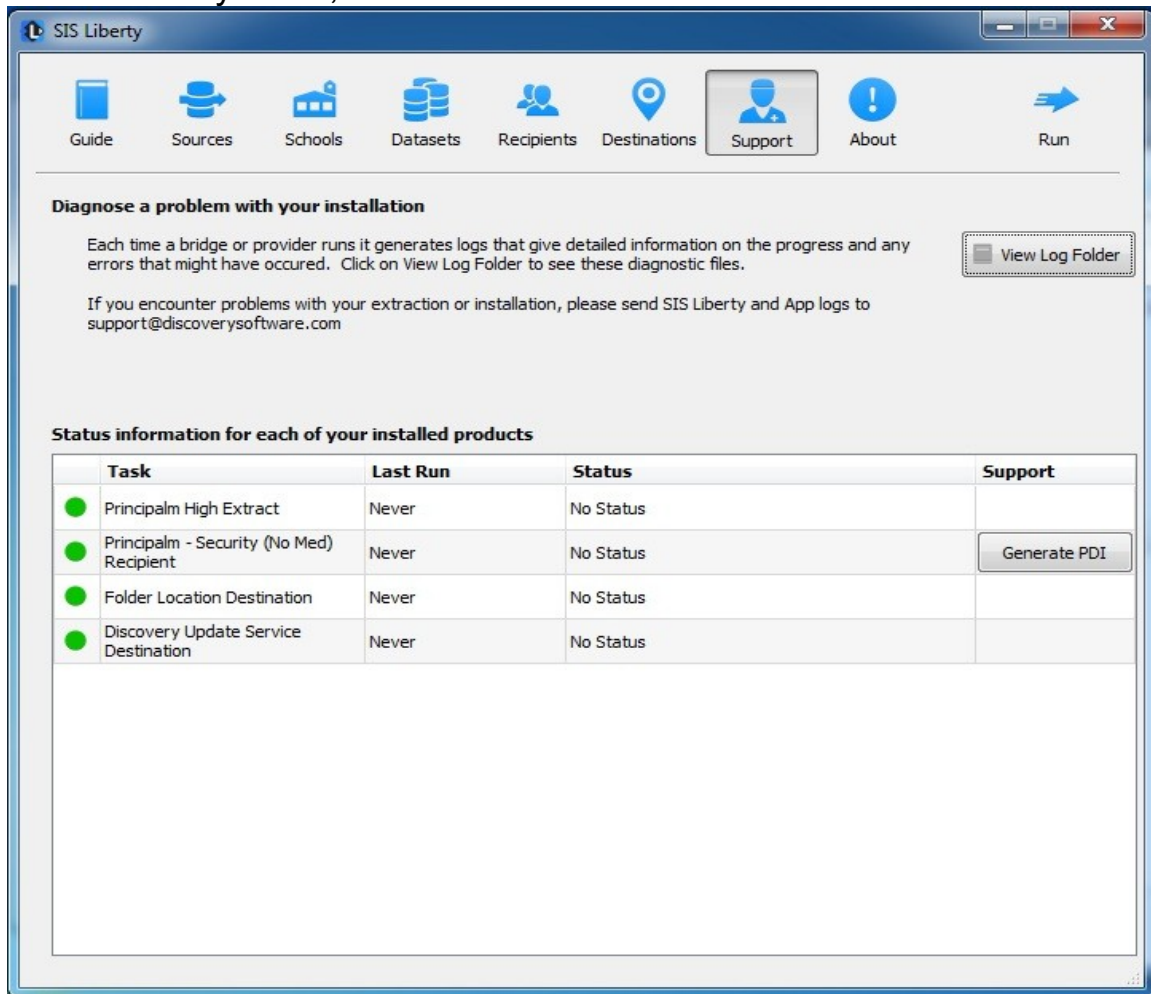
If data will be transferred directly to a device, connect your device via USB then point the **Data Path** to a folder path on the device. You may also direct the **Data Path** to a local directory on your computer then use Drag and Drop method to copy the dataset files directly over to the device.

To schedule the updates to run automatically via Scheduled Task, check the box next to “update destination dataset automatically”. If this machine is logged off or shut down at night, check the box next to “This computer is turned off at night” this will run the task at start up.

Troubleshooting & Support

Diagnose a problem with your installation. Detailed logs generated by the bridge or provider is available by clicking the **View Log Folder** button. Bridge logs will be stored in a subfolder under the schools name. A new log is generated for each date the extract is run and will be available in proprietary mode. If you require assistance decoding this log or understanding it, please contact Discovery Support at support@discoverysoftware.com

Status information for each of your installed products is also available here. View by **Task**, **Last Run** and **Status**



The screenshot shows the SIS Liberty application window. The top navigation bar includes icons for Guide, Sources, Schools, Datasets, Recipients, Destinations, Support (highlighted), About, and Run. The main content area is titled "Diagnose a problem with your installation" and contains instructions on how to use logs and a "View Log Folder" button. Below this is a section titled "Status information for each of your installed products" which contains a table with columns for Task, Last Run, Status, and Support.

Task	Last Run	Status	Support
Principal High Extract	Never	No Status	
Principal - Security (No Med) Recipient	Never	No Status	Generate PDI
Folder Location Destination	Never	No Status	
Discovery Update Service Destination	Never	No Status	

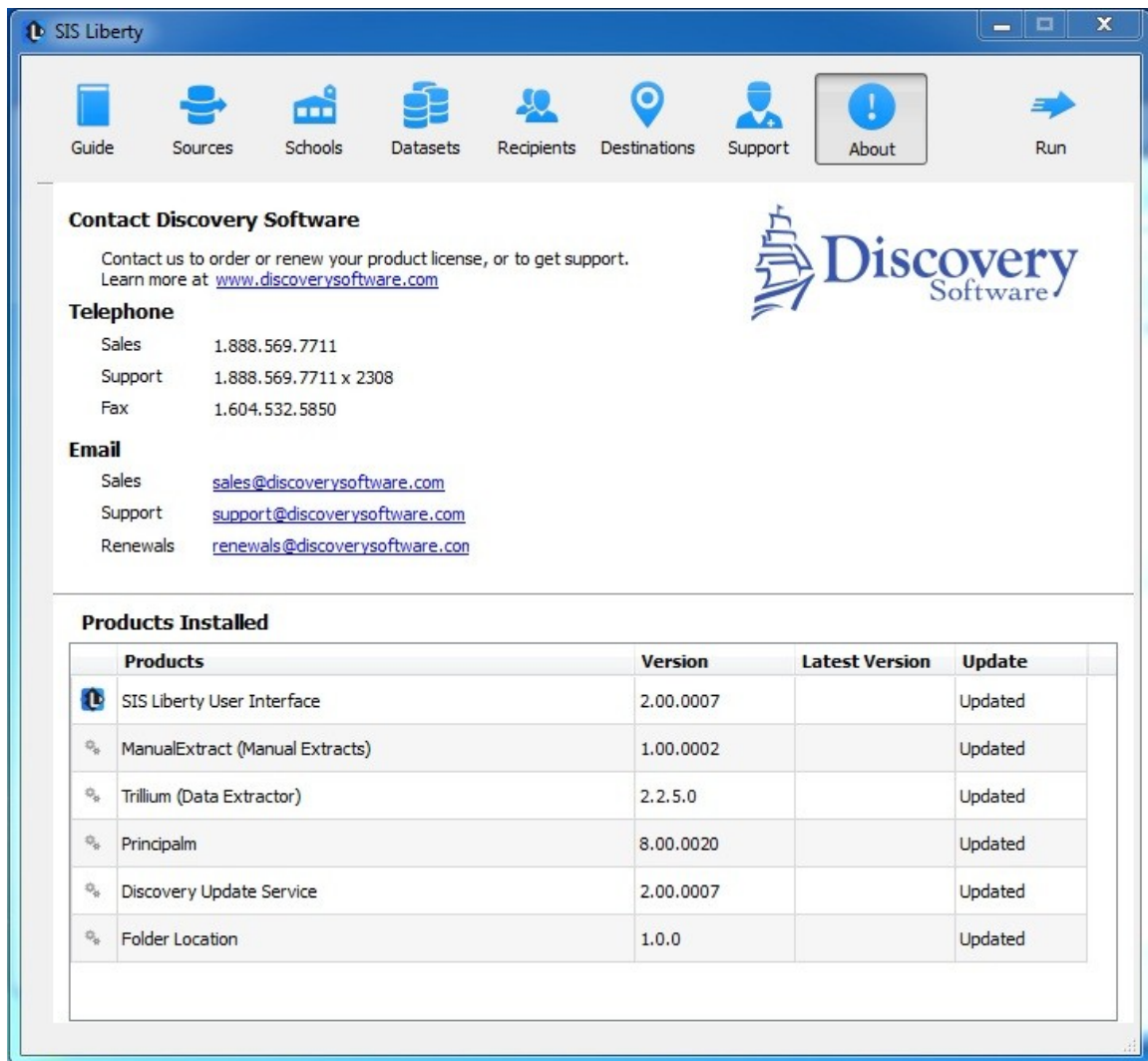
To generate diagnostic data click the “Generate PDI” button next to each Recipient dataset. A compressed diagnostic folder containing a scrambled version of your data and the logs will be generated in the support folder ie: C:\Users\discovery\Documents\Discovery Software\Support\Recipients\Default_User.zip. This file can be emailed to Discovery Support for further troubleshooting.

Contact Us

Our Support team is available to assist you with setup and installation free of charge. Please contact **Discovery Support** if you would like to schedule a call.

Our Sales team is available to assist you with a demo or trial license, please contact **Discovery Sales** for more information.

If you are an existing customer looking to renew, extend or change your current license, please contact **Discovery Care**.



The screenshot shows the SIS Liberty software interface. At the top is a navigation bar with icons for Guide, Sources, Schools, Datasets, Recipients, Destinations, Support, About, and a Run button. The main content area is divided into two sections. The top section, titled 'Contact Discovery Software', provides contact information for Sales, Support, and Renewals, along with a telephone and email list. The bottom section, titled 'Products Installed', contains a table listing the installed products, their versions, and the latest available versions.

Contact Discovery Software

Contact us to order or renew your product license, or to get support.
Learn more at www.discoverysoftware.com







Telephone

Sales	1.888.569.7711
Support	1.888.569.7711 x 2308
Fax	1.604.532.5850

Email

Sales	sales@discoverysoftware.com
Support	support@discoverysoftware.com
Renewals	renewals@discoverysoftware.com

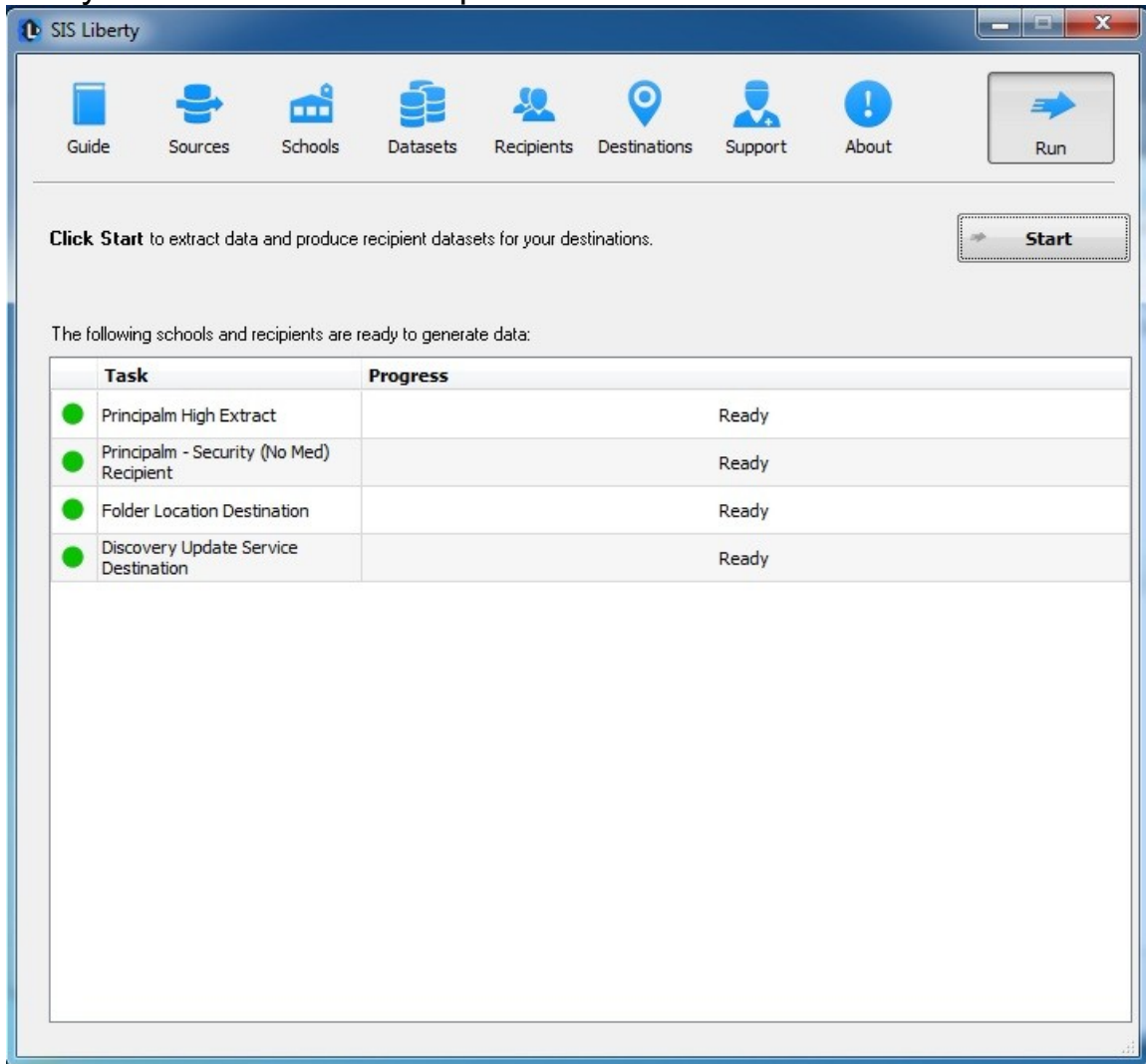
Products Installed

Products	Version	Latest Version	Update
 SIS Liberty User Interface	2.00.0007		Updated
 ManualExtract (Manual Extracts)	1.00.0002		Updated
 Trillium (Data Extractor)	2.2.5.0		Updated
 Principalm	8.00.0020		Updated
 Discovery Update Service	2.00.0007		Updated
 Folder Location	1.0.0		Updated

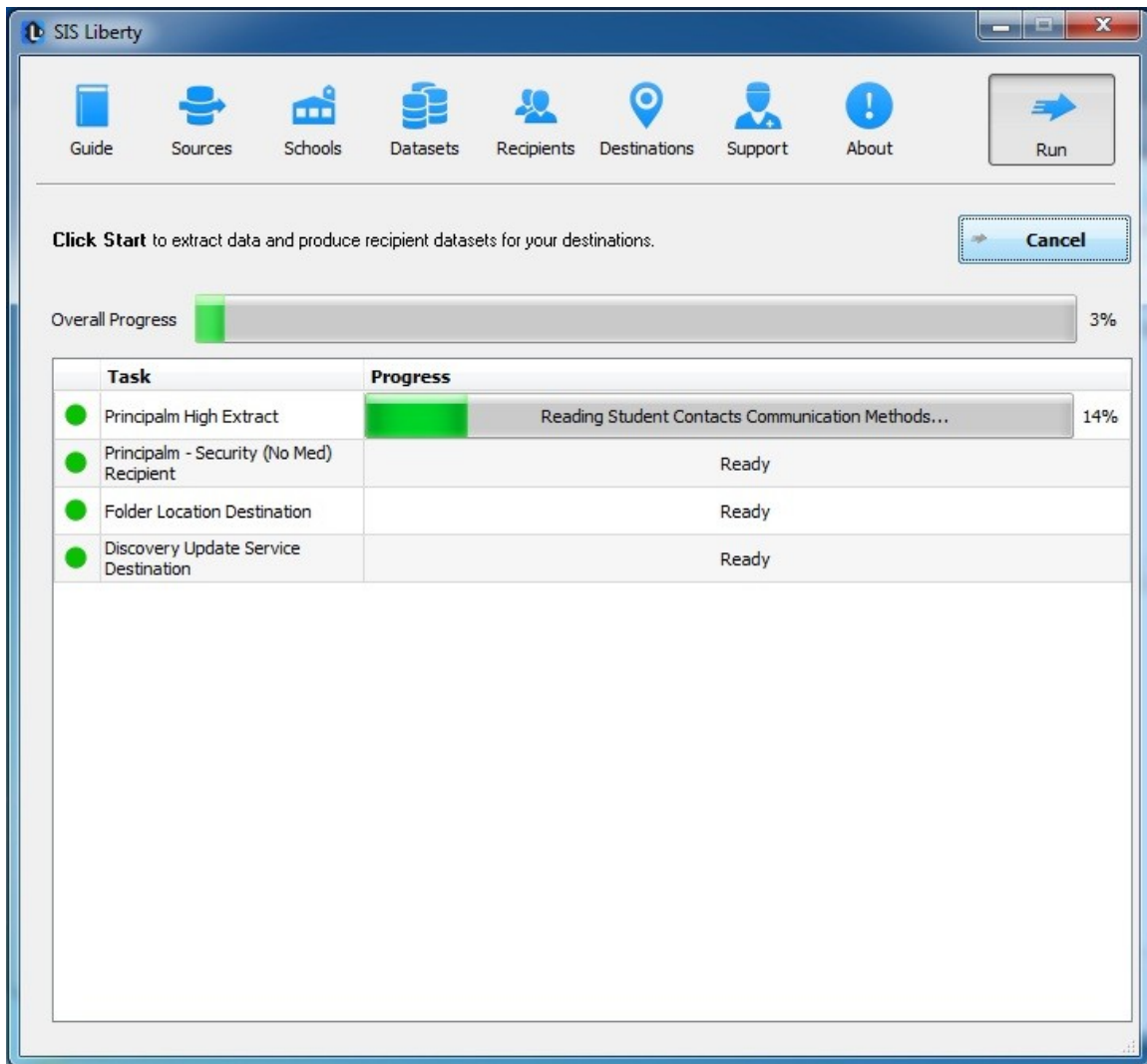
Update Data

Run

Click the “Run” button to confirm that all schools and recipients are ready to be extracted and updated.



Then click the **Start** button to begin school data extracts with the recipient updates to follow



What is happening?

School Extract Run: Data is being exported from the SIS to the “School Data” directory. If Manual Extract was selected, data is being copied from the Export Folder directory (set up under Sources) over to the School Data directory (C:\Users\[user]\Documents\Discovery Software\School Data)

Recipient Run: Data is being copied from the “School Data” directory then encrypted into the **Destination** directory to be retrieved by the recipient.

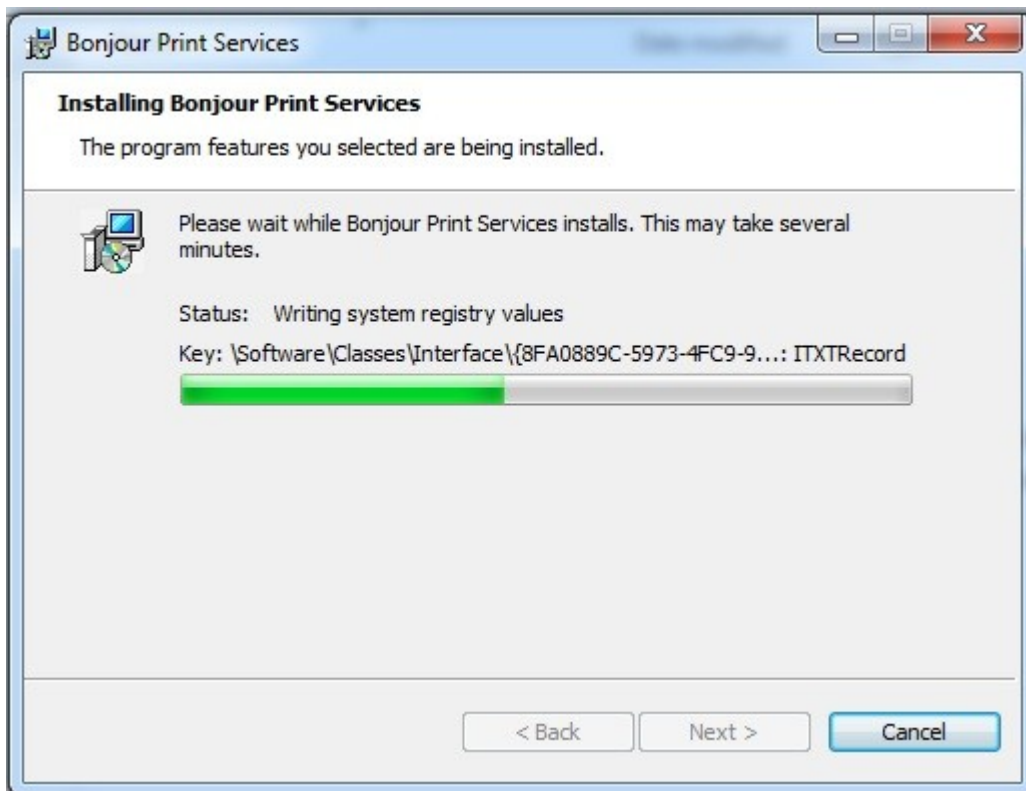
Bonjour Installation

Bonjour Service is optional and is used to locate the ip address of the computer (where the datasets reside). Without Bonjour you will need to enter your remote ip address manually

Click **Download** then **Run** to begin the installation wizard



Click **Next** to begin installation



Click **Finish** to complete installation



To retrieve Recipient files, enter the ip address in your browser or provider product. All Recipient folders will be listed here. Choose your Recipient folder to access your dataset.

Secure web-servers are also supported if you have a secure web-server already set up such as IIS.