



# SchoolMint Enroll

**Export Excellence:  
SIS Export Preparation**



# Meet the Hosts



**Alexis Robin**  
Sr. Professional Services Specialist  
Presenter



**Priscilla Perkis**  
Implementation Specialist  
Q&A



# Logistics

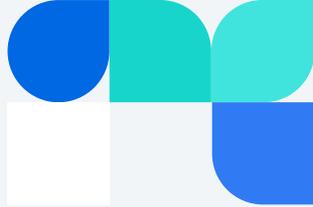


Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end:

- Ask webinar related questions throughout by clicking **Q&A**
- Send site-specific questions to [schoolmint.zendesk.com](https://schoolmint.zendesk.com)

Two Surveys at the end



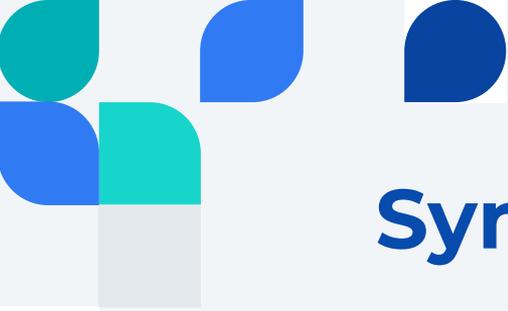
## Today's Goals

- Sync Service tool
- Mapping types
- Sync Service Reports



# Sync Service Feature





# Sync Service in SchoolMint

The Sync Service tool is a powerful tool that gives organizations control over and insight into their data connections with Enroll. Sync Service is used to import and export student data using an API through the organization's existing SIS provider, an SFTP connection, or through one-time (ad-hoc) imports.

This tool also allows the organization's team to quickly and easily update data mappings, identify issues, and more.

The Sync Service tool is a top feature for organizations and SchoolMint since it allows us to bypass developer/engineering intervention which makes getting this setup and resolving issues more efficient and much much faster.





**Poll: Syncing is all about matching fields.  
Let's test your skills! Which pair is your  
favorite match?**

- A. Peanut butter and jelly**
  - B. Batman and Robin**
  - C. Salt and pepper**
  - D. Cookies and milk**
- 

# Accessing Sync Service



# Enable Sync Service Imports

Settings >> General

## Parent Settings

Allow Parents to Withdraw Applications on their Dashboard

## Dynamic Views and Reports

Use Human Readable Values [i](#)

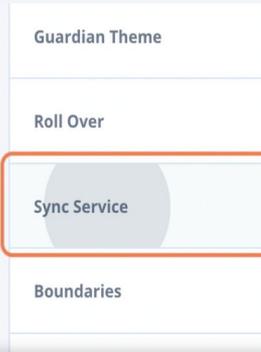
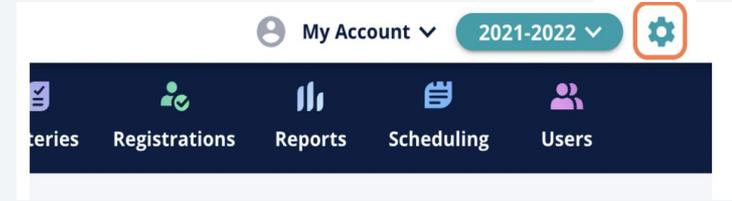
## Sync Service

Enable Sync Import for Year 2023

# Accessing Sync Service

## Settings >> Sync Service >> Sync Service Login

- Navigate to settings
- Select Sync Service from the left hand menu
- Select 'Sync Service Login'



### Sync Service

Log in to manage your SIS connections and field mapping/transformations. Then return to this page to schedule nightly imports and exports.

[Sync Service Login](#)

# Sync Service Dashboard

The dashboard has different navigation options that you can utilize

Brings you to  
Enroll User Guide



Takes you back to  
sync service  
dashboard

## READ Academies Sync Connections

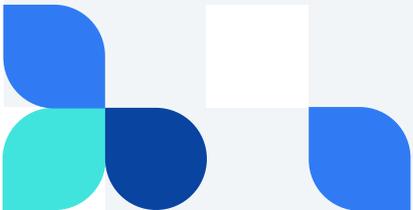
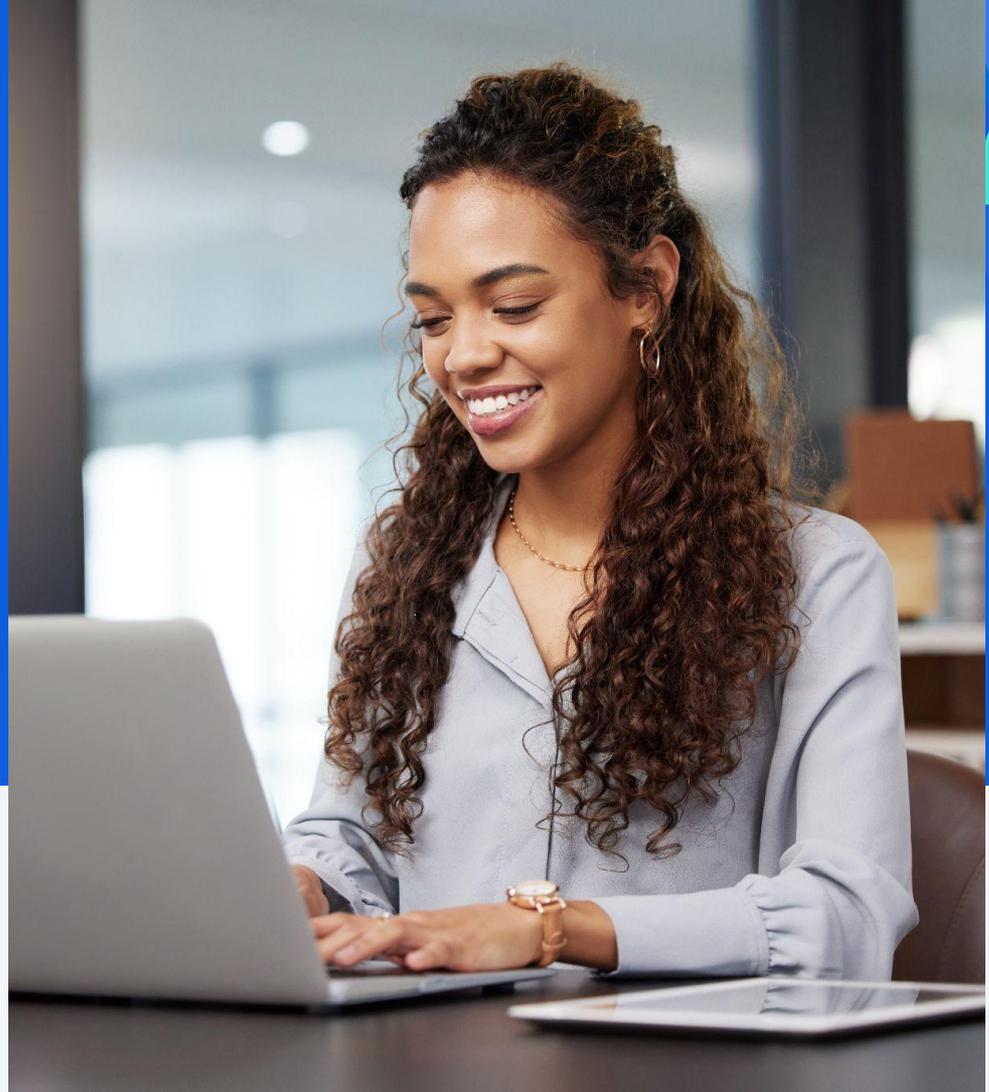
Create or manage sync connections to sync data between SchoolMint Enroll and other systems.

Add Sync Connection

Click to add a new  
sync connection

Takes you back to  
Enroll

# Creating a Connection



# Connection Types

## Ad Hoc

Allows for a manual one time import or export that can be run immediately.

## SFTP

Secure File Transfer Protocol. The organization and SchoolMint can both access in order to store secure files. Can be scheduled.

## API

Application Programming Interface. Only compatible with PowerSchool, Aeries, and certain versions of Skyward and will allow for a direct import or export.

## Sync Connection

Configure a sync connection to import student or application data into SchoolMint Enroll, or to export registrations from SchoolMint Enroll.

Name \*

Test Connection

Select Connection Type \*

|

Ad hoc CSV

Aeries

PowerSchool

SFTP

Skyward

# Ad Hoc Connection

## To create a CSV connection, choose “Ad Hoc CSV” in the API list.

Once you click “Connect”, you will be taken to the next screen to begin configuring your connection. You can do the following Ad Hoc Imports/Exports

- Import Admin Users
- Import Applications
- Import Cutoff Numbers
- Import Programs
- Import Schools
- Import Students
- Export Students
- Import Seat Tracker Mapping

## Sync Connection

Configure a sync connection to import student or application data into SchoolMint Enroll, or to export registrations from SchoolMint Enroll.

Select Connection Type \*

Ad hoc CSV

Connect

Import Admin User Mapping

Import Application Mapping

Import Cutoff Mapping

Import Program Mapping

Import School Mapping

Import Student Mapping

Export Student Mapping

Import Seat Tracker Ma... ▾

All Connections

### CSV Ad Hoc Connection

Ad Hoc CSV Connection

#### Import Admin User Mapping

SchoolMint Field Codes

CONFIGURE FIELD MAPPING Save

Configure your Connection

No File Chosen

Upload CSV File

Admin User Email Field \*

Admin User First Name Field \*

Admin User Last Name Field \*

Admin User Examples

Admin User Email - 1

Admin User Email - 2

Admin User Email - 3

Admin User Email - 4

Admin User Email - 5

## Ad Hoc Import Instructions

**Admin Import**

**Application Import**

**Cutoff Number Import**

**School Import**

**Student Import**

**Seat Tracker Import**

**Program Import**

# Complete an Ad Hoc Sync

1

Click the 3 dots on your Sync Connection

**CSV Ad Hoc Connection**  
*Ad hoc CSV Connection*

Sandbox **Production**

Enable Export

Enable Import

**Configure Mapping**

2

Choose the type of import/export you are completing

**CSV Ad Hoc Connection**  
*Ad hoc CSV Connection*

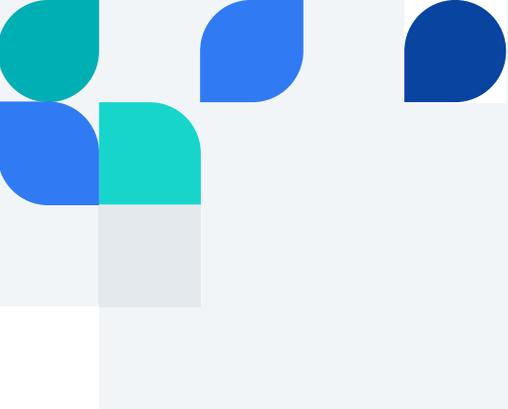
Sandbox **Production**

Enable Export

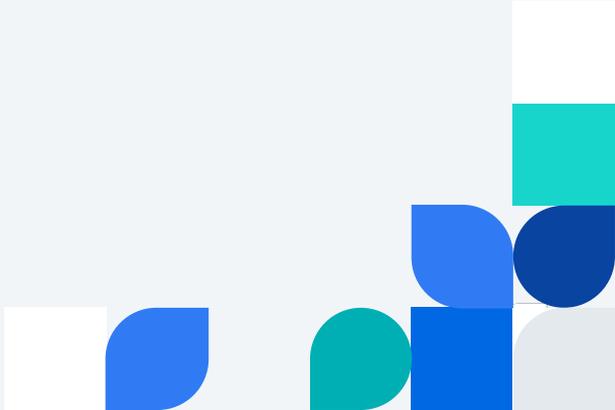
Enable Import

**Configure Mapping**

- Edit
- Generate Students CSV
- Download Students CSV
- Import Admin Users
- Import Applications
- Complete Pending Application Sync
- Import Cutoffs
- Import Programs
- Import Schools
- Import Students**
- Complete Pending Student Sync
- Import Seat Tracker Capacity and Return...
- Sync Logs: Import Admin Users
- Sync Logs: Import Application
- Sync Logs: Import Cutoff
- Sync Logs: Import Program
- Sync Logs: Import School
- Sync Logs: Export Student
- Sync Logs: Import Student
- Sync Logs: Seat Tracker Capacity and Ret...
- Delete



# SFTP Connection



## With an SFTP, SchoolMint creates the connection for the org, and provides the org with credentials

Select the connection(s) you'd like to open, and enter the credentials

- sftp.schoolmint.com
- /SISData
- SFTP Username (enrollwebinardemo)
- SFTP Password (RqJRCr3nTT1hWSAz)

Set Up Sandbox Sync

Set Up Production Sync

### Sandbox

This is the connection information for where your sandbox instance of SchoolMint Enroll should sync.

SFTP Address \*

SFTP Path

SFTP Username \*

SFTP Password \*



### Production

This is the connection information for where your LIVE, production instance of SchoolMint Enroll should sync

SFTP Address \*

SFTP Path

SFTP Username \*

SFTP Password \*



Connect

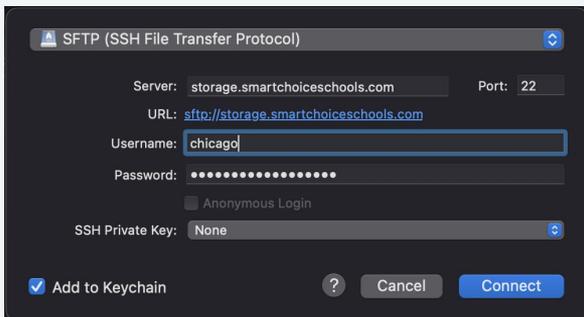
# Setting Up an SFTP

1

Download [Cyberduck](#) or FileZilla

2

Login to the Connection on Cyberduck



SFTP (SSH File Transfer Protocol)

Server:  Port:

URL:

Username:

Password:

Anonymous Login

SSH Private Key:

Add to Keychain

3

In /SISData folder, add one folder for exports & one for imports

4

Go to the SM Enroll site's Sync Service Login

5

Create your connection with login credentials



SFTP Address \*

SFTP Path

SFTP Username \*

SFTP Password \*

## SFTP Export Configuration Settings

New File

### Example SchoolMint Export

#### File Settings

File Name \*  
Example

File Extension \*  
csv

Field Separator \*  
Comma

Text Identifier \*  
"Double Quo...



Ensure the File Extension is CSV

Field Separator should be  
Comma

# Schedule Syncing: SFTP

**Schedule Import: Students**

Enable the scheduling of automatic nightly imports for API and SFTP connections.

Time of Day  

Central Time

**Save**

**NOTE: This is only available for SFTP imports and exports, and Seat Tracker**

1. Navigate to your Settings module
2. Go to the Sync Service Tab
3. Toggle on the **Schedule** button to enable the scheduling of Imports and/or Exports
4. Set the time of day you want the files to be imported/exported
5. Save

# Schedule Syncing: Reports



### Schedule Daily Export

Download Export as CSV

Time of Day  
12:00 AM

Central Time

Download to SFTP  
SFTP Connection

Save

**NOTE: This is only available for SFTP exports**

1. Navigate to your Reports module
2. Click Edit or Run on the report you want to use
3. Click Schedule Daily Export
4. Set the time of day you want the report to be exported
5. Select the SFTP Connection you want to send it to
6. Click Save
7. Configure the report as needed

# API Connection

Set Up Sandbox Sync  Set Up Production Sync

### SchoolMint Plugin for PowerSchool

Download and install the SchoolMint plugin for PowerSchool to get the Client ID and Client Secret needed for PowerSchool integration. [View instructions](#).

 Download the SchoolMint Plugin for PowerSchool

#### Sandbox

This is the connection information for where your sandbox instance of SchoolMint Enroll should sync.

URL \*  
https://powerlabs15.powerschool.com

Client ID \*  
b0813e44-a3ad-4b31-9607-310ac93f8122

Client Secret \*  
..... 

#### Production

This is the connection information for where your LIVE, production instance of SchoolMint Enroll should sync.

URL \*

Client ID \*

Client Secret \* 

**Connect**

# PowerSchool API

Select the connection(s) you'd like to open, and Enter the credentials for your PowerSchool site(s) to sync data

- URL
- Client ID
- Client Secret

Set Up Sandbox Sync     Set Up Production Sync

[View instructions](#) to set up a Sync connection with your SIS.

**Sandbox**

This is the connection information for where your sandbox instance of SchoolMint Enroll should sync.

Aeries Certificate \*

OneRoster URL \*

OneRoster Consumer ID \*

One Roster Consumer Secret Key \*

**Production**

This is the connection information for where your LIVE, production instance of SchoolMint Enroll should sync

Aeries Certificate \*

OneRoster URL \*

OneRoster Consumer ID \*

One Roster Consumer Secret Key \*

Connect

# Aeries API

Select the connection(s) you'd like to open, and Enter the credentials for your Aeries site(s) to sync data

- Certificate
- URL
- OneRoster Consumer ID
- OneRoster Consumer Secret Key

Set Up Sandbox Sync     Set Up Production Sync

[View instructions](#) to set up a Sync connection with your SIS.

### Sandbox

This is the connection information for where your sandbox instance of SchoolMint Enroll should sync.

URL \*

User \*

Password \* 

Create a State Specific Mapping: ⓘ

Select a State 

### Production

This is the connection information for where your LIVE, production instance of SchoolMint Enroll should sync.

URL \*

User \*

Password \* 

Create a State Specific Mapping: ⓘ

Select a State 

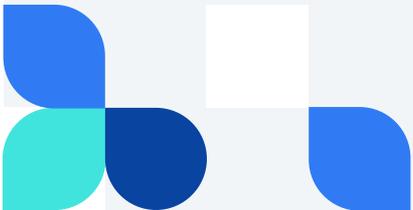
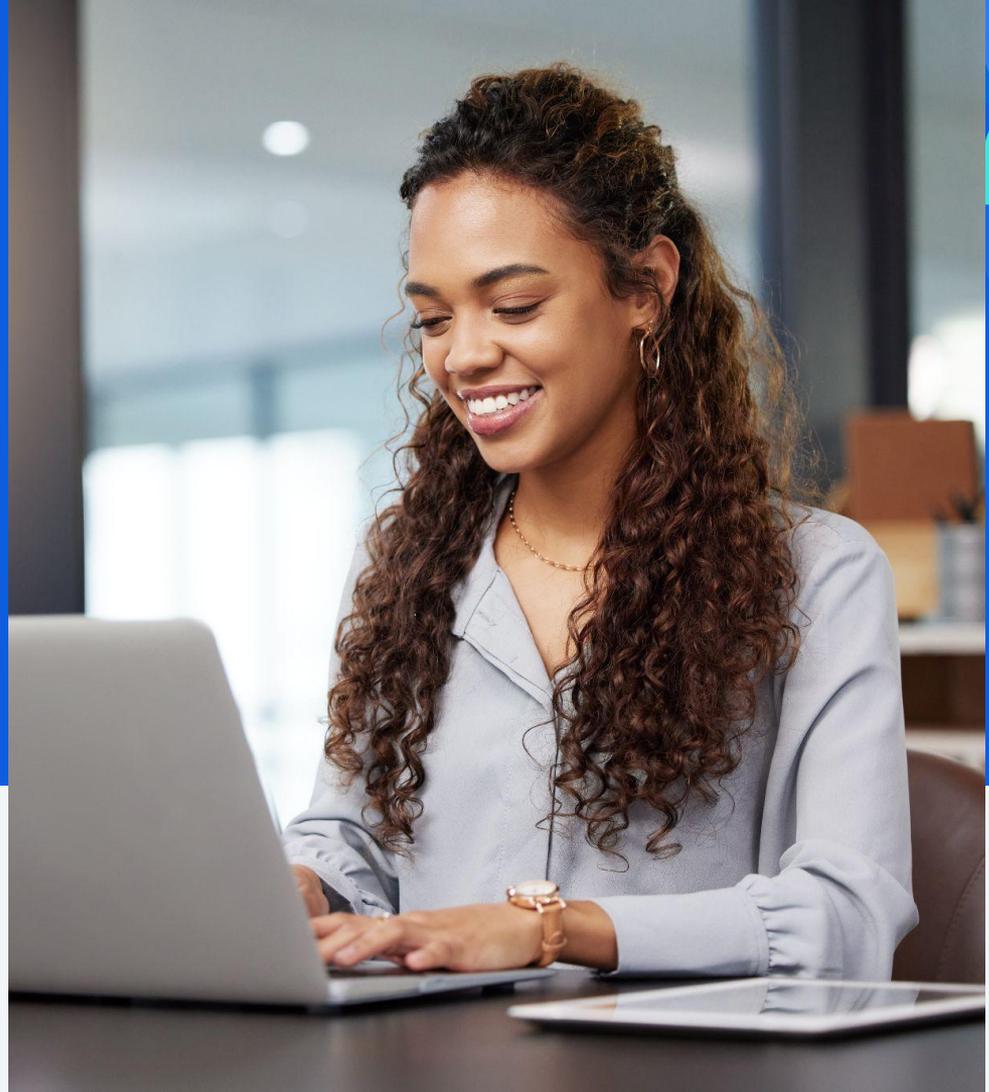
Connect

# Skyward API

**NOTE:** All Skyward Qmlativ customers with an API connection in Enroll Sync Service will need to complete some additional steps after the April 23rd Enroll 2.3 release.

**CLICK HERE:  
Access More Details**

# Setting the Connection



## Individual Connections

To set individual connections, navigate to:  
**Settings >> Schools/Programs >> Manage Schools >> Edit**

## Bulk Update Connections

To bulk update connections, navigate to:  
**Settings >> Schools/Programs >> Manage Schools**

Select all of the schools you'd like to configure the connection. Select Bulk Actions>Set Sync Connection

PRIMARY SCHOOL ELIGIBILITY REGISTRATION SETTINGS FEEDER SCHOOLS

School Name \*  
Bree Kindergarten

School Group \*  
LOTR School District

School Code \*  
6

School Level \*  
PreK thru Elementary School

Abbreviation  
BK

Sync Connection  
CSV Ad-Hoc Connection

Address \*  
2595 Veterans Ave.

Address 2

City \*  
Hammond

State \*  
LA

Zip Code \*  
70403

Cancel Save School

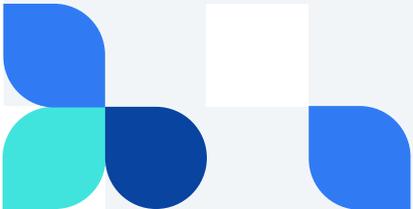
Bulk Action

- Set Registration Form
- Set Eligibility Rules/Restrictions
- Set Sync Connection

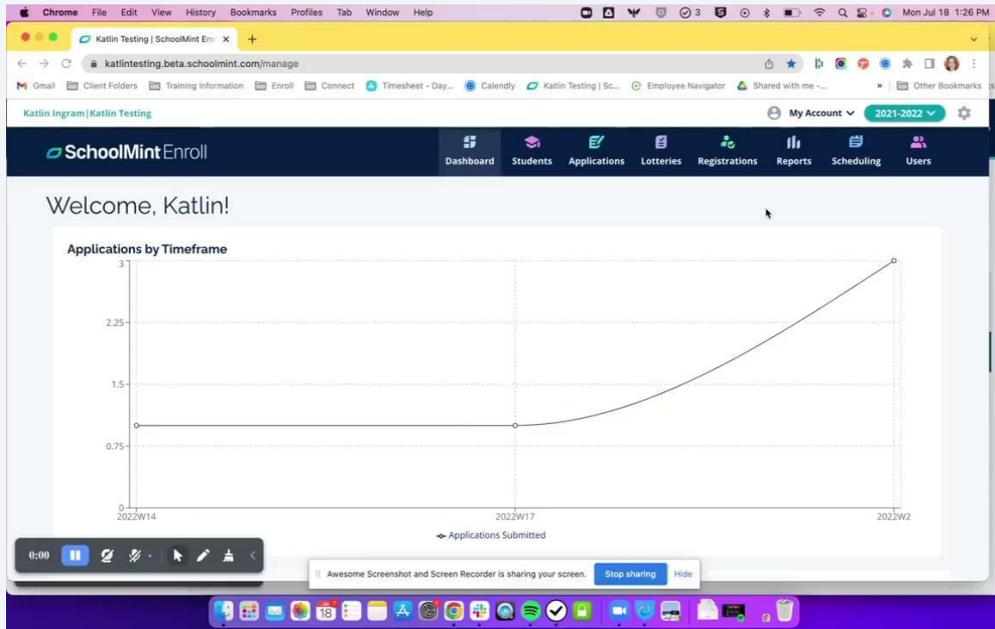
Search Schools All Groups All School Levels

	Level	Actions
<input type="checkbox"/>	PreK thru Elementary Sch...	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	5 Gondor Junior High School Middle School	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	7 Isengard Elementary Elementary School	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	2 Mt. Doom High School High School	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	100 Newton PreK thru Elementary Sch...	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	3 Rivendell High School High School	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable
<input checked="" type="checkbox"/>	1 Rohan Junior High School Middle School	<input type="checkbox"/> View Programs <input type="checkbox"/> Disable

# Syncing Students



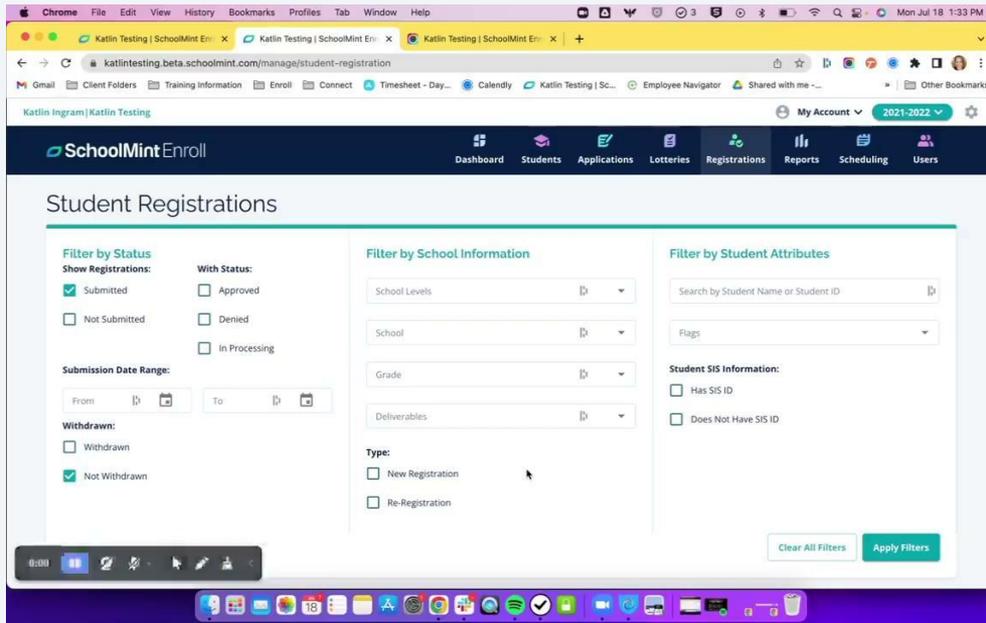
# Individual Syncing



**NOTE: Only approved registrations will be available to be synced**

1. Search for the student to sync using either the 'Students' or 'Registration' modules.
2. Edit Registration
3. Select the green 'Sync to SIS' button

# Bulk Syncing



**NOTE: Only approved registrations will be available to be synced**

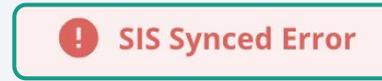
1. Navigate to your registration module
2. Filter for all registrations to sync
3. Select all accounts that should be synced
4. Click 'Bulk Action' and select 'Sync to SIS'
5. Confirm the sync
6. Check sync logs in sync service dashboard for the sync status of each account

# Sync Reports



## While processing student registrations, you may notice that some have a Sync Status of “Partial Sync” or “Failed”

Sync Status	Last Sync
Partial Sync	2023-07-26 05:02:05
Failed	2023-09-14 14:43:25



## You can use a standard report to pull more details

1. Use the menus below to find and select a field to display in this report.

Data Model \*  
Registration

Select Field \*  
sis

2. How would you like this field labeled in the report?

Field Label \*

sis\_error  
sis\_export\_status  
sis\_export\_timestamp

# Sync Service Dashboard

You can also access the Sync Service Dashboard to pull more sync status reports

The screenshot displays the SchoolMint Sync dashboard for 'READ Academies - 2024-2025'. The top navigation bar includes the SchoolMint Sync logo, the current organization and year, and links for 'Sync Logs', 'Back to SchoolMint Enroll', and 'Help'. The main content area is titled 'READ Academies Sync Connections' and includes a sub-header 'Create or manage sync connections to sync data between SchoolMint Enroll and other systems.' Below this is an 'Add Sync Connection' button. An orange arrow points from a blue callout box to the 'Sync Logs' dropdown menu, which is open and lists various log types: Admin Users Import Logs, Application Import Logs, Cutoff Import Logs, Program Import Logs, School Import Logs, Student Import Logs, Student Export Logs, and Seat Tracker Capacity and Returning Student Numbers Logs.

**SchoolMint Sync** READ Academies - 2024-2025 Sync Logs ^ Back to SchoolMint Enroll Help

## READ Academies Sync Connections

Create or manage sync connections to sync data between SchoolMint Enroll and other systems.

[Add Sync Connection](#)

**Review the Sync Status Reports for Imports/Exports**

- Admin Users Import Logs
- Application Import Logs
- Cutoff Import Logs
- Program Import Logs
- School Import Logs
- Student Import Logs
- Student Export Logs
- Seat Tracker Capacity and Returning Student Numbers Logs

# In your Sync Logs, you can filter for specific data or statuses to find the students you want to troubleshoot.

You can then either hover over the Sync Status, or download a CSV of the students to determine what caused the error

The screenshot displays the SchoolMint Sync Logs interface. At the top, a summary dashboard shows counts for different sync statuses: 0 PENDING, 0 IN PROGRESS, 1 FAILED, 419 PARTIAL SYNC, and 0 SUCCEEDED. Below this is a 'Filter By:' section with search fields for Student Name, Connection Name, and Error Code. There are also dropdown menus for Registration ID, Student ID, and Sync Status (currently showing 'Partial Sync' and 'Failed'). Date range pickers are present for filtering by date. A 'Download CSV' button is located on the left, and 'Clear All Filters' and 'Apply Filters' buttons are on the right. The main table lists sync records with columns for Sync ID, Registration ID, Student ID, Connection Name, Record Name, Date, and Status.

Sync ID	Registration ID	Student ID	Connection Name	Record Name	Date	Status
6423442	25158	3681564	PowerSchool	Cyan David Centeno	2023-07-08 03:40:19	FAILED
6423445	25237	3681235	PowerSchool	Adan Munoz	2023-07-26 05:02:44	PARTIAL SYNC

# Example Errors

In the example below, we can see that PowerSchool has a character limit for the Doctor Name field. To resolve, an admin can go in and update their data, and add a text limit on the Doctor Name SchoolMint Enroll field to avoid future issues similar to this one

Thrive PowerSchool	Micah Valencia	2023-07-18 15:03:58	FAILED
Thrive PowerSchool	Theodor Morris	2023-07-18 15:03:58	FAILED
Thrive PowerSchool	Sophia Guerrero	2023-07-19 18:13:00	FAILED
Thrive PowerSchool	Ediel Cruz-Perea	2023-09-06 15:08:42	FAILED

```
{  
  "error": {"student/contact/doctor_name":  
    ["FIELD_VALIDATION_ERROR", "Value may not  
    contain more than 60  
    character(s)."], "message": "Unable to update  
    student in PowerSchool Instance"}  
}
```

```
\\d{4}|^$)","alerts.medical.expires_date":["Does  
not match the regex pattern (\\d{4}\\-\\d{1,2}\\-  
\\d{1,2}|^$)","initial_enrollment.district_entry_d  
ate":["Does not match the regex pattern  
(\\d{4}\\-\\d{1,2}\\-
```

In this example, we can see that the date field format needs to be updated for the Medical Expires Date and District Entry Date fields in the mapping configurations. PowerSchool typically collects date in a *mm/dd/yyyy* format

# Q&A

## Survey



# Q&A

**Q:** If we see failed in API import status but at the same time I find the student when I search under students. Do I still need to do anything with that failed status? And if it's an overnight update, shall I wait?

**A:** If a student is showing as failed in the import, you will still want to check to ensure that there are not any issues that are causing a failed *update*, even if you are seeing the student as existing on your module

# SIS Mapping Configurations

- Understand the intricacies of School Information System (SIS) mapping configurations.
- Learn how to optimize SIS integration for smoother data flow.
- Gain insights into common challenges and effective solutions

May 2, 2024

[Click Here to Register](#)

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# **Admin Resources**

**THANK YOU!**

