



SchoolMint Enroll

Meet the Hosts



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Q&A



Sync Service Imports Agenda

1. Accessing sync service
2. Creating a connection
3. Mappings
4. Scheduling imports
5. Troubleshooting

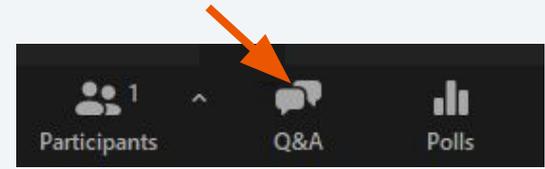
Logistics



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

Live Q&A throughout:

- Ask webinar related questions by clicking **Q&A**
- Send site-specific questions to schoolmint.zendesk.com



Two Surveys at the end

Accessing Sync Service



User Group Access

Users > User Groups > Edit

- Sync Service Full Access: Allows admin full access to Sync Service settings
- Sync Service Limited Access: This permission enables edit permissions for Schools/Programs, Students, Applications, and Cutoff numbers. Admins cannot access the “Enable Export” and “Enable Import” buttons on the connection cards.

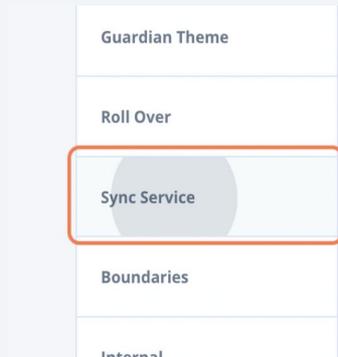
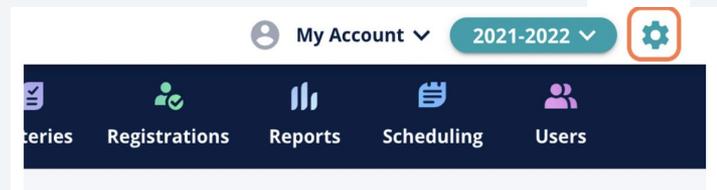
Settings

- i* Schools / Programs
- i* Lottery
- i* General
- i* Manage Forms
- i* Content & Letters
- i* Custom Data
- i* Roll Over
- i* Manage Theme
- i* Sync Service Full Access
- i* Sync Service Limited Access

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

The screenshot shows the SchoolMint Sync dashboard for Grove School District - 2021-2022. The dashboard header includes the SchoolMint Sync logo, the district name, and navigation links for Sync Logs, Back to SchoolMint Enroll, and Help. The main content area is titled 'Grove School District Sync Connections' and includes a sub-header 'Create or manage sync connections to sync data between SchoolMint Enroll and other systems.' and an 'Add Sync Connection' button. A dropdown menu is open under 'Sync Logs', listing various import and export logs. Callouts with arrows point to these elements, explaining their functions.

Brings you to Zendesk/ support

Check the status of import and export logs

Takes you back to Enroll

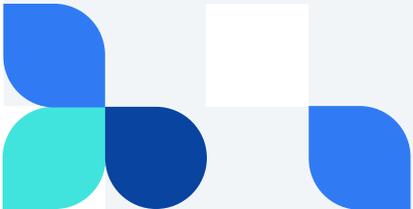
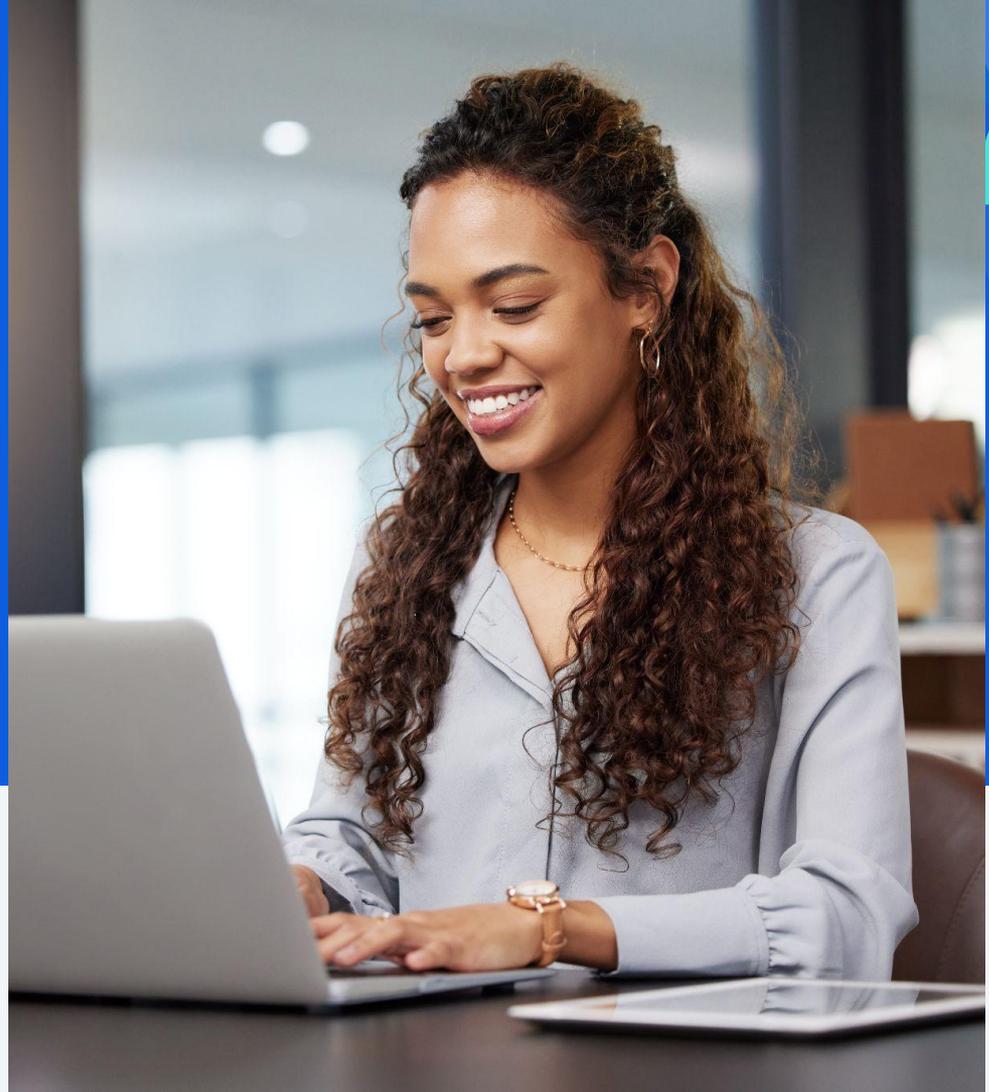
Click to add a new sync connection

Takes you back to sync service dashboard

Sync Logs ^

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

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
- Import Seat Tracker Mapping

[Click Here for Configuration Help](#)

Sync Connection

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

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



Sync Service:

Creating a Connection Demo

Sync Service Mappings



Create Import Mappings

The screenshot shows a configuration interface for creating import mappings. It features a dark teal header bar with the following elements from left to right: 'From Ad hoc CSV Field', 'Mapping Type', 'To SchoolMint Enroll Field', '< Mapped Value >', and an 'Overwrite' checkbox with an information icon. Below the header, there are four input fields: a dropdown menu (empty), a dropdown menu with 'Direct' selected, a text field with 'students.id', and a 'Mapped Value' field with 'N/A' and a checkbox. The 'Overwrite' checkbox is also present at the bottom right of the interface.

From Column Name: This is the name of the field in your organization’s SIS or CSV file

Mapping Type: Choose how this information is coming out of the system. Options are: direct, transformation, match codes, or do not map.

To SchoolMint Enroll Field: Choose the SchoolMint field name that matches your SIS or CSV mapping. How to find values on Enroll are in the following slide.

Mapped Value: This is where you can view how the information is formatted

Overwrite: The setting “Overwrite” determines how the system will handle NULL values in the import. If the setting is OFF for a given field, NULL values will not replace existing data. If the setting is ON for a given field, NULL values will overwrite existing data

How to find values in Enroll:

There are multiple places in which you can find the field names and values on Enroll:

1. Under **Settings > Forms > Form Field Download**
2. Under **Settings > Forms > Registration & Re-registration > Manage Steps > Manage Fields > Edit**

The screenshot displays the 'Edit' form for a field in the Enroll system. It is divided into several sections:

- Field Parameters:** Includes 'Field Type*' (Radio Button), 'Field Label*' (Are there any court orders you wish to notify the school about re...), and checkboxes for 'Required' (checked) and 'Required Admin'.
- Data Settings:** Includes 'Save To*' (Student Annual) and 'Field Name*' (court_order), which is highlighted with a red box.
- Field Options:** Includes 'Data Source*' (Enter Manually Below), 'Include "None" option', 'Include "Other" option', and 'Other Placement' (Bottom).
- Options Table:** A table with columns for Order, Option Value, Label (only if different than value), Default Value, and Actions. The 'Option Value' column contains 'Yes' and 'No', which are highlighted with a red box.

Order	Option Value	Label (only if different than value)	Default Value	Actions
=	Option Value * Yes	Label Yes	<input type="radio"/>	+ -
=	Option Value * No	Label No	<input type="radio"/>	+ -

(If field is using a Custom Data Source, navigate to Settings > Custom Data > Custom Data Sources > Edit)

How to find values in Enroll:

3. **API ONLY:** Under Settings > Sync Service > Sync Service Login >> Configure Mapping on your API connection >> Field Codes Dropdown

The screenshot displays the 'PowerSchool API' configuration page, specifically the 'Export Student Mapping' section. The page has two tabs: 'CONFIGURE' and 'FIELD MAPPING'. A dropdown menu titled 'Field Codes' is highlighted with an orange box, showing three options: 'Download SchoolMint Field Codes', 'Download PowerSchool Field Codes', and a 'Save' button. Below the dropdown, there is a 'Registration Examples' section with five rows of input fields. Each row contains a 'Registration Example' field and a 'Student Example' field.

Registration Example	Student Example
10010	2608648
10020	2542143
2376	2531504
30238	2443586
Registration Example - 5	Student Example - 5

Mapping Types

Direct

The values in Enroll match exactly to the values in your SIS. There are no formatting changes that need to happen in this mapping.

Match Codes

Used when information in Enroll needs a 1:1 change to match the formatting of your SIS or CSV. Once 'Match Codes' has been selected, click 'Configure'

Transformation

Think of this like using an Excel Formula to create the value/format you need. Once 'Transformation' has been selected, click 'Configure' to see the options available.

Match Codes

This is typically used for a 1:1 change to a value. For example:

Female → **F**

Configure Match Codes

Match Codes ▼ Configure

Mapped Value: **Students.Gender**

Select Code Match Set *
Code Matches - Gen... ▼

Map SchoolMint Enrollment Value	To PowerSchool Value
Enter exact text to match * Female	e.g. "CODE01" F 🗑️
Enter exact text to match * Male	e.g. "CODE01" M 🗑️
Enter exact text to match * Nonbinary	e.g. "CODE01" N 🗑️
Enter exact text to match * PreferNotToSay	e.g. "CODE01" N 🗑️
+	

Do you want to use a default value for empty SM fields?

Default Value

Note: leave blank if you wish to send a blank value

Cancel Save Match Set

Choose an existing Set or Create a New One

Create a default value for any null values that were collected

Input each value that we are collecting for that field on SM, and the matching value for the Org
Ex: Horse -> Cheval

Transformations

But I don't have a 1:1 change! My organization wants to do something like this:



More advanced changes, such as pulling data from multiple fields into one, splitting data from one field into two, etc, requires a TRANSFORMATION

Configure Transformations

Transformation ▼ Configure

Transform & Send Data ✕

To SFTP: **birthdate**

Date ✕ ? e.g.

Source Data ▼

Source Date Format ▼
YYYY-MM-DD

Destination Date Format ▼
YYYY-MM-DD

Cancel Save

Choose the transformation you need

Input the required data to complete

Common Transformations

Phone: Changes the format of a phone number

Example: We are collecting a phone number as (999) 999-9999 on SchoolMint, but the format in the SIS needs to be **9999999999**

Transform & Send Data ✕

To PowerSchool: 1 - **Contacts.phoneMobile**

Phone ? e.g.

Source Phone
student_annual.guardian1_phone

Phone Format
9999999999

Cancel **Save**

Common Transformations

Date: Changes the format of a date from a source format to a destination format

Example: We are collecting DOB as YYYY-MM-DD on SchoolMint, but the format in the SIS needs to be **MM/DD/YYYY**

Transform & Send Data ✕

To PowerSchool: **Students.DOB**

Date ? e.g.

Source Data
students.DOB

Source Date Format
YYYY-MM-DD

Destination Date Format
MM/DD/YYYY

Cancel Save

Common Transformations

Join: Links a series of strings with a delimiter

Example: We are collecting Guardian 1 First Name and Guardian 1 last name as separate fields on SchoolMint, but your SIS needs it as one Guardian Name field formatted as

Last Name, First name

Join ⓘ e.g. Reed, Jane

Delimiter: , ✕

student_annual.guardian1_lname ▼

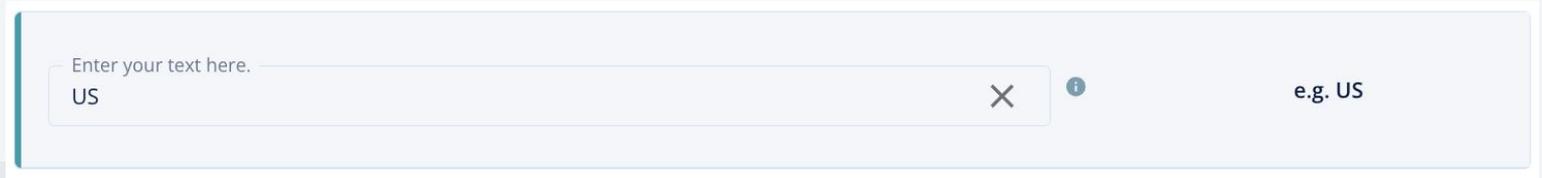
student_annual.guardian1_fname ▼ 🗑️

+ Input

Common Transformations

Value Input: Enter a specific value

Example: Your SIS requires all students to have their country field indicate they are in the US



A screenshot of a text input field. The placeholder text is "Enter your text here." and the current value is "US". There is a close button (X) and a help icon (i) to the right of the input field. To the right of the input field, the text "e.g. US" is displayed.

This can also be used in conjunction with other transformations, as we will see in the next slide...

Common Transformations

Concat: Add strings together

Example: We are collecting all address data as separate fields on SchoolMint, but your SIS needs it as one field formatted as **Address City, State Zip**

Concat ? e.g. 606 Evangeline Drive Lafayette, LA 70501

student_annual.address ▼ ✕ 🗑️

Enter your text here. ✕

student_annual.city ▼ 🗑️

Enter your text here. ✕ 🗑️

student_annual.state ▼ 🗑️

Enter your text here. ✕ 🗑️

student_annual.zip ▼ 🗑️

Common Transformations

Split: Divide text around one or more characters, and put a specified fragment into a field

Example: Address (including number and street name) is collected in one field, but your SIS collects the street number, and street name in two separate fields

The screenshot shows a configuration window for a 'Split' transformation. At the top, a dropdown menu is set to 'Split' with an information icon and the example text 'e.g. 606'. Below this are three input fields: 'Source Data' containing 'student_annual.address', 'Separator' which is currently empty, and 'Index' containing '1'. Each of the bottom three fields has a close button (X) on the right side.

Common Transformations

Split: Divide text around one or more characters, and put a specified fragment into a field

Example: Address (including number and street name) is collected in one field, but your SIS collects the street number, and street name in two separate fields



Common Transformations

If Then Else: Evaluate if a condition is true or false, and set the mapping for each

Example: Using a checkbox field, the school is collecting if a guardian has custody of the student along with other information. The school wants to send a “true” value if a guardian selected they have custody of a child, and “false” value if the guardian did not select that option

Guardian 1 Information *

- Is Custodian
- Lives with Student
- Can Pickup Student
- Receives Mail

The screenshot shows a configuration window for an 'If Then Else' transformation. At the top, a dropdown menu is set to 'If Then Else' with a blue information icon to its right. Below this, a 'Condition' dropdown is set to 'Contains', also with a blue information icon. Underneath, a 'Conditions' section contains three rows of configuration options, each with a blue 'X' icon for removal:

- Row 1: 'Equals' is selected, followed by a text input field containing 'al.guardian1_info' and a dropdown menu.
- Row 2: 'Is Truly' is selected.
- Row 3: 'Is Falsy' is selected.

Below the 'Conditions' section, there are three rows of logical operators, each with a blue 'X' icon for removal:

- Row 1: 'OR' is selected.
- Row 2: 'AND' is selected.
- Row 3: 'Contains' is selected.

On the left side of the configuration area, there are three small tabs labeled 'Ti', 'tr', and 'Ei', with 'Ei' currently selected. The 'Ei' tab is associated with the 'Contains' operator in the third row.

Other Common Transformations

Lower: Makes strings lowercase

Upper: Makes strings uppercase

Pick: Selects the first of a set of values that contains a non-empty value

Today: Obtain the current date

Enroll School Year: Populates the field with the current school year in Enroll.

Length: Determines how many characters are in the input received

[Click Here: Sync Service Transformation Overview](#)

Complicated Transformations/Match Codes



If your organization requires complicated transformations or match codes, please reach out to your Customer Experience Manager or Technical Support Representative

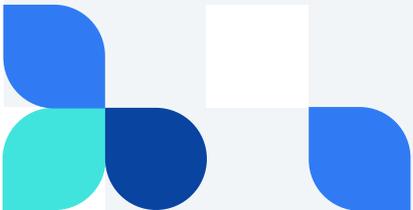


Sync Service: Mapping Demo

Syncing Data



Troubleshooting Sync Errors



While processing student import logs, you may notice that some have a Sync Status of **Failed Sync**

Sync Status	Last Sync
Failed	2023-09-14 14:43:25

 **SIS Synced Error**

You can troubleshoot these issues by navigating to **Settings > Sync Service > Sync Service Login > Accessing your Student Import Logs**

Sync Logs ^

- 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



Sync Service:

Scheduling Imports (SFTP/API)

Zendesk

Help Articles

Webinar Recordings and Slide Decks

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Resources

Q&A

Survey





Thank You



THANK YOU!





SchoolMint Enroll