



# SchoolMint Enroll

## SIS Mapping and Data Preparation



# Meet the Hosts



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



**Courtney Peltier**  
Implementation Specialist  
Q&A



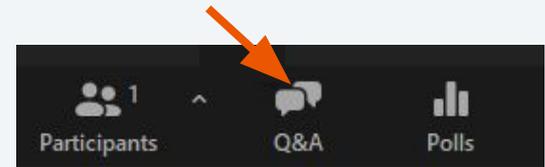
# Logistics



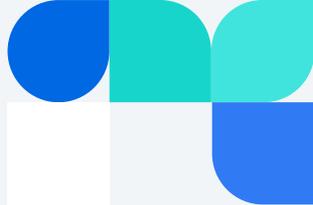
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

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



Two Surveys at the end

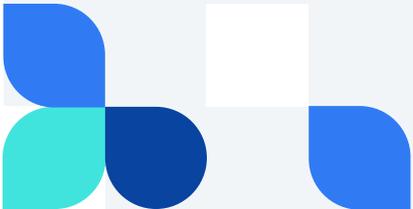


## Today's Goals

- Data Mapping
- Match Codes
- Transformations Overview



# Accessing Sync Service



# Sync Export Access

## Users > User Groups > Edit

- Sync Service Full Access: Allows admin full access to Sync Service settings.

**Note: In order to EXPORT students, you must have Registrations with Enroll**

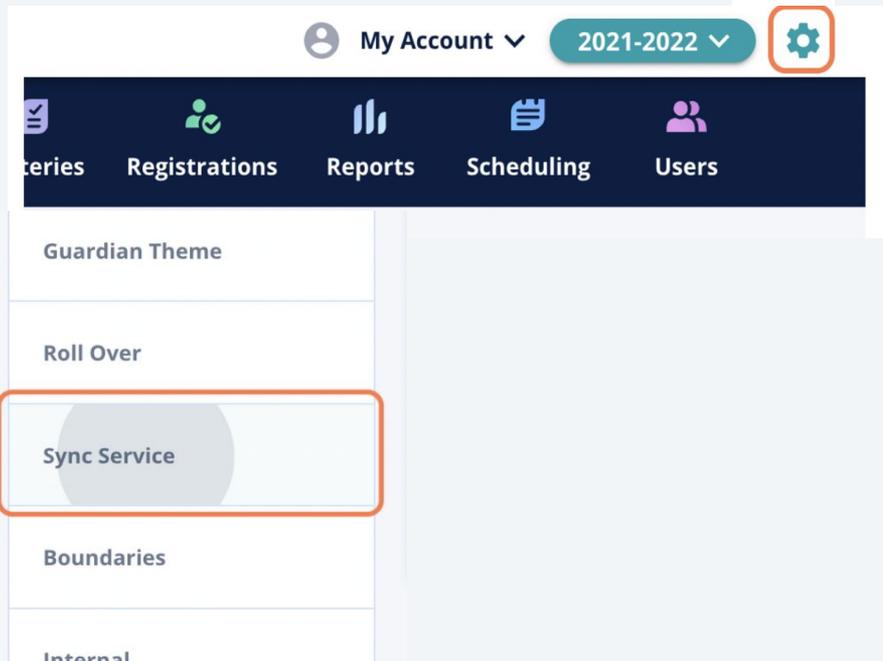
### Settings

- 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](#)

# Types of Connections



# Export Connection Types

## Ad Hoc

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

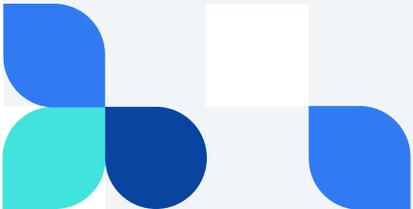
## SFTP

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.

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

# Configuring Your Export



# Configure Export

CONFIGURE

FIELD MAPPING

Save

## Registration Examples

Registration Example - 1

65486

Student Example - 1

7672690

Registration Example - 2

65480

Student Example - 2

7672684

Registration Example - 3

Student Example - 3

Registration Example - 4

Student Example - 4

Registration Example - 5

Student Example - 5

Student's  
Registration Form ID

Student's  
SchoolMint or SIS ID

**TIP:** Make sure you have at least one  
Approved registration for better testing

# Where to Find IDs

Registrations > Edit

https://enrollwebinardemo.schoolmint.com/manage/registrations/edit/7672690/12756/186765486

READ Academies | Edit: 2024-2025

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Users

Registration 2024-2025: Edit

Withdraw Sync to SIS View Flags View Go to Student Profile

Erye, Jane

Student ID: 7672690

SIS Student ID: 10009

Guardian(s) Add/Manage: 2553127: Jane Reed

Register in: Jane Austen Middle

Re-Registration New Registration

Save Registration

Student's Registration Form ID

Student's SchoolMint or SIS ID

# Mapping Simplified



# Remember These?

In essence, this is what we are doing when mapping to your SIS.

Name:

Date:

## Match The Column

### Column A

Cow

Lion

Horse

Bird

Spider

Dog

Fish

### Column B

Mare

Milk

Den

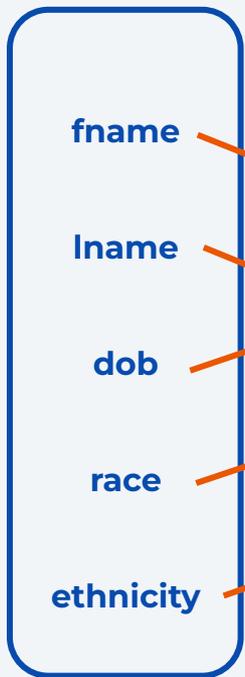
Water animal

Nest

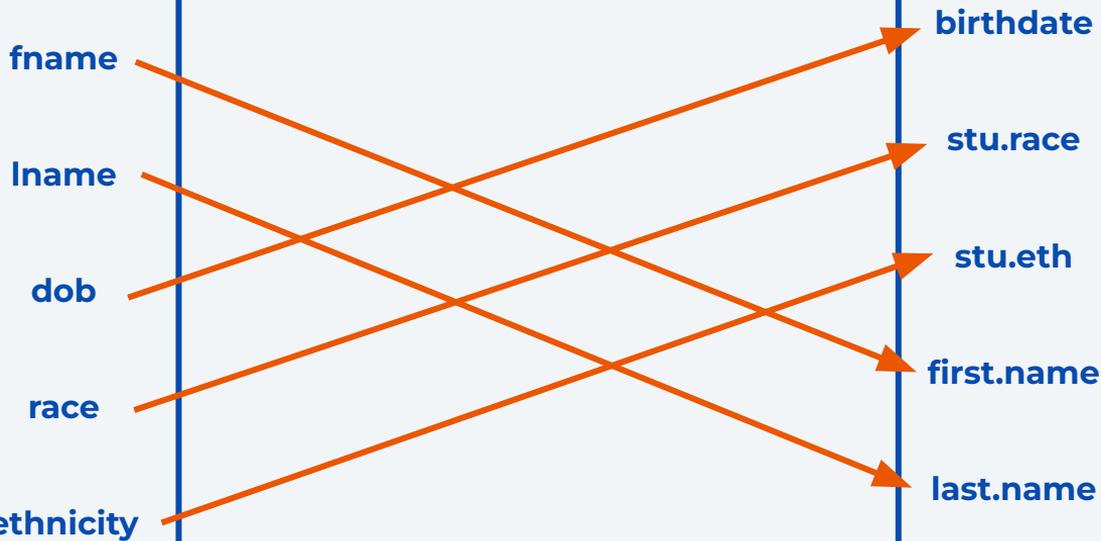
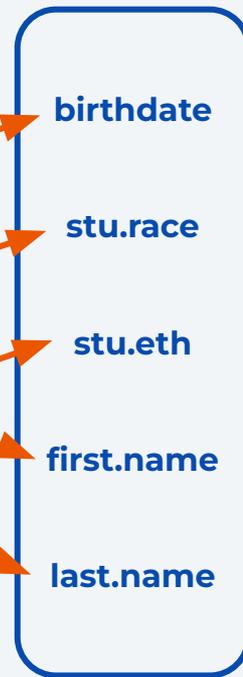
Web

Pet animal

## SchoolMint



## Your SIS



# Create Mappings

From SchoolMint Enroll Field	Mapping Type	To SFTP Field	< Mapped Value >	<input type="checkbox"/> Overwrite <span>?</span>
students.student_district_id ▾	Direct ▾	Field/Column Name district.id	10009	<input type="checkbox"/> 

**From Column:** This is the name of the field we are using for SchoolMint

**Mapping Type:** Choose how this information is coming out of the system. Options are: direct, transformation, match codes, or do not map (more on the next slide).

**To Column:** The SIS/CSV field that matches your SchoolMint field

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

**Overwrite (checkbox):** The setting “Overwrite” determines how the system will handle NULL values in an import. If the setting is DISABLED for a given field, NULL values will not replace existing data. If the setting is ENABLED for a given field, NULL values will overwrite existing data

**Delete (trashcan icon):** Remove the mapped field from your configuration

# Mapping Types

## Direct

No change to the format or value is needed. How we are collecting the data in Enroll is exactly how we are collecting the data in your SIS

## Match Codes

Used when information in Enroll needs a simple change to match the value 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

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

## Mapped Value:

New Code Match Name \*  
Gender

Map SchoolMint Enroll Value

To SFTP 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 \*  
Decline

e.g "CODE01"  
D

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

Default Value  
D

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

# 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

# Types of Transformations

**Transliterate:** This transformation will only allow for upper or lower case alphabetic characters, apostrophes, dashes, and spaces

Example: A student has a special character in their name (that is not a dash, apostrophe, or space) - IE "East,West"

### Transform & Send Data

To SFTP: Last Name

Transliterate ⓘ e.g. Eastwest

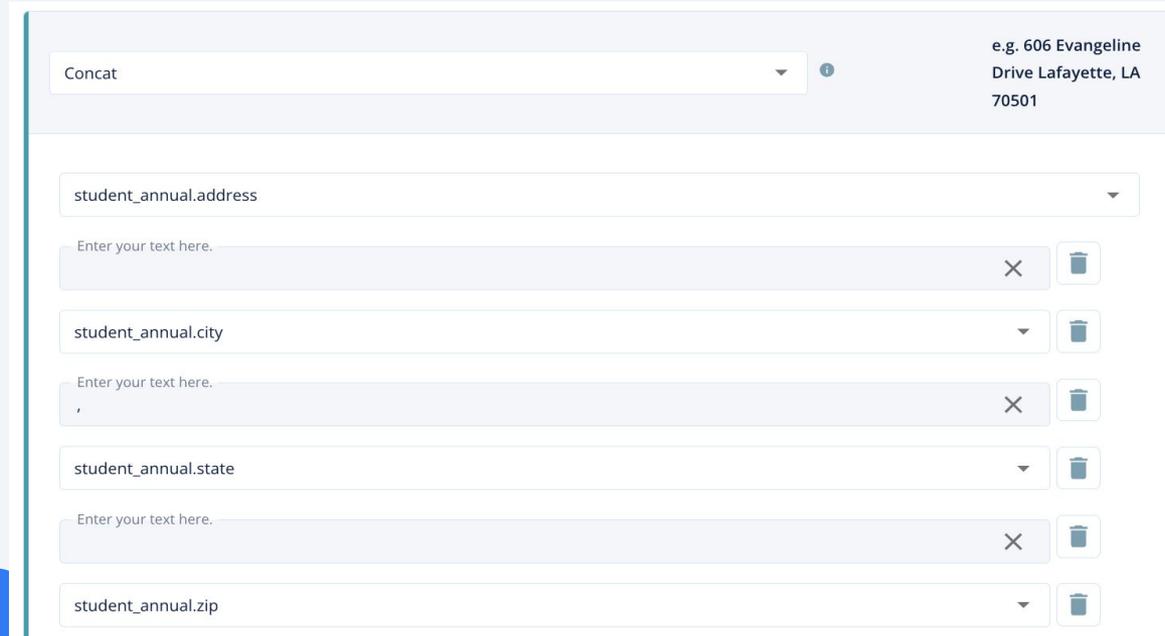
Field to apply the transformation  
students.lname ✕

Cancel Save

# Types of 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

# Types of 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 field contains the text "US". Above the text is the placeholder "Enter your text here.". To the right of the text is a small "X" icon for clearing the field and a small "i" icon for help. To the right of the field is the text "e.g. US".

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

# Types of 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

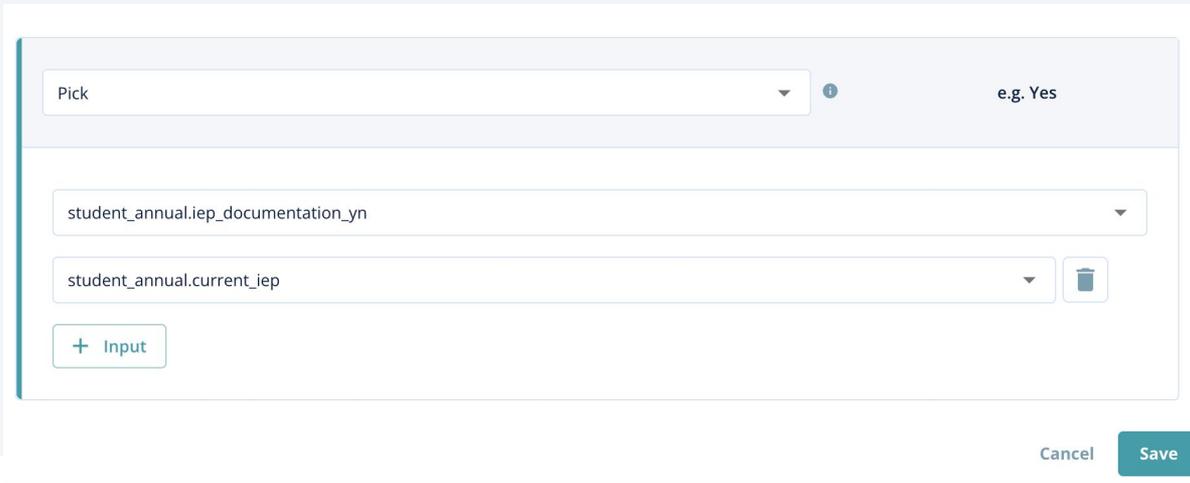
**Last Name, First name**

The screenshot shows a configuration window for a 'Join' transformation. At the top, a dropdown menu is set to 'Join' with a help icon (i) and an example output 'e.g. Reed, Jane'. Below this, a 'Delimiter' field contains a comma character with a clear button (X). Two input fields are listed: 'student\_annual.guardian1\_lname' and 'student\_annual.guardian1\_fname', each with a dropdown arrow and a trash icon. At the bottom left, there is a '+ Input' button.

# Types of Transformations

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

Example: On our form, we have a parent supplied question, and an admin supplied question. If the parent does not answer, an admin will enter in that data.

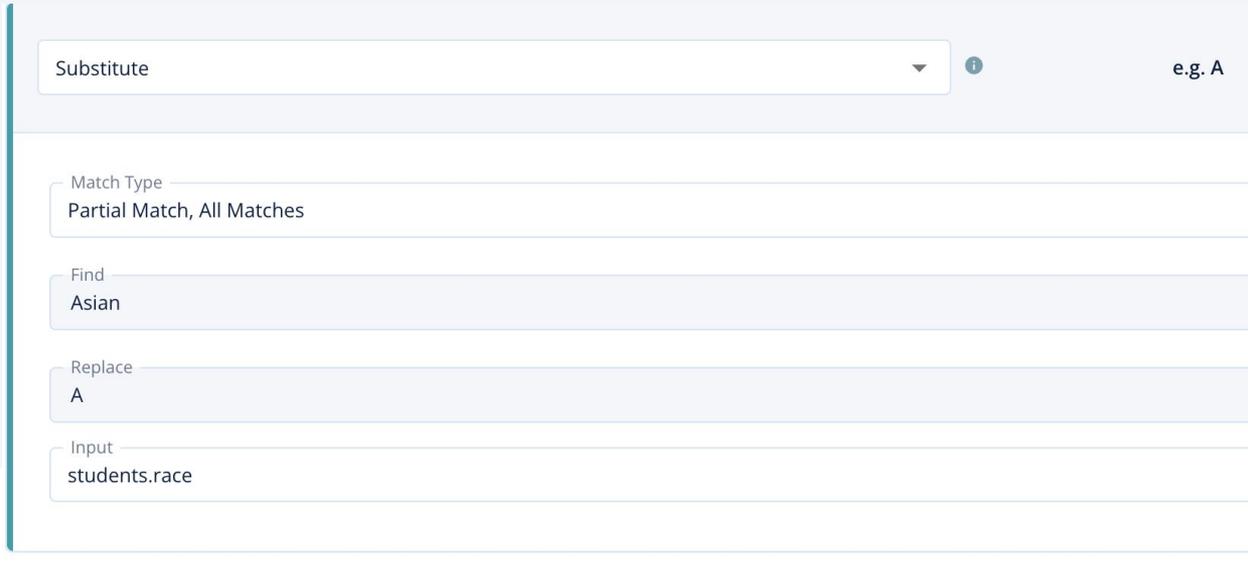


The screenshot shows a configuration window for a 'Pick' transformation. At the top, there is a dropdown menu with 'Pick' selected, a small information icon, and the text 'e.g. Yes'. Below this, there are two input fields: the first contains 'student\_annual.iep\_documentation\_yn' and the second contains 'student\_annual.current\_iep'. To the right of the second field is a trash icon. At the bottom left of the configuration area is a '+ Input' button. At the bottom right of the window are 'Cancel' and 'Save' buttons.

# Types of Transformations

**Substitute:** Finds and replaces text in your data

Example: You can use this like any “find and replace” feature in Excel, sheets, numbers, online documents, etc. For example, you need to replace a word in a value with a letter.



The screenshot shows a user interface for a data transformation tool. At the top, there is a dropdown menu labeled 'Substitute' with a downward arrow and a small information icon. To the right of the dropdown, the text 'e.g. A' is displayed. Below the dropdown, there are four input fields, each with a label and a value:

- Match Type:** Partial Match, All Matches
- Find:** Asian
- Replace:** A
- Input:** students.race

# Types of 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 empty, and 'Index' containing '1'. Each of the last three fields has a close button (X) on the right side.

Split	e.g. 606
Source Data	student_annual.address
Separator	
Index	1

# Types of 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



# Types of 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

# Types of 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**

# Types of 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 the configuration for an 'If Then Else' transformation. At the top, a dropdown menu is set to 'If Then Else' with an information icon. To the right, the text 'e.g.' is displayed. Below this, a 'Condition' dropdown is set to 'Contains' with an information icon. Underneath, a list of 'Conditions' is shown with a table structure:

Condition	Value	Action
Equals		✕
Is Truly		
Is Falsy	al.guardian1_info	▼
Is Present		

Below the conditions table, there are three rows for the transformation logic:

Tl	OR	✕
tr	AND	
EI	Contains	✕

# Other Types of Transformations

Lower: Makes strings lowercase

Upper: Makes strings uppercase

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 CXM or our Support Team on Zendesk! Also be sure to determine if there are any ways you can simplify your form to make mapping easier in the future

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**THANK YOU!**





# SchoolMint Enroll