



SchoolMint Enroll

SIS Management on SchoolMint Enroll



Meet the Hosts



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Q&A



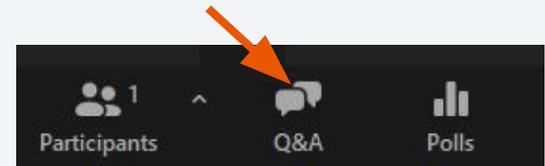
Logistics



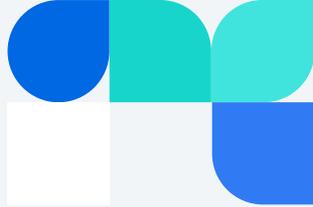
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

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



Two Surveys at the end



Today's Goals

- Syncing Students through Ad Hoc, SFTP, and API
- Troubleshooting Sync Service Errors



User Group Access

Users > User Groups > Edit

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

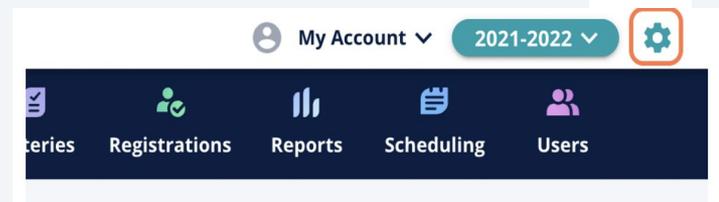
This webinar will cover enabling Imports & Exports on the connection cards. If you have limited access to this area, there may be sections today that do not apply to you.

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

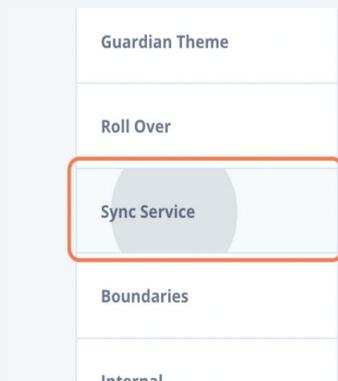
Accessing Sync Service Settings > Sync Service > Sync Service Login

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



My Account ▾ 2021-2022 ▾ ⚙

Series Registrations Reports Scheduling Users



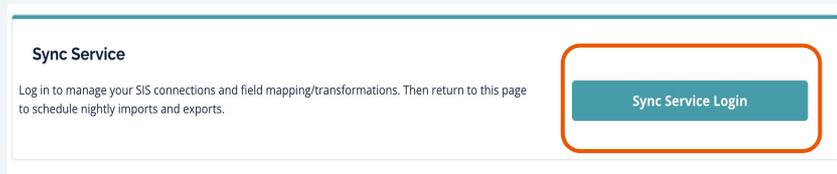
Guardian Theme

Roll Over

Sync Service

Boundaries

Internal



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 log types. Callout boxes 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

Takes you back to sync service dashboard

Click to add a new sync connection

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

Types of Connections



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

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

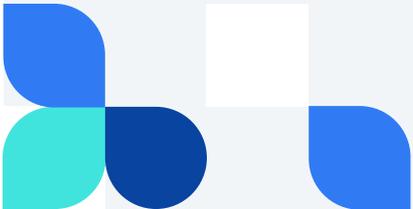
Bulk Action

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

Search Schools All Groups All School Levels

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

Syncing Students



Bulk Export: API



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

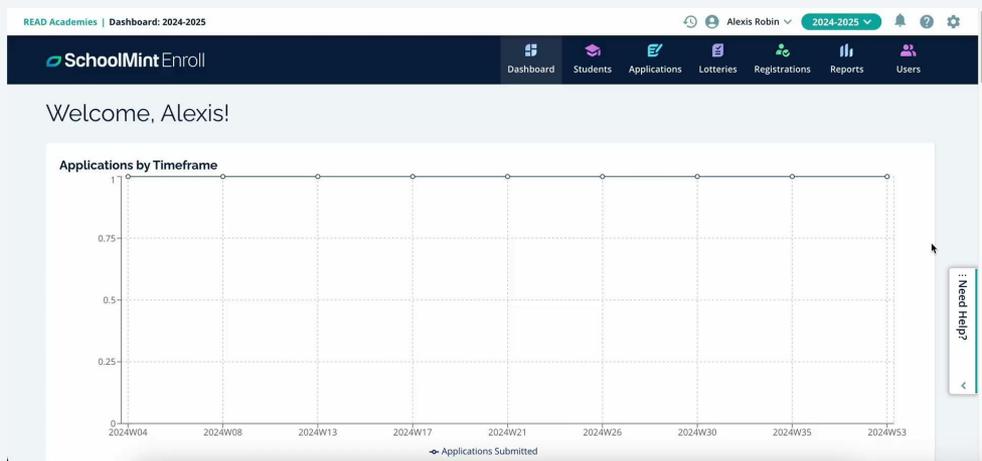
Individual Export: API



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. After reviewing or Saving any changes, select the green 'Sync to SIS' button at the top of the screen

Bulk Export: SFTP

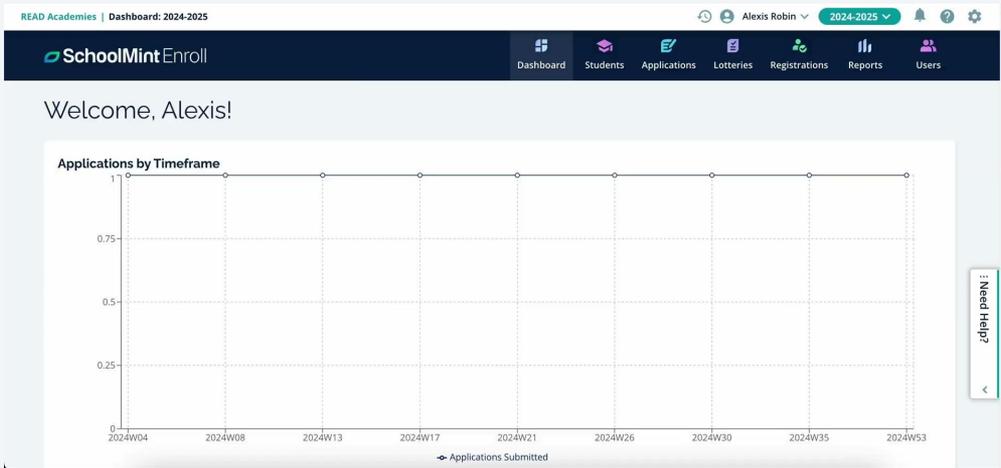


NOTE: This is only available for SFTP imports and exports

Navigate to your Settings module

1. Go to the Sync Service Tab
2. Toggle on the **Schedule** button to enable the scheduling of Imports and/or Exports
3. Set the time of day you want the files to be imported/exported
4. Save
5. Sync Students to SIS
6. Either manually grab students off the SFTP, or determine if your SIS has an automatic transfer feature

Bulk Export: Ad Hoc



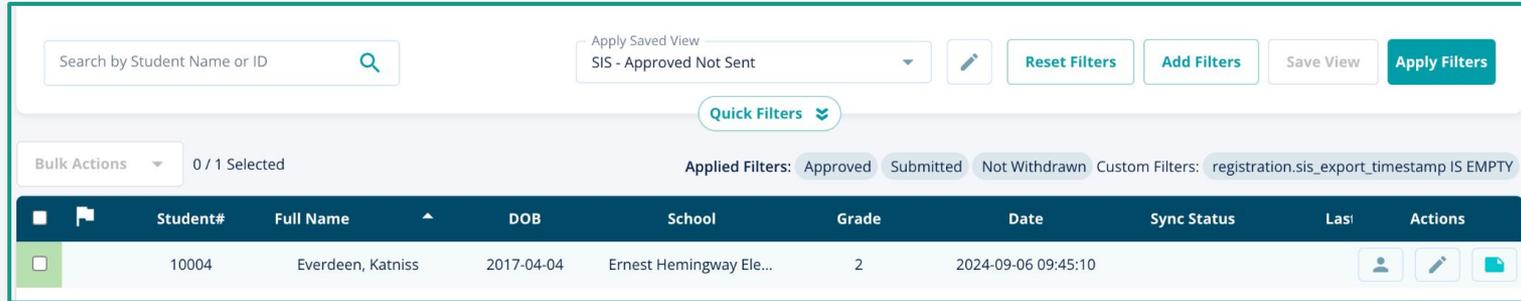
NOTE: If you open your CSV file in a platform like Excel before importing to your SIS, ensure your formats are still correct

1. Sync student(s) to SIS
2. Navigate to your Settings module
3. Go to the Sync Service Tab
4. Click Sync Service Login
5. On your Sync Dashboard, click the 3 dots on the corner of your Ad Hoc connection
6. Click Generate Student CSV
7. Check your Student Export Logs to confirm that all students are in Success Status
8. Go back to Sync Service Dashboard and click Download Student CSV

Tip: Create this Dynamic View

There are many times schools will want to pull their students who have been approved and have **NOT** been synced to their SIS.

1. Use your quick filters to filter for Approved status
2. Create a custom filter for **registration.sis_export_timestamp IS EMPTY**
3. Click **Save View** to create your new dynamic view



The screenshot displays the SchoolMint interface with a search bar and filter controls. The search bar contains the text "Search by Student Name or ID". The filter dropdown is set to "SIS - Approved Not Sent". Below the search bar, there are buttons for "Reset Filters", "Add Filters", "Save View", and "Apply Filters". A "Quick Filters" button is also visible. The table below shows a single student record with the following details:

Student#	Full Name	DOB	School	Grade	Date	Sync Status	Last	Actions
10004	Everdeen, Katniss	2017-04-04	Ernest Hemingway Ele...	2	2024-09-06 09:45:10			

Troubleshooting Sync Errors

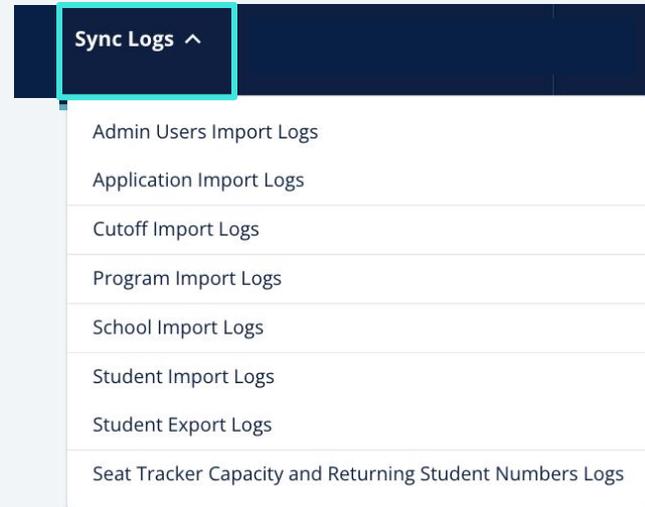


While processing student registrations, you may notice that some have a Sync Status of **Partial Sync** or **Failed Sync**

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

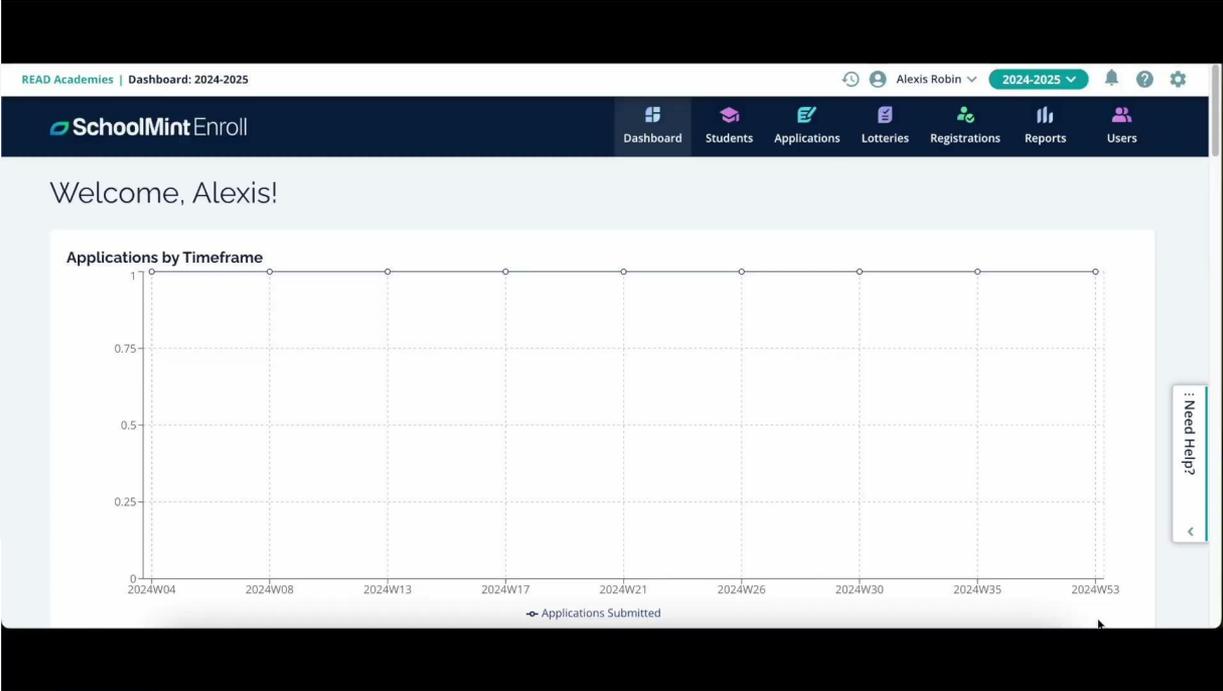


You can troubleshoot these issues by navigating to **Settings > Sync Service > Sync Service Login > Accessing your Student Export Logs**



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



Example Errors

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

Example SIS	Student 1	2023-07-18 15:03:58	FAILED
Example SIS	Student 2	2023-07-18 15:03:58	FAILED
Example SIS	Student 3	2023-07-19 18:13:00	FAILED
Example SIS	Student 4	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"}  
}
```

```
{  
  "error": {"contact/doctor_phone": ["Does not  
    match the regex pattern (\\d{10}|\\d{3}\\d-  
    \\d{3}\\d-\\d{4}|^$)"]  
}
```

In this example, we can see that the phone field format needs to be updated for the Doctor Phone. The “d” here stands for digits, and the “expected format | current format” is being showcased.

Zendesk

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Webinar Calendar and Resources

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Resources

Monthly Webinar

Fundamentals of Reporting

- Learn the basics of the Reports Module
- Available every month, so join one that works best for you

[Click Here to Register](#)

THANK YOU!

