STATE OF SOUTH CAROLINA
DEPARTMENT OF EDUCATION

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STATE SUPERINTENDENT OF EDUCATION
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Installation Guide
SUNS PowerSchool Integration Plugin

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INSTALLATION GUIDE - SUNS POWERSCHOOL INTEGRATION PLUGIN

Introduction

Purpose of this document

This guide describes how to install the SUNS plugin provided by the South Carolina Department of Education (SCDE). This installation should occur at the district level. After installing the plugin through PowerSchool, users can set up the appropriate data extract and import functions supported by the plugin.

Points of Contact

For question on installation and issues please use the following contact information:

Office of Research and Data Analysis
Data Collection Team
PowerSchool@ed.sc.gov

Installation Requirements

Before beginning the install, make sure the following items are complete.

Contacts

The system sends out emails at various stages of SUNS processing.

- Please provide SCDE with a single email address for the person or people who handle SUNS IDs for the district to use. The email should have the following formatting - SUNS_d####@[the district mailbox account] – where #### equals the district code.

Network

- The plugin will be connecting to filedrop.ed.sc.gov so the networking staff needs to whitelist the filedrop.ed.sc.gov URL.
- The plugin will be connecting to Port 22 so the networking staff needs to make sure SFTP Port 22 is open.
- To make sure the emails gets delivered, whitelist the email address SUNS@ed.sc.gov.

PowerSchool

- The install needs to be done by a PowerSchool Administrator using the District profile in PowerSchool.
- The PowerSchool Administrator needs permission/access to the Data Export Manager.
- Retrieve the district Username and Password from the ADT – Tech Coordinator folder. The Username will be d#### where #### is the 4 digit district code. This will be used in the Remote Connection Setup.
## Version Control

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<td>Update Install SUNS Integration Plugin Step 1 and added new Step 2</td>
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<td>Update Setup SUNS Extract to remove Step 2 as unnecessary</td>
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<td>Update Create an Import Task to reflect the correct Name in Step 7.</td>
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Setup Connection to SCDE SFTP Server

This section describes how to PowerSchool’s Remote Connection Manager and connect to the SCDE SFTP server.

1. Login to PowerSchool as an admin.
2. Under Settings in the left menu bar click System to open the System Administrator page.
3. On the System Administrator page, scroll to Server and click System Settings.
4. On the System Settings page, scroll to Plugin Management Configuration and click to open.
5. On the Plugin Management Dashboard scroll to the bottom of the page and select Remote Connection Manager.
6. The Remote Connection Manager Setup page will open, click the Remote Connection Manager link at the bottom of the page.

7. On the Manage Remote Connections screen, there may be existing remote connections set up, do not change any of them. A new setting will be created for the SUNS SFTP integration in Step 8.

8. Click the Create Connection button above the list of remote connections.
9. Enter the following information in the Create Connection pop up window:
   a. Name: SCDE SUNS SFTP
   b. Description: Connection to SCDE SFTP server for SUNS data extract/import.
   c. Protocol: SFTP
   d. Host: filedrop.ed.sc.gov
   e. Port: 22
   f. Authentication Type: Password
   g. Username: [obtained separately from SCDE. See the Installation Instructions section]
   h. Password: [obtained separately from SCDE. See the Installation Instructions section]
   i. Confirm Password: Re-enter the password.
   j. Fingerprint: N/A
   k. Remote Path: Leave blank
   l. Allow download: Check box
   m. Allow upload: Check box
10. Before clicking the Submit button, test the connection by clicking the Test Connection button found under the Username and Password fields.
a. If the error is Connection Failed due to a host key issue, click the Yes, Accept Host Key button to save and trust this server within PowerSchool.

b. If the test fails and times out, the correct SFTP port may not be open.

c. If the error is psx.ftl.admin_pluginconsole.test_remote_connection.connect.protocol, then there is a network issue. The most likely issue is that the server was unable to reach filedrop.ed.sc.gov and the URL needs to be whitelisted by the district.

11. Click the Submit button to save the Remote Connection settings. The new SCDE SUNS SFTP remote connection will now show in the Manage Remote Connections list.
Install SUNS Integration Plugin

This section describes how to install the SCDE PowerSchool Plugin for SUNS Integration.

1. Access the district’s ADT District Tech Coordinator folder and download the plugin called SUNS-Integration-v1.2.txt to a folder as SUNS-Integration-v1.2.zip. The extension must be changed to .zip from .txt. Make a note of where the plugin was saved.

2. Login to PowerSchool as an admin.

3. Under Settings in the left menu bar click System to open the System Administrator page.


5. On the System Settings page, scroll to Plugin Management Configuration and click to open.

6. On the Plugin Management Dashboard, click the Install button to access the Plugin Install screen.

7. At Plugin Installation File, click Choose File and navigate to the folder where the plugin was saved. Click the Install button to install the plugin.

8. Enable the plugin once it is installed. Scroll down the list of plugins to find it and check the box to enable it

NOTE: The plugin is listed as SCDE SUNS Collection
9. On the *Are you sure you want to enable...* pop up, click the Enable button to complete the enabling process.

**Setup SUNS Extract**

This section describes the setup of the data extract for the SUNS Integration plugin.

1. Login to PowerSchool as an admin.
2. Under Functions in the left menu bar click Special Functions to open the Special Functions page.
3. On the Special Functions page, scroll to Importing & Exporting and click to open.
4. On the Importing & Exporting page, scroll to Data Export Manager under the Exporting section and click to open.
5. On the Data Export Manager screen, under Select Columns to Export, click the Category dropdown list and choose Additional Data Sets.

![Data Export Manager](image)

6. Click the Export From dropdown list and select the AA SUNS Extract No ID Student data set.
7. Check the eScholar check box and click next

8. Do not make any changes to the Select/Edit Records screen that appears next.

9. Click Next to get to the Export Summary and Output Options screen

10. Enter the following

   a. Export File Name: IDREQ-[4 digit district code]-%d-%t.txt. Enter the applicable district code where indicated and do not include the brackets.

   b. Line Delimiter: Select CR from the dropdown

   c. Field Delimiter: Select Other from the dropdown and enter an asterisk (*) in the Other field.
d. Character Set: Select Windows Ansi from the dropdown

e. Include Column Headers: Uncheck the checkbox to deselect

f. Surround “field values” in Quotes: Uncheck the checkbox to deselect

g. Click Save Template.

11. On the next screen, name the template SUNS Extract no ID Students, a description is optional.
12. Click Save as New when done.

13. After the template is saved, click the My Templates tab to see it in the list of templates.

14. There should be a calendar icon under Actions on the right side. If not, see Appendix A for instructions on how to resolve this issue.
Create a Scheduled Export Task

This section describes creating a scheduled task for data export.

1. Login to PowerSchool as an admin.
2. Under Functions in the left menu bar click Special Functions to open the Special Functions page.
3. On the Special Functions page, scroll to Importing & Exporting and click to open.
4. On the Importing & Exporting page, scroll to Data Export Manager under the Exporting section and click to open.
5. On the Data Export Manager screen, click the My Templates tab.
6. If there is more than one template available, scroll to the SUNS Extract no ID Students template and click the Calendar icon under Actions.
7. The Set Schedule pop up window will open.
   a. Schedule Active: Check the checkbox
   b. Days to execute:
   c. When to Execute:
   d. Send Output To: SCDE SUNS SFTP
   e. Path: [greyed out]
   f. Email Completion Report To: [doesn’t work]
   g. Click Save
Note: Select the appropriate days and time for the school. Some districts may setup a midnight export or some specific time. Choosing a slightly random time such as 12:10 AM, 10:35 AM is recommended. If all schools choose to export on the hour, half hour or quarter hour, there may be a slowdown in processing.

8. The scheduled task will appear on the Scheduled System Templates tab. Note the arrow under Actions, this is the Run Now button. Click this and the export will run immediately.

9. To schedule an export more than once a day, repeat Steps 6 through 8 and choose a different time under When to Execute.

Create an Import Task

This section describes how to setup PowerSchool to import ID results files from the SUNS system. These are called AutoComm jobs.

There are 2 files to import – IDRES (the newly created IDs), and IDRNM (near matches)

1. Login to PowerSchool as an admin.
2. Under Settings in the left menu bar click System to open the System Administrator page.
4. On the AutoComm Setup page, click New to create a new AutoComm task.
5. On the AutoComm Record screen, fill in the fields as follows:
   a. Name: IDRES1
   b. Table to Import: Students
   c. When to execute: (pick a time during daylight hours, perhaps the time this task is being created.)
   d. Days to Execute: MTWHFSU
   e. Turn Execution Off: Leave unchecked
   f. Get Input From: Select Managed Connection and then select SCDE SUNS SFTP
   g. Path: IDRES.results
h. Field Delimiter: Leave default
i. Record Delimiter: Leave default
j. Character Set: Leave default
k. Sort Order: Leave default
l. Synchronize Mode: Leave default. Note: Only select this checkbox when PowerSchool data is updated from another source, such as a mainframe.
m. Update existing records with imported data (when applicable): Check the checkbox to select.
n. Mark students and their schedules inactive when their exit date is <= today: Leave default
o. First record of file is "number_of_records=" **: Leave default
p. E-Mail completion report to: Leave default
q. PowerSchool fields to import into: Copy and paste the following exactly

```plaintext
U_SC_SUNS.RECID
U_SC_SUNS.SCHOOL_ID
U_SC_SUNS.DISTRICT_ID
U_SC_SUNS.LAST_NAME
U_SC_SUNS.FIRST_NAME
U_SC_SUNS.MIDDLE_NAME
U_SC_SUNS.SUFFIX
U_SC_SUNS.GENDER
U_SC_SUNS.DOB
U_SC_SUNS.GRADE
STUDENT_NUMBER
U_SC_SUNS.SSN
U_SC_SUNS.ETHNICITY
STATE_STUDENTNUMBER
U_SC_SUNS.DISTRICT_CODE
U_SC_SUNS.YEAR
U_SC_SUNS RESERVED1
U_SC_SUNS RESERVED2
U_SC_SUNS RESERVED3
U_SC_SUNS RESERVED4
U_SC_SUNS RESERVED5
U_SC_SUNS RESERVED6
U_SC_SUNS RESERVED7
U_SC_SUNS RESERVED8
U_SC_SUNS RESERVED9
U_SC_SUNS RESERVED10
U_SC_SUNS RESERVED11
U_SC_SUNS.RECORD_STATUS
U_SC_SUNS.RECORD_REFERENCE
```
Note: Make sure there are no blank lines in the field list when done copy and pasting.

r. When done, the screen should look like this:

![Installation Guide - SUNS PowerSchool Integration Plugin](image)

6. Click the Submit button to create the AutoComm.

7. Repeat Steps 5 and 6 to create an AutoComm task for the IDRNM.results file. Repeat everything in Step 5 with the exception of the following fields:

- 5a. Name: IDRNM1
- 5c. When to execute: Pick a time different from the time chosen in IDRES1
• 5g. Path: IDRNM.results

8. When done, the screen should look like this:
Appendix A - Allow User to Schedule System Templates

If the Calendar Icon does not show up under Actions on the My Templates tab of the Export Templates page, the user role does not have the privileges within the role administration to set up and manage scheduled system templates. The existing Data Export Manager Roles can be modified to allow this role to set up and run scheduled system templates.

1. Login to PowerSchool as an admin.
2. Under Settings in the left menu bar click System to open the System Administrator page.
3. On the System Administrator page, scroll to Security and click Roles Administration.
5. On the User Access Roles page, click Data Export Manager Export/Edit Access to edit the User Access Role.
7. Under Settings, check the box next to User can set up and run scheduled system templates to enable that feature for the User Role.

Note: It is not required that the Data Export Manager Export/Edit Access role be used if there is a need to lock down security in a more granular fashion. A different role can be used or a new role created if needed. However, it is required that the user performing the functions outlined in this document is assigned this role in order to schedule the tasks appropriately.