Automated Data Transfer (ADT) Agent Instructions

School Year

2010-11

v001; Last revised on: September 15, 2010

This document provides instructions for the Automated Data Transfer (ADT) agent.

For questions, please contact the Help Desk at: 222-8400 or **helpdesk@ride.ri.gov**.

https://www.eride.ri.gov/doc/10-11ADT_Instructions.pdf

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Prerequisites

Supported Operating Systems:

- Windows XP
- Windows Vista
- Windows 2000
- Windows 2003

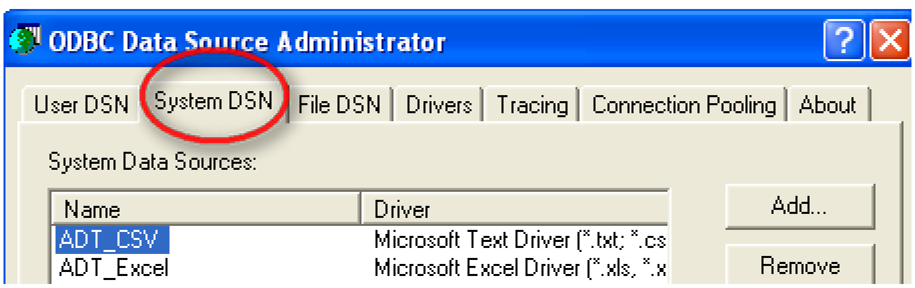
The RIDE Data agent is a Microsoft ClickOnce application. The initial installation requires Internet Explorer 6 or greater.

The machine used to run the RIDE Data Agent must be able to access the Student Information System server across the network. This machine must also be logged in during the scheduled time.

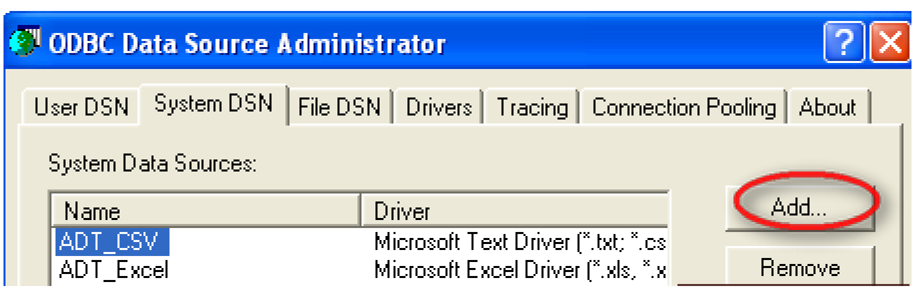
Creating a System Data Source

1. Click on Start / Control Panel / Administrative Tools / Data Sources (ODBC)

2. Click on System DSN:



3. Click on Add…



4. If you are using:

   a. Excel files, click on 'Microsoft Excel Driver (*.xls):

   b. Text or CSV files, click on 'Microsoft Text Driver (*.txt, *.csv):

      i. Make sure you click on: 

      to choose where these files are located.

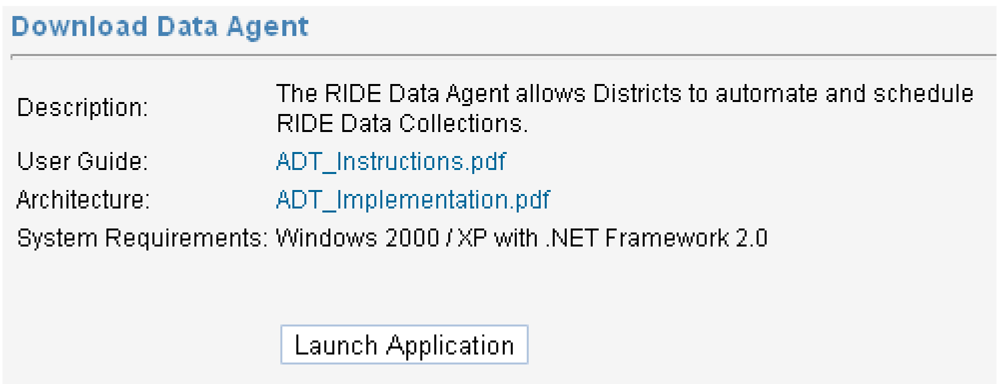
   c. SQL Server, click on 'SQL Native Client':

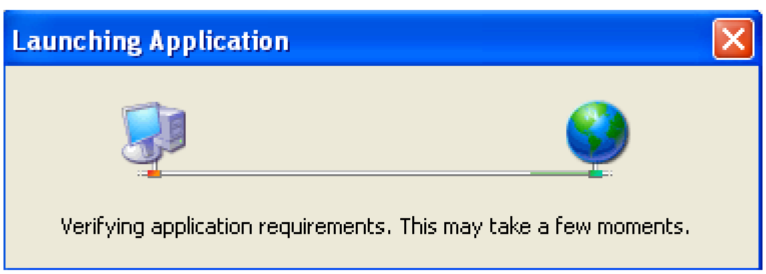
Installation and Configuration

Click the **Automated Data Transfer** icon on the main eRIDE page:

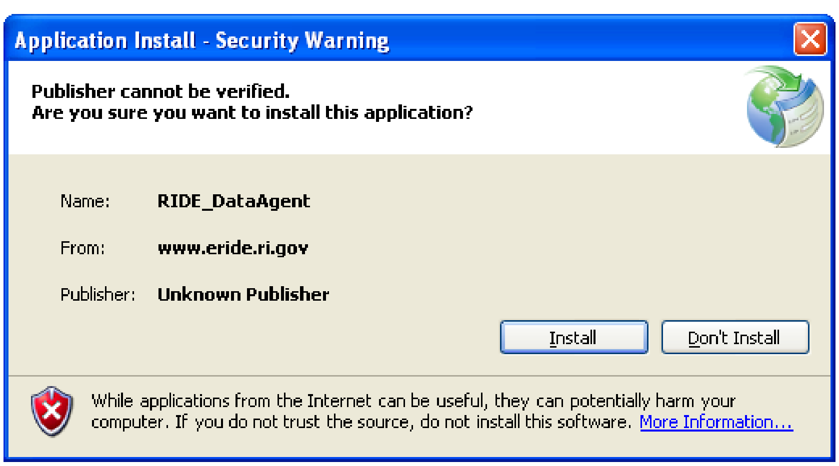
Click the **Launch Application** button:



You will see the following window appear:



You will be presented the Application Install – Security Warning window that will prompt you to install the application; click the **Install** button. The application will be installed on your machine and will launch once complete.



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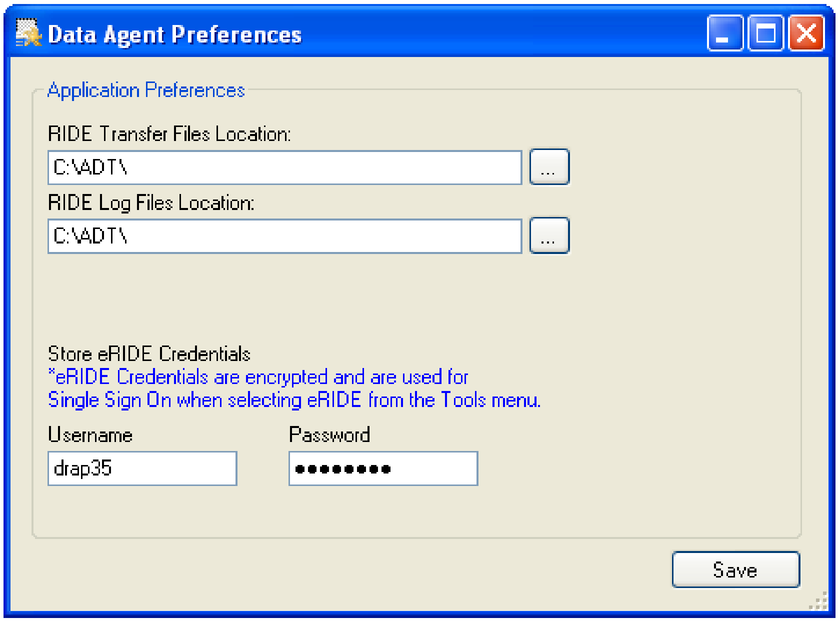
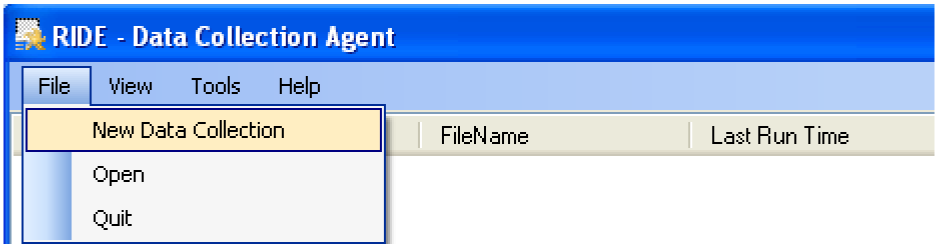
When the application launches for the first time you will be presented with the Data Agent Preferences dialog. This dialog requires you to enter preferences for the application. Click the **...** button to select the location you wish to store transfer files or type it in the textbox. Transfer files store the information specific to collections that you will be creating. Next, select the location you wish to store the log files. In this example, **C:\ADT** is the location for both the transfer files and the log files. eRIDE credentials, which are encrypted, are also entered on this screen; they are used to determine whether or not the application is online. Use the eRIDE **Username** and **Password** that you will be using to perform collections. Click the **Save** button to save the application preferences. Please note that if you change your password in eRIDE you will need to modify the saved password here.



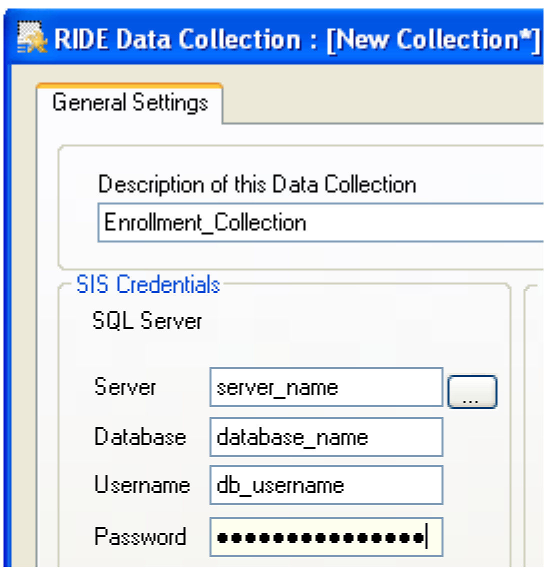
Under Start / Programs, please notice the addition of RIDE_DataAgent / RIDE_DataAgent.

Creating a New Data Collection

To create a new data collection select **New Data Collection** from the **File** menu as illustrated in the image below.

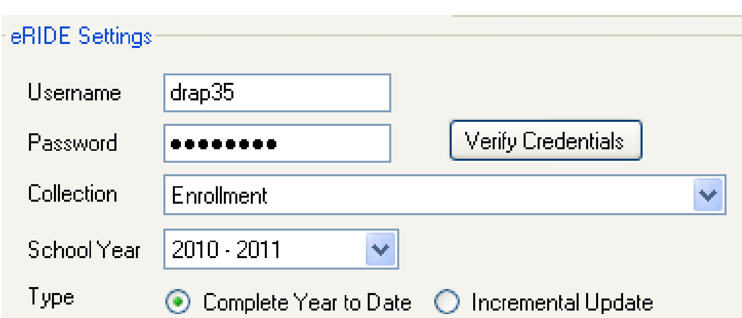


The **RIDE Data Collection** dialog will appear indicating that you are creating a [New Collection*] in the title bar. Enter a **description** for the collection. The next step in the process is to set the student information system credentials. If you are using SQL Server, enter the server name in the **Server** Text Field and the database name in the **Database** Text Field. Next, enter the **Username** and **Password** credentials in the appropriate fields.

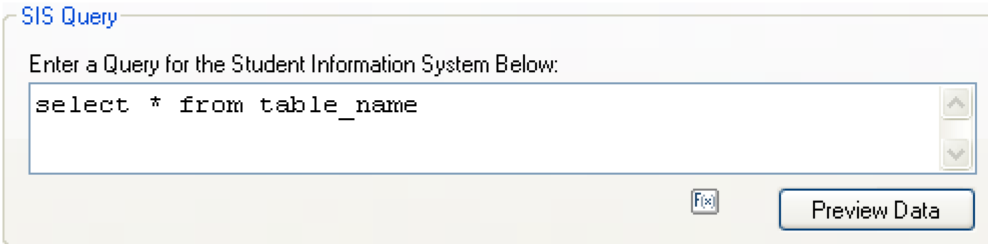


SQL username and passwords are encrypted when the file is saved.

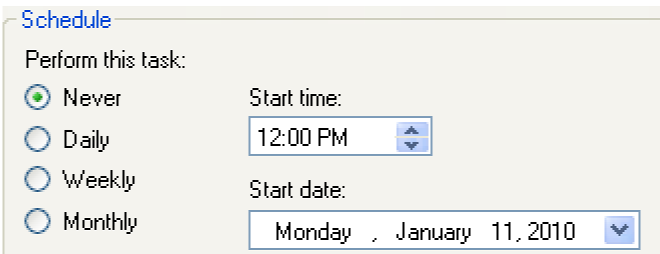
In order to validate and submit the data to RIDE, your eRIDE credentials must be entered in the **eRIDE Settings** group box. This account must have permission to perform data collection operations within eRIDE. To be certain that this is a valid account, click the **Verify Credentials** button. Select the type of **Collection** you are uploading data for; **Enrollment** is the default. Make sure that you select the **School Year** you wish to upload this data for (there will only be an option while we have two school years open at the same time, otherwise it defaults to the current school year). Choose **Complete Year to Date** submitting a complete set of records; choose **Incremental Update** when only submitting new or changed records.



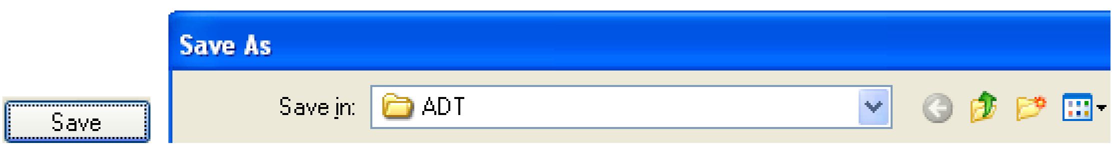
A SQL query must be issued to the Student Information System in order to retrieve data. Enter the SQL query in the **SIS Query** Text Box. For example: **select * from table_name**. This query will be specific to the schema of your Student Information System. The retrieved records should contain the required fields for the specified collection. Click F(x) if you want to use the Current Date as part of your query. Once the query is entered you may click the **Preview Data** button to ensure that the query executes correctly.



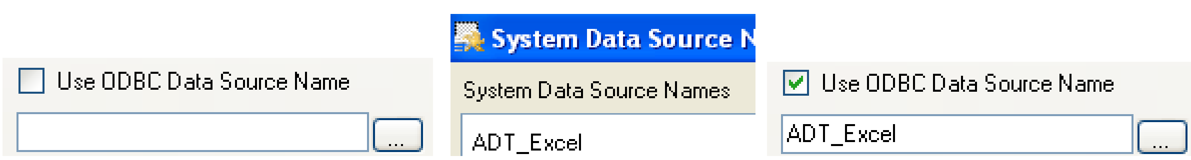
The **Schedule** group box provides the ability to schedule when this data collection will be executed. The collection may be scheduled to run daily, weekly, monthly, or never. The option to never run as a scheduled process is useful for testing purposes. You will be able to execute any data collection manually.



Next, save the file by clicking the **Save** button. Be certain to place the file in the **location** you specified in the Preferences dialog. If you do not, the file will not appear in the main screen of the application.



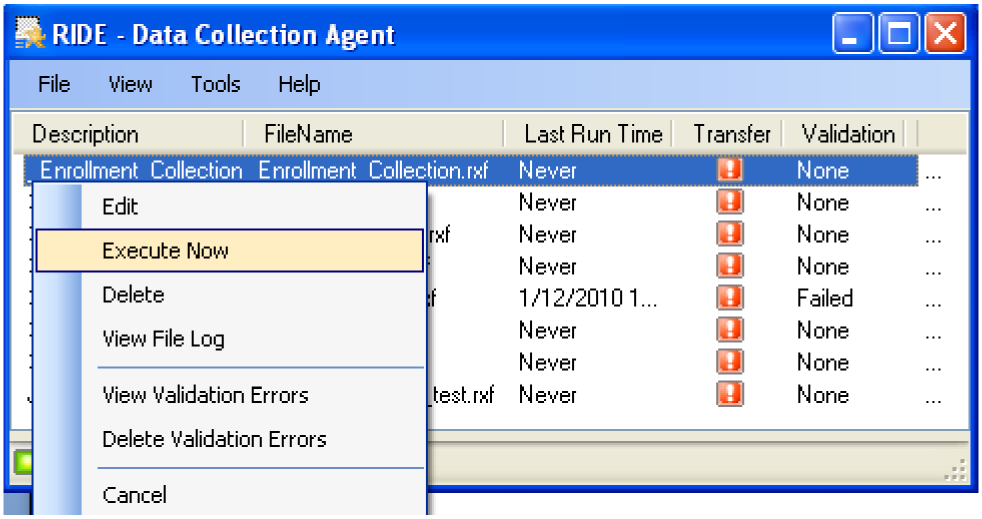
If you are not using SQL Server, you must select the **ODBC Data Source Name** checkbox. You can use Microsoft Excel files via the Microsoft Excel ODBC Driver or .csv files via the Microsoft Text Driver. Click **...** to see the available data sources once you have created the System DSN in the ODBC Data Source Administrator (instructions listed at the beginning of this document); double click the one you wish to use.

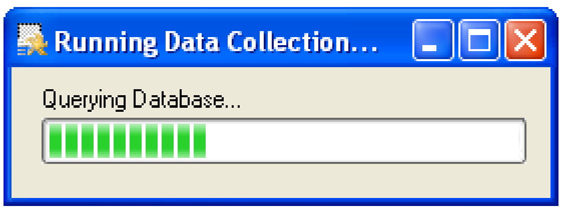


The query for Excel files is: **select * from [Sheet1$]** where Sheet1 is the name of the worksheet; make sure to use the $ after the worksheet name. The query for .csv files is: **select * from [enrollment.csv]** where enrollment.csv is the filename.

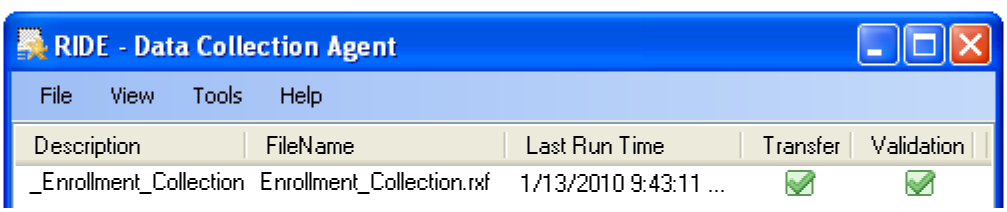
Executing a Data Collection Manually

The following dialog displays the context menu for Data Collections. Right click on the newly created data collection to see the context menu as seen below. Select the **Execute Now** menu item. A progress bar will appear.



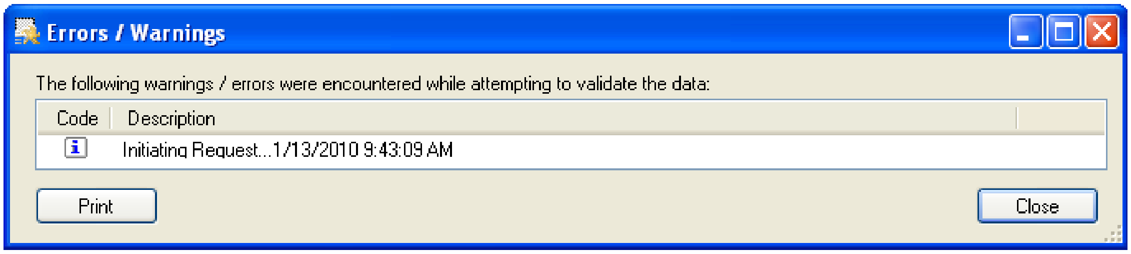


Once the collection has been executed the main screen will change to indicate success or failure. If the collection transferred successfully, the Transfer icon will appear as a green checkmark in the Transfer column. If the collection was validated and submitted successfully to RIDE, a green checkmark will appear in the Validation column. You will also receive an email titled: Data Service - Validation Successful. The transfer will be successful as long as it is under the 5% threshold.

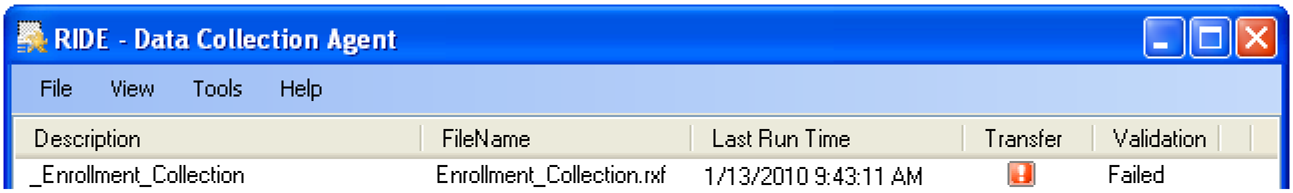


Viewing Validation Errors

Although the transfer was successful, it is important to regularly right click on the collection, select **View Validation Errors** to see if there were any errors. It is imperative that you correct these errors to ensure that we have all of the necessary data. Click on the **Print** button to print the validation errors.



If the collection fails, right click the collection to view the context menu. Select **View Validation Errors** to determine why the collection failed. The **View File Log** option may also be chosen to see more detailed information about transfer errors. You will also receive an email titled: Data Service - Validation Failed.



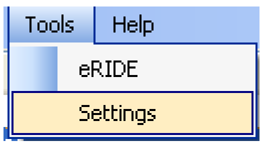
Items to Note

Is your ADT agent ready to run?

You will see the following icon on the bottom left of the ADT agent screen which means that it has been set up correctly, and is ready to run:

If the ADT agent is not ready to run, you will see the following in the same location of the screen:

If you see the 'Scheduler can not run.' warning, click on: Tools / Settings:



Make sure that you have your eRIDE Username and Password filled in; if not, enter this information and click Save:

It is important to make sure that the ADT agent is always running. It is important to be certain that you only have one instance of the ADT agent open; if you have multiple instances, your uploads will launch more than once. You may want to add this program to your startup routine to ensure that it will automatically open if the computer is rebooted. You will see the following icon in the notification area of your Windows toolbar:

Questions?

Contact the eRIDE Help Desk at: 222-8400 or helpdesk@ride.ri.gov.