

SchoolMint Hero Webinar

SFTP Connection and Imports on the
Updated Version of Hero



Welcome!



Amanda LaFleur
*Lead Customer
Experience Manager*



Alexis Lanier
*Sr. Professional Services
Specialist*

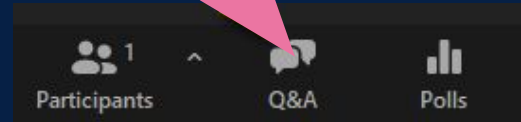


Logistics

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 schoolminthero.zendesk.com



Agenda

- **SFTP Connection**
- **Student Files**
- **Schedule Files**
- **Faculty Files**



Login to Hero

Let's get started:

1. Navigate to: **hero.schoolmint.com**
2. If your organization does not use Google for email: Click
If your organization does use Google for email: Click
3. Bookmark **Hero**

[FORGOT PASSWORD?](#)



[LOGIN WITH GOOGLE](#)

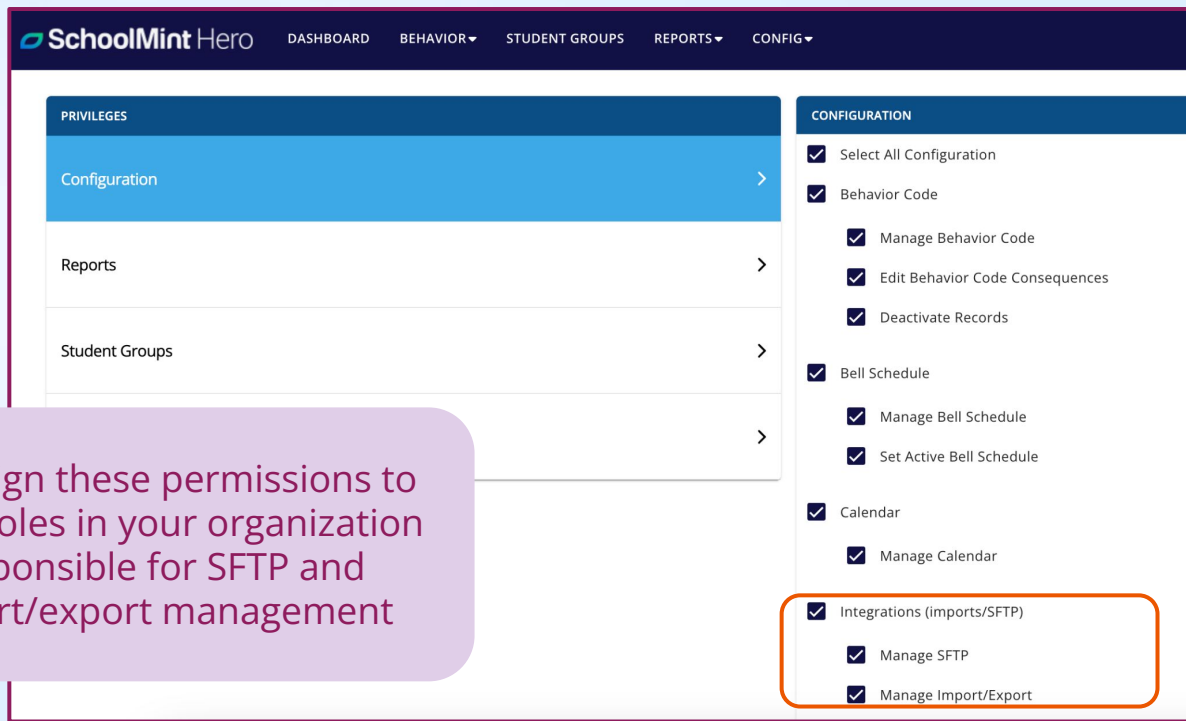


Permissions



Set Up User Permissions

Confirm that your School Admin and Group Admin roles have the 'Integrations' permissions enabled.



The screenshot displays the SchoolMint Hero web application interface. The top navigation bar includes the logo and menu items: DASHBOARD, BEHAVIOR, STUDENT GROUPS, REPORTS, and CONFIG. The left sidebar, titled 'PRIVILEGES', lists 'Configuration', 'Reports', and 'Student Groups'. The 'Configuration' section is expanded, showing a list of settings on the right. These settings include checkboxes for 'Select All Configuration', 'Behavior Code', 'Manage Behavior Code', 'Edit Behavior Code Consequences', 'Deactivate Records', 'Bell Schedule', 'Manage Bell Schedule', 'Set Active Bell Schedule', 'Calendar', 'Manage Calendar', 'Integrations (imports/SFTP)', 'Manage SFTP', and 'Manage Import/Export'. The 'Integrations (imports/SFTP)' section is highlighted with an orange border.

PRIVILEGES	CONFIGURATION
Configuration	<input checked="" type="checkbox"/> Select All Configuration
Reports	<input checked="" type="checkbox"/> Behavior Code
Student Groups	<input checked="" type="checkbox"/> Manage Behavior Code
	<input checked="" type="checkbox"/> Edit Behavior Code Consequences
	<input checked="" type="checkbox"/> Deactivate Records
	<input checked="" type="checkbox"/> Bell Schedule
	<input checked="" type="checkbox"/> Manage Bell Schedule
	<input checked="" type="checkbox"/> Set Active Bell Schedule
	<input checked="" type="checkbox"/> Calendar
	<input checked="" type="checkbox"/> Manage Calendar
	<input checked="" type="checkbox"/> Integrations (imports/SFTP)
	<input checked="" type="checkbox"/> Manage SFTP
	<input checked="" type="checkbox"/> Manage Import/Export

Or assign these permissions to other roles in your organization responsible for SFTP and import/export management



SFTP Connection



Creating SFTP Credentials

Config > Imports > Accounts > New Account

The screenshot shows the SchoolMint Hero dashboard. The browser address bar displays 'hero.schoolmint.com/dashboard/school'. The dashboard header includes the SchoolMint Hero logo, 'DASHBOARD', 'CONFIG', and a user profile for 'Alexis Robin'. The main content area is titled 'Dashboard' and contains several sections: 'TRACK A STUDENT' with input fields for First Name, Last Name, Grade, and ID Number, and a 'SEARCH' button; 'TODAY'S SCHEDULES' with an 'EDIT SCHEDULES' button; 'TOP PERFORMERS'; and 'TOP 5 BEHAVIOR CODES' with 'MONTHLY' and 'QUARTERLY' filters. A 'Need Help?' button is visible on the right side of the dashboard.

If creating credentials for **multiple schools** within your district or organization, toggle on **Group Level**

All **single site schools** should leave the Group Level setting **off**.



Finding SFTP Credentials

Config > Imports > Accounts

SFTP Accounts



Manage SFTP accounts.

SETTINGS

+ NEW ACCOUNT

School Group

School

Shared with school group

Actions

Hannah's School Group

Grand Teton Elementary School

No



SFTP Account

Host: sftp://sftp.hero.schoolmint.com

Port: 2022

Account ID: school_70_HMU0E19ROT2DhAMb

RESET PASSWORD



Prep Before Import



Set Up Your Import Job

Using your newly created SFTP credentials, you will need to create an export job in your SIS. The process to export to SFTP will vary by SIS.

Your export job should send 3 files to the SFTP folder titled:
imports

Student File

Schedule File

Staff (User) File



Reminder: Check your School IDs

Config > Schools > Accounts > New Account

School

Schools

Edit School

[BACK](#)[SAVE SCHOOL](#)[DEACTIVATE RECORDS](#)[SUBSCRIPTION](#)

SCHOOL INFORMATION

Name *	Grand Teton Elementary School	Address		Fax	
Active Terms	24-25	City			
Reference Id *	3301	State			
Timezone	Select Timezone	Zip			

Double check your schools Reference IDs to ensure they are accurate / up-to-date before importing



Import Student Files



District-Level Import

Config > Imports > Settings > New Import

[Click Here:
Help Article](#)

SFTP IMPORT SETTINGS

Group Level

School Level

Fiction Academy

School

✓ Account Found

User Import

Daily

Import Start Date

11/20/2024

Enter time

06:00 AM

UTC Time: 13:00:00

michelle.mcnamara@schoolmint.net

New email address...

SAVE SETTINGS

FILE UPLOAD

☒ Has Header

☐ Notify On Success

☐ Enable PGP Encryption

Max Missing Records %

Error Threshold %

fileName.csv

Important: The import file name CANNOT contain spaces, and MUST be the same as the name on the SFTP



School-Level Import

Config > Imports > Settings > New Import

[Click Here:
Help Article](#)

SFTP IMPORT SETTINGS

Group Level

School Level

Fiction Academy

Fiction Academy High School

✓ Account Found

User Import

Daily

Import Start Date

11/20/2024

Enter time

06:00 AM

UTC Time: 13:00:00

michelle.mcnamara@schoolmint.net

New email address...

SAVE SETTINGS

FILE UPLOAD

☒ Has Header ☐ Notify On Success ☐ Enable PGP Encryption

Max Missing Records %

Error Threshold %

fileName.csv

Important: The import file name CANNOT contain spaces, and MUST be the same as the name on the SFTP



Import Schedule Files

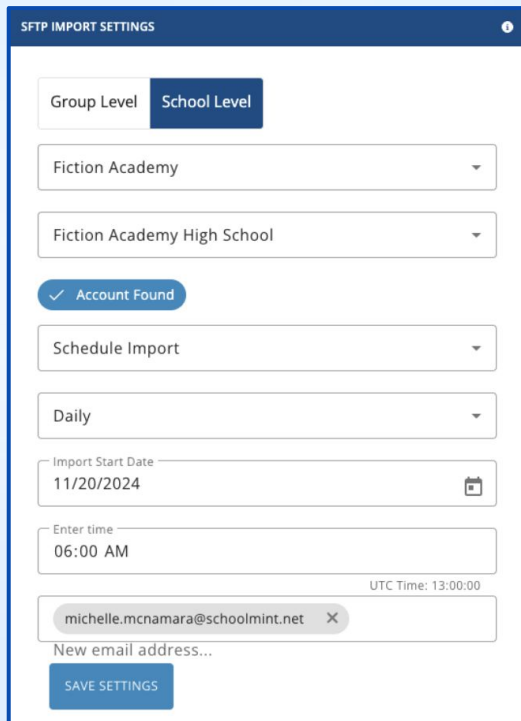


Mapping Student Schedules for Import

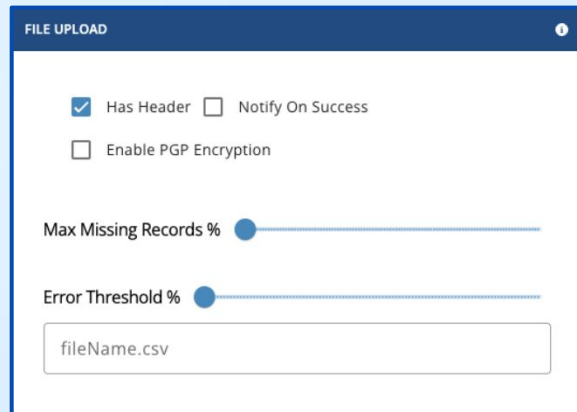
Config > Imports > Settings > New Import

[Click Here:
Help Article](#)

Important:
Schedule Imports
must happen AFTER
Students



The screenshot shows the 'SFTP IMPORT SETTINGS' form. It has two tabs: 'Group Level' and 'School Level', with 'School Level' selected. Below the tabs are two dropdown menus: the first is set to 'Fiction Academy' and the second to 'Fiction Academy High School'. A blue button with a checkmark and the text 'Account Found' is visible. Below this is a dropdown menu set to 'Schedule Import', followed by another dropdown menu set to 'Daily'. There is a date field for 'Import Start Date' with the value '11/20/2024' and a calendar icon. Below that is a time field for 'Enter time' with the value '06:00 AM'. A small text 'UTC Time: 13:00:00' is displayed. At the bottom, there is an email field with the value 'michelle.mcnamara@schoolmint.net' and a close button. Below the email field is a label 'New email address...' and a 'SAVE SETTINGS' button.



The screenshot shows the 'FILE UPLOAD' form. It has two checkboxes: 'Has Header' (checked) and 'Notify On Success' (unchecked). Below these is another checkbox 'Enable PGP Encryption' (unchecked). There are two sliders: 'Max Missing Records %' and 'Error Threshold %'. At the bottom is a text field for 'fileName.csv'.

Note: Schedule data can be imported at the district-level or the school-level, but you should choose the same option selected for student import



Import Faculty files



Mapping Faculty & Staff Data for Import

Required Fields & Example Sheet

	A	B	C	D	E	F	G	H	I
1	Email	Last	First	School	School Group	Instructor Code	Role	Type	
						8889			
						123			
						124			
						125			
						126			
						127			
						128			
						129			
						130			
						131			
						132			
						133			
						134			
15	Michelle.mcnamar	Bloom	Molly	Fiction Academy High School	Fiction Academy	135			
16	Michelle.mcnamar	Dean	Nelly	Fiction Academy High School	Fiction Academy	136			
17	Michelle.mcnamar	Holmes	Sherlock	Fiction Academy High School	Fiction Academy	138			
18									

Before beginning the import process, you will need to manually add two fields to the faculty/staff upload file.

1. Download the faculty file from your SIS or SFTP and open the file in your spreadsheet software (such as Excel or Numbers).
2. Add two columns to the spreadsheet titled **Role** and **Type**

Add 2
columns



Mapping Faculty & Staff Data for Import

Required Fields & Example Sheet

Add the role for each user, either **Teacher** or **School Admin**

If you have customized your roles, you will enter those **custom role names** here

	A	B	C	D	E	F	G	H	I
1	Email	Last	First	School	School Group	Instructor Code	Role	Type	
						8889	Teacher	teacher	
						123	Teacher	teacher	
						124	Teacher	teacher	
						125	School Admin	group-admin	
						126	School Admin	school	
						127	Teacher	teacher	
						128	Teacher	teacher	
						129	Teacher	teacher	
10	Michelle.mcnamar	Caulfield	Holden	Fiction Academy High School	Fiction Academy	130	Teacher	teacher	
11	Michelle.mcnamar	Eyre	Jane	Fiction Academy High School	Fiction Academy	131	Teacher	teacher	
12	Michelle.mcnamar	March	Jo	Fiction Academy High School	Fiction Academy	132	Teacher	teacher	
13	Michelle.mcnamar	Crowne	Lenina	Fiction Academy High School	Fiction Academy	133	Teacher	teacher	
14	Michelle.mcnamar	Owens	Lily	Fiction Academy High School	Fiction Academy	134	Teacher	teacher	
15	Michelle.mcnamar	Bloom	Molly	Fiction Academy High School	Fiction Academy	135	Teacher	teacher	
16	Michelle.mcnamar	Dean	Nelly	Fiction Academy High School	Fiction Academy	136	Teacher	teacher	
17	Michelle.mcnamar	Holmes	Sherlock	Fiction Academy High School	Fiction Academy	138	School Admin	school	
18									



Mapping Faculty & Staff Data for Import

Config > Imports > Settings > New Import

[Click Here:
Help Article](#)

SFTP IMPORT SETTINGS

Group Level

School Level

Fiction Academy

Fiction Academy High School

✓ Account Found

User Import

One Time

admin@school.com X New email address...

SAVE SETTINGS

FILE UPLOAD

☒ Has Header ☐ Notify On Success ☐ Enable PGP Encryption

Max Missing Records %

Error Threshold %

fileName.csv

Notes:

- Faculty files can NOT be set up on automatic imports. Just like on legacy Hero, these imports must be uploaded as a one-time import
- Imported users receive an email



Q&A

Survey



bit.ly/3lg5NjK



Q&A

Will our currently accounts and setup be transfered to the new version?	The following items were migrated to the updated version of Hero, allowing you to use your existing configurations for the 2025-2026 school year: Behavior Codes and Actions, Bell Schedules, Email Notifications Interventions, and Events. Students, Schedules, and Faculty Imports will need to be reconfigured on the updated version.
So the accounts used to log in will not be transfered, correct?	Correct! Accounts for students and staff will need to be created in the update Hero platform by following this import process.
I am a HERO user, I was wondering when will our SFTP information be added into the new platform.	You'll create your SFTP credentials in the updated version. Here's the article on how to create your credentials: https://schoolminthero.zendesk.com/hc/en-us/articles/27807793089691-SFTP-Setup-Instructions
I want to import into many school, I would choose group level?	Yes!
Where can we get a copy of the Google Sheets for importing all of the categories or do we all need to make our own to build from	You'll want to set up an export job in your SIS rather than populating a google sheet for import so that you have accurate and updated student and schedule files. Once you have your data on the SFTP, you'll proceed with your imports. Here's the article that includes the fields to include in your SIS export: https://schoolminthero.zendesk.com/hc/en-us/articles/28210302732187-SFTP-Data-Mapping-Information
My Admin account does not work and the forgot password does not work. Who do I contact?	Please contact another School Admin and ask to be added to your new Hero instance.
Will there be a link to CLEVER schools	You can reach out to our Technical Support Team and let them know that you would like to continue to share your data with Hero via Clever!
Can you show the new platform dashboard and how it operates?	We will have 2 more webinars that will dive more into the features of your new Hero platform!



Upcoming Webinars

July 15: Bell Schedules, Calendar View, & Exports

- Creating Bell Schedules
- Using Calendar View
- Writebacks

July 21: Relaunching in the Updated SchoolMint Hero

- Data Prep & Cleanup
- Behavior Configurations
- Kicking off the new school year



Resources

[Admin Migration Guide](#)

[SFTP Data Mapping Information](#)

[FAQ](#)

[Submit a Ticket](#)

[Walk Me](#)

Need Help?



How can we help you?



Type in your question...



Accrued Record Report



Add a User



Create Behavior Codes



Create Reactions



Creating or Editing Email Notifications



Manage Recurring Compliance Days

Helpdesk

Chat With Us!



Thank you!

