Data Synchronization: POS and IC

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SEEK

Grants

eRate

Meal

FRYSC

Assessment

Textbook waivers

Agenda

- What you need to do
  - Establish a process
- How you will know it's right
  - Quality assurance checks
  - Troubleshooting
- Where to get help
  - Guides and videos

Meal Status & IC FRAM

- Numerous federal and state reports (including SEEK) utilize meal status from Infinite Campus

- Meal Status originates from your Food Service POS system and is synchronized with Infinite Campus on a regular basis[1]

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[1] Those not affected will be districts who are district-wide Community Eligibility Provision (CEP) and any district who is using Infinite Campus as their POS

Data Synchronization

Data synchronization is a dance: everything must be carefully orchestrated to work properly.

Finding the match – POS Data Synch

The POS file is matching against what is in IC based on a ***key*** field. When both key fields equal each other a successful match occurs – and a meal status record is generated in Campus.

CEP Data Synchronization

Data synchronization must be adjusted depending on your CEP type

Mixed CEP Districts[1]

School	Action Required
Non-CEP	Upload both meal status and DC information (if using POS to import DC file)
CEP	Turn off data synchronization with Campus

Full CEP Districts

Action Required
Turn off the data synchronization with Campus

[1] IC POS users have a special setup; please contact Brad Blunt for details

Roles and Responsibilities

- Important to clarify roles and responsibilities with your process to ensure free/reduced data is accurate and complete in IC

Major Responsibilities

- Who will **download** the direct certification file?
- Who shall **set up** the data synch between POS and IC?
- Who will **check the accuracy** of free/reduced data in IC against food service POS?
- Who will periodically **check the POS import** for success of data synchronization and resolve errors?
- How we will **communicate** if there is a problem?

Ready! Set! Go!

1. Stop the POS import in IC

2. Roll forward your POS for SY 15-16

KEY!

3. Change the year to 15-16 in the IC data import mapping

4. Turn the data synchronization back on between your POS and IC

June: Stop the POS Import

Stop the scheduled imports in IC by placing "**" in front of Host IP address after the last day of school for students

FRAM>Eligibility Import Wizard>Scheduled Imports

Data Import Detail

Active

*Import Name: 12-13 POS Import

*Eligibility Import Mapping: POS Import

*User Name: jsmith

*Password: ••••••

*Protocol: SMB

*Host: **10.1.123.456

Domain: Kentucky

*Directory Path: //Imports/IC

The file name in this directory path must start with IC_Eligibility.

Frequency Type: Daily / Weekly / Monthly

Frequency

Scheduled Day

*Scheduled Time: 01:00 AM

Test Connection | Test Import | Run Import

Place double asterisks here

Deadline

July 1, 2015

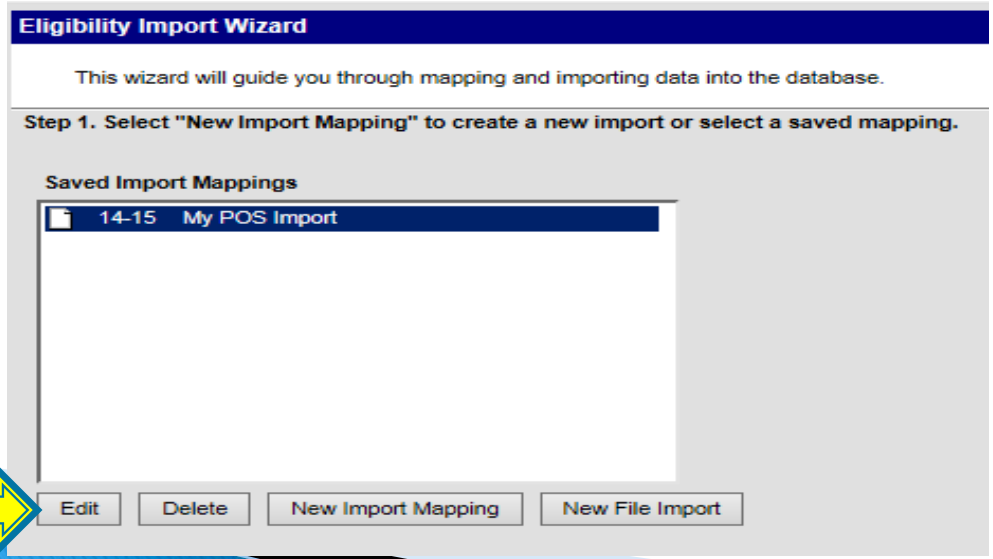
By July 1, 2015 you must **stop** the SY 14-15 import mapping or your data may be corrupted in IC.

Roll Forward – POS System

- The food service director should roll the POS system forward into SY 15-16
- Any meal status from the POS should then reflect SY 15-16
- Food Service Director should notify IT staff person responsible for Scheduled Imports when this is complete

Update Data Import Mapping

- The school year will need to be updated in the FRAM>Eligibility Import Wizard for SY 15-16
- Navigate to the Eligibility Import Wizard and select your current year's data import mapping
- Click "Edit"



Update Data Import Mapping

- ✓ Update the school year to SY 15-16

Eligibility Import Wizard

Step 2. Name the file, enter a selection for each option and upload a file to continue.

*Name
My POS Import

*School Year
14-15

Update to SY 15-16 here

*What is the file type?
Comma Separated Values

*Which field(s) in the data file will map to student identifiers?
State ID

*Is this a Direct Certification file?
Yes No

*Does file include headers?
Yes No

*Browse and select import file.
Browse... Upload & Continue

To save the new school year either import a file <u>or</u> click "Continue" if you have an existing file

File already exists on the server
D:\CampusDocumentStore\batchReports\batchQueue\staging_scramble\35124\2014-11-03-09-47-20\DidNotApply.csv Continue

Reactivate the Data Synch

- Remove the double asterisks to restart the synchronization
- Click “Save”
- Click “Test Connection” to ensure it works

Data Import Detail

Active

*Import Name: My POS Import Mapping

*Eligibility Import Mapping: My POS Import

*User Name: jsmith

*Password: •••••

*Protocol: SMB

*Host: **10.123.453

Domain: Kentucky

*Directory Path: //imports/IC

The file name in this directory path must start with IC_Eligibility.

Frequency Type: Daily / Weekly / Monthly

Frequency

Scheduled Day

*Scheduled Time: 01:00 AM

Test Connection | Test Import | Run Import

Remove the double asterisks here

Checklist

- ✓ Verify your data synchronization has been stopped **before** any rollover with the POS system
- ✓ After the POS rollover re-start the scheduled import process
- ✓ Check the scheduled import tool log file on a monthly basis
- ✓ Compare free, reduced and paid counts from the FRAM Eligibility report to the POS system; investigate any large differences

Troubleshooting

POS Data Synch: What could go wrong?

Shown below are common scenarios with data synchronization:

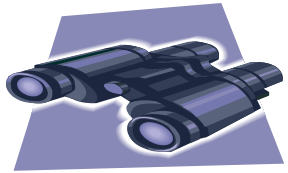
"The data synch has stopped working"

- ✓ Confirm that the username and password are correct under Scheduled Imports
- ✓ Verify that the file path/folder name has not changed
- ✓ Confirm that a file of "IC_Eligibility.txt" is being produced by the POS server

"My free/reduced percentage appears low in IC"

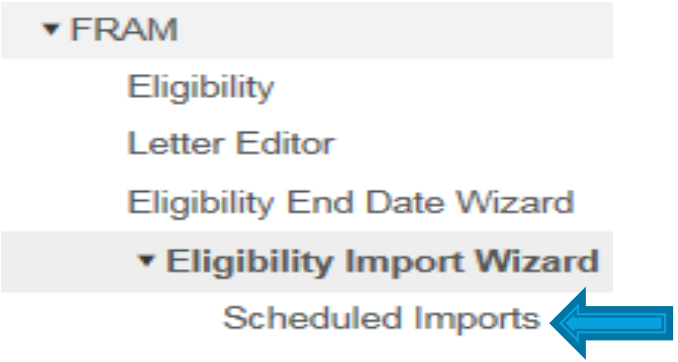
- ✓ Verify all values are mapped in POS import mapping
- ✓ Check when latest data synch was done under Scheduled Imports>Scheduled Import Log
- ✓ Spot check a few students without a meal status against POS

Finding the errors



Campus tracks the status of the data import from POS

- **Path:** FRAM > Eligibility Import Wizard > Scheduled Imports – Scheduled Import Logs



Finding the errors

- Scheduled Import Log
  - ‘Successful’ means the data imported in
  - Review **both** ‘Unsuccessful’ and ‘Successful’ import logs to search for data import errors

Scheduled Imports | Scheduled Import Logs

Clear Log | Clear All Logs

Data Import Editor

Scheduled Name	Import Name	Last Import Status	Date
Test	IC_Eligibility Report	Unsuccessful	07/12/2013

Data Import Log

Scheduled Name	Last Import Status	Timestamp
Test	Unsuccessful	07/12/2013 01:01:10 AM
Test	Unsuccessful	07/12/2013 01:01:07 AM
Test	Unsuccessful	07/11/2013 01:01:16 AM
Test	Unsuccessful	07/11/2013 01:01:04 AM
Test	Unsuccessful	07/10/2013 01:01:11 AM
Test	Unsuccessful	07/10/2013 01:01:08 AM
Test	Unsuccessful	07/09/2013 01:01:11 AM
Test	Unsuccessful	07/09/2013 01:01:08 AM
Test	Unsuccessful	07/08/2013 01:01:03 AM
Test	Unsuccessful	07/08/2013 01:01:03 AM
Test	Unsuccessful	07/07/2013 01:01:06 AM

Click on the task name to see the details

Click on the log file to review the data synch report

IC Eligibility Import Report

Kentucky State
Generated on 07/12/2013 10:54:02 AM Page 1 of 43

Eligibility Import Report

Focus on any errors/warnings

THIS IS A TEST. NO DATA IS WRITTEN TO THE DB.

Summary

New	Ended	Removed	Existing	Errors/Warnings
0	0	0	1594	13

Updated Records

Name	School Year	S

Error/Warning

Line 187. ERROR 1001 - State ID '406 not found
Line 365. ERROR 1001 - State ID '401 not found
Line 380. ERROR 2001 - Multiple matches found for Stu
Line 400. ERROR 2001 - Multiple matches found for Stu
Line 660. ERROR 1001 - State ID ' ' not found
Line 663. ERROR 2001 - Multiple matches found for Stu
Line 920. ERROR 2001 - Multiple matches found for Student State ID (2 matches).
Line 926. ERROR 2001 - Multiple matches found for Student State ID (2 matches)
Line 1268. ERROR 2001 - Multiple matches found for St
Line 155. WARNING 3037 - : The record updated with the Direct Type.
Line 156. WARNING 3037 - The record updated with the Direct Type.
Line 1203 WARNING 3037 The record updated with the Direct Type.

Existing Eligibility Records

Name	School Year	Start Date	End Date	Eligibility Type	Eligibility	Source	Certified Type
						Non-Direct	Did Not Apply
						Direct	SNAP
						Non-Direct	Did Not Apply

POS Import Only: **Preschool student SSNs! These should have SSIDs: follow KDE data entry instructions for enrolling preschool students in Infinite Campus; incorrect SSIDs in the POS need to be corrected with what is in Campus**

Duplicate SSIDs in IC; student enrollment records need to be merged

Warnings are FYI only; can generally be ignored

Resolution for Common Messages

Issue	Resolution
State ID “XXXXXXXXXX” not found	Determine student SSID in IC and then assign that SSID in POS; If student is enrolled then assign SSID to student following KDE data standards
Multiple matches found for State Student ID “XXXXXXXXXX”	Merge records in Infinite Campus following district policy on merging
Record contains End Date before Start Date	Ensure the data import mapping has the correct school year chosen in the Eligibility Import Wizard; Verify the POS data extract file is for SY 15-16
ERROR ##### Invalid [FieldName]	Locate the errant record: review the data import mapping to ensure all data values are mapped
WARNING XXXX	Warnings are for your info: can be viewed and generally ignored

Useful Ad Hoc Reports

Several useful ad hoc reports have been placed under the "State Published" folder in IC

- FRAM Transposed Meal Eligibility Dates
  - Locates records where the meal status data was imported into the wrong school year
- FRAM Missing Meal Eligibility Records – District
- FRAM Missing Meal Eligibility Records – School
  - High counts of missing meal eligibility records may signify a problem within the school and/or district

Resources

Technical Reference Guidance

http://education.ky.gov/federal/SCN/Pages/Technical-Reference.aspx

Campus Community

http://community.infinitecampus.com/home/

Contact Information:

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