



# Data Synchronization Point-of-Sale and Infinite Campus

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KSIS End-of-Year Training April 21, 2016

This session will focus on data synchronization between your food service POS and Campus.

# Why this is important

- ▶ Quality data impacts the districts
  - Testing
  - Student fee waivers
  - SEEK At Risk
  - State and federal programs



# 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



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Here is our agenda. My primary themes will be the essential steps you need to take for the end of the year and where to get help if you need it. I've worked to simplify what needs to be done and highlight the areas that merit your attention.

# Meal Status & IC FRAM

- Meal Status originates from your Food Service POS system and is synchronized with Infinite Campus on a regular basis<sup>1</sup>

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<sup>1</sup> 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



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Numerous federal and state reports utilize meal status from Campus, which is the system of record. For districts not using Infinite Campus as their POS or those participating district-wide in Community Eligibility – the meal status must be imported from the food service 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.



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In a ballroom dance each partner knows the steps they must take: they have clearly defined roles. The same is true with the POS and Campus. The premise of data synchronization is that two systems share data with each other based on a common field. The data transfer occurs based on a match with that common field. Between your food service POS and Campus that common field is the student state ID. Having that information in both systems allows them to communicate with each other. Using the SSID is fast, simple and leads to fewer errors than other possible matching criteria.

# CEP Data Synchronization

Data synchronization must be adjusted depending on your CEP type

## Partial CEP Districts<sup>1</sup>

| 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 |

<sup>1</sup>IC POS users have a special setup; please contact Brad Blunt for details



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We have over 130 districts on the Community Eligibility Provision. In this provision all students eat their meals at no charge. Reimbursement is based on the percentage of directly certified students in your district. Food service does not collect household applications in this case. A HIF form is collected to obtain the socioeconomic status of students and is processed in Campus. As such you will need to turn off the data import between the POS and Campus. Shown above are the criteria based on your situation – partial or full CEP.

# 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 will **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?



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At the outset of any project you need to determine who will be your resources – and what responsibilities they will have. Depending on your needs, data synchronization and DC imports require a team approach. This list – which is not all encompassing - shows some areas that need to be discussed. The goal is to promote ownership and avoid finger pointing. And if the workload can be shared that helps a great deal. Who does the work depends on the district. Some districts have their IT staff heavily involved and others rely on the food service director. The best approach is what works for your district. A key point is for proper set up at the beginning of year and perform regular monitoring thereafter.

# Ready! Set! Go!

1. Stop the POS import in IC

2. Roll forward your POS for SY 16-17

**KEY!**

3. Change the year to 16-17 in the IC data import mapping

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

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 SUCCESS

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Four easy steps to update your IC settings for POS data import:

1. Stop POS import in IC
2. Roll the food service POS forward for SY 16-17
3. Change the year to 16-17 in your IC data import mapping
4. Turn the data synch back on in IC

Let's discuss the steps in further detail

# 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

\*Protocol SMB \*Host \*\*10.1.123.456

\*Password \*\*\*\*\*

Domain Kentucky

\*Directory Path //Imports/IC The file name in this directory path must start with IC\_Eligibility.

Frequency Type Frequency Scheduled Day \*Scheduled Time

Daily  Weekly  Monthly

Test Connection Test Import Run Import

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Begin by stopping the data import after the last day of school for students. The easiest means to do this is to place double asterisks in the Scheduled Imports tool for the host IP address– then click “Save”.

Per Campus, note that removing the “Active” checkbox checkmark will not stop the data import process. The optimal means is to use the double asterisks.

# Deadline

# July 1, 2016



By July 1, 2016 you must **stop** the SY 15-16 import mapping or your data may be corrupted in IC.



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The data import mapping must be updated by July 1, 2016

Why? If you allow the POS to import the current school year's meal status into Campus with the prior year marked in the import mapping – this corrupts the data in IC for the prior year.

# Roll Forward – POS System

- ✓ The food service director should roll the POS system forward into SY 16-17
- ✓ Any meal status from the POS should then reflect SY 16-17
- ✓ Food Service Director should notify IT staff person responsible for Scheduled Imports when this is complete



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Food Service will roll their POS system into SY 16-17, preparing to process applications beginning July 1. When that is finished, Food Service should notify the KSIS contact that the POS is ready for SY 16-17.

# Update Data Import Mapping

- ✓ The school year will need to be updated in the *FRAM>Eligibility Import Wizard* for SY 16-17
- ✓ Navigate to the Eligibility Import Wizard and select your current year's data import mapping
- ✓ Click "Edit"



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The Eligibility Import Wizard should be updated for SY 16-17. To do this:

- Navigate to *FRAM>Eligibility Import Wizard*.
- Select the current data import mapping and click "Edit".

# Update Data Import Mapping

- ✓ Update the school year to SY 16-17

The screenshot shows the 'Eligibility Import Wizard' interface. It includes the following fields and options:

- Name:** Text input field containing 'POS Import'.
- School Year:** Dropdown menu currently set to '15-16'. A blue callout bubble points to this field with the text 'Update to SY 16-17 here'.
- What is the file type?:** Dropdown menu set to 'Comma Separated Values'.
- Which field(s) in the data file will map to student identifiers?:** Dropdown menu set to 'State ID'.
- Is this a Direct Certification file?:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Does file include headers?:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Browse and select import file:** A file selection area with a 'Browse...' button and an 'Upload & Continue' button.

A second blue callout bubble points to the 'Upload & Continue' button with the text: 'To save the new school year either import a file or click "Continue" if you have an existing file'.

At the bottom of the wizard, a message states: 'File already exists on the server' followed by the file path: 'D:\CampusDocumentStore\batch\Reports\batchQueue\staging\_scramble\36643\2015-12-15-09-57-40\SGNDC\_HISTORY\_DCEXTEND\_2015\_JUL\_BBLUNT\_SCRAMBLED.csv' and a 'Continue' button.



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Under "School Year" select 16-17. To save your changes, either import a POS data extract file or click "Continue" if you have an existing file on the server.

**Question:** Will I need to update any other values for the POS data import mapping?  
No, not if you are keeping your same POS system. The data values you mapped for the POS import file in SY 15-16 should remain the same.

# Reactivate the Data Synch

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

The screenshot shows the 'Data Import Detail' form with the following fields and values:

- Active:**
- \*Import Name:** My POS Import Mapping
- \*Eligibility Import Mapping:** My POS Import
- \*User Name:** jsmith
- \*Protocol:** SMB
- \*Host:** \*\*10.123.453 (A blue callout bubble points to this field with the text 'Remove the double asterisks here')
- \*Password:** \*\*\*\*\*
- Domain:** Kentucky
- \*Directory Path:** //imports/IC (A red note below this field states: 'The file name in this directory path must start with IC\_Eligibility.')  
**Frequency Type:** Frequency
- Frequency:** (dropdown menu)
- Scheduled Day:** (dropdown menu)
- \*Scheduled Time:** 01:00 AM
- Frequency Selection:**  Daily,  Weekly,  Monthly

At the bottom of the form are three buttons: 'Test Connection', 'Test Import', and 'Run Import'. A yellow arrow points to the 'Test Connection' button.

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Finally, remove the double asterisks and click “Test Connection” to ensure the import is working properly. If you changed servers the IP address may need to be changed under “Host”. Click “Save”

# Checklist



- ✓ Verify your data synchronization between POS and IC has been stopped **before** any rollover with the POS system
- ✓ After the POS rollover, re-start the scheduled import process after updating the data import template
- ✓ 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



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Here is a brief checklist of items that should be done during the POS data import update process. You will stop the data synchronization, perform the POS rollover, adjust the data import mapping to SY 16-17, and then re-start the data synchronization. The POS file import should be checked at least on a monthly basis to ensure it's working properly. Finally, you can check the free/reduced/paid counts to the POS.

# Troubleshooting



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Here is a set of slides to assist in troubleshooting.

# POS Data Synch: What could go wrong?

Shown below are common scenarios with data synchronization:

## **“The data synch has stopped working”**

- ✓ Confirm the username and password are correct under Scheduled Imports
- ✓ Verify the file path/folder name has not changed
- ✓ Confirm 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



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When something appears awry, here are a few areas to check for a diagnosis. I would begin with the FRAM Scheduled Import Log. Look there to see when the last successful synch was done. If that has been unsuccessful, then you can look at what is wrong with the communication between the POS and IC. Presuming it's worked in the past – you want to check the configuration hasn't changed: verify the username and password are correct; the folder name for the IC Eligibility file is still the same, a file is being produced since the rollover, and - if you have a new POS server – your IP address for the server is the same as before.

If you have low free/reduced percentages - look at your POS import mapping under the Eligibility Import Wizard: select your import mapping and import the most current IC Eligibility file. Ensure that no values are missing from the mapping (homeless, migrant, etc.). Then you will want to verify the Scheduled Import log as well for any errors that need to be resolved.

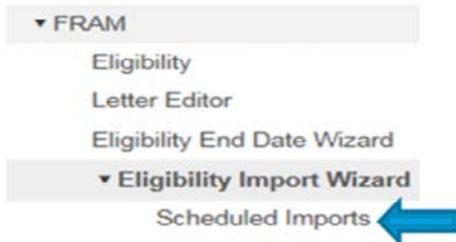
We'll discuss that in further detail.

# Finding the errors



Campus tracks the status of the data import from POS

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



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I want to discuss the Schedule Import Log in further detail and give you resolution steps for the common errors. Locate the scheduled import log by going to *FRAM>Eligibility Import Wizard>Scheduled Imports*. You may need to ask your IC contact person in the district for rights to this tool.

# Finding the errors

- ▶ Scheduled Import Log
  - 'Successful' means the data imported
  - 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 |
|----------------|-------------|--------------------------|
| Import         | IC POS      | Successful 04/15/2016    |

Data Import Log

| Import | Successful | Last Import Status     | Timestamp |
|--------|------------|------------------------|-----------|
| Import | Successful | 04/15/2016 01:00:00 AM |           |
| Import | Successful | 04/14/2016 01:00:00 AM |           |
| Import | Successful | 04/13/2016 01:00:00 AM |           |
| Import | Successful | 04/12/2016 01:00:00 AM |           |
| Import | Successful | 04/11/2016 01:00:00 AM |           |
| Import | Successful | 04/10/2016 01:00:00 AM |           |
| Import | Successful | 04/09/2016 01:00:00 AM |           |
| Import | Successful | 04/08/2016 01:00:00 AM |           |
| Import | Successful | 04/07/2016 01:00:00 AM |           |

Click on the task name to see the details

Click on the log file to review the data synch report

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On the second tab you will click on the first entry to see the details. Then click on the latest log file to view the details. . You should review this even if you have a successful import – as you may have issues with your POS import mapping. The report shows the details of the scheduled import, as shown on the next slide.

# IC Eligibility Import Report

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

Focus on any errors/warnings

**Summary**

| New | Ended | Removed | Existing | Errors/Warnings |
|-----|-------|---------|----------|-----------------|
| 0   | 0     | 0       | 1504     | 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 400  | ERROR 2001 - Multiple matches found for Stu              |
| Line 560  | 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 |
| Line 926  | ERROR 2001 - Multiple matches found for Student State ID |
| Line 1268 | ERROR 2001 - Multiple matches found for S                |
| Line 155  | WARNING 3037 - The record c                              |
| Line 156  | WARNING 3037 - The record c                              |
| Line 1200 | WARNING 3037 - The record c                              |

**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**

updated with the Direct Type.  
 updated with the Direct Type.  
 updated with the Direct Type.

**Existing Eligibility Records**

| Name  | School Year | Start Date | End Date | Eligibility Type | Eligibility | Source     | Certified Type |
|---|-------------|------------|----------|------------------|-------------|------------|----------------|
| Warnings are FYI only; can generally be ignored |             |            |          |                  |             | Non-Direct | Did Not Apply  |
|   |             |            |          |                  |             | Direct     | SNAP           |
|   |             |            |          |                  |             | Non-Direct | Did Not Apply  |

Here is the data import report from Campus. You'll see a similar report for the DC imports as well as the POS data synchronization. The concepts are the same: what was successful and unsuccessful. Scroll down the report until you see "Error/Warning" section. Focus on the errors.

For your POS import you are matching on the SSID from the POS against Campus. The SSIDs must be an exact match. Any mismatch will result in an error. In the example above the preschool students have a social security number assigned to them – and they should have an SSID. They need to be enrolled in Campus to obtain that. If the student has what appears to be a valid SSID and the entry of "State ID" not found appears then a discrepancy exists between Campus and your POS. Change the SSID in your POS to match what is in Campus.

Duplicate entries show as "Multiple matches" found. Merge those enrollment records in Campus. You can generally ignore the warnings in Campus.

# 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 an SSID to the 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 <b>SY 16-17</b> |
| 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 only: can be viewed and generally ignored  |

SUCCESS

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Here is a general overview of common errors. We've discussed the state ID and multiple matches. With the end date before the start date – you are attempting to import the prior school year POS data extract into the current school year. With an invalid field name you have a record type (e.g., Medicaid) that is being imported from your POS system but is not included on the POS import mapping. To fix this, import the current POS data synch file and map the "Medicaid" value. As noted earlier, you can generally ignore the warning messages.

# 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



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KDE has assembled a list of useful ad hoc reports and placed them under the “State Published” folder in the Ad Hoc filter tool in Campus. Here are the most helpful. The transposed meal eligibility dates shows a list of students with transposed meal eligibility dates. You can then review these further. The set of filters for missing meal eligibility records list which students do not have a meal status record. If the student doesn’t have a meal status record then they will receive a default value of “paid”.

# Resources

## Technical Reference Guidance

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

## Campus Community

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

## Contact Information:

Brad Blunt ([brad.blunt@education.ky.gov](mailto:brad.blunt@education.ky.gov))



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Here is a list of resources. I will be available to assist you as well.