

# SFTP Synchronization Setup and Use

Learning Genie Sep 2020

# Set up SFTP Sync

Click the button to get started with SFTP set-up, which are completed with 4 steps

The screenshot shows a user interface for an administrative system. At the top, there is a navigation bar with a logo on the left and menu items: Home, Dashboard, Manage Portfolio, Manage Family Engagement, and Lessons. On the right of the navigation bar, there is a notification bell icon and a user profile for Jane Ilo. A teal sidebar on the left contains 'Admin Setting' and a list of menu items: Import/Sync, Rating Period, Manage Center, Manage Staff, Manage Children, Daily Health Card, Manage In-Kind, Custom Portfolio Tags, Custom Children Attributes, Manage Learning Media, Push Settings, Merge Account, and Transfer Account. The main content area is titled 'Import/Sync' with a help icon. Below the title is a paragraph of text: 'If any child has been added manually by teachers (instead of being imported), please ensure the child's first name, last name, and birthday match those on the roster files. Otherwise there will be a duplicate of the child.' To the right of this text are two buttons: 'Set-up SFTP Sync in SIS' (with a 'new' badge) and 'Import History'. A red arrow points to the 'Set-up SFTP Sync in SIS' button. Below the text is an information icon followed by the text: 'Our SFTP sync will conduct a nightly sync of your uploaded roster file. Email confirmation and alerts will be sent you as well.' Below this are six boxes representing different data sources: 'ChildPlus.net Professional Head Start Management Software', 'Import from DRDPtech', 'PowerSchool', 'CenterTrack by Controltec' (with a 'Learn More About CenterTrack' link below it), 'PROMIS', and 'Other' (with a plus icon in a document box).

# Step 1: Import Template Verification

User can upload the CSV roster file directly to sync or enter children information in a template and sync the template.

The screenshot displays the SFTP Sync interface. At the top, a navigation bar includes a home icon, 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', 'Lessons', 'Attendance', 'Daily Health Card Stats', a notification bell, and the user profile 'Heather McCook'. A teal sidebar on the left lists various administrative functions, with 'Import/Sync' selected. The main content area is titled 'SFTP Sync' and features a four-step progress indicator: 1. Import Template Verification (active), 2. Set up SFTP Server, 3. File Test, and 4. Setup Completion. Below the progress indicator, the section is titled 'Import Template Verification'. The text explains that SFTP sync roster files must be Generic CSV and provides instructions on ensuring data integrity and downloading a template. Two buttons, 'PDF instruction guid' and 'Download Template', are provided. At the bottom, there is a file upload area with a 'Select file' button, the text 'No file yet', and an 'Upload' button.

Admin Setting

Home Dashboard Manage Portfolio Manage Family Engagement Lessons Attendance Daily Health Card Stats Heather McCook

SFTP Sync

1 Import Template Verification 2 Set up SFTP Server 3 File Test 4 Setup Completion

### Import Template Verification

SFTP sync roster file can only be Generic CSV (any csv files from student information system or Roster Management System). And please ensure there isn't information missing in your roster file before importing. Unsure about the format? Download the roster Template here. You can also read this PDF instruction guide, which explains how to import files through SFTP.

PDF instruction guid Download Template

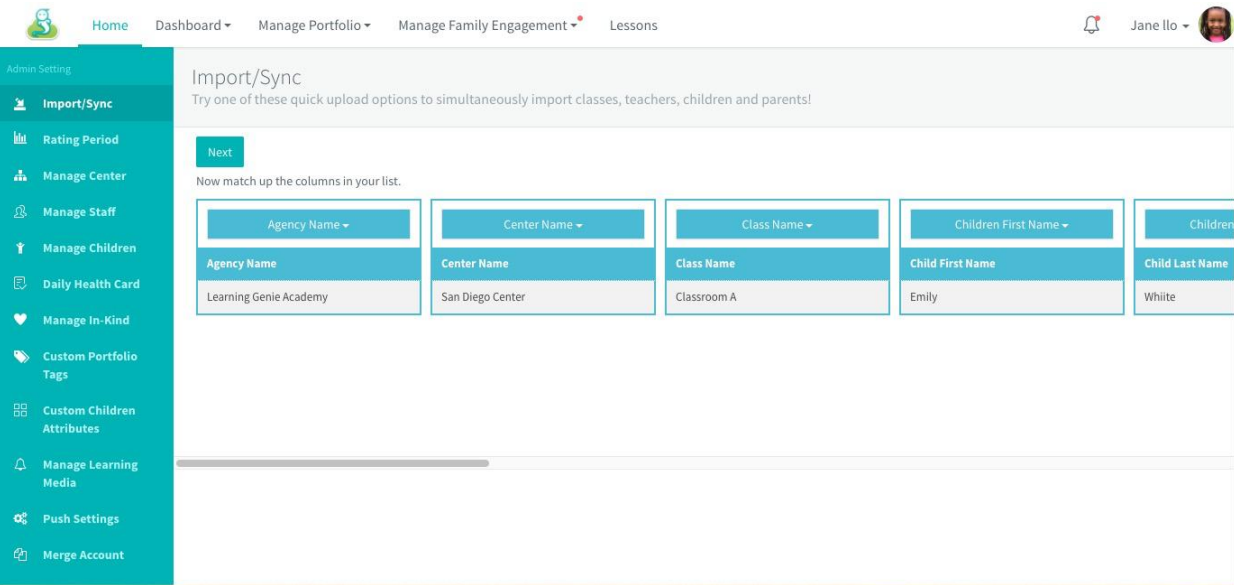
Select file No file yet Upload

## Step1 : Tips for applying the Template

- If you have already setup the roster query to be used in Learning Genie previously, you can use the latest exported roster file instead of use the template output.
- The template is the minimum required fields you are required to put into Learning Genie.

# Step 1: Import Template Verification

1. Other type of CSV file template verification process: Match up the column titles --> a review of roster update in a PDF file--> set up the new classes with rating frameworks (ignore it if no new classes) --> Completion
2. Purpose: ensure the roster file format and column titles go with the template. User can validate children information in a PDF file



Import/Sync

Try one of these quick upload options to simultaneously import classes, teachers, children and parents!

**Next**

Now match up the columns in your list.

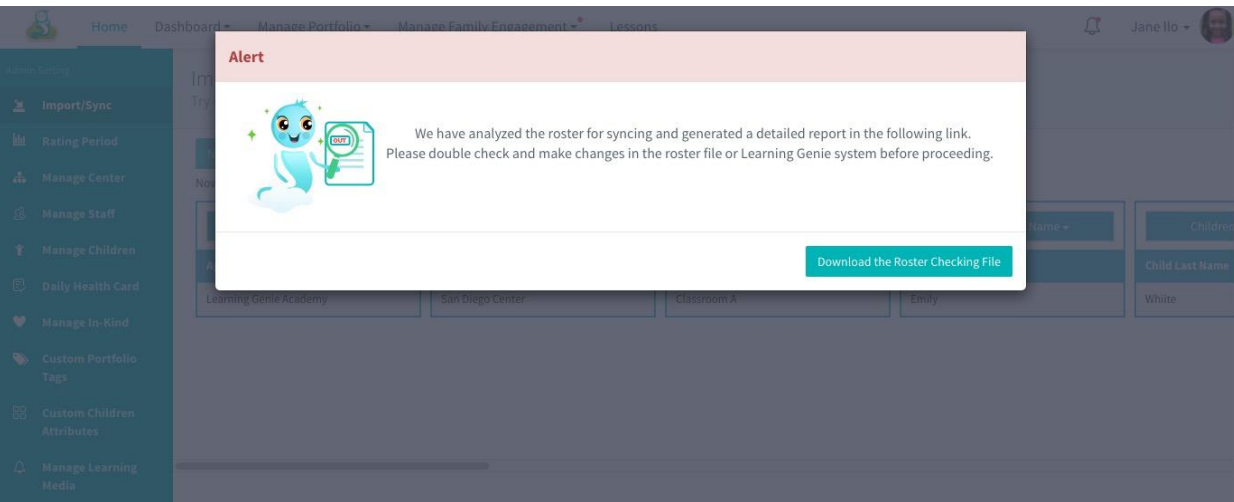
Agency Name	Center Name	Class Name	Children First Name	Children
Learning Genie Academy	San Diego Center	Classroom A	Emily	White



Confirm the Mapping of the Columns

From Learning Genie	From .csv file
Agency Name	Agency Name
Center Name	Center Name
Class Name	Class Name
Children First Name	Child First Name
Children Last Name	Child Last Name
Birthday	Birthday
Gender	Gender
Entry Date	Enrollment Date

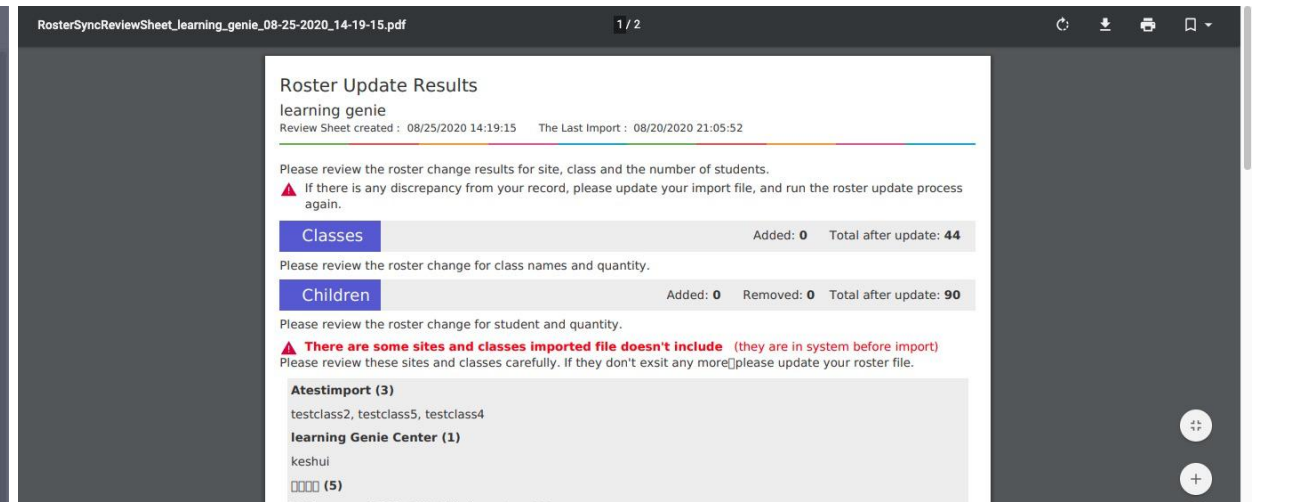
Back Confirm



Alert

We have analyzed the roster for syncing and generated a detailed report in the following link. Please double check and make changes in the roster file or Learning Genie system before proceeding.

[Download the Roster Checking File](#)



RosterSyncReviewSheet\_learning\_genie\_08-25-2020\_14-19-15.pdf

1 / 2

### Roster Update Results

learning genie

Review Sheet created : 08/25/2020 14:19:15 The Last Import : 08/20/2020 21:05:52

Please review the roster change results for site, class and the number of students.

⚠ If there is any discrepancy from your record, please update your import file, and run the roster update process again.

**Classes** Added: 0 Total after update: 44

Please review the roster change for class names and quantity.

**Children** Added: 0 Removed: 0 Total after update: 90

Please review the roster change for student and quantity.

⚠ **There are some sites and classes imported file doesn't include** (they are in system before import)  
Please review these sites and classes carefully. If they don't exist any more, please update your roster file.

**Atestimport (3)**

testclass2, testclass5, testclass4

**learning Genie Center (1)**

keshui

□□□□ (5)

# Step 1: Import Template Verification

Setting new classes in the roster file up with frameworks

Added an option “ apply to all sites in the agency” checked when to set rating frameworks for new classes being imported

The screenshot shows the 'Import/Sync' page in a management system. The top navigation bar includes 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. The user 'Jane Ilo' is logged in. The left sidebar lists various administrative tasks. The main content area is titled 'Import/Sync' and includes a search bar with 'learning genie' and a dropdown for 'San Diego Center2'. Below this, the 'Site Student' section shows 'Classroom A' as the selected class and 'DRDP2015-PRESCHOOL' as the class rating framework. Two radio buttons are present: 'Apply to all classes in the center' (unselected) and 'Apply to all centers in the agency' (selected). A red arrow points to the selected radio button. The 'Teachers' section is currently empty, and the 'Students' section shows a table with one entry for 'Emily White'.

**Admin Setting**

- Import/Sync
- Rating Period
- Manage Center
- Manage Staff
- Manage Children
- Daily Health Card
- Manage In-Kind
- Custom Portfolio Tags
- Custom Children Attributes
- Manage Learning Media
- Push Settings
- Merge Account

## Import/Sync

If any child has been added manually by teachers (instead of being imported), please ensure the child's first name, last name, and birthday match those on the roster files. Otherwise there will be a duplicate of the child.

The Last Import **Jane Ilo** at **08/20/2020 21:05:52**

learning genie

San Diego Center2 **new**

### Site Student

Class **Classroom A** **new**

Class rating framework

DRDP2015-PRESCHOOL

Apply to all classes in the center

Apply to all centers in the agency

### Teachers

Teacher First Name	Teacher Last Name	Teacher Email
There is no data yet		

Click to create teachers' accounts directly.

### Students

	Children First Name	Children Last Name	Date of Birth	Status	Prim.
<input checked="" type="checkbox"/>	Emily	White	12/31/2015	In to be transferred from San Diego Center	

# Step 1: Import Template Verification

1. After the import template is verified with roster file imported, click button “ Go to set up SFTP Server”to the next step
2. Take a view of the children count change in the roster import report

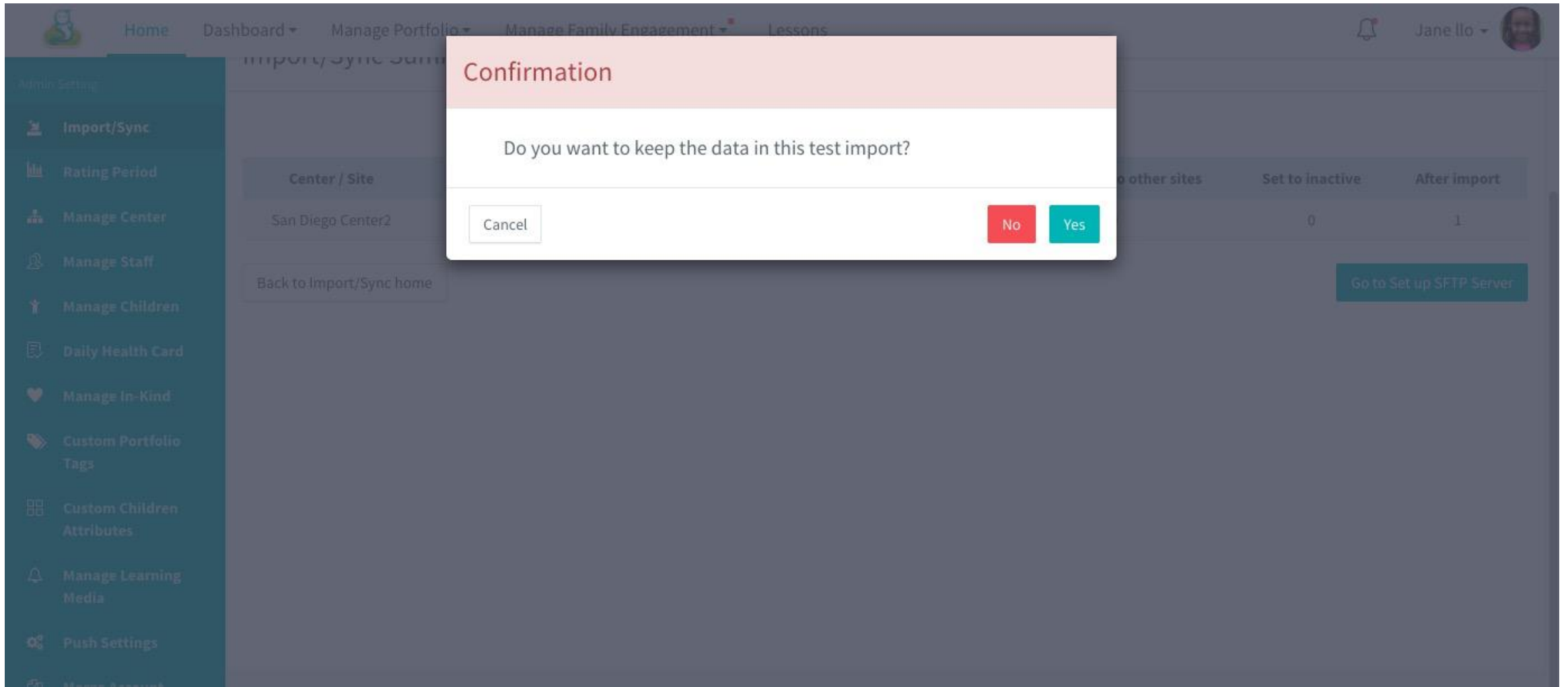
The screenshot displays the 'Import/Sync' page in a software interface. The page features a teal sidebar with navigation options: Admin Setting, Import/Sync, Rating Period, Manage Center, Manage Staff, Manage Children, Daily Health Card, Manage In-Kind, Custom Portfolio Tags, Custom Children Attributes, Manage Learning Media, Push Settings, and Merge Account. The main content area has a header with 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. A user profile for 'Jane Ilo' is visible in the top right. The main content area is titled 'Import/Sync' and includes a warning message: 'If any child has been added manually by teachers (instead of being imported), please ensure the child's first name, last name, and birthday match those on the roster files. Otherwise there will be a duplicate of the child.' Below this is the 'Import/Sync Summary Report' section, which displays a green checkmark and the text 'Import template verification completed'. A table shows the following data:

Center / Site	Before import	Newly enrolled	Transferred from other sites	Transferred to other sites	Set to inactive	After import
San Diego Center2	0	0	1	0	0	1

Below the table is a 'Back to Import/Sync home' button. A red box highlights the 'Go to Set up SFTP Server' button, with a red arrow pointing to it.

## Step 1: Import Template Verification

1. Before getting into the second step, there is a prompt that asking user if they want to keep the roster in the import in the first step
2. Click "No" to undo the import and go to step 2
3. Click "Yes" to save the data and go to step 2



The screenshot displays a web application interface with a dark teal sidebar on the left containing various menu items such as 'Admin Settings', 'Import/Sync', 'Rating Period', 'Manage Center', 'Manage Staff', 'Manage Children', 'Daily Health Card', 'Manage In-Kind', 'Custom Portfolio Tags', 'Custom Children Attributes', 'Manage Learning Media', 'Push Settings', and 'Manage Account'. The main content area is dimmed and shows a table with columns for 'Center / Site', 'Set to inactive', and 'After import'. A 'Confirmation' dialog box is overlaid in the center, featuring a light pink header and the text 'Do you want to keep the data in this test import?'. The dialog includes three buttons: 'Cancel', 'No', and 'Yes'. The user's name 'Jane Ilo' and a profile picture are visible in the top right corner of the application.

Center / Site	Set to inactive	After import
San Diego Center2	0	1



## Step2 : Set up SFTP server

There are two servers to select

- Use Learning Genie Server (usually if users don't have their own SFTP server )
- Use School District SFTP Server (usually if user have their own SFTP server )

Both options are not selected by default

The screenshot shows a web application interface for setting up an SFTP server. At the top, there is a navigation bar with a home icon, 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. On the right, there is a notification bell and a user profile for 'Jane Ilo'. A left sidebar contains 'Admin Setting' and various management options like 'Import/Sync', 'Rating Period', 'Manage Center', etc. The main content area is titled 'SFTP Sync' and features a progress bar with four steps: 1. Import Template Verification (completed), 2. Set up SFTP Server (current step), 3. File Test, and 4. Setup Completion. Below the progress bar, the text 'Please select the following' is followed by two radio button options: 'Use LearningGenie SFTP Server' (highlighted with a teal box and a red arrow) and 'Use School District SFTP Server' (in a white box with a red arrow). At the bottom, there are 'Back' and 'Next' buttons.

# Step2 : Set up SFTP server

## Learning Genie SFTP Server

1. First the SIS administrators need to enter Learning Genie SFTP Server into the SIS system
2. Agency owner/admin To receive notifications, ususally select Agency owner/admin, Site admin. And agency owner/admin will receive the notifications if with no email selected here.
3. "Inviting Parent" is checked by default, that is, invite parents to log in LG app via e-mails
4. After the roster file is uploaded in the server, user can click “ The file is ready, test now ” to go to the next step “File Test”

The screenshot shows the 'SFTP Sync' configuration page in the Learning Genie system. At the top, there is a navigation bar with 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. A user profile for 'Jane Ilo' is visible in the top right. A teal sidebar on the left contains various administrative options like 'Import/Sync', 'Rating Period', 'Manage Center', etc. The main content area features a progress bar with four steps: 'Import Template Verification' (completed), 'Set up SFTP Server' (current step), 'File Test', and 'Setup Completion'. Below the progress bar, the title 'Learning Genie SFTP Server' is followed by instructions to change the server if needed. The current server information is displayed: SFTP Server (s-a7a2138d59cb473a9.server.transfer.us-west-1.amazonaws.com), Port (22), Username (29300107BE2843E1824E4001AAD00BA0), and Password (masked with asterisks). There are 'Copy' buttons for each field and a 'Show' button for the password. A 'Select Notification Email(s)' field is present, with the 'Inviting Parent' checkbox checked. A note at the bottom states: 'Please upload the file again imported at the first time after connect to server via entering the server information. Then click "Import now" to test if it works normally.' At the bottom of the page, there are 'Previous' and 'The file is ready, test now' buttons.

Admin Setting

Home Dashboard Manage Portfolio Manage Family Engagement Lessons Jane Ilo

SFTP Sync

Import Template Verification Set up SFTP Server File Test Setup Completion

### Learning Genie SFTP Server

Below is your Learning Genie SFTP server information. You can change to School District SFTP Sever by clicking "Change Server".

Change Server

SFTP Server: s-a7a2138d59cb473a9.server.transfer.us-west-1.amazonaws.com Copy

Port: 22 Copy

Username: 29300107BE2843E1824E4001AAD00BA0 Copy

Password: \*\*\*\*\* Show Copy

Select Notification Email(s) :

Inviting Parent:  When checked,the system will automatically send e-mail to the parents in the imported file,and the parents can log in by downloading APP via e-mail.

Please upload the file again imported at the **first time** after connect to server via entering the server information. Then click "Import now" to test if it works normally.

Previous The file is ready, test now

## Step2 : Tips for Setting up the Server

You can use the naming convention such as Agency Name\_Dates.

If there are multiple files, you could start with the AgencyName\_Filename\_Dates

The screenshot displays an SFTP client interface with the following components:

- Host:** sftp://s-a7a2138d59c... **Username:** 6C23C55C539 **Password:** [masked] **Port:** [empty] **Quickconnect** [dropdown]
- Status Log:**
  - Status: Disconnected from server
  - Status: Connecting to s-a7a2138d59cb473a9.server.transfer.us-west-1.amazonaws.com...
  - Status: Using username "6C23C55C539144468485602FECBE973E".
  - Status: Connected to s-a7a2138d59cb473a9.server.transfer.us-west-1.amazonaws.com
  - Status: Retrieving directory listing...
  - Status: Directory listing of "/" successful
  - Error: FATAL ERROR: Received unexpected end-of-file from SFTP server**
- Local site:** /Users/genejshi/Desktop/
  - genejshi
    - .Trash
    - .config
    - .cups
    - .dropbox
    - .putty
    - Applications
    - Desktop
    - Documents
- Remote site:** /
  - archive
  - LalaAcademy0901...
- Local File Listing:**

Filename	Filesize	Filetype	Last modified
..			
LalaAcademy090120.csv	1,122	Comma Separat..	08/20/2020 09:...
- Remote File Listing:**

Filename	Filesize	Filetype	Last modified	Permissions	Owner/Group
..					
archive		Directory	09/02/2020 ...	drwxr--r--	--
LalaAcademy0901...	1,122	Comma S..	09/02/2020 ...	-rwxr--r--	--

## Step2 : Set up SFTP server (Alternatively Use School District SFTP server)

### School District SFTP Server

1. Fill school SFTP server information in to complete the direct SFTP sync
2. Click "Change Server" or go back to last step to change server
3. Agency owner/admin To receive notifications, ususally select Agency owner/admin, Site admin. And agency owner/admin will receive the notifications if with no email selected here.
4. "Inviting Parent" is checked by default, that is, invite parents to log in LG app via e-mails
5. After the roster file is uploaded in the server, user can click " The file is ready, test now " to go to the next step "File Test"

The screenshot shows a web application interface for setting up an SFTP server. The top navigation bar includes 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. The user is logged in as 'Jane Ilo'. The left sidebar lists various administrative functions, with 'Import/Sync' selected. The main content area is titled 'SFTP Sync' and features a progress indicator with four steps: 'Import Template Verification' (completed), 'Set up SFTP Server' (current step), 'File Test', and 'Setup Completion'. Below the progress bar, the section is titled 'School District SFTP Server' and contains the following instructions and form fields:

Please enter the credential details of School District SFTP Server at below to complete the direct synchronous upload. You can change to Learning Genie SFTP sever by clicking "Change Server".

\* SFTP Server:

\* Port:

\* Username:

\* Password:  Show

Select Notification Email(s)

Inviting Parent:  When checked, the system will automatically send e-mail to the parents in the imported file, and the parents can log in by downloading APP via e-mail.

Please upload the file again imported at the **first time** after connect to server via entering the server information. Then click "Import now" to test if it works normally.

Buttons: 'Previous' and 'The file is ready, test now'

# Step 3: File Test

This test is checking if the server works normal and the roster file format and content is no problem to sync

Home Dashboard Manage Portfolio Manage Family Engagement Lessons Jane Ilo

### SFTP Sync

Import Template Verification Set up SFTP Server **File Test** Setup Completion

**File Transfer and Validation Completed**

Test Again

Sample_ThirdParty_Template.csv	1 KB	08/25/2020 06:28:19
From Learning Genie		From .csv file
Agency Name	----->	Agency Name
Center Name	----->	Center Name
Class Name	----->	Class Name
Child First Name	----->	ChildName (First)
Child Last Name	----->	ChildName (Last)
Birthday	----->	Birthday
Gender	----->	Gender
Enrollment Date	----->	Enrollment Date

Back Next

# Step 3: File Test - Single File Test

- File Transfer and Validation Failed

Four possible reasons for failure:

1. Failed to connect to server
2. No file available
3. Column titles missing in the roster file
4. Required information or birthday and enrollment error

User can click "Test again" after modifying the errors in roster

- File Transfer and Validation Completed

The screenshot displays the 'SFTP Sync' interface. At the top, there is a navigation bar with 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. A teal sidebar on the left contains various administrative options like 'Import/Sync', 'Rating Period', 'Manage Center', etc. The main content area shows a progress bar with four steps: 'Import Template Verification', 'Set up SFTP Server', 'File Test', and 'Setup Completion'. The 'File Test' step is highlighted with a red circle and a red 'X' icon, indicating a failure. Below the progress bar, a red error message reads 'File Transfer and Validation Failed' for the file 'Learning Genie Center.csv' (127.0 KB, 08/18/2020 2:45 PM). A message box shows a document icon with an 'X' and the text: 'Child Name, Class' is missing in the roster file. A teal 'Test Again' button is positioned below the message. At the bottom, there are 'Back' and 'Next' buttons.

## Step 3: File Test - Multiple Files Test at One Time

the import test results of all files will be listed in the page. If any one file failed to be transferred and validated, user need to modify the file and click "Test Again". Until all the files are validated, can they go next step by clicking "Next".

Admin Setting

Home Dashboard Manage Portfolio Manage Family Engagement Lessons

qwe qwee

### SFTP Sync

1 Import Template Verification 2 Set up SFTP Server 3 File Test 4 Setup Completion

**File Transfer and Validation Failed**

Test Again

Import File Name	File Import Test Result
Learning Genie Center.csv 127.0 KB 08/18/2020 2:45 PM	✓
Learning Genie ...Center.csv 127.0 KB 08/18/2020 2:45 PM	✗
Learning Genie...Center.csv 127.0 KB 08/18/2020 2:45 PM	✗
Learning Genie...Center.csv 127.0 KB 08/18/2020 2:45 PM	✓

Error Count: 9

Site	Class	First Name	Last Name	Birthday	Entry Day
Miss	C-E Happy	Robert	Thomas	09/09/2017	10/09/2018
C-T_X114995	Miss	Linda	Jones	10/08	10/08/2018
C-T_X114996	C-A Happy	Miss	Miller	11/09/2017	10/09/2018
C-T_X114997	C-B Happy	Brenda	Miss	10/08/2017	10/08/2018
C-T_X114998	C-C Happy	Shirley	Jones	10/08/2017	Miss
C-T_X114999	C-L Happy	Daniel	Thomas	Miss	10/08/2018

Back Next

# Step 4: SFTP Setup Completion

when users come up to this step, it means they can import roster files to Learning Genie directly via SFTP synchronization.

Then, they will also see the reminders that "Manual Adding Roster" is turned off by default for staffs and they will receive notification emails next day after uploading file in the previously

The screenshot shows the 'SFTP Sync' completion screen in the Learning Genie interface. The top navigation bar includes 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. The user profile 'Jane Ilo' is visible in the top right. The left sidebar lists various administrative settings, with 'Import/Sync' highlighted. The main content area displays a progress bar with four steps: 'Import Template Verification', 'Set up SFTP Server', 'File Test', and 'Setup Completion', all marked as complete with green checkmarks. Below the progress bar, a green heading reads 'SFTP Syncing Setup Completion'. A message states: 'Good job! You have finished roster files SFTP syncing setup. Now you can start to upload your roster and import.' A list of three reminders follows: 'Manual Adding Roster' is turned off by default; the roster file will sync successfully next day if uploaded before 7pm; and an email report will be received after successful syncing. A 'Complete' button is located in the bottom right corner.

Admin Setting

Home Dashboard Manage Portfolio Manage Family Engagement Lessons

Jane Ilo

SFTP Sync

Import/Sync

Rating Period

Manage Center

Manage Staff

Manage Children

Daily Health Card

Manage In-Kind

Custom Portfolio Tags

Custom Children Attributes

Manage Learning Media

Push Settings

Merge Account

Transfer Account

Manage Analytical

Import Template Verification Set up SFTP Server File Test Setup Completion

✔ SFTP Syncing Setup Completion

Good job! You have finished roster files SFTP syncing setup. Now you can start to upload your roster and import.

- "Manual Adding Roster" is turned off by default for staffs to avoid mistaken operations, You can turn on it in 'Manage Staff'
- The roster file will be synced successfully next day if you upload the file before 7pm the previous day.
- You will receive an e-mail including an import report after the file is synced successfully.

Complete



# Other Useful Information

# Available to Make Changes after SFTP Sync is Set up

1. user can click “ Set-up SFTP Sync in SIS” to come to the SFTP server setup page
2. Click "Change server"to go through step2, step3 and step4
3. Change the notification email(s)
4. Change on the option to invite parents via emails

The screenshot shows the 'SFTP Sync' configuration page in a web application. The top navigation bar includes 'Home', 'Dashboard', 'Manage Portfolio', 'Manage Family Engagement', and 'Lessons'. The user's name 'Jane Ilo' is visible in the top right corner. The left sidebar contains various administrative options, with 'Import/Sync' highlighted. The main content area is titled 'SFTP Sync' and contains the following information:

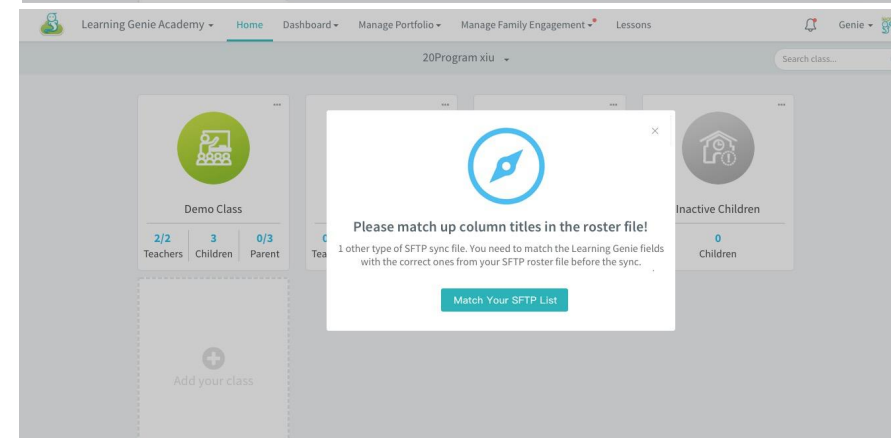
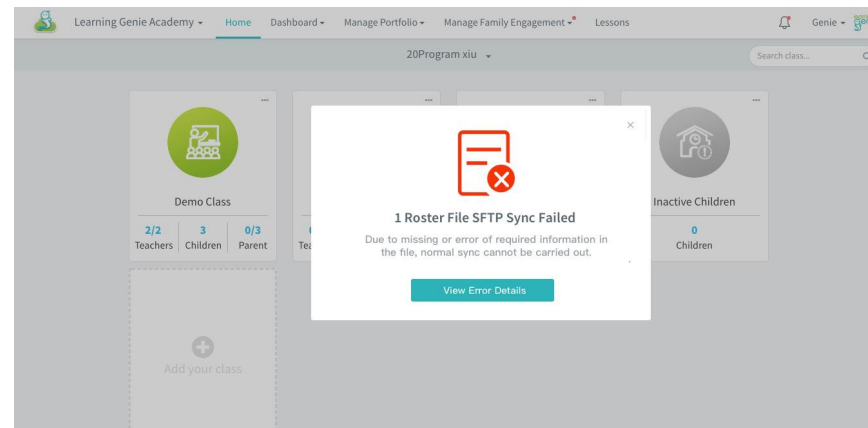
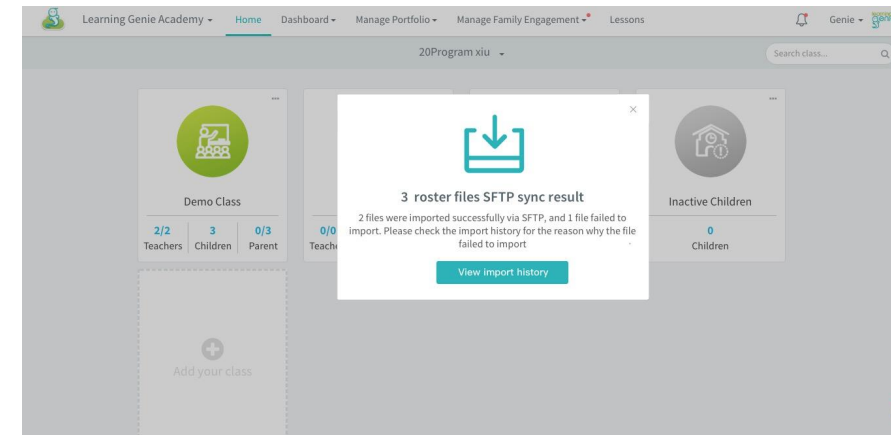
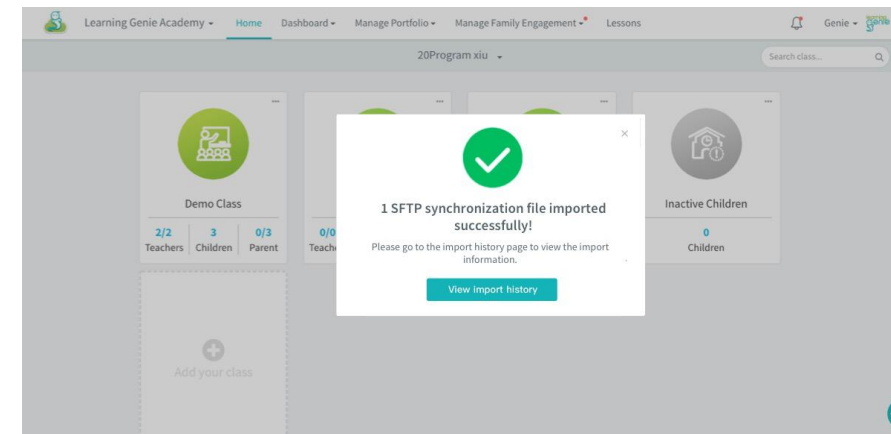
- SFTP service access information**: A notice states that the SFTP sync will conduct a nightly sync of the uploaded roster file, with email confirmation and alerts. It instructs users to enter credential details of Learning Genie SFTP into their SIS system to complete the direct synchronous upload. A 'Change Server' button is provided for this purpose.
- Upload File Type**: Set to 'Generic CSV'.
- SFTP Server**: s-a7a2138d59cb473a9.server.transfer.us-west-1.amazonaws.com (with a 'Copy' button).
- Port**: 22 (with a 'Copy' button).
- Username**: 29300107BE2843E1824E4001AAD00BA0 (with a 'Copy' button).
- Password**: \*\*\*\*\* (with 'Show' and 'Copy' buttons).
- Select Notification Email(s)**: A text input field containing 'xiuxiu@learn.com.bak'.
- Inviting Parent**: A checkbox is checked, with the text: 'When checked, the system will automatically send e-mail to the parents in the imported file, and the parents can log in by downloading APP via e-mail.'

At the bottom of the page, there are 'Back' and 'Save' buttons.

# SFTP Related Prompts in Web Portal

Prompts on possible file import results

1. The file(s) is/are imported successfully
2. Some required information missing or enrollment/birth date problems
3. If there are new classes in roster file, it reminds user to change the defaulted rating frameworks if need
4. The SFTP sync results of multiple files uploaded in previous day



## learning genie Your SFTP Sync File has Errors

**i** Your files cannot be imported into the Learning Genie system normally due to the following errors. Please modify your file according to the errors listed below and sync again.

Agency: Para Los Ninos1

### RosterSyncReview...etc.csv: Error in roster information

Please modify your roster file according to the red error messages below.

There are several situations in the roster file that cannot be imported normally, including:

- Required information is missing: school name, class name, child's last name, child's first name, birthday, or date of admission;
- Required information error: date format error or birthday after the date of admission; (If the unnecessary information has errors, it will be automatically ignored, and will not affect the normal import of files.)

Site	Class	First Name	Last Name	Birthday	Entry Day
miss	C-E Happy	Robert	Thomas	09/09/2017	10/09/2018
C-T_X114995	miss	Linda	Jones	10/08	10/08/2018
C-T_X114996	C-A Happy	miss	Miller	11/09/2017	10/09/2018
C-T_X114997	C-B Happy	Brenda	miss	10/08/2017	10/08/2018
C-T_X114998	C-C Happy	Shirley	Jones	10/08/2017	miss
C-T_X114999	C-L Happy	Daniel	Thomas	miss	10/08/2018

[Go to Settings](#)



#### Learning Genie Inc

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<https://www.learning-genie.com/>

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Email report on  
required information  
missing



## There are new classes in your sync file that need to be set up with a framework.

Agency: Para Los Ninos1

Source file : RosterSyncReview...

### The new class needs to be set up with a class framework and rating period.

There are new classes in the file you are importing. Please set up a rating framework (Optional) for these new classes.

New Class: 4 Total after update: 11

Center / Site	Add New Classes
MSHS Western	Stars Class, Loin Class
MSHS Ar buckle <b>new</b>	Happy Class, Happy Class 01
MSHS Ar buckle 1 <b>new</b>	Happy Class 01, Happy Class 02
MSHS Ar buckle 2 <b>new</b>	Happy Class 03, Happy Class 04
MSHS Ar buckle 3 <b>new</b>	Happy Class 05, Happy Class 06

[Go to Settings >](#)



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Email report on sync  
roster file with new  
classes in it

Email report on multiple files  
syncing

File 1: required information  
missing

File2: new classes in roster file



## Your SFTP Sync File has Errors

**i** Your files cannot be imported into the Learning Genie system normally due to the following errors. Please modify your file according to the errors listed below and sync again.

Agency: Para Los Ninos1

### RosterSyncReview...etc.csv: Error in roster information

Please modify your roster file according to the red error messages below.

There are several situations in the roster file that cannot be imported normally, including:

- Required information is missing: school name, class name, child's last name, child's first name, birthday, or date of admission;
- Required information error: date format error or birthday after the date of admission; (If the unnecessary information has errors, it will be automatically ignored, and will not affect the normal import of files.)

Site	Class	First Name	Last Name	Birthday	Entry Day
miss	C-E Happy	Robert	Thomas	09/09/2017	10/09/2018
C-T_X114995	miss	Linda	Jones	10/08	10/08/2018
C-T_X114996	C-A Happy	miss	Miller	11/09/2017	10/09/2018
C-T_X114997	C-B Happy	Brenda	miss	10/08/2017	10/08/2018
C-T_X114998	C-C Happy	Shirley	Jones	10/08/2017	miss
C-T_X114999	C-L Happy	Daniel	Thomas	miss	10/08/2018

### RosterSyncReview.csv: There are new classes in your sync file that need to be set up with a rating framework.

There are new classes in the file you are importing. Please set up a framework and rating period for these new classes. If the framework and rating period are not set up before nightly sync, it will import the classes with a default framework and rating period. You can change the rating framework later after file is imported.

New Class: 4 Total after update: 11

Center / Site	Add New Classes
MSHS Western	Stars Class, Loin Class
MSHS Ar buckle <b>new</b>	Happy Class, Happy Class 01

[Go to Settings](#)



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# Set new classes up with rating frameworks via email

1. Step 1: Set up rating frameworks for new classes
2. Step 2: Go on to set up rating periods for new classes
3. Step 3: At last, take a review of the settings



## Step 1: Set up rating frameworks for new classes



New sites added: 2    New classes added: 2    Source file: Learning Genie Center.csv

Learning Genie Academy	
C-T-X114891	<span>new</span> >
C-T-X114995	<span>new</span> >

Class

G536 new

Class rating framework

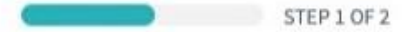
DRDP2015-PRESCHOOL

- Apply to all classes in the center
- Apply to all sites in the Agency

Next



Step 2: Go on to set up rating periods for new classes



STEP 1 OF 2

### 2020-2021 Rating Periods Setup for New Classes

Head Start

State Preschool

Head start

Select all

Little Scholars Aca... (0/2) >

New York Center (0/1) >

Previous

Preview



### Step 3: Take a review of framework and rating periods set for each class

STEP 2 OF 2

New sites added: 2    New classes added: 2    Source file: Learning Genie Center.csv

Center / Site	Class	Framework	Academic Year	First Rating Period Duration	Rating Period
C-T_X114891	G5336	DRDP 2015-PRESCHOOL	2019-2020	60 days	07/25/2019 - 09/07/2019 (Fall 2019) 09/08/2019 - 12/31/2019 (Winter 2019) 01/01/2020 - 02/01/2020 (Spring 2020)
C-T_X114995	E8629	DRDP 2015-PRESCHOOL	-	-	-

Previous

Finish

# Operations on Import/Sync Home

The prompts in red appear if the imported roster file has new classes which need to be set up with rating frameworks and rating periods

- Admin Setting
- Import/Sync** 8
- Rating Period
- Manage Center
- Manage Staff
- Manage Children
- Manage In-Kind new
- Custom Portfolio Tags
- Custom Children Attributes
- Manage Learning Media
- Push Settings
- Merge Account
- Transfer Account
- Manage Analytical Reporting Data

## Import/Sync ?

If any child has been added manually by teachers (instead of being imported), please ensure the child's first name, last name, and birthday match those on the roster files. Otherwise there will be a duplicate of the child.

Import History

There are 1 SFTP synchronization file in which the new class rating period has not yet been set. [Set Rating Period](#)

**ChildPlus.net**  
Professional Head Start Management Software


Import from  
**DRDPtech**

**PowerSchool**

**CenterTrack**  
by Controltec

Learn More About CenterTrack

**PROMIS**

 Other



# View Import History

users can check import records of files imported via SFTP sync or manual adding, including Upload Time, import finish time, sync status and so on.



Learning Genie Academy ▾

[Home](#)

[Dashboard](#) ▾

[Manage Portfolio](#) ▾

[Manage Family Engagement](#) ▾

[Lessons](#)



Genie ▾



Admin Setting

[Import/Sync](#)

[Rating Period](#)

[Manage Center](#)

[Manage Staff](#)

[Manage Children](#)

[Manage In-Kind](#)

[Custom Portfolio Tags](#)

[Custom Children Attributes](#)

[Auto Playlist](#)

[Push Settings](#)

[Merge Account](#)

[Transfer Account](#)

[Manage Analytical Reporting Data](#)

## Import History ?

At present, only one recovery is supported. If the user imports incorrect data, it can be returned to the state just before the import. Please ensure that the information you imported is correct. If the import is inaccurate, some duplicate data may appear.

Last Import Time: 10/12/2019 16:46:55

[Undo Last Import](#)

Import /Sync By	Source	Template	Upload Time	Finish Time	Roster File	Verification PDF	Sync Status		
	SIS-SFTP	DRDP Online	10/14 10:26		<a href="#">File</a>	<a href="#">PDF</a>	<span>! Error</span>	<a href="#">Detail</a>	<a href="#">Delete</a>
jje@learnin...	Learning gen web portal	DRDP Online	10/13 16:00		<a href="#">File</a>	<a href="#">PDF</a>	<span>🔄 Pending</span>		<a href="#">Delete</a>
	SIS-SFTP	DRDP Online	10/13 15:26	10/12 15:26	<a href="#">File</a>	<a href="#">PDF</a>	<span>✅ Complete</span>	<a href="#">View Import Alerts</a> <sup>8</sup>	<a href="#">Detail</a> <a href="#">Delete</a>
	SIS-SFTP	DRDP Online	10/13 15:26	10/12 15:26	<a href="#">File</a>	<a href="#">PDF</a>	<span>✅ Complete</span>	<a href="#">View Import Alerts</a> <sup>1</sup>	<a href="#">Detail</a> <a href="#">Delete</a>

[Back](#)

# See Error Details of Files that Failed to Be Imported

Click "Detail" to see the errors of roster file which are displayed with "Error" in sync status. Users can import the roster file again after modifying the file

Admin Setting

Home Dashboard Manage Portfolio Manage Family Engagement Lessons

qwe qwee

## SFTP Sync File Error Details

**Please modify your file according to the red error messages, and then synchronize again.**

1. There are several situations in the synchronization file that cannot be imported normally, including:  
Required information is missing: school name, class name, child's surname, child's first name, birthday or date of admission
2. Required information error. This can include date format error or birthday after the date of admission  
(If any unnecessary information has errors, it will be automatically ignored and will not affect the normal import of files.)



Source file : [RosterSyncReviewSheet\\_Learning...](#) Error Count: 9


Site	Class	First Name	Last Name	Birthday	Entry Day
miss	C-E Happy	Robert	Thomas	09/09/2017	10/09/2018
C-T_X114995	miss	Linda	Jones	10/08	10/08/2018
C-T_X114996	C-A Happy	miss	Miller	11/09/2017	10/09/2018
C-T_X114997	C-B Happy	Brenda	miss	10/08/2017	10/08/2018
C-T_X114998	C-C Happy	Shirley	Jones	10/08/2017	miss
C-T_X114999	C-L Happy	Daniel	Thomas	miss	10/08/2018

[Back to Import History](#) [I know, Import Again after Modification](#)

# Check Children with Unsuccessful Updates in Imported Roster File

Users can import the roster file again after modifying these children's information.








 Home Dashboard ▾ Manage Portfolio ▾ Manage Family Engagement ▾ Lessons Jane Ilo ▾ 

 **Children with unsuccessful update: 6**

The following errors can be corrected:

**IT-PS: The entry date in the import file was not updated for some children transferring from IT to PS classrooms. (Children: 1/3)**

If a child changes classes, but the entry date in the import file is not updated accordingly, the child will not be transferred. The entry date should be updated prior to the date on which the child changes classes.

Status	Center Name	Class Name	First Name	Last Name	Date of Birth	Entry Date	Current Alias	New Class Alias	Alias 1	Rating Period
 Pending submission	School A	Sunshine	Carol	Johnson	07/01/2018	 10/16/2019	Season	Season	Fall 2019	10/16/2019 -
 Submitted	School B	Smile	Linda	Garcia	01/11/2018	10/16/2019	Season	Season	Fall 2019	10/16/2019 -
 Not modified	School C	Ocean	Shirley	Garcia	01/11/2018	 09/05/2019	 Time ▾	Season		
 Ignored	School D	Apple	Linda	Garcia	01/11/2018	10/16/2019	Season	Season	Fall 2019	10/16/2019 -

**IT-PS: Child is 100% rated in the current rating period but has not been locked. (Children: 1/3)**

Do not modify for now [Ignore these issues](#) Click Submit to save all modified child information. Submit <sup>1</sup>