SIS Integration Definition (Text File method)

Contact Information:

Kari Fraser
VP, Software Solutions,
Leadership Services Inc. (clevr)
kfraser@clevr.ca
Office (613) 966-6806

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# 1. Introduction

The scope of the integration project involves regularly scheduled routines to pull Student Information System (SIS) data into clevr via text files.  Custom text files will be utilized for the SIS/clevr data integration as a direct Web Service / API connection is not available.  The data being pulled into clevr either via the regularly scheduled routines or the on-demand integration routines will be as up to date as the text files the integration routines are pulling the data from.   This process does not include data from external systems outside of the SIS, nor does it include data that is not outlined in the file definitions within this document.
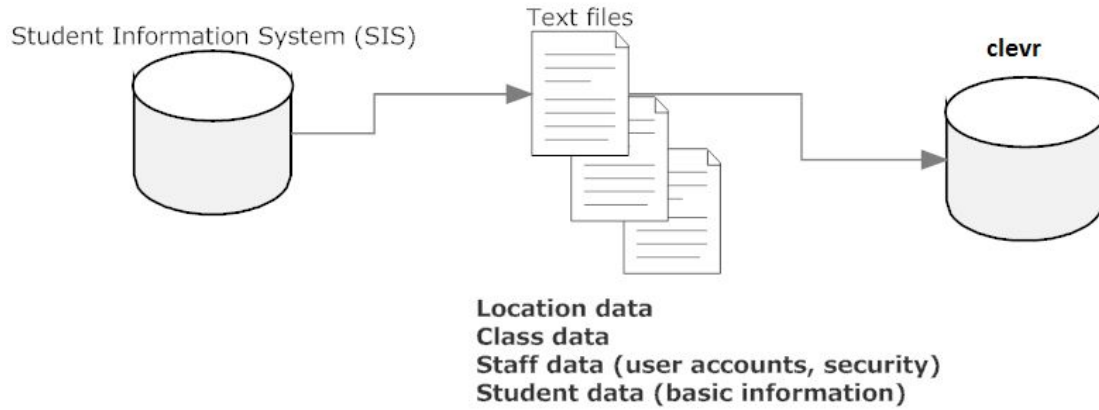
# 2. Scheduled Integration

## 2.a      Purpose

The purpose of the scheduled integration routines is to regularly update the clevr database with location, staff and student records required for basic functionality within clevr.

## 2.b      Overview

The scheduled integration routines will read data from the custom views or text files and create/update location, staff and students records in the clevr database.  The data pulled for staff during the scheduled routines will be used to create user accounts and assign appropriate permissions to templates and records within clevr.  The data pulled for students will include basic information such as name and student number for all students who have an active student record in the SIS.  This will allow users to create clevr records for any student within the Board without needing to manually record the student name, birthdate, student number, etc.)

Location data
Class data
Staff data (user accounts, security)
Student data (basic information)

## 2.c     File/mapping definitions

### Locations

Purpose:  Insert / update locations
Update frequency:  Initial setup & as required
Filename: <localId>clevrLocations.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| proprietaryId | varchar(100) | unique id used in source system | required |
| localId | varchar(50) | Text id to be displayed on reports (i.e. mident) | required |
| name | varchar(50) | location name | required |
| type | int | location type | optional<br><br>elementary = 1<br>secondary   = 2 |
| streetAddress | varchar(250) | | optional |
| city | varchar(100) | | optional |
| region | varchar(75) | | optional |
| country | varchar(75) | | optional |
| postal | varchar(10) | | optional |
| phone | varchar(30) | | optional |

**Students/Staff**

Purpose:  Insert / update student and staff records
Update frequency:  TBD (daily, weekly, etc)
Filename: <localId>clevrStaff.txt  AND <localId>clevrStudents.txt (2 separate files)

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| proprietaryId | varchar(100) | unique id used in source system | required<br>can not be 0s |
| localId | varchar(50) | Text id to be displayed on reports (i.e. OEN/MEN/ASN) | required<br><br>(if OEN/MEN/ASN is not present, place proprietaryId value here as well) |
| primaryLocation | varchar(100) | proprietaryId (unique Id from the SIS)  from locations table for primary location | required |
| lastName | varchar(150) | legal last name | required |
| firstName | varchar(150) | legal first name | required |
| middleName | varchar(150) | | optional |
| commonName | varchar(150) | commonly used first name | optional |
| birthdate | datetime | | recommended |
| status | int | 1 = active<br>0 = inactive | required |
| email | varchar(250) | | optional |
| gender | char(1) | M/F | required |
| role | varchar(100) | primary person role (student, elementary teacher, secondary teacher, elementary principal, secondary principal, etc) | required |
| username | varchar(32) | clevr username | optional |
| password | varchar(32) | clevr password | optional<br><br>Can be encrypted using MD5 encryption, if desired |
| grade | varchar(10) | Student grade level (student file only) | optional |

**NOTE: ALL FILES BELOW ARE REQUIRED TO SUPPORT CLASS-LEVEL SECURITY (IE: TEACHERS CAN ONLY SEE STUDENTS IN THEIR OWN CLASS). THEY ARE NOT REQUIRED IF YOUR DIVISION DOES NOT REQUIRE CLASS LEVEL SECURITY OR OTHER TEMPLATE FUNCTIONALITY DEPENDENT ON CLASS INFORMATION.**

## Classes

Purpose: Insert / update class records
Update frequency: TBD (weekly, etc)
Filename: <localId>clevrClasses.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| locationId | varchar(100) | proprietaryId in locations extract | required |
| proprietaryId | varchar(100) | unique id used in source system | required |
| localId | varchar(50) | Text id to be displayed on reports (i.e. class code) | required |
| courseCode | varchar(50) | | required |
| courseName | varchar(150) | | required |
| courseDescription | varchar(150) | | optional |
| classSize | varchar(50) | | optional |
| classMaxSeats | varchar(50) | | optional |

## Staff Class

Purpose: Insert / update staff class records
Update frequency: TBD (weekly, etc)
Filename: <localId>clevrStaffClasses.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| locationId | varchar(100) | proprietaryId in locations extract | required |
| classId | varchar(100) | proprietaryId in classes extract | required |

| | | | |
|---|---|---|---|
| staffId | varchar(50) | proprietaryId in staff extract | required |
| firstName | varchar(150) | used to look up matching records | required |
| lastName | varchar(150) | used to look up matching records | required |
| birthdate | datetime | used to look up matching records | yyyy-mm-dd |
| proprietaryId | varchar(100) | used to look up matching records | required |

**Student Class**

Purpose: Insert / update student class records
Update frequency: TBD ( weekly, etc)
Filename: <localId>clevrStudentClasses.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| locationId | varchar(100) | proprietaryId in locations extract | required |
| classId | varchar(100) | proprietaryId in classes extract | required |
| studentId | varchar(50) | proprietaryId in student extract | required |
| firstName | varchar(150) | used to look up matching records | required |
| lastName | varchar(150) | used to look up matching records | required |
| birthdate | datetime | used to look up matching records | yyyy-mm-dd |
| proprietaryId | varchar(100) | used to look up matching records | required |

# 3. On-demand Integration

**3.a     Purpose**

The purpose of the on-demand integration routines is to update clevr records with SIS data when a clevr record is created, or when a user clicks on the "update SIS data" menu option.

**3.b     Overview**

The on-demand integration method will pull data for all active students from text files into an SQL Server database designed to be used as staging database.  As data is required within a clevr record for a specific student, the on-demand integration routine will pull data from the staging database via a direct SQL connection and populate the clevr record with the available information.  This on-demand integration process will minimize unnecessary data in the clevr database, while providing up-to-date data to end users as required.

**3.c     File/mapping definitions (Import data feature within clevr)**

**Student Demographic Information**

Purpose:  Insert / update student demographic information
Update frequency:  TBD (daily, weekly, etc)
Filename: <localId>clevrStudentDemographics.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| proprietaryId | varchar(100) | unique id used in source system | required can not be 0s |
| localId | varchar(50) | Text id to be displayed on reports (i.e. OEN/MEN/ASN) | required<br><br>(if OEN/MEN/ASN is not present, place proprietaryId value here as well) |
| lastName | varchar(150) | legal last name | required |
| firstName | varchar(150) | legal first name | required |
| birthdate | datetime | Student birthdate | recommended |

| | | | |
|---|---|---|---|
| schoolName | varchar(50) | Name of primary location that will be imported into clevr forms | optional |
| previousSchool | varchar(50) | Name of previous school | optional |
| schoolProgram | varchar(4000) | English/French/ Spanish / Mandarin / etc. | optional |
| homeLanguage | varchar(4000) | Language spoken at home | optional |
| countryOrigin | varchar(4000) | Country of origin | optional |
| studentGradeLevel | varchar(4000) | Current student grade level | optional |
| homeroomTeacher | varchar(4000) | Homeroom teacher | optional |
| studentPhone | varchar(4000) | Student home phone number | optional |
| studentCell | varchar(4000) | Student cell phone number | optional |
| currentCredits | varchar(4000) | Number of credits accumulated to date | optional |
| studentStreetAddress | varchar(4000) | Street address component of student's home address | optional |
| studentPOBox | varchar(100) | POBox component of student's home address | optional |
| studentCity | varchar(4000) | City component of student's home address | optional |
| studentPostalCode | varchar(100) | Postal Code component of student's home address. | optional |
| studentMailingAddress | varchar(4000) | Complete mailing address for student | optional |
| parent1Name | varchar(4000) | First + last name | optional |
| parent1Email | varchar(4000) | Full email address | optional |
| parent1Phone | varchar(4000) | | optional |
| parent1Cell | varchar(4000) | | optional |
| parent1Workphone | varchar(4000) | | optional |
| parent1StreetAddress | varchar(4000) | Street address component of home address | optional |
| parent1POBox | varchar(100) | POBox component of home address | optional |
| parent1City | varchar(4000) | City component of home address | optional |
| parent1PostalCode | varchar(100) | Postal Code component of home address | optional |

| | | | |
|---|---|---|---|
| parent1MailingAddress | varchar(4000) | Complete mailing address for parent1 (if different from home address) | optional |
| parent1Agency | varchar(4000) | Agency if parent 1 is a legal guardian | optional |
| parent2Name | varchar(4000) | First + last name | optional |
| parent2Email | varchar(4000) | Full email address | optional |
| parent2Phone | varchar(4000) | | optional |
| parent2Cell | varchar(4000) | | optional |
| parent2Workphone | varchar(4000) | | optional |
| parent2StreetAddress | varchar(4000) | Street address component of home address | optional |
| parent2POBox | varchar(100) | POBox component of home address | optional |
| parent2City | varchar(4000) | City component of home address | optional |
| parent2PostalCode | varchar(100) | Postal Code component of home address | optional |
| parent2MailingAddress | varchar(4000) | Complete mailing address for parent 2 (if different from home address) | optional |
| parent2Agency | varchar(4000) | Agency if parent 2 is a legal guardian | optional |
| parent3Name | varchar(4000) | First + last name | optional |
| parent3Email | varchar(4000) | Full email address | optional |
| parent3Phone | varchar(4000) | | optional |
| parent3Cell | varchar(4000) | | optional |
| parent3Workphone | varchar(4000) | | optional |
| parent3StreetAddress | varchar(4000) | Street address component of home address | optional |
| parent3POBox | varchar(100) | POBox component of home address | optional |
| parent3City | varchar(4000) | City component of home address | optional |
| parent3PostalCode | varchar(100) | Postal Code component of home address | optional |
| parent3MailingAddress | varchar(4000) | Complete mailing address for parent 3 (if different from home address) | optional |
| parent3Agency | varchar(4000) | Agency if parent 3 is a legal guardian | optional |

| attendanceTotAbsences | varchar(4000) | Total number absences to date (current school year) | optional |
|---|---|---|---|
| attendanceTotLates | varchar(4000) | Total number times late to date (current school year) | optional |
| fundingLevel | varchar(4000) | Funding level | optional |
| fundingCategory | varchar(4000) | Funding category | optional |
| fundingRenewalDate | varchar(4000) | Funding renewal date | optional |
| medical | varchar(4000) | U.R.I.S, other, etc | optional |
| aboriginalAcademicAchievementGrant | varchar(4000) | Metis, Inuit, etc | optional |

## Staff Demographic Information

Purpose:  Insert / update student demographic information
Update frequency:  TBD (daily, weekly, etc)
Filename: <localId>clevrStaffDemographics.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| proprietaryId | varchar(100) | unique id used in source system | required<br>can not be 0s |
| localId | varchar(50) | Text id to be displayed on reports (i.e. OEN/MEN/ASN) | required<br><br>(if OEN/MEN/ASN is not present, place proprietaryId value here as well) |
| lastName | varchar(150) | legal last name | required |
| firstName | varchar(150) | legal first name | required |
| birthdate | datetime |  | recommended |
| staffStreetAddress | varchar(4000) | Street address component of home address | optional |
| staffPOBox | varchar(100) | POBox component of home address | optional |
| staffCity | varchar(4000) | City component of home address | optional |
| staffPostalCode | varchar(100) | Postal Code component of home address | optional |
| staffMailingAddress | varchar(4000) | Complete mailing address for staff | optional |

| | | member (if different from home address) | |
|---|---|---|---|
| schoolName | varchar(4000) | Name of primary location that will be imported into clevr forms | optional |
| teacherEmail | varchar(4000) | | optional |
| grade | varchar(4000) | | optional |
| serviceProvided | varchar(4000) | social/ot/slp/psych | optional |
| organization | varchar(4000) | | optional |
| organizationPhone | varchar(4000) | | optional |
| organizationFax | varchar(4000) | | optional |

**School Demographic Information**

Purpose:  Insert / update student demographic information
Update frequency:  TBD (daily, weekly, etc)
Filename: <localId>clevrLocationDemographics.txt

| Field Name | Data Type | Description | Data rules |
|---|---|---|---|
| tenantId | int | Leadership Services Client Id | required |
| proprietaryId | varchar(50) | unique id used in source system | required can not be 0s |
| localId | varchar(50) | Text id to be displayed on reports (i.e. OEN/MEN/ASN) | required  (if OEN/MEN/ASN is not present, place proprietaryId value here as well) |
| schoolName | varchar(50) | Name of primary location | optional |
| schoolStreetAddress | varchar(4000) | Street address component home address | optional |
| schoolPOBox | varchar(100) | POBox component of address | optional |
| schoolCity | varchar(4000) | City component of address | optional |
| schoolPostalCode | varchar(100) | Postal Code component of address | optional |
| schoolMailingAddress | varchar(4000) | Complete mailing address for school (if different from home address) | optional |

| | | | |
|---|---|---|---|
| schoolPhone | varchar(30) | | optional |
| schoolType | varchar(4000) | elementary/secondary/ specialized | optional |
| schoolfax | varchar(4000) | | optional |
| principal | varchar(4000) | | optional |
| vicePrincipal | varchar(4000) | | optional |
| schoolAdmin1 | varchar(4000) | | optional |
| schoolAdmin2 | varchar(4000) | | optional |
| areaPrincipal | varchar(4000) | | optional |
| areaDirector | varchar(4000) | | optional |
| superintendent | varchar(4000) | | optional |

| Change Date | Changed by | Purpose of change |
|---|---|---|
| 2016-12-01 | Graeme Young | - denote all fields not flagged as required as being optional. |
| 2016-12-01 | Graeme Young | - break down all address fields into street, POBox, city, and postal code fields.<br>- parent1Address, parent2Address, parent3Address becomes parent1MailingAddress, parent2MailingAddress, parent3MailingAddress.<br>- added address fields to StaffDemographics.<br>- added staffMailingAddress field to StaffDemographics.<br>- added schoolMailingAddress field to LocationDemographics. |
| 2016-12-01 | Graeme Young | - altered datatype of all schoolName fields from VARCHAR(4000) to VARCHAR(50).<br>- altered StudentDemographics.previousSchoolName to VARCHAR(50).<br>- altered LocationDemographics.proprietaryId to VARCHAR(50).<br>- altered LocationDemographics.schoolPhone to VARCHAR(30). |