



Purpose

The purpose of this document is to describe how the Secure File Transfer Protocol (SFTP) roster sync process works for Revision Assistant (RA). The goal is for you to be able to easily configure your Student Information System to do the following on a regular basis:

- Export a CSV file of students and/or teachers who are eligible to use Revision Assistant
- Connect to an SFTP server
- Put each file into a particular directory

We'll check for new files on a regular basis. For each file you send us, we'll sync the accounts to Revision Assistant.

Information You'll Get From Us

When we set up your SFTP account, you'll get the following:

- A **hostname** – the name of the SFTP server (`sftp.revisionassistant.com`)
- A **login name** – a unique identifier for your account
- A **password** – a password so you can login to the SFTP server

Please note: We'll also ask that you upload your files into a directory named `transfer/` so it's easy to distinguish old files from new ones.

Information We Need From You

We'll go into more details below, but overall here's the information we need from you:

- Are you going to sync students and teachers in separate files, or just students?
- What will the name of each file be? For example, `students.csv` for students, `teachers.csv` for teachers – they can be anything you want.
- How will you label the necessary fields?
- Some configuration options to tell us how to respond to certain conditions.

Getting Started

For security reasons, you must **download an SFTP Client** before using SFTP Roster Sync, rather than uploading files directly from your web browser.

Some popular free SFTP Clients include:

- FileZilla: <https://filezilla-project.org/> (Mac and Windows)
- WinSCP: <https://winscp.net/eng/index.php> (Windows)

Once you have a client installed you can use the `Username`, `Password` and `sftp:// address` provided by your CSC.

File Formats

The SFTP sync uses CSV files. We currently support two file configurations – one for students, and one for teachers. They must be separate files.

Student File

1. File must have a header row with field names.
2. Each row with a student must have the following fields – you can name them what you like, and they can be in any order, but **the info below is required**:
 - **Building**: Name of school where this student should be registered; this **must** be the same as the name of the school in Revision Assistant.
 - **First Name**: First name of student
 - **Last Name**: Last name of student
 - **Password**: Password we will assign to this student. If the student already exists in the system we **will not** change the existing password.
 - Some **Identifier**, either an **Email** or **Username**. The student will use this to login. You'll need to let us know which one you're using – sometimes we'll ask you to append an email-like identifier to your student accounts. For example, if the student normally logs in with `211582` we might ask you to send us `211582@MyDistrict` so your students don't collide with other students using that same number. At times Districts will have identifiers that **look like** emails but aren't actually valid for Revision Assistant to send emails to due to privacy or security policies – you'll need to let us know if that's the case for your students.

Teacher File

1. File must have a header row with field names.
2. Each row with a teacher must have the following fields – you can name them what you like, and they can be in any order, but **the info below is required**:
 - **Building**: Name of school where this teacher should be registered; this **must** be the same as the name of the school in Revision Assistant.
 - **First Name**: First name of teacher
 - **Last Name**: Last name of teacher
 - **Email**: Email the teacher will use to login; unlike students, teachers **must** have emails.
 - **Password**: Password we will assign to the teacher. If the teacher already exists in the system we **will not** change the existing password.

Notes

- The fields in either file **do not** have to be named as above, and the order does not matter. They're also **case-insensitive**, so 'email' and 'EMAIL' will be treated the same. When you have a sample of your export with the names of the fields just let us know and we'll update the configuration for your integration to map our internal fields to the names you're using in the header row of your file. Also, the names of the fields for students and teachers can be different.
- You do not have to upload teacher and student files at the same time, or at the same frequency. That is, you could upload student files every night but teachers once a week.
- Use a UTF-8 character encoding, if possible.

File Contents

- All students and teachers in the file will be either added to the system (if they do not currently exist) or remain unchanged (if they do currently exist).
- We **do not yet** have functionality to deregister students and teachers who are not in the file. It's in the roadmap so we can support standards like [OneRoster](#), but we're doing simple things to start.

Additional Configuration

We'll probably add more options in the future, but these are the ones we're starting with:

- When there are schools in the file that are unrecognized by RA, should we:
 - Skip those records? (DEFAULT)

- Not process the batch and notify you?
- When a student has multiple records in the same file for different schools, should we:
 - Register this student in all? (DEFAULT)
 - Not change any data for this student?
 - Not change any data for this student and notify you?
 - Not process the batch and notify you?
- If a student is currently registered to a different school than the one in the file, should we:
 - Add a registration to the new school and keep the old? (DEFAULT)
 - Add a registration to the new school and end the old?
 - Not change any data?
 - Not change any data and notify you?
- Will students need to change their password when they first login?
 - Yes, the student should change his/her password. (DEFAULT)
 - No, the student should continue using the password as assigned in the file.
- When a teacher has multiple records in the same file for multiple schools, should we:
 - Register them in all? (DEFAULT)
 - Not change any data for this teacher?
 - Not change any data for this teacher and notify you?
 - Not process the batch and notify you?
- Will teachers need to change their password when they first login?
 - Yes, the teacher should change his/her password. (DEFAULT)
 - No, the teacher should continue using the password as assigned in the file.

Frequently Asked Questions

Q: My uploads from Filezilla keep failing!

A: Be sure to check that:

- You're uploading to the '/transfer' directory
- You don't also have the file you're transferring open in another program. If you still have the CSV open in Excel, for example, Filezilla will issue an error saying that it can't read the local file.