

# Kurzweil Education SFTP and Auto Rostering Information

## 1. Introduction

The Auto Rostering process allows for your Kurzweil 3000 users to be updated securely and seamlessly as often as once per day, dependent on how often you upload your CSV file. This process makes use of an SFTP server for the secure transfer of user information, and a specifically formatted CSV file containing your current users.

## 2. SFTP Setup

The use of our SFTP server allows for the secure transfer of user information. If you're unsure how to connect to an SFTP server, it's recommended that you first contact your IT Department for assistance.

### Kurzweil SFTP Server Information

**Host Name:** sftp://sftp.kurzweiledu.com

**Port:** 22224

**User Credentials:** The username and password for the SFTP server are unique for each Kurzweil customer account and are provided once we have your technical contact information. If you have not received, or lost your user credentials, please send a request for SFTP credentials to our Kurzweil Rostering Team ([Kurzweil3000Roster@kurzweiledu.com](mailto:Kurzweil3000Roster@kurzweiledu.com)).

Though we strongly recommend against it, if you're unable to configure a connection through SFTP, we also allow for your CSV file to be submitted via email once per semester for processing.

## 3. Upload Information

The file upload needs to be in the comma separated values (CSV) format. CSV files should contain field values separated by commas, with line breaks between rows. Unless a field value contains a comma, double quotations around field values are optional.

- Your upload should contain a single CSV file, with the following filename (the filename is case sensitive):

`roster.csv`

- CSV should be placed within the SFTP Home directory of the account.
- CSV can contain both students and teachers, or only students. It cannot contain only teachers.
- CSV should contain all active user data. Do not include users that should no longer be allowed access through your site, and do not use a partial roster.
- CSV must be encoded in UTF-8, 7-bit ASCII or ISO-8859-1 (Windows-Latin1). UTF-8-BOM is not supported.
- CSV needs to be formatted according to the 'roster.csv Formatting' section below.

## 4. roster.csv Formatting

1. A header row is required, and the header names must match the information in the table below (they are case sensitive).
2. All fields marked 'Required' within the table below require a value. If a row does not contain a value for a required field, the row will not be processed, and in some instances, the entire upload will fail to process. This is especially true of the 'externalid' field.
3. The column/header order does not matter.
4. An example template for this file can be found here:  
<http://support.cambiumtech.com/index.php?pg=file&from=2&id=297>

### Header Information for roster.csv

Column Header	Required?	Description	Allowed Characters
firstname	Yes	The first name(s). At least 1 character.	space a-z A-Z 0-9 ( ).#'-
lastname	Yes	The last name(s). At least 1 character.	space a-z A-Z 0-9 ( ).#'-
externalid	Yes	User's unique ID. Must be unique within the school system, between both students and teachers. Recommend Student ID and Staff ID.	a-z A-Z 0-9
schoolname	Yes		space a-z A-Z 0-9 ( ).#&/'-
student	Yes	A flag to indicate the user is a student or a teacher. If 'Y', 'YES', 'T', or 'TRUE' is present, the user is a student. Opposite values are needed for teachers.	
email	Yes	If you do not have a valid email address for the user, a placeholder email address should be used.	
password	No	If this is present, the value will be used for newly created users. It will not change the password for users that are already created. At least 5 characters.	a-z A-Z 0-9 .-

## 5. Post Upload

If this is the first time you've uploaded a 'roster.csv' to our SFTP server, please email our Kurzweil 3000 Rostering Team ([Kurzweil3000Roster@kurzweiledu.com](mailto:Kurzweil3000Roster@kurzweiledu.com)) letting us know that you've uploaded a new file. This will allow us to test your roster upload and provide you with the results of the test for your confirmation. This gives us the opportunity to address any potential issues to ensure there is no inadvertent data loss. Once you have confirmed the test results, the Auto Rostering service will go live for your site.

If the Auto Rostering service is live for your site, any 'roster.csv' that you upload to your SFTP Home directory will be processed the same night at approximately 11 PM CST.