How to Chat

- GoToMeeting Toolbar
- Type
- Choose who to send chat to (default is Everyone)

TODAY'S TOPICS
Year End Rollover & Permissions

- Year End/Start Administrative tasks
- Permissions and Person Role Management
- Data Loading, Reports/Notification Letters & Annual Reminders
- Student Groups & Dashboards
- Q & A

Rollover: Getting Started & Resources

Get logged in: https://**yourdistrictsname**.schooldata.net/admin

- Your district's admin site (use format above)
  - must use username to login, this may or may not be your email address
- Once logged in, begin with the "Year End Rollover" folder icon — we will start on the next set of slides

- [SDS Rollover Documentation](#) (All Apps)
- [SDS Homeroom Rollover Documentation](#)
  - Some Help Center articles require you to be logged into the Help Center to view them. Quickly log into Help Center from any application clicking the '**?**', or **Help**, and clicking **Visit** or **Go to Help Center**

Are you switching to a new SIS this SUMMER? - **If YES, please put your district and date switching in the chat**.

If you are a Skyward district and will be switching to Qmlativ, or any district switching to another Student Information System (SIS), **we need to know as soon as possible and when.** If this is the case, we **may** want you to hold off on any rollover tasks.
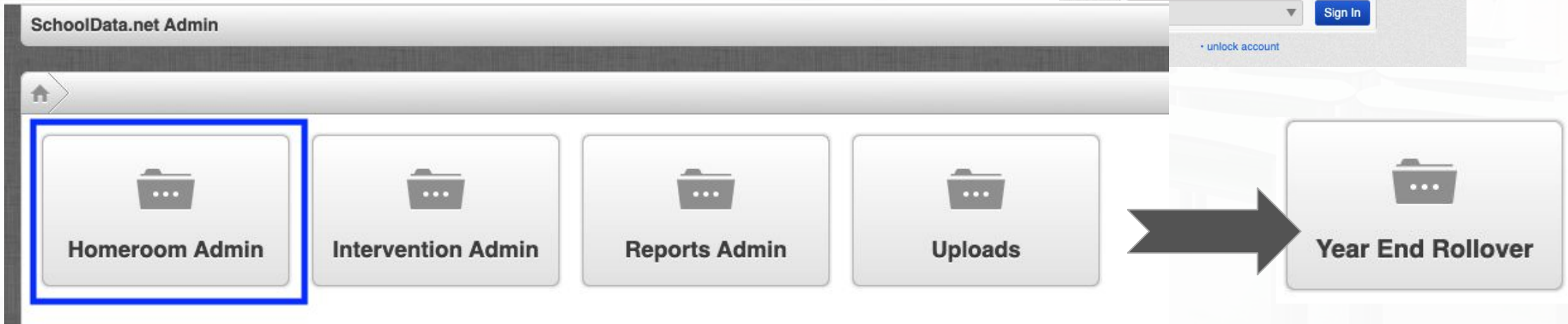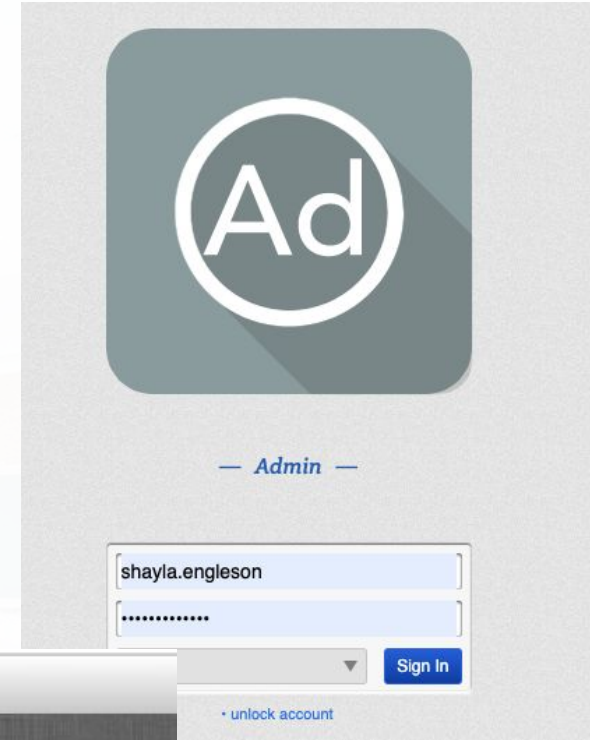
Year End/Year Start Administrative Tasks

Homeroom Admin

https://yourdistrictsname.schooldata.net/admin

1. Log into the admin site
2. Begin with the "Homeroom Admin" file icon
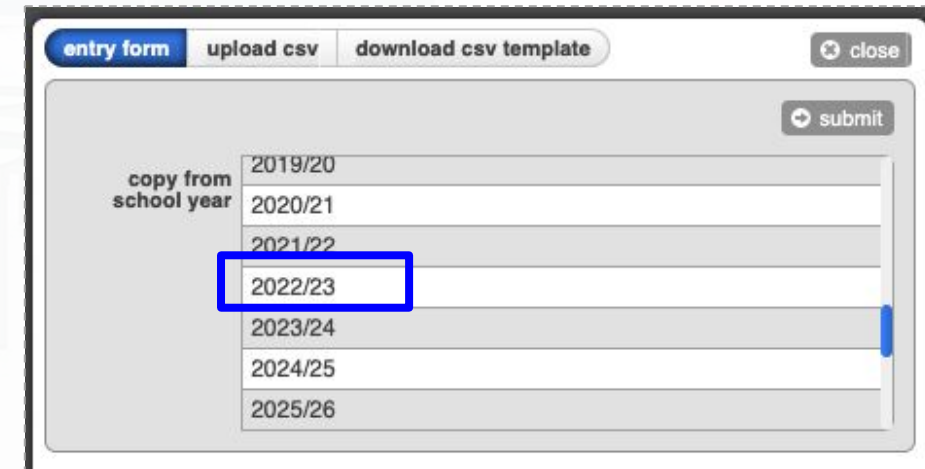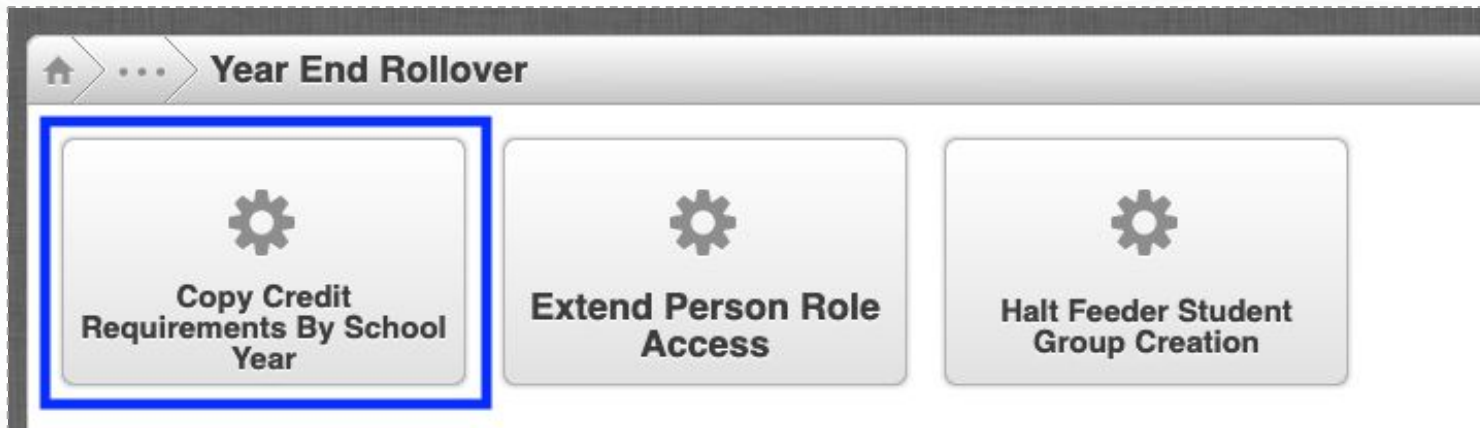3. Next, select the "Year End Rollover" file icon

Homeroom Admin

Copy Credit Requirements

1. Select the previous school year (the year you are rolling up **from**)
2. Click **Submit**
3. To View/Edit the Credit Requirements for each School Year here:
   a. Homeroom Admin >> Resources >> Credit Requirements By School Year

Homeroom Admin

Extend Person Role Access

If you would like to <u>start from scratch with permissions</u>, skip this step and then continue on slide #11.
If you have <u>done this step already</u> and made edits to permissions, skip this step and then continue on slide #11.

1. Select the previous school year (the year you are rolling up **from**)
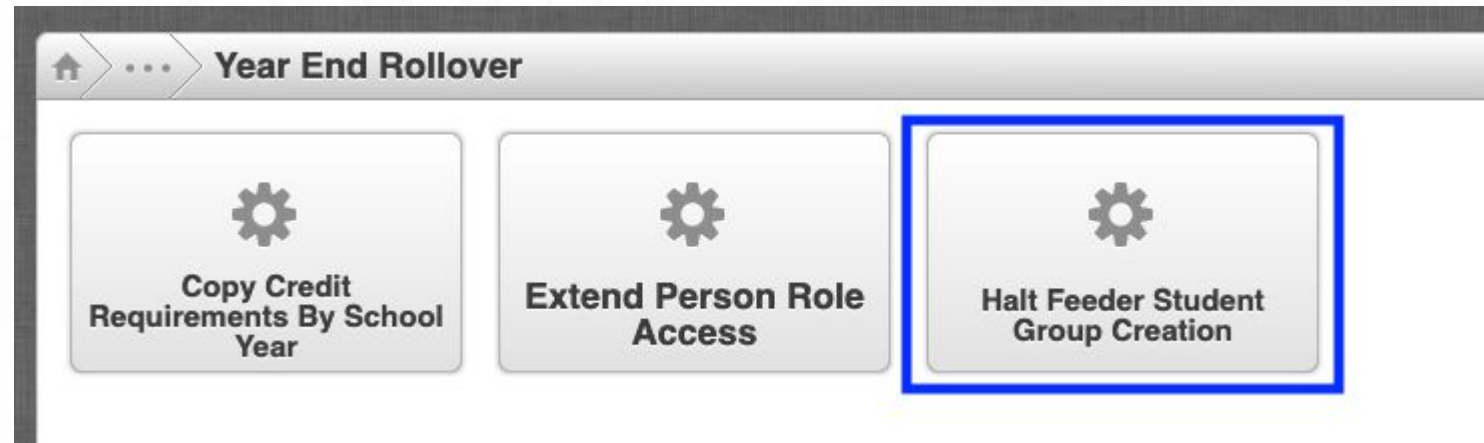2. Click Submit
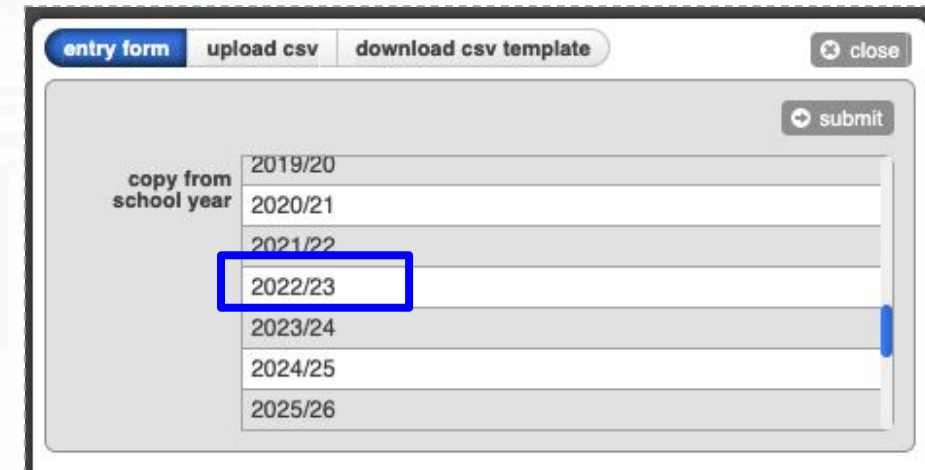
Homeroom Admin

Halt Feeder Student Group Creation

1. Click Submit

If you want more information on that this was doing for you district, or could do if you haven't used it, check out the Help Center article [Initiate Feeder Student Groups](#).
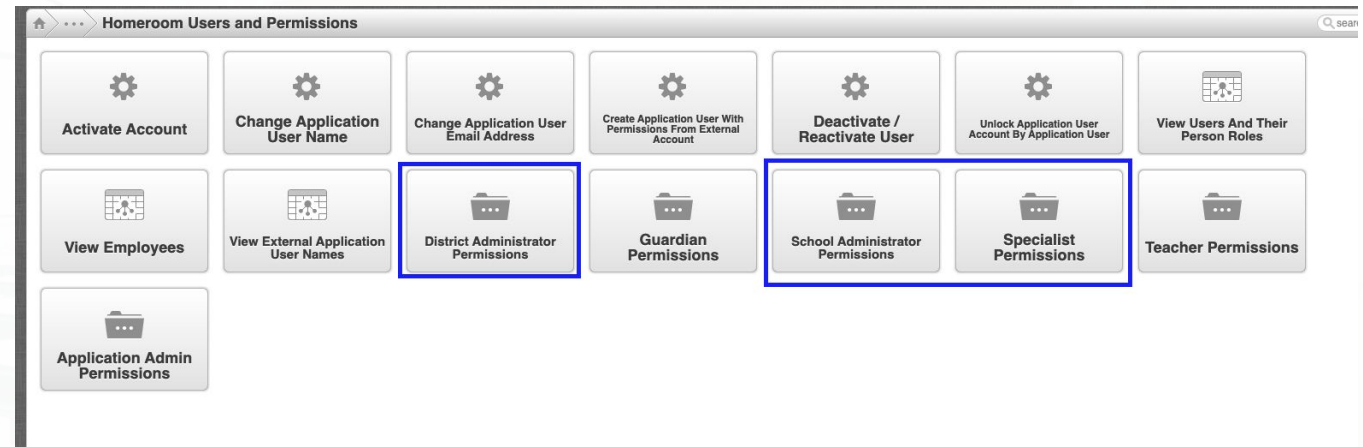
Permissions and Role Management

AD

Permissions & Management

Adding Person Roles to Users

- Types of person roles:
    - **Specialist** - school level access
    - **School Administrator** - school level access
    - **District Administrator** - district level access
    - **Teacher** - comes from your SIS data
- Who will need a role assigned:
    - Users without a class roster assigned to them via your SIS
    - Typical Examples:
        - **Specialist**: Sped teacher or counseling team member
        - **School Admin**: principal & vice principal
        - **District Admin**: directors, department admin assistants

Permissions & Management

Assigning a Specialist or School Administrator role

1. Click on the desired Person Role tile
2. Select the tile, "*Assign Specialist to School*" OR "*Assign School Admin to School*"
3. Search for AND select the Employees Name (it will highlight blue when selected)
4. Search for AND Select the School (it will highlight blue when selected)
5. Enter a Title for the user
6. Click the 'Submit' button
7. Option to add via CSV if many users need the role assigned.

EmployeeId(Required)	SchoolId(Required)	SchoolAdministratorSchoolYearTitle(Required)

'How To' Find Employee Id or School Id for csv File Uploads

Login to the Data Admin site: [District].schooldata.net/admin

Find the School Id:

Homeroom Admin >> Resources >> *'Schools'* >> the School Id is in the column: 'Id'

Find the Employee Id:

Homeroom Admin >> Homeroom Users and Permissions >> '*View External Application User Names*'

- If the record is an Employee, the last column will show their 'Employee Id'

OR

Homeroom Admin >> Homeroom Users and Permissions >> *'View Employees*'
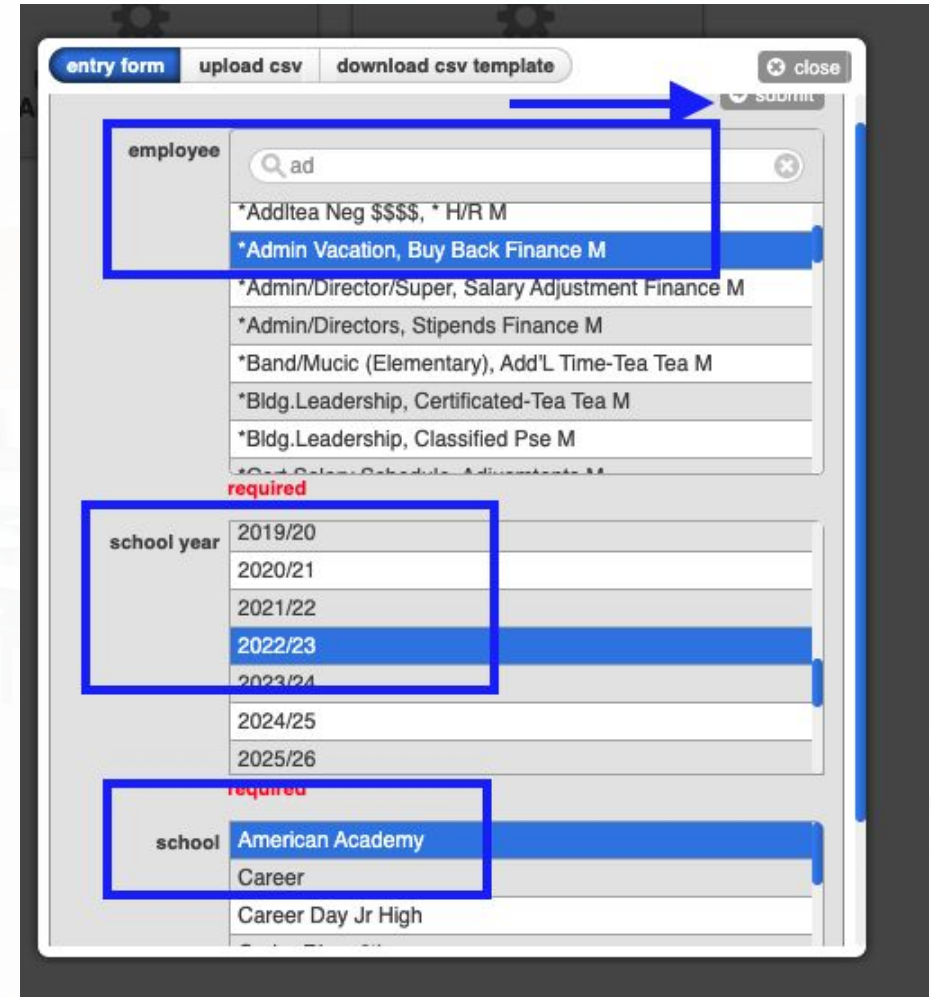
- First Column is the 'Employee Id'

To download a table as a csv: Table Actions >> Download csv

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Permissions & Management

Removing School Admin or Specialist roles

- Go to 'Remove School Admin From Current Year' or 'Remove Specialist From Current Year'(used to completely remove user from the role) or
- 'Unassign School Administrator From School' or 'Unassign Specialist From School' (used to remove user from only a specific school)
- Search and select Employee
- Click Submit if removing from the current year.
- For those removing an administrator or specialist from School:
  - select employee
  - select school year
  - select school
  - click submit
    - Same process is used while managing permissions throughout the school year.

*** Consider removing anyone who has left the district since the end of the 22/23 school year.

SchoolData.net

Permissions & Management

Assigning a District Administrator role

1. Click on the 'District Administrator Permissions' tile
2. Select: 'Create District Admin"
3. Search for AND select the Employees Name (it will highlight blue when selected)
4. Enter a Title for the user
5. Click the 'Submit' button
6. Option to add via CSV if many changes are needed.

   (Refer to slide #12 to find the Employee ID)

EmployeeId(Required)	DistrictAdministratorSchoolYearTitle(Required)

509.688.9536 | support@schooldata.net

Permissions & Management

Removing District Administrator person role

- Go to "Remove District Admin From Current Year"
- Search and select employee
- Click Submit
  - Same process is used while managing permissions throughout the school year.

*** Consider removing anyone who has left the district since the end of the 22/23 school year.
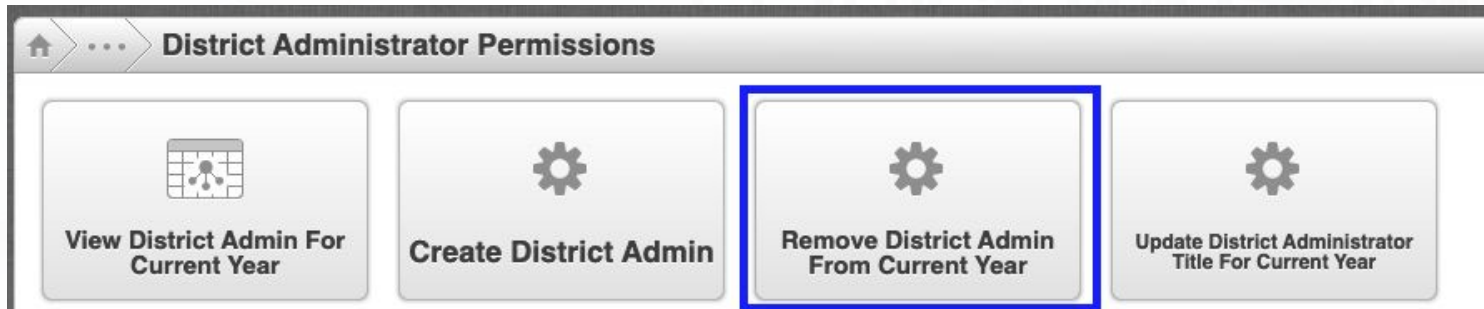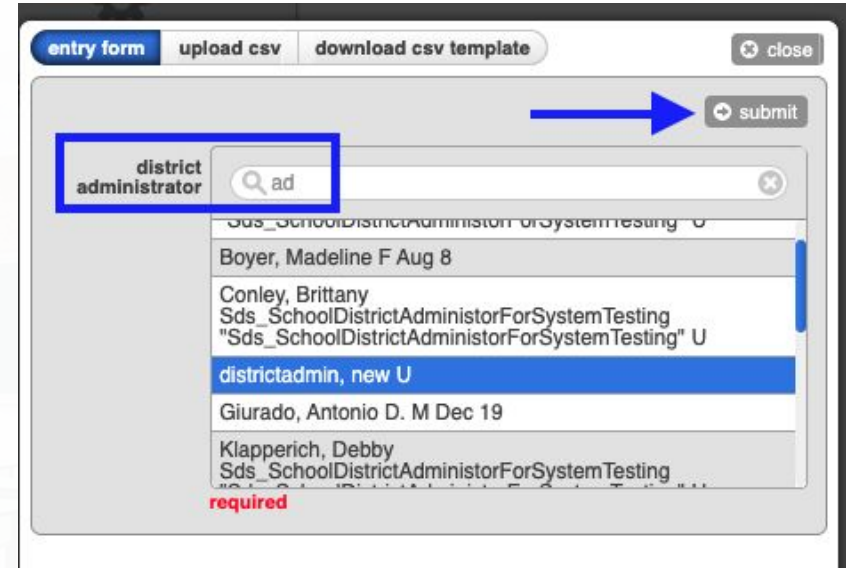
Permissions & Management

Viewing Existing Roles

- Use the "View School Admin/Specialist for Schools for Current Year" or "View District Admin For Current Year"
- You will then be provided with a table showing the staff member, their title, school, school year and if the account is active.
- A csv of the table can be downloaded

View School Admin For Schools For Current Year

Person Id	Person	Title	Predominant School	Other School	School Year	Application User Is Active
392	Aaby, David M. M Jan 13	Dean	Shadow Lake Elementary	Shadow Lake Elementary	2021/22	True
28318	Barber, Martin J. M July 3	Vice Principal	Tahoma Senior High School	Tahoma Senior High School	2021/22	True

Permissions & Management

Viewing multiple Roles for users

- Go to Homeroom Users and Permissions > "View Users and Their Person Roles"
- Use the search box in the upper right & click enter
- The table will show you the username, email address, if the user is active, and the specific person roles that have been assigned for the current school year.

Permissions & Management

Creating / Activating New Users

- 3 methods of staff activation
  - SSO
    - Accounts are created upon user authentication
  - Upload CSV
  - Manually activate
- Will need user's external application user name & email address. Can use the "View External Application User Names" table to search. (**If sent to us from your SIS)

** We do suggest creating / activating users after their person role has already been added.

Permissions & Management

Creating / Activating New Users

Use the "View External Application User Names" table to search.

- External Application Username column - Username from SIS
- SDS Account is activated column - tells us if the user already has a user account created.
- External Account is Activated - tells us their active status from your SIS, must be true to be activated in School Data.

** We do suggest activating after the person role has already been added.

View External Application User Names

External Account Is Activated	External Application User Name	Person	S D S Account Is Activated	Is Employee	Employee Id
false	w%repl	% Unfilled, Playground #1 M	false	True	1
true	hthsunfilled	%Ths-Unfilled, Hanson,C 6Hr M	false	True	13
false	a%unfi	% Unfilled, Classified #2 F	false	True	26
false	h%unfi	%Unfilled, Tech F	false	True	27

Activate New Account

Enter the username and email address of the user to activate their account. A password reset request will automatically be sent to the user.

User Name

Users Email Address

Send email notification to user?

True | False

Upload CSV | Submit

Permissions & Management

Assigning Application User Roles

Granting an activated user roles to specific applications.

These are the standard Default Roles given to users:

- Homeroom V2 User
- Charts User
- Report User
- Student Detail Manager
- DataTables User

Default Application Permissions can be customized per district and by Person Role.
Submit a request to support@schooldata.net for more information.

Permissions & Management

Adding additional application user roles

Depending on your district's use of applications, you may need to assign different roles and permissions for the different apps. You can assign them by person role or to a specific user.

For instance:

- A role to impersonate other users (often extremely limited role) would be assigned to individual users.
- 504 or Intervention Application users may be all users with the specialist role.
- Student Data Grids - can schedule a delivery may be all users with the district admin role or specific users.
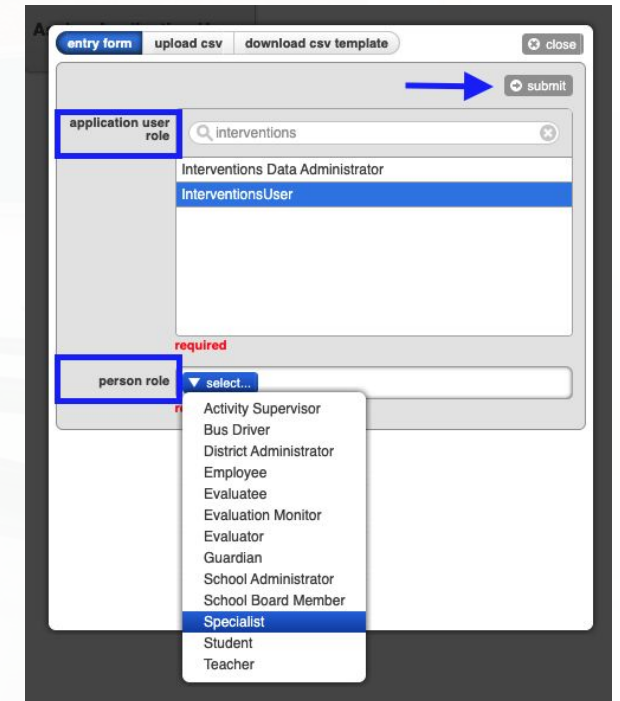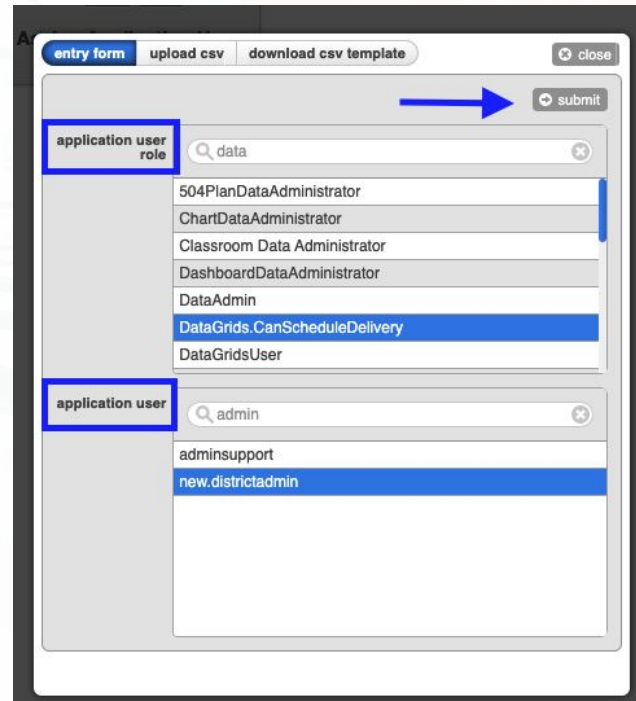
Permissions & Management

Tips & Tricks for Duplicate User accounts

- Sometimes you might see a personal email. This could mean you are looking at their Guardian account, or an HRM+ account. Check to see if they show their assigned person roles. If not, their Employee account may still need to be created. Send a ticket to support@schooldata.net if you have any questions about a specific user.

- Use the "View External Application User Names" table to search.

- Use the Is Employee column, we want this to be TRUE

- We recommend adding the person roles to users before activation, this order of operations will automatically assign their Application User roles upon account creation, to avoid waiting on the overnight migration to add them.

Permissions & Management

other troubleshooting tips

- Trouble activating an account: [Help Article](#)
  - Sometimes a personal email has been used in addition to the email in the SIS.

Data Loading, Reports & Notification Letters

AD

Data Loading Service

When you're making data-driven decisions, getting timely and accurate information is critical. Our partnership with many common assessment vendors means you get faster access to usable data.

- **What is our Data Loading Service?**
  - Our Data Loading Service is where we load your student assessment test score data for you, so you can focus on other things.

- **How does it work?**
  - You decide which assessments you want us to load for you.
  - You give us access to pull the score data from the vendor.
  - We Load your Assessment Test Scores for you on your defined dates
  - You get to focus on using the data, not stress about getting it loaded.
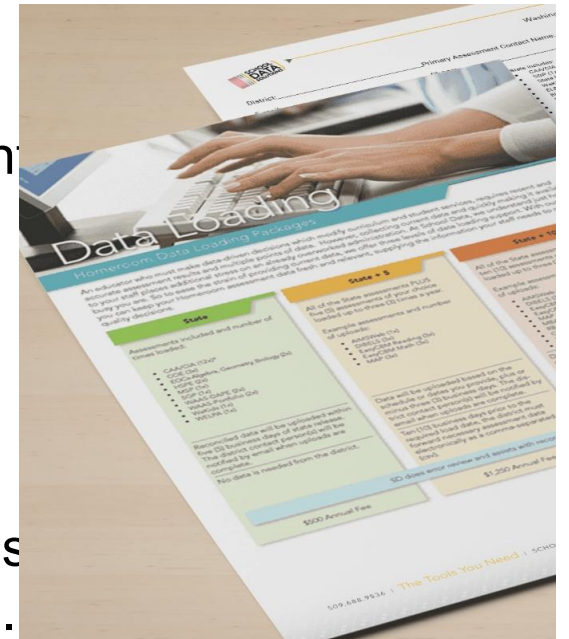
Data Loading Service

- **Thinking forward to next school year, what does your district want to do?**
  - Do you want to load your own Assessment data?
  - Do you want us to load your Assessment data for you?
- **How to sign up?**
  - Fill out the Data Loading order form.
  - Select your package: State only, State +5, State +10.
  - Follow the steps we give you to grant us access to the vendor sites.
- **Questions?**
  - Contact us at: **support@schooldata.net**

Data Loading Order Form

Date: _____/_____/_____

Data Loading Packages

☐ State	$500
☐ State + 5 Additional Assessments	$1250
☐ State + 10 Additional Assessments	$2000

Package Upgrades

☐ Graduation Pathways Weekly	$250
☐ IABs/FIABs Weekly	$250
☐ SBA End of Year Weekly	$150
☐ iSAT End of Year Weekly	$150

District:_____

State: _____

Primary Assessment Contact: _____

E-mail:_____

Phone:_____

Select Automated Assessment Loaders: (does not count towards additional assessments)

☐ STAR Reading   ☐ STAR Math   ☐ i-Ready Reading   ☐ i-Ready Math

Include additional assessment information below. If an assessment needs more than three loads, continue dates on the next row.

Assessment Name	Frequency	Load Date 1	Load Date 2	Load Date 3	Grade Levels / Notes
1					
2					
3					

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State Test Scores Report/Notification Letters

- **State Test Scores Report:**
  - Use this Report with the Preliminary spring SBA Math and ELA scores to show families where their students stand.
  - Customize the report with your district logo and modify the messaging as needed.
- **Notification Letters**
  - Email families the auto-generated, presentation-ready PDF using our Notification Letters feature.
  - Contact us for more information and to get started
- **Questions?**
  - Contact us at: **support@schooldata.net**
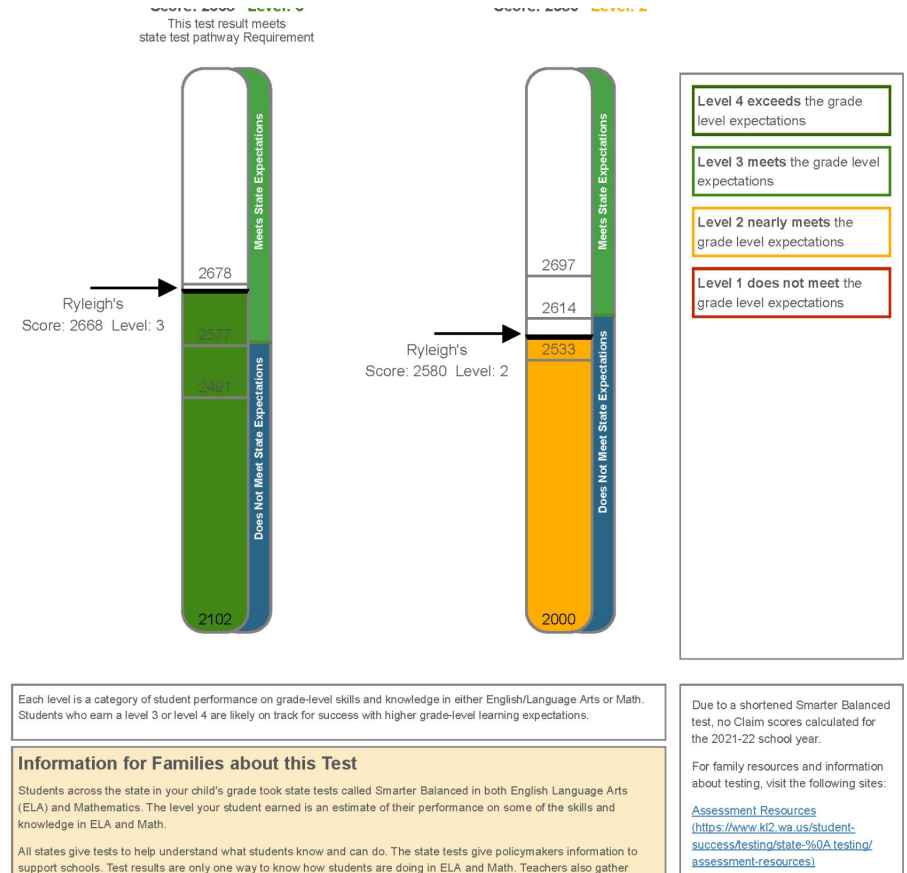
Annual check in - Don't forget!

With each year there are always changes, don't forget a few things you should let SchoolData.net know about:

Switching to a new SIS? - If you are a Skyward district and will be switching to Qmlativ, or any district switching to another Student Information System (SIS), **we need to know as soon as possible and when**.

Term/Grading setup changes? - districts change their term/grading/scheduling structure each year, many more these past couple years due to COVID. If you are changing or changing back for next year, these affect areas of your SchoolData.net applications that you may not realize:

- Risk - in relation to MS or HS grading, schedule of updating for any level
- Student Schedule view or Gradebook view
- Four Year Plans templates (part of the HS and Beyond Bundle)

Need to let us know? email
support@schooldata.net

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Annual check in - Did you know?

Here are some tools that SchoolData.net provides that you might consider:

ODBC Access - If you are a WA Skyward district, ODBC access provides a variety of benefits: more than 4 years back if a historical pull is needed, same day historical load, allows us to access/generate District specific/custom data tables, and access to new data points as needed (though there may be a cost involved if too unique and no location to store yet in Homeroom).

District Authentication (ie district managed) accounts - Our team has worked with many single sign-on type platforms, like Google, ClassLink, etc, to provide seamless log-ins for staff and students.

Want to know more? email
support@schooldata.net

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Student Groups & Dashboards

Hr

Selecting Student Group

Mass updating of Users Default Student Group and/or Dashboard can be requested

*Submit a ticket to support@schooldata.net We will run a procedure that will successfully update users default Student Group and/or Dashboard to their current year group and Dashboard for their current Person role for *most* users.

Risk Indicators

Risk Index - September Risk & Custom Indexes

Depending on your district's customizations it is recommended to check the risk index at the start of the year.

Some configurations will require updating for the new school year.

*Submit a ticket to support@schooldata.net if your risk indicators need updating.

Contact Support for Help or more Info on what was shared

- Request Help via the **?** in the application
- View My Requests
- Email: support@schooldata.net
- Call: (509) 688-9536

[Homeroom Dashboard Basic/How to articles](#)

Slides are posted in ProDev. The FAQs document will be posted soon to the [Professional Development Opportunities](#) section in the Help Center.
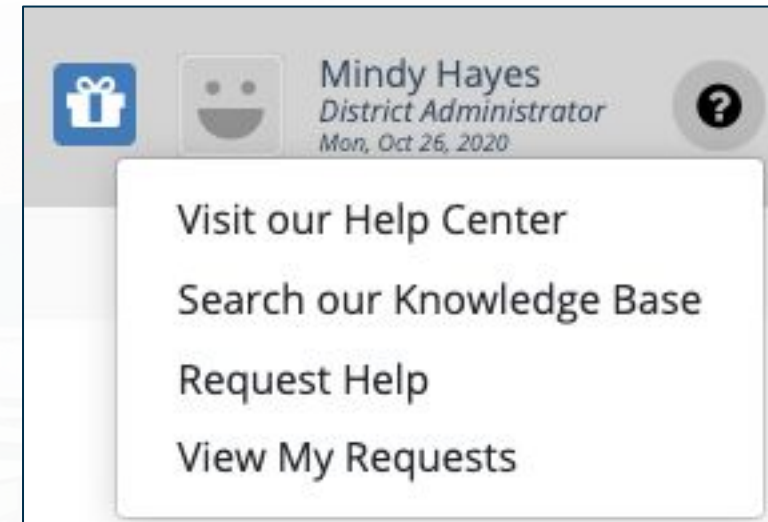
Q & A

THANK YOU

PRESENTED BY:

SchoolData.net