TEXAS STUDENT DATA SYSTEM
Field Coordination Network Update – TSDS TEAL Roles and Accounts

November 1, 2013   TEA - Cynthia Cammack and David Butler

Hello everyone. Thank you for joining us for this TSDS Field Coordination Network Update.

I want to make sure you can hear me. Please raise your hand if you are able to hear.

My name is Cynthia Cammack and I am here with several other TSDS team members. I'll let them quickly introduce themselves.

You are all muted; however, please feel free to ask questions either by raising your hand (and we will un-mute you) or by typing your questions in the chat field. We want to be sure questions are answered. If we run out of time, we will follow-up with responses by email to the group.

We are recording this session.

AGENDA

I.   TEA-Login (TEAL) Process for TSDS Users

II. TSDS TEAL Roles for studentGPS™ Dashboards

III. Dashboards Account Provisioning

IV. Questions?

As we have talked with ESC Champions in training, we have realized that many of you are new to the TEA-Login environment, or TEAL. If you do not have access to the TREx or Unique ID applications, you may not yet have a TEAL identity or account. We will go over some basic TEAL functionality. For some of you, this will be a review. Then we will review the roles and access specific to TSDS studentGPS ™Dashboards.

Field Coordination Network - TEAL for TSDS - 11/1/2013
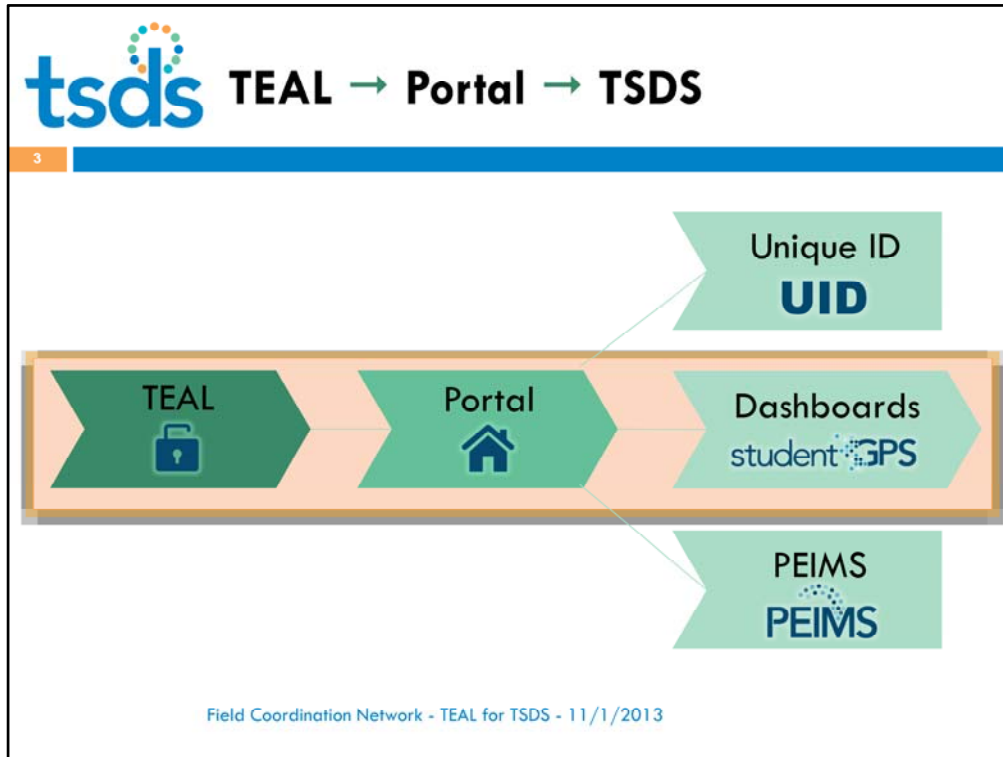
Key to understanding TSDS is the basic architecture that flows through the TSDS Portal. All users log on to TEAL, then access the TSDS Portal. From the Portal, users can move back and forth between TSDS applications. The TSDS Portal acts as the entranceway and facilitator for downstream applications, including studentGPS™ Dashboards. From there, users will also have access to tools such as the Validation Tool and TIMS.
Those of you who work with Unique ID, which is already in production, have experienced this arrangement.

Let's take a quick look at how each TSDS piece appears to the user. Shown here is the TEAL login screen, already familiar to many of you. You can get to the TEAL login page at the URL listed here, or from the TEA website front page.

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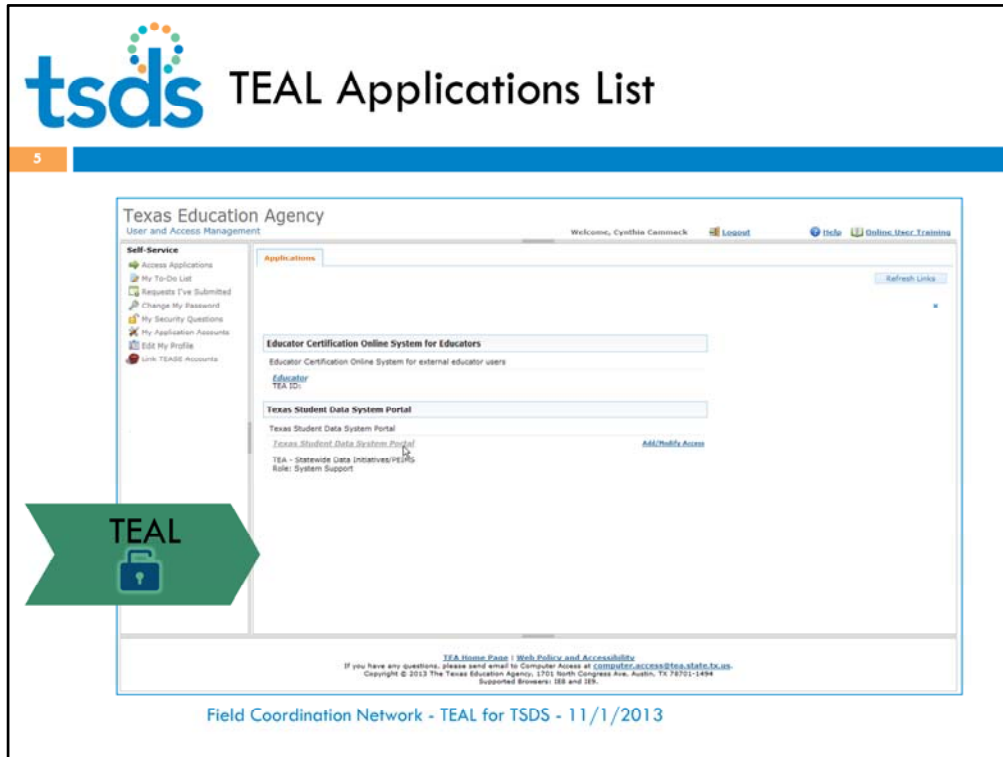
Once you log in, you are on the TEAL applications list page. This page lists the applications to which you have access. As you can see, I have access to ECOS, as an Educator, and to the Texas Student Data System Portal, or TEAL. Notice the menu on the left. From this location I can perform TEAL-related tasks, such as access applications, check on Requests I've Submitted (that's a handy one), change my password (another good one), or my security questions, or edit my profile.

The Texas Student Data System Portal link is an application that launches all TSDS applications: Unique ID, the ODS, studentGPS Dashboards, and eventually PEIMS.
If I click this link...
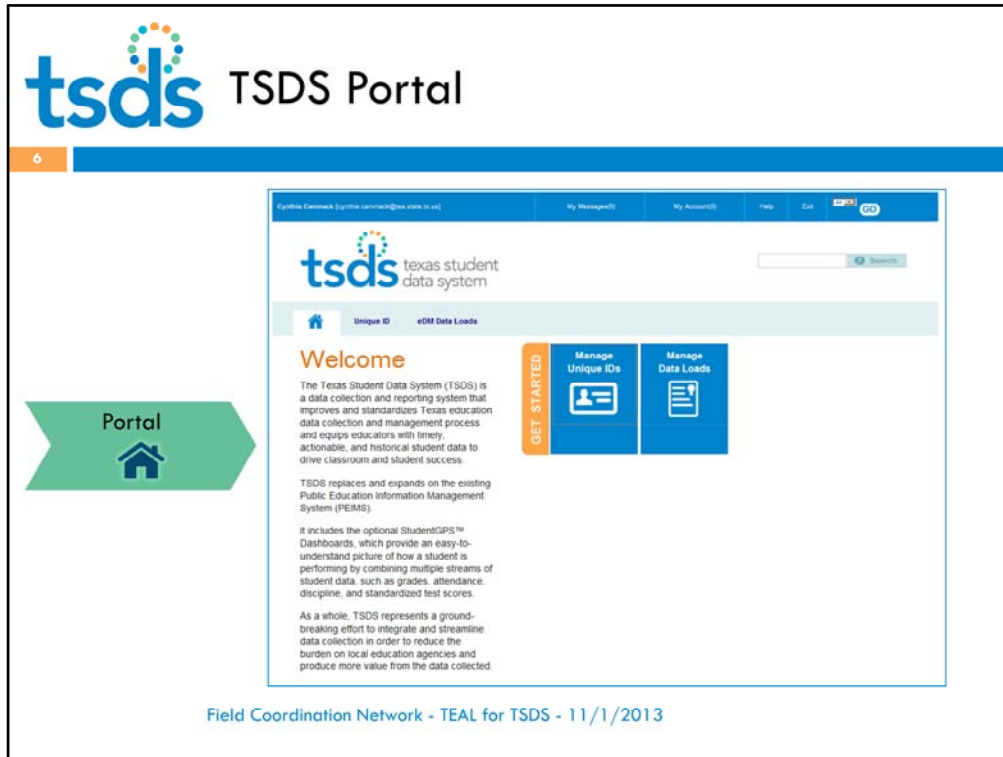
It takes me to the TSDS Portal, the launch pad for all things TSDS. This is my view of Portal in the production environment. As you can see, I have access to Unique ID and to the ODS Data Loader. As we roll out more of TSDS, you will see new features show up on the Portal. For example, access to our TIMS application will show up soon, November 15.

Notice the dropdown list and GO button at the top right of the Portal. Many of you support multiple LEAs. If you are granted access to applications for multiple districts, you will be able to select them from the dropdown list and go back and forth between them.

If I click on either of those big blue icons, it will take me to the application I want to work in, in this case, either Unique ID or the ODS Data Loader, used to load data for the Dashboards.

Let's go back to the login page for a moment.

From this page, I can also request a new user account. For the debut of the Dashboards, there will be an option to provision LEA staff roles automatically. However, for most TSDS users, ESC Champions included, requesting an account is his is the first step for a TSDS user.

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From this page, I can also request a new user account. For the debut of the Dashboards, there will be an option to provision LEA staff roles automatically. However, for most TSDS users, ESC Champions included, requesting an account is his is the first step for a TSDS user.

Enter information for your user profile, and the system creates your account.

You will first complete and submit a TEAL user profile. Note the Organization Type dropdown list. You would select the ESC option; LEA users would select either School District or Charter School.

For LEAs and ESCs users, the system will automatically provision a basic TEAL account with this information. Within a few minutes, you will receive a confirmation email message with your user name and temporary password.

When you first log on, the system will prompt you to reset your password, agree to the security conditions, and set up three security questions that can be used to reset your password. Just follow the prompts - and remember your password and security answers!
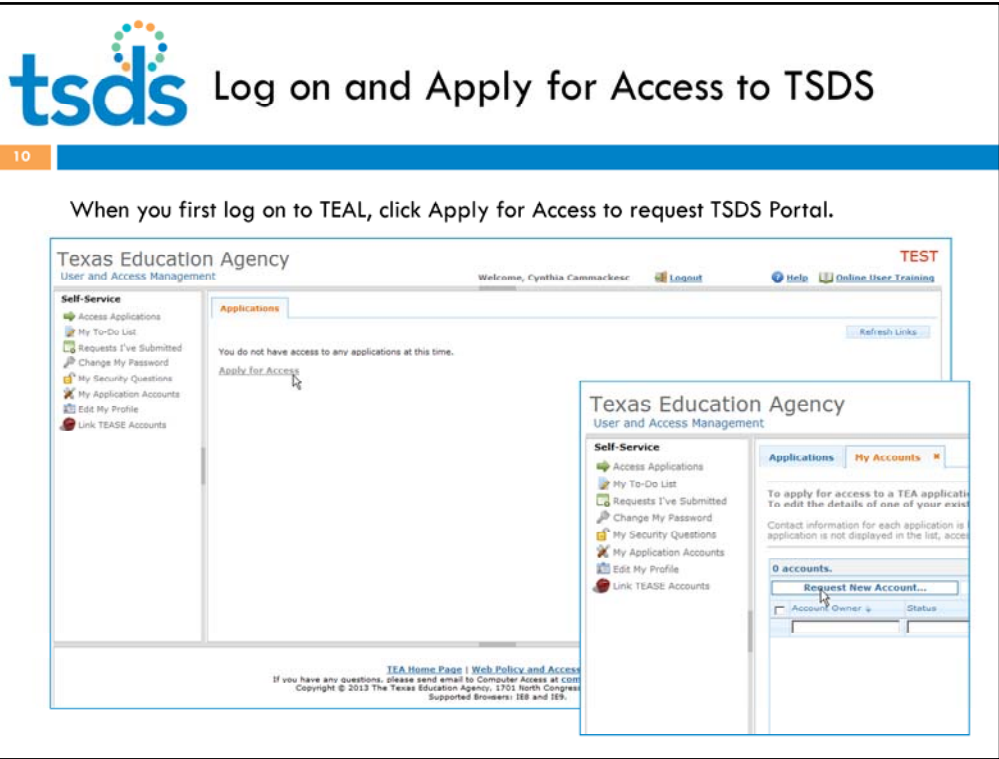
The first time you log on to TEAL, you will see a link to **Apply for Access** to applications.
Click this link to request access to TSDS.
On the next screen, click **Request New Account.**

Please note – if you already have access to TSDS Portal for Unique ID, you will click the
Add/Modify link to request the new roles you need.

On the next screen, you will see a list of available applications. The list shown is in our test system, so looks different from the one you will see in the actual Production system. However, you can see TSDS Portal in the list, near the bottom. You will select Texas Student Data System Portal, and then click **Go To Account Details Form**.

tsds Enter Employing Organization

At the top of the next screen, enter the Organization you work for.

Application access details

Steps for adding access

1. Enter your Employing Organization (name or organization number).
2. Click the checkbox/radio button for the role(s) that you are applying for.
3. If there are parameters for the role(s) selected, enter that information.
4. Click the "Done" button to **queue** your request. This does not submit your request to TEAL.
5. Click the "Save Changes" button. This will then submit your access request to TEAL.

Employing Organization

Organization:
Who do you work for? In other words, what organization employs you (e.g. district, ESC, charter school)?

EG X EDUCATION SERVICE CENTER (057950)

Roles & Parameters

☐ TSDS studentGPS Dashboards Configurator

☐ TSDS studentGPS Dashboards

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On the next screen, there's a field at the top that's easy to miss. This field is for Employing Organization. You need to enter the organization you work for here. An LEA user would enter the Charter School or District. An ESC user would enter the ESC.
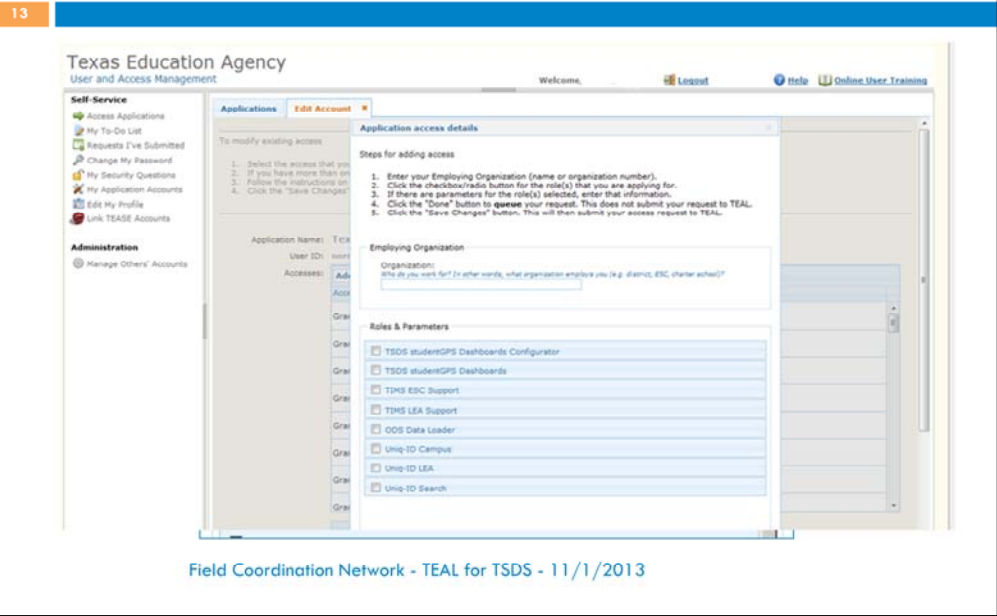
Now we get to the good part. This is the list of roles currently available in production to ESC and LEA users. Unique ID roles have been available since February, but there are some new roles available now.
Let's leave the screens for a moment and look at the new roles in more detail.

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Let's go over the roles that will be used specifically for Dashboards loading and access.

New TSDS Roles

Role	Description
studentGPS™ Dashboards User	An LEA authorized TEAL role for access to the Dashboards. For each user, it is mapped to one of the 7 local Dashboards roles. Access to TSDS with this role must be approved by the LEA Superintendent or designee. May be requested through traditional TEAL process or LEA may opt for automated provisioning.
studentGPS™ Dashboards Configurator	A *temporary* LEA authorized role that allows the user to configure LEA goals and provision accounts for other LEA users. Must be selected *with* the studentGPS™ Dashboards User role. Corresponds to the local System Administrator role in the Dashboards – usually for the LEA Dashboards or Data Steward. Access to TSDS with this role must be approved by the LEA Superintendent or designee and Approver enters the expiration date.
ODS Data Loader	Role for the scheduling and loading of data into the eScholar data warehouse. Access to TSDS with this role must be approved by the organization head (superintendent, ESC Director) or designee.
TIMS LEA Support	Role designed for LEA staff providing TSDS support for their own LEA. Access to TSDS with this role must be approved by the LEA Superintendent or designee.
TIMS ESC Support	Role designed for ESC staff providing TSDS support for one or more LEAs. Access to TSDS with this role must be approved by the LEA Superintendent or designee.

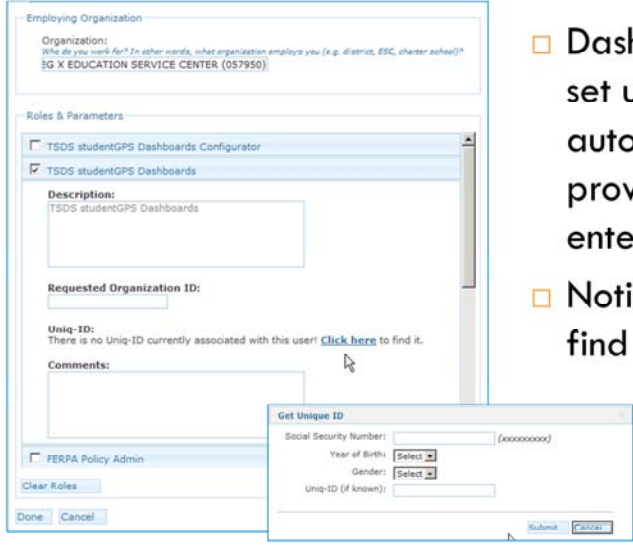Let's talk through these roles. (Read slide)

Going back to role selection in TEAL - When you select a TSDS role, you will usually be prompted to enter additional information. For most roles, including the ODS Data Loader and TIMS roles, you will enter the Requested Organization.

Important – An ESC user providing L2 support enters the ESC as Requested Org; if providing L1 support to LEAs, enters LEAs in this field – multiples separated by commas.

After you submit the request, TEAL routes it to all Organization Approvers entered here, as well as to the Organization Approver for your Employing Organization. For most users, these are the same, but for ESC users, there can be multiple approvals by your ESC Director and each LEA superintendent.

Dashboards users who are not set up via the automated account provisioning process will need to enter their Unique IDs during the request process. An LEA user can obtain his or her unique ID from the district, or search for it in TEAL using the Get Unique ID feature.

TEAL Request and Approval Process

1. User requests TEAL account (profile) and system sets it up automatically (but deletes later if no application is requested).
2. User logs on to TEAL and applies for access to TSDS Portal, and selects appropriate role(s).
3. Organization Approver (Superintendent, ESC Director, or designated <u>alternate</u>) approves access *within 5 days*
4. TEA SEDS Approver approves access within 5 days

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Once a user selects the appropriate roles and saves the request, the system sends notifications to Approvers.

So, the process for requesting access to TSDS Portal via the TEAL secure gateway involves the user completing first completing a request for an account – by completing and submitting the profile. Note that if the account is not used, it will be deleted. – currently within 60 days.
First the Organization Approver (Superintendent, ESC Director, or designated <u>alternate</u>) approves access. Then the request is routed to the TEA SEDS Approver to approve access.

And that's all there is to it!

Now we will go over Dashboards Account Provisioning, including Claim Sets and the automated process. Many of these slides are from the Technical Training. Please review that training if you want more detail after this presentation.

FERPA and District Data Use Policies

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Key points about policy –

☐ The studentGPS™ Dashboards application provides different levels of user access to comply with FERPA

☐ LEA staff must ensure that user access roles in the Dashboards align with district data policies

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- The studentGPS™ Dashboards application provides different levels of user access to comply with FERPA

- User access is determined by a person's district position title as defined in the district SIS

  - LEAs and SIS vendors determine the relevant fields in the SIS

    - Vendors map to this in XML

  - No mechanism to set roles on person-specific basis

- Staff organizational assignment (campus or district) determines the breadth of access to the Dashboards

- User access roles and any changes should align with district data policies

tsds studentGPS™ Dashboards Staff Classification & Claim Sets

- The admin tool in the studentGPS™ Dashboards application uses LEA position titles from the LEA source systems (HR or SIS) to link to the studentGPS™ Dashboards roles or 'claim sets'

- studentGPS™ Dashboards roles determine the 'claim' a person has to specific data in the Dashboards

- This is done via an extraction of the TEDS StaffAssociation interchange that can be mapped by the LEA Steward within the Dashboards administrative panel

- The LEA needs to determine that their source system can extract the TEDS StaffAssociation interchange

The admin tool in the studentGPS™ Dashboards application uses the district position titles from LEA source systems to link to the studentGPS™ Dashboards roles or 'claim sets'. The studentGPS™ Dashboards roles determine the 'claim' a person has to specific data in the studentGPS™ Dashboards

tsds Dashboards Staff Classification & Claim Sets

Claim sets are used to map LEA job codes – taken from the LEA source system – to Dashboards roles

- Each user's level of access is determined by his/her job code as defined in the source system (HR or SIS) – for example, "teacher", "principal", "coach"

- The extracted interchange is used to port the LEA job codes to the Dashboards so they can then be mapped to claim set roles by the LEA Steward in either single or batch mode

- The LEA Steward maps job codes to claim set roles; each role is associated with an organization level (superintendent – district, principal – campus)

- Mapping is done by job code, not by individual; therefore, every principal will have the same level of access within his/her LEA

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Roles within the studentGPS™ Dashboard

- Superintendent
- Leader (can be LEA or campus level)
- Administration
- Principal
- System Admin or LEA Data Steward and Key Designees
- Staff
- Specialist (generally used for teachers)
- None (or blank – means no access)

NOTE: More detailed role descriptions are available as an appendix at the end of this presentation

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Any staff member (besides principal or superintendent) who needs access to student-level information in the dashboards will need the following:

Dashboard/DDM role as "Specialist"

Proper staff/student association via UniqueID through the StudentCohort interchange

Log in as System Administrator and select Position Title Claim Sets.

Setting User Access Levels in the Administrative Tool: Step 2

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- ❑ The user can select Single Edit or Edit Batch
- ❑ The user can also select the Position Title from the drop down menu

The user can select Single Edit or Edit Batch. The user can also select the Position Title from the drop down menu.

- Select Single Edit button
- Select Position Title drop down to see list of district titles and select title
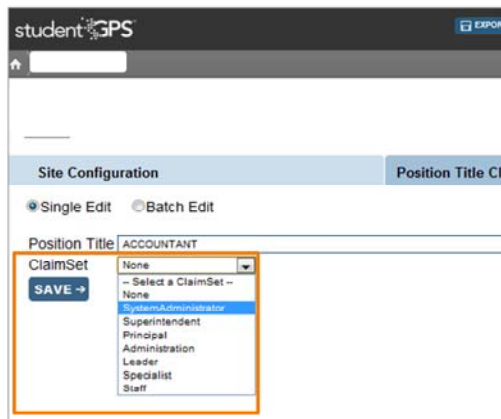
- Select Claim Set drop down
- Choose desired access setting
- Click Save
- Wait at least 10 minutes
- Test by impersonating user
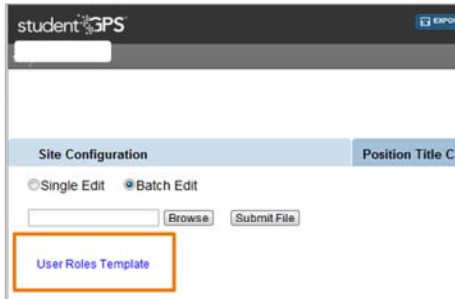
- Select the Batch Edit button
- Click 'User Roles Template' to export current list of district position titles and Dashboards claim settings (in xls)
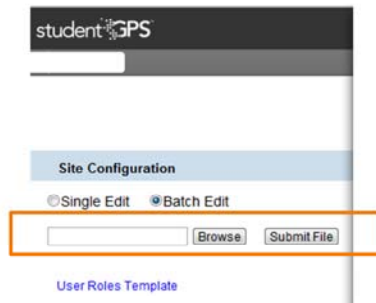- Be sure to use the 7 ClaimSet roles with correct spelling and punctuation when batch editing

- Review claim settings for each Position Title
- Make changes to Dashboards claim set using the list of options
- Save file to local drive

- Use Browse button to select updated file from your local drive
- Click submit to upload file
- Wait at least 10 minutes
- Test by impersonating user
- Note: Be sure to use the 7 ClaimSet roles with correct spelling and punctuation when batch editing

Trainer Questions:
1) How does the Single Edit work for Position Title Claim?
2) How does the Batch Edit work for Position Title Claim?

- Use the impersonation feature
- Search for name of person you wish to check
- On the search detail page, select 'Staff' button
- Use the 'LOGIN AS' button to impersonate specific user

Claim Setting Questions

- What if I want to review the roles I have now?
  - Use the Batch Edit feature to export current list of position titles and settings in Excel
- Can I change access for a particular person?
  - In the case where a specific person needs access, we recommend setting up a new position title for that person in your LEA source system. Once this is established, you can assign the desired studentGPS™ Dashboards claim setting for that position title.

- What if I want to review the roles I have now?
  - Use the Batch Edit feature to export current list of position titles and settings in Excel
- Can I change access for a particular person?
  - No. In the case where a specific person needs access, we recommend setting up a new position title for that person in your LEA source system. Once this is established, you can assign the desired studentGPS™ Dashboards claim setting for that position title.

tsds Dashboards Automated Provisioning

TEAL → **Dashboards** student GPS

Automated Process
Dashboards Configurator makes selection on local Dashboards screen

Confirm UIDs
System matches users via uploaded StaffAssociation interchange and Unique ID to one of 7 specific Dashboards roles

Permissions Granted
Dashboards Configurator/System Administrator sets up LEA users with Dashboard-specific roles and uploads into DDM

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About the Dashboards Automated Provisioning process...

The Dashboards Configurator will have the option to perform this task. If an LEA opts for the automated process via the dashboards downstream application, its user accounts will be created in TEAL, matched to Unique IDs, and then matched within the LEA Dashboards to specific roles set up during the claim set process.

Please note that LPR district System Administrators are an exception to this process. They will not need the Dashboards Configurator role, since they are already set up as System Administrators in their local Dashboards.
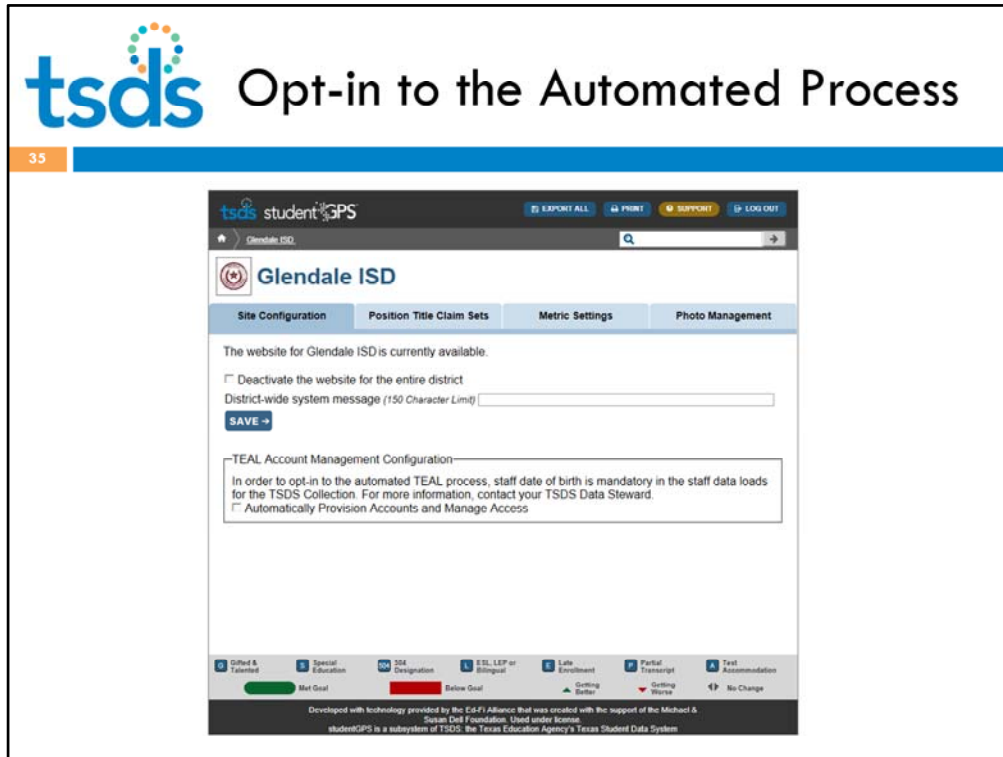
This screenshot shows the Dashboards screen used by the Dashboards Configurator / System Administrator to opt in to the automated process for TEAL account provisioning. Checking the checkbox triggers the process.

After the checkbox is checked, during that night's dashboards data upload, the staff data required by TEAL will be extracted from the Dashboards database and passed into an automated TEAL account process. This is the same TEDS StaffAssociation interchange file that powers staff metrics in the Dashboards. There is no additional extract needed by your HR vendor or extractor. The only requirement is that staff date of birth be included in the extract (if it is not already).

So, some key points for Automated Provisioning of TEAL
Uses the TEDS StaffAssociation interchange to map roles
Include the date of birth – an optional field but needed for this operation
The Dashboards Configurator user must select the Configurator role on first logon to the Dashboards
accounts -

Checking opt-in indicates approval by LEA TEAL Approver
The Organization Approver does not approve accounts on one-by-one basis but will receive a blanket notification – shown here.
Each user receives the typical email notification with TEAL username and password

What additional questions or comments do you have?

studentGPS™ Dashboards Roles & Claims to Data: Staff & Specialist

	Description	District	School	Operational	Classroom	Students
Staff	User may view the district-level Dashboards or school-level Dashboards only (dependent on organizational assignment. This is a "metrics-only" view and users are restricted from seeing any student or staff level information	If district org	If school org	No	No	No
Specialist	User may view only those students that are associated to their staff ID. District/Campus specialist: User may view only those students in the district of a specific school in a capacity other than teacher (as determined by student rosters, e.g., counselor). Teacher: User may view only those students across the specific school(s) that are associated with user as a teacher (students assigned to the teacher's class sections). Teacher can see a school level view; student lists are limited to those assigned to teacher's sections.	If district org	If school org	NO	Rosters or Classes in District or School	Rosters or Classes in District or School

As an appendix, here is a more detailed list of studentGPS™ Dashboards Roles & Claims to Data.

tsds

studentGPS™ Dashboards Roles & Claims to Data: Leader, Administration & Principal

	Description	District	School	Operational	Classroom	Students
Leader	User may view the student Dashboards for all students currently enrolled in the district or specific school (depending on organizational assignment). User cannot see any operational or staff metrics.	If district org	If school org	No	Yes	Yes
Administration	User may view the student, classroom and full campus Dashboards for all students and teachers currently enrolled in the district or specific school (dependent on organizational assignment).	If district org	Yes	Yes	Yes	Yes
Principal	User may view the student, classroom and full campus Dashboards for all students and teachers currently enrolled in the specific school. May also view campus goals and do "what if" analysis of goals, but changes won't be saved for future sessions.	No	Yes	Yes	Yes	Yes

studentGPS™ Dashboards Roles & Claims to Data: Superintendent & System Admin

	Description	District	School	Operational	Classroom	Students
Superintendent	User may view the student, classroom and full campus Dashboards for all students and teachers currently enrolled in the district. User also has the ability to set and manage district and campus goals or thresholds.	Yes	Yes	Yes	Yes	Yes
System Admin or LEA Data Steward and Key Designees	User may impersonate the view of the student, classroom and full campus Dashboards for all students and teachers currently enrolled in the district	Yes	Yes	Yes	Yes	Yes