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Schoolnet Roles and Permissions

General Overview and Key Reminders
for Setting Up Roles and Permissions
for Schoolnet



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Overview Outline

- **Quick Overview of Schoolnet Roles and Permissions**
 - Tools, Documents, and Where to find out more information
- **What is new with Schoolnet Roles and Permissions?**
 - New doc for SLMCs and ITFs (as of February 2015)
 - Teachers Creating Benchmarks (as of fall 2014)
 - Report Manager (as of fall 2014)
- **What is coming next?**
 - Options for Co-teachers
 - Options for collaborating on assessments via Co-Author
- **Roles and Reminders for Creating District Benchmark Assessments**
- **Exporting/Importing Schoolnet Roles Information for your District**
- **Important Reminders about Roles Setup in PowerSchool**
- **Giving Too Much or Not Enough Access**
- **Resources, Contact Info and Q&A**

Two Key Points about Roles

- **Teachers have what they need natively!**
Anyone whose default role in Schoolnet is a teacher has all the roles and permissions he/she needs to conduct his/her class (use lesson planner, schedule, administer and score assessments, etc.) for his/her students. Only add permissions if you want a teacher to contribute outside of his/her classes.
- **One Default**
All users should have one and only one default role selected for Schoolnet (in PowerSchool).

Schoolnet Default/System Roles

- **Leadership**

- Add if needed (all other roles are already included for Leadership):
 - Test Item Administrator (if you need to view assessment items)
 - Access to Curriculum Management (if you need to manage curriculum)

- **Staff**

- Add any of the additional operations as needed based on the responsibility of the individual staff member

- **Teacher**

- Has all the roles and permissions needed to conduct classes and view student information for his/her own sections
- Only add roles if you want a teacher to have access to information beyond his/her sections and students
 - Access for Teachers to Share Assessments (this role is **ONLY** for teachers)

Additional Roles (optional member roles)

- Test Item Administrator
- Access to Report Manager
- Access to Teacher and Section Level Data
- Access to Aggregate Level Data
- Access to Approve Instructional Materials
- Access to Approve Assessment Items
- Access to Assessment Management
- Access to Curriculum Management
- Access to Teacher Lesson Planner
- Access for Teachers to Share Assessments

Two Key Points about Roles

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Tools and Documents

- Roles and Permissions Document
 - Defines the roles for Schoolnet in NC
- Roles Matrix
 - Visual display of the document
- Roles Documents
 - Specific scenarios for setting up users with appropriate access (for example how to set up access for instructional coaches)

Roles Matrix

Rows – what a user can do (the operations)

General	View basic student information
	View student contact information
	View student discipline information
	View student economic information
School and District Data	Create and Edit Reports
	View Teacher and Section Level Data
	View Published Reports
	Manage reports
Classrooms	Approve section assignments
	Manage curriculum
	Manage instruction
	Review instructional materials
Assessment Admin	Add or update student responses
	Create and edit test items for an institution
	Create and edit tests for an institution
	Create test windows
	Generate student answer sheets
	Modify tests
	Pre-slug OMR Forms
	Schedule tests
	Review item, passage, or rubric
	View test content
	View Restricted Content

Roles Matrix: Rows

General
School and District Data
Classrooms
Assessment Admin

HOME BASE NC INSTRUCTIONAL IMPROVEMENT SYSTEM

School & District Data Reports & Indicators | Classrooms Posters, Reports, Planners | Assessment Admin Create & Monitor

Welcome back, Teacher.

Your last visit was yesterday. Your role is Teacher at Middle School 2234

NC Educator Effectiveness

HOME BASE INSTRUCTIONAL

Welcome to Home Base, North Carolina learning. Home Base provides foundational support for students to succeed. Home Base support: learning and strengthened educator effectiveness.

ScanIt Starter

My Classroom

The Rows in the Matrix map to the Modules in Schoolnet

Roles Matrix: Columns

Columns - Names of Roles that you select in PowerSchool for Schoolnet

Default Role: Leadership	Default Role: Staff	Default Role: Teacher	Optional Member Role: Test Item Administrator	Optional Member Role: Access to Report	Optional Member Role: Access to Teacher at Spec Level Data	Optional Member Role: Access to Aggregate Level Data	Optional Member Role: Access to Approve Instructional Materials	Optional Member Role: Access to Approve Assessment Items	Optional Member Role: Access to Assessment Management	Optional Member Role: Access to Curriculum Management	Optional Member Role: Access to Teacher Lesson Planner	Optional Member Role: Access for Teachers to Share Assessments
x												
	x	x										
x				x								
x					x							

Defaults
Select One!

Note: When assigning system roles in Schoolnet, only assign one system role per person. If more than one system role is assigned, Schoolnet will default to the least permissioned role. For example if a staff member is assigned a system role of Leadership AND Teacher, Schoolnet will default to the roles of a teacher.

Roles Matrix: Columns

Columns - Names of Roles that you select in PowerSchool for Schoolnet

Default Role: Leadership	Default Role: Staff	Default Role: Teacher	Optional Member Role: Test Item Administrator	Optional Member Role: Access to Report Manager	Optional Member Role: Access to Teacher and Student Data	Optional Member Role: Access to All Available	Optional Member Role: Access to Approve Instructional Materials	Optional Member Role: Access to Approve Assessment Items	Optional Member Role: Access to Assessment Management	Optional Member Role: Access to Curriculum Management	Optional Member Role: Access to Teacher Lesson Planner	Optional Member Role: Access for Teachers to Share Assessments
x												
x		x			x	x						
x												
x					x							

Optional Roles

Test Item Administrator is a special case!

Even if you are Leadership at the district level, you still need this role to see items and to create and edit test items and tests for an institution.

This role is NOT for teachers.

Roles Matrix: Columns

Columns - Names of Roles that you select in PowerSchool for Schoolnet

Default Role: Leadership	Default Role: Staff	Default Role: Teacher	Optional Member Role: Test Item Administrator	Optional Member Role: Access to Report Manager	Optional Member Role: Access to Teacher and Section Level Data	Optional Member Role: Access to Aggregate Data	Optional Member Role: Access to Approve Additional Materials	Optional Member Role: Access to Approve Assessment Items	Optional Member Role: Access to Assessor Management	Optional Member Role: Access to Curriculum Management	Optional Member Role: Access to Teacher Lesson Planner	Optional Member Role: Access for Teachers to Share Assessments
x					x							
x		x			x	x						
x				x								
x					x							

Optional Roles Caution – Access to Teacher and Section Level Data

This allows users to review report data for ALL teachers and/or sections within their school or district.

This role is NOT for teachers.

Roles Matrix: Columns

Columns - Names of Optional (or additional) Roles that you select in PowerSchool for Schoolnet

Default Role: Leadership	Default Role: Staff	Default Role: Teacher	Optional Member Role: Test Item Administrator	Optional Member Role: Access to Report Manager	Optional Member Role: Access to Teacher and Section Level Data	Optional Member Role: Access to Aggregate Level Data	Optional Member Role: Access to Approve Instructional Materials	Optional Member Role: Access to Approve Assessment Items	Optional Member Role: Access to Assessment Management	Optional Member Role: Access to Curriculum Management	Optional Member Role: Access to Teacher Lesson Planner	Optional Member Role: Access for Teachers to Share Assessments
x					x							
x		x			x							
x						x						
x												
x												

Optional Roles

Can be added to give additional rights to users. Most of the time this will be for staff or in special cases for teachers who need some roles associated with leadership.

Roles Matrix

Default = **YELLOW**
 Special = **BLUE**
 Caution = **RED**

Teacher permissions to access data for the students that they teach are inherent to the role of Teacher.

	Operations	Default Role: Leadership	Default Role: Staff	Default Role: Teacher	Optional Member Role: Test Item Administrator	Optional Member Role: Access to Report Manager	Optional Member Role: Access to Teacher and Section Level Data	Optional Member Role: Access to Aggregate Level Data	Optional Member Role: Access to Approve Instructional Materials	Optional Member Role: Access to Approve Assessment Items	Optional Member Role: Access to Assessment Management	Optional Member Role: Access to Curriculum Management	Optional Member Role: Access to Teacher Lesson Planner	Optional Member Role: Access for Teachers to Share Assessments	Description of Operations (and important notes to keep in mind when assigning roles and permissions in your LEA/School)
General	View basic student information														Allows users to view student level information in the (MYOR) institution where the operation is assigned. Do NOT give this to Teachers or they will see All of the students in the entire institution. Teachers do not need this for the students in their sections. It is inherently granted to them.
	View student contact information	x					x								Allows users to view student contact information in the institution where the operation is assigned. This is a "booster" operation that will only allow you to see more data on the students that are already visible to you.
	View student discipline information (Not Currently in NJ)	x	x				x	x							Allows users to view student discipline information in the institution where the operation is assigned. This is a "booster" operation that will only allow you to see more data on the students that are already visible to you.
School and District Data	Create and Edit Reports	x				x									Allows users to use Report Builder to create and edit reports.
	View Teacher and Section Level Data														Allows users to view report data at the teacher and/or section levels. Administrator: This operation allows teacher to view published reports, but will also allow teachers to see section level data for sections beyond their own. However, the operation will not allow the teacher to view student level data for students not assigned to them.
	View Published Reports	x	x			x		x							Allows users to View Published Reports.
Classrooms	Manage reports	x				x									Allows users to add or remove a published report from an institution report bank.
	Approve section assignments	x													Allows users to review and approve staff requests for access to specified sections.
	Manage curriculum											x			This operation should only be granted to users at the district level. It allows users to create/edit curricula and curricular units in OMS. In Align, these users can map courses to curriculum. Additionally, they can map standards (map two or more sets of standards to each other), as well as create, edit and delete local (not Academic Anchors) standards.
Assessment Admin	Manage instruction														Allows users to view the Lesson Planner and the Student Performance area for all teachers in the same institution or lower. Allows access to schoolwide teacher and student data at the institutions they are assigned. This should not be given to teachers.
	Review instructional materials	x											x		Allows users to approve materials (lessons, resources, units, assessments) submitted for approval to the public bank of their primary institution and submit for approval materials to the bank of the tier above them.
	Add or update student responses	x						x			x				Grants users the ability to input or enter corrections to student responses and scores for students at the institution where the operation is given.
Assessment Admin	Create and edit test items for an institution				x										Grants users the ability to create, edit, copy, and delete test items.
	Create and edit tests for an institution														Grants users the ability to create and edit test drafts.
	Create test windows	x								x					For district tests, grants user the ability to create test windows.
	Generate student answer sheets	x								x					Allows users at an institution to generate answer sheets for students assigned a test.
	Modify tests	x								x					Grants users the ability to make limited updates to non-draft tests.
	Pre-Flag OMR Forms	x								x					Allows a district-level user to export the student information necessary to pre-flag OMR forms using a separate application.
	Schedule tests	x											x		Grants users the ability to schedule a test and assign it to the institution where the operation is given.
	Review item, passage, or rubric	x			x					x	x				Allows users to approve test content (items, passages, rubrics) submitted for approval to the public bank of their primary institution.
	View test content	x									x				Grants users the ability to view the questions and content of upcoming tests.
	View Restricted Content	x									x				Allows users to view the content of restricted assessments. This operation is required to select the option to restrict test content and to modify the test properties of a restricted assessment.

Roles and Permissions Documents

All documents referenced in this presentation can be found at:

<http://www.ncpublicschools.org/homebase/getting-ready/implementation/category?category=User%20Roles%20and%20Access>

What is New with Schoolnet Roles and Permissions?

- Access for School Library Media Coordinators (SLMC) and Instructional Technology Facilitators (ITF)
 - Added more specific scenarios
 - Scenario 1 – You have a **full** class schedule assigned to you in PowerSchool = **TEACHER**
 - Scenario 2 – You have at least 1 class scheduled in PS + you collaborate with other teachers school-wide = **TEACHER+**
 - Scenario 3 – You work at one or more schools within the district – but do NOT have a class schedule = **STAFF+**

CAUTION: For Scenarios 2 and 3 adding the “Access to Teacher Lesson Planner” role allows access to school-wide teacher and individual student data at the school(s) to which they are assigned.

What is New (cont.)?

- Teachers Creating Benchmark Assessments set up changed as of August 2014.
 - This is now a **TEMPORARY** access (give to teachers only for the amount of time the are creating benchmarks and then take away).

Please reference the new documentation at <http://www.ncpublicschools.org/docs/homebase/getting-ready/implementation/user-roles-access/new-teacher-creating-benchmarksv2.pdf>.

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What is New (cont.)?

- Access to Report Manager
 - Added fall 2014
 - This role is intended for a user who might be designated by the School or District to create and manage reports.
 - User with the default role of Leadership do NOT need this role, they already have the operations needed to manage reports.

Roles for Creating Benchmark Assessments

- Access to Benchmark Assessments Items is restricted to users at the District Level
 - District Level Leadership with Test Item Administrator
- OR**
- District Level Staff with Test Item Administrator and Access to Assessment Management

Reminders for Creating Benchmark Assessments

- Benchmark Assessments should be created with items under the publisher name NCDPI_Benchmark (or district created items that you have created and shared at the district level only)
- Benchmark Assessments should be created using “Create a Test Manually” (**Do Not** use “Create an Express Test” for district benchmark assessments)

Export and Import Roles

- Only District Level PowerSchool Administrators have access to export and import roles.
- Documentation for this process is available on the website at <http://www.ncpublicschools.org/homebase/getting-ready/implementation/category?category=User%20Roles%20and%20Access>

	A	B	C	D	E	F	G
1	id	first name	last name	schoolid	psaccess	canchang	schoolnetroles
2	5464	Daffy	Duck	123406	0		123406:Teacher;123406:Access to Teacher Lesson Planner;123406:Access for Teachers to Share Assessments
3	5737	Teddy	Tigger	123378	0		123406:Teacher;123406:Access to Teacher and Section Level Data;123406:Access to Aggregate Level Data;123406:Access to Assessment Manager
4	4964	Tina	Tigger	123406	0		123406:Teacher
5	3709	Mickey	Mouse	123406	1	123406	123406:Staff;123406:Access to Teacher Lesson Planner;123406:Access for Teachers to Share Assessments
6	3249	Minnie	Mouse	123406	1	123406	123406:Staff;123406:Access to Aggregate Level Data;123406:Access to Teacher Lesson Planner;123406:Access for Teachers to Share Assessments
7	5724	Donald	Duck	123406	1	123406	123406:Staff
8	5119	Donald	Duck	123406	1	123404;1	123404:Leadership;123404:Staff;123404:Access to Teacher and Section Level Data;123404:Access to Aggregate Level Data;123404:Access to Teac
9	5085	Daffy	Duck	123406	1	123406;1	123404:Leadership;123404:Staff;123404:Access to Teacher and Section Level Data;123404:Access to Aggregate Level Data;123404:Access to Teac
10	4183	Tina	Tigger	123396	0		123396:Teacher;123396:Access to Aggregate Level Data;123396:Access to Teacher Lesson Planner
11	3901	Mickey	Mouse	123396	0		123396:Teacher
12	5597	Daffy	Duck	123390	1	123390	123390:Staff;123390:Access to Teacher Lesson Planner;123390:Access for Teachers to Share Assessments
13	5555	Teddy	Tigger	123390	1	123390	123390:Staff;123390:Access to Teacher and Section Level Data;123390:Access to Aggregate Level Data;123390:Access to Teacher Lesson Planner;
14	5067	Tina	Tigger	123388	1	123388	123388:Teacher;123388:Leadership;123388:Staff;123388:Access to Teacher and Section Level Data;123388:Access to Assessment Management;1
15	4059	Donald	Duck	123388	1	123388	123388:Staff;123388:Access to Teacher and Section Level Data;123388:Access to Aggregate Level Data;123388:Access to Teacher Lesson Planner

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How to Edit the Export

1. Work with your district PowerSchool Data Administrator to export the Schoolnet roles list from PowerSchool.
2. Open the tab delimited text file.
3. For each existing staff member, enter the appropriate Schoolnet roles using the following format: schoolid:role;schoolid:role. Note that a colon separates schoolid and role and a semicolon separates each pair of schoolid and roles.
4. Save the export file as a tab-delimited text file.
5. Provide the edited file back to you district PowerSchool Data Administrator for import

Schoolnet Roles Setup in PowerSchool

- As a reminder, the *Schoolnet Role Definitions* in PowerSchool have been set at the State level – **DO NOT** make any changes to these definitions
 - Making changes to these role definitions at your district level will result in incorrect access for users in Schoolnet and will require roles to be re-assigned once they are corrected

Schoolnet Roles in PowerSchool

- Functions**
- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules
- Reports**
- System Reports
- ReportWorks
- People**
- Student Search
- Staff Search
- Parent Search
- Enroll New Student
- New Staff Entry
- New Parent Entry
- Setup**
- School System
- Personalize
- Applications**
- PowerLunch
- PowerScheduler
- PS Administrator
- PT Administrator

Schoolnet Roles

		New
Name	Description	Enabled
 Teacher	Schoolnet teacher equivalent role	✓
 Leadership	Schoolnet leadership equivalent role	✓
 Staff	Schoolnet staff equivalent role	✓
 Parent	The Parents of the students enrolled in your school or district.	✓
 Student	The students that are enrolled in your school or district.	✓
 Access to Teacher and Section Level Data	This role should be given with caution as it allows access to student level data including Program Enrollment, Standardized Test Data, and Demographic Information. If the user is a District Level User, they would have access to ALL student and teacher data across the district. If the user is a School Level User, they would only have access to ALL student and teacher data at their school.	✓
 Access to Aggregate Level Data	This role allows access to aggregate level data only – users cannot drill down to the student level. Consider this role for Assistant Principals. Operations included are view basic student information, view student contact information, view published reports, and create and edit reports.	✓
 Access to Assessment Management	This role is intended for District and School Test Coordinators. If this user is a District Level User, they would have access to tests created at the District level and can also see School Level Benchmarks. If the user is a School Level User, they would only have access to tests created at their school or tests that have been shared with their school by the District Test Coordinator. Operations aligned with this role allow these users to view test content, to create and edit test items, to schedule tests, modify tests, add or update student responses, pre-slug OMR forms, create test windows, generate student answer sheets, and review items, passages, or rubrics.	✓
 Access to Curriculum Management	This role is intended for users District and School Curriculum Coordinators. If the user is a District Level User, they would have access to Create, Edit and Schedule District level curriculum. If the user is a School Level User, they would have access to review Lesson Plans and Instructional Units that are created by teachers and staff and submitted to the school for materials approval to promote the material to a shared School or District Instructional Materials Resource Bank.	✓

Too Many Permissions

- Teachers and leadership generally do not need any additional roles
- Staff only need roles specific to their jobs
- Examples of giving too many permissions:
 - All users with Access to Curriculum Manager could create and schedule curriculum at their institution level
 - All users with Access to Report Manager could create and publish reports at their institution level
 - All users with Access to Approve Instructional Materials and Access to Approve Assessment Items could vet and approve resources and share at their institution level as well as submit resources to the level above them
- You want to be sure you intend for these users to have those capabilities

Caution: Be Careful



- Access To Teacher & Section Level Data
 - This allows users to review report data for **ALL** teachers and/or sections within their school or district.
 - Be sure the user needs this level of access prior to assigning this role.

Incorrect Permissions



Add Schoolnet Roles to

System Roles (choose ONLY 1)	<input checked="" type="checkbox"/> Teacher <input checked="" type="checkbox"/> Leadership <input checked="" type="checkbox"/> Staff
Additional Roles	<input checked="" type="checkbox"/> Parent <input checked="" type="checkbox"/> Student <input checked="" type="checkbox"/> Access to Teacher and Section Level Data <input checked="" type="checkbox"/> Access to Aggregate Level Data <input checked="" type="checkbox"/> Access to Assessment Management <input checked="" type="checkbox"/> Access to Curriculum Management <input checked="" type="checkbox"/> Access to Teacher Lesson Planner <input checked="" type="checkbox"/> Test Item Administrator <input checked="" type="checkbox"/> Access for Teachers to Share Assessments <input checked="" type="checkbox"/> Access to Report Manager <input checked="" type="checkbox"/> Access to Approve Instructional Materials <input checked="" type="checkbox"/> Access to Approve Assessment Items
<input type="checkbox"/> Apply these roles to all institutions the user may switch to (excluding LEA)	

Cancel **OK**

Not Enough Permissions

- Users without the right level of permissions will not be able to access operations they need
- Users with the default role of Staff will need additional roles added in order to do their jobs
- Example of Not enough permissions:
 - Leadership or Staff assigned with creating benchmark assessments do not have the additional role of Test Item Administrator so they are unable to access any assessment items to create assessments

Note: *Test Item Administrator* should **NOT** be assigned to teachers

Incorrect Permissions

Add Schoolnet Roles to

System Roles (choose ONLY 1)

- Teacher
- Leadership
- Staff

Additional Roles

- Parent
- Student
- Access to Teacher and Section Level Data
- Access to Aggregate Level Data
- Access to Assessment Management
- Access to Curriculum Management
- Access to Teacher Lesson Planner
- Test Item Administrator
- Access for Teachers to Share Assessments
- Access to Report Manager
- Access to Approve Instructional Materials
- Access to Approve Assessment Items

Apply these roles to all institutions the user may switch to (excluding LEA)

Cancel OK

Correct Permissions

Add Schoolnet Roles to

System Roles (choose ONLY 1)

- Teacher
- Leadership
- Staff

Additional Roles

- Parent
- Student
- Access to Teacher and Section Level Data
- Access to Aggregate Level Data
- Access to Assessment Management
- Access to Curriculum Management
- Access to Teacher Lesson Planner
- Test Item Administrator
- Access for Teachers to Share Assessments
- Access to Report Manager
- Access to Approve Instructional Materials
- Access to Approve Assessment Items

Apply these roles to all institutions the user may switch to (excluding LEA)

Cancel **OK**

Resources

- Information about roles and permissions is available on the Home Base website at <http://www.ncpublicschools.org/homebase/getting-ready/implementation/category?category=User%20Roles%20and%20Access>
- Archived webinars on Roles and Permissions are also available at <http://www.ncpublicschools.org/homebase/resources/videos/webinars/>

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Contact Us

- **home_base_ready@dpi.nc.gov**

If you have feedback on roles and permissions for Schoolnet or if you have a scenario that had not been addressed that will help you use Schoolnet, please let us know and we'll work on it.

- If you have questions or need help setting up roles and permissions for your LEA/school, please contact the Home Base Support Center at homebase.incidents@its.nc.gov.