

**The NCDPI
Schoolnet - User Management Roles & Permissions**

Dan: Dan Urbanski, Moderator
Siler: Kayla Siler, Presenter
Martin: Gerri Martin, Participant

Urbanski: Well, hi there. And hello again, everybody. This is Dan, your friendly webinar guy. I'd like to welcome you to our snow-day version of our regular Thursday webinar. We are going to be focusing today on the user management side of Schoolnet, how users can actually access the tool. And with me here today we have our own gifted and talented NCDPI policy analyst, Kayla Siler. Kayla, are you there?

Siler: I'm here. Can you hear me?

Urbanski: I can. I can. Welcome. How are things out in the tundra today?

Siler: Cold. [LAUGHS]

Urbanski: Uh-uh.

Siler: It's a slushy mess outside.

Urbanski: Oh, I'm so sorry to hear that. Well, we're recording this because we have a packed house right now. I can see looking at the list that there's a ton of people fighting just to get into this webinar. We're going to record this and make sure that those who could not have made it because of the snow and the slush can hear this. But you're going to talk to us today about user roles and management. Is that correct?

Siler: That's correct.

Urbanski: Well, you know what? I've never been a Shakespeare fan, and I don't even know what ado is, so without further ado, I would like to introduce to you, ladies and gentleman, to the incomparable Kayla Siler who will take us through the next session. Kayla.

Siler: Thank you very much, Dan. Good afternoon, everyone. My name is Kayla Siler, as Dan just said. And I am going to be going through our webinar today which is all about Schoolnet roles and permissions. Make sure I get things off my screen so we can get rolling. Here we go.

All right. So first a quick look at the agenda, the things that we're going to be covering today just to give you an idea. We do have a lot of information to pack into this hour, so be patient with me as we work through. But please feel free to stop at any point if you have questions. Use your chat or questions box in the go-to [ph] webinar, and type in any questions that you have. And Dan is going to help me monitor that. And we'll stop and pause if there are questions or things that we need to repeat and make sure folks understand before we move on. And then, of course, at the end we'll save some time for your questions there as well.

All right. So we'll start with just a general overview. Some quick reminders about things, how the roles and permissions are set up, some things you might need to know about PowerSchool and Schoolnet together. We'll look at some things that are new, some things that are different from the last time that we talked either via webinar or a conference, whenever you may have heard information on this before. Or if you're new to Schoolnet roles and permissions altogether then these things are definitely new to you.

We'll look at some things that are coming, some things on the horizon, where we're [ph] looking to go in the area of roles and permissions. We'll go through some reminders and just look at some examples and scenarios of what it looks like if you don't quite do this right, if you give too much or too little permissions when you're trying to set up your users. And then I'll give you some information that might be very helpful on an import/export process that can make this all easier. And then we'll close out with contact information and things to help you find the tools and resources you need in order to set up your roles and permissions.

You'll also notice I sent a URL through the chat box just a few moments ago. The link in that URL will take you to the roles and permissions website where we actually have all the documents and things that I'll be discussing today. The URL is included in this presentation, and you will have a copy of that. But I wanted to send it out to you now in case you wanted to follow along with any of the documentation on our website as we go through our discussion this afternoon. So let's get started.

All right. There are two key points that we like to make about roles and permissions. And you will hear this more than once today. You might even hear it more than twice. It's very important. It's something that we can't say enough. So I like to say it over and over. So the first time, here we go. Teachers have what they need. You do not need to give teachers additional roles or permissions for Schoolnet. There are special cases where you may want to do that, but in general a teacher can do everything that they need to do within their individual classroom

with just the teacher role; you do not need to adjust roles and permissions for a teacher.

The second key point is that every user should have one and only one default or system role for Schoolnet. There are three system roles, that is leadership, staff and teacher. And you should only have one per user. You should not give anyone more than one.

So I've been talking about this a lot lately. And I learned that some folks, when we got started, didn't quite know where they actually set up these roles and permissions in PowerSchool; so I just wanted to point that out really quickly before we move forward. When you are logged in to PowerSchool you can search for an individual staff member. Go to security settings, which will be on your left navigation. You'll see a screen similar to the one we have here. You'll want to go to the Applications tab. And then click on Manage Roles on the line that says Schoolnet Security. This is where you actually manage your user roles for individual staff members in Schoolnet. And, remember, this is all done in PowerSchool.

Here's what the screen will look like once you hit Manage Roles, at least something similar. You'll see the institutions available for that particular user. And under the actions column on the far right, you will have the option to add or edit roles as needed for that particular person at the various schools or locations in which they would need to have access. So I just wanted to start there in case you were very unfamiliar with how Schoolnet roles and permissions work. It is all done in PowerSchool under security settings for the Schoolnet application. And

this is what it looks like when you go to add and manage roles. And we'll look a little bit later at the actual screens when we get to them as well.

Okay, so what are the roles for Schoolnet? We just noted three of them. The default or the system roles, as they're called, that are in the system are leadership, staff or teacher. I believe you heard me say this before, but I think I'll say it one more time. Every user only needs one of these three. So be sure when you are selecting roles for a user that they only have one of the system or default roles.

Leadership basically has everything that they need. We've made sure that leadership has all the roles and permissions that they would need to have access to anything within their school or district. There are two things that are isolated that if the leadership person in your school or district needed to access assessment items or needed access to curriculum manager you would need to add two additional roles. But other than that, leadership really only needs leadership. It's similar to teacher; they have what they need; you don't really have much to add for a leader.

Staff, on the other hand always needs additional roles. The staff role is a very basic role, like a view or read-only role into Schoolnet. So for the majority of your staff at the school or district who would not be considered a leader or a teacher would be — would fall into the staff category. And you would need to add the roles appropriate to their particular roles in your school or district. And we'll go over what all those options are in just a moment.

And then the last one, of course, is teacher. And the teacher has everything necessary to conduct his or her individual classes, access to all the students that they teach, everything like that. You don't really need to add any additional roles for a teacher. We do have one special role that is for teachers. That's access for teachers to share assessments. And then there are special cases where a teacher may need additional rights or access based on their particular role within a school. But in general, basic teacher everything you need to do within a classroom you already have that. You are all set as a teacher. You do not need additional roles.

So what are the additional roles? Here is the complete list of all of the additional roles that we have in the system at this time. You will notice there's a trend other than the first one, test item administrator, which is a special role. And we'll talk about why it's so special in just a moment. Everything is an access to something. This is really for you, at the school or district, when you're trying to decide, "Okay, here's my staff. What do they need access to?" That's a question you're asking yourself. "Okay, this person is responsible for assessments. I think they need access to — " let's look down the list, "Oh, assessment management maybe." So you use that question, "What does this person need access to?" Look at the options, and then give them the access to whatever it is that they need in order to do their particular jobs.

You'll notice there's something different about the last one in the list. It says "access for." Access for teachers to share assessments is just that. It is an access specifically for teachers, and it allows them to create what are called shared assessments within the system. This is the only role on the — on this list

that is very specific to teachers. It is for teachers. No other user role would ever need to have this assigned to them. Staff and leadership can already view the shared assessment functionality that is given here to teachers. This role would never be needed to assign to a staff or a leadership person within your school or district. It is specific to the teacher role.

All right. So we know where to find the roles in Schoolnet — or in PowerSchool for Schoolnet. And we know what they are. Here's just a friendly reminder before we move forward. If you're familiar with the PowerSchool side of things in your school or district you will note that all of these definitions for Schoolnet are actually set up in PowerSchool. All of the roles and everything that you need, that's where you'll find them.

You might also notice that you have editing rights on this screen currently. So this is just my plea to please ask that you do not make any changes to these definitions, to any of the things that are set up on this screen, as making changes will really just result in more work for you. And none of us want that to happen. So just a reminder, when you come across this screen — here is an example on the page now. These are definitions and things that we have set at the state level. Just please don't edit or make changes.

We did come across an issue with a district recently that, whether they intended or not, they did remove something from this screen. It resulted in taking that role or permission away from all of their users. We helped them to add it back, but the system didn't know which users needed the role back, so then they had to go back and manually give it back to each of their users who's had that role

or permission before. So be very careful. Don't change anything on this screen, and we'll all be good to go.

All right, and before we move on I just thought I'd mention this one more time just to make sure you heard it, in case you weren't here right at the beginning or in case you fell asleep right quick, I don't know, ran out into the snow, teachers have what they need. Don't give them any additional roles within the system unless it's absolutely necessary, if they have some specific and special case where they might need an additional role. And then users should only have one of the default or system roles: leadership, staff, or teacher, not any combination of the three, just one per user, please.

Urbanski: Hey, Kayla?

Siler: Yes.

Urbanski: I just got back from out of the snow. I was wondering, do teachers have everything they need within their classrooms or do they need something different?

Siler: Dan, that is an excellent question. And I'm so glad you asked. [LAUGHTER]
Teachers have what they need.

Urbanski: Oh.

Siler: And we hear your [ph] question a lot. You might think. And, you know, the next couple of slides will actually help explain. It looks like sometimes that all of these things, access to create assessments or access to — a teacher needs this, right? And people get very excited. They want to give teachers everything that they need. So we just like to make sure, you know, teachers already have it. Schoolnet

was smart in that way. They built — they set it up so that the teacher really has everything.

Then what you have to make decisions about are these other people in the school or in the district, these other staff, these other folks who may work with multiple classrooms; they may work with only one classroom; they work across multiple schools. It's those extra, those other folks in your building who don't necessarily have courses assigned to them where you really have to make decisions about what kinds of roles, what kinds of operations, what things do you want them to do in the system, so.

Do we have any other questions at this time, or you think we're good to keep rolling?

Urbanski: We are good to keep rolling. Thank you so much.

Siler: All right. Well, let's dive into our tools and documents. So what we've been [ph] doing over the last year and a half or so is trying to get a better understanding of how this works, how LEAs [ph] are setting up their roles and permissions. And then we've taken questions and feedback from the field to say what are some special cases where you have this particular staff person and you're not quite sure, "Well, what should we do? They need to be able to do X, Y, Z in the system. How do we make that happen?"

So what we've done at the state level is create some scenario documents, some how-to guide, if you will, to tell you, "Here's what you could do," or, "Here's the options that you have for various staff at the school or district level that will help you with making decision on how to set up roles and permissions."

The first two things that we have — one is just a basic document that really has all the definitions of our roles for North Carolina. We've listed out, starting with the defaults, leadership, staff and teacher, and then all the additional roles. We let you know what is included in that role, maybe some recommendations for who you might want to assign this role to. And just the information about what you can do if you have that particular role. So that's just defined in the document. It also includes a few steps on how to actually edit roles within that document as well.

The second thing is a matrix, which is actually just a visual display of the definitions. We have the operations down one side; we have the roles across the top; and then you can clearly see an X in the box of every role that includes that particular operation. And we'll actually look into that in some detail in just a moment. And then, as I mentioned, we have the scenario documents. They walk you through some how-to's [ph].

For example, you have an instructional coach maybe at the school or district level. What roles would that person need? What access might you want to consider for that person in order to allow them to do their job and see everything that they need to see in Schoolnet? So that's just an example we have of the things like [ph] school library media coordinators, instructional technology facilitators, how teachers might create benchmarks, if you want that option. We just have several options there. And it just walks you through and gives recommendations for how you might want to set up your roles for those staff within your school or district.

So let's look at the matrix. The matrix is one of the pretty helpful things that we have out there. It's a great quick reference. You can get it down to one page if you really want and see everything in one place. But it's also a little bit confusing. So we like to go into a little bit of detail on that and give you the information about what is contained in the matrix.

So the rows going down are the operations. Operations is just a term for the things that you can do within Schoolnet. And here's a list of those operations. It might be a little small, but you'll be able to pull up the full matrix on the website that I provided earlier. You'll notice they're grouped into a couple of categories that look familiar, right? The categories are lined directly to the various modules that we have in Schoolnet.

So there are operations related to school and district data, classrooms and assessment admin. This is just another way to break it down and make it easier for you to make those decisions. So if you're trying to look at a staff person in your school or district responsible for reporting, you might want to go to school and district data first and make sure they have the operations related to reporting that they need. Same thing if you have a curriculum person, go to classrooms; an assessment person go to assessment admin. And make sure that they have what they need. Just a good way to group things. If you have a person who crosses over you'll be looking at all the categories, but it's just a first step, a way to group things so that people can understand how to make those decisions once they're getting started.

All right. So across — down the side [ph] we've got our operations.

Across the top we have all of our roles. We start with our three system default roles. This is the same set of system defaults we talked about earlier where you only need to choose one. Everyone just needs one default role. And an important note that I will say here, the reason why we say this and why we say it again and again is that if you give more than one system default you might confuse Schoolnet a little bit.

If you're both teacher and leader the system is not quite sure what to display for you. And it — often we find it defaults to the lowest level of roles and permissions. So you may think you've given someone additional power when in fact you've actually lowered their power to the lowest level assigned. So be very careful about that. Make sure you only assign one system or default role. Those are your first three across the top. Then we get into our additional roles. And I told you there were some very special ones here.

So the first special one is called test item administrator. This is that — no, it doesn't start with the Access 2 [ph]. This is actually very similar to a default role within the Schoolnet system. But it is additional that you have to add. And we find that anyone not a teacher — you'll note at the bottom of the screen this is not for teachers. Anyone at the leadership or staff level that is going to have any involvement with creating assessment items at the school or district must have this operation or must have this role added. That is very important.

In the beginning we made sure we had access to assessment management set up. We thought that would be everything that you need. But we learned that

even the system operator for the State of North Carolina cannot see all the items in the system if they do not have test item administrator added. It is a special case. Users need it. If they're working with assessment items make sure you add test item administrator. And, again, that's for staff and leadership only; teachers do not need this role. It is not for teachers.

We have another special one. It's not necessarily special so much as it is a little bit of a warning that we want to put out there when we talk about this role. This is school [ph] access to teacher and section level data. The reason we caution with this role is that if you give this role to any user, it will give them access to all teachers and all sections within the school or district. So they would have information. They would have access to school-wide information.

It's not a case where you can pick and choose, "I want access to these five teachers or maybe this PLC [ph] group; I want to give them all access to one another." It is the case in which if you give this role it's all teachers, all sections within the whole school and the whole district. So while that may be needed for some staff it's probably not needed for many. So we just want to put that caution out there and make sure you know it's not intended for teachers, as that would give them access to all other teachers' information within the school, and that's probably not something that you want to do. So just want to point that out.

Now really across the top of the matrix that's all the additional roles. Going down you'll notice — you can see in some of the screenshots here there are Xs in the rows and columns going down. That's to let you know which operations align. To give you a little bit of idea — I know it's small, but the full

matrix if you were to put it down into one screenshot here this is what it would look like. You can see that going down any of the rows for a particular role you can see — [BREAK IN AUDIO] — that particular role can do that particular thing. You'll note that going down leadership almost every single box has an X. That's because, as I mentioned, leadership has basically everything that they need. But then you'll also note that going down teacher there are not very many X's.

So I want to point that out right quick. Don't be alarmed. Don't think, "Oh, no. My teachers don't [ph] really have everything. I need to go give them a bunch of roles." The teacher role is very native to the system. It is set up exactly for what a teacher needs to do. What you see here are two additional roles that we have given — or two additional operations that we have given to the teacher that are a little bit beyond what the system gives to the basic teacher. So we gave two more things for North Carolina. That was for us. But everything else the teacher can do.

Like, you might see create test. Teacher can already do that even though there's no X in the box; it's built into the teacher role for the individual classroom. They've got it. Don't be alarmed when you see the spreadsheet. Teachers are good. They still have everything they need. You still don't need to go add additional roles and permissions for the teacher unless they're in a very special case where they might need something. And we'll talk about a few of those in just a second.

So where can you find this matrix and these documents that I have been talking about? The URL is on the screen now. I've also put it in the questions

box, so you should be able to see that and access it. It's off of the Home Base website if you — if you're familiar with that site. Left-hand navigation, there's something about getting ready and implementation. You just click on that, and you can get to the user roles and access page. You'll find the document with the definitions, the matrix, an overview presentation very similar to the one that we are going through right now, and then all of the scenario documents that are available to you at this time.

Please note we are looking to add more. We're always looking for new scenarios or new options from the field. We did just update everything for February 2015, and that went live as of Monday of this week. So if you haven't checked out the website in a while, I do recommend it. We've made some changes, tweaked some documents just a little bit make sure they're as accurate as possible. And we do have the matrix and the definitions all cleaned up [ph] to align with the system as it is currently in production today. All right.

So what's new or what's different in Schoolnet with roles and permissions? The first thing is actually a brand-new change actually. We went live on Monday, as I mentioned, with the left set [ph]. We have altered the access for school library media coordinators and instructional technology facilitators. Before we just had some general guidelines. What we've done now is actually break it out into three specific scenarios based on conversations with Kathy Parker at the department who works with school library media coordinators as well as some other staff within digital teaching and learning and some staff in the field who had some feedback on how to set up this role. So there are three options

or three scenarios included now. We understand this may not cover every scenario, so we're open to more suggestions, but we thought this is was a good start at trying to break that down and get folks a little more guidance.

One scenario is that if you are a school library media coordinator or an instructional tech facilitator and you actually have a full schedule of classes assigned to you in PowerSchool, you would already be a teacher in Schoolnet, you would have access to all of those classes, every one in your schedule. You're actually good to go. You don't really need anything additional. You'll be able to see all your kids, all the ones assigned to you. You'll be able to do tests with them, instructional materials with them. You'll be able to do the things that you need with all the classes that are assigned to you.

Scenario two is that you may have one or two classes assigned to you in PowerSchool. And then the remainder of your day is a flexible schedule where you rotate between the various classes within the school building. You may see them all; you may see some subset, but you would probably need to have the teacher role, which you would already have since you have a class assigned to you, and you would need to add some additional roles, some that we talked about from the list that would allow you to have greater access within the school. Now, this is only because you are not only a teacher of a small class but you are a teacher within other classes or you are collaborating with teachers all across the school as the school library person or the instructional tech person [ph]. And you'll want to open up your access so that you can access other teachers' section information like aggregate-level data for the school, teacher lesson planner,

something like that. So we've given some recommendations of what to add for this role.

And the third scenario would be similar to the second, except that you are staff, you don't have any direct courses or classes assigned to you in PowerSchool, and you may also work at more than one school within the same district. So you would be staff in Schoolnet. And then, of course, you would need additional roles [ph] because, as I mentioned, staff pretty much will always need additional roles. And you want to add things like aggregate-level data, assessment admin if you are working — access to assessment management if you're working with testing, lesson planner or curriculum management if you work with that side of things.

We will note, as a caution, for scenarios two and three adding access to teacher lesson planner does give you school-wide teacher and individual student data. So be very careful. Make sure you limit that access to just the user who actually needs it. While it gives you access to see other teachers' lesson plans and collaborate with them on that it does also give you the ability to drill down to individual student data. So be very careful; make sure the person actually needs it, and then assign that role as an additional role in scenario two and three as appropriate for your school or district.

And the last two things under what's new are not that new. They both came about in the fall of 2014. But because they're newish, I want to make sure folks know, in case you're unfamiliar with roles and permissions. We had established early — probably January or February of 2014, about a year ago —

maybe being earlier than that. We established a role to allow teachers to create district-level benchmarks.

In general, teachers don't have access to the secure benchmark items. But we learned from some small districts and charter schools that they wanted teachers to help out with this process. So we've updated and changed that document to reflect the temporary access. You give it to the teachers just for, let's say, this week they are going to create all the benchmarks for the next quarter; give them access this week; they get it all done. End of the week you take that access away.

They no longer have to go through the admin account that they had to use before. But this is considered a temporary access where you want to give it only when they need it and take it away when they do not. A new document is on the website. A brand new version published on Monday. So make sure you check that out if you do have this scenario where you have teachers who are actually helping create district-level benchmarks in your district.

And then report manager was a new role that we added in the fall of 2014. It is intended for a user who would be creating school or district-level reports and who would be able to publish and manage those, push them out to other users. Leadership users do not need this role. They already have all the operations needed for reports. This is more for isolating that individual staff person who may be responsible for this in your school or district.

And note that you also probably don't want to give everyone access to report manager. You want to make sure you only give it to the person who is

actually responsible for creating these reports, publishing them, and sharing them within your school or district. They can fill up the report bank if you give them too much access here and they're just creating reports all over the place. But we did want to make sure everyone had the opportunity to assign that role to a specific person, so we did create that so that you can assign someone to be the report manager in Schoolnet for your school or district or both.

And now a speak peak for you. So we've got a couple of things that are on the horizon that we've been working on. And they are rules and permissions related though not necessarily directly roles. The first thing is co-teachers in Schoolnet. We get this questions a lot, "What's the role for a co-teacher?" or, "I don't know what role to give my co-teacher. How do I set up my co-teacher?" Well, right now in Schoolnet there is no role. So that's the first thing, and it presents a problem. But what we've been doing is exploring our options here and seeing what we can do to give teachers the access that they need.

If you're familiar with the PowerSchool side, that is a role you can set up, co-teachers in PowerSchool. Unfortunately right now Schoolnet only allows one teacher to a course. So the primary teacher in PowerSchool always comes over as the teacher in Schoolnet. If you're a co-teacher, a secondary teacher in any way, you are not going to have access to that class in Schoolnet as of today. But I just wanted to let you know we're working on some solutions. We have made some good progress over the last two weeks, I would say. And so just stay tuned. Look for information to come out through the biweekly or through our listservs that gives you some information about how you can actually manage co-teachers.

I will tell you it's not going to be roles related thing. We don't have any role that we can give them, but we do have an access that allows them to get access to the sections that they actually need to work with and allows you at the school or district to approve that to make sure the right teachers are getting access to the right sections within your school building. So working out the details and testing that now. And we will let you know very soon how you can handle co-teachers in Schoolnet.

The second thing that's coming is co-authoring of assessments. You may notice now in our production environment you can co-author an assessment item. Coming in the next release is going to be the ability to actually co-author an entire assessment, a whole test. That is in our training environment, so if you're familiar with our training environment now you may have already seen this. But we will have it live in production with the next upgrade.

We note this with roles because it may actually take away the need for the role for teacher to share assessments. So we created that to give teachers the option to create a shared test that they could both see and work on together. The co-authoring folder may actually replace that. So just wanted to point it out. It's something that's coming. We're going to continue some testing on it in our training environment, make sure we work out all the kinks and know exactly how it's going to function, and then we'll have that documentation ready for you when we upgrade.

And if it does indeed replace that role, we may no longer have that as an additional role. But for now we'll keep things as they are. Stay tuned. More

information to come on co-teachers and co-authoring. So those are our next big things. All right. A few more things to cover and then we'll stop for some more questions.

In my roles with the department, I also work very closely with the Schoolnet assessment components. So I'd like to do a little plug here for things related to assessment items that are also connected to roles. So just bear with me for a minute. There are particular roles that you need for creating benchmark assessments. The main one is test item administrator. And, as I mentioned, anyone who is working with assessment items, and needs to be able to view and search and create their own, must have test item administrator; not a teacher of course, but any staff or leadership involved in this.

So if you are staff or leadership at the district level creating a benchmark assessment, leadership just needs to add test item administrator. They already have everything else that they need. If you are staff, you would add both test item administrator and access to assessment management; you must have both in order to create and work with the tests at the district level.

And just as a quick reminder, if you are creating benchmark assessments you do have a set of items published from the state level that are secure at the district level. You can find them under the publisher NCDPI_Benchmark or the benchmark category if you're in items central [ph]. And then you should always create a benchmark assessment using the Create a Test manually, not an Express Test. Express Test will pull from all of the publishers, including those that are for classroom use. We want to make sure you filter and only get this — your

benchmarks, so make sure you go through the process to create your tests manually for benchmark assessments.

Urbanski: Hey, Kayla?

Siler: Yes.

Urbanski: We did have — I wanted to share an interesting conversation we had yesterday over at the Home Base symposium.

Siler: Okay.

Urbanski: There were several people that said, “Oh, my gosh. That’s so interesting. I gave my teachers access to test item administrator [ph] and the ability to create benchmarks,” like you’ve discussed.

Siler: Mm-hmm.

Urbanski: “And I forgot to take it away.” And we had a real interesting discussion because there were some — some leadership folks that found their teachers were creating express tests, and they were wondering why some of the benchmark items were actually being published onto their express tests.

Siler: Mm-hmm.

Urbanski: And it’s because they did not take away the permissions that you were discussing previously —

Siler: Yes.

Urbanski: — for the temporary scenario. So that’s just a key point for those listening on the line. If you are going to have a teacher elevated to the role or a staff person — well, actually it wouldn’t be a staff — but a teacher elevated to the role of creating benchmarks and you do not want them to have that permission any

longer, be aware because when the express test is created it just randomly grabs what items you have asked for; say, for instance, on a given standard, but it does not delineate between classroom items and benchmark items. You could literally be showing benchmark items on an express test, which might not be what you want to be doing in your classrooms.

Siler: Right. That is a good point, Dan. And I'll — just to clarify for folks who are listening. If the teacher is just the basic teacher role with nothing added then they do not have access to benchmark items. So they're good. Any test that they are creating they can only pull down items that they actually have access to. It is of situations where you've given the teacher additional access where they might be able to see both types of items, where then if you didn't take that away they could then start creating their classroom tests and include benchmark items by accident.

Urbanski: Right. Right.

Siler: Yep.

Urbanski: Just thought I'd —

Siler: And the same — I'm sorry. What was that?

Urbanski: Just thought I'd add.

Siler: Well, thank you. I appreciate that. And the same goes for the district level. Just — the district level always has access to all of their items and all of the items below. So that's why we point out that we have the special publisher and the filters in place to just get down to the benchmark items. And we just like to remind folks that that's important if you want to make sure you're using those items that are secure to your district level.

All right. Let's look at what happens when you set all this up if you've done something wrong. Or really we're getting at why is this all so important; why do we talk about roles and permissions so much? The main thing, of course, is related to security. Right? You don't want just anyone in the school building to have access to all sorts of data and information about your teachers and your students. So you want to make sure you make good decisions about what roles you give to those who are responsible for different tasks within your school or district. But what happens if you do give too many permissions? Let's take a look.

So we've said this a few times, I think, but teachers and leadership generally have what they need. There are two roles specific to leadership that you would want to add if they need them. You don't have to; these are just if they need them. There are only two additional roles that they would ever need. That's the test item administrator and the curriculum manager role. And then for teachers there is one that is for them, of course, the access for teacher to share. And then as we mentioned, if you've given them a special case like with additional access as the instructional tech facilitator or with additional access to create benchmarks you may give them additional roles. And that may be temporary, so you'll want to give them and take them away. But they really have what they need. So if you give teachers and [ph] leadership lots of other roles then you've probability given them too much.

Staff on the other hand needs roles, so you want to give them what's specific to their jobs. But let's think about that for a minute. Who would we want

to give certain things to? So if we're going through our staff any user that you give access to curriculum manager would be able to create and schedule curriculum at their entire school or district. So you might not want to give that to everybody. You might not want everyone in the school building just creating curriculum, publishing them on folks' calendars and lessons plans. You probably want just a few select staff who are in charge of that.

So make sure you go through their roles and you actually give only what is needed for that individual person's responsibilities. Same thing with report manager. If you give that to too many users you've got a lot of folks who are creating and publishing reports; your report banks are getting full; you're not sure where they came from; they may not be following the naming conventions for your school or district. You want to make sure that that role is given to just the person or small group of people who are actually responsible for that.

So that's the thing really. When you're going through your permissions to make sure you haven't given to much really look at the matrix, look at the document, figure out exactly what this person needs to do and assign them only what they need in order to do their role.

So we have an example here of what it might look like if you have given too many permissions. Oh, wait. Before the example here is our caution about the teacher and section-level data again. This is often one of those "I've done too much. I've given too many permissions." Because, as a reminder, giving this role does give you access to all teachers and all sections within the school. A lot of folks thought maybe their teachers might need this or that it sounds like

something the teacher needs, “They need their teacher and sections data.” No, the teacher already has what they need for their individual classes. Do not give this to teacher because if you do they would have access for the whole school or the whole district to all teachers. So be careful. Don’t just give this one out. That would be giving too many permissions.

And here’s that example screen. Now, you might think it’s a little bit crazy. And I did make this one up specifically for this presentation today, but it’s not the first time I’ve seen it. We actually saw this live from an LEA [ph] that had some questions and concerns about roles and permissions. And they said, “Well, I didn’t know what to do, so I just gave them everything.” That’s a problem. So we just want to point out that this is the incorrect way to set up your permissions. You’ll note that more than one system role has been checked, so that’s your first thing that’s gone wrong. This person is staff, leadership, teacher, parent, they’re a student; they’re everything. They don’t need to be everything. So what you’ll want to do is actually go through, only check the boxes of the things that apply.

The screen that you’re looking here — from the beginning I told you when you go into PowerSchool and you get to the manage security and you find the staff person — this is that individual screen you’re — where you would actually check the box to give them roles. So this is what it looks like if you haven’t seen it before. And this is the wrong way to do it, of course. You would not want to have every single box on the screen checked. That would never be the right way to set up your roles and permissions. That is giving too much.

Then the flipside of that is, of course, not giving enough, not giving the user enough information or enough operations in order for them to be able to do their job. So that's why, again, you need to go through that list. Be very careful, and make sure you're figuring out what the person needs. Teacher and leadership, they basically have what they need. You don't really have to worry about them not having enough. The general thing is that people give them too much because they actually already have what they need; you don't really need to give them more.

But for staff we often run into the problem of not giving a user enough because you're not quite sure or you don't know exactly what things might need to be paired together. So an example would be that you have staff; you want them to do your benchmark assessments; you look down the list. You think, "Oh, access to assessment management. That's got it covered. We're good." But you'll remember test item administrator is a special one. They actually need both. So they need two in order to do everything they need to do for assessments. So not giving them both of those roles would prevent them from being able to do their job. And as a reminder that test item administrator role is not for teachers, so don't assign it to teachers.

So incorrect would be if you just have staff checked. No additional roles — staff user could basically do nothing within Schoolnet. You would actually want them to have something checked in the additional roles column that would actually give them access to what they need to do within the system. But in most

cases we're talking one or two things here. And you figure out what does this person do, and you only check the box that would allow them to do that thing.

Now, in some districts, folks wear many hats. We got that, so we know they may do curriculum management and assessment management. And that's okay. Just make sure you do limit it to what that person needs. Don't just go down the list and check everything. It's going to be a very rare person who would need every single thing checked here. And if they did then they probably should have been the leadership role to begin with because they would actually already have that access. So just something to be careful as you go through.

The correct way for the example I gave, of course, would be to have staff checked, only one at the top. And then this person is your assessment manager or your assessment coordinator. They need access to assessment management and test item administrator. This would be the correct role to — the correct way to set up their roles, and they would have what they need to do in Schoolnet for assessments. All right. So we've got about 15 minutes left, and there's really only one thing left to go over, and then we'll address any questions or go back over information. But the last thing is pretty important.

So we've talked about where you do the setup for roles, where it all comes from from PowerSchool, what you need for Schoolnet, how we have it defined, all the documents. What does it mean to give too much and too little and how do we want to manage that. So some of you may be thinking, "Okay, so how do I change the roles for every single person in my school or district? How do I get

this right? That's a lot of people to have to go in and manually check all those boxes."

So the good news is you don't have to manually go in and check all those boxes. You can actually export your list of staff out of PowerSchool that has all of their Schoolnet roles. You can make changes right there in the Excel spreadsheet and import that file back in and change everyone at once without having to manually go through and check all the boxes. So just wanted to make sure you know that and that it is an option. We do have it documented for you on the website as is listed here.

The important thing to note is that only your district-level PowerSchool administrator has this access. So if that is not you make sure you find that person, become their pal for a day, make sure you work with them, export the data that you need, make the corrections, and then put it back in. I do have a sample of what that file looks like here on the screen. It is scrubbed data. We're not showing anyone's actual roles assignment information. This is Mickey and Donald and Tigger and such characters, so. But it's just — gives you an idea of what it looks like.

You're going to have first name, last name, school ID and some access codes for the system. But really what you are going to do when you make changes is really just look at column G, Schoolnet roles. Going down that column you want to go person by person, or if you know exactly which ones you're looking for to change, whatever that is, you would want to go through this list, find the ones that need to be edited and make those changes. Just looking at this example

you can see right off there's a couple of folks who only have staff with no other roles assigned. That one probably needs to be fixed. There's a couple who have teacher with multiple other things assigned. Those probably need to be fixed as well.

So what we'd like to recommend is that just as a best practice maybe at the beginning of every year once end-of-year processing is over for the previous year, it's July, you're about ready to kick off a new school year, it's a good idea — do this export, check all of your users for Schoolnet roles, make all of your corrections, load it back in all at once. You're ready to go for the new school year. Everybody has what they need.

Of course, throughout the year if you need to make someone a — changes or corrections for people — that's going to come up for sure. But it's a good idea at least once or twice a year, make sure you go through your whole list, all of your staff, make all of your corrections and get that imported in so that they will all be correctly set up to access what they need in Schoolnet. It's a good check and a good best practice to have to make sure you're monitoring that and keeping an eye on the way your roles and permissions are set up to make sure folks can do what they need to do.

And just quickly there — it's a pretty simple process, this import/export. So I have the five basic steps on the screen. The document on the website does go into more detail and has screenshots. So you'll want to reference that. But really it's this — get with your data manager, get that export. It's a tab delimited text

file. So open it up. Go through column G. Look at all of your staff. See what they need.

There is a very specific format that goes in column G, so make sure you pay attention to that. It is school ID, colon and the name of the role. So school ID, colon, teacher, for example. Semicolon separates each role. So if they have staff plus test item admin, plus access to test assessment manager they would have three. They would have the school ID, colon, staff, school ID, colon, test item admin, school ID, colon, assessment — access to assessment management. And each of those would be separated by a semicolon. Make sure you don't put extra spaces. It's all together in one string, but you do have to separate them, school ID and the role with a colon, each role with a semicolon. If you don't have that, you will get an error when you try to import the file. But it'll tell you what the error is, and you'll be able to find it and fix it.

So make all your changes, save the file back as a tab delimited text file. Make sure it's in that format. Get back with your PowerSchool data administrator or your [ph] school manager and do that import back into PowerSchool. Your Schoolnet roles are all set. So pretty easy. Definitely easier than manually looking up every single staff person that you have or every single teacher or every single person in your school or district and making that change.

So just want to make sure that you are aware, everything that you learn today you can make all of those changes in one place in that tab delimited text file. Export it out of PowerSchool, put it right back in, and you've got all of your Schoolnet roles and permissions set for the next year.

Urbanski: And, Kayla, if I can tie on just real briefly.

Siler: Mm-hmm.

Urbanski: I had a data manager from a very small district. She — I can't remember exactly. I think it was like "Charlotta Mecklenburge."

Siler: [LAUGHS] Oh, yeah? That small district?

Urbanski: Yes. And she — when we got to this point at the Home Base symposium she was saying, "Wow, it takes me about three days for the system to process because our file is 9,000 teachers large. Plus — "

Siler: Oh, wow.

Urbanski: " — additional thousands of educators and staff at the district central office level." And so she was wondering — every time she exports and imports back in she thought it was actually very — a quick three-day turnaround time. And I told her — and please correct me if I'm wrong in this suggestion — that she was only playing with approximately 10% of her 9,000-member database. And my suggestion was, "Please don't put the rest of those 8,500 people back into the system if you are just changing — "

Siler: Are you still there?

Urbanski: Can you hear me? I'm sorry.

Siler: Oh, yeah. You cut out for a second.

Urbanski: Oh, okay. My suggestion was if she's ported [ph] out that entire document and she's only editing 10% of the document, just port back in the 10% you've changed. Is that a — that is a correct statement. Is it not?

Siler: Yes. It is. If you — any row that you don't actually change, you know, obviously it's not going to make any change in the system. So you can — if you're not making any change you could always delete that row and only import back in the rows that you actually changed.

Urbanski: Okay. And she thanked me profusely because she had to dedicate one entire laptop just to do this and let it go for several days —

Siler: Oh, no.

Urbanski: — on a machine. And I said, "No, I believe, and I'm going to correct — you know clarify." But that was my understanding of the system. So she was walking away. And I just want our listeners here to understand and those who will be listening to this, as it's being recorded, that you do not have to port back the entire document, just the ones you've changed if you are miss — making changes.

Siler: Right. It's got the teacher's ID and name and information in there to know which ones to change. So if it's not in the file it's just not going to make any change. So you can make sure you import back in only the things that you changed. That might help if you do have a large file to work with.

Urbanski: See, I took good notes during your sessions. I swear.

Siler: You did a great job. Thanks, Dan. All right. Well, I can't read my screen. Here we go. All right, so that's our basic information for today then. The last things really to point out are where can you find all the resources that we have on roles and permissions, where can you get more information. So, obviously, the Home Base website is the key. We do have a user roles and access page. It has all the documents that we've talked about. It has a presentation similar to this one that

you can go through, use as needed. That one we actually change and update as things change. So the version you see out there today may be replaced with the version I've used for this session. But we will keep that one updated. And also the documents. We add to, change, make adjustments, and we try to get those out there and note where there are changes.

We also have some archived webinars on roles and permissions. So the ones that we have done prior to today. Today is also being recorded and saved for you. But you can get to those through the Home Base website as well along with other information related to Schoolnet. But we'd just like to point out that's a great place, a great resource for users in your school or district who may need to know more information. If you have turnover or change and you, you know, want to point folks to those just to learn more about it, feel free. And then always, the current one will obviously have the most recent information, but the basics are the same.

All right. And then I have two email addresses for you here. The first one is home_base_ready@dpi.nc.gov. This is really for feedback. It's — you don't necessarily want to send questions or problems here. That's not the place. But if you've seen something in the presentation today or if you have a special case that you don't think we've quite addressed with our roles and permissions scenarios and you think it might apply to others or you'd like to explore that with us, please let us know.

This is where we are really collecting feedback to try to figure out, "Okay, what have we not thought of yet, or what situation hasn't come up?" It might be

something new that we want to address, and then we want to document that and put it out there for other users across the state to benefit from. So if you have something that you think, “Well, I have this one staff person. They’re in this role. I don’t quite know what to do. I want to give them this much information, but I don’t want to give them this,” and you — you’ve tried but you don’t think you’ve got it quite figured out. Let us know.

We’ll be happy to work through that with you, let you help us test it out. We’ll document that, and we’ll add it to the website. Others will benefit from that. And always, if things change with new releases of Schoolnet or anything like that we would let you know the new operations when things are available. But we do have folks who monitor that email. So if you have any feedback or suggestions related to roles and permissions that is your place to direct that information.

And then we get to the — if you have — if you need help or you have questions about, “How do I do something?” or, “This isn’t working,” or anything like that. If you have questions and need help please reach out to our Home Base support center. They are very familiar with this information that you’ve heard today on roles and permissions. We work with them constantly and keep them up to date on this as well.

They knew who to contact if they can’t quite figure something out, and they know how to help you walk through the process, the import and export, the how to set up roles individually. So please work through your student information system or your instructional permit system contacts and report any questions,

concerns, or problems that you are having to the Home Base support center. The email address is, of course, homebase.incidents@its.nc.gov.

So make sure you reach out to them if you have questions or you actually need help. The first one, the `home_base_ready` — [BREAK IN AUDIO] — what you need. The other one is — when you need help, then we will get you that through the support center.

So, I think that covers all of the information that we have for today. So let's stop now and see if we have any questions or if there is anything we need to go back and address before we close out for this afternoon.

Urbanski: Wonderful. Thank you so much, Kayla. Yes, actually we do have one question for a clarification.

Siler: Okay.

Urbanski: If you could scroll back through your presentation right before — I can't remember the exact slide number, but right before the export/import roles. We did have a question. I believe it's — ooh, I believe it's this one here. We had Gerri Martin [ph]. Hello, Jerry. I am going to un-mute Gerri —

Siler: Okay.

Urbanski: — for a moment here to let her speak. Because there's a box at the very end that she was curious about, where it says, "Apply these roles to all institutions the user may switch to excluding the LEA."

Siler: Right.

Urbanski: She was wondering this — are you sure we want to check that? What's the danger? What's the benefit? And so maybe you can explain that a little bit more.

Siler: Okay. Yeah, I'd be happy to. So at the bottom you do have this box that says, "Apply these roles to all institutions the user may switch to." This is there. And you would want to definitely use it with caution. I think Gerri is on the right track. Let's say you have an — one of the examples that we've used already, a school library media coordinator or an instructional technology facilitator who works at more than one school in the LEA. They need the same rights at all the schools where they work. So what you would do for that person is they would be staff. You would check the appropriate boxes. They would probably need something like access to aggregate data, access to lesson planner. Check those boxes, and then you would want to check "apply this to all institutions the user may switch to," because that particular user is assigned to two or three schools and they need the same roles at each of the schools. So that is really intended for district-level staff who are at multiple schools within the district but who are not necessarily at all schools in the district.

Urbanski: Okay. So —

Siler: Does that help?

Urbanski: Yeah, I believe it does. Gerri, have we un-muted you?

Martin: Yes, you did. Thank you. I was misreading that somewhat to suggest that it applied to outside of your one LEA where you're working.

Siler: No, it would not. It would only apply within a district, and it would be — it's basically for that case where you're assigned to multiple schools but not every single school, so.

Martin: Thank you.

Siler: You're welcome.

Urbanski: Excellent. Excellent. Yeah, I believe if that person was working in a situation within [ph] multiple LEAs, it would then be up to the second LEA to decide what roles that person should have in their institution.

Siler: Right. Across LEAs starts to get complicated.

Urbanski: Yeah. And I'm sure we are going to see those as we progress together with this deployment of Schoolnet because I'm sure that can be. And it probably is being thought of people right now — or by people right now.

Siler: Right.

Urbanski: Excellent. Okay. Gerri, thank you so much for that question. And Kayla, that is it for our questions on — on this side here.

Siler: All right. And I think we are right at 4:30, so we can stay on for a minute if necessary. Let me make sure — I think that was the last slide. Let's go back to the end. Yep. That was it. Just a reminder to check things on the Home Base website. That's where we keep our latest and greatest information. And if you are not receiving the Biweekly Update that comes out that's also published on Home Base, you'll want to make sure you get access to that, a great source of information.

And, as I said, the things that are coming, the next step sort of things, co-teachers and co-authoring of assessments, we'll be making those announcements through our various listservs and then the biweekly and posting things on the website. So stay tuned for more information. Thank you for your time today.

Urbanski: Excellent. Thank you. Thank you. And so the last slide that we do have on the screen now — I actually wrestled back the control of the meeting here today. And so you'll see that there's a survey plea. And I've also posted this link into the chat box. So if you could take a moment, for those of you there [ph] on the line, and share with us some feedback on what you thought about today's webinar. I will caution that, yes, we were both remote because nobody was able to get into DPI today, from my understanding. So, but we are looking for the content and the information that was shared with you today and what your thoughts are. So please take a moment, two or three questions. It's going to ask you how we did and areas that we can possibly improve. And we love that feedback. So take that, copy it, click on the chat box link, and take a few moments to share so we can do this in the future at the same or greater level of professionalism and importance to you. Otherwise, Kayla, hey, great job. I appreciate your time. I think you did an excellent job.

Siler: Thank you.

Urbanski: And I'm looking forward to hearing you do this again and again and again.

Siler: Oh, yeah. We've got it coming up at CCSA [ph]. We'll talk roles and permissions there. I believe we've scheduled another webinar for the spring. So roles and permissions are important. Some people might think maybe it's overkill, but it is really important. When you're taking about teacher or student-level data and information you do want to make sure you do this right. And we want to protect our students. We want to protect our teachers. And we also want our users to be able to do what they need to do. We want them to get their jobs done. So roles and

permissions, always an important topic, and I'm always happy to share what I know and try to help you out, so.

Urbanski: On behalf of all the folks that are listening out in our audience today I thank you so much for your time, Kayla. This is a very important message to share with everybody, and I'm glad you were able to share it with us today.

Siler: No problem.

Urbanski: All right. Well, ladies and gentleman —

[END RECORDING]