

District Administrator Guide

Primary Audience: District Administrators

Purpose of Document: This guide outlines administrative rights overview of and assigning to

Administrator Type/Rights Guide

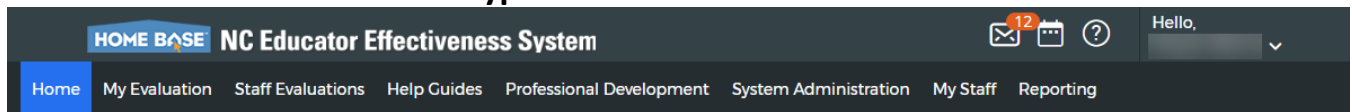
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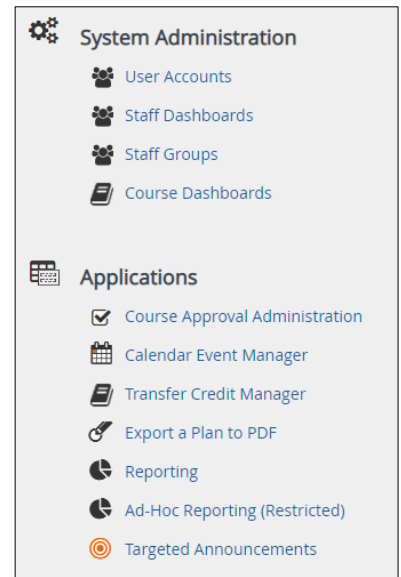
Overview of System Administrator Rights

NCEES utilizes three primary roles or **Admin Types** with specific **Access Rights** associated. The assignment of these rights determines what functions a user can access and staff they can edit/view. These **Admin Types** include:

1. District Administrator Admin Type:

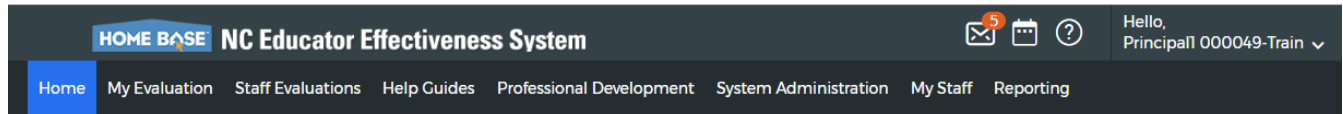


- Access to 8 tabs: **Home, My Evaluations, Staff Evaluations, Help Guides, Professional Development, System Administration, My Staff, and Reporting**
- Ability to see all plan and user data at their entire district and new in SY2018-2019 **Assume Identity** of users below District Admin type
- Ability to edit **My Staff > PDP Type** and the evaluation **Teacher Plan Type** for any user in the district
- Ability to assign Plan Administrator **Access Rights (Evaluator, Observer, Peer Observer, PDP Mentor, Contributor, View Only, Re-Open)** to anyone in the district and/or edit rights assigned by a Site Administrator
- District administrators will have the ability to **Unlock** and **Re-Open** a step that has been **Marked Complete**; i.e. to make it editable again
- Ability to assign and edit **Admin Types**: can make other users **District Administrator** or **Site Administrator**
- Ability to search **User Accounts** and **Staff and Course Dashboards**
- Ability to create and manage **Staff Groups**
- Ability to manage a **Calendar Event** or **Targeted Announcement** for the entire district or any school in the district

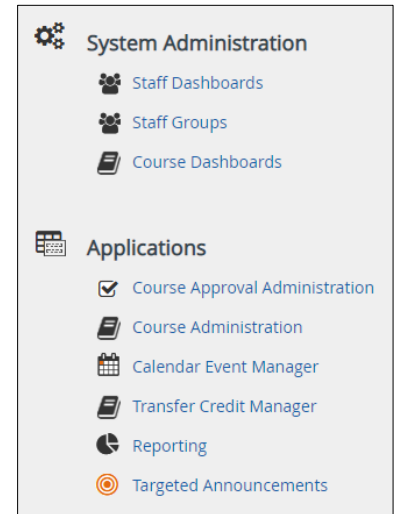


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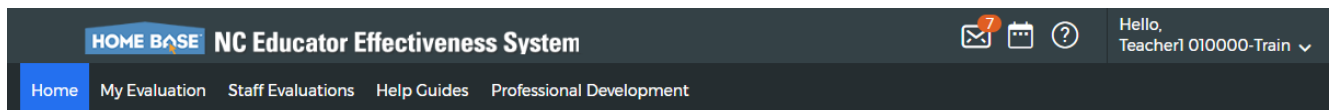
2. Site Administrator:



- Access to 8 tabs: **Home, My Evaluation, Staff Evaluations, Help Guides, Professional Development, System Administration, My Staff, and Reporting**
- Ability to see all plan and user data at their site (school)
- Site Administrators with a role of Principal are automatically assigned **Evaluator Access Rights** to all teacher/support staff and principal plans in their site (school)
- Ability to edit the **My Staff > PDP Type** and the evaluation **Teacher Plan Type** for any user in their site (school)
- Ability to assign Plan Administrator **Access Rights (Evaluator, Observer, Peer Observer, PDP Mentor, Re-Open and View Only)** to Teachers/Support Staff and Assistant Principals in their site (school)
- Ability to manage a **Calendar Event** or **Targeted Announcement** for their site (school)



3. User:



- Access to 4 tabs: **Home, My Evaluation, Help Guides, Professional Development**
- Access to a 5th tab: **Staff Evaluations**, however will not see any staff evaluations
 - Unless they have been assigned **Access Rights** by a Site Administrator or District Administrator, then will see Staff Evaluations
- Ability to see their own assigned plan(s) and user data

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Assigning District Administrator Admin Type

District Administrators and State (NCDPI) Administrators have the authority to assign **District Administrator Admin Type**. If there isn't a District Administrator assigned for a specific district, the Human Resources Director should contact the state's Home Base Remedy Support Desk to request assignment. Be prepared to share the user name and location data. District level District Administrators may then assign/edit district administrator admin types within their district by following these steps:

1. Assign or Edit District Administrator Admin Type

The screenshot shows the 'NC Educator Effectiveness System' interface. The 'My Staff' tab is highlighted in the top navigation bar. Below it, the 'Staff Management' tab is selected. The 'Staff Details - Training School 1' section shows a table of staff members. The first staff member, 'Principal1 000049-Train', has a dropdown arrow next to their name. A red box highlights this dropdown menu, and an arrow points to it from the 'My Staff' tab. The dropdown menu shows options: 'User Profile', 'Edit', and 'Admin Rights'.

- Click on **My Staff**
- From **Staff Management** tab locate **User**
- Click on the drop down arrow next to the user name that will be assigned **Admin Type** of **District Administrator**
- Click **Edit** button to open **New User Details** (profile)
- Click on the **Admin Type** drop down and select **District Administrator**
- Click **Save**

Save

Admin Type: User District Administrator Site Administrator User

Current Schools: 1

- Click on the **Admin Rights** button that appears in the **User Details** (profile) window

View/Set Locations Set Locations

Admin Rights Admin Rights

New User Details

Username: 000049.Principal1
 First Name: Principal1
 Last Name: 000049-Train
 Account Status: Active
 Employee ID: 10000000491
 Primary Email Address: 000049.Principal1@NCTrainingSchool.gov
 Home Phone:
 Current Staff Position: Administrative
 Demographics: Administrative Principal Role
 License Expiration:
 Admin Type: Site Administrator
 Current Schools: Pine Lake Preparatory-Train, 000049-Train Training District, Training School 1
 PDP Type: -Not Selected-
 Teacher Plan Type: Principal or AP
 ASW Type: Not Applicable
 Change Password: Change Password
 View/Set Demographics: Set Demographics
 View/Set Locations: Set Locations
 Admin Rights: Admin Rights

* Required

Edit

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- h. Use the drop downs to select the **District Name**

- i. Click **Add** to populate **Current Admin Rights Locations**

- i. Assigning locations is limited to setter's location assignment

- j. To **Delete** a location, click the **Trash Can icon**

- k. Click **Done** when finished adding **Admin Rights Locations**

- l. Click the **X** to close the **New User Detail** (profile) window

- m. The user now has **District Administrator Rights** and will be granted access to the **System Administration, My Staff** and **Reporting** tabs

- i. Full rights will be functional after overnight processing

Who Receives District Administrator Rights

To maintain a high level of control regarding who can effect meaningful changes to NCEES, only a very small number, in many cases only one or two, district staff should be provided formal 'District Administrator' rights in NCEES. These users are responsible for administering the tool, troubleshooting issues, reversing actions, working with NCDPI on system management and directly supporting district leadership with district level reporting and/or system management.

There may be other district staff who will benefit from having **View Only Access Rights** to a district or various schools. There is a difference between the system **Admin Type** of **District Administrator** and a local position title of District Administrator - i.e. all administrators in the district do NOT need to be the **Admin Type** of **District Administrator**. The option of **Assigning View Only Access** Rights to view all or a select group of staff/staff plans gives the needed level of data access and limits **District Administrator Admin Type** that can change access rights and edit plans.

To assign '**View Only Access**' please refer to the NCEES system Help Guides tab for Assigning Access Rights documents.

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Assigning Site Administrator Rights

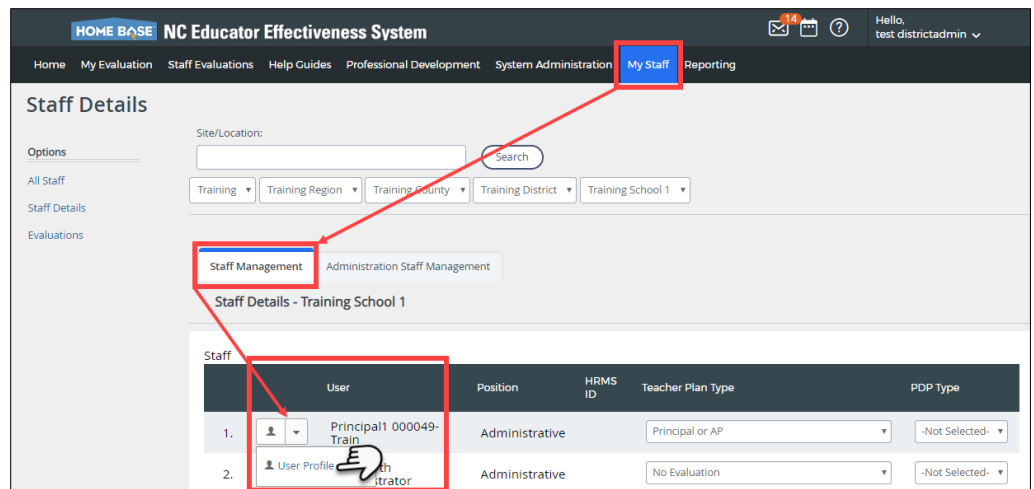
Principals automatically receive **Site Administrator Admin Type** with associated **Access Rights**. Assistant Principals automatically receive **User Admin Type** with limited **Access Rights**.

It is possible that school Principals will request to assign their Assistant Principals **Site Administrator Admin Type Access Rights** therefore allowing them to conduct tasks of the school principal including conducting and signing off on summary evaluations. Districts are encouraged to make clear the roles and responsibilities of school-based administrators in conjunction with this taking this action.

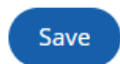
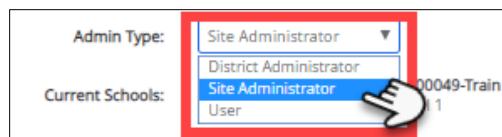
Staff assigned as a **District Administrator Admin Type** have the authority and ability to edit **User Admin Types** to assign **Site Administrator Admin Types** in NCEES by following these steps:

1. Assign or Edit Site Administrator Admin Type

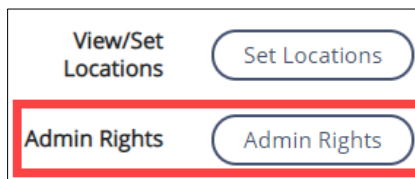
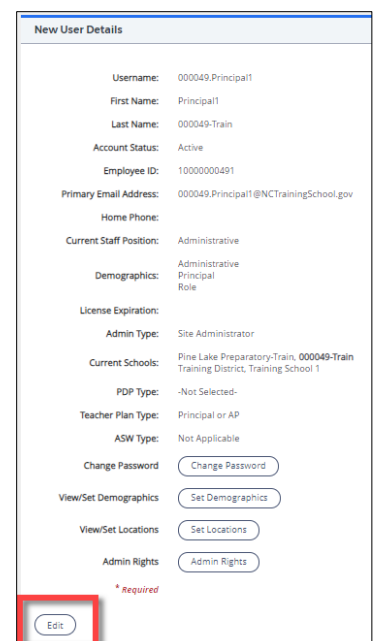
- Click on **My Staff**
- From **Staff Management** tab locate **User**
- Click on the drop down arrow next to the user name that will be assigned **Admin Type of Site Administrator**



- Click **Edit** button to open **New User Details** (profile)
- Click on the **Admin Type** drop down and select **Site Administrator**
- Click **Save**

- Click on the **Admin Rights** button that appears in the **User Details** (profile) window

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- h. Use the drop downs to select the **School Name**

- i. Click **Add** to populate **Current Admin Rights Locations**
- i. Assigning locations is limited to setter's location assignment

- j. To **Delete** a location, click the **Trash Can icon**
- k. Click **Done** when finished adding **Admin Rights Locations**

- l. Click the **X** to close the **New User Detail** (profile) window
- m. The user now has **Site Administrator Rights** and will be granted access to the **System Administration**, **My Staff** and **Reporting** tabs
- i. Full rights will be functional after overnight processing
- ii. Assistant Principals set to Site Admins will not receive automatic evaluator **Access Rights** to all staff in their school.
1. A Principal or designated Admin must set any AP's plan **Access Rights** in **My Staff > Administration Staff Management**

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Assigning School Based Admin Access Rights

Staff with **District Administrator Type** and **Site Administrator Type** have the authority to assign **Access Rights** to school-based teachers, support staff and assistant principals.

District Administrators only can set **Admin Access Rights** to Principal role evaluation plans. District Administrators have automatic **Re-Open Access Rights** for all staff plans in their district.

Principals (Site Admins) have automatic assignment of **Evaluator Access Rights** on all Staff (including Assistant Principals roles) in their school location.

1. District Administrator set School Based Access Rights

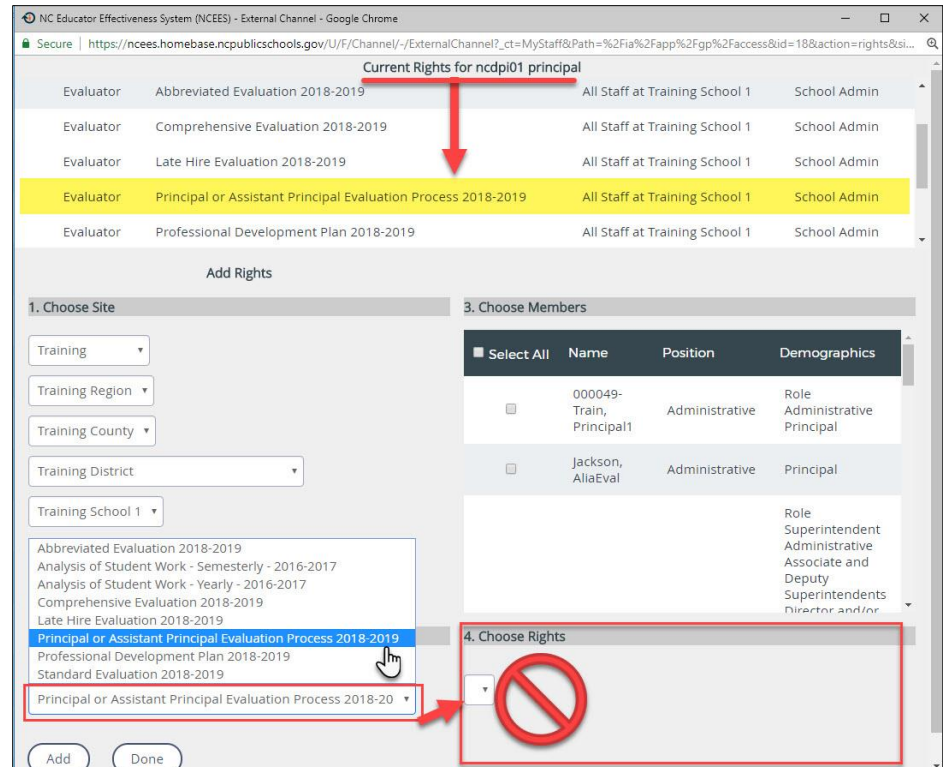
- a. Set/Change **PDP Type** and evaluation **Teacher Plan Type** for any teacher/user in the district
 - i. The **Teacher Plan Type** of **Principal or AP** is system assigned to roles of Principal, Assistant Principal and Other Assistant Principal
 1. This **Principal or AP** plan is already set as a **Teacher Plan Type** and auto-started meaning it can be seen by the plan owner (**My Evaluation**), district administrators and staff with assigned access rights (**Staff Evaluations**) after processing overnight. Plan owners must still start their plans and complete activities as outlined in evaluation Help Guides.
 2. All other **Teacher Plan Types** must be started by the plan owner (**My Evaluation**) before the plans will be viewable to District Admin or staff with assigned access rights (**Staff Evaluations**)

The screenshot displays the 'NC Educator Effectiveness System' interface. The top navigation bar includes 'HOME BASE' and 'NC Educator Effectiveness System'. The left sidebar lists various options: 'Options', 'All Staff', 'Staff Details', 'Evaluations', 'Bulk Evaluations Configuration', 'Print Template Macro Configuration', 'Print Template Library', 'Dashboards', 'Staff Competency Dashboard', 'Evaluation Status Dashboard', 'Aggregate Observation Heat Map', and 'School Observation Heat Map'. The main content area shows 'Staff Details' for 'Abbotts Creek Elementary'. A table lists staff members with columns for 'User', 'Position', 'HRMS ID', 'Teacher Plan Type', and 'PDP Type'. Red boxes highlight the 'My Staff' button in the top navigation, the 'Staff Management' button in the left sidebar, and the 'Teacher Plan Type' and 'PDP Type' columns in the staff table. Arrows point from the 'My Staff' button to the 'Staff Management' button and from the 'Staff Management' button to the staff table.

Staff	User	Position	HRMS ID	Teacher Plan Type	PDP Type
1.	Amanda Applegate	Instructional		-Not Selected-	-Not Selected-
2.	Kristen Argent	Instructional		-Not Selected-	-Not Selected-
3.	Mary Armstrong	Instructional		-Not Selected-	-Not Selected-
4.	Jennamarie Aull	Instructional		-Not Selected-	-Not Selected-

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- b. In **My Staff > Administration Staff Management** tab: Assign Plan Administrator **Access Rights** (**Evaluator, Observer, Peer Observer, PDP Mentor, Re-Open, View Only** and **Archived Plans**) rights to anyone in district (including removing or overriding rights given by a Site Admin)
- i. Note that setting **Access Rights to Principal Plans** are not available in **Administration Staff Mgt.**



Current Rights for ncdpi01 principal			
Evaluator	Abbreviated Evaluation 2018-2019	All Staff at Training School 1	School Admin
Evaluator	Comprehensive Evaluation 2018-2019	All Staff at Training School 1	School Admin
Evaluator	Late Hire Evaluation 2018-2019	All Staff at Training School 1	School Admin
Evaluator	Principal or Assistant Principal Evaluation Process 2018-2019	All Staff at Training School 1	School Admin
Evaluator	Professional Development Plan 2018-2019	All Staff at Training School 1	School Admin

Add Rights

1. Choose Site

Training

Training Region

Training County

Training District

Training School 1

Abbreviated Evaluation 2018-2019
Analysis of Student Work - Semesterly - 2016-2017
Analysis of Student Work - Yearly - 2016-2017
Comprehensive Evaluation 2018-2019
Late Hire Evaluation 2018-2019
Principal or Assistant Principal Evaluation Process 2018-2019
Professional Development Plan 2018-2019
Standard Evaluation 2018-2019
Principal or Assistant Principal Evaluation Process 2018-20

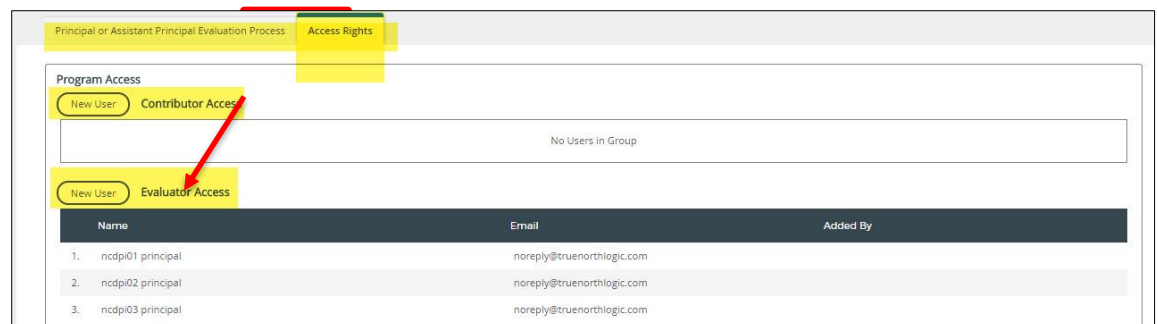
3. Choose Members

Select All

Name	Position	Demographics
000049-Train, Principal1	Administrative	Role Administrative Principal
Jackson, AllaEval	Administrative	Principal
		Role Superintendent Administrative Associate and Deputy Superintendents Director and/or

4. Choose Rights

- c. Set **Access Rights** to Principal Plans in **Staff Evaluations > select staff and open plan > Access Rights** tab: Assign Plan Administration Access Rights (**Evaluator, Contributor, Re-Open, View Only**) to **Principal Plans**



Principal or Assistant Principal Evaluation Process

Access Rights

Program Access

New User Contributor Access

No Users in Group

New User Evaluator Access

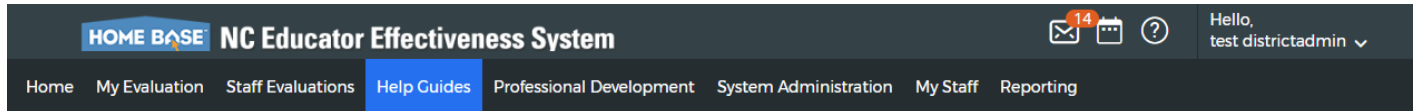
Name	Email	Added By
1. ncdpi01 principal	noreply@truenorthlogic.com	
2. ncdpi02 principal	noreply@truenorthlogic.com	
3. ncdpi03 principal	noreply@truenorthlogic.com	

- d. To complete any of these assignments, follow the directions provided in the **Assigning Access Rights** guides located on the **NCEES Help Guides** tab.

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Reporting

District Administrators can run the same reports as Site Administrators. However, their authority allows them to run reports both at the school and district levels. District Administrators may also create, save and publish Ad-Hoc Reports for both district and school or individual levels.



To run reports, follow directions provided in the **Administrator Guide – Report Management** located on the **Help Guides** tab.

District Administrator Guides

- [Assign Plan Types QRD 072018](#)
- [Assign Access Rights to Principal Plans QRD 072018](#)
- [Assign Access Rights to Teacher/Support Staff Plans 072018](#)
- [Escalation Chart](#)
- [E-Mail Notifications](#)
- [District Administrator Guide](#)
- [Re-Open Completed Plan Activities Guide 082018](#)
- [Locking Activities for SY18-19](#)
- [Authoritative Data Sources](#)

Reports

- [Accessing and Memorizing School-Level Reports - District Administrators](#)

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Data Management

For NCEES to perform properly, the employee demographic data (TNL Person Import File) loaded into the system each night must be accurate. NCDPI recommends that districts review the data in the source systems to ensure its accuracy and become familiar with the method for making corrections. The following data specifications are provided to assist in troubleshooting. District administrators should contact the Home Base Remedy Support Center with data related questions.

1. Data Sources

File Name	Description of File	
Person Data		
Field Name	Description	Authoritative Source
Unique_Person_Key (employee_id)	Unique identifier for each employee. The 10-digit unique identifier for a staff member. Staff UID	ODS from UID system
User_ID (username)	Used in the login process (Currently will be the UID but may change in the future with IAM implementation)	ODS from UID system
Employee Status (Active)	A = Active I = Inactive	ODS from UID system
Last_Name (Lname)	Last Name	ODS from UID system
First_Name (Fname)	First Name	ODS from UID system
Middle_Name (Mname)	Middle Name (or initial)	ODS from UID system
Access_Level (DemographicCode)	Truenorthlogic Role 1=super user 2=district admin 4=office admin 6=site admin 10=user	
Primary_Email (email)	E Mail	Powerschool
Location_Code (LocCode)	References Locations defined in location file.	ODS from Payroll system

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	Primary Location	HR systems
Job_Code	References Job Code defined in Demographic hierarchical Profile table. Used for Profile Targeting.	ODS from Payroll system
(DemographicCode)		
Career_Status	Determines whether a person has career status (yes/no)	HR systems
Classification_Status	Probationary Beginning Teacher	HR systems
	Probationary Other	
	Temporary/Interim	
Pre_K_Teacher	Indicates whether the teacher is Pre-K or not. HRMS is considering adding in their next release at the end of the month.	HR systems
Lateral_Entry	Indicates whether the teacher is a Lateral Entry	ODS from Licensure system
Career_Cohort	Licensure Year	calculated
License_Expiration_Date	Expiration date of current license	ODS from Licensure system

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FILE NAME	DESCRIPTION	
Location Data		
Field Name	Description/Comments	Authoritative Source
Location_Code (LocCode)	Location Code/Unique Alphanumeric Location Code	ODS from EDDIE/PowerSchool system
	01A-995	
	LEA Code if all positions are numeric	
	Charter school Code if first 2 positions are numeric and 3rd position is alphabetic.	
	LAST 3-DIGITS (LLL):	
	000 for LEAs and charter schools	
	300 or greater for schools	
Location_Name (LocName)	Location Name	ODS from EDDIE/PowerSchool system
Location_Address1 (LocAddr1)	Address 1	ODS from EDDIE/PowerSchool system
Location_Address2 (LocAddr2)	Address 2	ODS from EDDIE/PowerSchool system
Location_City (LocCity)	City	ODS from EDDIE/PowerSchool system
Location_State (LocSt)	State	ODS from EDDIE/PowerSchool system
Location_Zip (LocZip)	Zip	ODS from EDDIE/PowerSchool system
Location_Phone	Phone Number/primary location (school) phone number.	ODS from EDDIE/PowerSchool system

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Location_Level (LocTypeDes)	Location Levels – used to create location hierarchy.	Not collected
	H = High Schools	
	M = Middle Schools	
	E = Elementary Schools	
	S = Special Centers	
	A = Administrative	
LEA_Name (DistrictName)		ODS from EDDIE/PowerSchool system
LEA_No (DistrictCode)		ODS from EDDIE/PowerSchool system
County_Name (CountyName)		ODS from EDDIE/PowerSchool system
County_Code (CountyCode)		ODS from EDDIE/PowerSchool system
Region_Name (RegionName)		ODS from EDDIE/PowerSchool system
Region_Code (RegionCode)		ODS from EDDIE/PowerSchool system
State_Name (StateName)		ODS from EDDIE/PowerSchool system
State_Code (StateCode)		ODS from EDDIE/PowerSchool system

*ODS = SAS Operational data store / reporting

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File Name							
Demographic Data							
DemCode	Level1	Level2	Level3	Level4	Level5	Level6	GroupTypeId
111	Administrative	Role	Superintendent				10
112	Administrative	Role	Associate and Deputy Superintendents				10
113	Administrative	Role	Director and/or Supervisor				10
114	Administrative	Role	Principal				6
115	Administrative	Role	Finance Officer				10
116	Administrative	Role	Assistant Principal				10
118	Administrative	Role	Assistant Superintendent				10
ADM	Administrative	Role	Other				10
117	Administrative	Role	Other Assistant Principal Assignment				10
153	Administrative	Role	Administrative Specialist				10
CY0	Instructional	Certification Year	Licensure Cycle Year 0				10
CY1	Instructional	Certification Year	Licensure Cycle Year 1				10
CY2	Instructional	Certification Year	Licensure Cycle Year 2				10
CY3	Instructional	Certification Year	Licensure Cycle Year 3				10
CY4	Instructional	Certification Year	Licensure Cycle Year 4				10
CY5	Instructional	Certification Year	Licensure Cycle Year 5				10
CSK	Instructional	Classification	Standard	Pre-K			10
CTB	Instructional	Classification	Temporary/Interim	Beginning Teacher			10
CLB	Instructional	Classification	Comprehensive	Beginning Teacher			
CLL	Instructional	Classification	Comprehensive	Lateral Entry			
CLP	Instructional	Classification	Comprehensive	Other			
CPK	Instructional	Classification	Comprehensive	Pre-K			
UNB	Instructional	Classification	Unlicensed	Beginning Teacher			10
ETA	Instructional	Evaluation Type	Abbreviated				10

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ETC	Instructional	Evaluation Type	Standard				10
ETP	Instructional	Evaluation Type	Comprehensive				10
121	Instructional	Role	Teacher - Classroom				10
123	Instructional	Role	Teacher - ROTC				10
124	Instructional	Role	Teacher - VIF				10
1315810	Instructional	Role	School Library Media Coordinator				10
1315830	Instructional	Role	School Counselor				10
132	Instructional	Role	Audiologists				10
133	Instructional	Role	School Psychologist				10
134	Instructional	Role	Mentor-Instructional Support				10
135	Instructional	Role	Lead Teacher - Instructional Support				10
INS	Instructional	Role	Other				10
1315320	Instructional	Role	School Social Worker				10
1355860	Instructional	Role	Instructional Technology Facilitator				10
127	Instructional	Role	Master Teacher				10
1315120	Instructional	Role	Teacher Leader-CTE				10
1315220	Instructional	Role	Teacher Leader-CTE Special Pops				10
1315330	Instructional	Role	Teacher Leader-Remedial Support				10
1316110	Instructional	Role	Teacher Leader-Curricular Support				10
1316200	Instructional	Role	Teacher Leader-Special Populations				10
1316620	Instructional	Role	Teacher Leader-Support Coach				10

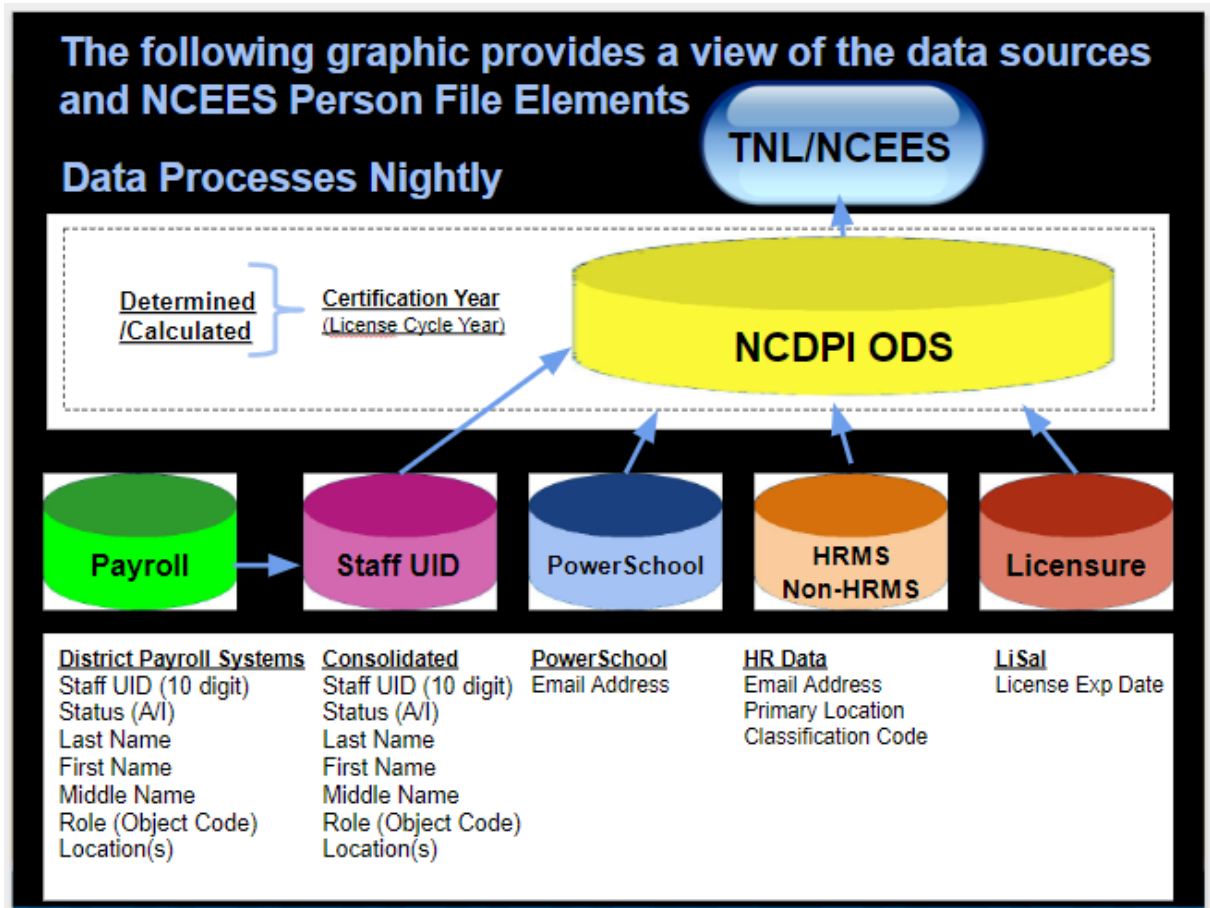
*GroupTypeID

10=User

6=Site Administrator

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2. Data Sources Flow from NCDPI to TNL/NCEES Person Import File



3. Data Processing Nightly Timeline

