

District Administrator Guide

Primary Audience: District Administrators

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

Administrator Type/Rights Guide

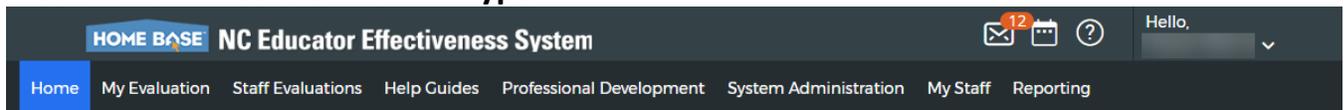
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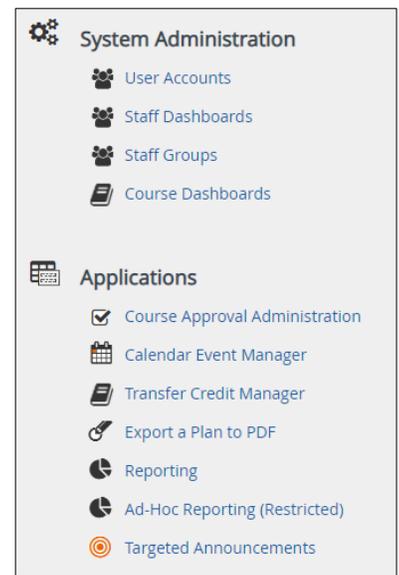
Overview of System Administrator Rights

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:

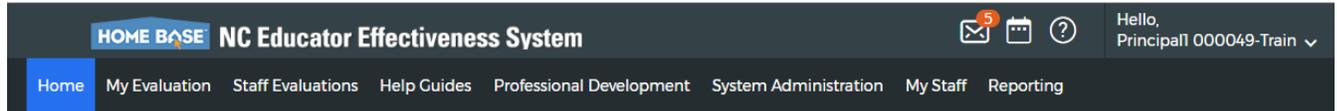


- a. Access to 8 tabs: **Home, My Evaluations, Staff Evaluations, Help Guides, Professional Development, System Administration, My Staff, and Reporting**
- b. Ability to see all plan and user data at their entire district and new in SY2018-2019 **Assume Identity** of users below District Admin type
- c. Ability to edit **My Staff > PDP Type** and the evaluation **Teacher Plan Type** for any user in the district
- d. 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
- e. 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
- f. Ability to assign and edit **Admin Types**: can make other users **District Administrator** or **Site Administrator**
- g. Ability to search **User Accounts** and **Staff and Course Dashboards**
- h. Ability to create and manage **Staff Groups**
- i. Ability to manage a **Calendar Event** or **Targeted Announcement** for the entire district or any school in the district

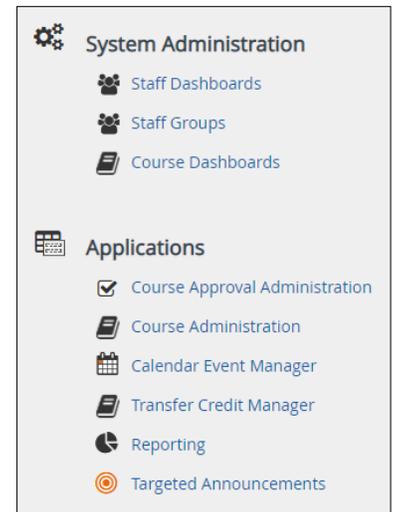


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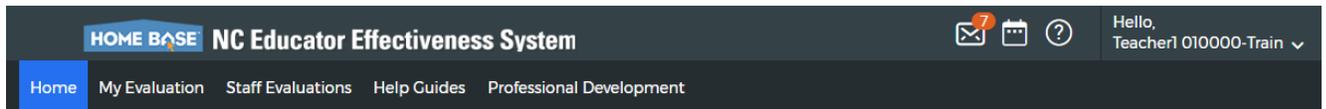
2. Site Administrator:



- a. Access to 8 tabs: **Home, My Evaluation, Staff Evaluations, Help Guides, Professional Development, System Administration, My Staff, and Reporting**
- b. Ability to see all plan and user data at their site (school)
- c. 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)
- d. Ability to edit the **My Staff > PDP Type** and the evaluation **Teacher Plan Type** for any user in their site (school)
- e. 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)
- f. Ability to manage a **Calendar Event** or **Targeted Announcement** for their site (school)



3. User:



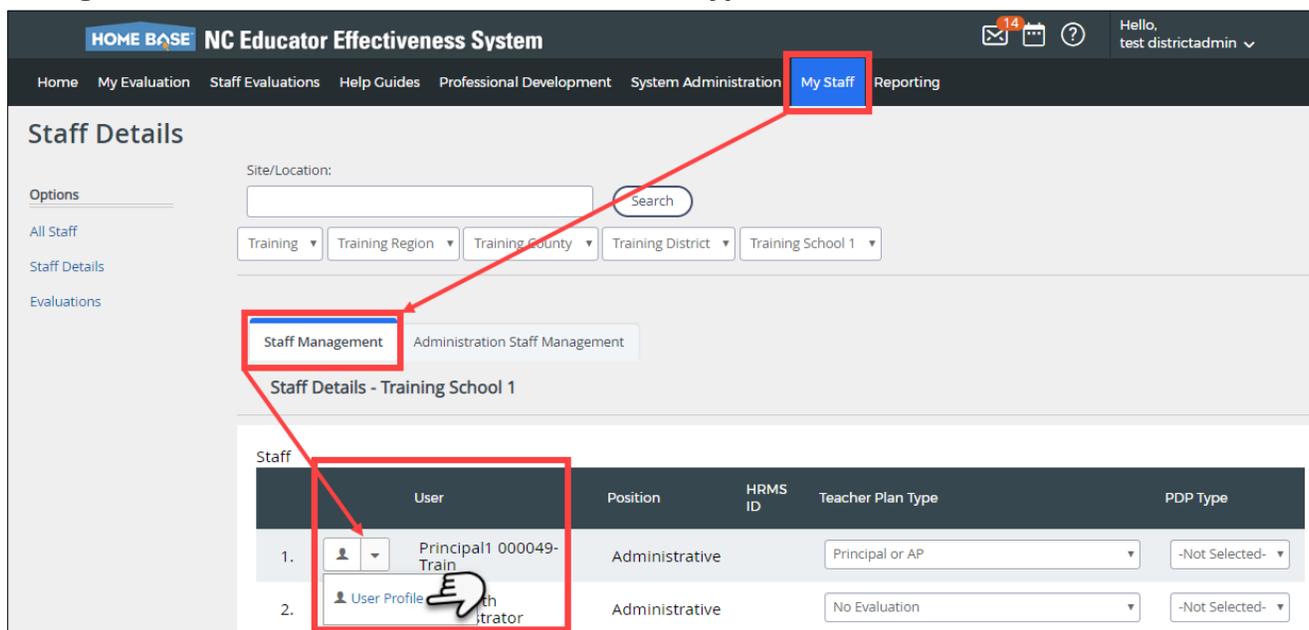
- a. Access to 4 tabs: **Home, My Evaluation, Help Guides, Professional Development**
- b. Access to a 5th tab: **Staff Evaluations**, however will not see any staff evaluations
 - i. Unless they have been assigned **Access Rights** by a Site Administrator or District Administrator, then will see Staff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

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Assigning District Administrator Admin Type

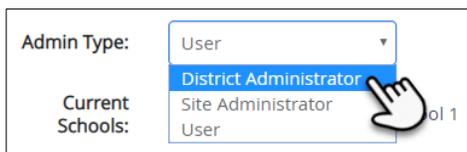
District Administrators and State (NCDPI) Administrators have the authority to assign **District Administrator Admin Type**. If there isn't a District Administrator assigned for a specific district, the Human Resources Director should contact the state's Home Base Remedy Support Desk to request assignment. 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

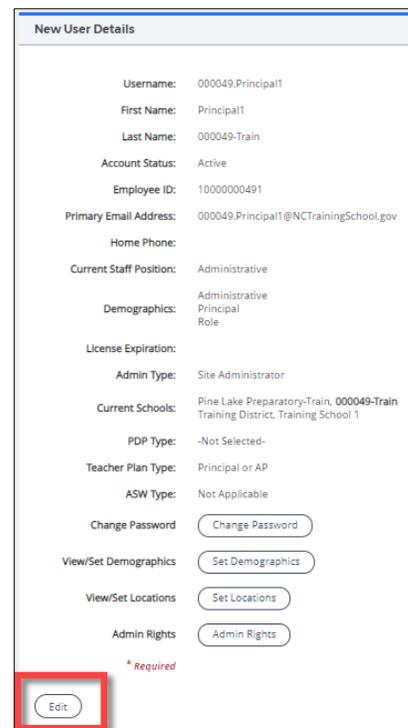
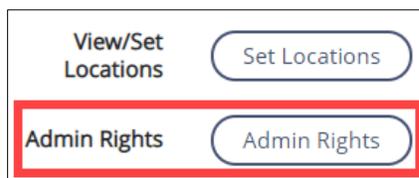


- Click on **My Staff**
- From **Staff Management** tab locate **User**
- Click on the drop down arrow next to the user name that will be assigned **Admin Type** of **District Administrator**
- Click **Edit** button to open **New User Details** (profile)
- Click on the **Admin Type** drop down and select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

- Click **Save**

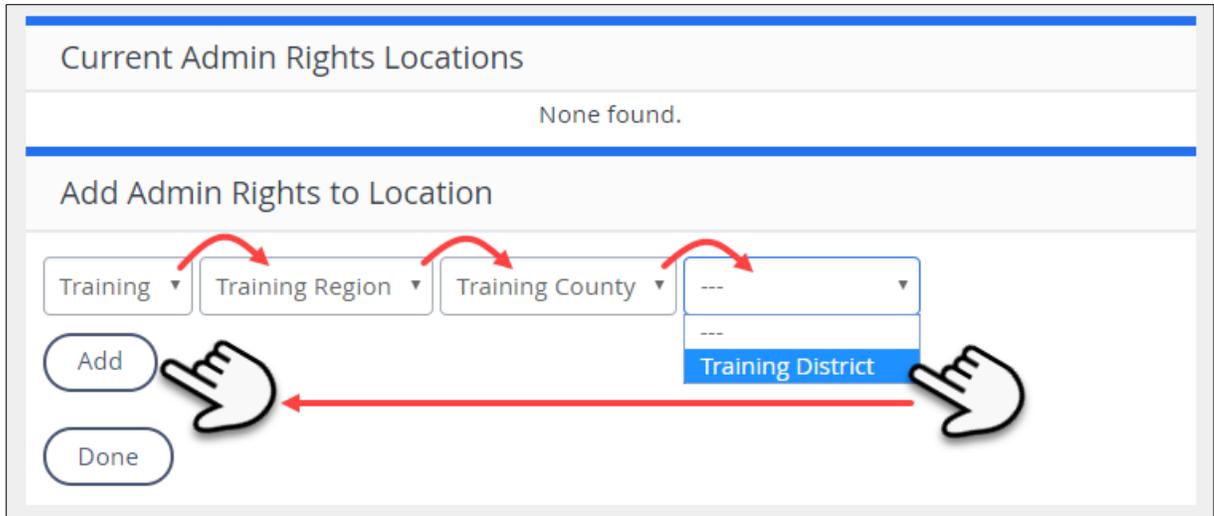


- Click on the **Admin Rights** button that appears in the **User Details** (profile) window



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

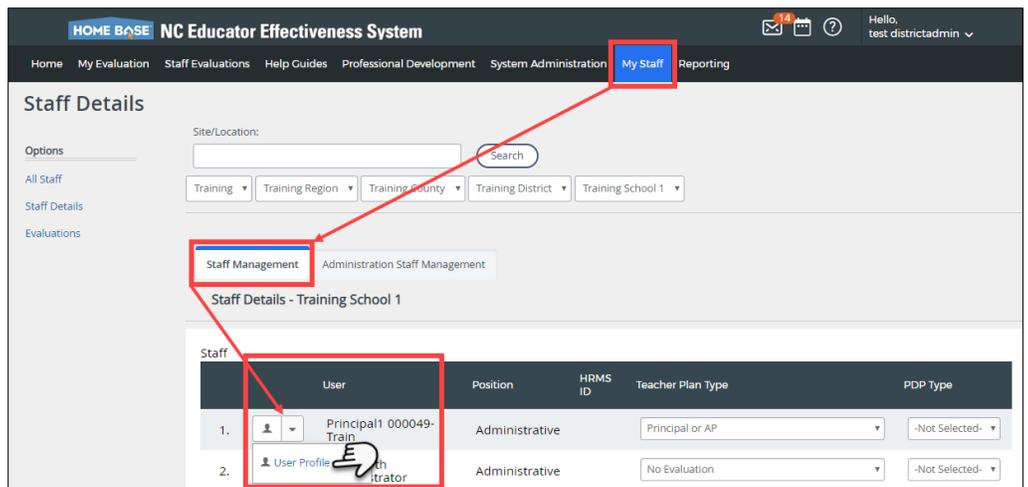
Principals automatically receive **Site Administrator Admin Type** with associated **Access Rights**. Assistant Principals automatically receive **User Admin Type** with limited **Access Rights**.

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.

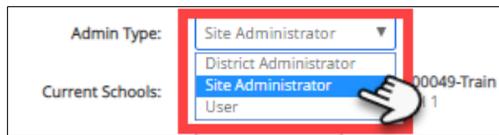
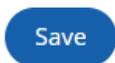
Staff assigned as a **District Administrator Admin Type** have the authority and ability to edit **User Admin Types** to assign **Site Administrator Admin Types** in NCEES by following these steps:

1. Assign or Edit Site Administrator Admin Type

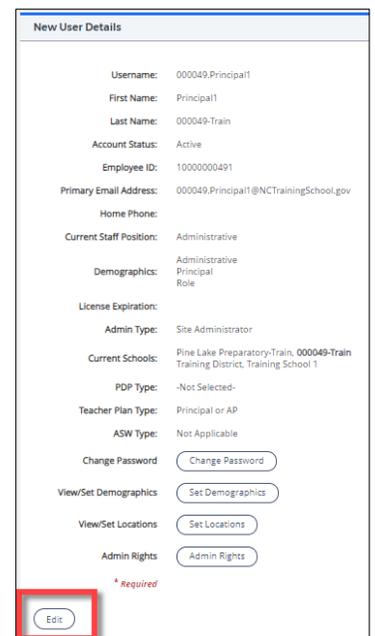
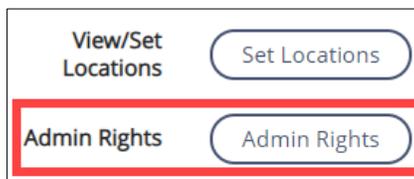
- a. Click on **My Staff**
- b. From **Staff Management** tab locate **User**
- c. Click on the drop down arrow next to the user name that will be assigned **Admin Type of Site Administrator**



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

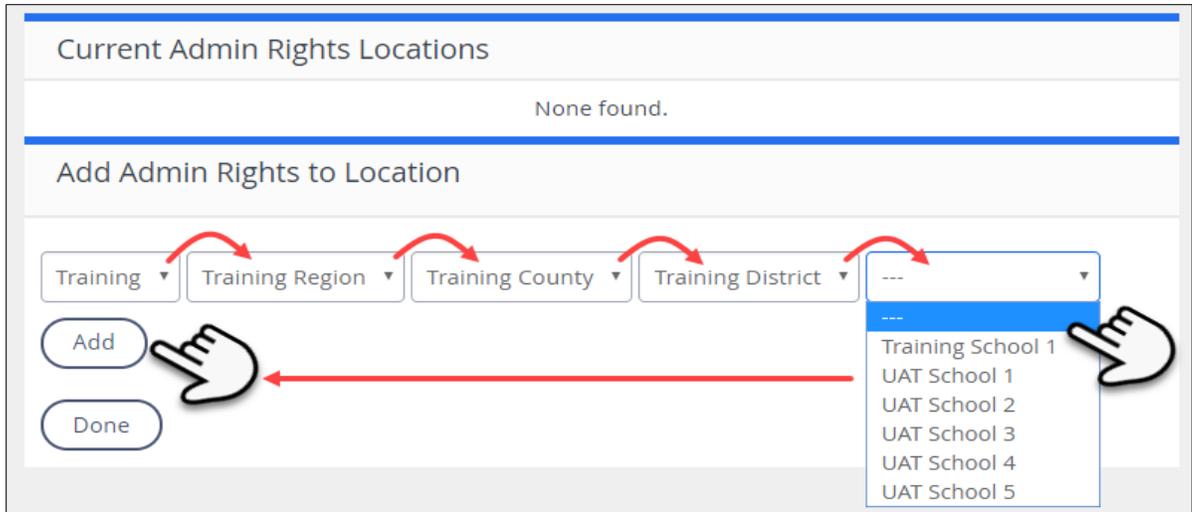


- g. Click on the **Admin Rights** button that appears in the **User Details** (profile) window



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



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

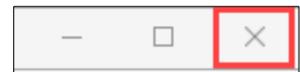
- i. Assigning locations is limited to setter's location assignment



- 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

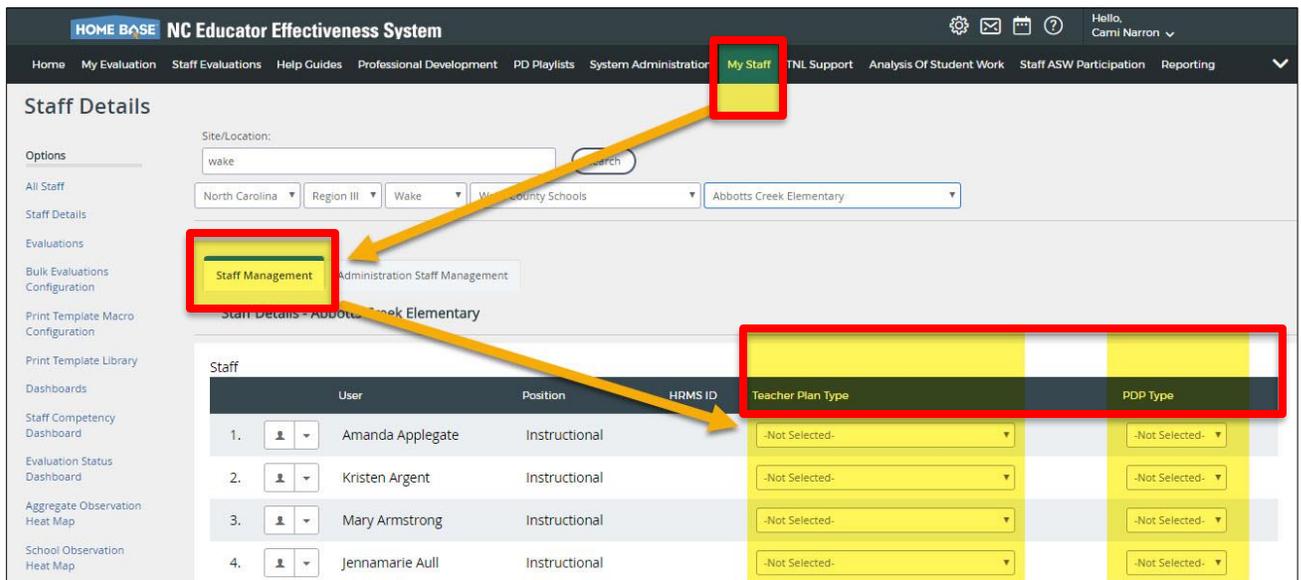
Staff with **District Administrator Type** and **Site Administrator Type** have the authority to assign **Access Rights** to school-based teachers, support staff and assistant principals.

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.

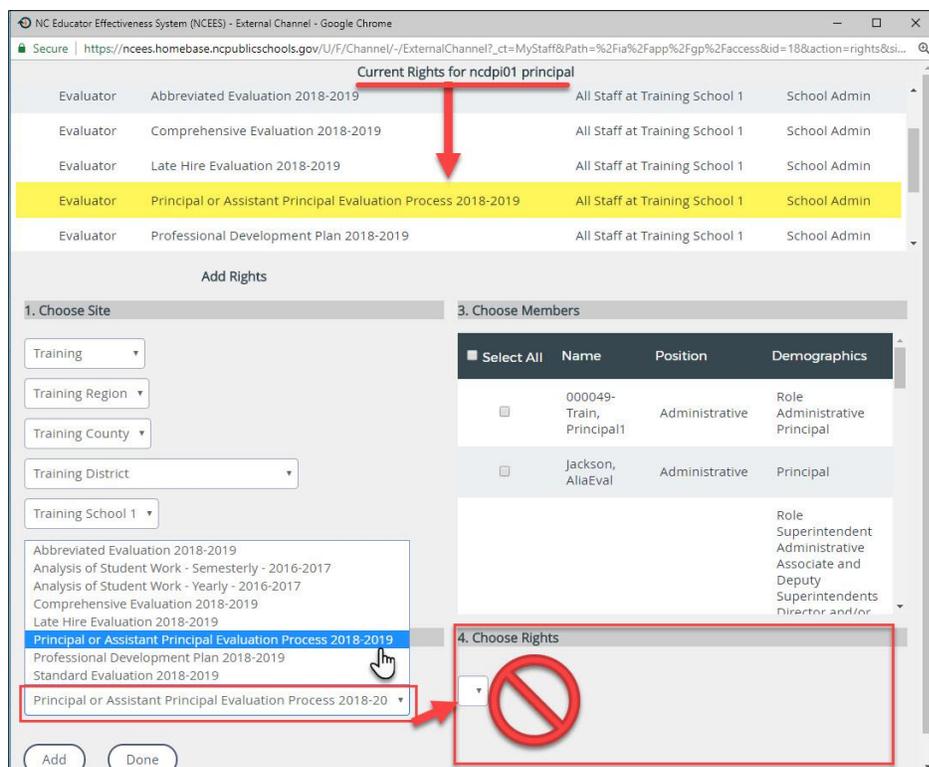
1. District Administrator set School Based Access Rights

- 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**)

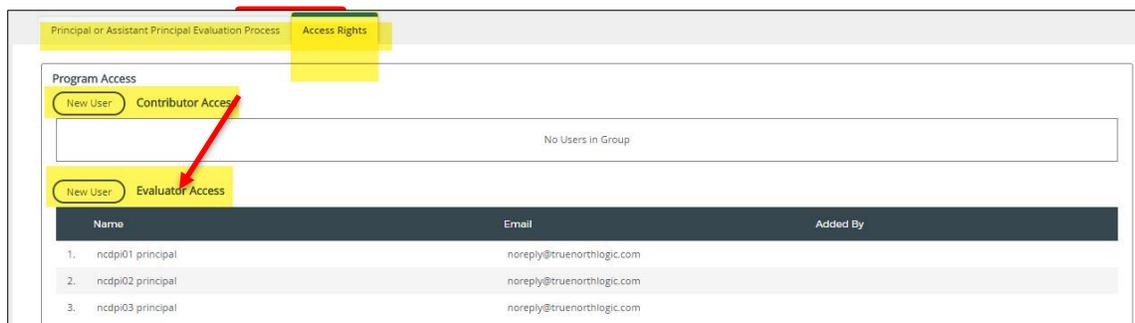


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- b. In **My Staff > Administration Staff Management** tab: Assign Plan Administrator **Access Rights** (**Evaluator, Observer, Peer Observer, PDP Mentor, Re-Open, View Only and Archived Plans**) rights to anyone in district (including removing or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



- 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**

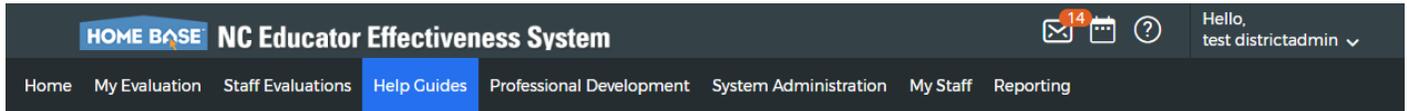


- d. To complete any of these assignments, follow the directions provided in the **Assigning Access Rights** guides located on the **NCEES Help Guides** tab.

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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 |

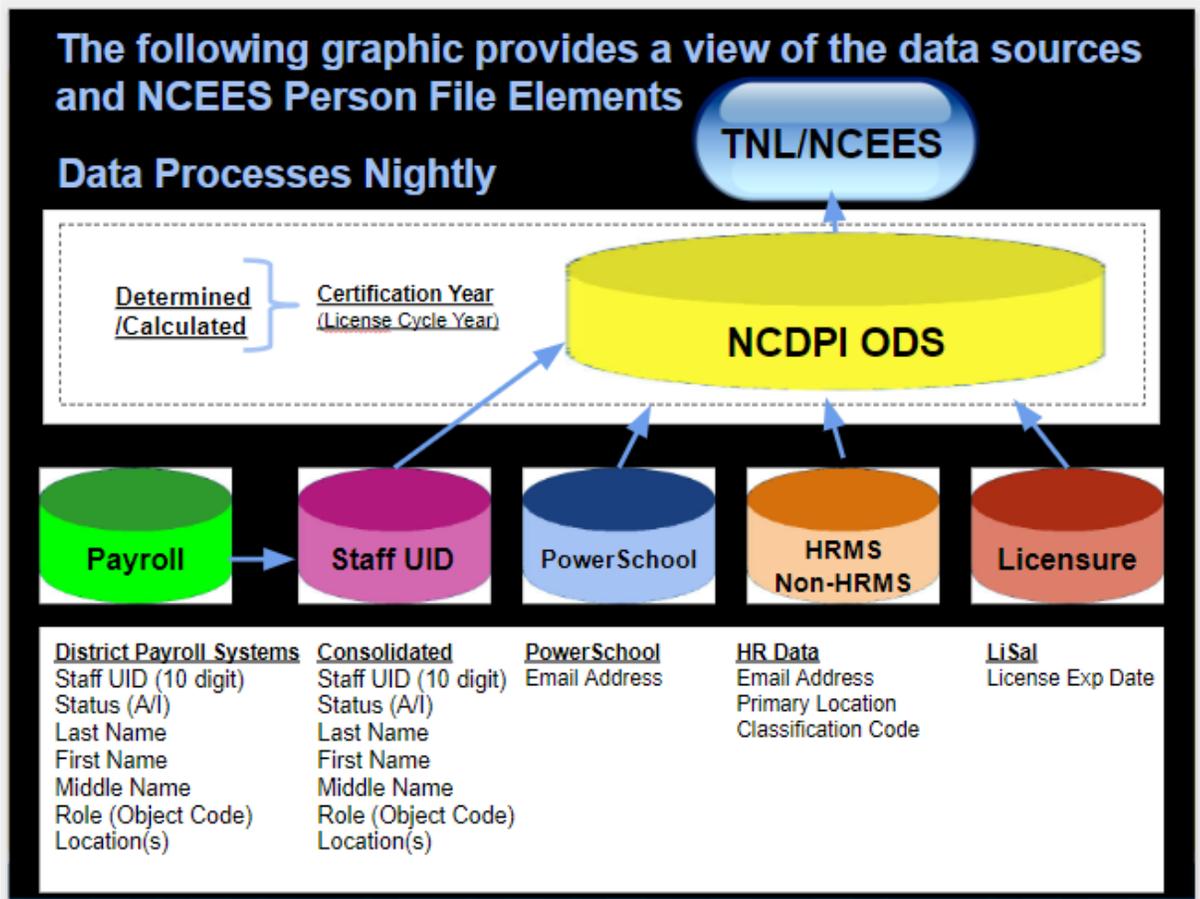
*GroupTypeID

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

