

Security Access: Setting Staff Types (Roles)

The purpose of this document is to outline information that a person designated as a Data Security Coordinator at an Education Organization needs to know in order to set and manage local staff types (roles). I also recommend watching this [online training video](#).

Prerequisites:

- The Education Organization has registered their domain.
- The Organization Leader has accepted the organization assurances and designated up to two Data Security Coordinator(s). Only the Organization Lead can change the Security Coordinators. Instructions are online at: [Accepting Organization Assurances](#)

Guides for how to complete prerequisites be found online at www.doe.in.gov/link/unified-access

Data Security Coordinators

Every organization has up to two Data Security Coordinators who can set the LINK staff types (roles) for the persons within their corporation. These are persons who are usually within the technology department and are designated by the Superintendent/Organization Lead. A listing of persons designated is on the unified access website,

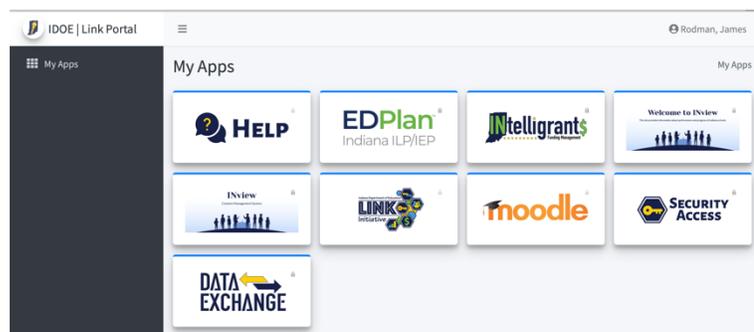
The following are Instructions for Data Security Coordinators:

Login

Security Access can be accessed via the LINK Portal (<https://link.doe.in.gov>) You will utilize either the “Login with Google” or “Login with Microsoft buttons”, dependent on your organizations’ choice of either Google’s G Suite for Education or Microsoft 365, while registering the domain.

Upon login, users will see displayed the IDOE systems to which they have access, as tiles.

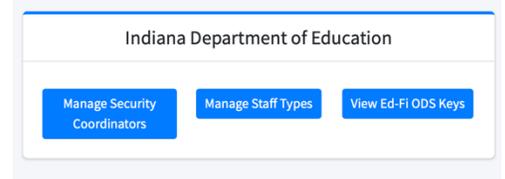
Those persons designated by the lead of their organization as a Data Security Coordinator will have the “Security Access” tile.



You may also login directly by going to <https://security.doe.in.gov>. This login will only work for those persons who have the appropriate access.

How to set Staff Types (roles)

1. Click on the Security Access Tile
This will take you to the Security Portal, where you will see the organization(s) you have access to manage.
2. Click, “Manage Staff Types”
 - Note: “Manage Security Coordinators” is only available to the leader of your organization;
 - “View Ed-Fi ODS Keys” is how IDOE will securely provide Ed-fi keys to corporations/schools



A list of staff and previous staff type assignments will appear.

3. Click the button, “Add Staff Type Assignment”
4. Complete the required information and then click “Save”:

Staff Type Assignments Dashboard / Staff Type Assignments

Indiana Department of Education

Name	Email	SPN	State Org ID	Staff Type	Start Date	End Date	Actions
							Clear Filter
	mikevilla@mailinator.com	00207281	1088000000	Data Administrator	Thu Mar 12 2020		Remove

[Add Staff Type Assignment](#)

Add Staff Type Assignment

Email

SPN

State Organization ID

Staff Type

Begin Date

End Date

Email: This needs to correspond to the staff members’ Google G-Suite or Microsoft 365 domain of your organization.

SPN: School Personnel Number. Required. This can be looked up/requested via the STN Application Center.

Staff Type: This is the staff type you wish to provide the staff member.

Begin Date: Date the access for this staff type should begin.

End Date: Date the access for this staff type should no longer function. If you know up-front when that date is, please enter the end date within LINK. Otherwise, leave blank.

Staff Types and the Ed-Fi Data Exchange System

The Ed-Fi Data Exchange System only applies to corporations and schools. The IDOE has designed the staff types in such a way they can (eventually) be sent directly from the school's Indiana Ed-Fi certified student information system (SIS). Setting staff types directly in the Security Access portal is meant as a way to get started while transitioning to the new modern technologies. Before adding too many of these manually, you may wish to have a conversation with your SIS vendor on where to enter the data/information in the local SIS software. This will assist with any data submitted manually to be in synch with data entered in the SIS software.

Key Contacts

Key Contacts are a subset of Staff Types, which are intended to be utilized only for communication by the IDOE and unlike other staff types, do not provide access or functionality within other systems. Collecting, obtaining and maintaining these critical business contacts, now known as "Key Contacts" is important in IDOE's effort to streamline communication processes.

Some things to know about key contacts:

- IDOE has NOT officially transferred "Assessment Test Coordinator" and "Special Education Director" to the Key Contact list. IDOE will officially communicate when these transitions happen and what the new procedures are. While we would like these Key Contacts entered for comparison purposes, please make sure to also continue to follow the official, existing procedures, so these offices have the contact information they need.
- IDOE pre-populated data for the principal and superintendent contacts based on data we had. Data will need to be updated.
- Key contacts will NOT provide access to IDOE systems. The information will be utilized to indicate the primary contact(s) for communication from IDOE.
- Key contacts are primarily for corporations and schools. Add only those that apply to your organization. (e.g. a special education cooperative doesn't necessarily have a Principal, yet does have a Special Education Director)

Key Contacts

- **Superintendent** – all corporations/charters
- **Assistant Superintendent** - all corporations/charters

- **Principal** - all public/charter and non-public schools
- **Assistant Principal** - all public/charter and non-public schools

- **Financial Contact** - all organizations
- **Chief Technology Officer** - all corporations/charters, accredited non-publics
- **Special Education Director** - all corporations/charters, special education cooperatives, charter authorizers
- **Assessment Test Coordinator** - all corporations/charters, accredited non-publics

Special Education Director:

- The Special Education Cooperatives will enter their Special Education Directors
- A corporation may or may not also have a local Special Education Director, or contact.
- Each charter authorizer will enter who they wish to receive special education communication

LINK STAFF TYPES

The below descriptions for each staff type are guidelines. Local decision should be made regarding which staff types best “fit” each staff’s local responsibilities. Superintendents, School Administrators of Non-publics, and Finance Officers are expected to certify (sign-off) on data so appropriate staff types (roles) must be assigned to those staff.

LEA Administrator

This staff type is for those staff who are, or will be, responsible for overseeing the data for their corporation. It is recommended the LEA Administrator role is assigned to superintendents or director-level persons within a public corporation. Assign using the StateOrganizationId of the corporation.

- INview: supplement accountability data with pictures, text, and highlights for the corporation and schools within.
- Data Exchange: This staff type is for the person(s) who are responsible for the review and certification (sign-off) of corporation or school data. Typically, this will be the superintendent.

w/Data Certification

The decorator role of “Data Certification” with LEA Administrator is a powerful combination; This provides signoff power throughout IDOE systems.

For example:

- Data Exchange: a person with these roles is able to complete the certification (sign-off) process that the student-level counts submitted to the state are accurate and without error. They are responsible for the final review and certification (sign-off) of the six data certification submission cycles.
- INTelligrants: this staff member will have the ability to oversee all grants, sign contracts, and be the second signature on re-imbursements.

Financial Administrator

It is recommended this role is assigned to the financial officer, CFO, etc. of a corporation or non-public school. If you are a corporation/charter, assign using the StateOrganizationId of the corporation.

- **Data Exchange:** This staff type is for the person(s) who are responsible for the review of financial data.

w/Data Certification

The decorator role of “Data Certification” with Financial Administrator is a powerful combination; This provides signoff power throughout IDOE systems for a Financial Administrator.

- Data Exchange: ability to complete the certification (sign-off) of the six data certification submission cycles as it pertains to financial data counts.

- INtelligrants: ability to view all financial aspects of the grant and initiate re-imbursement requests.

School Administrator

This staff type is for principals--both public and non-public. It is recommended the School Administrator role be assigned to the director or principal within the school. Make sure assign to the StateOrganizationId of the school.

- INview: supplement accountability data with pictures, text, and highlights for the school

w/Data Certification

- Data Exchange: Non-public School Administrators are responsible for the review and certification (sign-off) of non-public school data.
- INtelligrants: Non-public School Administrators sign contracts, sign-off on monies, assigns grants/documents to others

Data Administrator

You might think of this as the “state reporting” role. The staff type of Data Administrator is for staff who are responsible for reviewing the data validation results from either a template upload or direct flow of data from the SIS to the IDOE. It is recommended these staff have an overall knowledge and understanding of all student and staff data requirements.

- Data Exchange: Ability to see all errors, warnings, and conflicts in the submitted data.
- Data Exchange: Ability to export this information to excel for distribution to other staff for correction as needed.
- Data Exchange: Ability to view total student and staff counts for verification. T
- Data Exchange: Ability to utilize the templates to upload data not supported through the local student information system.
- Data Exchange: Ability to lookup STNs/SPNs (identities).

Data Viewer

This staff type is for person(s) who need View access only.

- Data Exchange: View only access to data

Data Certification

As covered above, this is a decorator staff type that adds additional functionality. This staff type adds the ability to certify (sign-off) on data.

- “LEA Administrator” + “Data Certification” –Generally for superintendents
- “School Administrator” + “Data Certification” –Generally for non-public principals
- “Financial Administrator” and “Data Certification” – Generally for corporations and non-public schools

The INtelligrants System

Please note that there are two versions of INtelligrants. There is an on-premise version (which most other state agencies are using) and the newer, cloud-based one (which all IDOE grants are in). The only way to access the IDOE grants is via the LINK Portal. Grants via other state agencies should contact that state agency. For assistance with the Indiana Department of Homeland Security Grants, please contact grants@dhs.in.gov.

INtelligrants is a third-party customized off-the shelf solution (COTS). For this system, we mapped LINK staff types to the INtelligrants roles. Roles should not be set or modified within INtelligrants—rather, the Security Coordinator should set the appropriate LINK types.

LINK Staff Types needed	INtelligrants Role
LEA Administrator AND Data Certification	SubGrantee Administrator
Grant Contributor AND Data Certification	SubGrantee Project Director
Financial Administrator AND Data Certification	SubGrantee Fiscal Agent
Grant Contributor	SubGrantee Staff
Grant Viewer	SubGrantee Viewer
School Administrator AND Grant Contributor	School Level Project Director

Subgrantee Administrator—You will assign LINK staff types of “LEA Administrator” and “Data Certification”. This person is a superintendent-level or district level person who oversees all grants, signs contracts, is the second signature on reimbursement requests and assigns the Pre-Application to other persons. Ideally, there is one person per LEA who is overseeing all of the grants. This person will responsible for assign other persons access to grants and documents within the system. Staff types should be set at the StateOrganizationID of the corporation.

Subgrantee Project Director— You will assign LINK staff types of “Grant Contributor” and “Data Certification”. This person is usually the most active user in the system for a particular grant or grants, which are assigned by the Subgrantee Administrator. Staff types should be set at the StateOrganizationID of the corporation.

Subgrantee Fiscal Agent— You will assign LINK staff types of “Financial Administrator” and “Data Certification”. This person is usually the corporation treasurer. Staff types should be set at the StateOrganizationID of the corporation.

Staff— You will assign LINK staff type of “Grant Contributor”. This is a person who can contribute to grants which are assigned to them, but cannot submit them. May have staff types set at the school level.

School Level Project Director – You will assign LINK staff types of “School Administrator” and “Grant Contributor” to the StateOrganizationID of the school. This allows a school administrator, from either a public or private school, to provide specific information regarding their school.

Once the security coordinator has assigned the appropriate LINK staff types, all the users should logout completely and back into LINK. Once logged in, they will go into INtelligrants and setup their dashboard. After this, the Subgrantee Administrator can assign them to the grants or documents needed, such as the pre-application.

Frequently Asked Questions - General

As a security coordinator, I noticed that the first time I logged in, some of the principals and superintendents have been populated. Where is it getting their email addresses?

Principal and Superintendent data was pre-populated by the IDOE's 2020 Period 1 CE/CP information. Email was pulled from the SPN, updated by the SPN collection. We apologize if the information is missing or incorrect—please remove and re-add the correct information as needed.

We have a principal who has the correct info on the INview pages, but has the wrong email address on the roles page within the Security Portal. Do I simply remove her and re-add with correction?

Yes, please remove and re-add the correct information. To pre-populate principal and superintendent data, we needed to begin with a list that contained the SPN's. The data and email address we used was from the data reported to us for the SPN in the Application Center. The Data Exchange effort will streamline the information to come directly from the schools. We will utilize superintendent and principal contact information from LINK to update the INview website in the near future.

It appears our Superintendent will have multiple staff types: Superintendent, LEA Administrator, Data Certification. How is this done?

Please add a new line within the Security Portal for each person-organization-stafftype. A superintendent would have three rows.

When I add a staff type, I am not able to add a name. Completing the name field is not an option. Am I missing something?

The name that appears in the Security Portal will appear once the person logs in successfully. This name comes from your local G-Suite or Microsoft 365 account. IDOE does not intend to utilize this name elsewhere and will utilize the name listed on the SPN for staff for other applications.

Are we not able to Edit existing Staff Type Assignments? Looks like I only have the option to remove, or add.

Correct. If the information is incorrect, please remove the information and re-add it. If the information came directly from your SIS, please modify the data in that location.

Phrasing is a bit confusing: Key Contacts being a part of the Staff Types, roles, et

Understand. Staff Type is the word that encompasses both Roles and Key Contacts. We wanted the Key Contacts to be completely separate from driving access to any system functionality, so it was abundantly clear who should be communicated with. These contacts are flowing directly into the IDOE's new Schools360 system, for all of IDOE to see/utilize.

What is the difference between the Financial Administrator and Financial Contact?

The Financial Contact is a Key Contact and will only be utilized for communication purposes. The Financial Administrator is a staff type which drives security access in IDOE Applications; for example, they will be able to view information in Data Exchange and this staff type will be utilized in other IDOE systems.

Is there a way to search for an employee or print the security staff listing? We already have many pages of employees listed.

If you click on the "email" header, this will sort all of the information by email address. We also intend for you to be able to filter these data by the column headers. Print/download functionality does not currently exist as we ultimately want these data to flow nightly from your Indiana Ed-fi compliant SIS.

The staff member does not have a School Personnel Number (SPN). I thought this was for licensed educators only?

The SPN is simply a unique state ID. Any staff member who you wish to provide access to via LINK may have an SPN. Please work with the person who does your state reports to request one via the STN Application Center. This person will perform a lookup on the person's information (They will need DOB and Last4 SSN). Upon finding no matches, an SPN can be requested. The SPN will be available for use within LINK the following day.

Frequently Asked Questions – INtelligrants

I have assigned INtelligrants staff types to a staff member. They logged into LINK and they either don't have the INtelligrants tile or they obtain a server error when they click on it. What should I do?

First, check to make sure the appropriate LINK staff types (roles) are assigned for the person according to the grid, above. Too few staff types and the connection won't function. Too many, and the user may receive conflicting roles within INtelligrants. Then, have the end-user logout completely, close their browser, and login again. This allows the local browser to refresh the local cache.

Will the people I assigned receive an email indicating they are set up to access the INtelligent system?

Staff do not receive an email from LINK when staff types (roles) are set. If they login and have INtelligrants roles, they do receive an email with the INtelligrants roles they have received when they access that system for the first time.

For INtelligrants some of the grants include a non-public school within our corporation boundary. Do we have to create a google account on our domain to allow the non-public principal to access the grant? Or what is the process?

No, they should not receive accounts on your domain. You can either work directly with the non-public school to complete the school information and add it to your grant or the non-public school can register their Google or Microsoft accounts with LINK via the following process. (95% of accredited non-publics have already completed step 1)

- *Step 1: The non-public school registers their domain with the IDOE*
- *Step 2: The non-public school designates a Security Coordinator to manage their LINK accounts/staff types (roles)*
- *Step 3: The non-public security coordinator provides the staff types of “School Administrator” and “Grant Contributor” to the appropriate staff member. This will provide the INtelligrants icon within LINK and the INtelligrants role of “School Level Project Director”*
- *Step 4: The nonpublic schools will have a “sub-document” to complete, which means they won’t need to have access to the LEA’s full application.*

The LEA will also have the ability to complete the information on behalf of the non-public school.

For INtelligrants, what “Staff Type” should I choose for Title 1 Lead Teachers? Is it “Grant Contributor” or “Grant Viewer” or “Data Viewer”?

This depends on the needs of the LEA.

- *Subgrantee staff (if they want the individual to help write)- Assign LINK staff type of Grant Contributor*
- *Subgrantee viewer (if they just want them to have access). -Assign LINK staff type of Grant Viewer*

The LINK staff type of Data Viewer does NOT lead to any INtelligrants access.

I have assigned users the correct LINK staff types to gain access to INtelligrants. They are trying to access the Title Pre-application. What is the correct process for this?

There should ideally be one person per LEA who is overseeing all of the grants. This is ideally a Superintendent or district-level person. This person will be assigned LINK staff types of LEA Administrator + Data Certification (Subgrantee Administrator). This person will be able to assign other persons within INtelligrants access to other grants, including the Pre-Application.

For example, you may have a person who will be in charge of writing one or two grants. This person should be assigned LINK staff types of Grant Contributor + Data Certification (Subgrantee Project Director). After this person has logged into Intelligrants, the Subgrantee Administrator will assign rights to the Pre-Application.



Dr. Jennifer McCormick
Superintendent of Public Instruction

DEPARTMENT OF EDUCATION

Working Together for Student Success

Or, you may have a person who will only contribute to a single grant or grants. Assign the LINK staff type of Grant Contributor. The Subgrantee Administrator will assign this person to the appropriate locations within INtelligrants.