



Managing CDW Registrations

Administrator's Guide

Last Updated: 11/16/2012



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Purpose

The purpose of this registration system is to provision users for the CEDARS Data Warehouse (CDW). The CDW provides individual user access to historical data collected from multiple authoritative sources at the student and staff level.

Who Approves Whom

Program, User Role	Approver
DPI (all roles)	DPI Super User
LEA/Charter School, Security Officer	DPI Super User
LEA/Charter School (all other roles)	LEA/Charter School Security Officer
School (all roles)	LEA/Charter School Security Officer

Description of Roles

CAUTION: Be sure to only approve users based on the type of access they will need. Users who have '**Detail**' access will be able to see student and staff **PII** (Personally Identifiable Information) for the LEA(s) and School(s) for which they are approved.

By default, every user who is approved for the CDW will receive Aggregate access as part of their role, so they do not need to register and be approved for the Aggregate role if they have any other roles. All LEA/Charter Roles provide the user with that level of access to all schools within the LEA.

The table below shows each User Role and what it can access.

User Group/ Role	Aggregate Dashboards	LEA Detail Dashboards	School Detail Dashboards	Oracle Analysis	Validation & Verification
DPI Roles					
DPI Super User	X	X	X	X	
DPI Users Detail	X	X	X	X	
Aggregate (State)	X				
Report Writers	X	X	X	X	
V&V Detail					X
V&V Aggregate					X
LEA/Charter School Roles					
LEA/Charter Security Officer	This role is used solely for approving access to users at the LEA/Charter and School levels.				
LEA/Charter Detail Answers	X	X	X	X	



Purpose

User Group/ Role	Aggregate Dashboards	LEA Detail Dashboards	School Detail Dashboards	Oracle Analysis	Validation & Verification
LEA/Charter Users Detail	X	X	X		
Aggregate (LEA/Charter)	X				
School Roles					
School Users Detail	X		X		
Aggregate (School)	X				

Note: LEA access provides the user with that level of access to all schools within the LEA.

Accessing the CDW Registration System

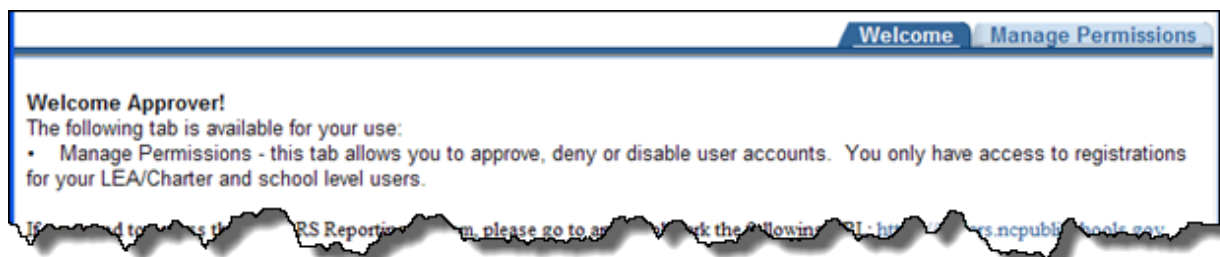
Navigation: <https://schools.nc.gov/reporting>

1. Type your NCID **User Name** and **Password**.

The password is case sensitive and cannot contain an asterisk (*).

2. Click **Login**.

If you have already registered and are in an Approver role, you will see a **welcome** page.



If you have not already registered, follow the instructions to register for your account.

Note: Instructions for registering can be found at <http://www.ncpublicschools.org/cedars/reporting/registration/>



General User Account Management

The following section applies to all Approver roles.

You only see users that your role can approve; therefore, you will not see all users that exist in the system. See the table entitled Who Approves Whom for more information.

As an Approver, you will only manage requests for access to the CDW. Users will enter their NCID credentials to access the system. If you are not the NCID Administrator for your LEA/Charter school, you will not need to manage user names and passwords.

Note: Once the LEA Security Officer is approved by the state, they must then approve any additional roles they have selected in the Registration System.

Approving User Accounts

As an Approver; once a user submits a registration request, you will receive an email with the Subject **Approval Needed - CEDARS Data Warehouse Registration Request**. This email contains the information submitted by the user requesting access so you can make some determination of approval or denial prior to logging into the system.

1. From the Welcome screen, click the **Manage Permissions** tab.

The screenshot shows the 'Manage Permissions' tab selected. At the top, there are tabs for 'Welcome' and 'Manage Permissions'. Below these, there are links for '>Pending Accounts<', 'Active Accounts', 'Disabled Accounts', and 'Denied Accounts'. The '>Pending Accounts<' link is highlighted with a red box. Below the links is a search bar with a magnifying glass icon, a 'Rows' dropdown set to '15', and a 'Go' button. Below the search bar is a table with the following columns: First Name, Last Name, User Name, Email Address, Phone Num, Date Subscribed, Access Code, User Role Code, and User Role Description. The table contains two rows of data:

First Name	Last Name	User Name	Email Address	Phone Num	Date Subscribed	Access Code	User Role Code	User Role Description
Patricia					07/12/2011 07:27AM			LEA/Charter Detail Answers
Julie					07/12/2011 07:53AM			LEA/Charter Detail Answers

The Manage Permissions tab defaults to the **Pending Accounts** listing and provides links to Active Accounts, Disabled Accounts, and Denied Accounts. To approve a new user, verify you are viewing the Pending Accounts list.



2. Click the **Edit** icon



located to the left of the user name to view the detail of the User Account.

The **User Account** tile opens. The information displayed is the same information that was emailed to you.

CAUTION: Be sure you know the user should be authorized to access the CDW for the specified User Role and location. If you are unsure whether to process the request, use the contact information to follow up with the user requesting access.

- a. Click **Approve** or **Deny** as applicable.
3. Repeat Step 2 as needed.

About Approved User Accounts

Once the account is approved, the registration record is removed from the Pending Accounts list and will appear in the **Active Accounts** listing.

The user receives an email from the system indicating the account has been approved. This email also provides instructions on how to access the CDW.

About Denied User Accounts

Important: You must contact the user prior to denying an account. When contacting the user, if it is determined that the account must be denied due to selecting an incorrect User Role, contact the DPI Super User to make the necessary edits using the process provided in the *Requesting User Account Details Updates* section of this document. Once complete, the account can be reactivated.


Once the account is denied, the registration record is removed from the Pending Accounts list and will appear in the **Denied Accounts** and **Disabled Accounts** listings.

A user who is denied access will not receive an email from the CDW Registration System.



Disabling User Accounts

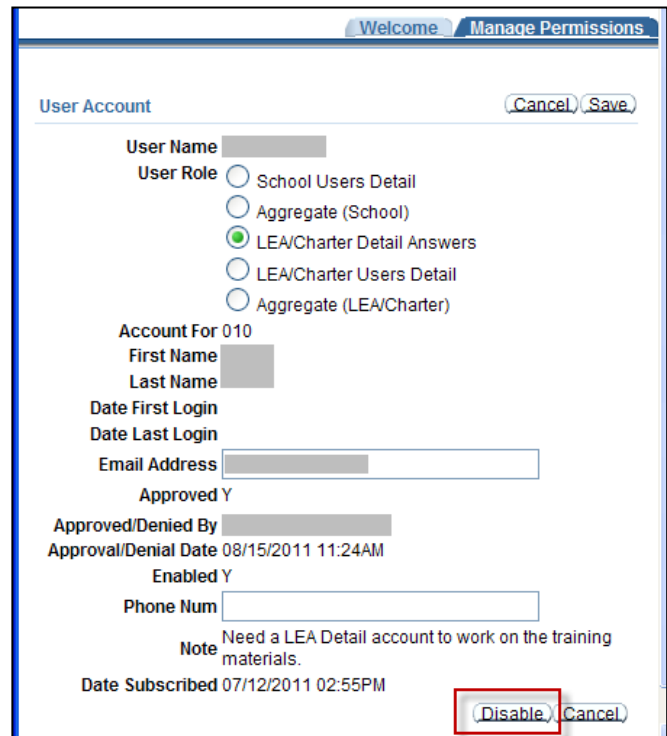
When a user is no longer at your LEA, school or associated with your program, the user account **must** be disabled. By disabling their account you remove their access to the CDW.

1. Navigate to the **Manage Permissions** tab.
2. Click the **Active Accounts** link .
3. Click the **Edit** icon located  to the left of the user to view the detail of the User Account.

The **User Account** tile opens.


4. Click **Disable**.

Once the user account is disabled, the record is removed from the Active Account list and appears in the **Disabled Accounts** listing.



Reactivating User Accounts

Once a user is registered with the system, they can be maintained in the system as Active, Denied or Disabled. When a user needs to be reactivated this can be done by the Approver role listed in the *Who Approves Whom* table or the Super User. If you receive the reactivation request and are not the Approver for that user, use the process provided in the *Requesting User Account Details Updates* section of this document.

1. Navigate to the **Manage Permissions** tab.
2. Click the **Disabled Accounts** or **Denied Accounts** link located in the top right corner.
3. Click the **Edit** icon located  to the left of the user to view the detail of the User Account.

The **User Account** tile opens.

4. Click **Approve**.

Once the account is approved, the record is removed from the Disabled Accounts and/or the Denied Accounts lists and appears in the **Approved Accounts** listing.



Requesting User Account Details Updates

Once a user registers, they do not need to register a second time; the record that exists in the CDW registration system must be updated. There will be times when a user account needs to be edited, such as the LEA/School information needs to change.

1. Send an email to cedars-info@dpi.nc.gov
 - a. Title the subject line: 'CDW Account Update'
 - b. Provide the User Name and detail the changes that need to be made to the account.
 - c. Identify in the email if the account is Active, Disabled or Denied.

Important Information for LEA Security Officers

- Security Officers accounts are managed at the state level. NC DPI must be notified to disable the account when a Security Officer is no longer employed at the LEA.
- As a best practice, it is important to review who has access to the CDW on a regular basis. If accounts are not disabled as staff members accept new positions in other LEAs/Charters or schools, they will still have access to your data due to their NCID credentials. It is recommended that accounts be evaluated at the start of school, close of school and monthly.
- After the initial registration request, users have the ability to register for more than one Program (DPI, LEA/Charter or School) and/or additional Users Roles.
 - An example of a user needing multiple roles is if the user will be managing registration to the system and will also be a user of the CDW. The initial role of **LEA/Charter security officer** will not provide them access to the CEDARS Data Warehouse.
 - Another example of multiple users roles might be: If a School Level user requires the Role 'Aggregate (School)' at school **A**, and requires the Role of 'School User Detail' at school **B**, they must request that specific Role ('School User Detail') for school **B**.
- Approvers can disable users they have approved, but they cannot edit all of the details of the user. In some instances it may be necessary to change a user's Role, LEA or school association if they relocate or change jobs. Only a Super User may change a user's Role, LEA or school association.



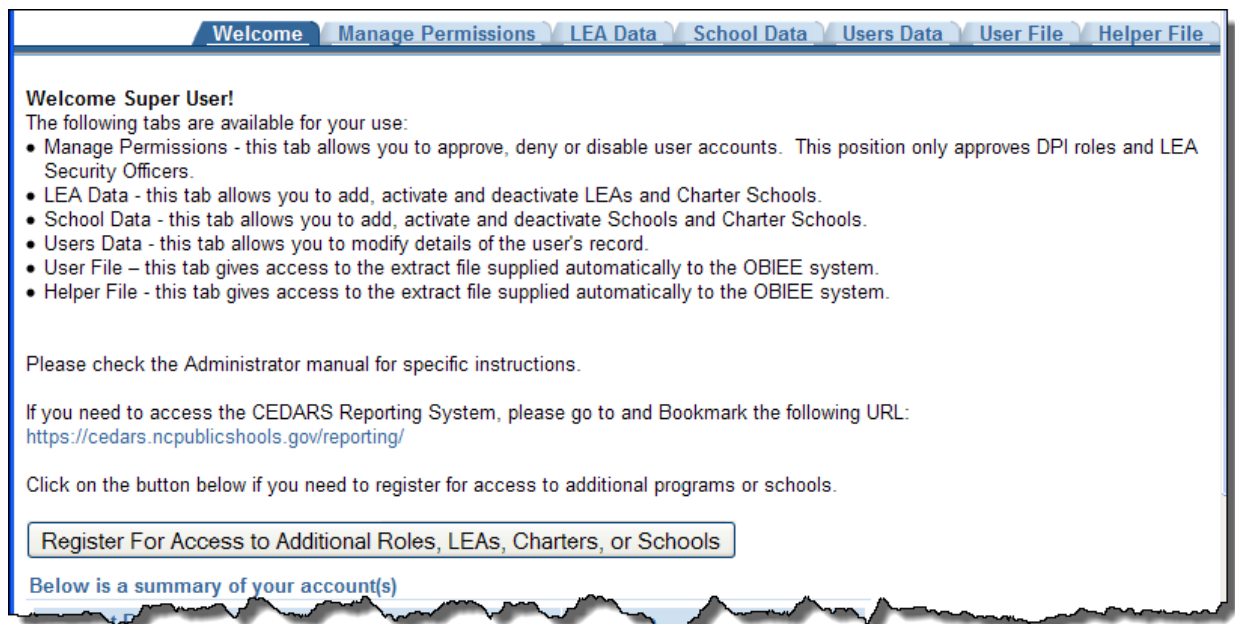
Super User

The Super User Role has general access to the CDW Registration system.

From this system a Super User can:

- Approve, Deny or Disable user accounts
- Edit user account details
- Add new LEAs, Charters or Schools
- Edit LEAs, Charter or Schools
- Create data file downloads

When a Super User logs in the CDW Registration system, by default the system opens to the Welcome tab. Notice from the subsequent image the Welcome screen displays more information and the Super User has access to multiple tabs.





Editing User Account Details

Only a Super User may change a user's Role, LEA or school association. The LEA Security Officer will send a request to the cedars-info@dpi.nc.gov mailbox indicating an update needs to be made.

1. Navigate to the **Users Data** tab.

CEDARS Reporting System User Registration

Welcome Manage Permissions LEA Data School Data **Users Data**

Rows 200 Go

User Id	User Name	User Role Id	First Name	Last Name	Access Code	Email Address	Approved	Approved
4955		4	Ben		037		Y	4836
5199		8	Lee		550		-	-
5201		8	Diane		681		-	-

2. Click the **Edit** icon located to the left of the user to view the detail of the User Account.

The **User Data** tile opens.

3. Edit fields as applicable.
4. Click **Apply changes**.
5. If the change made affects Role or Access Code (LEA and School), Notify the LEA Security Officer that the Role/Access Code has been updated so they can enable, etc. as appropriate.

Welcome Manage Permissions

User Data Cancel Delete **Apply Changes**

User Name

User Role Id 4

First Name Ben

Last Name

Access Code 037

Date First Login

Date Last Login

Email Address

Approved Y

Approved By Id 4836

Approval Date 06/02/2011 08:44AM

Enabled Y

Phone Num 919

Note

Date Subscribed 06/01/2011 03:28PM

Guid efbda57-82a4-49c1-8fe0-0bf5b2179cec



Working with LEA, Charter and School Records

There may be times when it is necessary to edit the details of LEA, Charter or school records.

An Example of a record requiring an edit:

- A name change is requested

There may be times when a new LEA, Charter or school must be added to the CEDARS Registration System.

Examples include:

- New Charter schools as approved by the State Board of Education
- When a LEA, Charter or school changes their number
- When a new LEA is added for State Operated programs

Important: Adding new LEA, Charter and schools records may be required at least once a year, prior the new school year beginning date of July 1.

CAUTION: All LEA, Charter and school records should remain set to **Active** in the CDW Registration system. Only deactive records created in error.

Adding LEA and Charter Records

1. Navigate to the LEA Data tab.

2. Click **Add an LEA**.



The LEA tile opens.



3. Type the **LEA Code** and **LEA Name** into the appropriate fields.

4. Click the **Yes** radio button to **Activate** the LEA.

5. Click **Create**.

The screenshot shows the 'CEDARS Reporting System User Registration' window. At the top right are tabs for 'Welcome' and 'Manage Permissions'. Below the title bar is a section labeled 'LEA' with a 'Cancel' button and a 'Create' button (highlighted with a red box). The form contains the following fields and options:

- Lea Code**: A text input field.
- Lea Name**: A text input field.
- Group**: A set of radio buttons with the following options:
 - ☐ Not In a Group
 - ☐ Eastern Region
 - ☐ Northwest Region
 - ☐ Southeast/Southwest Region
- Active**: A set of radio buttons with the following options:
 - ☐ No
 - ☒ Yes

Important: Add Charters schools as an LEA only. Do not add the Charter schools to the schools tab.

Editing LEA and Charter Records

1. Navigate to the **LEA Data** tab.

2. Click the **Edit** icon located to the left of the user to view the detail of the LEA record.



The **LEA** tile opens.

3. Edit fields as applicable.

4. Click **Apply Changes**.

The screenshot shows the 'CEDARS Reporting System User Registration' window with the 'LEA' tab selected. At the top right are tabs for 'Welcome' and 'Manage Permissions'. Below the title bar is a section labeled 'LEA' with a 'Cancel' button and an 'Apply Changes' button (highlighted with a red box). The form contains the following fields and options:

- Lea Code**: A text input field containing '24N'.
- Lea Name**: A text input field containing 'Columbus Charter School'.
- Group**: A set of radio buttons with the following options:
 - ☐ Not In a Group
 - ☐ Eastern Region
 - ☐ Northwest Region
 - ☐ Southeast/Southwest Region
- Active**: A set of radio buttons with the following options:
 - ☐ No
 - ☒ Yes

CAUTION: All LEA, Charter and school records should remain set to **Active** in the CDW Registration system. Only deactive records created in error.



Adding School Records

1. Navigate to the **School Data** tab.

CEDARS Reporting System User Registration

Welcome Manage Permissions LEA Data **School Data**

Search Rows 15 Go Add a School

School Code	Lea Code	School Name	Active	Lea Name
761321	761	Donna L Loflin Elementary	Y	Asheboro City Schools

2. Click **Add a School**.
The **School** tile opens.

3. Type the six digit **School code** and **School Name** into the appropriate fields.

CEDARS Reporting System User Registration

Welcome Manage Permissions LEA Data **School Data**

School Cancel Create

School Code

School Name

Lea Code SELECT LEA

Active ☐ No ☐ Yes

4. Click the **Yes** radio button to **Activate** the LEA.
5. Click **Create**.

Editing School Records

1. Navigate to the **School Data** tab.
2. Click the **Edit** icon located to the left of the user to view the detail of the school record.
The **School** tile opens.
3. Edit fields as applicable.
4. Click **Apply Changes**.





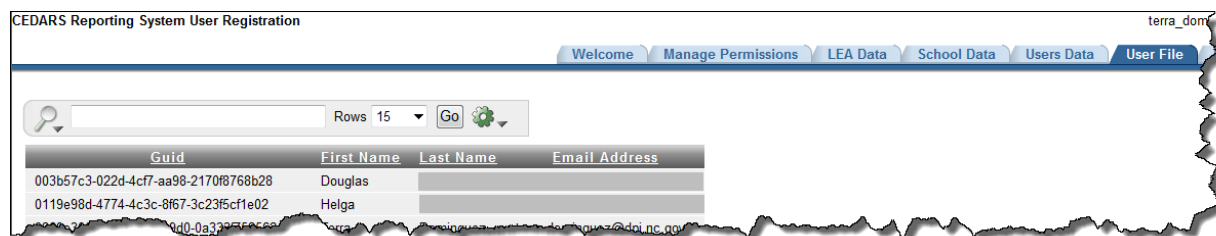
Data File Downloads

The data files are system-generated files created periodically based on changes or additions. In general the system creates the files, and provides them to the CEDARS Data Warehouse automatically. In the event some part of the creation and transport of the file is not working properly, the file can be created manually.

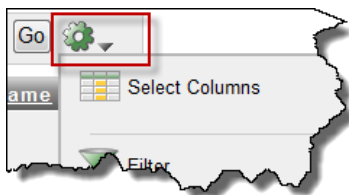
Important: Both the User File and the Helper File must be provided together.

Downloading the User File

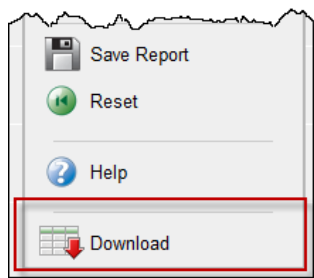
1. Navigate to the **User File** tab.



2. Click the **Gear** icon.

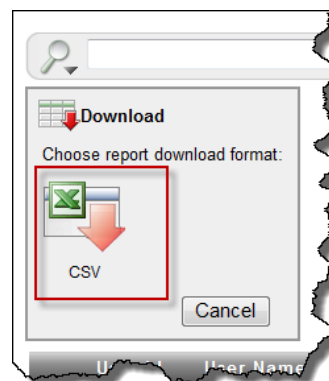


3. Click **Download** from the menu.



The Download tile opens.

4. Click the **CSV** icon to begin the download.



5. If you are prompted by your web browser to accept the download, click **Yes** or **Accept**.
6. Save the file to the appropriate location.



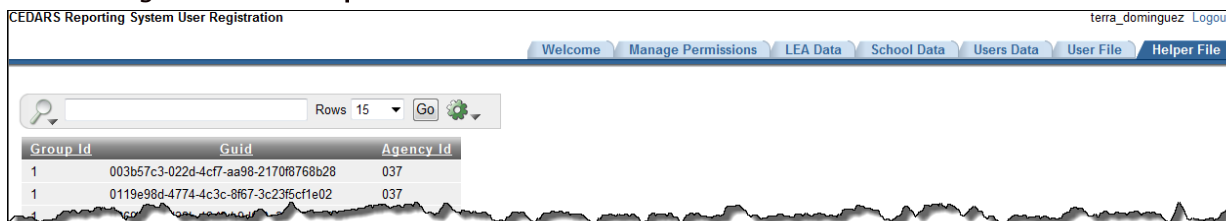
- a. Update the file name to the following: **CDWR-YYYYMMDDHHMISS-00-2218-DWMGT-user.txt**

Note: YYYY is the four digit year, MM is the two digit month, DD is the two digit day, HH is the two digit hour, MI is the two digit minute, SS is the two digit second.

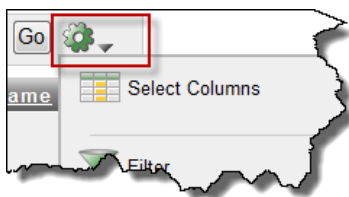
7. Send the file to your System Administrator.

Downloading the Helper File

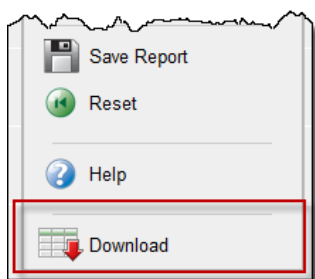
1. Navigate to the **Helper File** tab.



2. Click the **Gear** icon.

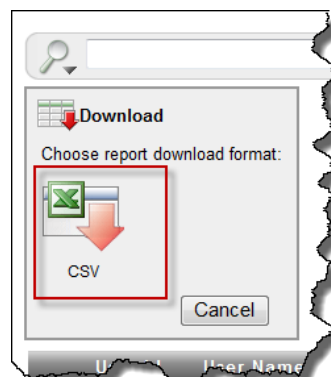


3. Click **Download** from the menu.



The Download tile opens.

4. Click the **CSV** icon to begin the download.





5. If you are prompted by your web browser to accept the download, click **Yes** or **Accept**.
6. Save the file to the appropriate location.
 - a. Update the file name to the following: **CDWR-YYYYMMDDHHMISS-00-2218-DWHL-
-help.txt**

Note: YYYY is the four digit year, MM is the two digit month, DD is the two digit day, HH is the two digit hour, MI is the two digit minute, SS is the two digit second.
7. Send the file to your System Administrator.

Logging Out

Once you have no further actions to take in the system, be sure to use the **Logout** link located at the top right corner of each screen.

terra_dominguez Logout
