SpringMath Data Admin Guide

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Data Admin Permissions

The SpringMath Data Admin is a district-level role; it is not specific to one school. Permissions for this role include:
- Importing and exporting rosters
- Managing staff accounts
- Adding, moving, archiving students
- Clearing or editing scores entered by teachers
- Exporting SpringMath data
- Importing external data
- Setting up SSO and auto-roster

Set up single sign-on

If your district uses Classlink or Clever, you can set up a Single Sign-on for staff members who are using SpringMath.

1. Within Classlink or Clever, there is a catalog of available applications to add to the district's offerings.
2. Look for SpringMath and ready it by configuring the permissions.
3. Find your district's ID
   - In Classlink, it is called the Tenant ID
   - In Clever it is called the District ID

4. Login to SpringMath as Data Admin and enter your ID here:
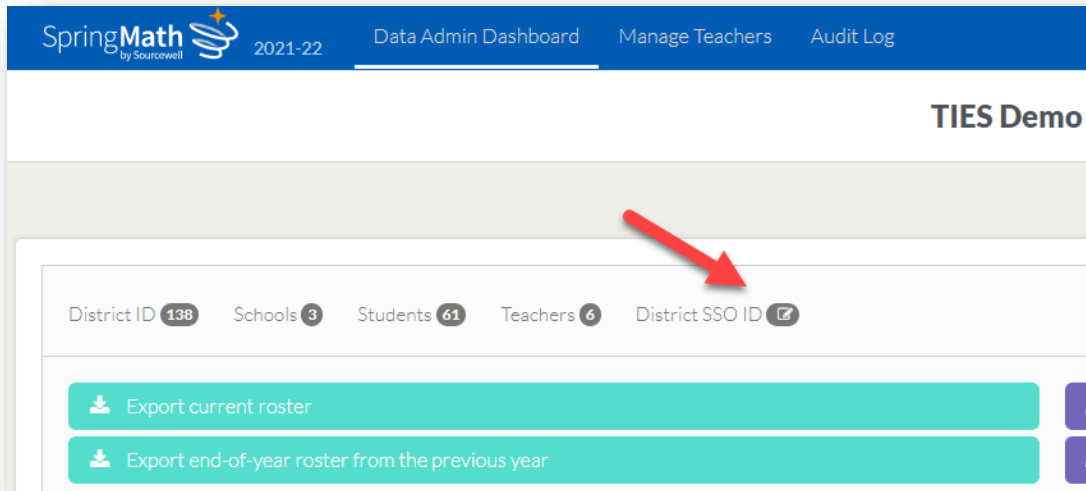
Import Student & Teacher Roster

The import function requires a CSV file (comma separated values), which you can compile manually or pull from your student information system. The roster file consists of fields related to the School District, School, Teacher, Class, Student and SpringMath Grade. (See required fields on the next page.)

Important Notes about Roster Preparation:

- All columns are required information

- Do not change the column headers

- Students can only be in one class

- There can only be one teacher and Grade Level per class section

- Students in grades 9-12 must be at a separate school from students in grades K-8

Required Fields

| Field Name	Data Type	Description
DistrictID	Numeric	has to be the same value for all records in the roster file
DistrictName	Text	has to be a single value for all records in the roster file
SchoolID	Numeric	multiple school IDs are allowed in a single roster file
SchoolName	Text	one school name per SchoolId allowed
TeacherID	Text or numeric	only one ID is allowed per teacher, but multiple teacher IDs are allowed in a roster file; a teacher can be assigned multiple ClassSectionIDs
TeacherLastName	Text	last name should be the same for all records of a given teacher ID
TeacherFirstName	Text	first name should be the same for all records of a given teacher ID
TeacherEmail	Email	email address must follow standard convention; teacher email should be the same for all records of a given teacher ID
ClassName	Text	a value must be present for all records, only one ClassName per ClassSectionID
ClassSectionID	Text or numeric	should only contain student records from a single SpringMathGrade; can only be assigned to a single TeacherID and a single ClassName; ClassSectionIDs must be unique within a given school
StudentLocalID	Text or numeric; no leading zeros	each student record must have a unique Local ID; once established in the SpringMath database a student record's StudentLocalID cannot be changed
StudentStateID	Text or numeric; no leading zeros	each student record must have a unique State ID; once established in the SpringMath database a student record's StudentStateID cannot be changed
StudentLastName	Text	a value must be present for all records, but have no specific restrictions
StudentFirstName	Text	a value must be present for all records, but have no specific restrictions
StudentBirthDate	Date mm/dd/yy	a value must be present for all records
SpringMathGrade	K or 1 – 12	a value of K (kindergarten) or 1 through 12 must be present

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New Districts

If your district is **new** to SpringMath, click **Import Records** and then **Download CSV Template for File Uploads**. Leave the column headers as they are. All fields are required. When your file is prepared this is also where you will go to import the roster.
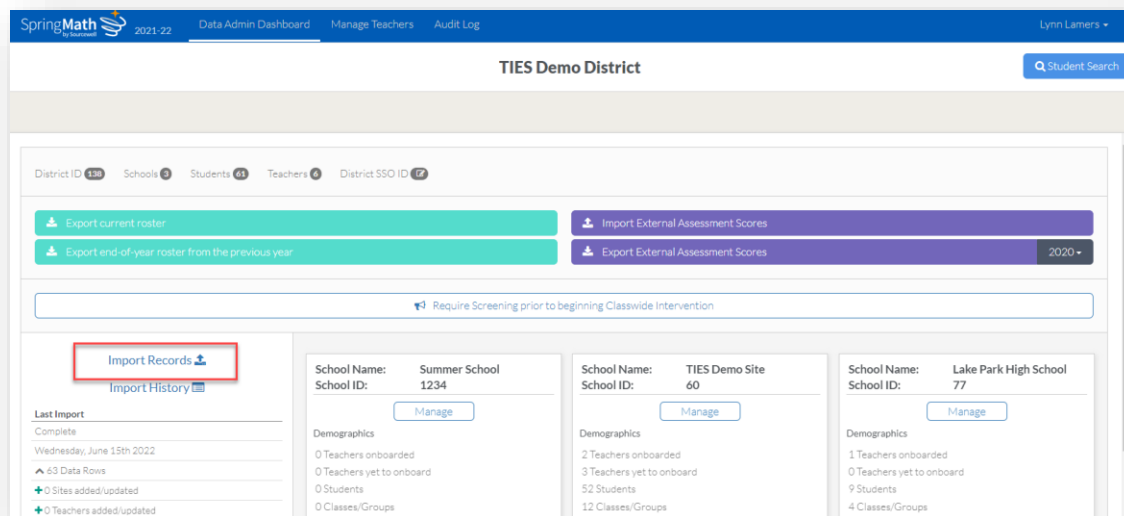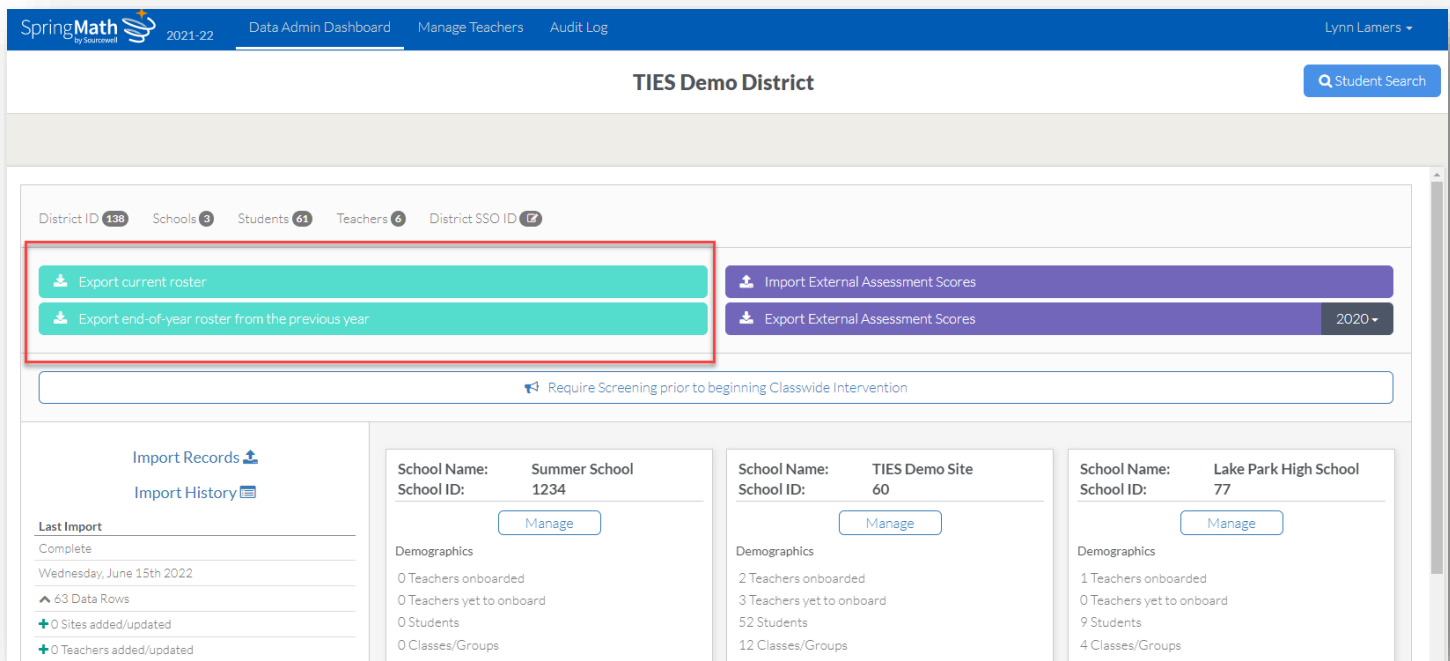

Returning Districts

If your district has already been using SpringMath, click **Export end-of-year roster from the previous year** (for a Fall import) or **Export Current Roster** (for a mid-year import).

**This step is <u>imperative</u> for two reasons:

1. To start the year, it will help ensure you are keeping District, School and Teacher names and IDs the same as the previous year. Changing any of those, even inadvertently, will create new organizations and users.

2. Mid-year, it will help to ensure you do not overwrite or orphan data already in the system. Example: If you decide to add a new school mid-year and try to only upload that school, it would delete the existing school(s). You will get an error message if you try to do this, and will not be able to continue without assistance from Sourcewell Tech.

When you are ready to import your roster, login as Data Admin and click **Import Records**.

A new page will open. Read over the guidelines to make sure your roster is ready-to-go. When you are satisfied, click the green box to select your file or drag it into the box.

If there are any problems with your roster, you will see error messages appear. Make the necessary corrections to your file and try the upload again. Once it is error-free, you'll see a summary of the number of schools, students and teachers you are about to upload. If those numbers look correct, click **Finalize Upload**.

Sending email invitations
(Note: If using Single Sign-On, you can skip this step.)

After successfully uploading the roster, you'll need to send email invitations to any new teachers so that they can create a login. Click the ***Manage Teachers*** tab. Teachers are listed under the school name with which they are associated. To send or resend an individual invitation, click the blue **Send Invite** button. If you need to send out multiple invitations at once, check the boxes to the left of the teachers' names and then select the **Send Invites to Selected** button.

Tip! If teachers do not get to the invitation right away, the link will expire. So that you don't have to continuously resend, just let teachers know they can go to app.springmath.org, enter their email address and click "forgot password." That will trigger the system to resend the link.
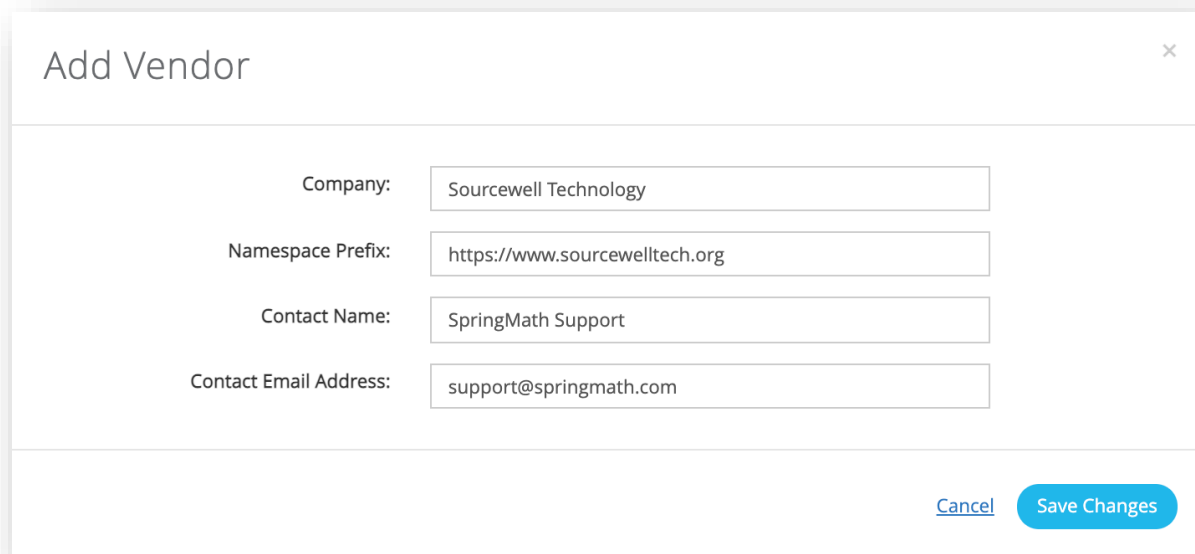
Auto Rostering

SpringMath has the ability to connect to [Ed-Fi](#) and [OneRoster](#) for easy setup and maintenance of class rosters. Below are the details on how to connect and import the appropriate roster data into SpringMath.

Ed-Fi

Step 1: Create Vendor

Creating a vendor in Ed-Fi helps with keeping track of the various usages of your instance of Ed-Fi. The following steps help set up a new vendor in Ed-Fi for Sourcewell Technology. In the **Global** section of the Ed-Fi admin panel, select **Add Vendor**. Below is an example with the fields filled out with the information for Sourcewell Technology.
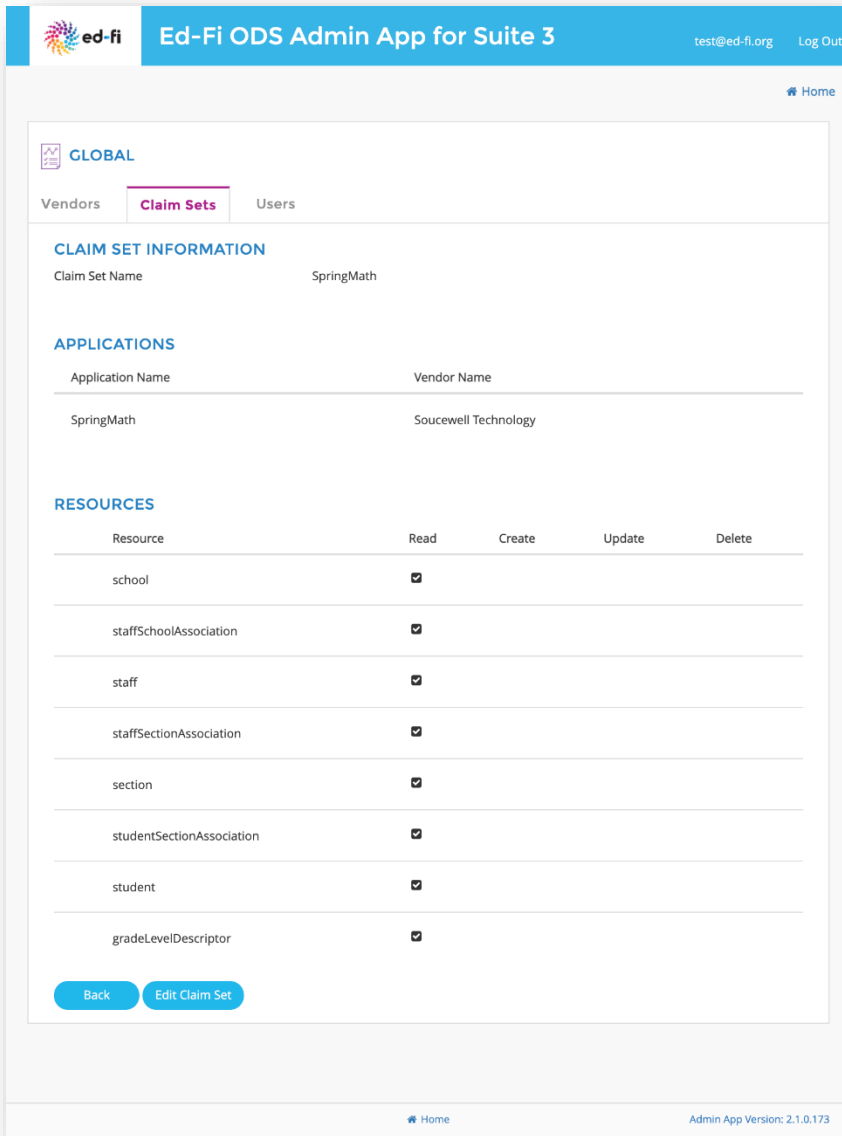
Once a new vendor has been created, you are now ready to move to step 2 and create a Claims Set.

Step 2: Create Claim Sets

The proper resources need to be granted to SpringMath. In short, resources are grouped types of data. The resources provided to SpringMath should only be read permissions. The specific resources SpringMath needs are: **school**, **staffSchoolAssociation**, **staff**, **staffSectionAssociation**, **section**, **studentSectionAssociation**, **student**, and **gradeLevelDescriptor**. SpringMath does not write any data to Ed-Fi. In the **Global** section of the Ed-Fi admin panel, select the **Claim Sets** tab. Once in the Claim Sets tab, select **Add Claim Set**. and give the new claim the name of 'SpringMath'. Below is an example claim set used by SpringMath.
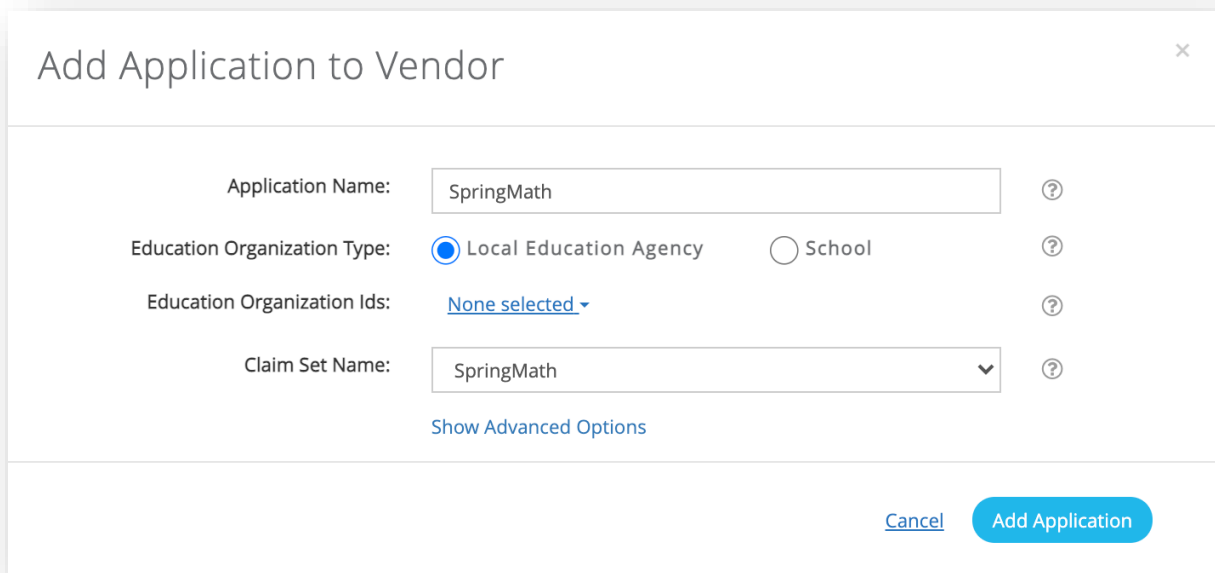
Once the SpringMath claim set has been created you can move to step 3 and create the Client Id and Secret SpringMath will use to connect to your instance of Ed-Fi.

Step 3: Creating an Application

An application in Ed-Fi should be created under the appropriate vendor. A vendor application is used to create the connection information needed for SpringMath. A vendor application in Ed-Fi also uses a claim set for the permissions to any data in Ed-Fi. This step will help guide you through creating the Client Id and Secret in Ed-Fi for SpringMath to use when connecting SpringMath to your instance of Ed-Fi.

From the main landing page in the Ed-Fi admin select Settings, or from within the Global section of the Ed-Fi admin panel, select Define Applications. Find the "Vendor: Soucewell Technology" section. This is the vendor that was created in Step 1. Under the Vendor: Soucewell Technology section, select Add Application. Below is an example for the values

![SpringMath by Sourcewell logo]

when adding an application. Be sure to select the appropriate *Education Organization Ids.* Also be sure to select the SpringMath Claim Set Name we created in Step 2.

Once the application information is filled out, select **Add Application**. The next screen to appear will contain the Key (i.e. Client Id), Secret, and API URL that will be used to enter into SpringMath. This information should not be shared with anyone and should not be saved anywhere after entered into SpringMath. If necessary, a new Key/Secret can be generated at any time.

Congratulations! You are now ready to open SpringMath and enter the Client ID and Secret. Proceed to the *Creating a Connection in SpringMath* section for instructions to enter the connection information into SpringMath and begin the rostering process.

OneRoster

OneRoster is a data standard specification. SpringMath currently supports version 1.1 of the OneRoster API. Auto rostering with OneRoster is dependent upon the source of your OneRoster. A common host (i.e. vendor) for a OneRoster instance is a Student Information System. Other common hosts (i.e. vendor) for a OneRoster instance are ClassLink or RapidIdentity. SpringMath does not currently have an integration with Clever.
Please contact your OneRoster vendor for directions on how to create OneRoster API credentials (Client Id/key and secret) and the URL for use by SpringMath.

These are the API endpoints SpringMath uses in the OneRoster specifications:

- /schools
- /schools/{sourcedId}/classes
- /schools/{sourcedId}/teachers
- /schools/{sourcedId}/enrollments
- /schools/{sourcedId}/students
- /schools/{sourcedId}/demographics

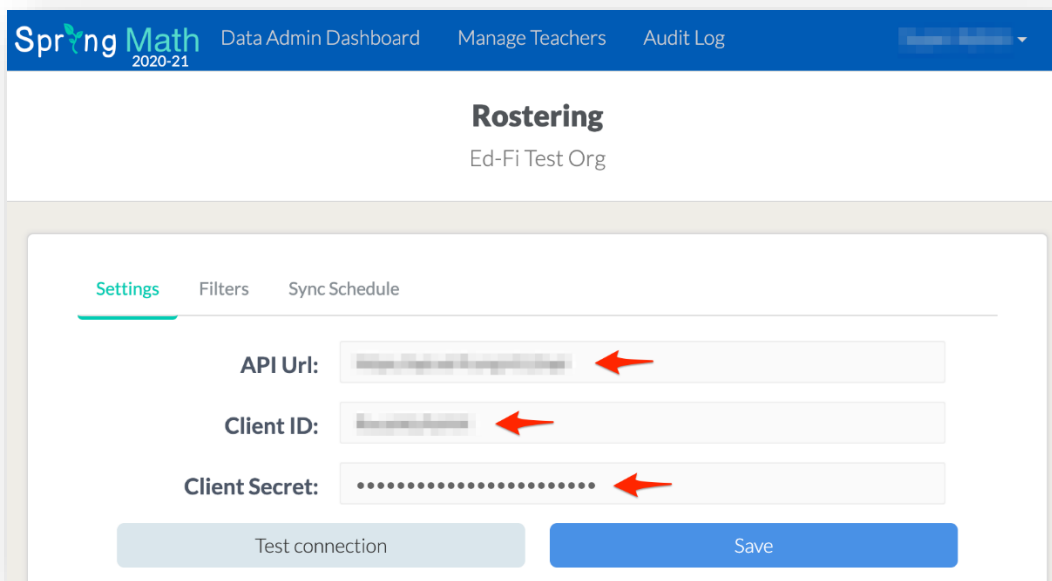*Creating a Connection in SpringMath*
Connecting to Ed-Fi or OneRoster

Adding Ed-Fi or OneRoster connection information into SpringMath can only be done by a Data Admin user in SpringMath. Creating a connection between SpringMath and Ed-Fi or OneRoster saves time for district staff that would otherwise be used managing roster information. Connecting SpringMath to an auto rostering solution is an easy process and, once connected, will automatically adjust class rosters in SpringMath based on the information in Ed-Fi or OneRoster.

To begin connecting SpringMath to Ed-Fi or One roster, navigate to the Ed-Fi or OneRoster management screen by clicking on the appropriate link on the left of the Data Admin Dashboard.
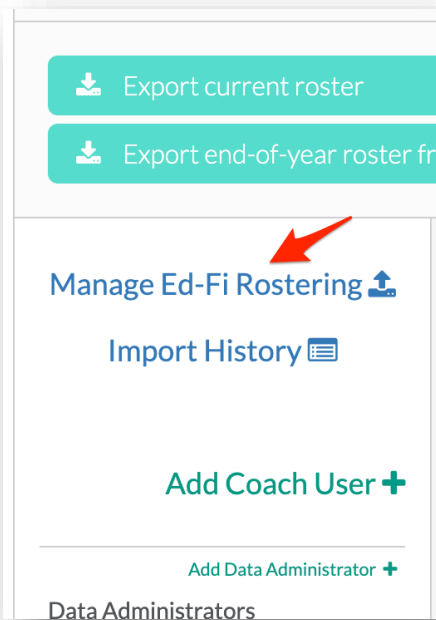
On the Settings tab of the Rostering page in SpringMath, you'll need to enter the API URL, Client ID (i.e. key), and Client Secret for your district's instance of Ed-Fi or OneRoster.

Once all the information is entered, select **Test Connection**. Testing the connection does 2 things: first, it tests that SpringMath is able to connect and authenticate into Ed-Fi / OneRoster and second, it checks for the appropriate permissions to the specific API end points. You are now ready to select the class rosters to import into SpringMath as described in the *Set Roster Filters* section below.

Set Roster Filters

Once the connection to Ed-Fi or OneRoster has been successfully tested, select the **Filters** tab. The filters are meant to provide a way of narrowing down the classes to a manageable list to select from. The filters work in a cascade fashion. Start by selecting the Schools SpringMath will be used in by moving the selected schools from the left to the right side of the page. Once all of the desired schools are on the right side of the page select **Apply**. Applying the filter will render the appropriate values in the next filter. In the example below, only teachers/classes/etc. in the elementary and middle schools will be shown in the next set of filters.

The last filter is Classes. Notice the *Search...* boxes at the top of each selection. The search box can be used to quickly find a specific entry in the corresponding selection box. The **Preview** button allows you to view the classes that will be queried from Ed-Fi or OneRoster. Use the preview to verify the roster values that will be imported into SpringMath.
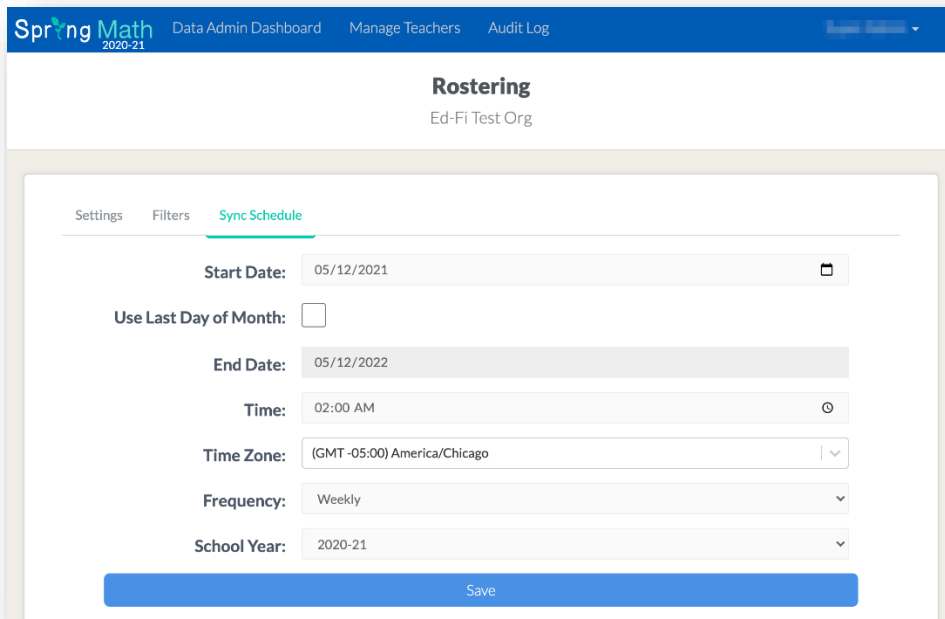
After the filters have been saved, the roster can be immediately imported into SpringMath by selecting Import Now, or you can continue on to setting up the sync schedule.

The sync schedule will use the saved filters to query Ed-Fi or OneRoster at each execution of the set schedule.

Set Sync Schedule
After a connection to Ed-Fi or OneRoster is established and the filters for the roster have been saved, you are ready to create the schedule you would like to have the roster updated in SpringMath.
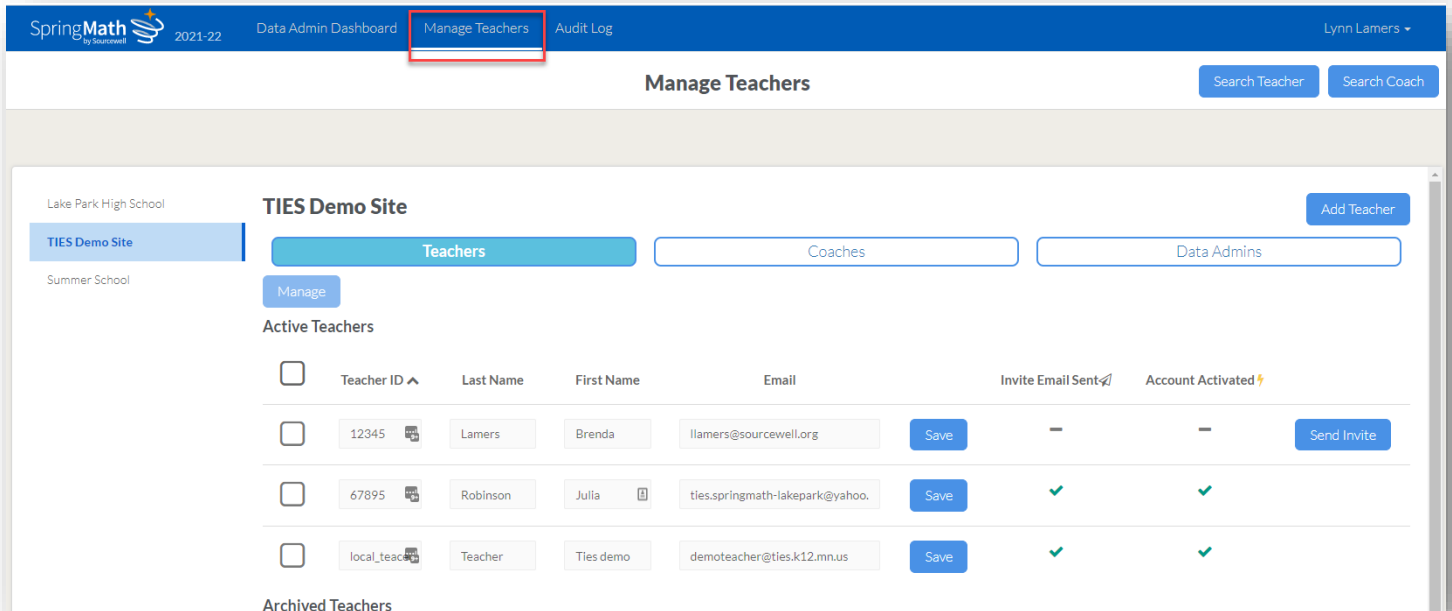
Select a **Start Date** in the near future that you want the sync to begin on. The **End Date** is automatically set to stop the sync 1 year after the Start Date. The **Frequency** allows the sync to run either Daily, Weekly, or Monthly. If it's desired to run monthly on the last day of each month, check the option for **Use Last Day of Month**. The **School Year** should be set to the school year that the schedule will be running.

Manage Staff Accounts

There are several things you can do from the **Manage Teachers** tab.

Search for Coach or Teacher

This allows you to search across the district to find the school that a staff member is assigned to.

Check status to see if account is activated

Look for a checkmark under the column header "Account Activated" to know a staff member has created their account and signed in.

Update teacher information

Click into the field you need to edit, and click **Save** when you are done editing.

Add a New Teacher

At some point in the year, you may need to assign a new teacher to an existing class or add a second teacher to a class. To do so, click the **Add Teacher** button and provide the teacher name, ID and email address. You must choose a class to assign the teacher to, and choose whether the teacher will be the primary or secondary teacher of the selected class.

Note: This functionality is just for adding a teacher to an <u>existing</u> class. If you need to add a teacher <u>and</u> add a class, that is done on a different screen. Please see **Add Class and Teacher** on the next page.

Add Class and Teacher

From the *Data Admin Dashboard*, click the **Manage** button on the school where you will add the new class. Click **Add Class & Teacher**.
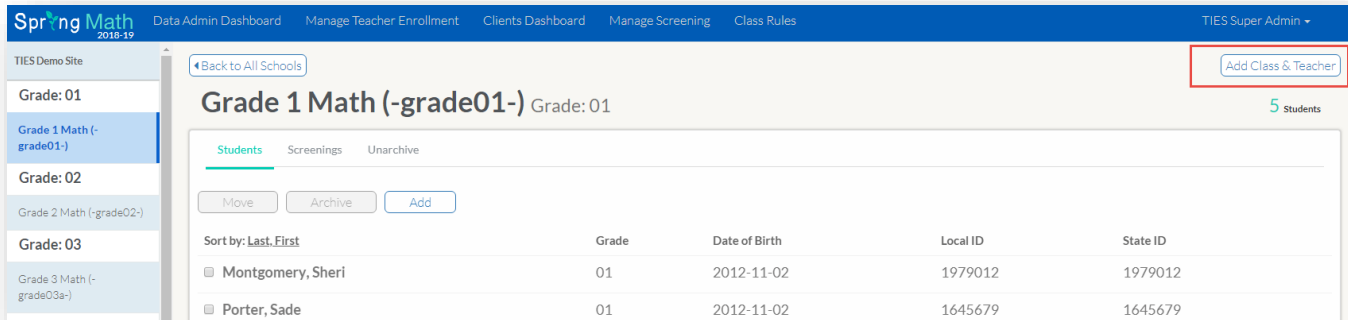
Use the next screen to enter the Class Name, Class Section ID, Grade and Teacher. Note that from the Teacher drop-down menu, you have the option to choose an existing teacher for this class or add a new teacher. If you select Add Teacher, a new box will appear for you to enter Last Name, First Name, Local ID and Email.

The next screen will allow you to upload a .csv of the students in the class. Use the template that is provided on the page to create your file. Or, if it's a small class. you also have the option of manually entering each student.

Add a Second Teacher to a Class

To add a second teacher to an existing class, select the class from the navigation panel on the left, and then click the **Manage Class** tab. Look for the button *Add new secondary teacher*. You can either select an existing teacher or create a new teacher account.

Add a Coach

The Coach role allows a staff member to do several things:

1. View class and individual data for every class at the school(s) to which they are assigned.
2. Perform all the same functions as a teacher (conduct Benchmark Screenings, Classwide Interventions and Individual Interventions), for all classes in the school(s) to which they are assigned.
3. Schedule individual interventions for students regardless of whether SpringMath has recommended they be in an individual intervention.

4. Access the Coach Dashboard, which includes class and student intervention statistics and information regarding intervention consistency.

Coaches can be added or deleted as shown here:
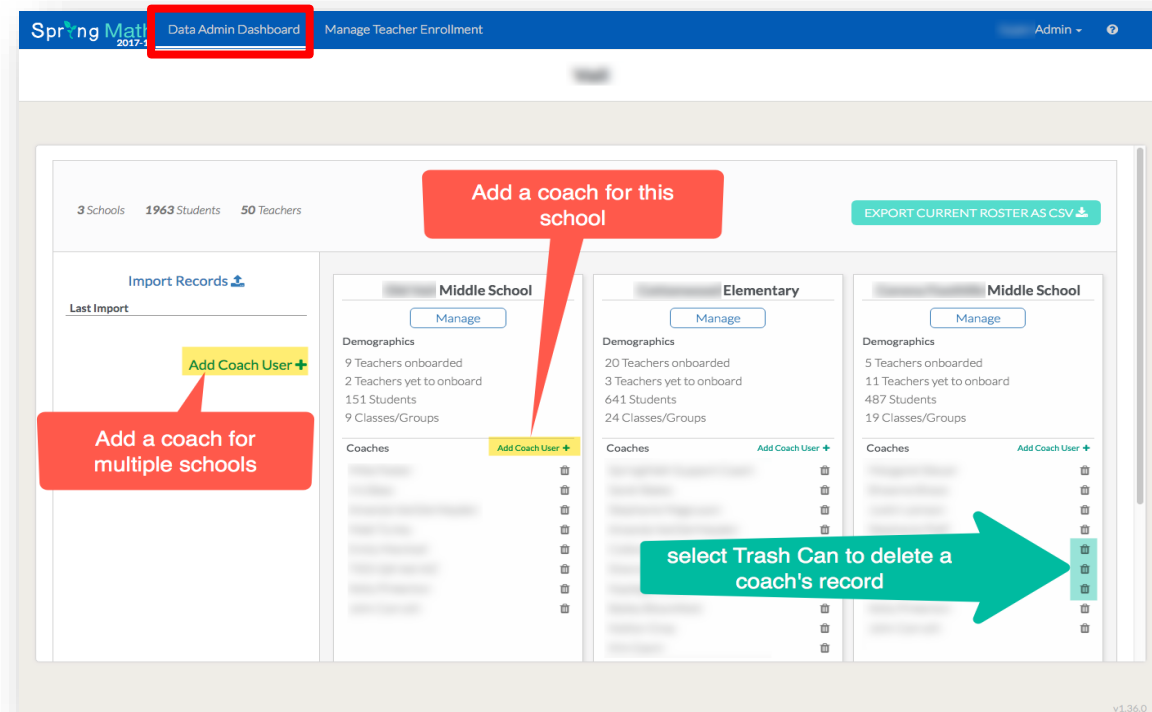
Update Your Roster

Throughout the year, you will likely have students move in and out, necessitating an update to your SpringMath roster. This can be done by uploading a new .csv file or by adjusting the roster manually within the application.

Update Roster with New CSV

⚠️You **must** start this process by using your current roster. FAILURE TO DO THIS WILL RESULT IN DELETING THE CURRENT STUDENTS AND THEIR DATA. From the Data Admin Dashboard, click the **Export Current Roster as CSV** button to download your current roster. Add the new students onto this roster, keeping the current students on it as well. Make sure you don't make any changes to the following, or you will create duplicates:

- District Name

- District ID
- School Name
- School ID

Double-check to make sure you left the current students intact, and did not make any changes to the data on the current roster, other than adding in new students. When you are satisfied, upload the roster, by clicking **Import Roster.**
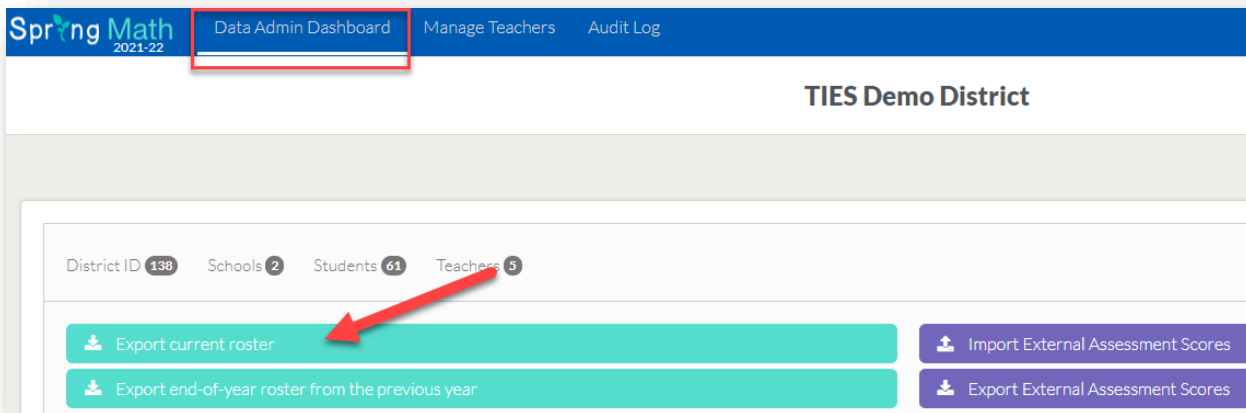
Update Roster Manually

When you have just a few edits to make, it may be more efficient to update the roster manually. Use the **Manage** button on the ***Data Admin Dashboard***. The screenshots below will show how to perform these updates.
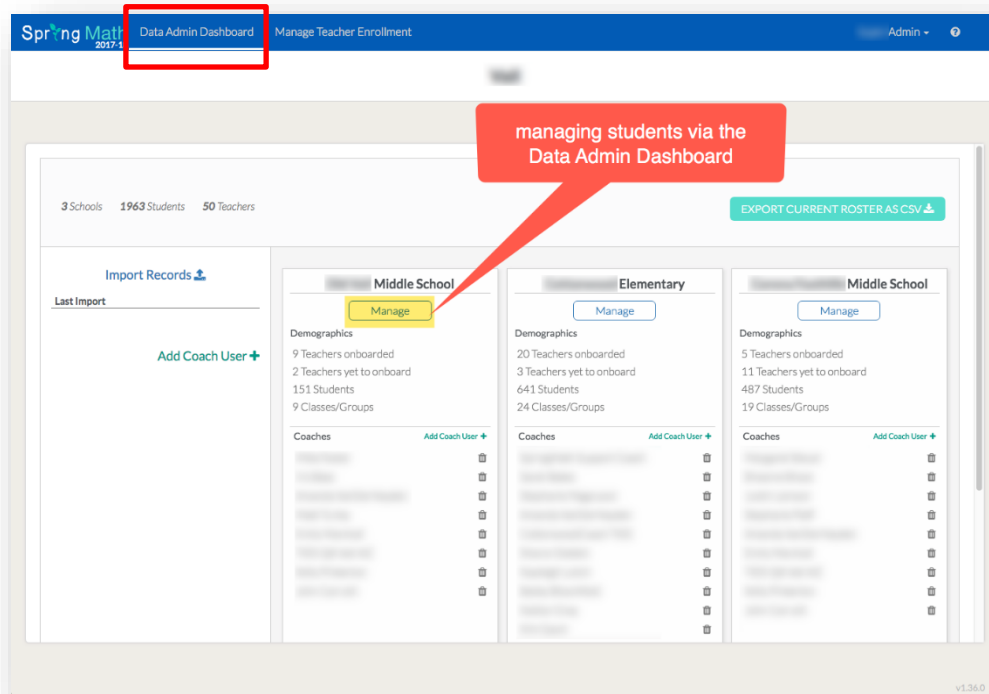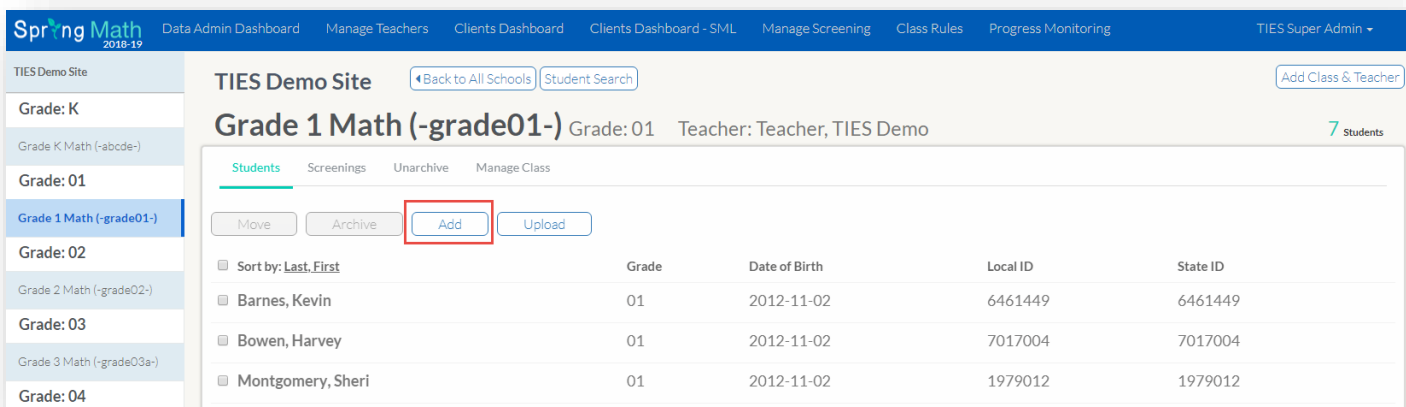
Add Students

There are two methods for adding students to a class:

Add Students One-at-a-Time

From the ***Data Admin Dashboard***, click the **Manage** button. Select the class name you need from the left navigation pane. Click the **Add** button. Complete the information for the student(s) you are adding to that class. Note: you must have the StudentLastName, StudentFirstName, Date of Birth, StudentLocalID and StudentStateID to successfully add a new student. The new student must also have a unique Local and State ID. Click **Save** when you are finished.

Add Students via Upload

From the ***Data Admin Dashboard***, click the **Manage** button. Select the class name from the left navigation pane where you want to add new students. Click the **Upload** button.

Using the template on the upload page, prepare a .csv file of the students you want to add to *this particular class.* This template is different from the one you use for a full school/district upload and is specific to this task. The only information needed is:
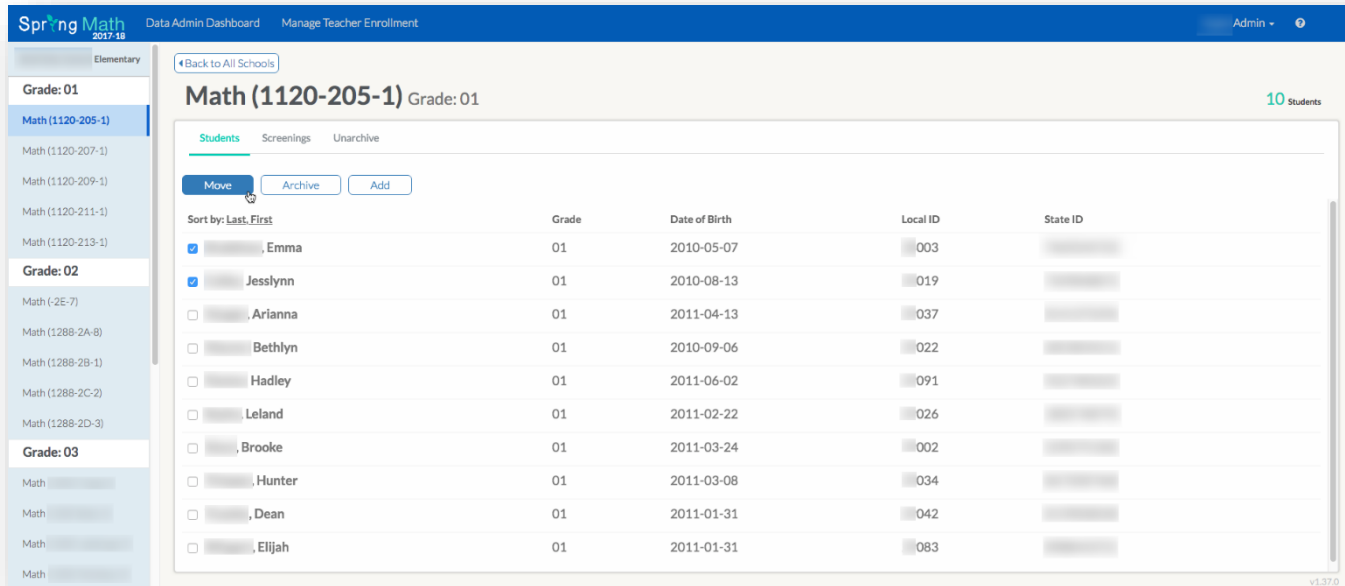
- Student Local ID
- Student State ID
- Student Last Name
- Student First Name
- Student Birth Date
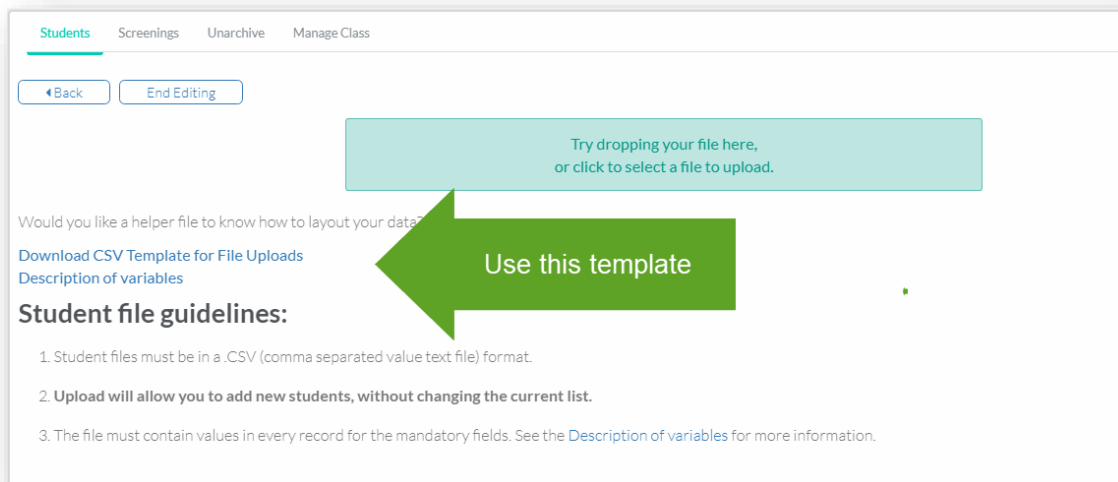
When you have completed the roster, click the green box to select the file for upload.

Move students

If you need to move students to a different class or building, you can do so from the *Data Admin Dashboard*. Click **Manage**. Use the left navigation pane to find the class in which the students are currently rostered. Select the student(s) that you want to move, and click the **Move** button.

A **Move Students** dialog will pop up and show a list of buildings and classes that the students can be moved to. This list includes <u>all classes</u> from all grades within the school you select, so choose carefully. After choosing the appropriate class, click the **Move Students** button. The students will be moved to the class selected.

Archive students

Archiving is a way of inactivating students. It removes students from every user's view, except the Data Admin, and it preserves their data. From the *Data Admin Dashboard*, click the **Manage button.** From the navigation pane on the left, select the class in which the student is currently enrolled. Check the box in front of the student's name and then click the **Archive** button.

A warning dialog will appear asking you to confirm that you want to archive the selected student(s). Select **Yes, archive** or **No, Cancel**. If selecting Yes, you will receive a confirmation message that the student has been successfully archived.

Unarchive Students

If you find that you need to add an archived student back to a class, use the **Manage** button on the *Data Admin Dashboard.*

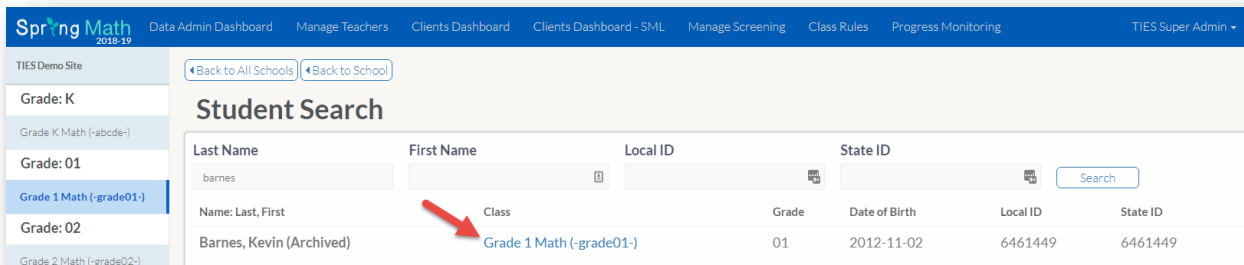Use the *Student Search* button to find the student who was previously archived.

When you find the student, click on the Class Name to be taken to the screen for that class.
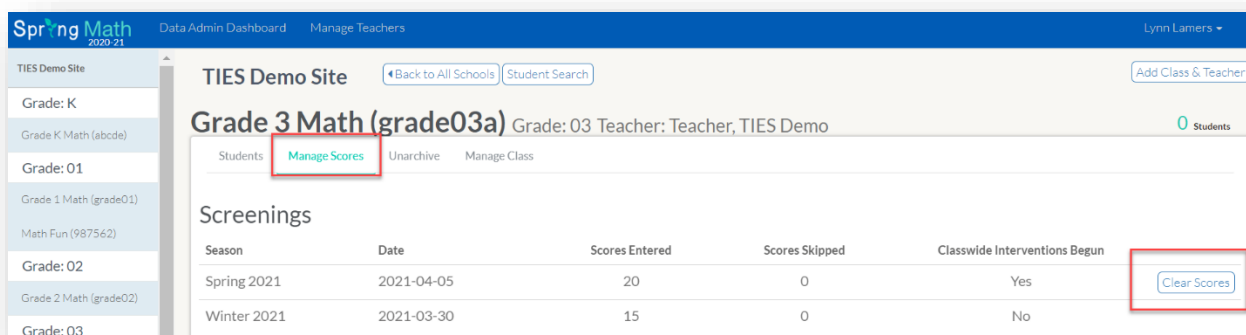

Check the box in front of the student's name. The **Move** button will then become active. When you click **Move**, a list of all the classes in the school will appear, in addition to a drop-down list of other schools in the district. Select the school and class to which you need to assign the student.

Manage Scores

If teachers discover they made data entry errors with screening or intervention scores, the Data Admin has the ability to clear some scores and edit others. Before proceeding, please make sure the teacher has a record of the scores since he/she will need to re-enter them.

Clear Screening Scores

From the blue navigation bar on the left, navigate to the needed class and then click the ***Manage Scores*** tab. Under Screenings, you will see a button to **Clear Scores**. This will clear all of the most recent screening scores entered for the class, so be sure the teacher understands he/she will have to re-enter them all. Note that this option only appears for the most recent scores. In the example below, there is no option to clear scores from the previous season.

Clear or Edit Intervention Scores

Also on the **Manage Scores** tab, you will see the option to edit or clear scores for Classwide Intervention and Individual Intervention. Click *Edit Scores* to open the text boxes containing student scores and adjust the scores as needed. Click *Clear Scores* if the teacher just needs to start over with score entry. Like with screening scores, these options only apply to the most recently entered scores; you will not be able to go back to previous skills or scores.
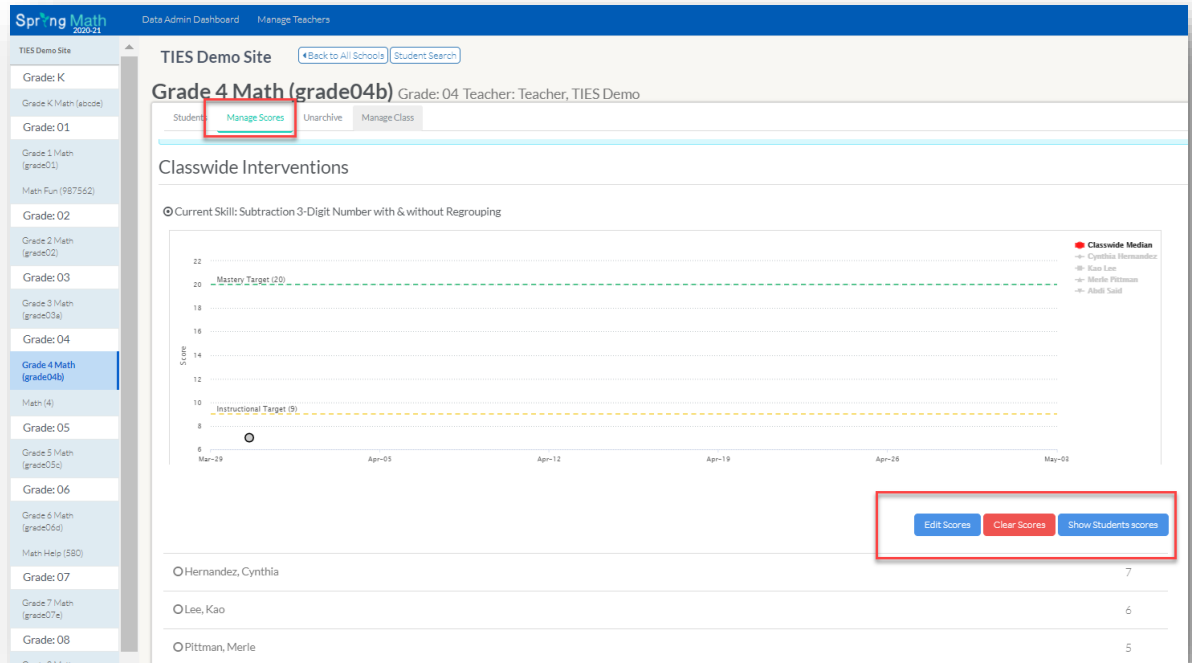
Export
SpringMath Data

This functionality allows you to export SpringMath data for uploading to another system, such as a SIS or data aggregator.

Logged in as Data Admin, use the drop-down menu in the upper right corner to select *Export Scripts*.
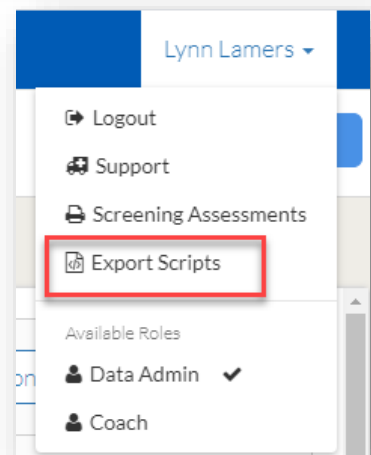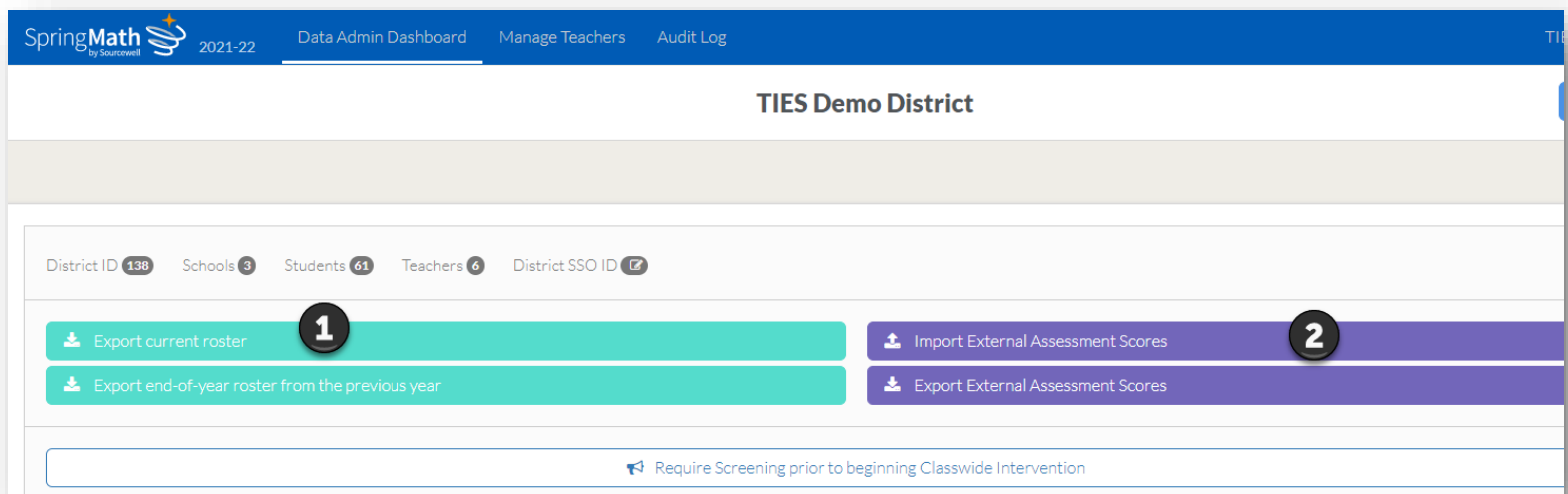
From the next screen, choose the type of data you want to export and then the school year. Click **Generate CSV** after making your selections.

Import External Scores for use in Program Evaluation

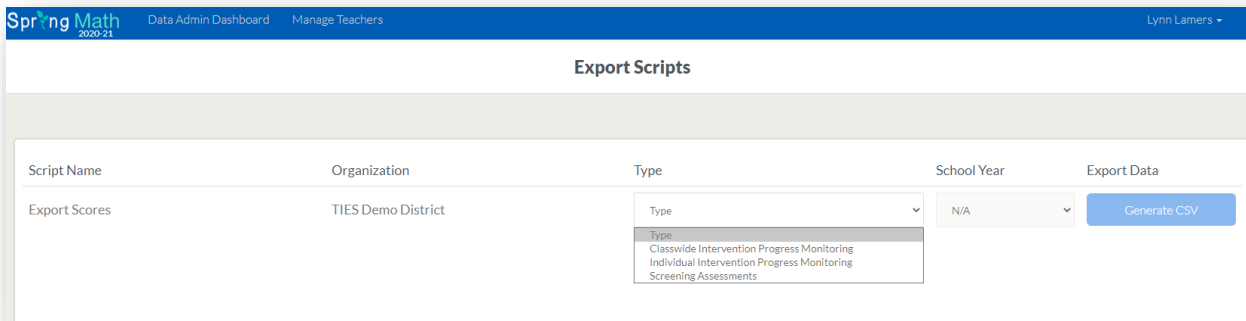Data admins are able to import and export external assessment scores from their data admin dashboard. This process is very similar to importing rosters.

The recommended process is:

1. From the Data Admin Dashboard click on the green bar to export the current roster (or EOY roster from the previous year to import scores for the prior year).

2. Click on the purple bar to Import External Assessment Scores and then open the CSV Template for File Uploads.

3. From the current roster copy the StudentLocalID, StudentStateID, StudentLastName and StudentFirstName, and paste them into the CSV Template for File Uploads.

4. Merge in the state or local assessment information for these students. A description of the assessment score fields is provided just below the link to Download CSV Template. They are also on the next page of this document.

5. Your final file may look something like this. The first four columns are required. Since not every organization will have state and district assessments, these fields can be left blank.

	StudentLo	StudentSt	StudentLa	StudentFir	Assessme	StateAsse	StateAsse	StateAsse	StateAsse	DistrictAss	DistrictAss	DistrictAss	DistrictAss	DistrictAssessment	SpringProficient
11	9290	569290	Kraushaar	Regina	2022	MCA	680	Yes	80	MAP	78	No	88	Yes	
12	9291	569291	Lipford	Elizebeth	2022	MCA	690	Yes	90	MAP	80	Yes	90	Yes	
13	9292	569292	Marengo	Dovie	2022	MCA	650	Yes	50	MAP	81	Yes	91	Yes	
14	9293	569293	Mcneilly	Warren	2022	MCA	655	Yes	55	MAP	82	Yes	92	Yes	
15	9294	569294	Pettey	Rickie	2022					MAP	83	Yes	93	Yes	
16	9295	569295	Pfeifer	Dusti	2022					MAP	84	Yes	94	Yes	
17	9280	569280	Blansett	Donovan	2022					MAP	86	Yes	95	Yes	
18	9281	569281	Chaffin	Delena	2022					MAP	90	Yes			
19	9282	569282	Englert	Barbie	2022					MAP	92	Yes			
20	9158	569158	Jellison	Lucienne	2022	MCA	333	No	33	MAP	321	No	322	No	
21	9161	569161	Leibowitz	Trisha	2022	MCA	333	No	33	MAP	321	No	322	No	
22	9330	569330	Riche	Stephania	2022	MCA	333	No	33	MAP	321	No	370	Yes	
23	9331	569331	Silverman	Ike	2022	MCA	333	No	33	MAP	365	Yes	370	Yes	
24	9332	569332	Vowels	Bernadine	2022	MCA	333	No	33	MAP	365	Yes	372	Yes	
25	9150	569150	Brinkerho	Berta	2022	MCA	350	Yes	50	MAP	365	Yes	374	Yes	
26	9153	569153	Dockins	Willene	2022	MCA	351	Yes	51						
27	3232	4545343	Bobby	B	2022	MCA	352	Yes	52						
28	9151	569151	Burkhart	Tomika	2022	MCA	353	Yes	53						
29	9164	569164	Mee	Reynaldo	2022	MCA	354	Yes	54						
30	9152	569152	Cogdill	Deeann	2022	MCA	321	Yes	21	MAP	333	No			
31	9154	569154	Drew	Sueann	2022	MCA	322	Yes	22	MAP			311	No	
32	9155	569155	Hunkins	Delmar	2022	MCA	322	Yes	22	MAP			311	No	
33	9156	569156	Isaman	Shalanda	2022	MCA	341	Yes	41						

6. Once your assessment file is ready, drag it to the green box or click on the box to select your file location.

7. If your file is accepted without errors, you will get a congratulations notice. When uploading an external file to a district or school with existing scores the new file will <u>delete and replace the prior data</u>. If you want the new file to add to the existing file instead of replacing it, click on the check box before clicking on the blue box to finalize your upload.

Notes:

• If your data file includes scores for students who are not on the exported SpringMath roster you will get an error message.
• If an assessment name is included, at least 1 corresponding score is required.
• Data admins can upload external scores for a subset of their roster.
• If a new upload has scores for a student who already had scores entered previously, the prior data will be overwritten.