

# District-level Data Certification Setup and Workflow

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This article explains the general workflow for setting up and using Data Validation and Certification. Select links within each step for detailed information about the tools described throughout the workflow.

**Data Integrity Tools are only available in State Editions of Campus and districts connected to a State Edition of Campus.**

This article includes the following topics:

- [Pre-Data Certification Setup](#)
- [Data Validation Setup and Workflow](#)
- [Data Certification Setup Workflow](#)

## Pre-Data Certification Setup

Prior to using Data Certification, the following must be set up:


- [Ensure Email Messenger is Enabled and Configured](#)
- [Assign Data Integrity Tool Rights](#)
- [Assign Filter Designer Tool Rights](#)
- [Ensure Users Have a Valid Email Address](#)

### Ensure Email Messenger is Enabled and Configured

Tool Search: Email Settings

Users must ensure [Email Messenger](#) is enabled and configured for the district. District users receive email notifications as Data Certification Events and Types are published and certified.

**Email Settings** ☆ Communication > Messenger Settings > Email Settings

 Save

**Basic Settings**

\*Default Sender Email Address

☒ Use Mailgun API ☐ Use SMTP Server

\*Mailgun Domain

**Advanced Settings**

Minutes Between Retries

Max Errors Before Cancel

Throttle Email Messages  emails per second (leave blank to not throttle)

**Email Attachment Settings**

Allow Email Attachments ☐

**Global Email Settings**

Use Sender's Email from Census as Reply To Email Address ☐

Allow Custom Reply To Email Address ☐

Allow Custom Sender Display Name ☐

**Test Email Settings Configuration**

Send Test Email

## Assign Data Integrity Tool Rights

Location: User Management > User Account Administration > User Account > Individual Tool Rights > Modify Tool Rights

District users must be given tool rights to the appropriate Data Integrity Tools to view and certify events properly.

**User Tool Rights Editor**  
TESTxBB

	ALL	READ	WRITE	ADD	DELETE
▼ Data Certification	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Certification Category	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Event Dashboard	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Snapshot Scheduler	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Type Setup	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Type Membership Setup	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Event Setup	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Event Admin Membership Setup	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Event Report	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
▼ Data Validation	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Stored Procedure Setup	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Validation Rules	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Validation Groups	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Data Validation Report	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
▶ KY State Reporting	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete

## Assign Filter Designer Tool Rights

Location: User Management > User Account Administration > User Account > Individual Tool Rights > Modify Tool Rights


Users must have tool rights to the Filter Designer and State Owned Filters sub-right to view data certification event data sent by the state in Ad hoc filter form.

User Tool Rights Editor					
TESTxBB					
Set Task Expiration	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Set Task Priority	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Export	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Warehouse: Allow live data as source	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Viewer	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Filter Designer	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Warehouse: Allow live data as source	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Pass-through SQL Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Query Wizard Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Selection Editor Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
User Group Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
State Owned Filters	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
Publish Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Import Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Export Filters	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Letter Builder	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Data Warehouse: Allow live data as source	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Letter Designer	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
User Group Formats	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Pivot Designer	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete

## Ensure Users Have a Valid Email Address

Tool Search: Demographics

Users must enter a valid email address on the Demographics tab to receive email notifications about data certification event activity.



Demographics ☆

Helen J

Staff #:

DOB:

Save

Delete

Person Summary Report

Demographics Data

Person GUID

Portal Username

No Active Portal Account

Personal Contact Information

Other Phone

Private

Work Phone

Private

Cell Phone

Private

Pager

Private

Email

Private

Secondary Email

Private

Home Phone (Household phone)

Address Line 1

City

Address Line 2

State

Zip

Preferred Language

Comments

test@email.com

1441 Fake Street

Lexington

Lexington, KY 40514

KY: Kentucky

40514

en\_US: US English

- Modified by: Unknown

## Data Validation Setup and Workflow

The following steps define the basic workflow for setting up Data Validation tools so that users can begin to validate state and district data.

Steps 1-3 relate to creating and managing your own district-level definitions. If you wish to use only State-defined, pre-populated definitions, please start with Step 4.

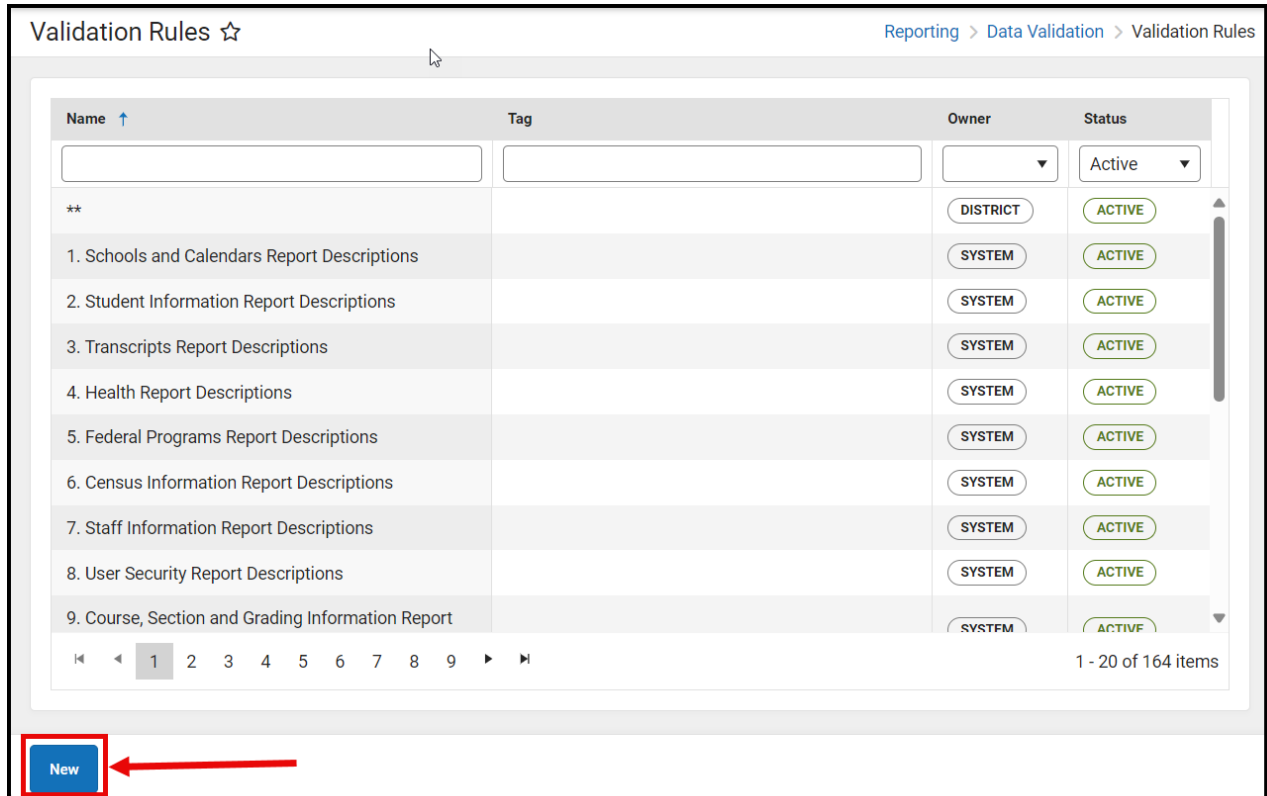
- [Step 1 - Establish Data Validation Definitions](#)
- [Step 2 - Create Data Validation Groups](#)
- [Step 3 - Export Data Validation Definition/Group Data](#)
- [Step 4 - Run Data Validations at the State](#)

## Step 1 - Establish Data Validation Rules

Tool Search: Validation Rules

Data validation rules must be established for district users to validate data. Data validation rules define how data is audited during the validation process.

Users can create their own validation rules and/or use the pre-existing rules provided by Campus. State-linked district users may also receive definitions published (as part of a group) from the state, which can be run but not modified.



Validation Rules ☆ Reporting > Data Validation > Validation Rules

Name ↑	Tag	Owner	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	Active ▾
**		DISTRICT	ACTIVE
1. Schools and Calendars Report Descriptions		SYSTEM	ACTIVE
2. Student Information Report Descriptions		SYSTEM	ACTIVE
3. Transcripts Report Descriptions		SYSTEM	ACTIVE
4. Health Report Descriptions		SYSTEM	ACTIVE
5. Federal Programs Report Descriptions		SYSTEM	ACTIVE
6. Census Information Report Descriptions		SYSTEM	ACTIVE
7. Staff Information Report Descriptions		SYSTEM	ACTIVE
8. User Security Report Descriptions		SYSTEM	ACTIVE
9. Course, Section and Grading Information Report		SYSTEM	ACTIVE

1 - 20 of 164 items

**New**

## Step 2 - Create Data Validation Groups

Tool Search: Validation Groups

Data validation groups must be established once data validation definitions are created and tested. Data validation groups are sets of validation definitions grouped together so users can easily validate data for a specific area or process within Campus. Users can add user-created and Campus-created definitions to definition groups.

For example, a user might create a validation group called "Student Graduation Validations" and include several validation definitions pertaining to graduation information.

State-linked districts may also receive definition groups published by the state. These groups are read-only but can be generated and tagged locally.

Once data validation groups are established, users should generate each group locally and review results via the [Definition Group Extract](#) tool.

Validation Groups ☆
Reporting > Data Validation > Validation Groups

Name ↑	User Groups	Owner	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	Active ▾
**		District	<span>ACTIVE</span>
1. Schools and Calendars		System	<span>ACTIVE</span>
2. Student Information		System	<span>ACTIVE</span>
3. Transcripts		System	<span>ACTIVE</span>
4. Health		System	<span>ACTIVE</span>
5. Federal Programs		System	<span>ACTIVE</span>
6. Census Information		System	<span>ACTIVE</span>
7. Staff Information		System	<span>ACTIVE</span>
8. User Security		System	<span>ACTIVE</span>
9. Course, Section and Grading Information		System	<span>ACTIVE</span>

⏪ ⏩ 1 2 ⏪ ⏩
1 - 20 of 22 items

New

## Step 3 - Export Data Validation Definition and Group Data

Tool Search: Data Validation Report

Once data validation groups have been reviewed, users should locally export the results of data validation groups or definitions via the [Data Validation Report](#).

Data Validation Report ☆
Reporting > Data Validation > Data Validation Report

Instructions

The Data Validation Report returns results from the Data Validation Group selected. The Summary section includes the number of occurrences for each Data Validation Rule; if a Baseline Rule is used its Total population will be returned along with the Rate of the primary Rule compared against the Baseline Rule. State Owned Data Validation Groups can be run against the State Dataset via DIS.

Report Options

Data Validation Group \*

Report Data Source  
☒ Local Dataset  
☐ State Dataset

Output Options

Report Processing  
☒ Generate Now  
☐ Submit to Batch Queue

Format Type  
☒ HTML  
☐ CSV

Batch Queue List

Start Date  
End Date

Generate Reset

## Step 4 - Run Data Validations Using State Data

Tool Search: Data Validation Report

Once data validation groups are validated locally, users should generate the extract for the group using state data.

Data Validation Report ☆
Reporting > Data Validation > Data Validation Report

Instructions

The Data Validation Report returns results from the Data Validation Group selected. The Summary section includes the number of occurrences for each Data Validation Rule; if a Baseline Rule is used its Total population will be returned along with the Rate of the primary Rule compared against the Baseline Rule. State Owned Data Validation Groups can be run against the State Dataset via DIS.

Report Options

Data Validation Group \*  
3. Transcripts

Data Validation Group Description  
This is a set of reports used to audit errors on transcripts impacting GPA and credits.

Report Data Source  
☐ Local Dataset  
☒ State Dataset

Output Options

Report Processing  
☐ Generate Now  
☒ Submit to Batch Queue

Format Type  
☒ HTML  
☐ CSV

Queue Options

Generate Reset

# Data Certification Setup Workflow

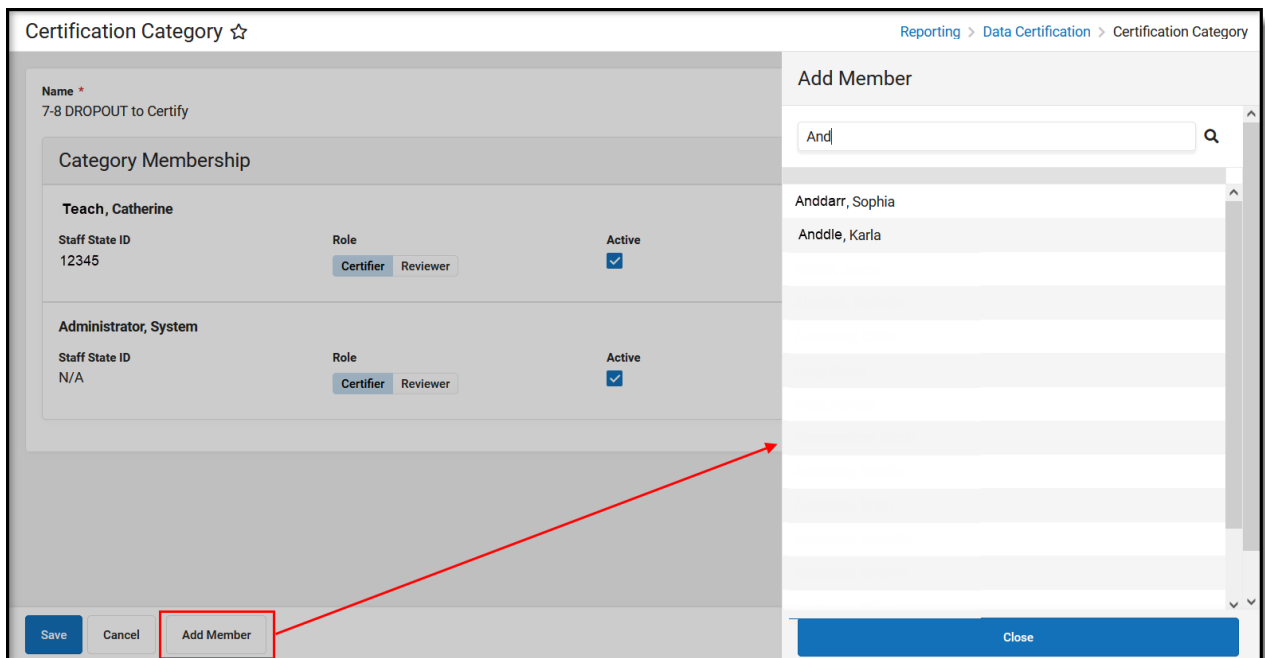
The following steps define the basic workflow for setting up Data Certification tools so that users can begin creating and approving data certification events.

- [Step 1 - Assign Members to Each Certification Category](#)
- [Step 2 - Certify and Submit Data Certification Events](#)
- [Step 3 - Re-certify Data Certification Events](#)

## Step 1 - Assign Members to Each Certification Category

Tool Search: Certification Category

Once all precertification setup is complete, districts must assign members to each certification category sent from the state. This ensures district users can view and certify events sent from the state.



## Step 2 - Certify and Submit Data Certification Events

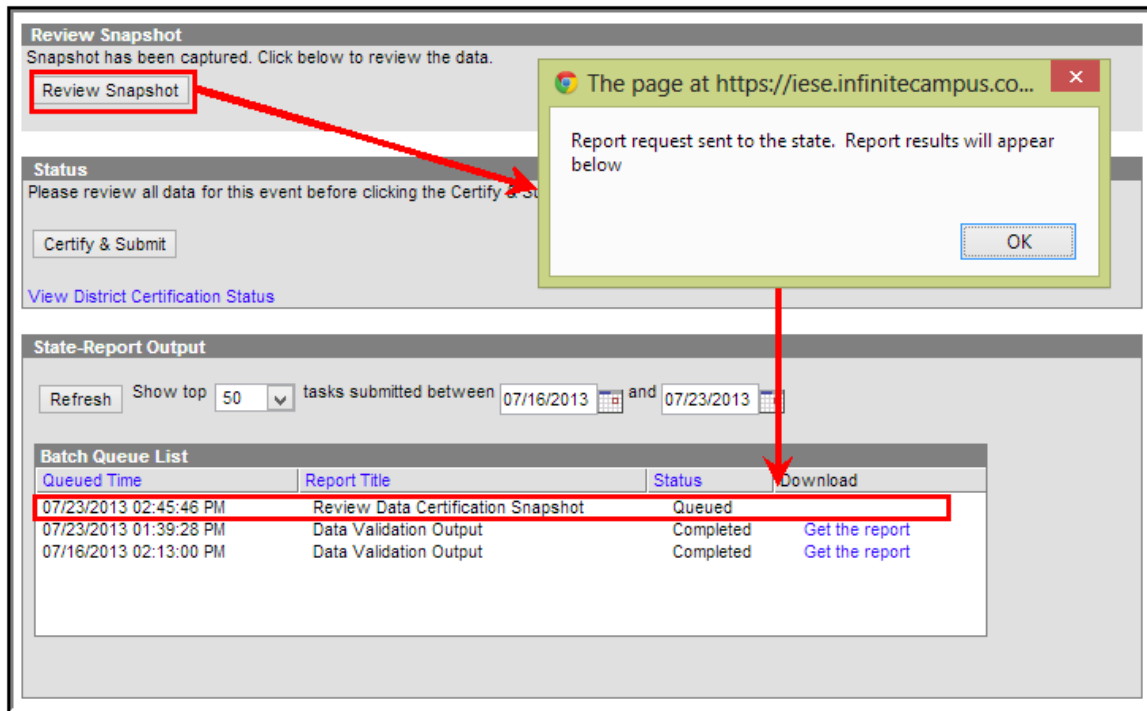
Tool Search: Event Certification

As events are sent from the state, a district user with the appropriate tool rights and Type Membership(s) must certify and submit the event via the [Event Certification](#) tool.

From here, users can also view group validation data and review snapshot data for the event.

Users cannot select the **Certify and Submit** button unless the date is within the Certification Opens timeframe.





## Step 3 - Re-certify Data Certification Events

Tool Search: Event Certification

Once a district has certified an event, the state reviews the event and determines if the event should be approved. If the state does not approve of the certified data for a district, they can request a re-certification of the event. When this occurs, users with the appropriate [Type Memberships](#) receive an email and Process Inbox message indicating the event requires recertification.

If an event is sent back for recertification, any recurring snapshots established by the state will continue to overwrite existing snapshot data until the district certifies the event.

	Process	Name	Posted Date	Due Date
<input type="checkbox"/>	Data Certification	<a href="#">The State of SD published a Data Certification Event: TEST111</a>	08/08/2012	
<input type="checkbox"/>	Data Certification	<a href="#">The State of SD published a Data Certification Event: TEST111</a>	08/08/2012	
<input type="checkbox"/>	Data Certification	<a href="#">The State of SD requested a recertification for Data Certification Event: Event 2</a>	08/02/2012	
<input type="checkbox"/>	Data Certification	<a href="#">The State of SD requested a recertification for Data Certification Event: LEP and SPED Counts</a>	08/02/2012	
<input type="checkbox"/>	Data Certification	<a href="#">The State of SD published a Data Certification Event: LEP and SPED Counts</a>	08/02/2012	

Once the event has been reviewed and all necessary data changes are made at the district level, the district should then certify and submit the event back to the state via the [Event Certification](#) tool.

Event Description: kjlkj

External Data Links:

Ad Hoc Data Links:

Data Validation Groups:

**Review Snapshot**  
Snapshot has been captured. Click below to review the data.

**Status**  
Please review all data for this event before clicking the Certify & Submit button.

[View District Certification Status](#)

**State-Report Output**  
 Show top 50 tasks submitted between 05/23/2014 and 05/30/2014  

Batch Queue List
Queued Time      Report Title      Status      Download