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

PATH: *System Administration > Messenger > Messenger Preferences > Email Settings*

Users must ensure Email Messenger is enabled and configured for the district. As Data Certification Events and Types are published and certified, district users receive email notifications.
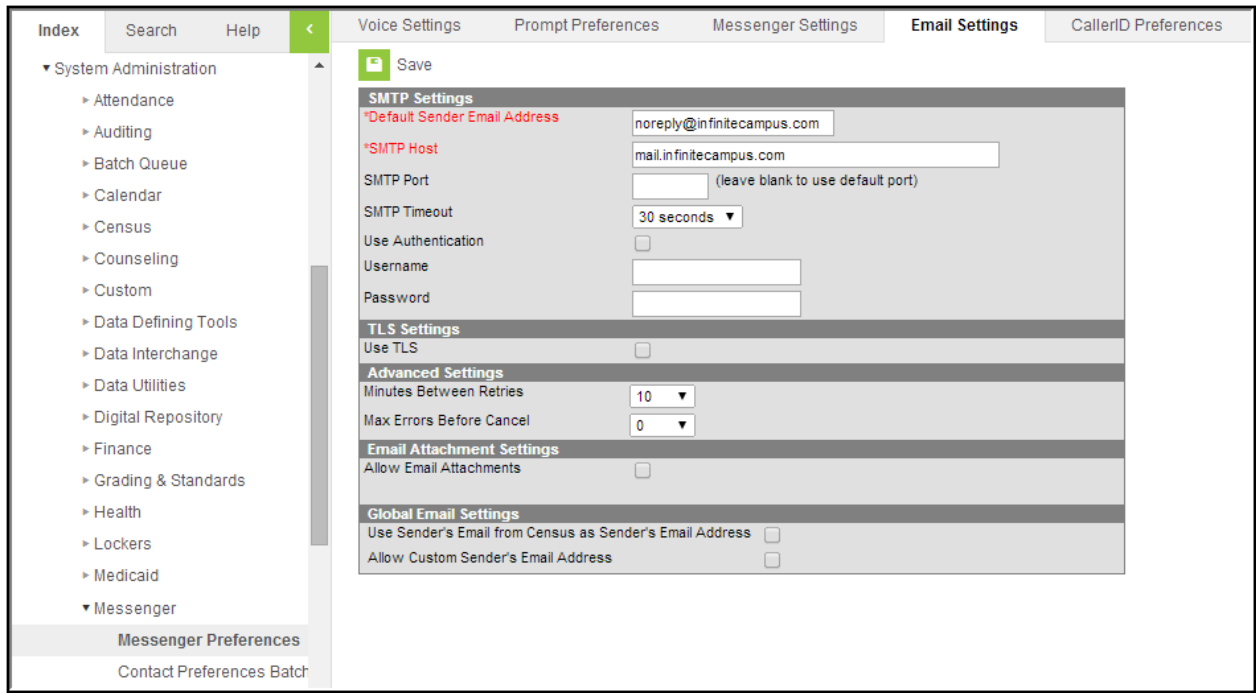
Assign Data Integrity Tool Rights

PATH: *System Administration > User Security > Users > Tool Rights*

For district users to properly view and certify events, they must be given tool rights to the appropriate Data Integrity Tools.
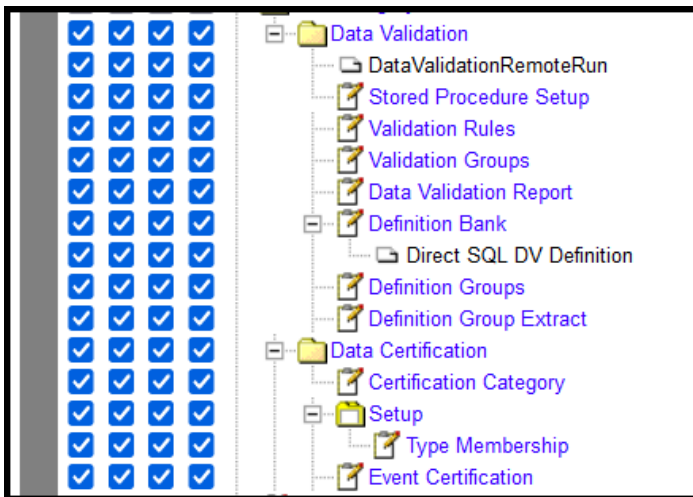
Assign Filter Designer Tool Rights

PATH: *System Administration > User Security > Users > Tool Rights*
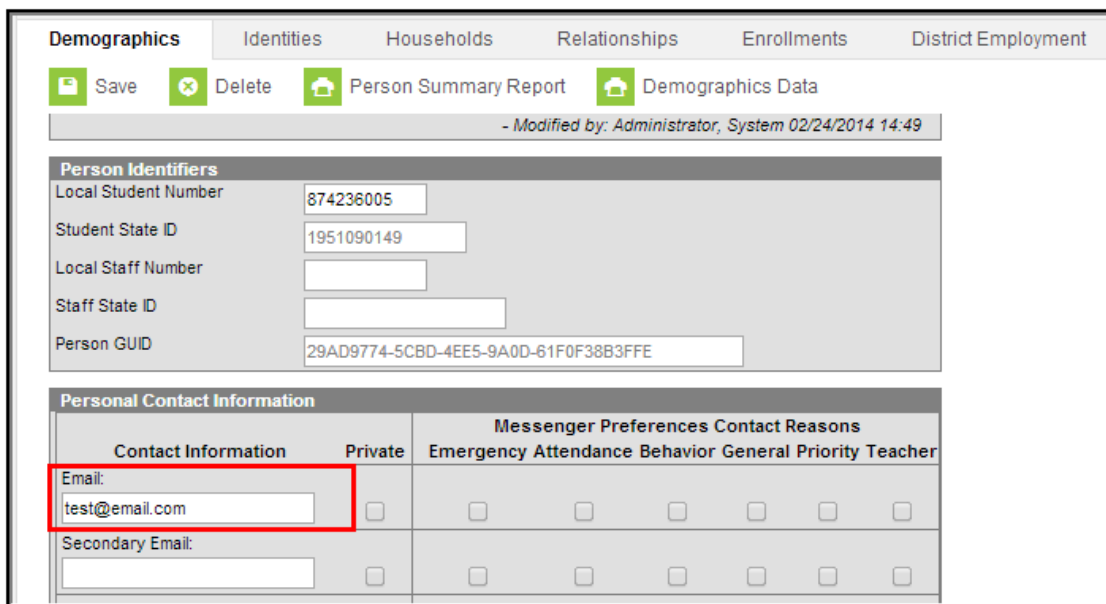
For users to view data certification event data sent by the state in Ad hoc filter form, users must have tool rights to the Filter Designer and State Owned Filters sub-right.
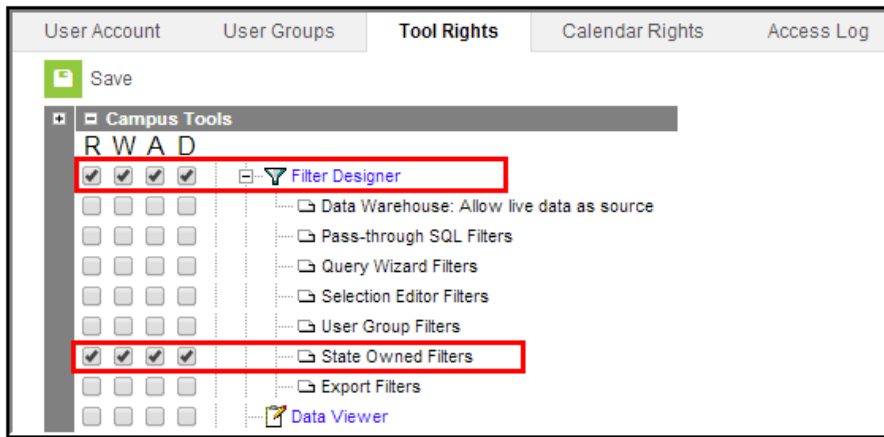
Ensure Users Have a Valid Email Address

For users to receive email notification about data certification event activity, they must have a valid email address entered on the Demographics tab.

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 only use State-defined, pre-populated definitions, please start with Step 4.

Step 1 - Establish Data Validation Definitions

PATH: *Data Integrity Tools > Data Validation > Definition Bank*

In order for district users to validate data, data validation definitions must be established. Data validation definitions 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.

Step 2 - Create Data Validation Groups

PATH: *Data Integrity Tools > Data Validation > Data Validation Groups*

Once data validation definitions are created and tested, data validation groups must be established. 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 from 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.

Step 3 - Export Data Validation Definition and Group Data

PATH: *Data Integrity Tools > Data Validation > Definition Group Extract*

Once data validation groups have been reviewed, users should locally export the results of data

validation groups or definitions via the Definition Group Extract tool.
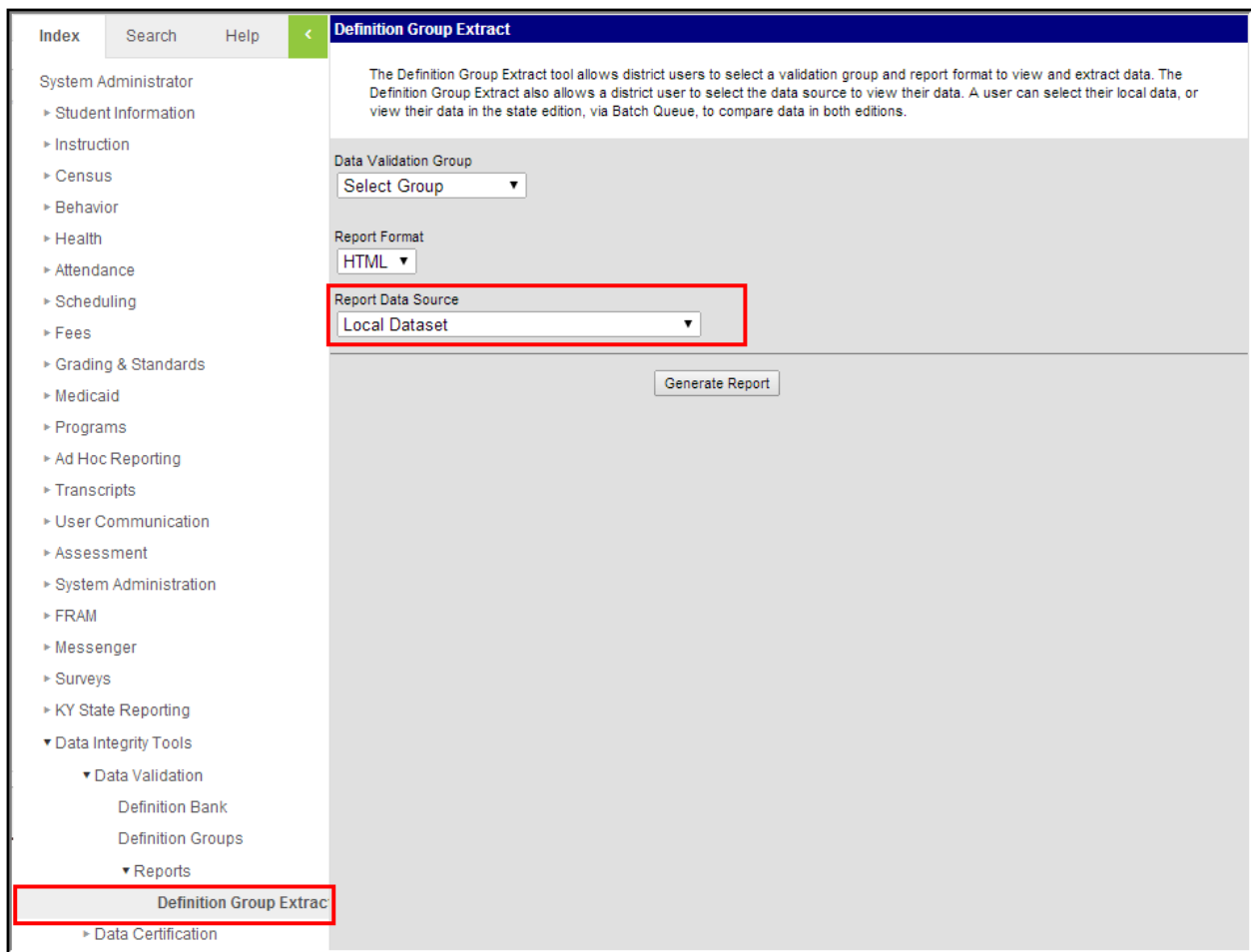
Step 4 - Run Data Validations at the State

PATH: *Data Integrity Tools > Data Validation > Reports > Definition Group Extract*

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

Data Certification Setup Workflow

The following steps define the basic workflow for setting up Data Certification tools so that users can begin to create and approve 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

PATH: *Data Integrity Tools > Data Certification > Certification Category*

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

Step 2 - Certify and Submit Data Certification Events

PATH: *Data Integrity Tools > Data Certification > 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 as well as 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

PATH: *Process Inbox; Data Integrity Tools > Data Certification > Event Certification*

Once an event has been certified by a district, 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 event is certified by the district.

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.