Data Certification Event Workflow (State Edition)

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This article will walk you through the process of setting up, publishing, and certifying a new data certification event.

> **Data Certification tools are only available in State Editions of Campus that have purchased the [Campus Data Suite](#).**

Tool Rights

Before creating a new Data Certification Event, it's important to properly assign tool rights to staff members who will be creating certification categories, creating certification events, reviewing events, and approving events.

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Event Management

- **Read** - Provides access to the tool, but you cannot interact with it.
- **Write** - Provides access to edit events (but you cannot view or publish the event).
- **Add** - Provides access to create new events, publish events, and copy events.
- **Delete** - Provides access to delete unpublished events or close published events.

> Event certifiers must have full tool rights.
>
> Event reviewers must have at least Read and Write rights.

Certification Category

- Users creating data certification categories should have full tool rights to this tool.
- Staff members assigned as Certifiers MUST have full tool rights to the Event Management and Event Report tools.
- Staff members assigned as Reviewers MUST have at least Read and Write rights to the Event Management and Event Report tools.

Step 1. Create Data Certification Categories and Validation Groups

The first step in the event certification process is to create data certification categories and validation groups.

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1. Create Data Certification Categories
   a. For each category, determine if it should be for the district or school level.
      ▪ This must match the Category Level set for the event.
   b. Ensure approvers and reviewers are added to the category.
      ▪ Approvers are those state-level staff members who are allowed to approve a district's event certification data.
         ▪ Approvers MUST have full tool rights to the Event Management and Event Report tools.
      ▪ Reviewers are staff members who are allowed to review a district's event data for accuracy but cannot approve it.
         ▪ Reviewers MUST have at least Read and Write rights to the Event Management and Event Report tools.

2. Create Data Validation Groups
   a. Data Validation Groups must NOT utilize Rules containing Ad hoc filters.
   b. They must be scoped to the same level as the Certification Category and Data Certification Event (i.e., the same school or district)
   c. They must NOT utilize Rules containing calendar parameters.

Step 2. Create a Data Certification Event

Once the Data Certification Categories and Validation Groups have been created, you need to create the data certification event.

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1. Navigate to the Event Management tool (Reporting > Data Certification > Event Management) and click the **New** icon.

2. Enter the Event Details.
   ○ This is where you define the event name, reporting year, start date, end date, active status, and description.

3. Enter Data Details.
   ○ This is where you define the Certification Category and link previously created Data Validations Groups for reporting, or you add external URLs to outside data sources.

4. Enter Participant Details
   ○ This is where you will define the level of certification (school or district) and which schools/districts will participate in this event.
      ▪ You must assign at least one participant in order to continue.
      ▪ Only selected participants will have this event available to them upon state publication.

5. Define if the event requires a snapshot, and if so, how/when you want the snapshot to be collected.

6. Click **Save** if you want to save but are not ready to publish the event to the districts/schools selected, or if you are ready, click **Save & Publish**.
   - Participating schools/districts will be notified of publication and, depending on the Event Start Date, can begin certifying their data.

Step 3. Review In-Progress Events

Once a data certification event(s) has been published to districts/schools and the event window has been opened, you should monitor district/school progress.

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Data certification event status can be reviewed via the Event Report or the Event Viewer within the Event Management tool.

1. To generate a report about a district's status for a specific event, navigate to the Event Report (Reporting > Data Certification > Event Report)

2. For a more in-depth look at the status of each school/district for an event, navigate to the Event Management tool (Reporting > Data Certification > Event Management).

3. Click the **View** button in the Action column for the event you wish to review. Once selected, you will be taken to the **Event Viewer**. This editor allows you to review the following:

Section	Description
Event Details	This section displays the event name, start and end date, certification level, description, reporting year, category, and status. Districts/schools can only certify the event between the Certification Opens and the Event End Date window.
Datamart View Information	This section displays the view table information after a snapshot has been taken at either the state or district/school level
Data Link Details	This section displays any external links (such as a URL to an outside of Campus dataset), and a report of the Data Validation Group associated with the event.
Event Admin Details	This section displays all state-level staff members tied to the event via the Certification Category and details their role, status, and State Staff ID.
State Snapshot Information	This section allows you to run Data Validation Rules against any data that is currently in the snapshot datamart.
Scheduled Snapshot History	This section will show any completed or scheduled data snapshot (including scheduled cleanup snapshots). You can also view which districts were included in previously run snapshots.

Section	Description
Certification Status	This section details the progress of all participants in the event, including their district/school name, number, progress, status, snapshot date, and, within a specific school or district, the certification status per user, snapshots run, and the ability to override the certification due date for a specific user.

4. You can also send a message to specific district/school certifiers to remind them to finish certifying the event.

Step 4. Approve District/School Certifications

Now that Data Certification Events have been published and their certification date windows are open, districts/schools will begin to review and certify their data. Once a district/school has certified its data for an event, State-level approvers and reviewers must review their submitted data and either approve their certification or request that they recertify the data if they disagree with the quality and/or accuracy of the information provided.

▶ Click here to expand...

1. Navigate to the Event Management tool (Reporting > Data Certification > Event Management).

2. Select **View** in the Action column of the event.

3. Scroll down to the **Certification Status** section.
4. Review the data of each school/district with a **Status** of 'Certified'. If you approve of their data, mark the checkbox next to the name and click **Approve Certification**.

   ○ State users can approve district/school certifications that are not in a 'Certified" status. This means they can approve a certification even if the school/district has not submitted all of its certifications.

If you do not approve of a school/district's data, mark the checkbox next to the name and click **Request Recertification**. This school/district will need to clean up and resolve issues with its data before resubmitting it for certification.

Step 5. Finalize the Data Certification Event

Once a data certification event's due date has passed, the state should finalize and close the event.

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1. Navigate to the Event Management tool (Reporting > Data Certification > Event

Management).

2. Select **View** in the Action column of the event.

3. Click the **Close Event** button.

4. Enter a comment and click **Close Event**.

> **NOTE:**
>
> - Closed events are hidden from schools and districts.
> - Closed events cannot be reopened. If you need to certify this data again, you need to create a new data certification event.
> - Snapshot data tied to a data certification event remains in the datamart, even after the event has been closed.
> - Unpublished events cannot be closed but can be deleted. They are not visible to districts or schools.