#### <u>AIM User Guide:</u> Data Validation and Certification Guide

# Data Validation and Certification

#### AIM User Guide

Purpose of this guide:

- Configure Data Validation to allow districts to run state configured Validation Reports.
- Configure Data Certification to allow districts to submit required reports.

The OPI is transitioning to Data Integrity Tools in Infinite Campus for districts to validate and certify their Infinite Campus data.

This guide describes

1) How to set up Data Integrity Tools (Data Validation & Data Certification) in Infinite Campus.

- 2) How to run Data Validation Reports.
- 3) How to prepare for Date Certification Events.
- 4) How to certify and submit Events to the state.

**Note:** Districts may use Data Validation tools at any time. Certification Events are only active for a selected time period.

#### **Order of Operations:**

1. Assign User Groups (e.g., Data Validation) to the Data Validation Groups;

2. Assign roles to certifiers and reviewers under Data

Certification>Setup>Type Membership

- 3. Run Validation Reports to verify data
- 4. Go to the Event Dashboard and certify Events

#### **DATA VALIDATION SETUP**

The state has created Validation Groups for the district to use for data verification. Validation Groups are set up by collection and published to districts. These Validation Groups are collections of Ad Hoc or SQL reports that can be run simultaneously. Some of these Validation Groups are precursors to Data Certification (such as Behavior and Graduate, Dropout, Cohort) and some are set up to prepare you for certification in other systems (such as the MAEFAIRS ANB Count).

- 1. Users who are responsible for Data Validation must be assigned to the Data Validation Group.
  - a. Navigate to the Search tab.
  - b. Select User and enter the individual's last name.
  - c. Click the username that appears under the user's name.
  - d. In the workspace select the User Groups tab.
  - e. Add the Data Validation group (click to add to the User Account).

	f. Click Save.	
Index Searcha	User: OPIDistrictLogin Person: Bostrom, Karrie	
User 🗸	User Account User Group Tool Rights Calendar Rights Access Log	
OPI b Go Advanced Search	User Group Membership	
Search Results: 2 users	Search and Add User Groups † Current Group Membership †	
Bostrom, Karrie		T
OPISpedMonitor	Data Validation e Ad-Hoo Share	ghts
	Dialer District Admin Data Health Check	
	District Counselors OPI District Support	
	District Librarians	
	District Staff	
	User Rights Summary	

- 2. Assign a User Group to the Validation Groups
  - a. Under Data Integrity>Data Validation select Validation Groups.
  - b. Selection a Data Validation Group.
  - c. From the User Group Dropdown select Data Validation.
  - d. Click Save & Stay.

Index Search <	Valio	dation Groups											
Batch Queue													
> User Communication	,	iame †	User Groups	Published	Own	ner	Status						
► Assessment						2							Students that have an unlocked IEP for the selected school year.
System Administration     FRAM		Spring ANB Certification	Data Certification	PUBLISHED	Stat	te	13	٠		ALL Unlock	ked IEP		IEPs that have been finalized should be locked so the ER data is transmitted to the state. ERs that are still in progress do not need
MT State Reporting	5	SPRING ANB Counts to Verify		PUBLISHED	Stat	ite							be locked.
* Data Integrity Tools	5	SPRING ANB Data Checks	Data Validation Reports and Extract	PUBLISHED	Stat	te				ALL Unlock	ed Evaluatio	n	Students that have an unlocked Evaluation Report (ER) that is act in the selected school year. Any ERs that have been finalized shou
Data Validation     Stored Procedure Setup	5	SPRING ANB Lists & Counts to Certify	Data Certification, Data Validation Reports and Extract	UNPUBLISHED CHANGES	Stat	te	55 14			Report (ER	1		be locked so the ER data is transmitted to the state. ERs that are in progress do not need to be locked.
Validation Rules	ŝ	Students with missing information		PUBLISHED	Sys	sterr							
Validation Group.	1	Test Validations	Data Validation Reports and Extract	NOT PUBLISHED	Stat	te	Add	Rem	ove				
Data Validation Report	1	Test Window Mode of Instruction Data											
Definition Bank		4 4 1 2 ▶ H						C					
Definition Groups							User Groups 🕚						
							Data Validat	tion R	eports	and Extract	×		
							d						
							Save & Stay	Car	ncel	Delete	Preview	Publish	

## VALIDATING DATA

Use Data Validation Reports to verify the accuracy of data *prior to* Certification:

- a. Select a Data Validation Group
- b. Select State Dataset (so it runs based on what is reported to the state will identify potential sync issues).
- c. Submit to Batch will automatically select (the only option for State Datasets).
- d. Choose a format (HTML or CSV).
- e. Click Generate.
- f. Check the Process Inbox for notification of completion.

\*Repeat these steps selecting Local Dataset to ensure that the data at the state and district are in sync. If there are differences, complete a resync of enrollment data (System Administration>Data Utilities>Resync State Data>Enrollment) and repeat these steps.

Index	Search	<	Data Validation Report	
Search Campus Te	ools			
► Attendance		^	Instructions	
▹ Scheduling				
Fees			The Data Validation Report returns results from the Data Validation	on Group selected. The Summary section includes the number of occurre
▶ Grading & St	andards		run against the State Dataset via DIS.	nur the Rate of the primary Rule compared against the baseline Rule. Sta
▶ Program Adr.	nin			
▶ Ad Hoc Repo	rting		Report Options	
▶ User Commu	nication		Data Validation Group *	
▹ Assessment				
▹ System Admi	nistration		. In	
► FRAM			Report Data Source	
▶ MT State Rep	porting		O Local Dataset	
<ul> <li>Data Integrity</li> </ul>	Tools		State Dataset	
▼ Data Vi	alidation			
Stor	ed Procedure Setu	p		
Vali	dation Rules		Output Options	
Vali	dation Groups		Report Processing	Format Type
Dat	a Validation Repor	t	Generata Now C	
Def	nition Bank		Submit to Batch Queue	CSV
Def	nition Groups			
Def	nition Group Extrac	1	Batch Queue List	
► Data C	ertification			
Account Setting	IS	е	Denut Dent	
Access Log		÷	Generate	

## **DATA CERTIFICATION SETUP**

Before a district can certify an event, the following steps must be completed to prepare for certification:

- 1. Configure Email Messenger this step allows districts to receive notifications when an event is published and/or updated by the state.
  - a. System Administration>Messenger>Messenger Preferences.
  - b. Enter the Default Sender Email Address (appears as "sent from" on the email message).
  - c. Click Save.

Note: To receive email messages a user must have an email entered under Census>People>Demographics

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	Index	Search <	Email Settings	Messenger Settin	gs		
			Save				
Sear	rch Campus To	pols	ouve				
	Gra	ding Comments	Basic Settings *Default Sender Emai	Addre a			]
	▼ Health		SMTP Port		(leave blank t	o use default nort)	
	Con	idition List	SMTP Timeout	30	seconds 🗸	o use delada porty	
	<ul> <li>Medical</li> </ul>	id	Use Authentication Username			-	
	Insu	Irance	Password	_		-	
	▼ Messer	nger	Verify Password				
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	COIL	Itact Preferences Batti	Max Errors Before Ca	ncel 0	~		
	Sen	t Message Log	Throttle Email Messag	les	emails per secon	nd (leave blank to not throttle)	
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	▶ Portal			0			
	▶ Prefere	nces	Global Email Setting Use Sender's Email f	s rom Census as Reply 1	o Email Address		
	▶ Resour	ces	Allow Custom Reply	To Email Address			
	Search Fr	ramework Status	Allow Custom Sender	Display Name			
	▹ Special	Ed	Send Test Email	contiguration	t@example.com		
	▶ Student	t	Condition	100	agona nprototili		

- 2. Users who are responsible for Data Certification must be assigned to the Data Certification Group.
  - a. Navigate to the Search tab.
  - b. Select User and enter the individual's last name.
  - c. Click the username that appears under the user's name.
  - d. In the workspace select the User Groups tab.
  - e. Add the Data Certification group (click to add to the User Account).
  - f. Click Save.

Index Search a	User: OPIDistrictLogin Person: Administrator, System			
User b 🗸	User Account User Groups	ool Rights Calendar Rig	hts	Access Log
OPI Go				
Advanced Search	User Group Membershi	р		
Search Results: 2 users				
	Search and Add User Groups	t		Current Group Membership 1
Administrator, System		T		
OPISpedMonitor	Attendance Clerks	·	•	Ad Hoc Reporting
	Counselors			CampusAllCalsModifyRights
	Data Certification			Data Validation
	Disciplinary Staff			MTE_all_tools
	Elrod Sch			
	Health Staff			
	Master Schedulers			
	Principals			
	Read Only			
	Records Transfer			
	Registrars (Census)			
•	Save User Rights Summary			

- Assign Data Certification roles to district staff Data Integrity Tools>Data Certification>Setup>Type Membership
  - a. Click New.
  - b. Enter search criteria in the name field and select certifier (to be included in search results an individual must have an active employment record in the district and be assigned rights to Data Certification).
  - c. Select Primary or Secondary (Primary = can certify, Secondary = can review, not certify).
  - d. Click Save.

**Note:** To remove a user select the person's name and uncheck "Active". Once a record is saved it cannot be deleted.

Year 22-23 V School	Edgerton School	~			
Index Search	< Type Membership	d			
Search Campus Tools	New Member  Data Certify tion M	Save Type: COHORT to	Certify 🗸	Data Certification Membership Detail	
► Scheduling	Name     Doe, Jan     Ocker Kin	Sta Acti	tus Type ve Primary	Staff Search	
<ul> <li>Fees</li> <li>Grading &amp; Standards</li> </ul>	UCKNI, HUTA		Lave Thinkiy	Staff State ID Name	<b>B</b> ,
► Program Admin					
Ad Hoc Reporting				Staff State ID Name	
User Communication				Doe, John	
▶ Assessment	1			"Type	Active
System Administration				Secondary	
▶ FRAM					
MT State Reporting	/				
<ul> <li>Data Integrity Tools</li> </ul>					
▶ Data Validation					
Data Certification					
Certification Category					
Setup a					
Event Certification					
Assessment Collings					

## **CERTIFYING DATA**

Data may only be certified during a window established by the state. Secondary users should use the Data Validation tools to review data in preparation for certification. When reviewing data it is important to pay attention to the year and school selected. If you are reviewing prior year data (e.g., graduate, dropout and cohort information) select the prior year and a middle or high school (districts without an approved 7-8 program will select their elementary school only).



- 1. Once a certification window opens the district will be able to view the Event on the Event Certification Dashboard: Data Integrity Tools>Data Certification>Event Dashboard.
  - a. Click Certify and Submit

**Note:** Read the instructions on the Event Detail carefully. Some validation reports may be run under Data Certification, while others may have to be run from Data Validation Reports. Data should be verified at the state and local level prior to certification. The Run at State option shows what is in the State Edition of Infinite Campus and only submits to batch.

Event Certification						
7-8 DROPOUT List and 9-12 DROPOUT Data C	Counts - To Certify 2017-18 hecks 2017-18	11/15/2018 10/13/2018	Certified on 10/04/	2018		
Event Detail Event Name:	7-8 DROPOUT List and Counts - To	o Certify 2017-18	_	1		
Reporting Year:	2018					
Event Start:	09/04/2018					
Snapshot Available:	10/02/2018 12:00 AM					
Certification Opens:	10/02/2018 12:00 AM					
Event End:	11/15/2018					
Data Certification Types:	7-8 DROPOUT to Certify		L;	~		
Event Description:	This provides a list of students and in 2017-18. This list and counts should be certi	a count by school of t fied for the OPI.	the dropout students			
External Data Links:						
Ad Hoc Data Links:						
Data Validation Group	s: 7-8 DROPOUT List and Counts - To	o Certify   Run At Sta	ite			
Review Snapshot Snapshot has been capl	tured. Click below to review the data.	_	_		_	
Review Snapshot						
Status Please review all data fo	or this event before clicking the Certify	& Submit button.				
Certify & Submit					- Certified on 10/04/2018	11:55
View District Certification	n Status		_			

FOR MORE INFORMATION,

CONTACT THE AIM HELP DESK AT 1-877-424-6681 OR Submit an AIM Help Desk Ticket