

Version 1.2 – 3 October 2014

This quick guide is intended to provide brief instruction in how state, district and school assessment Coordinators can use the Open Source Administration and Registration Tools (ART) system to create institutions and assign users to the correct institutions. Please note that the user interface of this instance of ART shows all possible ART tasks. For the purposes of doing user creation and institution creation we will be using Upload Institutions, User and Students or Create/Modify Institutions or Users. All other tasks will appear on the homepage, but users will not be able to save any data in those tasks and make any changes except to user accounts or institutions.

Logging on to ART

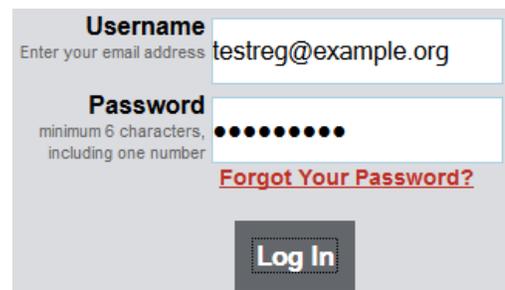
The Smarter Balanced instance of ART is at <http://art.smarterbalanced.org>.

To access ART, you must have an authorized username and password. If you do not, please contact your system administrator or coordinator.

To log in to the Administration and Registration Tools System:

1. Open your web browser and navigate to the Administration and Registration Tools System at <http://art.smarterbalanced.org>. You will be directed to the Single Sign On Login screen.
2. In the *Username* field, enter your username.
3. In the *Password* field, enter your password.
4. Click [**Log In**]. You will be directed to the Administration and Registration Tools System home screen, provided your login is authenticated.

Figure 1. Login Screen



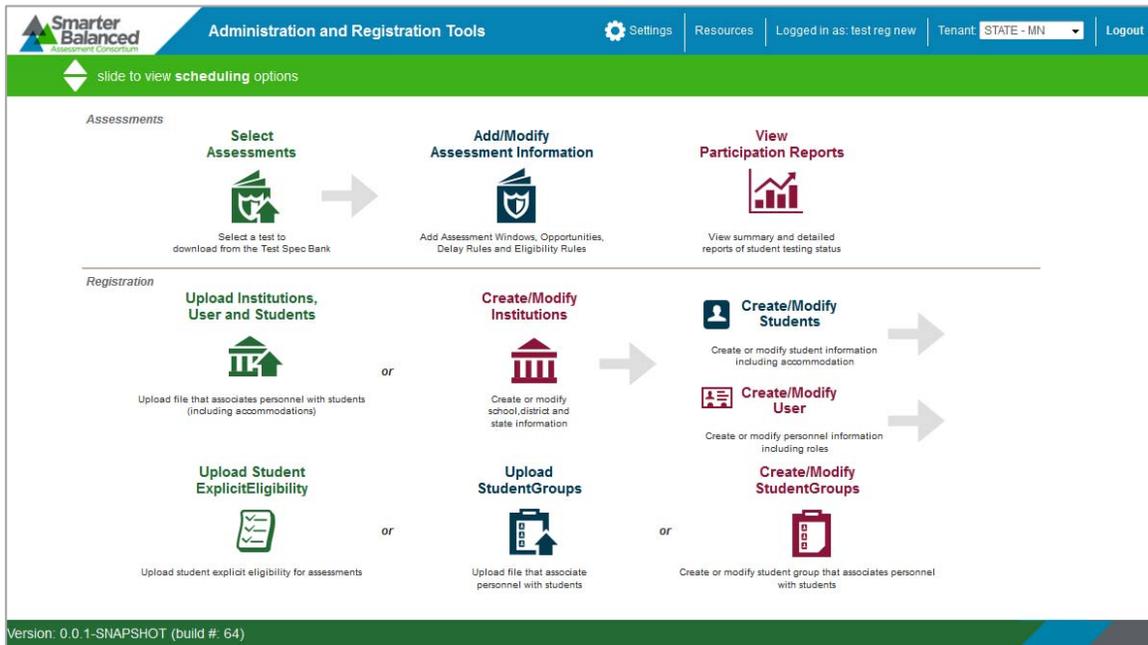
The screenshot shows a login form with two input fields. The first field is labeled 'Username' and has a placeholder 'Enter your email address' and the text 'testreg@example.org'. The second field is labeled 'Password' and has a placeholder 'minimum 6 characters, including one number' and a series of dots. Below the password field is a link that says 'Forgot Your Password?'. At the bottom of the form is a button labeled 'Log In'.

UNDERSTANDING THE ART INTERFACE

ART Home Screen

The first screen you see after logging in to ART is the ART home screen. The only tasks you will need are those on the second line, Upload Institutions, User and Students or Create/Modify Institutions. Additionally you will need to use the Resources dropdown in the header bar to access the user template.

Figure 2. ART Home Screen



Do not have more than one ART browser tab or window open simultaneously. Changes made in one tab or window may overwrite changes made in another, resulting in loss of data.

DISTRICTS AND INSTITUTIONS

In order to associate users with the correct schools and districts, those institutions must first be created in ART. ART is a hierarchical system. State Coordinators, created by the Smarter Balanced Consortium can create any user below their level, and any institution in the state. State Coordinators can thus create either other State Coordinators to assist them, or they can create lower-level institutions and users. If a State User creates a district in ART, then creates coordinators for that district, those district coordinators can create schools and school coordinators. School coordinators may create users in their school.

Creating and Modifying Institutions in ART

You can create or modify institutional accounts using the following methods:

- **File Uploads:** This feature allows you to upload many institutions at once by using the predefined file template, which can be constructed in Excel. In most cases, you can use file uploads to modify or delete existing user accounts.
- **Create/Modify Institutions:** This feature allows you to create institutions using the forms provided on the ART user interface. You can also use the **Create/Modify** features to modify or delete existing institutions in ART.

Managing Records

The following sections provide instructions for creating or modifying the various record types, and also provide detailed information about creating, modifying, or deleting records through file uploads.

Managing Districts.

State users may create district records. Districts must belong to a state.

Create or modify a district.

Figure 3. District Search Screen

Type Of Institution to create or modify: [State](#) | [GroupOfStates](#) | [District](#) | [GroupOfDistricts](#) | [Institution](#) | [GroupOfInstitutions](#)

 **District Search**

Search Filters

Local Education Agency Idel Organization Name:

State Abbreviation:

 Search  New

 Export All to Excel  Export All to CSV  Export Search Results to Excel  Export Search Results to CSV

District ID ↓	District Name	NCESLEAID	Parent Entity Type	Parent Entity Name	State Abbreviation	
00000000001894	BAKER SD 5J	4101710	State	OREGON	OR	 
00000000001895	HUNTINGTON SD 16J	4106600	State	OREGON	OR	 

To create a district:

1. On the ART home screen, click **[Create/Modify Institutions]**.
2. On the **Create/Modify Institutions** screen, click the **[District]** link.
3. On the **District Search** screen, click **[New]**.
4. On the **Add District Information** screen, enter the information for the district in the provided fields. For an explanation of these fields, see [Table 1](#).
5. Click **[Save]**.

To modify a district:

6. On the **District Search** screen, search for a district record.
7. In the search results table, click [] for a district record.
8. On the **Edit District Information** screen, modify the information for the district in the provided fields. For an explanation of these fields, see [Table 1](#).
9. Click [**Save**].

To delete a district:

10. On the **District Search** screen, search for a district record.
 11. In the search results table, click [] for a district record.
 12. In the warning box that pops up, click [**OK**].
- Caution: If you delete a district, all of the child entities within that district will also be deleted.**

Upload districts.

You can add, modify, or delete districts by uploading a file to ART.

To upload a district file:

13. Download the District template from the Resources section.
14. Using [Table 1](#) as a reference, enter a row of information for each district you want to add, modify, or delete.
 - a. To modify an existing district record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
 - b. To delete an existing district record, enter "DELETE" in the Delete column.
15. On the ART home screen, click [**Upload Institutions, Users and Students**].
16. Upload the district file.

[Table 1](#) describes the columns in the district file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add District Information** screen. Columns marked with an asterisk (*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions. *Note: Some of the labels on the district template differ from those on the **Add District Information** screen. The unique labels from the **Add District Information** screen are provided in parentheses under the labels in the template.*

Table 1. Upload District File Requirements

Column	Description
LocalEducationAgencyIdentifier** (District ID)	A unique number or alphanumeric code assigned to a local education agency by a school system, a state, or other agency or entity. Up to 20 alphanumeric characters.
OrganizationName* (District Name)	District Name. Up to 60 characters.
NCESLEAID	Unique nationwide district identifier. You can find this by using http://nces.ed.gov/ccd/districtsearch/ . Up to 20 numbers.
ParentEntityType*	District's parent in the Consortium's hierarchy. Must be: <ul style="list-style-type: none"> • STATE—Indicates the district is a member of a state.
ParentExternalId*	For districts belonging directly to a state, this is the two-character state postal code abbreviation.
StateAbbreviation**	State in which the district is located. (Usually the same as ParentExternalId)
Delete+	Flag for deleting the district. <ul style="list-style-type: none"> • DELETE—Delete the district associated with the combination of LocalEducationAgencyIdentifier and StateAbbreviation. • <blank>—Add the new district, or modify the existing district.

Managing Institutions.

State or District Coordinators can create institution (school) records.

Create or modify an institution.

Figure 4. Institution Search Screen

Type Of Institution to create or modify: [State](#) | [GroupOfStates](#) | [District](#) | [GroupOfDistricts](#) | [Institution](#) | [GroupOfInstitutions](#)

 **Institution Search**

Search Filters

Institution Identifier: Name of Institution:

State Abbreviation:

 Search  New

 Export All to Excel  Export All to CSV  Export Search Results to Excel  Export Search Results to CSV

Institution Identifier	Name of Institution	Parent Entity Type	NCES Institution Id	Parent Entity Name	State Abbreviation	
00001	A.A. RATHER SCHOOL	District	6887	IONIA PUBLIC SCHOOLS	MI	 

To create an institution:

17. On the ART home screen, click **[Create/Modify Institutions]**.
18. On the **Create/Modify Institutions** screen, click the **[Institution]** link.
19. On the **Institution Search** screen, click **[New]**.
20. On the **Add Institution Information** screen, enter the information for the institution in the provided fields. For an explanation of these fields, see [Table 2](#).
21. Click **[Save]**.

To modify an institution:

1. On the **Institution Search** screen, search for an institution record.
2. In the search results table, click  for an institution record.
3. On the **Edit Institution Information** screen, modify the information for the institution in the provided fields. For an explanation of these fields, see [Table 2](#).
4. Click **[Save]**.

To delete an institution:

1. On the **Institution Search** screen, search for an institution record.
2. In the search results table, click [] for an institution record.
3. In the warning box that pops up, click [OK].

Caution: If you delete an institution, all of the child entities within that institution will also be deleted.

Upload Institutions.

You can add, modify, or delete institutions by uploading a file to ART.

To upload an institution file:

22. Download the Institution template from the Resource section.
23. Using [Table 2](#) as a reference, enter a row of information for each institution you want to add, modify, or delete.
 - a. To modify an existing institution record, enter the information for the new record in its own row. The old record will be replaced upon uploading the file.
 - b. To delete an existing institution record, enter “DELETE” in the Delete column.
24. On the ART home screen, click [**Upload Institutions, Users and Students**].
25. Upload the institution file.

[Table 2](#) describes the columns in the institution file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add Institution Information** screen. Columns marked with an asterisk (*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions.

Table 2. Upload Institution File Requirements

Column	Description
InstitutionIdentifier**	Unique identifier for the institution. Up to 20 alphanumeric characters.
NameOfInstitution*	Institution name. Up to 60 alphanumeric characters.
ParentEntityType*	Institution’s parent in the Consortium’s hierarchy. Must be: <ul style="list-style-type: none"> • DISTRICT—Indicates the institution is a member of a district.
NCESInstitutionId*	Institution’s unique nationwide identifier. You can look up an NCES identifier at http://nces.ed.gov/ccd/schoolsearch/ .
ParentExternalId*	Up to 20 characters of an existing client’s district ID which is the parent of this school.

Column	Description
StateAbbreviation**	<ul style="list-style-type: none"> State in which the institution is located.
Delete+	Flag for deleting the institution. <ul style="list-style-type: none"> DELETE—Delete the institution associated with InstitutionIdentifier. <blank>—Add the new institution or modify an existing one.

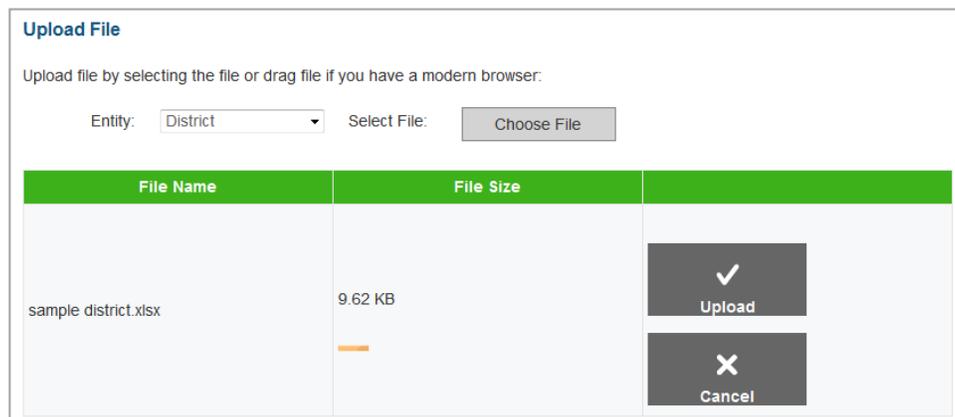
Uploading Files.

First select the correct file template from the Resource section at the top of the page.

The file upload process has four main steps: (1) Choose File, (2) Preview File, (3) Validate File, and (4) Confirmation. This process allows you to confirm that the correct file was uploaded and that it contains no errors. When uploading a file, you must use the correct upload screen for that record type.

Step 1: Upload File

Figure 5. Upload File, Step 1: Choose the File



Upload File

Upload file by selecting the file or drag file if you have a modern browser:

Entity: Select File:

File Name	File Size
sample district.xlsx	9.62 KB

26. On the home screen, navigate to the appropriate file upload screen for the record type.
27. Select the record upload type from the *Entity* drop-down list on the **Upload File** screen.
28. Click [**Choose File**] and select the saved file on your computer. The file name and file size appears in the table on the screen. *Note: If you are using a modern browser, you may also click and drag the file directly into the table provided on the upload screen.*
29. Verify that the name of the file is correct, and then click [**Upload**].

Step 2: Preview File

Figure 6. Upload File, Step 2: Preview Records

 **Preview File**

This page allows you to preview the first few records in the file to ensure that you uploaded the correct file and the data are in the correct fields.

DISTRICT

LocalEducationAgencyIdentifier	OrganizationName	NCESLEAID	ParentEntityType	ParentExternalId	StateAbbre
88888	test	999	STATE	HI	HI

Validate
 Cancel

30. To ensure that you uploaded the correct file, you can preview the file you selected in the table on this screen. *Note: Only the first few records in the file are visible on this preview screen.*
31. To begin the file validation process, click **[Validate]**.



Caution: If your file is large, uploading it may take a long time. DO NOT cancel the upload and try again, because ART may have already begun processing some of the records. If your file is too large to upload while you are online, you will be asked to provide an email address. When the file is processed, you will receive an email.

Step 3: Validate File

If the file passes validation, a message appears, indicating that no validation errors were found (see [Figure 7](#)). You can click [Save] to proceed to the final step.

If the file contains records with errors, an error message appears (see [Figure 8](#)). Depending on the severity of the error, either the entire file will fail or just the records with errors will fail.

Files with data that are not in the correct format as shown in the template will generate error messages by row, identifying the errors in the file.

The “Understanding Error Types” section in the column to the right provides a brief explanation of the three possible error types: fatal errors, record errors, and record warnings.

Figure 7. Step 3: Successful Validation



Understanding Error Types

-  **If the entire file fails**, note the errors and the corresponding record numbers. Click [Cancel], update your file, and then restart the upload process from Step 1: Choose File.
-  **If the file contains record errors**, these records *will not be committed* to ART. The records that passed validation can be committed. You may elect to fix the errors in your file and re-upload it, or to add these records individually on the appropriate **Create/Modify [Record]** screen.
-  **If the file contains record warnings**, these records will be saved to ART. However, you are strongly encouraged to review the associated records. You may edit these records using the appropriate **Create/Modify [Record]** screen.

Figure 8. Failed Validation

Error(s) of this type will cause the entire file upload to fail. Click Cancel, update your file and restart the upload process.

 File can be saved but records with this type of error will not be included. You may elect to fix the errors and re upload the file or add these records later using the administration option to manage this type of file records.

 These are warnings. File can be saved. However, you are strongly encouraged to review the associated records. You may edit these records using the administration option to manage this type of file records.

DISTRICT

	Record Number	Field Name	Field Value	Validation Message
	3	NCESLEAID	999	NCESLEAID already exists in DB and cannot be added

Step 4: Confirmation

After you click [**Save**], the accepted records will be uploaded to ART. A table appears, confirming the type of records uploaded, the number of records deleted, and the number of records inserted.

Figure 9. Upload File, Step 4: Confirmation



About Data Columns and Edit Fields.

For a given record type, the fields displayed on the **Add [Record] Information** and **Edit [Record] Information** screens correspond with the data columns included in the template used to upload that same record type. Column labels on the template use CamelCase, while fields on the **Add [Record Type] Information** and **Edit [Record] Information** screens use Title Case. Otherwise, these labels are usually identical.

For example, the **Add District Information** screen includes the *Organization Name* field. The corresponding column on the District template is “OrganizationName.”



The “Delete” column in upload templates does not have a corresponding field on the **Add [Record] Information** and **Edit [Record] Information** screens, because individual records are deleted directly from the search results table on their **Create/Modify** screen.

USER ACCOUNT TASKS

Creating and Modifying User Accounts in ART

You can create or modify user accounts using the following methods:

- **File Uploads:** This feature allows you to upload many Digital Library users at once by using the predefined User upload file template, which can be constructed in Excel. In most cases, you can use file uploads to modify or delete existing user accounts.
- **Create/Modify User accounts:** This feature allows you to create individual user accounts using the forms provided on the ART user interface. You can also use the **Create/Modify** features to modify or delete existing user accounts in ART.

Creating an Upload File.

Each template consists of columns appropriate for the type of upload file you selected. The top row in the template contains the data columns for which you enter the appropriate information. You enter the information for each user role in the subsequent rows.

Figure 10. Sample Template for District User accounts

	A	B	C	D	E	F	G	H		
1	StateAbbreviation	StateName	ParentEntityType	ParentExternalId	Delete	Data Columns				
2	Information for each record is entered in these rows									
3										
4										
5										



CAUTION: Validation Errors. Editing values in the top row of a template file results in validation errors when uploading the file. Do not edit values in the top row of a template file.

To create an upload file:

1. After downloading the appropriate template, open the file in Microsoft Excel or a compatible spreadsheet program.
2. Enter each user's information in a separate row. Be sure to adhere to the field requirements described in the appropriate table provided.
Note: Upload templates are case-sensitive. Data must be entered as standard text. Any formatting, such as boldface, highlighting, or italics, will be lost during the upload.
 - To delete a user role, enter "DELETE" in the Delete column for that user role. *Note: This only deletes the user's role association. You must delete the user itself via the **Create/Modify Users** task.*
 - To modify an existing user role, enter the new information for that user role. The old user role will be replaced upon uploading the file. To modify the key value of a user role (e.g., the email address of a user role), you must delete the original user role and create a new one.
3. Save the upload file in one of the following file formats: CSV, XLS, XLSX, or TXT. After the file is saved, you can upload it to ART.

Upload users.

You can add, modify, or delete users by uploading a file to ART. You can also add multiple user role and entity associations for a single user role.

To upload a user file:

1. Download the User template.
2. Using [Table 3](#) as a reference, enter a row of information for each user role you want to add, modify, or delete.
 - a. To delete an existing user role, enter "DELETE" in the Delete column. *Note: This only deletes the user's role association. You must delete the user itself via the **Create/Modify Users** task.*
 - b. If you want to replace a user role, you must delete the original user role and then create a new one, otherwise the system may regard the new row as an additional role.
3. On the ART home screen, click [**Upload Institutions, Users and Students**].
4. Select "Users" as the file upload type from the *Entity* drop-down list.
5. Upload the user file.

[Table 3](#) describes the columns in the user file and lists acceptable values in **bold type**. These columns also correspond with the fields on the **Add User Information** screen. Columns marked with an asterisk (*) are required for add or modify actions; columns marked with a plus (+) are required for delete actions. *Note: Some of the labels on the user template differ from those on the Add User Information screen. The unique labels from the Add User Information screen are listed in parentheses below the labels from the template.*

Table 3. Upload User File Requirements

Column	Description
FirstName*	User's first name. Up to 35 characters.
LastOrSurname* (Last Name)	User's last name. Up to 35 characters.
ElectronicMailAddress** (Email Address)	User's email address. Up to 128 characters in standard email address format.
TelephoneNumber	Telephone number including the area code, and optional extension. Up to 24 characters in XXX-XXX-XXXX xNNNNNN or XXX-XXX-XXXX xNNNNNN format.
Role*	Role assigned to the user. For provisioning the Digital Library the correct role is "DL_EndUser". For Coordinators choose, "State Coordinator", "District Coordinator", or "School Coordinator". Up to 30 characters. <i>All coordinators should also be end-users. To assign multiple roles, use one line in the spreadsheet per role. FirstName, LastOrSurname, ElectronicMailAddress, and TelephoneNumber (if included) should be the same for all lines applying to the same user.</i>
AssociatedEntityID*	Identifier of entity associated with the user. The entity is typically a state, district, or institution. (Schools are classified as institutions). If you don't know the correct entity ID you can use the search features in ART to look it up. For states, the ID is the two-letter state abbreviation and is the same value as the StateAbbreviation field. Up to 20 characters.
Level* (Responsible Entity Type)	User-role combination's parent in the Consortium's hierarchy. This is the type of the entity listed in "AssociatedEntityID" In most cases, it will be "STATE", "DISTRICT", or "INSTITUTION".
StateAbbreviation* (State)	<ul style="list-style-type: none"> State with which the user is associated.
Delete+	Flag for deleting the user-role combination. <ul style="list-style-type: none"> DELETE—Delete the user-role combination associated with the ElectronicMailAddress. <blank>—Add the new user role or modify an existing one.

Creating/Modifying Individual User Accounts.

The **Create/Modify** task in ART allows you to add, modify, and delete individual user accounts. You can also use these screens to search for and export user accounts.

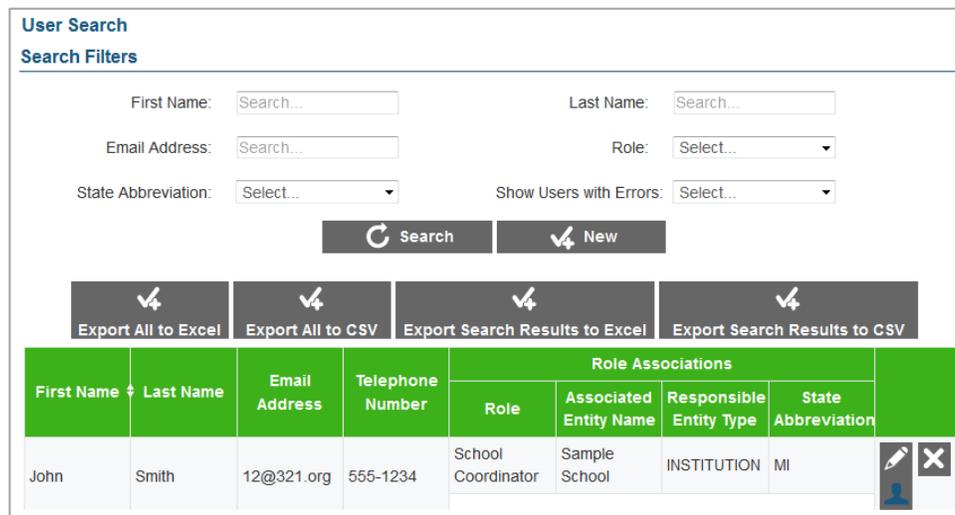
For a given user, the fields displayed on the **Add User Information** and **Edit User Information** screens correspond with the data columns included in the template used to upload user roles. Column labels on the template use CamelCase, while fields on the **Add User Information** and **Edit User Information** screens use Title Case. Otherwise, these labels are usually identical.



The “Delete” column in upload templates does not have a corresponding field on the **Add User Information** and **Edit User Information** screens, because individual user accounts are deleted directly from the search results table on their **Create/Modify** screen.

Create or modify user information.

Figure 11. User Search Screen



User Search
Search Filters

First Name: Last Name:

Email Address: Role:

State Abbreviation: Show Users with Errors:

First Name	Last Name	Email Address	Telephone Number	Role Associations				
				Role	Associated Entity Name	Responsible Entity Type	State Abbreviation	
John	Smith	12@321.org	555-1234	School Coordinator	Sample School	INSTITUTION	MI	

To create a user and a user role:

1. On the ART home screen, click **[Create/Modify Users]**.
2. On the **User Search** screen, click **[New]**.
3. On the **Add User Information** screen, enter the information for the user in the provided fields.
4. To associate the user with a role, do the following:
 - a. Click  in the *Role Associations* section.
 - b. Select options from the drop-down menus provided in this section.
5. Click **[Save]**.

To modify user information:

1. On the **User Search** screen, search for a particular user.
2. On the search results table, click [] to edit a particular user.
3. On the **Edit User Information** screen, modify the information for the user in the provided fields. For an explanation of these fields, see [Table 3](#).
4. To associate the user with a role, do the following:
5. Click [] in the *Role Associations* section.
 - a. Select options from the drop-down menus provided in this section.
 - b. To remove a role association, click [] next to that role.
6. Click [**Save**].

To delete a user account:

1. On the **User Search** screen, search for a particular user.
2. On the search results table, click [] for the user you want to delete.
3. In the warning box that pops up, click [**OK**].