New LEA Checklist

TABLE OF CONTENTS

UNDERSTANDING ADFS

Active Directory Federation Services (**ADFS**) is a software component developed by Microsoft Corporation that provides users with single sign-on access to systems and applications located across organizational boundaries.

This means that the same login information (name and password), used to authenticate for authorization to access local district applications will be used to authenticate for authorization to access State Department of Education (SDE) applications. This also means that the district manages account logins and passwords for access to the SDE applications, rather than the SDE.

New users in Districts set up with ADFS do not need to register a username and password with the SDE. Instead, they will use their district-provided username and login to access authorized SDE applications.

This checklist provides a separate list for each scenario.

NEW SUPERINTENDENT/CHARTER ADMINISTRATOR CHECKLIST FOR ADFS DISTRICTS

- ☐ Login to the SDE Applications Portal
  - o Although the user will not yet have access to SDE applications, this step is necessary to allow mapping the user to their email address
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the SDE Applications Portal tile

- ☐ New Superintendent to complete and email the Access Authorization form
  - o Form can be found on the ISEE homepage under **Program Information**
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on plus sign (+) next to Program Information
    - ▪ Click on Access Authorizations link
  - o Identify District Superintendent
  - o Identify Delegate for District Superintendent
  - o E-mail completed form to support@sde.idaho.gov
  - o SDE support will then provision the new Superintendent

- ☐ Once provisioned, login to the SDE Applications Portal
  - o Contact the district technology director if additional application access is needed

NEW SUPERINTENDENT/CHARTER ADMINISTRATOR CHECKLIST FOR NON-ADFS DISTRICTS

- ☐ Complete and email the Access Authorization form
  - o Form can be found on the ISEE homepage under **Program Information**
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on plus sign (+) next to Program Information
    - ▪ Click on Access Authorizations link
  - o Identify District Superintendent
  - o Identify Delegate for District Superintendent
  - o E-mail completed form to support@sde.idaho.gov
  - o SDE support will then provision the new Superintendent

- ☐ Register for access to the SDE Applications Portal
  - o Directions can be found on the ISEE homepage under the **Training** tab
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the Training tab
    - ▪ Click on Registering as a New User

- Once provisioned and registered, login to the SDE Applications Portal
  - Directions can be found on the ISEE homepage under the **Training** tab
    - www.sde.idaho.gov/
    - Click on the ISEE tile
    - Click on the Training tab
    - Click on New SDE Applications User
  - Contact the district technology director if additional application access is needed

NEW DELEGATE TO THE SUPERINTENDENT/CHARTER ADMINISTRATOR CHECKLIST – ADFS DISTRICTS

- ☐ Login to the SDE Applications Portal
  - o Although the user will not yet have access to SDE applications, this step is necessary to map the user to their email address
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the SDE Applications Portal tile

- ☐ Superintendent to complete and email the Access Authorization form
  - o Form can be found on the ISEE homepage under **Program Information**
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on plus sign (+) next to Program Information
    - ▪ Click on Access Authorizations link
  - o Identify Delegate for District Superintendent
  - o E-mail completed form to support@sde.idaho.gov
  - o SDE support will then provision the new Delegate

- ☐ Once provisioned, login to the SDE Applications Portal
  - o Contact the district technology director if additional application access is needed

NEW DELEGATE TO THE SUPERINTENDENT/CHARTER ADMINISTRATOR CHECKLIST – NON-ADFS DISTRICTS

- ☐ Superintendent to complete and email the Access Authorization form
  - o Form can be found on the ISEE homepage under **Program Information**
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on plus sign (+) next to Program Information
    - ▪ Click on Access Authorizations link
  - o Identify Delegate for District Superintendent
  - o E-mail completed form to support@sde.idaho.gov
  - o SDE support will then provision the new Delegate

- ☐ Register for access to the SDE Applications Portal
  - o Directions can be found on the ISEE homepage under the **Training** tab
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the Training tab
    - ▪ Click on Registering as a New User

☐ Once provisioned and registered, login to the SDE Applications Portal
- o Directions can be found on the ISEE homepage under the **Training** tab
  - ▪ www.sde.idaho.gov/
  - ▪ Click on the ISEE tile
  - ▪ Click on the Training tab
  - ▪ Click on New SDE Applications User
- o Contact the district technology director if additional application access is needed

NEW TECHNOLOGY DIRECTOR CHECKLIST – ADFS DISTRICTS

- ☐ Login to the SDE Applications Portal
    - o Although the user will not yet have access to SDE applications, this step is necessary to map the user to their email address
        - ▪ www.sde.idaho.gov/
        - ▪ Click on the ISEE tile

- ☐ Superintendent or Delegate to assign Technology Director role in the Administration Tool
    - o Directions can be found for assigning roles in the Administration Tool on the ISEE homepage under the Training tab
        - ▪ www.sde.idaho.gov/
        - ▪ Click on the ISEE tile
        - ▪ Click on the Training tab
        - ▪ Click on Administration Tool Application

- ☐ Once assigned, login to the SDE Applications Portal
    - o Assign additional roles as needed

- ☐ Technology Directors are provisioned to assign roles to other district users

NEW TECHNOLOGY DIRECTOR CHECKLIST – NON-ADFS DISTRICTS

- ☐ Register for access to the SDE Applications Portal
    - o Directions can be found on the ISEE homepage under the **Training** tab
        - ▪ www.sde.idaho.gov/
        - ▪ Click on the ISEE tile
        - ▪ Click on the Training tab
        - ▪ Click on New SDE Applications User

- ☐ Superintendent or Delegate must map (Person Assignment) the new user in the Administration Tool
    - o Directions can be found for mapping a new user (Person Assignment) in the Administration Tool on the ISEE homepage under the Training tab
        - ▪ www.sde.idaho.gov/
        - ▪ Click on the ISEE tile
        - ▪ Click on the Training tab
        - ▪ Click on Administration Tool Application

- ☐ Superintendent or Delegate must assign Technology Director role in the Administration Tool
    - o Directions can be found for assigning roles in the Administration Tool on the ISEE homepage under the Training tab
        - ▪ www.sde.idaho.gov/

- Click on the ISEE tile
- Click on the Training tab
- Click on Administration Tool Application

☐ Once assigned, login to the SDE Applications Portal
- o Assign additional roles as needed

☐ Technology Directors are provisioned to assign roles to other district users

NEW STATE REPORTING MANAGER (SRM) USER CHECKLIST – ADFS DISTRICTS

- ☐ Login to the SDE Applications Portal
  - o Although the user will not yet have access to SDE applications, this step is necessary to map the user to their email address
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile

- ☐ Superintendent or Delegate to the Superintendent to submit an OTIS ticket to provision new SRM user
  - o Directions can be found for submitting an OTIS ticket on the ISEE homepage under the Training tab
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the Training tab
    - ▪ Click on Submitting an OTIS ticket

- ☐ Once assigned, login to the SDE Applications Portal

NEW STATE REPORTING MANAGER (SRM) USER CHECKLIST – NON-ADFS DISTRICTS

- ☐ Register for access to the SDE Applications Portal
  - o Directions can be found on the ISEE homepage under the **Training** tab
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the Training tab
    - ▪ Click on New SDE Applications User

- ☐ Superintendent or Delegate must map (Person Assignment) the new user in the Administration Tool
  - o Directions can be found for mapping a new user (Person Assignment) in the Administration Tool on the ISEE homepage under the Training tab
    - ▪ www.sde.idaho.gov/
    - ▪ Click on the ISEE tile
    - ▪ Click on the Training tab
    - ▪ Click on Administration Tool Application

- ☐ Superintendent, Delegate to the Superintendent, or the Technology Director to submit an OTIS ticket to provision new SRM user
  - o Directions can be found for submitting an OTIS ticket on the ISEE homepage under the Training tab

- www.sde.idaho.gov/
- Click on the ISEE tile
- Click on the Training tab
- Click on Submitting an OTIS ticket

☐ Once assigned, login to the SDE Applications Portal

NEW SDE APPLICATION PORTAL USER CHECKLIST – ADFS DISTRICTS

☐ Login to the SDE Applications Portal
- o Although the user will not yet have access to SDE applications, this step is necessary to map the user to their email address
  - www.sde.idaho.gov/
  - Click on the ISEE tile

☐ Superintendent, Delegate to the Superintendent, or the Technology Director to assign applicable role(s) in the Administration Tool
- o Directions can be found for assigning roles in the Administration Tool on the ISEE homepage under the Training tab
  - www.sde.idaho.gov/
  - Click on the ISEE tile
  - Click on the Training tab
  - Click on Administration Tool Application

☐ Once assigned, login to the SDE Applications Portal

NEW SDE APPLICATION PORTAL USER CHECKLIST – NON-ADFS DISTRICTS

☐ Register for access to the SDE Applications Portal
- o Directions can be found on the ISEE homepage under the **Training** tab
  - www.sde.idaho.gov/
  - Click on the ISEE tile
  - Click on the Training tab
  - Click on New SDE Applications User

☐ Superintendent or Delegate must map (Person Assignment) new user in the Administration Tool
- o Directions can be found for mapping a new user (Person Assignment) in the Administration Tool on the ISEE homepage under the Training tab
  - www.sde.idaho.gov/
  - Click on the ISEE tile
  - Click on the Training tab

- Click on Administration Tool Application

□ Superintendent, Delegate to the Superintendent, or the Technology Director to assign applicable role(s) in the Administration Tool
  o Directions can be found for assigning roles in the Administration Tool on the ISEE homepage under the Training tab
    - www.sde.idaho.gov/
    - Click on the ISEE tile
    - Click on the Training tab
    - Click on Administration Tool Application
  o Once assigned, login to the SDE Applications Portal

ASSISTANCE

SDE Tech Support
Support@sde.idaho.gov
208.332.6987