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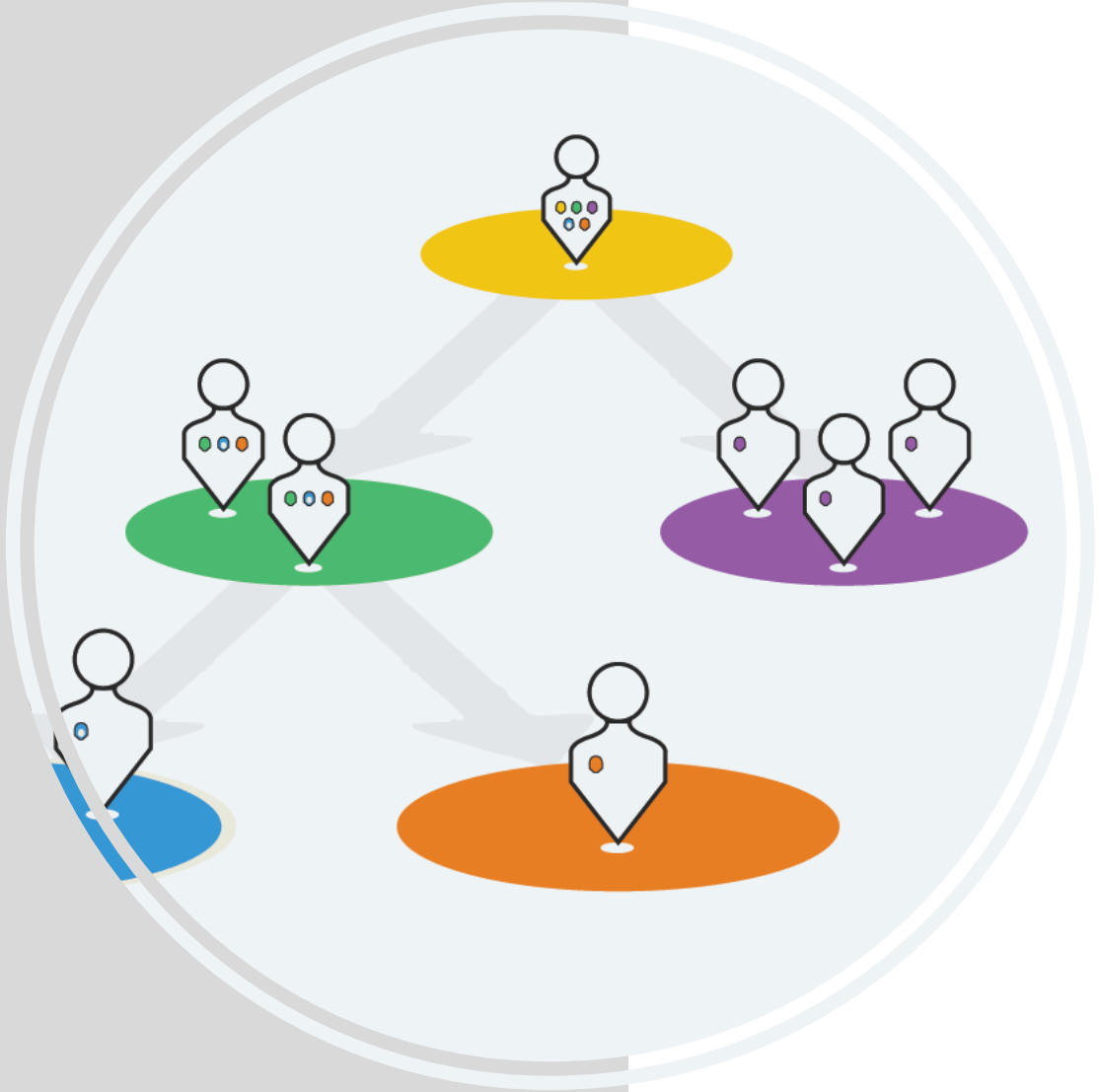


Reimagining user groups and tool rights

How to overhaul your SIS to better protect student data

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Reimagining user groups and tool rights

- Account Cleanup
- User Tools Inventory
- User Rights Matrix
- Automations & Integrations
- Testing, Implementation, & Maintenance

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Let’s get started!

- The problem…
  - System launched in Fall 2012 with no process for user account/rights cleanup
  - User groups designed by staff without consulting legal/data privacy (after Ed Law 2-D)
  - User rights “upgrades” provided by phone call/email of any administrator
  - No deactivation of user groups/tool rights when moving positions/locations
  - No deactivation process for “Local” Accounts



Let’s get started!

- The scope of the problem…
  - Active Staff Accounts vs. Active Employees (provided SIS access): **8,566 vs. 4,500 (approx.)**
  - Active Accounts Not-In-Use: **2,392**
  - Active Accounts Never Used: **778**
  - Active “Local” Accounts (no MFA): **1,018**
  - Active “Local” Accounts not accessed for 12+ months: **442**
  - User Groups: **120**
  - Empty User Groups: **58**
  - Users Assigned Individual Tools (outside of User Groups): **135**

Account Cleanup

Remove Unused User Accounts

Only current in-use accounts should remain active

Remove Unused/Redundant User Groups

Only user groups that serve a purpose should remain

Identify Individual Tool Rights

Only use individual tool rights when there is no alternative (some tools may not be able to be assigned via user groups)

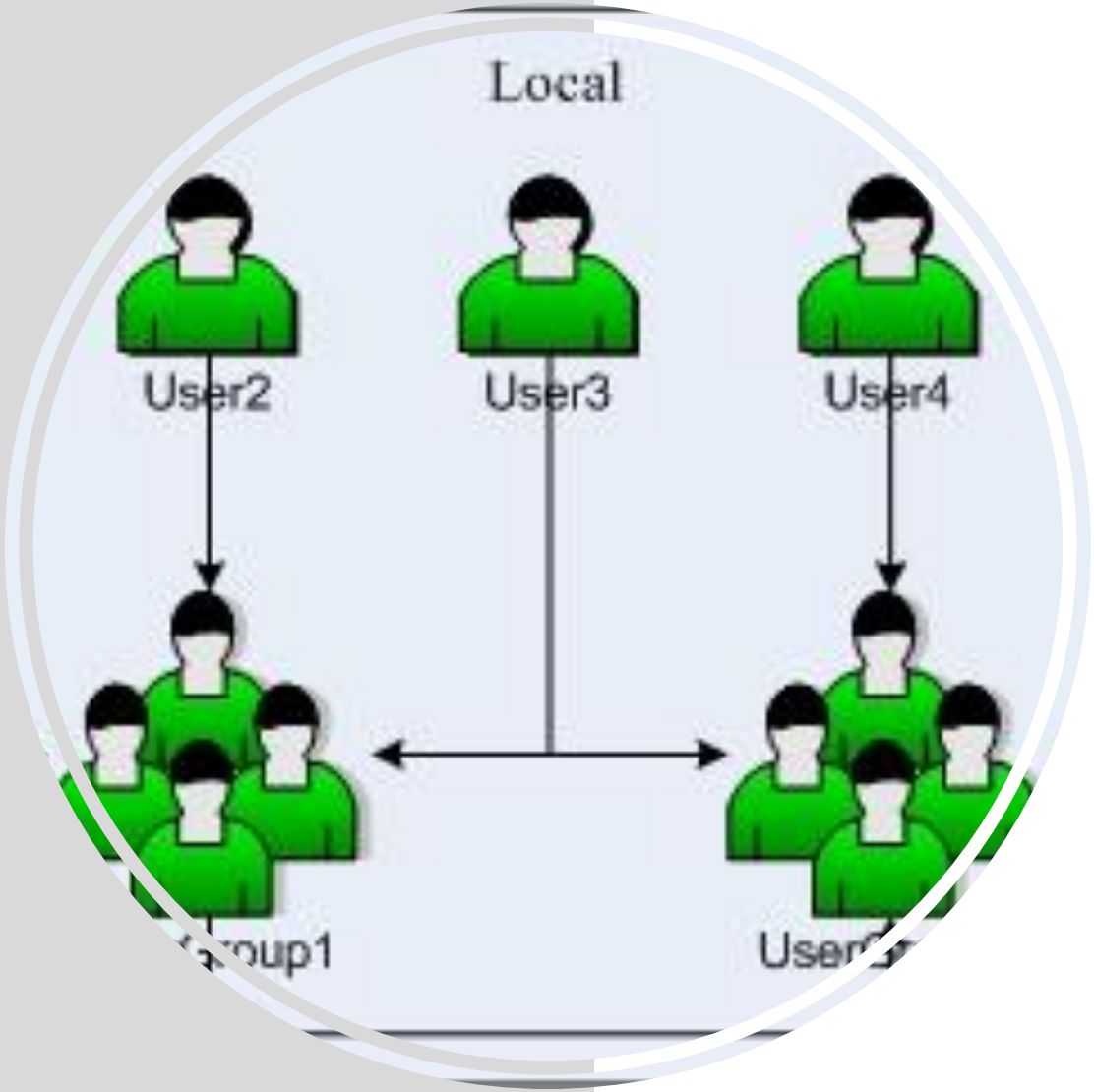




Remove Unused Accounts

Cleanup unused accounts

- Deactivate all user accounts no accessed within specific number of days
- Remove all user groups, individual tools and calendar rights from deactivated accounts
- Automate via scripting when possible



Remove Unused/ Redundant Groups

Cleanup user groups

- Remove any user groups without active members
- Ensure that naming conventions accurately reflect the group membership
- Ensure that all user groups have an accurate updated description



Remove Individual Tool Rights

Non-user group scenarios

- Create user groups for all tool rights that can be assigned via group permissions
- Ensure that individual tool rights are replaced with group-based rights when possible
- Track all exceptions that require the assigning of an individual tool right by staff member and job title/code

User Tools Inventory

Inventory Tools

Discover the tools exist in your SIS

Define Tools

Understand what each tool does

Evaluate Tools

Decide which tools are needed





Inventory Tools

Develop a list of tools

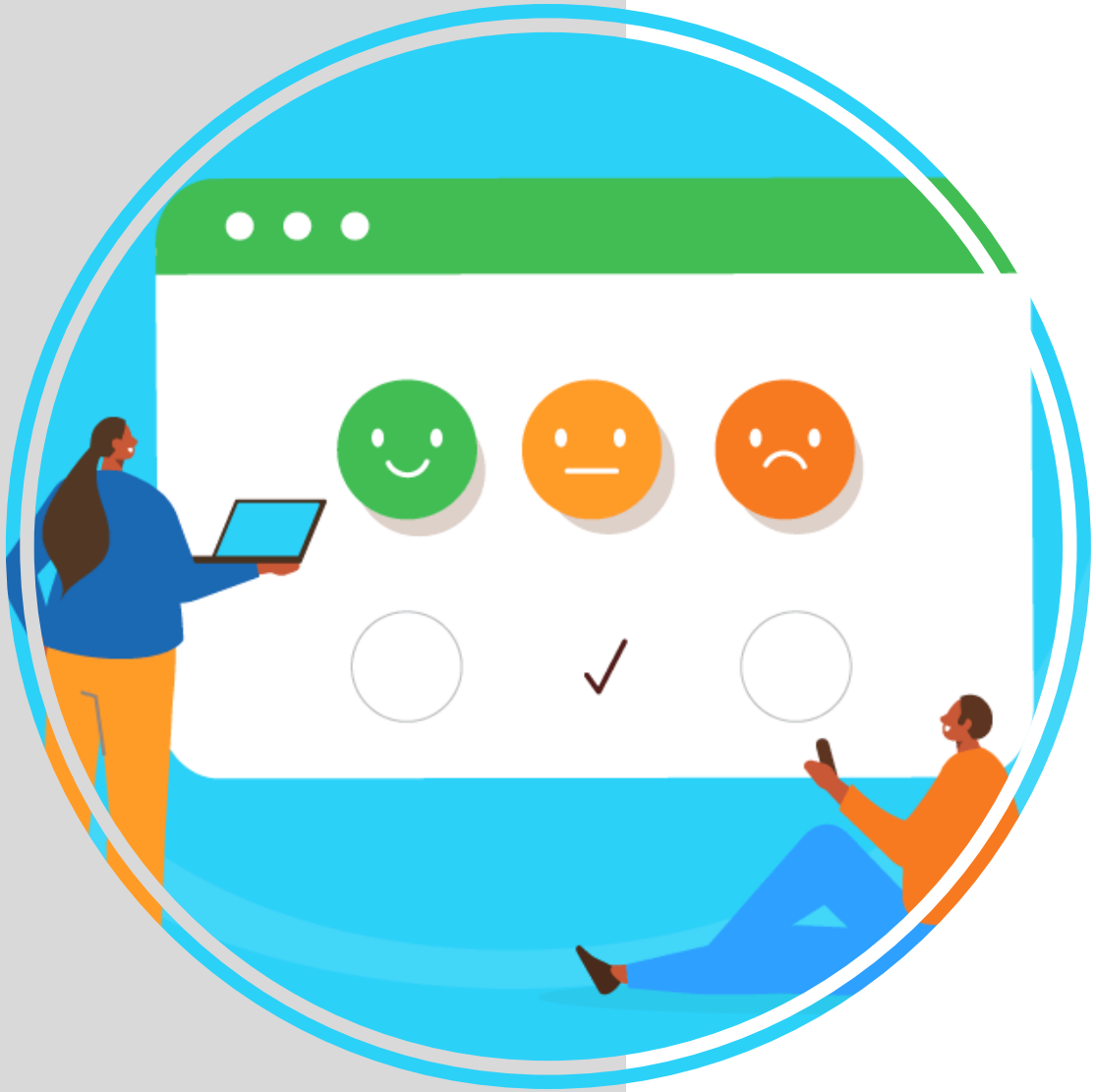
- List all tools available to all users
- Note which tools are available to your users (state-specific/product-specific tools)
- Note which tools have Read, Write, Edit, and Delete or All rights



Define Tools

Define what each tool does

- Note the purpose of the tool
- Note which users will need the tool
- Note which tools are unnecessary to implement



Evaluate Tools

Choose the tools you need

- Create a list of the tools that your school needs
- Create a list of tools that exist in your SIS that you do not intend on using
- Create a list of tools that cannot must be assigned by individual user and not by user group

User Matrix

Define “Base” User Group

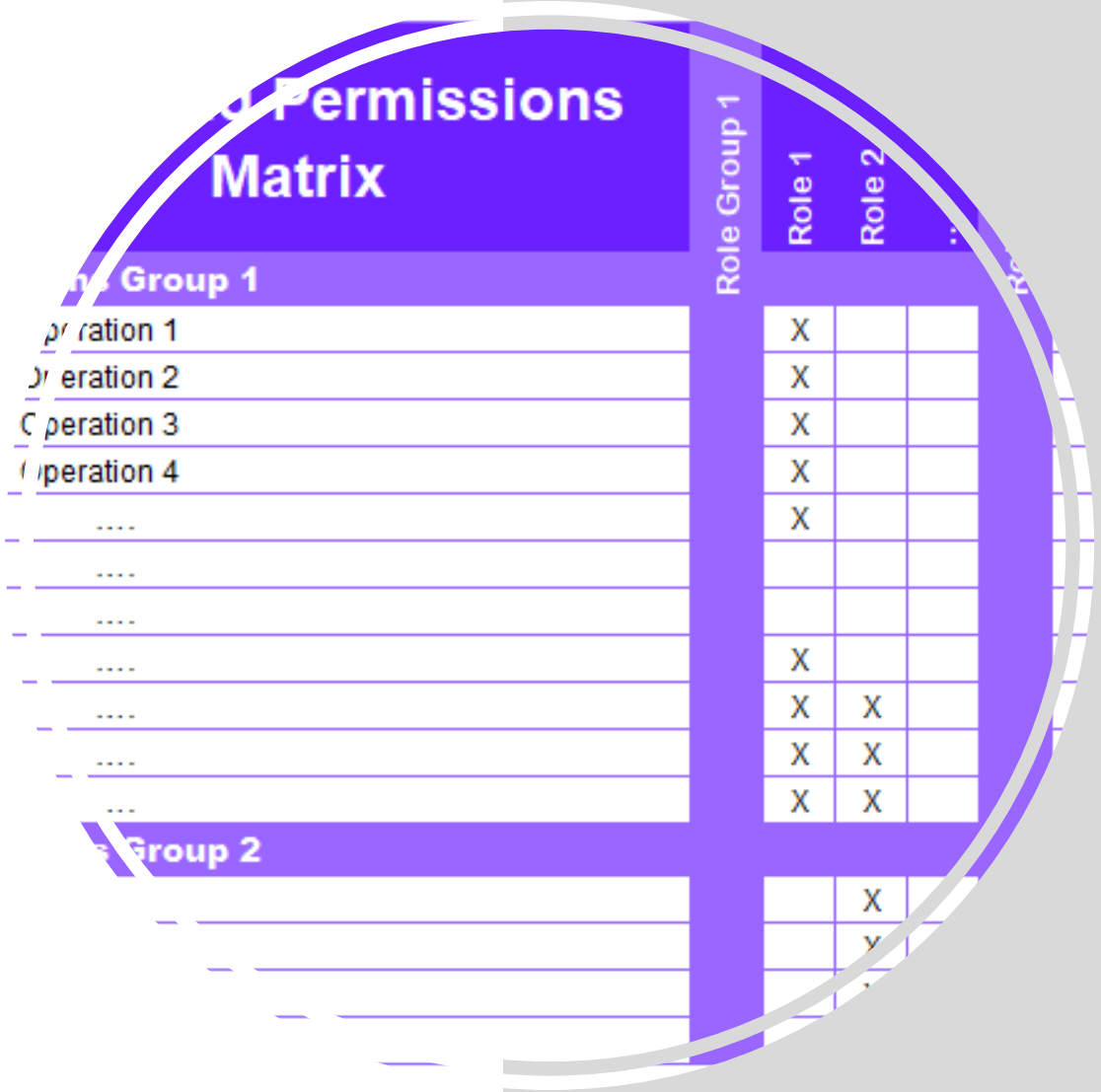
Decide which tools all staff will need

Define Stacks

Decide large groups and which tools to stack

Define Smallest User Groups

Decide which tools are needed only by smaller teams by departments





Define ”Base” User Group

Decide which tools are essential

- Decide which user rights ALL USERS need
- Ensure that you are using the principle of least privilege
- Decide how school calendars (i.e., locations) and school years (i.e., current data vs. historical data) access interacts with user groups (teachers assigned to current year calendar for their building but central office assigned to all years and all calendars for historical data)



Define Stacks

Group user rights from bottom to top

- Create a list of types of users: teachers, building admin, central office, etc.
- Decide which tools to assign to each group based on principle of least privilege
- Decide which levels can be grouped together based on similar job functions: i.e., teachers (SPED, PE, Art) vs. building administrators (principals, assistant principals, deans) vs. central office (security, HR, accountability)



Define Smallest User Groups

Limit tools by specific areas

- Create user groups for specific departments or teams (i.e., SPED central office vs transportation central office)
- Survey central office departments to inform your decisions about what data each department may (or more importantly may not) need to access regularly
- Create an “Individual Tool Rights” and “Individual Calendar Rights” user group to easily identify any staff assigned those tools that are not allowed to be assigned by user groups (i.e., Combine Person Wizard or an afterschool principal)

Automations & Integrations

Integrating Systems

Find ways to integrate data from other systems

Automating Processes

Using scripts to automate tasks

Simplifying Solutions

Workflow Suite

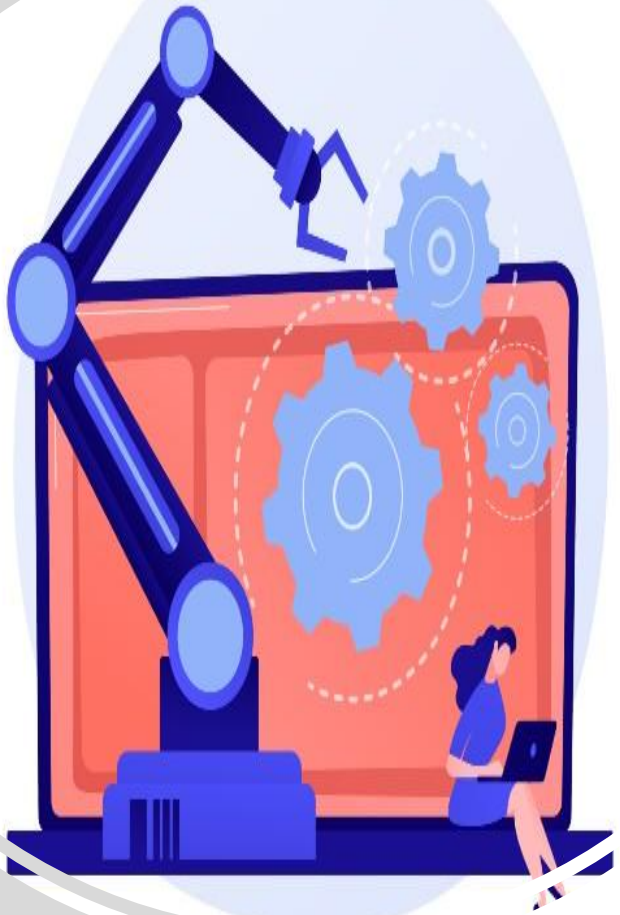




Integrating Systems

Using data from other systems

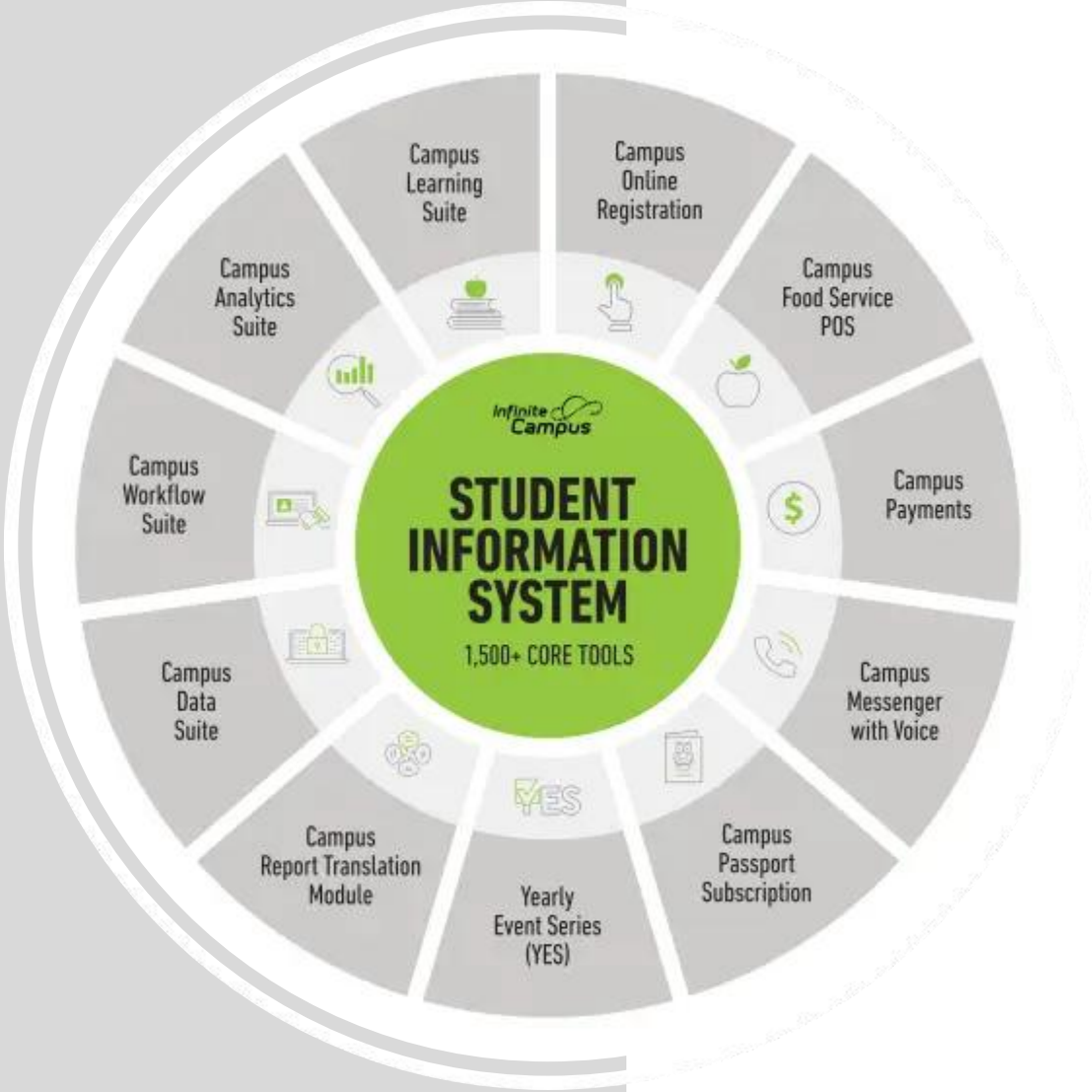
- Human Resources didn’t plug-in but scripts uploaded a table to the backend nightly
- Revised user groups were compared to eDoctrina user groups for instructional staff and administrators
- Microsoft MFA for SAML logins



Automating Processes

Using tasks and scripts

- Created custom script to deactivate any account not used within 12-months (propose shortening to 3-months for staff and 30-days for vendors after initial launch)
- Created custom script to provide district assignments to travelling nurses at all school locations based on group membership (if/then)
- Created a task to move all staff user accounts marked “Disable Account” to ALL DEACTIVATED USERS group to avoid orphaned accounts



Simplifying Solutions

Workflow Suite

- District was able to upgrade to IC Workflow suite
- Custom providing training on using events and actions
- Creating a custom workflow to create new users, assign user groups and calendars based on job codes from the nightly refresh table from our HR system (hopefully feed that info into Business Office module; and next step is to automate vendors using tables from the backend too

Testing, Implementation, & Maintenance

Test Your Solutions

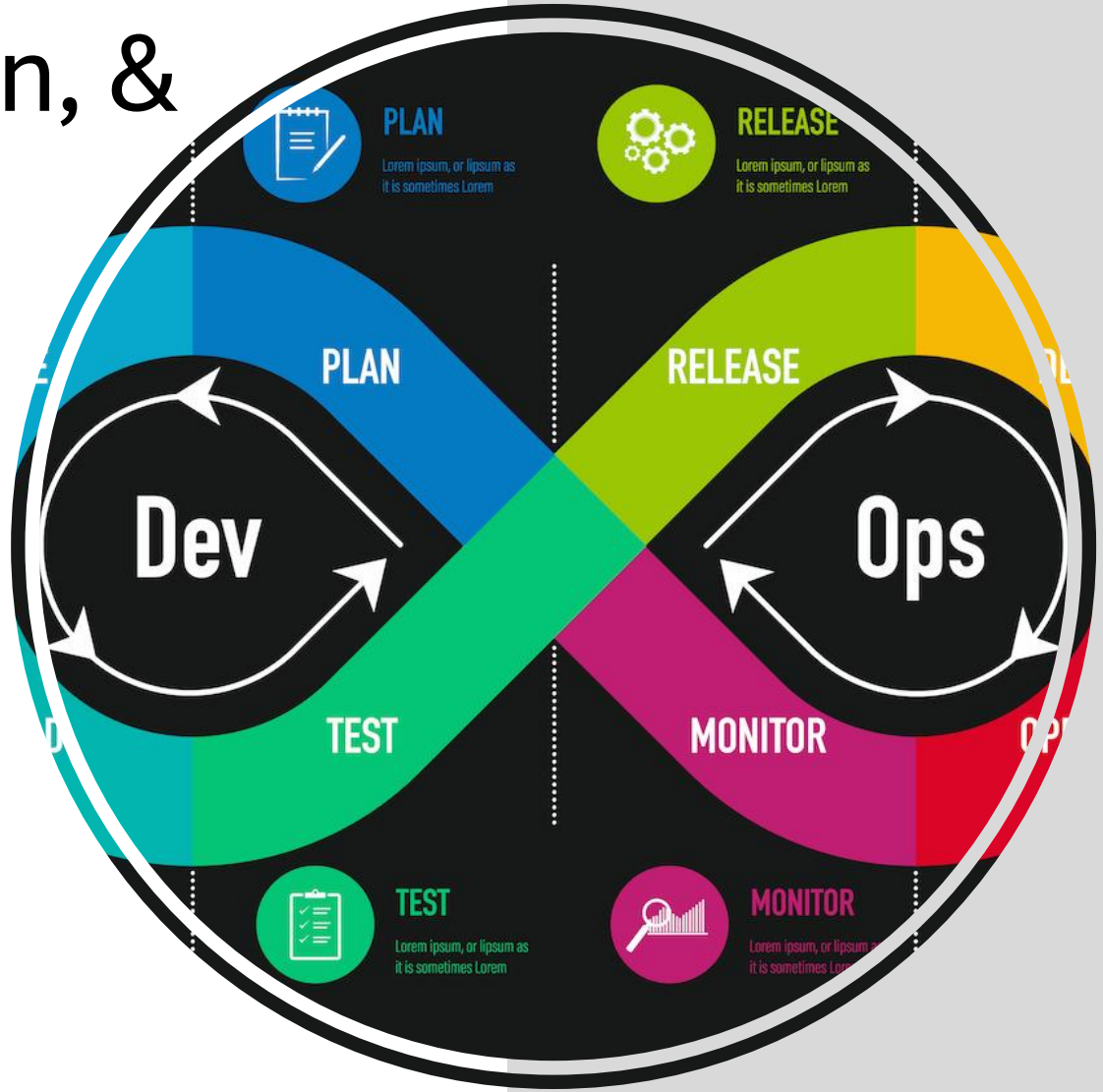
Leverage your staging site to test automations/integrations

Implement Your Process

Go live and make real-time adjustments before the first day of school

Maintain Your Product

Periodically review the results to avoid future issues





Test Your Solutions

Leveraging Sandbox/Staging Sites

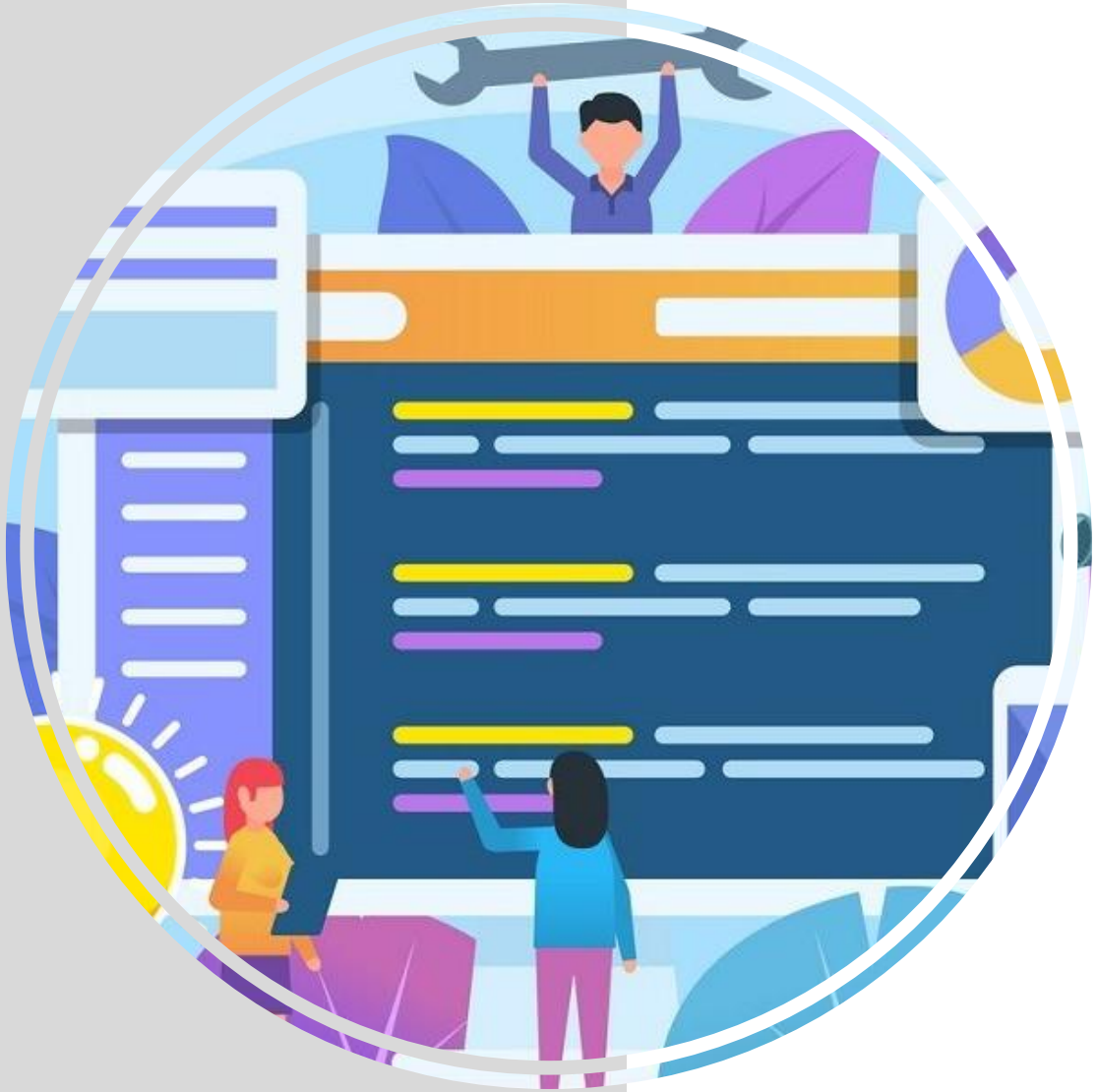
- Push to staging site to test automations, scripts, workflows to see if they behave as planned
- Run in your Sandbox site for a few weeks to catch any last minute ”unknowns”
- Adjust as needed and learn from missteps



Implement Your Process

Going Live!

- Communicate to end users about upcoming changes
- Select a time of year when students will not be impacted
- Be ready to troubleshoot and create exceptions; there will be oversights and adjustments when standing up your project



Maintain Your Product

Continuous Improvement Cycle

- At-minimum annually review your user groups tool rights
- Update user groups based on release notes when user tools, modules, calendars, etc. might be impacted
- Continue to stay apprised of changes in educational laws governing student data

Session Surveys

We want your feedback!

Submit session surveys for a chance to win a **Yeti FLIP 8** Cooler



Thank You!

Infinite Campus