



Users Guide

August 2017



Table of Contents

- Overview 2**
 - Who Should Use This Manual? 2
 - What is PBISApps?. 2
 - What is the SWIS Suite?. 2
 - What is DataLink? 2
 - How Does DataLink Work? 2
 - Who are DataLink Users? 2
- Log In/Log Out 3**
- The Participation Manager 3**
 - Set and Edit Uploaded Data Types 3
 - Invite Districts and Schools 4
 - Send a District Invite 4
 - Send a School Invite 4
 - View My Districts and My Schools Details 5
 - API Management for Uploaders 5
 - Notification Emails 5
- DataLink Personal Account Settings 6**
 - Switch Between DataLink Roles 6
 - Set or Add a Primary Contact Email Address 6
 - Change Password 7
- SWIS Suite DataLink Features 7**
 - Identify DataLink Schools in the School Select 7
 - DataLink Participation Notice in the SWIS Suite 7
 - Opted In, Not Ready 7
 - Opted In, About to Start 7
 - Opted In, Uploading Data 8
 - DataLink Participation Overview 8
 - Upload History 8
 - Live Upload Status 8
 - SWIS Data Entry with DataLink. 8
- Data Integrity 8**

Overview

Who Should Use This Manual?

The DataLink User's Manual provides DataLink customers and SWIS subscribers a quick reference for how to use the Participation Manager as well as how to use the SWIS application while uploading data with DataLink. This manual is for use by SWIS subscribers and facilitators and DataLink uploaders and technical contacts during initial setup and on-going use.

What is PBISApps?

PBISApps is a not-for profit group developed and operated by Educational and Community Supports (ECS), a research unit at the University of Oregon. The PBISApps team manages a series of educational tools related to the implementation of multi-tiered systems of support (MTSS). These tools include the School-Wide Information System (SWIS) Suite, PBIS Assessment, and PBIS Evaluation. These applications have been implemented in more than 25,000 schools in the US and abroad. PBISApps has been making schools safer and more productive places for over 10 years by empowering educators to make data-driven decisions as problems emerge.

What is the SWIS Suite?

The SWIS Suite – a set of four applications (SWIS, CICO-SWIS, ISIS-SWIS, and SAMI) – is a reliable, confidential, web-based information system built to collect, summarize, and use student behavior data for decision making. Research demonstrates that educators can make more effective and efficient decisions when they have the right data in the right format at the right time. The SWIS Suite provides school/facility personnel with the information they need to be successful decision makers.

What is DataLink?

DataLink connects the SWIS Suite with a district's student information system (SIS) by transferring student, staff, and referral data from the SIS to SWIS. With DataLink, schools enter data into one place, retain consistency across applications, and protect data quality.

How Does DataLink Work?

Districts, schools, and facilities work together to upload data to individual SWIS accounts. The uploading organization downloads a data file from the SIS and sends it to PBISApps. Schools choose which data they agree to upload to their SWIS accounts, if they choose participate at all. Data upload at regularly scheduled times to make sure SWIS accounts are as current as possible for decision making.

Here is how the setup and ongoing process works:

1. Once an uploader sets up its DataLink account and tests files to be sure all data upload correctly, districts receive and invitation.
2. District Authorizers invite schools to participate.
3. Schools choose to participate or not by selecting the data to upload: All, some or none.
4. Once there are no data integrity errors in school SWIS accounts preventing uploads, data transfer from the SIS to SWIS at the next regularly scheduled time.

Who are DataLink Users?

There are three primary roles specific to the DataLink process. *Note: In some cases, the Uploader and the District Authorizer may be the same person as some districts manage their own DataLink integration.*

- **Uploader:** The person responsible for selecting which data types to include in data files, sending data files, and troubleshooting any technical difficulties with the integration process.
- **District Authorizer:** The district person with the authority to approve which data types to include in the data file for schools in its jurisdiction.
- **School Administrator:** The person at the school with the authority to choose whether or not to participate in DataLink and which data to upload to the SWIS account.

Log In/Log Out

To log in to PBISApps and the Participation Manager:

1. From your preferred internet browser (e.g., Internet Explorer, Firefox, Safari, Chrome), type in the website address www.pbisapps.org to access PBISApps.

2. Click on PBIS Applications Login located in the black bar (app bar) at the top of the screen.
3. Enter the email address and password associated with DataLink usage.
4. Click Login.
5. Once logged in, slide over to the left side of the app bar and click on PBIS DataLink to access Participation Manager.

To log out of PBISApps and the Participation Manager:

1. Click on the user's name located in the app bar at the top of the screen.
2. Click Logout

HERE'S A TIP

Your PBISApps login gets you into any of the applications you use. DataLink is no different. Log in to view your DataLink information using the same email address and password you would use to access the SWIS Suite, PBIS Assessment, or PBIS Evaluation. If DataLink is the only application you use, information about how to create a username and password will be sent to you in your DataLink welcome email.

The Participation Manager

The Participation Manager is where organizations invite each other to participate in DataLink, and where everyone selects which data to upload (if any data will be uploaded at all).

Set and Edit Uploaded Data Types

Everyone participating in DataLink – uploaders, district authorizers, and school administrators – selects which data to send from the SIS to individual SWIS accounts. Whether they select to upload all, some, or no data, this is what the selection means:

- **Send No Data:** Opt out of uploading any data to SWIS Suite accounts. Selecting this option requires SWIS subscribers to enter all data into SWIS manually.

- **Only People:** Upload student and staff rosters. As new students and staff need to be added, DataLink makes all of the necessary changes to match the SIS automatically. Selecting this option requires SWIS subscribers to enter all referrals manually.
- **People & Major:** Upload student/staff rosters and all major office discipline referrals at regularly scheduled times. Selecting this option requires SWIS subscribers to enter all minor referrals manually.
- **All:** Upload student/staff rosters as well as all major and minor referrals at regularly scheduled times. Selecting this option requires SWIS subscribers to enter no data directly into SWIS.

To set the uploaded data type for your account:

1. Click the Set Uploaded Data Types menu located at the top of the screen.
2. Check the box next to the data types matching the information authorized to be included in DataLink upload files.
3. Click Save to confirm the participation level. Click Cancel to return to the Set Uploaded Data Types workspace.

To edit uploaded data types:

1. Click the Set Uploaded Data Types menu located at the top of the screen.
2. Click Edit.
3. Check the box next to the data types to include in DataLink upload files.
4. Click Save to confirm the change. Click Cancel to return to the Set Uploaded Data Types workspace..

HERE'S A TIP

If your uploading organization adds a new type of data it can upload to SWIS, you'll receive an email asking if you'd like to add that data type to your implementation. Just come back to the Participation Manager and add it to the types you upload to SWIS.

Invite Districts and Schools

Uploaders and District Authorizers invite others to participate. Uploaders invite districts. Districts invite schools. No one participates without an invitation.

Send a District Invite

Uploaders invite districts to participate in DataLink by clicking the My Districts menu located at the top of the screen. Displayed in this workspace is a list of districts identified on the profile form submitted at the beginning of the setup process. By default, each district's participation is toggled to Off.

Invited districts accept an invitation by setting the uploaded data types to anything other than Send No Data. Their participation appears on the My Districts page under the district name where it says: Participation Level.

To invite a district to participate in DataLink, click the My Districts menu at the top of the screen:

1. Locate the district to invite and click the DataLink Setup Off button to toggle it to DataLink Setup On.
2. Click the View Details button listed for that district.
3. Add a District Authorizer if one does not exist (See the tip on this page for how to add a district authorizer).
4. Click Send Invite.
5. Click Send to confirm sending the invitation. Click Cancel to return to the View Details page.
6. Participation Manager sends an email invitation to the District Authorizer to participate in the DataLink integration.

HERE'S A TIP

To add a District Authorizer:

1. From My Districts, click the View Details button listed next to the authorizer's district.
2. Click Add in the DataLink District Authorizer section to search for the district's authorizer.
3. Enter the person's first name, last name, and/or email address in the fields provided.
Note: Searching with an email address will search for anyone in the PBISApps database. Searching with only a first name and last name will search for anyone in the selected organization.
4. The search results display below automatically.
5. Click the Select button next to the record matching your search criteria.
6. If the search returns no records, click the Add Person button.
7. Enter any missing required information.
8. Click the Create Person and Set Role button.

Send a School Invite

Districts invite schools to participate in DataLink by clicking the My Schools menu located at the top of the screen. Displayed in this workspace is a list of all schools in the district, regardless of their SWIS subscription status. If the list is long, use filters at the top to narrow the list based on SWIS subscription status, SWIS administrator information, whether DataLink Setup is toggled on or off, or whether an invitation has already been sent.

Invited schools accept an invitation by setting the uploaded data types to anything other than Send No Data. Their participation appears on the My Schools page under the school name where it says: Participation Level.

HERE'S A TIP

To send a school an invitation to participate in DataLink, the school must have

- An open SWIS subscription
- A school administrator listed with an email address.

If a school on this list is missing one or more of these requirements, contact the SWIS facilitator working in your district. The SWIS facilitator can add the administrator to the existing SWIS subscription or can help setup a SWIS subscription if the school doesn't currently have one. Click View Details next to any school to view the facilitator's information.

To invite a school to participate in DataLink, click the My Schools menu at the top of the screen:

1. Locate the school to invite and click the DataLink Setup Off button to toggle it to DataLink Setup On.
2. Click the View Details button listed for that school.
3. Click Send Invite.
4. Click Send to confirm sending the invitation. Click Cancel to return to the View Details page.
5. Participation Manager sends an email invitation to the School Administrator to participate in the DataLink integration.

View My Districts and My Schools Details

Included in the My Districts and My Schools menus is a page with additional information about the organizations listed.

To access this page:

1. Click My Districts or My Schools from the menus located at the top of the screen.
2. Locate the organization and click the View Details button next to it.

Within View School Details, District Authorizers can:

- Invite the school to participate in DataLink
- View the facilitator's information including first name, last name, and email address
- View a record of all DataLink history

Within View District Details, Uploaders can:

- Invite the district to participate in DataLink
- Add District Authorizers to the district on the list
- Review the number of schools supported by the district
- View a record of all DataLink history

HERE'S A TIP

Schools interested in reviewing a history of their DataLink activities have access to this information directly inside their SWIS accounts. To review the history:

1. Log in to your SWIS account.
2. Click your school's name in the upper right-hand corner.
3. Click View Import History in the middle of the DataLink Service menu.

API Management for Uploaders

Uploaders send data files using an API username and password. Once logged in to the DataLink Participation Manager, uploaders have access to their username and the ability to change their API password.

To change the API password:

1. Click the API Management menu located at the top of the screen.
2. Type a new password in the New Password field.
3. Re-type the new password in the Confirm Password field.
4. Click Change.

Notification Emails

As each organization selects how to participate in the DataLink process, communication between participants is important. The Participation Manager

takes care of some standard communications automatically. In addition to email notifications during the setup process, any time an organization changes the uploaded data types, participants receive an email keeping everyone in the loop about the change.

By default, everyone is opted in to receiving all notifications. To turn off the notifications:

1. Click the Notification Emails menu located at the top of the screen.
2. Uncheck the box next to any email to stop the notification.
3. Click Save.
4. To turn the notification back on, check the box next to the email and click Save to receive it, again.

HERE'S A TIP

If you are both the Uploader and the District Authorizer for your district, we recommend turning off the Uploaded Information Change notification, the District Participation Change notification, and one of the School Participation Change notifications. This keeps duplicate emails from loading up your inbox, as well as cutting out notifications of changes you, yourself, initiated.

DataLink Personal Account Settings

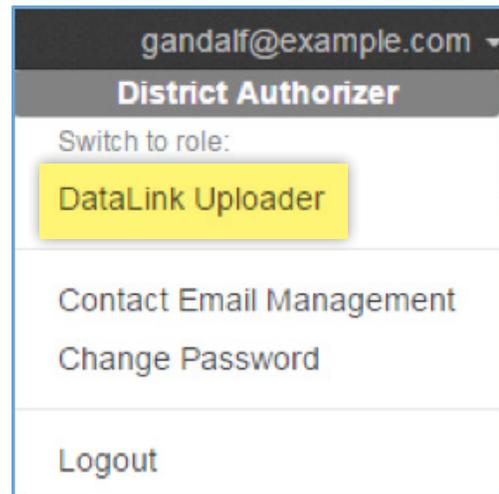
Some settings align with an individual user's account rather than the DataLink implementation for the organization. To access personal settings click the user's name displayed in the upper right-hand corner of the screen within the black app bar.

Switch Between DataLink Roles

Some users manage both the uploaded data files (uploader) as well as the district authorization and school invitations (district authorizer). For any user with multiple DataLink roles, it is possible to switch between these roles without managing two different logins. To switch between DataLink roles:

1. Click the user's name listed at the top right-hand corner of the screen to reveal a drop-down menu.
2. The currently selected role displays at the top of the menu.

3. Click the role listed under the title: Switch to Role to use the Participation Manager as that persona.



Set or Add a Primary Contact Email Address

Changes made by schools, districts, and uploaders trigger email notifications to anyone opted in to receiving those messages. These emails, and any other correspondence related to DataLink integration will be sent to an email address the user chooses.

To view contact email addresses:

1. Click the user's name listed at the top right-hand corner of the screen to reveal a drop-down menu.
2. Select Contact Email Management. Primary contact email addresses display here with a green check mark.

To add a new email address:

1. Click the green + Contact Email button.
2. Type a new email address in the Email Address field.
3. Re-type the same email address in the Confirm Email field.
4. Type the password affiliated with the login for this account in the Current Password field.
5. Click Save to save the new email address to the list of contact email addresses. Click Cancel to return to the Contact Email Management screen.

To set any address as primary: Click the Set as Primary Email button to the right of the address where all correspondence should be sent.

To edit any contact email address:

1. Click the Edit button to the right of the address to update.

2. Edit the current email address listed.
3. Type the password affiliated with the login for this account in the Current Password field.
4. Click Save to save the changes. Click Cancel to return to the Contact Email Management screen.

Change Password

A PBISApps password lets a user access every PBISApps application by logging in once. To change this password:

1. Click the user's name listed at the top right-hand corner of the screen to reveal a drop-down menu.
2. Select Change Password.
3. Type the current password in the Current Password field.
4. Type the new password in the New Password field.
5. Re-type the new password in the Verify New Password field.
6. Click the Save New Password button to save the new password.

SWIS Suite DataLink Features

Schools choosing to participate in DataLink use SWIS a little differently than standard SWIS schools. The biggest change: Depending on which data they choose to upload, schools no longer have access to certain workspaces in the SWIS Suite. Here is a little more information about DataLink features found in the SWIS Suite users expect to see.

Identify DataLink Schools in the School Select

Users with access to more than one SWIS school with at least one school choosing to upload data with DataLink see two additional functions to the School Select menu – the menu displayed when users first log in:

1. Check the box next to DataLink in the list of Search Filters to shorten the list to only schools participating in DataLink.
2. Click the Information icon next to a DataLink school and click the DataLink Information menu item. Information about which data the school uploads as well as an overview of the most recent data file uploaded is displayed.

DataLink Participation Notice in the SWIS Suite

All schools participating in DataLink see a persistent notification at the top of the SWIS account letting anyone logged in know data are linked between this account and the district information system. Additionally, if there are questions about what that means, there is a button the user can click to find out more information about the data integration process.

There are three possible participation notifications a school could see:

Opted In, Not Ready

Data uploads will start as soon as a school chooses to participate in the DataLink process and there are no data integrity errors preventing uploads. If a school selects its participation level and there are data integrity errors to correct in SWIS, the school will see this notification message:

Your school opted in to DataLink, but is not ready for uploads. There are data integrity errors preventing uploads from starting. Click the button to the right to fix them now.

Schools seeing this message will want to:

1. Click the Fix Now button.
2. Double-click any data integrity error listed in the DataLink Readiness section under Problematic Data to fix the error.

HERE'S A TIP

For more information about fixing Data Integrity Errors, see page 9.

Opted In, About to Start

Twenty-four hours from the time a school selects its participation level and there are no data integrity errors, a school's SWIS account locks down specific data entry workspaces and data upload with the next available file. Until then, the school can still manually enter data into its SWIS account. Users logged in to SWIS during this window between opting in and uploading data will see this notification message:

Your school uses DataLink! Data sent from your student information system will be available within 24 hours. Click the button to the right for more information.

Opted In, Uploading Data

Once data actively upload from the SIS to the school's SWIS account, specific data entry workspaces lock down in the SWIS Suite to prevent manual entry. For as long as the school opts to participate in DataLink, the school will see this notification:

Your school uses DataLink! Data sent from your student information system is now available in SWIS. Click the button to the right for more information.

DataLink Participation Overview

To view which data upload to your account automatically, click on the school name in the upper right-hand corner of the screen after logging in. The middle column displays information about the DataLink integration, including:

- **Member of District:** the school district where the school is located.
- **Uploader Name:** the name of the organization sending data to SWIS on the school's behalf.
- **Upload Settings:** the possible data types sent through DataLink and whether the school chose to send it or not.

Upload History

It is important to know when an upload happened and what was included in the file. Every DataLink participating school has access to the DataLink History page in its SWIS account. Included is a table with the last 30 days of DataLink uploads for the account and the following information about each upload:

- The date and time the uploads occurred
- The type of data included in the file (students, staff, referrals)
- The number of records processed from the file
- Whether those records uploaded successfully or not

To view the DataLink Upload History page:

1. Click Tools.
2. Click DataLink located under the Data header.

Note: This information is also accessible by clicking the school name in the upper right-hand corner of the screen and clicking View Import History from the DataLink Service menu.

Live Upload Status

Anyone logged in to a SWIS account during an active upload sees a notification as the upload is in progress. A yellow bar drops down at the top of the screen warning the users not to enter data while the upload occurs. When the upload is finished, the bar turns green indicating it is safe to resume regular activities in the account.

SWIS Data Entry with DataLink

Depending on the data a school chooses to upload, manual data entry in SWIS is minimal. All schools enter school days per month and enrollment data manually to their SWIS accounts.

Depending on the DataLink participation level, schools enter the following data manually:

- **Send No Data:** Schools enter all data manually in SWIS.
- **Only People:** Schools enter all referral data manually in SWIS.
- **People & Majors:** Schools enter all minor referral data manually in SWIS.
- **All:** Schools enter no data related to people or referrals manually in SWIS.

Data Integrity

Before uploading data, SWIS accounts must be clear of specific errors. These errors include:

- Missing Student/Staff Id Numbers
- Duplicate Student/Staff Id Numbers
- Student/Staff District Ids Not Required

If a school has data integrity errors to correct, users will see the Opted In, Not Ready notification at the top of the screen. Clicking Fix Now in that notifi-

cation takes users to the Data Integrity workspace. DataLink users find the errors they need to fix grouped together into a single table in Data Integrity.

Problematic Data

Double-click on each record to correct it

! DataLink Readiness (8)		
Category	Item ▲	Problem
Preferences	Require Staff District IDs	Staff District ID's not set...
Preferences	Require Student District IDs	Student District ID's not ...
Staff	Staff3 DataLinkDemo3	Duplicate District ID
Staff	Staff4 DataLinkDemo4	Duplicate District ID
Staff	Staff5 DataLinkDemo5	District ID Missing
Student	Student3 DataLinkDemo3	Duplicate District ID
Student	Student4 DataLinkDemo4	Duplicate District ID
Student	Student5 DataLinkDemo5	District ID Missing

To correct any of the records listed in Problematic Data under DataLink Readiness:

1. Double-click the record to correct
2. Correct the information.
3. Click Save.

HERE'S A TIP

If your building never required student and staff district ids to be entered, you might find there are many students and staff listed in your DataLink Readiness check. One way to shorten the list is to scan it for anyone no longer enrolled or employed in your building. Head to Person Management and archive any record for anyone no longer present at your school or facility.