

Self-Service Onboarding Checklist

This checklist was developed with feedback from the onboarding planning sessions for Early Adopters of the NCEdCloud IAM Service and is intended to assist districts in preparing for a rollout of NCEdCloud user accounts. LEAs and Charter Schools who wish to use the service should review the items below and complete (or plan for) all tasks prior to requesting the integration of Target Applications.

Readiness Section:

Completed	Task
	<p>Review NCEdCloud IAM Service Documentation and Resources Review presentations, videos, documentation on the IAM Service to make sure you have a clear understanding of what the service provides. These are available on the NCEdCloud IAM Service information website.</p>
	<p>Claim Account Process (for LEA Administrators) Before beginning the Checklist tasks you should have already claimed your NCEdCloud account and requested the LEA Administrator's role. This will be required to complete certain tasks below (and would normally protect access to this document).</p>
	<p>Identification of Key Personnel Key personnel (see descriptions at end of this document) in each LEA or Charter School need to be identified in order to set up delegated administrators and the appropriate request-approval workflows. Additionally, LEA and Charter School contacts need to be documented for the NCEdCloud Help Desk Service and Support Plan.</p> <ul style="list-style-type: none"> ■ Delegated Administrators (Minimum of 2) ■ Local (LEA/Charter School) Helpdesk Support (if different) ■ Training Staff (if different than above) ■ Approvers of IAM Service Workflow Requests
	<p>Source Data Integrity The NCEdCloud IAM Service uses student and employee identity data to determine appropriate access to Target Applications. If the source data (in PowerSchool or employee administrative systems) is not complete and accurate, or is not being provisioned to the NCEdCloud IAM Service, users may not be able to access their applications. It should be understood that as part of the onboarding process, LEAs and Charter Schools need to review the integrity of their user data in the IAM Service and in the respective source systems. Any discrepancies will need to be investigated and resolved - in particular specific attributes that impact functionality and access to resources.</p>

	<p>Release of User Data to Target Applications Once you have claimed your account and received the LEA Administrator role, you will be able to select which target applications you want integrated for your LEA or Charter School. Data required by the application, as stipulated in your contract with the vendor (or via a statewide agreement between the vendor and NCDPI) will be provisioned from the IAM Service to the application. Only the minimal set of attributes, needed for the application to function properly, will be released.</p> <p>This checklist item is for informational purposes only, so that you are aware that the IAM Service vendor will be releasing your data under contract with the state of North Carolina DPI and must follow all data privacy laws and regulatory guidelines (e.g. FERPA, COPPA, CIPA, etc.)</p>
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Local Processes:

The following items are suggested plans and processes you should discuss and have in place for a successful rollout of the NCEdCloud IAM Service. Even for integration with “required” DPI applications, your users will need to go through the Claim Account process and understand their self-service options and responsibilities. Planning for this rollout in advance can help alleviate frustration for your students and staff and reduce support calls for you.

	<p>Local Training Plan Describe your plan for delivering training on the NCEdCloud IAM Service to your LEA/Charter School end users, based on the resources provided (e.g. videos, online content, webinars, etc.)</p>
	<p>Local Support Plan Describe the local Support Plan for your LEA/Charter School and how issues will be escalated to the NCEdCloud Help Desk</p>
	<p>Claim Account Process for Users Except for primary students (K-5), users will need to “claim” their accounts online. This includes setting up challenge-response security questions to enable self-service password resets, and establishing their initial password</p>
	<p>User Acceptance Testing Verification of IAM Service functionality by an LEA or Charter School to complete the rollout process</p>

Descriptions of Key Personnel (Roles):

Delegated Administrators:

- LEA/Charter School Technology Leader (Tech Director, CTO, IT Manager, etc.) and a limited number of support staff
- Can reset passwords, enable and disable accounts
- Requests Target Applications for their LEA/Charter School
- Escalates support calls to the NCEdCloud Help Desk
- Approves workflow requests for granting LEA employee privileges (e.g. LEA Administrator, Data Auditor, Help Desk)
- Can also create Sponsored Guests

Local Helpdesk Support (LEA/Charter School):

- Can reset passwords for user accounts
- Can view employee and student profiles
- May be able to escalate help desk calls to the NCEdCloud Help Desk

Training Staff (if different personnel than above):

- Normally delivers training to LEA/Charter School Users (students and staff)
- Familiar with NCEdCloud IAM Service and training videos (answers questions)
- May develop or adapt local documentation or *Quick Start* guides for local users
- “Go to” person in district for general information on the IAM Service

Approvers (High-Level Administrator other than Tech Director – if needed)

- Person(s) with the authority to make the following decisions for the LEA/Charter School
 - Selection of new Target Systems (contracts/licenses must be in place)
 - Identification of personnel authorized to receive LEA Administrator Role

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