TRAINING GUIDE

Welcome | Login

Registry User Role Definitions

Depending on the 'Role' which has been assigned to you on the SDPC Resource Registry, then you have the following functionality available to you:

- Alliance Main Admin (Premium)
- Alliance Main Admin (Basic)
- District Main (Premium, Manages One District)
- District Main (Basic, Manages One District)
- District Main (Manage Multiple Districts)
- District (Additional Users)
- View Rights Only (Teachers)
- Exhibit E Signer
- Non-Profits & Partner Members
- Vendor (Premium)
- Vendor (Basic)

Alliance Main Admin (Premium)

Permissions overview:	Full use of site, can manage all users and districts in their alliance, API access
Functionality overview:	Manage Districts, Manage Alliance Users, Manage Agreement Templates, Add/Edit District Agreements, Auto Exhibit E Creator, Access Searches, Access to request a Resource to be added, approve/reject pending accounts, bulk email tool, data breach notification, Use API
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for all districts in the alliance to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) New Account Requests, Agreement Holding notices
Export field code:	2

Alliance Main Admin (Basic)

Permissions overview:	Full use of site, can manage all users and districts in their alliance
Functionality overview:	Manage Districts, Manage Alliance Users, Manage Agreement Templates, Add/Edit District Agreements, Auto Exhibit E Creator, Access Searches, Access to request a Resource to be added, approve/reject pending accounts, bulk email tool, data breach notification
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for all districts in the alliance to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) New Account Requests, Agreement Holding notices
Export field code:	13

! Some Alliances have the following '***Special Provisions***' functionality in addition to the above:

- Restrict access to Exhibit E's (to members/non-members outside of their Alliance participants) from the Registry,
- Control whether the Originating/Subscribing Exhibit E's are publicly displayed for specific Districts,
- Additional controls for Progress Workflow Status/Email Messages for New Requests

District Main (Premium, Manages One District)

Permissions overview:	Full use of site and API
Functionality overview:	Access searches, API, Manage/Add/Edit District Agreements, Auto Exhibit E Creator, Access to request a Resource to be added, edit district account info, manage district users, manage progress workflows, customized resource listing, digital resource request form, view/subscribe statewide new requests, view expiring agreements, bulk email tool
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their district to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) Flagged DPA Entry Submissions, Expiring Agreement (Renewal Enhancement Must Be Enabled), Subscribe to New Request Progress, Data Breach, New Request Entries, Progress Workflow Notifications, Resource Request Form Results
Export field code:	4

District Main (Basic, Manages One District)

Permissions overview:	Full use of site
Functionality overview:	Access searches, Manage/Add/Edit District Agreements, Auto Exhibit E Creator, Access to request a Resource to be added, edit district account info, manage district users, manage progress workflows, customized resource listing, digital resource request form, view/subscribe statewide new requests, view expiring agreements, bulk email tool
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their district to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) Flagged DPA Entry Submissions, Expiring Agreement (Renewal Enhancement Must Be Enabled), Subscribe to New Request Progress, Data Breach, New Request Entries, Progress Workflow Notifications, Resource Request Form Results
Export field code:	14

! There should only be ONE District Main account holder per school district. All others users should be assigned as 'District (Additional Users)'.

District Main (Manage Multiple Districts)

Permissions overview:	Full use of the site. Can manage all associated district's data.
Functionality overview:	Manage/Add/Edit Agreements for multiple districts, can access searches, can manage progress workflows, Auto Exhibit E Creator, Access to request a Resource to be added
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their district to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) Flagged DPA Entry Submissions, Expiring Agreement (Renewal Enhancement Must Be Enabled), Subscribe to New Request Progress, Data Breach, New Request Entries, Progress Workflow Notifications, Resource Request Form Results
Export field code:	7

District (Additional Users)

Permissions overview:	Same as district admins but, their names don't show as electronic signatures on documents
Functionality overview:	Can access searches, Manage/Add/Edit District Agreements, Access to request a Resource to be added, Auto Exhibit E Creator, edit district account info, manage district users, manage progress workflows, customized resource listing, digital resource request form, view/subscribe statewide new requests, view expiring agreements
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their district to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	None
Export field code:	5

View Rights Only (Teachers)

Permissions overview:	View only permissions.
Functionality overview:	Can access searches, view the Agreements for the district
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for all districts to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, meta data (grade, content area), status
Registry Notifications:	None
Export field code:	8

Exhibit E Signer

Permissions overview:	To review prepared DPAs and Exhibit E's
Functionality overview:	Can access searches, approve prepared Exhibit Es, view District Agreements, Access to request a Resource to be added
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for all districts in the alliance to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, requestor, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs
Registry Notifications:	(By email) Prepared Exhibit E's ready to sign
Export field code:	10

! On the 'Edit District Account Information' page, under the Customizations heading, you must ensure that the following option is checked:

> *Will you have an alternative staff member, such as the Superintendent, sign Exhibit Es?*

If this box is checked, there should only be ONE Exhibit E Signer account holder per school district.

Non-Profits & Partner Members

Functionality overview:	Access Searches only
Data available: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for all districts to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, meta data (grade, content area), status
Registry Notifications:	None
Export field code:	12

Vendor (Premium)

Permissions overview:	Full use of site, badges, and API
Functionality overview:	View agreements with districts, access searches, manage badges, use API, data breach notification, 'Feature' Agreements on State Alliance pages
View rights to the data: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their resources to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs, no access to protected Alliance 'Special Provisions' Exhibit Es.
Registry Notifications:	New Exhibit Es
Export field code:	3

Vendor (Basic)

Permissions overview:	Full use of the site, except for API
Functionality overview:	View agreements with districts, access searches, data breach notification, 'Feature' Agreements on State Alliance pages
View rights to the data: *(all data fields in data, software, agreement_types, districts, companies' tables)*	View DPA data for their resources to include agreement types, resource/company data, start/end DPA dates, data elements, agreement restrictions, pdf of full DPA, exhibit Es, custom exhibit A/Bs, meta data (grade, content area), status. Users can also view these data fields for other districts and alliances in searches: DPA data, PDFs, no access to protected Alliance 'Special Provisions' Exhibit Es.
Registry Notifications:	New Exhibit Es
Export field code:	11