What is School Data Sync

Preparations for new year:

Having received class lists, leavers and new member information from a school, go to Sharepoint Site Documents>SDS>SchoolName

Select school and Download entire zipped file & extract

Name	Date modified	Type	Size
Creators.csv	30/07/2020 11:30	Microsoft Excel Com...	1 KB
School.csv	30/07/2020 11:30	Microsoft Excel Com...	1 KB
Section.csv	30/07/2020 11:30	Microsoft Excel Com...	1 KB
Student.csv	30/07/2020 11:30	Microsoft Excel Com...	10 KB
Studentenrollment.csv	30/07/2020 11:30	Microsoft Excel Com...	3 KB
Teacher.csv	30/07/2020 11:30	Microsoft Excel Com...	2 KB
TeacherRoster.csv	30/07/2020 11:31	Microsoft Excel Com...	1 KB

Creators

School

These two csvs can be ignored for subsequent imports but **School** must be included for initial profile set up for a new SDS profile/academic year.

NB

Creator = Staff identified to manually create Teams

School = School name and DfE Number for an individual school or declares all schools for a MAT

Section = Class name & ID

Student = Pupil names, UPNs, username, password & ID.

Check for

- intake years against SIMS and new/pre- admissions/leavers from schools (Class lists will include birth dates or App support can pull a report from hosted SIMS)

- special characters, hyphens, gaps in usernames/email addresses

- duplicates

Studentenrolment = class memberships based on IDs

Teacher = teacher names, UPNs, username & ID

TeacherRoster = class memberships based on IDs

1. Update each of the 5 Spreadsheets: Student, StudentEnrollment, Teacher, TeacherRoster, Section

- Remove leavers

- If new users are not yet in SIMS, create a unique temp ID: LetterI:DFE#:number continued from last list ie I873333118019
  - Create usernames to match schools preferred format
  - Use the random password generator for primary suitable passwords

- Note the school's preferred Class names for the next academic year and create new unique class IDs in the Section csv, incremental from previous, removing previous.

- Match Student and Teacher IDs from csvs to StudentEnrolment and TeacherRoster, ensuring that all Teachers that require access to each classes are included. **Syncs will remove any manually added memberships**

1. Create a new folder for this academic year in Sharepoint Site Documents>SDS>SchoolName and upload your completed documents for future reference/updates.

2. In admin console

- Create any new users from import user template
  - For pupils: set for passwords to not expire & no email
  - Run Powershell to reset passwords, updating a copy of the password reset template file
  - Add new users to the licences group (Azure AD) from import template

3. Select all admin centres>school data sync.

- Note summary of sync status

- Note the set date that each class will auto archive [schools to be aware of/confirm the archive date = when pupil access will be removed.
  - Staff will access under archived Teams

4. Select Add Profile:
  - Name = SchoolName AcademicYear ie Petersfield 20-21
  - Select CSV Files: SDS format
  - Select Start
  - Disable
    - Guardian Sync
    - Delay Student Access unless school have opted not to have a delay
  - Upload all 5 of your updated csv files.
    - If any errors are noted, correct files and **be sure to update in the sharepoint folder***
  - Next > Create Profile
  - This can take some time to refresh window every few minutes to check on progress.
  - On completion, check in Groups that the Teams have been created, not just the Group = Teams icon.

Edits during an academic year:

- New user
  - Repeat as above
    - Create new accounts
    - License through Azure AD license group
    - Update SDS spreadsheets
    - Edit profiles importing updated csvs
    - Ensure updated csvs are saved to the sharepoint site*

- Leavers
  - Edit profiles importing updated csvs
  - Ensure updated csvs are saved to the sharepoint site*
    - Note that this does not deactivate leavers therefore:

- Deactivate accounts
- If school have A3 licenses, remove from Azure AD license group and assign A1 license for data retention through a leavers license group.
- If a staff leavers license group doesn't exist, create new, assigning A1 licenses with matching apps or at least exchange.