THE SEDDAS USER GUIDE

Complete Instructions on using the SEDDAS Application in the New York State Education Application Business Portal
THE SEDDAS USER GUIDE

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Section 1: Overview

The following is a brief description of the functions in SEDDAS and suggestions for how to get started.

Main functions of SEDDAS

- Account Administration
  - Create, update, disable and re-activate authorized users within schools, districts, BOCES, Regional Information Centers (RICs) and other NYSED Institutions and to manage user ID’s and passwords.
- Entitlement Administration
  - Grant access to protected web applications found on SED web portal to specified school administrators.
    - Example: School Business Administrator needs access to SAMS.

SEDDAS Account Administration: The functions that a SEDDAS user can perform is determined by their Role. The Roles available for an institution are determined by the institution type (public school, public school district, nonpublic school, charter, etc.).

SEDDAS Roles are as follows:

- **Super Delegated Administrator – Super DA (System Generated)**
  - Is Available for **public school districts only**, and must be the school superintendent who is the CEO. School buildings and other institutions do not have a Super DA.
  - The Super DA SEDDAS account is automatically created based on the CEO of record in SEDREF via an overnight process.
  - Changes to CEO in SEDREF will close the SEDDAS account for the former CEO and create a SEDDAS account for the new CEO with all the entitlements of the former CEO.
  - Can create other roles to assist in the administration of SEDDAS (DA, EA and DA/EA) at both the building and district level.
  - Can perform all the functions within SEDDAS as allowed for the institution.
  - Is the only role able to Submit and Certify for the district.

- **CEO Delegated Account/Entitlement Administrator – CEO DA/EA (System Generated)**
  - Available for CEO’s of nonpublic schools, charter schools and public school buildings (principals).
  - Is automatically created based on the CEO that has been recorded in SEDREF via an overnight process.
  - Changes to CEO in SEDREF will close the SEDDAS account for the former CEO and create a SEDDAS account for the new CEO with all the entitlements of the former CEO.
  - Can perform the functions within SEDDAS as allowed for the institution.
- Is the only role able to Submit and Certify for public school buildings (principals), nonpublic schools and charter schools.
- Can create other roles to assist in the administration of SEDDAS as allowed for the institution.

**Delegated Administrator – DA**

- Can perform the function of account administration.
- Can create, update, disable and re-activate user accounts.
- Can create an account for Entitlement Administrator(s) (EA) who will grant access to applications.
- Cannot Entitle access to applications.
- In public school districts, this role can and must be designated to school CEO’s by the superintendent (Super DA).
- Can be designated by either the Super DA or CEO DA/EA or designee of the principal/superintendent (DA or DA/EA).

**Entitlement Administrator – EA**

- Perform the function of Entitlement Administration.
- Entitle access to applications to school staff as assigned by CEO.
- Has no authority over account administration (cannot create User ID/password).
- Can be designated by the either the Super DA or CEO DA/EA or designee of the principal/superintendent (DA/EA).

**Delegated Account/Entitlement Administrator – DA/EA**

- Is created by the CEO.
- A combined DA/EA role which allows one person to perform duties of both DA and EA.

**The Superintendent/CEO must determine:**

“Will I alone manage the Business Portal accounts and have sole access to the SED applications?” NOTE: If the Superintendent (Super DA) chooses not to assign the functions to other staff, the superintendent must perform all the functions in SEDDAS.

OR

“Will I assign the responsibilities of DA and EA to one or more district staff?” CEO accounts or individual accounts do not belong to the school generically, accounts should be used only by the person who the account was created for.

NOTE: When there is a change in a CEO for any SED Institution, the NYSED's Office of Information and Reporting Services must be formally notified so the SED Reference File (SEDREF) can be updated. An email must be sent to datasupport@nysed.gov.
Section 2: Search for User

Purpose
It is necessary to search for a person’s User ID and other related information to determine if the person is or may have been a past user of the NYSED Portal. **Note: your search is limited to your jurisdiction.**

Who can perform this function?
This function can be performed by the Super Delegated Administrator (Super DA), the Delegated Administrator (DA), and the Entitlement Administrator (EA) using the SEDDAS application.

Step # 1
The Super DA/DA/EA should log in to portal.nysed.gov, and then select the State Education Department Delegated Account System (SEDDAS).

Step # 2
Click **Search User** menu choice found on the left side of the web page.
Step # 3

Enter either the User ID (or a minimum of the first 3 letters of the User ID with a * wildcard character) or enter the Last Name (or a minimum of the first 3 letters of the last name).

You can select from:
- All Accounts
- Enabled Accounts
- Disabled Accounts
- Locked Accounts

All matching User Names or ID’s in your jurisdiction will be displayed with a radio button column along the left side that will allow you to select the correct user. NOTE: If the user already has an ID but the user is not within your jurisdiction, you may not be able to see that User ID. (If the user has no existing ID in your jurisdiction stop here and go to Create User ID.)

Step # 4

Click View Selected.
Step # 5
If the account is Enabled (indicated in User ID field), review the information for completeness and accuracy.

a) To change entitlements click Entitle Applications or Entitle Administrator and go to: Section 10: Entitlements-Overview.

b) To update information such as a Position/Title, Work Phone or Email as needed, click Update and go to Section 6: Update User.

c) To create a SEDDAS Delegated/Entitlement Administrator click Entitle Administrator and go to Section 11: Creating a Delegated/Entitlement Administrator, Delegated Administrator, or Entitlement Administrator.

Step # 6

a) If the account is Disabled and if the Institution is in your district click Reactivate.

b) Another screen opens. Then click Reactivate User Account.
c) You will now see that the account has been activated.

User account for Sally Noname has been activated
This user will need to be reentitled to access the NYSED protected applications

User Information

Name: Sally Noname
User ID: sally.noname (Enabled)
Position/Title: ADMINISTRATIVE ASSISTANT
Institution: COHOES CITY SD
Location: Cohoes City SD
Phone: (555) 555-5555 Ext:
Email: snoname@xxxx.k12.ny.us

NOTE:
- An email message concerning this update was sent to both you and this user
- If the email address for this user is incorrect, please notify this user of the update

d) You are now ready to grant Entitlements; go to Section 10. Entitlements Overview.

Section 3: Create User ID

Purpose
If your search has confirmed that a user does not already have an available User ID, an account must be created to permit a person to log in to the NYSED Business Portal. After an account and User ID is created for a user, entitlements must be granted to the user. The User ID in combination with the entitlements allows appropriate access to protected application systems via the NYSED Business Portal.

Who can perform this function?
This function can be performed by the Super Delegated Administrator (Super DA), the Delegated Administrator (DA) or the Delegated/Entitlement Administrator.

Possible Scenarios
a) The user already exists in SEDDAS, is in your district and you want to reassign their User ID to another Institution in your district go to Section 4: Reassign User.

b) The user already exists in SEDDAS, and is in your district and you want them assigned to an additional Institution in your district, which would have a different BEDS Code (e.g. one User ID at the building level and one at the district level).

c) The user already exists in the system, and is in a completely different district that you have no jurisdiction over.

d) The user does not exist in the system at all.

For scenarios b, c and d follow the directions to Create User a ID outlined below.
Create User ID

The Super DA or the DA/EA should go to portal.nysed.gov, log in and then select the State Education Department Delegated Account System (SEDDAS).

Step #1

a) Click **Create User** menu choice found on the left side of the web page.

b) Enter the first name, last name and Email of the new user you want to create.

c) Click the **search icon** in the institution field.

d) The Search Institution Screen is returned. Enter one of several different search criteria and then click **Search**.
e) A list of Institutions will display, click the button of the Institution you want to choose.

f) The Create User screen returns with the Institution name filled in, click Next.
Step # 2 Evaluate the Situation.

a) If the user exists in the system continue to Step # 3

User Information in our System

Raen Gardner already exists in our system ...

Note: Vendor accounts are not displayed

<table>
<thead>
<tr>
<th>User ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Institution</th>
<th>Work Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>raen.gardner</td>
<td>Raen</td>
<td>Gardner</td>
<td>COHOES CITY SD</td>
<td>(518) 555-5555 Ext: rgardner</td>
</tr>
</tbody>
</table>

b) If the User ID does not exist in the system you will see a screen similar to the one shown below.

Select the user Position/Title by using the drop-down arrow and click on the appropriate role.

1) Enter a phone number.
2) Select one of the forms of ID available to confirm identity, click Create.
3) A new screen will appear prompting you to grant entitlement, click Continue.
The View User screen will now open and it will say:

**User does not have access to any applications.**

4) You are now ready to grant Entitlements; go to [Section 10. Entitlements Overview](#).

**Step # 3 User Exists in the System, Reevaluate the situation**

The DA creating the account must determine the situation. There are two possible paths to follow:

a) Reassign the Institution.

b) Create a New User.

c) If the DA determines this is a DIFFERENT “Raen Gardner”, and that a new User ID should be created then the DA should click **Create User**.

d) Go to **Step # 4 Create User below**.

e) If the DA determines this is the SAME “Raen Gardner”, but in a different jurisdiction, Go to **Step # 4 Create User** *(Any account, not in your jurisdiction, will have a grayed-out radio button)*.
f) If the DA determines this is the SAME “Raen Gardner” and in your jurisdiction, you can opt to reassign the user to another institution in your jurisdiction however they will no longer have access to that institution, a user must have one User ID for each institution (BEDS code) in your district that they operate under. To choose this option select the button on the left of the user name and then click Reassign Institution. Go to Section: 4 Reassign Institution

Step # 4 Create User

a) Select the user Position/Title by using the drop-down arrow and click on the appropriate role.
b) Enter the Work Phone.
c) Select one of the forms of ID available to confirm identity.
d) Click Create.

e) A new screen will appear prompting you to grant entitlements.
f) Click Continue.
g) The View User screen will now open and it will say:

User does not have access to any applications.

You are now ready to grant Entitlements, go to Section 10 for Entitlements Overview.

Section 4: Reassign Institution

Purpose

The Reassign Institution function should be used to change the institution that corresponds with an existing User ID if the user is no longer at that institution and if the User ID is inactive. If the institution where the active User ID currently exists is not part of your jurisdiction, you cannot use the Reassign Institution function.

Who can perform this function?

This function can be performed by the Super Delegated Administrator (Super DA), the Delegated/ Entitlement Administrator (DA/EA) and the Delegated Administrator (DA).

How to determine if an existing User ID within SEDDAS can be reassigned?
Use the Search function described in Section 2 of the User Guide to determine the status of the person’s User ID (you may prefer to use the Advanced Search function in Section 5).

a) The Super DA or the DA/EA should go to portal.nysed.gov, log in and then select the State Education Department Delegated Account System (SEDDAS).
b) Click Search User menu choice found on the left side of the page.
c) Enter either the User ID (or a minimum of the first 3 letters of the User ID) or enter the Last Name (or a minimum of the first 3 letters of the last name).
d) All matching User Names or ID’s will be displayed, if the user is in your jurisdiction you will be able to select it, then click View Selected.

e) The View User window will open click the Reassign Button

f) Complete the Institution field by clicking on the magnifying glass search icon. The Institution Search window will open.

g) To search enter the school’s Popular Name, institution ID or BEDS Code.

h) Click Search.

i) Click the button next to the name of the Institution you want to reassign the user to and click Search. The information will auto populate into the next screen.

j) Enter the users current work phone, email, position/title and then click Next.
Reassignment Information

- * indicates required
- To select the reassigned institution for this user, click the icon

Institution *

COHOES HIGH SCHOOL

Work Phone *
518-555-5555 Ext:

Email *
rgardner@xxxx.k12.ny.us

Position/Title *
PRINCIPAL

k) Review your entries and then click Update to finalize.
l) You will receive a message that the user Information/Institution has been updated/reassigned successfully.

The account will need to be re-entitled to access the NYSED protected applications.

Go to Section 10 for Entitlements Overview.

Section 5: Advanced Search

- The Advanced Search function allows a search based on more fields than available in the Search User function.
- It also provides a way to quickly list all the users in your jurisdiction by using the List All Users sub-function.
- The Advanced Search can also be used to find the DA for an individual or for a specific institution by selecting Admin(s) for Building. Finding the DA facilitates directly requesting disabling the account for reassignment purposes, or for other reasons.

Step #1

Click Advanced Search on the menu choice found on the left side of the page.

There are 3 types of searches:
- Advanced
- Admin(s) for Building
- List all Users
Step # 2 Advanced Search
Enter your search criteria into one or more of the following:

a) Enter additional search criteria to limit the number of matches.
b) A minimum of 3 characters, may be used in any field except for **Institution ID / BEDS Code**.
c) The **Institution ID / BEDS Code** field must be exactly 12 digits or 5 digits.

d) Click **View Selected**.
e) From there you can launch any one of 8 choices in SEDDAS by clicking one of the coinciding buttons in the User Information field.

(Note you can only reassign a user name that is in your district)
Step #3 Admin(s) for Building Search

a) Click Advanced Search, and the Find SEDDAS Administrators for an Institution screen is returned. Click the icon to select an institution.

b) The Search Institution Screen is returned. Enter one of several different search criteria and then click Search.

c) A list of Institutions will display, click the button of the Institution you want to choose.
d) Click Next. A list of the Administrators for that BEDS Code will be returned.

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**Step # 4 List of all Users**

a) Click Advanced Search and List All Users.
b) Select your district from the drop down next to District
c) A list of all users in all institutions in your jurisdiction district will be returned.
d) Title of CEO for an institution will be bold with TITLE (CEO)
e) Click Update User List to refresh the screen from prior searches
Section 6: Update User

Purpose
It may become necessary to update user information because of changes to phone numbers, email address, or position/title.

Who can perform this function?

This function can be performed by the Super Delegated Administrator (Super DA), the Delegated/Entitlement Administrator (DA/EA) and the Delegated Administrator (DA).
- Click Search User menu choice found on the left side of the web page.
  - Enter either the User ID (or first 3 letters of the User ID followed by a wildcard (*) character) or enter the Last Name (or first 3 letters of the last name followed by a wildcard (*) character).
b) All matching User Names or ID’s will be displayed.
c) Select the user whose ID you need to update.
d) Click View Selected.

e) Click Update
f) Make the changes to the Work Phone, Positions/Title or Email as needed
g) Click Save
h) An email message concerning this update will be sent to both you and the user

Section 7: Disable User ID

a) Follow the instructions to search for a user in Section 6 above
b) Select Disable.

c) Select a Reason for Disabling and then click Disable User Account.
g) The user account will be disabled and an email sent to both you and the user.
Section 8: Reactivate User ID

a) Follow the instructions to search for a user in Section 6 above, make sure All Accounts is checked.
b) Select the account you want to reactivate and then click View Selected.

c) Click Reactivate, the Reactivate User window will open.
d) Click Reactivate User Account

e) User account will be activated and the user will need to be granted entitlements to the NYSED protected applications.
   Go to Section 10 for Entitlements Overview.

Section 9: Reset Password/Unlock Account

To unlock an account use password reset Option #2 as described below.

There are two ways to reset your password:
Option #1. Change Your Password While You Are Logged In.
Option #2. Change Your Password While You Are Not Logged In (Unlock Account Process).
Option #1 Change Your Password While You Are Logged In

a) From the Business Portal Home page while logged in click Change your password?

b) Enter your Current Password.

c) Enter a New Password following the password requirements.

d) Confirm Password by entering your new password again.

e) Click Submit.

f) To stop and go back click Cancel.
After clicking Submit, a window will open with confirmation your password has been changed.

Option #2 Change Your Password When You Are Not Logged In (Also can be used to Unlock an Account).

a) Navigate to portal.nysed.gov.
b) Click Reset Password.
c) A new window will open, enter your Username and Email
d) Click the “I’m not a robot” box. A green check box will be returned or you will be asked for more information
e) Click Submit
f) You will be notified that “A confirmation email has been sent to: “Your Email Address”

![Application Business Portal Password Reset](image)

**Application Business Portal Password Reset**

<table>
<thead>
<tr>
<th>Changing password for: chris.cross</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Password</td>
</tr>
<tr>
<td>Confirm Password</td>
</tr>
<tr>
<td>[Cancel] [Submit]</td>
</tr>
</tbody>
</table>

**Password Requirements**

- At least 6 characters
- At least 1 lower case letter
- At least 1 upper case letter
- At least 1 number
- At most 3 repeating characters
- New and Confirm must match

![Application Business Portal Password Reset](image)

h) Enter a New Password following the password requirements.

i) Confirm Password by entering your new password again.

j) Click Submit.

k) To stop and go back click Cancel.

l) You will see a confirmation that your password has been successfully changed and to click the link to return to the NYSED Portal.
Section 10: Entitlements-Overview

Purpose

Entitlements consist of two sub-functions the purpose of this section is to explain the differences between the two sub-functions.

Entitle - allows those in the role of “Entitlement Administrator only”, as well as Super DA’s and DA/EA’s, to grant specific Users access to specific applications. This allows a user to access the specific protected NYSED applications associated with the User ID. A User ID might have access to the “Examination Request System”; a different User ID might have access to the “Institution Master File”. Go to Section12: Creating Entitlements to Applications

Entitle SEDDAS - This allows the Super Delegated Administrator (Super DA) to grant select users the ability to create Delegated/ Entitlement Administrator.

(DA/EA) and Entitlement Administrators who can then assist with creating users, granting entitlements and providing support to users. It is primarily an administrative function to allow for delegation of responsibilities. To entitle to SEDDAS go to Section 11: Creating an Delegated/Entitlement Administrator, or Entitlement Administrator.

Section 11: Creating a Delegated/Entitlement Administrator, Delegated Administrator, or Entitlement Administrator

Purpose

The Entitle-Delegated Account System is a sub-function of the Entitlements Function. It allows a SEDDAS Administrator to create additional administrators.

Who can perform this function?

There are three choices of “role” when entitling an Administrator. The role selected, determines who can perform this function.

• The Super Delegated Administrator (Super DA) can entitle all roles within the Entitle-Delegated Account System (SEDDAS), as long as the user is within the jurisdiction of the Super DA.
• The Delegated/ Entitlement Administrator can entitle only an Entitlement Administrator as long as the user is within the jurisdiction of the Delegated/ Entitlement Administrator.
Step # 1
a) The Super DA or Delegated/Entitlement Administrator should go to portal.nysed.gov, log in and then select the State Education Department Delegated Account System (SEDDAS).
b) Only Super DA's can grant the “Delegated Administrator Only” and “Delegated / Entitlement Administrator” roles.
c) Click Search User menu choice found on the left side of the web page to locate the User.
d) Select the User from the User List and click View Selected.
e) Click Entitle Administrator.

![View User](image)

f) Select the role for the User.

g) Select the Applications for which this User May Be an Administrator.
h) An email will be sent to both you and the user verifying the entitlements.
Section 12: Creating Entitlements to Applications

a) Click **Entitle Applications**.

b) Under Select Applications for Entitlement; check the boxes next to each application you wish to entitle the user to.

c) Click **Next**.

d) For each application displayed assign roles as needed, make your selections of applications to entitle and then click **Next**.

e) Review your selections and then click **Grant Access**.

f) An email message will be sent to both you and the user.
Section 13: Reports

Please be advised that the reports in SEDDAS will be refreshed daily. Based on the volume of SEDDAS changes from the previous day, the refreshed reports could be available as early as 10 am the next morning or as late as 5 pm the next afternoon. You can download a report as a PDF or as an Excel Spreadsheet.

Step 1: After logging into SEDDAS

a) From the menu on the left click Reports.
b) From the District dropdown choose the school district.
c) To download a PDF click Get Report.
d) To download an Excel spreadsheet click Get Workbook.

Step 2: View or Download

a) Open the downloaded file to view the report
b) To save the PDF click File and then click Save As and choose your File Name and location.
c) To save the Excel Spreadsheet click on the downloaded file to open the Excel Spreadsheet and then click Save As and choose your File Name and location.