

**Instructions for the Set-Up of Business BCeID  
for SADE**

The following instructions should be followed to set up your district and your necessary staff with Business BCeIDs, to enable them to submit and release SADE data. This initial set up process should be completed in November, 2008, to ensure staff are ready to access the system for testing their extracts in November/December, and for the first official submission in January 2009.

Once this set up is complete, further instructions will follow to give identified staff access to the SADE system and DX<sup>2</sup>.

**Definition of Roles**

<b>BCeID Roles</b>	
<b>Roles in BCeID</b>	<b>Brief Description</b>
Business BCeID	An ID that is unique to one individual. This ID should be set up using the guidelines provided below to ensure the correct BCeID user type is created within the school district.
Business Profile Manager (BPM)	Secretary Treasurer or delegate recommended. This BCeID role manages and can change many aspects of the district's BCeID profile. They can create other BPMs, BAMs and Users; change existing accounts (add, delete, disable, re-enable), reset passwords, etc.
Business Account Manager (BAM)	This role has many of the same privileges as the Business Profile Manager. They can create other BAMs and Users, change existing accounts (add, delete, disable, re-enable), reset passwords, etc. However, this role cannot delete or change the district's BCeID profile. Typically, this role is given to someone in authority who knows the staff that will be directly involved in the particular data collection. In the case of SADE, this role may be assigned to staff at a school to manage the accounts for that school.
Business User	This role can only manage their own account (change their contact information, change their password and password hints, however, they cannot reset their own password if they have forgotten it).

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<b>SADE Roles</b>	
<b>Roles in SADE</b>	<b>Brief Description</b>
SADE SD Administrator	The primary contact for matching up individual Business BCeID in the district and schools to the tasks they have the authorization to perform. This person should be familiar with the staff and their responsibilities, and should be the point person to contact for staff turnover or if replacement staff need access to the system. This role will be filled by someone who has a BCeID role of BPM or BAM.
Submitter	The person(s) responsible for submitting the School's student achievement data to the Ministry via the DX <sup>2</sup> and SADE system. This person will also have access to the error reports, and, if errors occur, should be able to make corrections to their data and resubmit. This role will be filled by someone who has a BCeID role of Business User.
Releaser	The Superintendent or delegate at the school district, or principal or delegate at an independent school. This role should have the knowledge and authority to release the school's error-free data to the Ministry. This role will be filled by someone who has a BCeID role of Business User.

## Set Up Instructions for BCeIDs

Setup of BCeIDs for SADE	
Step	Instructions
<p><b>Step 1:</b> Does your school / district already have a Business BCeID?</p>	<p>Go to the BCeID website: (<a href="http://www.bceid.ca/">www.bceid.ca/</a>)</p> <ul style="list-style-type: none"> <li>○ Under “Discover” (right hand side of screen), click on the link <a href="#">Is my Business already registered?</a></li> <li>○ The BCeID Online Business Directory is displayed - click on the “Search” tab</li> <li>○ Under “Legal Name” type in: <i>School District</i></li> <li>○ Under <a href="#">Match Search Criteria Using</a> (right hand side) select the button beside <a href="#">Contains</a></li> <li>○ Press the <a href="#">Search</a> button</li> <li>○ Click the link associated with the School District you wish to view</li> <li>○ Security Control screen is displayed - enter the characters shown in the image, press <a href="#">Next</a></li> <li>○ The BCeID Business Details for your School District are displayed - names of the Business Profile Manager (BPM) and/or Business Account Managers (BAM), email address, and phone numbers (optional)</li> <li>○ To have additional BCeIDs created, you will need to contact your BPM.</li> </ul>
<p><b>Step 2:</b> Assign the roles of Business Profile Manager to the Secretary Treasurer and an alternate.</p>	<ul style="list-style-type: none"> <li>● If the Secretary Treasurer or delegate is already the BPM, then proceed to Step 3</li> <li>● If the Secretary Treasurer or delegate does not have a BCeID, have the existing BPM create a BCeID for them with the role of BPM. <ul style="list-style-type: none"> <li>○ Login to the BCeID Website (<a href="http://www.bceid.ca/">www.bceid.ca/</a>)</li> <li>○ Select ‘<a href="#">Account Management</a>’ under ‘<a href="#">My Business BCeID Account</a>’ on the menu on the left.</li> <li>○ Select ‘<a href="#">Manage Business BCeID Accounts</a>’ under ‘<a href="#">Manage My Business</a>’.</li> <li>○ Click ‘<a href="#">Add New Account</a>’</li> <li>○ On the ‘<a href="#">Create a New Business BCeID Account</a>’ screen, there are three sections to complete. In the <a href="#">BCeID Authorizations</a> section, set the radio-button to ‘<a href="#">Business Profile Manager</a>’</li> <li>○ Click <a href="#">Next</a> to continue</li> <li>○ On the ‘<a href="#">Select BCeID Account User ID and Password</a>’ screen, the name of the new user is displayed. Enter a user ID or choose a user ID from the list of available user IDs presented on the screen.</li> <li>○ Enter a password, and to confirm it, enter it again.</li> <li>○ Click <a href="#">Next</a>. The account is created and the details are displayed.</li> <li>○ If you wish BCeID to notify the new BPM of their userid, click the <a href="#">Send</a> button; an email will be sent.</li> </ul> </li> <li>● If the Secretary Treasurer or delegate has a BCeID but is not set up with the role of BPM, have the existing BPM upgrade their BCeID to the role of BPM. <ul style="list-style-type: none"> <li>○ Login to the BCeID Website (<a href="http://www.bceid.ca/">www.bceid.ca/</a>)</li> <li>○ Select ‘<a href="#">Account Management</a>’ under ‘<a href="#">My Business BCeID Account</a>’.</li> </ul> </li> </ul>

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<b>Setup of BCeIDs for SADE</b>	
<b>Step</b>	<b>Instructions</b>
	<ul style="list-style-type: none"> <li>○ Select 'Manage Business BCeID Accounts' under 'Manage My Business'.</li> <li>○ Click on a user ID to modify its corresponding account details.</li> <li>○ On the 'Business Account Details' screen, go to the BCeID Authorizations section and use the radio buttons to select the role of Business Profile Manager for the account you selected.</li> </ul> <ul style="list-style-type: none"> <li>● <b>Alternate BCeID:</b> If it is appropriate for the existing BPM to be the Secretary Treasurer's alternate, then proceed to Step 3.</li> <li>● If it is not appropriate for the existing BPM to be the alternate to the Secretary Treasurer, then another BCeID will need to be created with the role of BPM.</li> </ul>
<b>Step 3:</b> Assign the role of Business Account Managers	<ul style="list-style-type: none"> <li>● Once the Secretary Treasurer or alternate has their BCeID set up as a BPM, they can designate a person (plus alternate) in each school district and create a BCeID for them. These BCeIDs would be set up with the role of a Business Account Manager (BAM). <ul style="list-style-type: none"> <li>○ Use the same instructions as for creating a BPM, except on the 'Create a New Business BCeID Account' screen, in the BCeID Authorizations section, set the radio-button to 'Business Accounts Manager'.</li> </ul> </li> <li>● If the district chooses to decentralize the creation of submitters to some or all of the schools, then the BAM will also create one or more BCeIDs for staff at each school within the district that is to be decentralized. These BCeIDs will also be set up as BAMs. <ul style="list-style-type: none"> <li>○ Use the same instructions as for creating a BPM, except on the 'Create a New Business BCeID Account' screen, in the BCeID Authorizations section, set the radio-button to 'Business Accounts Manager'.</li> </ul> </li> <li>● The BCeIDs of all BAMs and BPMs that require access to SADE/DX2 need to be communicated to the SADE Administrator at the Ministry, to initiate the setup of their access to DX2 and SADE. (Once the access is setup, the Secretary Treasurer will be notified and provided with subscription codes for DX2 Access)</li> </ul>
<b>Step 4:</b> Assign the roles of Releasers and Submitters	<ul style="list-style-type: none"> <li>● The BAM can create one or more BCeIDs for staff at the district, who are designated as Releasers. <ul style="list-style-type: none"> <li>○ Use the same instructions as for creating a BPM, except on the 'Create a New Business BCeID Account' screen, in the BCeID Authorizations section, set the radio-button to 'BCeID User'.</li> </ul> </li> <li>● The BAM can create one or more BCeIDs for staff at the schools, who are designated as Submitters. If</li> </ul>

Setup of BCeIDs for SADE	
Step	Instructions
	<p>the district chooses to centralize the creation of Submitters at the school district, then the School District BAM will perform this task. If decentralized, then the BAMs at each of the schools will create the Submitters:</p> <ul style="list-style-type: none"> <li>○ Use the same instructions as for creating a BPM, except on the 'Create a New Business BCeID Account' screen, in the BCeID Authorizations section, set the radio-button to 'BCeID User'.</li> </ul>

## Guidelines for Creating Business BCeIDs

The following are some general guidelines for setting up BCeIDs, to make it easier for your Administrators to identify staff using the system.

1. Enter your First Name, Last Name (do not enter the name of the school district or generic identifiers like "School Principal").
2. Avoid using nicknames.
3. Since each BCeID belongs to an individual and passwords are not to be shared, ensure you choose your 3 security questions and answers carefully.
4. See the BCeID Home Page ([www.bceid.ca/](http://www.bceid.ca/)) under "Frequently Asked Questions" for a link to the pdf document "Account/Profile Management Tools Guide" which describes how to manage your BCeIDs or click on this link: ([www.bceid.ca/files/public/ProfileAccountManagementTools.pdf](http://www.bceid.ca/files/public/ProfileAccountManagementTools.pdf))

Questions about BCeID can be directed to the BCeID Help Desk:

Canada Toll Free: 1 888 356-2741

Lower Mainland: 604 660-2355

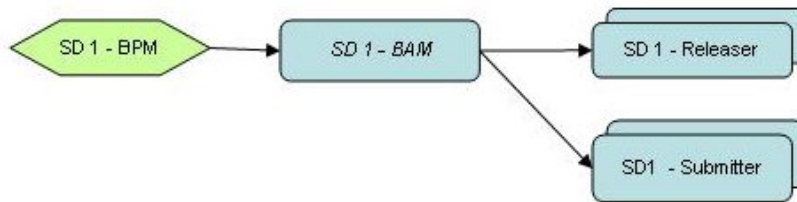
Email: BCeID@gov.bc.ca

## Examples of Different BCeID Approaches

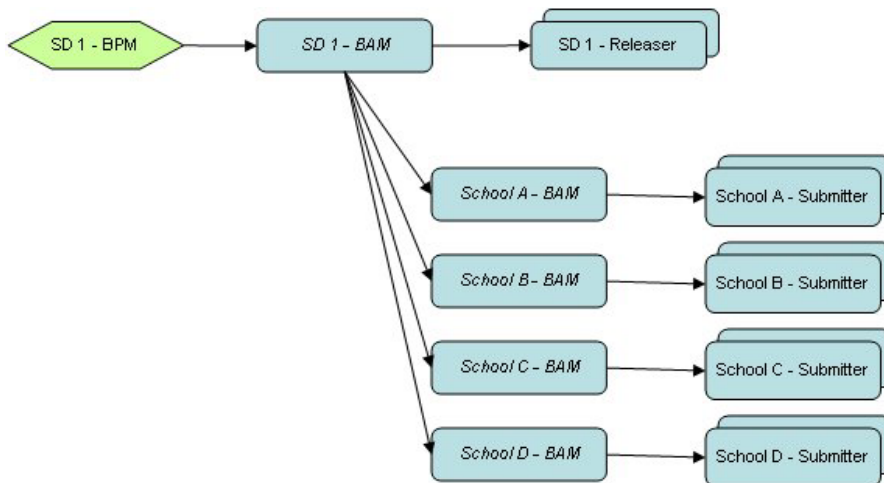
School districts have a variety of ways to manage the submission of data to the Ministry. Some are “centralized”, and have a team at the district that does most of the submissions on behalf of the schools. Others “decentralize” this work, and ask each school to submit their own data, then just the final signoff is done at the district level.

Districts may set up their BCeID roles in a similar way. Here are a few examples.

- In the **centralized model**, a BAM is created at the school district level. The BAM will set up all the BCeIDs for the district staff who will submit and release data on the schools’ behalf.



- In the **decentralized model**, a BAM is created in each of the schools, to set up the BCeIDs for the staff at that school. Each school can then submit their own SADE data.



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- Districts can also customize their approach by using a hybrid model, where the district may do the data submission for some small schools, but allow other larger schools to submit on their own.
  - School A's data is submitted by the district staff, on the schools behalf
  - Some schools submit their own SADE data, but the school district sets up their BCeIDs (see school B in diagram);
  - Schools C and D submit their own SADE data, and have their own BAM to create their Schools Submitter BCeIDs.

