Module Five: Admin

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Introduction

Within this module we will look at the various sections of FrogProgress which can be used for administration. There are three main applications we will use in this section which are **Groups and Policies**, **Users** and **System Preferences**.

Groups and Policies is available to **staff** and **administrators**. Users and System Preferences are only available to **administrators**.

Groups



Groups are a really important part of FrogProgress. Groups are used to create trackers and in reporting, and having the right groups set up can make your life much easier.

There are two main methods of adding and populating groups to the platform; through an MIS integration or through a CSV import. In the normal set up process, year and class groups will be added to the platform and populated through one of

these processes before you come to use Progress.

However, there are instances when users might wish to create their own groups within Progress. For example, if a primary school run a split-year class system, the teacher may want to have two separate groups for each year within the class to make tracking easier. If a class is split into sets for Maths, it might be easier for reporting to create Maths sets to compare and contrast progress throughout the year.

Foups and Policies	6			
	Select P	rioritise	New Group	Ö -
Search Groups	P	Class	Y	MIS
6W 5		Class		
Blackbirds 3		Class		
Class One 5		Class		
Justice Class 5		Class		
Miss Vosper 6		Class		
Mrs Mabey Class 6		Class		
Reading Group 1		Class		
Training Class 3		Class		

A view of the Groups and Policies application showing Class groups.

Creating a new group

As previously mentioned, the main creation of class and year groups will likely be done when the platform is set up. This module assumes that the main group creation process is already complete, and that new groups need to be created by individual teachers or admins for a specific purpose – rather than for classes or year groups.

To create a new group, open the Groups and Policies application. This application can be found under the Quick Launch icon, the Quicklinks dashboard (Progress only) or the applications section of FrogDrive. For further information on navigating the system please see **Module One: Getting Started**.

Once the application is open, users should be able to see a blue **New Group** button in the middle of the application. Single click on this button to create your new group.

You will be asked to fill in two fields:

Create Group	×
Group name: * Enter a group name	
Group type: *	
i î î î	
	Cancel Save

Group name: the name of the group you are creating. Remember that everyone can see this name so make it individual. You don't want to end up with six "maths" groups!

Group type: This drop down is primarily used in the CSV import. We would normally recommend using the Class group type.

When you have filled in your details, click the blue **Save** button.

You will now see your new group appear. It will automatically be	X Groups and Policie	es			
highlighted in blue.	class	Select Prioritise Type	New Group	¢ ∙ MIS	Users 0 Pol Search Users
	Class Three	Class			
	Class Two 0	Class			

Adding new users to a group

Now that you have your new group, you will want to add some users to it. The easiest way to add users to a group is to make sure that the group is highlighted as above, then use the grey **Edit** button in the right hand side of the app to open the group in edit mode.

×					a ^r
Groups and Policies				Manage	Troubleshoot
Select	Prioritise New Group	Q -	Users D Policy		Edit
class 🗶	Туре 🔻	MIS	Search Users		
Class Three 0	Class				
Class Two 0	Class				
Groups and Policies				Manage	Troubleshoot
Users O Policy	Cancel	Save	Find users to add into group Class Two		
Search Users	ρ		Search Users		

To add users into the group, use the search on the right hand side to find individual users. Click on their names to add them to the group. Their names will move to the left hand side showing that they have been added.

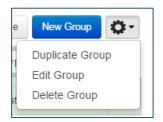
Groups and Policies			Manage	Troubleshoot
Users 1 Policy	Cancel Save	Find users to add into group Class Two		
Search Users	Unsaved changes!	alij 🗶		
Claire Bailey	Leader 💥	N Kenny	Staff	
		Alistair Gill	Student	

When you are happy with your changes, use the blue **Save** button. The edit panel will slide shut and you will be able to see all users you have added to your group in the group preview panel.

Groups and Policies				Manage	Troubleshoot
Select Pri	oritise New Group	٥-	Users Policy		Edit
Search Groups	Туре 🔻	MIS	Search Users		
Restricted Student	System Admin		Claire Bailey		
6W 5	Class				
Blackbirds 3	Class				
Class One 5	Class				
Class Two 1	Class				

Duplicating a group

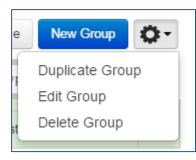
When a group is selected, the **action cog** at the top of the page can be used to **duplicate** the group. In certain situations, it may be appropriate to duplicate a group, rather than create a new group. For example, you may wish to create a group with 20 of your 30 class students in it. Rather than manually add all 20 students into the group, it would be easier to duplicate your class group, edit it as above and remove the 10 unwanted students.



Editing a group

If you wish to edit the name of a group, or the group type, the route to take is the **action cog** followed by the **edit** option.

This will give you an Edit Group window where you can edit the group name and type:



Edit Group			×
Group name: * Class Two Group type: * Class	×		
		Cancel	Save

Use the blue **Save** button to save your changes.

Deleting a group

To delete an unwanted group, select it by single clicking on it and use the **action cog** to choose the **Delete Group** option.

e New Group 🔅 -	Delete Group?
Duplicate Group Edit Group	Are you sure you want to delete this group?
Delete Group	Cancel Delete Group

You will be presented with an "are you sure?" prompt. Use the **red Delete Group** button to delete the group or the grey **Cancel** button to return to the previous screen.

Note: Once deleted, groups cannot be restored. Please ensure you are happy to delete your group before removing it. Student tracker data (evidence and judgements) is not tied to groups so deleting a group will not remove this data from Student Tracker.

Policies

Policies dictate what users can and cannot do within FrogProgress. Some policies are set on the different profiles by default (for example, only administrators can access Curriculum Manager). Other policies can be added and removed by the school administrators to give certain groups more or less power in the platform.

Checking Existing Policies

To check what policies might already be set on a group, first open the **Groups and Policies** application. Single click on the group you wish to check and click the **Policy** tab on the right hand side.

(Groups and Policies				M	anage	Troubleshoot
	Sele	ect Prioritise New Grou	₽ Ö ▼	Users 4 Policy			Edit
	Search Groups	Р Туре •	MIS	Search Policy	ρ		
*	Year5 40	Year	¥	This group's policy has the following roles			a
	Year 6 44	Year	\checkmark	Apps			•
	Year R 39	Year	~	Widgets			
				Magers			
	Admin 🚨 🌓	Admin		Frog Developer Platform			÷
	Other 🚺 🌓	Other					
	Parent 321	Parent					
	Staff 45	Staff					
Ţ	Student 287	Student					

Policies are split into three sections, Apps, Widgets and Frog Developer Platform. For FrogProgress only customers, the main area to focus on is Apps. Clicking on the various sections will expand them so that you can view the different policies already applied.

By default, the only groups with policies attached will be the profile groups (visible in orange for administrators) and a small selection of example policy groups (visible in green at the top of the groups list). Groups which are white do not have any policies attached.

Adding New Policies

In some situations, it might be appropriate to add more policies to a group. For example, a group of teachers who are designated as curriculum or subject leads may need access to Curriculum Manager. In this situation, you would add the users to a **New Group** and then add policies to the group to give them the required access.

To add a new policy, first select the group you wish to use.

	Select Pri	oritise New Group	Q -	Users 1 Policy	lit
	Search Groups	Туре •	MIS	Search Users	
*	Class Two 1	Class		Mrs S Vosper	
	Curriculum Manager Teachers 1	Job Role			

Click the **Policy** tab on the top right of the group window. Then choose the **grey Edit** button on the right hand side of the application.

Groups and Policies	Manage Troubleshoot
Users 1 Policy Cancel Save	Add roles to group Curriculum Manager Teachers's policy
Search Policy	Search Roles
	Apps
	Widgets
	Frog Developer Platform
This group does not have a policy - use the edit button to add roles	

Use the search box on the right hand side if you know which policies you wish to add. Alternatively use the drop down under Apps to find the right application (for example, Curriculum Manager).

When you have found the policies you wish to add, use the + button to add them to the group.

Groups and Policies			Manage	Troubleshoot
Users 1 Policy	Cancel Save	Add roles to group Curriculum Manager Tea	achers's po	olicy
Search Policy	Unsaved changes!	curriculum 🗶		
This group's policy has the following roles		Apps		+
Apps	÷.	🖹 🛔 Curriculum Manager		Þ
Curriculum Manager	•	Edit and Manage Curriculum		2+
Access Curriculum Manager				
		Widgets		•
Widgets	Þ.	Frog Developer Platform)
Frog Developer Platform	•			

Once added, they will be visible on the left hand side. Use the **ON/OFF** button to turn the relevant policies on or off for the group.

When you are happy with your choices use the **Save** button to save the group.

You will then be able to see the policies attached to the group from the main Groups and Policies screen.

Groups and Policies			Manage	Troubleshoot
Select Price	New Group	Q -	Users 1 Policy	Edit
Search Groups	Туре 🔻	MIS	Search Policy	
Curriculum Manager Teachers 1	Job Role		This group's policy has the following roles	
Admin Roles 1	Job Role		Apps	*
HTML Staff 3	Job Role		Curriculum Manager	~
Hockey Team 🙎 🌔	Club		Access Curriculum Manager	ON 2
Senior Staff / Delegated Admin 🚺 🌓	System Admin		Edit and Manage Curriculum	ON 2

Removing Policies

To remove policies from a group, follow the same steps outlined above to edit the policies.

Policies can either be turned **OFF** using the **ON/OFF** option, or they can be removed using the grey X.

Apps	Þ
Curriculum Manager	Þ
Access Curriculum Manager	III OFF

Priorities

The ability to add policies to different groups does introduce the possibility of conflict. For example, what happens if a user is in a group where the policy Access Curriculum Manager is turned ON and a second where it is turned OFF? The answer lies in the Prioritise button which sits at the top left of the Groups and Policies screen.

Groups and Policies	Manage	Troubleshoot
Select Prioritise New Group 💭 Users 1 Policy		Edit
Search Groups 🔎 Type 🔹 MIS Search Policy 🔎		
Curriculum Manager Teachers 🛾 🌔 Job Role This group's policy has the following roles		

This button allows administrators to order groups to ensure that their policies cascade in the correct way.

When **Prioritise** is selected, users will be able to see a list of all groups with policies attached to them. Using the move icon, groups can be dragged up and down the list to give them greater or lesser priority. The policies of the group at the top will override the ones below and so on and so forth. To give a group greater priority, move it up the list. To reduce its priority, move it down the list.

Groups and Policies			Manage	Troubleshoot
			Can	cel Save
Curriculum Manager Teachers	10	Job Role		
Admin Roles 🔳 🌔		Job Role		
HTML Staff 3		Job Role		

Note: The Profile groups do not appear in the Prioritise window. They are considered a base line for all users and so you can consider them as having the lowest possible priority.

Users



The Users application allows administrators to view, edit and manage the user accounts on their platform.

As with the Groups, normally users will be imported either from the MIS or through a CSV import before you come to use the platform. As such, this module anticipates that the majority of users have already been added onto your platform.

Adding Users

Users can be added into FrogProgress in a variety of ways:

- Manually through the Users application
- By a CSV import
- By the MIS import

We will not go into detail of the MIS import route here. For more information on the MIS import please see our Knowledge Base <u>here</u>.

Manually adding Users

To manually add a user, open the Users application. Select the **New User** button in the top right corner.

User Management Use						Users	
						Search	ρ
Use	r Management					Select New User	Q -
	First Name	Last Name 🔺	Username	Registration	Year	Profile	MIS
199	frog	admin	frogadmin			Admin	
$\overline{\mathbf{U}}$	Jenny	Admin	jennyvadmin			Admin	

On the subsequent screen you will see a selection of fields to fill in to add detail about the user. There are several required fields on different screens:

User Management / New User				Cancel Save
Basic Information	\frown	Title:	Select •	
Authentication Additional Information	$(\bullet \bullet)$	First Name:		
Group Membership		Middle Name:		
Relationships	Change Photo	Last Name:	*	
	Account Status:	Profile:	* Select •	
		Email:		
		Gender:	Select a gender 🔹	
		D.O.B:	dd/mm/yyyy	
		User Drive:		

Basic Information:

Basic Information

Last Name – the surname of the user

Profile - select the Profile you wish the user to have

We would also recommend populating the First Name field.

Authentication:

Authentication

Authentication – by default this will be Frog. This does not normally need to be changed.

Username – what will the username of the user be.

New Password – set their password.

Retype Password – confirm their new password.

Force user reset on next login – do you want them to be able to set their own password when they first log in?

	Middle Name:	
	Last Name:	*
	Profile:	* Select •
field.	Email:	
	Gender:	Select a gender 🔹
	D.O.B:	dd/mm/yyyy
Authentication:	Erer	
	Frog	•
Username: *		
Now Deseword		

Select

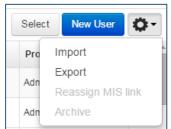
Title:

First Name:

Username:	*
New Password:	*
Retype Password:	*
	Force user reset on next login

When you are happy with your settings, use the blue **Save** button to save your new user.

Adding users through a CSV import



This method is really useful for adding lots of users in one go.

To add users through a CSV import, you must first build your CSV. FrogProgress has a strict structure for CSVs which must be followed for a successful import. An example of this format is available within FrogProgress under the Users application > **action cog** > **Import** and the blue **information** icon.

When you have your CSV file containing the correct headers, you need to add in the details of the new users.

C	SV Import	×
1.	1 Upload Files must be in the correct format ()	
2.	Validate	
3.	Import	
	Cance	el

There are a certain number of fields on the CSV that either must be populated at import or are a good idea to populate prior to import. These are:

Image: System of the	frogos_users_2016 <mark>0223_</mark> 112708 - Excel AS DATA REVIEW VIEW		? I Jenife
A Cut Calibri 11 A A Paste Image: Copy of the second		Conditional Format as Cell prmatting * Table * Styles*	 ➤ AutoSum ▼ Fill * Clear * ➤ Sort & Find & Filter * Select *
Clipboard 15 Font 15	Alignment 🕞 Number 🕞	Styles Cells	Editing
H19 \checkmark : $\times \checkmark f_x$	4 I J K L M N O P Q		X Y Z AA AB
1 UUID Usernam Title Forenam Middle N: Surname Profile Ema	il Gender DOB Year Registrat Class House Job Role Location Clubs	Account Authentic Passwork Force Pa Roll Num UPN Star	t Dati Leave Da Date use User Drive

Username: The username of the user.

Forename: The forename of the user.

Surname: The surname of the user.

Profile: The profile they will belong to. This must match the name of the profile in FrogProgress exactly, i.e. Admin, Staff, Student, Parent, Other.

Account Status: This should be entered as Active.

Authentication: This should be entered as Frog.

Password: The password for the user.

You may also want to populate the group columns and the **Force Password Reset** column depending on how you will be managing these user accounts.

A good way to see how your CSV should look is to use the action cog in the Users application to Export the users who are already in Progress. This will let you see the kind of information which you should be filling in for new user accounts.

When you have your CSV file, save it locally and head back into FrogProgress. Use the action cog and choose the **Import** option as outlined above.

Upload your file using the blue **Upload** button. FrogProgress will scan the file to verify that it can be imported. If there are any problems, you will be informed in an error message and you will be given the option to download an error log which will tell you more detail about the error.

If there are no problems, use the blue **Import Users** button to import your new users.

be able to users in	CSV Import				
	1.	Upload successful 🤡			
	2.	Estimated import time ~1 minutes			
		Validation Successful 97 of 97 users can be imported			
	3.	Import			
		Cancel Import Use	rs		

You will then be able to see your new users in the user list.

Editing Users

Occasionally it might be necessary to edit a user. This could be to edit their password or their username.

There are two ways to edit a user account, manually through the Users application or by a CSV.

Note: If a user account is linked to the MIS, certain fields cannot be updated in Frog. These include the Forename and Surname fields and group membership of any MIS linked groups. This information will need to be updated in the MIS which will then be pulled through into FrogProgress automatically.

Manually editing users through the Users application

To manually edit a user through the Users application, open the Users application and locate the user you wish to edit.

Single click on their account and use the grey **Edit** button in the top right hand corner to open their account in edit mode.

User Management			Users
User Management / Claire Ba	ailey	Edit	Q -
Basic Information	\frown	Miss Claire Bailey	
Authentication		Profile: Student	
Additional Information			
Group Membership		Email:	
Relationships	Account Status:	Gender:	
		D.O.B:	
		User Drive:	

You will now be able to make any necessary changes to the user account. Use the blue **Save** button to save your changes when complete.

Editing a user using a CSV

A CSV would normally be used for editing multiple user accounts at once. For example, if a set of users need to have their passwords updated or you want to add contextual data for students.

Open the Users application and use the action cog to export all the users from FrogProgress.

Use	er Managemer	nt					Users
						Search	Q
Use	er Management				1	Select	w User 🔅 -
	First Name	Last Name	Selec	t New User	Year	Profile	MIS
*	frog	admin	Pro	Import		Admin	
Ð	Jenny	Admin		Export		Admin	
			Adn	Reassign MIS link			
			Adn	Archive			

The Export button will download a CSV file of all the users in the platform. Depending on which users you wish to edit, we would recommend cutting down the CSV by group, or profile, to reduce the amount of user accounts you will have to deal with.

Edit your CSV to make the required changes and save it locally. When you have your CSV file, follow the **Import** instructions under the action cog to complete the editing process.

Archiving Users

Archiving users from FrogProgress is done through the Users application. Archiving users can be done manually (one at a time) or in bulk to save time.

Note: Any users who are linked to the MIS cannot be removed from FrogProgress. The user must pass their leaving date or be removed from the MIS which will break the MIS link to FrogProgress. The user can then be archived using one of the methods below.

IMPORTANT: Please make sure that you are happy for these users to be deleted before proceeding.

Removing individual users

To archive individual users from FrogProgress, open the Users application and find the user you wish to remove.

Click on the user and click on the action cog in the top right hand corner of their account screen:

User Management			Users
User Management / Barry Alle	n		Edit Ör-
Basic Information	\frown	Mr Barry Allen	Import
Authentication Additional Information	$(\bullet \bullet)$	Profile: Student	Export Reassign MIS link
Group Membership		Email:	Archive
Relationships		Gender:	
	Account Status:	D.O.B:	
		User Drive:	

Use the **Archive** button to archive the user.

You will be presented with a warning window. If you are happy to remove the selected user, click the red **Archive** button.

You will see a notification telling you that the user account has been archived, and it will no longer appear in the User application.

Archive user account?	\times
Archiving accounts could result in loss of access to content created by this user.	
Are you sure you wish to archive the selected user?	
Cancel Arch	ive

Removing users in bulk

To remove more than one user at a time, open the Users application and click the **Select** button.

Use	r Ma	nagement						Users			
						Searce	:h	P			
User Management / Edit 3 of 96 users selected Select New User											
		First Name	Last Name 🔺	Username	Registration	Year	Profile	MIS			
*	0	frog support	admin	frogsupportadmin			Admin				
÷		Jenny	Admin	jennyvadmin			Admin				
*	0	frog	admin	frogadmin			Admin				

Click on the grey tick icons next to the First Name field to change them to green and select the users to be removed.

When you have chosen the users to be removed, use the action cog and select Archive.

Use	r Ma	nagement					Users
						Searce	ch 🔎
User	Mana	gement / Edit			3	of 96 users selected	Select New User
		First Name	Last Name 🔺	Username	Registration	Year	Pr Import
*	0	frog support	admin	frogsupportadmin			Ad Reassign MIS link
$\overline{\mathbf{u}}$		Jenny	Admin	jennyvadmin			Ad Archive
*	0	frog	admin	frogadmin			Admin
*		Barry	Allen	flash			Student

Again, you will receive a warning window. If you are happy to continue, click the red **Archive** button.

Archive user accounts?	×
Archiving accounts could result in loss of access to content created by these users. Are you sure you wish to archive the 3 selected users?	
Cancel	ive

Student Contextual Data

If you are school which uses SIMS for your MIS then contextual data for students will automatically be added when student users are created in FrogProgress.

For schools using a different MIS then you will need to add contextual data for your new students; e.g. any new class intake and any students who have joined other classes.

Importing Contextual Data via CSV

Schools not using SIMS can import contextual data via a CSV file, as seen in the example below.

Mrs Student 1 Mr Student 2 Mrs Student 3 Mr Student 4 Mrs Student 5 Mr Student 7 Mrs Student 7 Mr Student 8 Mrs Student 9	lide Sumame Profile Frog Stud Student Frog Stud Student	student1 F student2 M student3 F student4 M student5 F student6 M student7 F student8 M		real Ke	M M M	liss Vos liss Vos liss Vos liss Vos liss Vos	per per per per	LOCALC	Active Active Active Active Active	Frog Frog Frog	N		ROTIOPN	Start	## ##	## ##	Y Y Y		nted a	Y Y	Y Y	(Service C	incare i	raveller
Mr Student 2 Mrs Student 3 Mr Student 4 Mrs Student 5 Mr Student 6 Mrs Student 7 Mr Student 8 Mrs Student 9	Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student	student2 M student3 F student4 M student5 F student6 M student7 F student8 M			M	liss Vos liss Vos liss Vos	per per per		Active Active	Frog	N				##	##	Y			Y	Y			
Mrs Student 3 Mr Student 4 Mrs Student 5 Mr Student 6 Mrs Student 7 Mr Student 8 Mrs Student 9	Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student	student3 F student4 M student5 F student6 M student7 F student8 M			M	liss Vos liss Vos	per per		Active	Frog	N							(Y	Y			
Mr Student 4 Mrs Student 5 Mr Student 6 Mrs Student 7 Mr Student 8 Mrs Student 9	Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student	student4 M student5 F student6 M student7 F student8 M				iss Vos	per																	
Mrs Student 5 Mr Student 6 Mrs Student 7 Mr Student 8 Mrs Student 9	Frog Stuc Student Frog Stuc Student Frog Stuc Student Frog Stuc Student	student5 F student6 M student7 F student8 M			z										##	##		Y						
Mr Student 6 Mrs Student 7 Mr Student 8 Mrs Student 9	Frog Stud Student Frog Stud Student Frog Stud Student	student6 M student7 F student8 M			2	A A																		
Mr Student 8 Mrs Student 9	Frog Stud Student Frog Stud Student	student7 F student8 M			- L		AB		AC		AD		AE		Δ	F		AG		AH	1 1	AI	AJ	
Mrs Student 9					\vdash			_		-		+					-				-	•		
					te	Use	SEN	En	glisha	aGif	ted a	r P	Pupill	Pre	Free	e Sch	nd Se	ervice (CIN	Care	Trav	/eller	Childr	
Mr. Student 10		student9 F			\rightarrow			v						-			-							
	Frog Stud Student	student1 M			##		Y	Υ.				Y	r		Y									
					##		Y	1				Y	1											
							· ·	<u> </u>				1					-							
					##			Y I				Y	(Y									
								î.		v														
					***			I		T		_							_					
					##			! Υ																
												+		-										
					##			i –		Y							Y							
					##			1									Y							
								<u>-</u>				+												
					##					Y									Y					
								î.				+							v					
					**			I											T					
					##			1													Y			
	Mr Student 10	Mr Student 10 Frog Stud Student	Mr Student 10 Frog Stud Student student1, M	Mr Student 10 Frog Stud Student student1 M	Mr Student 10 Frog Stuc Student student1,M	######################################	## ## ## ## ## ## ## ##	## Y ## Y ## ## ## ## ## ## ## ## ## ## ## ## ## ##	## Y ## Y	## Y ## 1 ## 1 ## 1 ## 1 ## 1	## Y ## Y	## Y Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y ## Y	## Y Y ## Y Y	## Y Y ## Y Y	## Y Y ## Y Y	## Y Y ## Y Y	## Y Y ## Y Y	## Y Y ## Y Y	## Y Y Y ## Y Y Y	## Y Y Y ## Y Y Y	## Y Y Y Y ## Y Y Y Y	## Y Y Y Image: Second and indication of the second andindication of the second and indication of the second and indicati	## Y	## Y

There are 4 steps you will need to take to add the contextual data for your students:

- 1. Export your current user data from FrogProgress
- 2. Sort your data to leave only students who require contextual data adding
- 3. Add in your contextual data for each student
- 4. Import the data into FrogProgress

<u>Step 1</u>

You will need to export a csv of your users from the Users section of FrogProgress. See the section on <u>'Editing a user using a CSV'</u> earlier in this guide.

<u>Step 2</u>

Open the CSV that you have downloaded from FrogProgress using a relevant spreadsheet package, e.g. MS Excel. Sort your CSV so that you can remove any users who don't need to have any contextual data added, i.e. any staff or admin accounts can be removed and any students who already have contextual data added. Save your spreadsheet in the .csv format once you have updated it; remember where you have saved it.

Note: It is important NOT to remove any columns from the CSV.

Step 3

Now, using your school's MIS system, update the columns in the spreadsheet. At this point you will need access to your school's contextual data. Depending on how you have this will obviously change the way you populate Frog. We assume you have a printed list of the following contextual data groups:

- SEN
- English as an Additional Language
- Gifted and Talented
- Pupil Premium

- Free School Meals
- Service Children
- In Care •
- Traveller Children •

If a child appears in any of the categories above, then you will need to put Yes in the corresponding cell in the spreadsheet. You will need to do this for every child who appears in each of the categories. Once you have completed this save the spreadsheet again.

Step 4

You now have a data rich spreadsheet and you now need to put that back into FrogProgress.

Open the Users application and click on the **action cog**. Select the **Import** option from the menu.

×							e ²			
Use	r Management						Users			
					Sea	arch	Q			
Use	User Management Select New User 🔅									
	First Name	Last Name 🔺	Username	Registration	Year	Pro	Import			
-	frog support	admin	frogsupportadmin			Adn	Export Reassign MIS link			
÷	Jenny	Admin	jennyvadmin			Adn	Archive			
-	Frog	Admin	frogadmin			Admir	1			

The CSV Import window will open. Clie button an screen se you want

Г

open. Click on the Uploac button and on the file uplo screen select the CSV file t you want to upload	l Dade		nust be in the correct format 🥡	×		
		3. Import	File Uploader Choose Files Accepted file types: vnd.ms-excel, csv frogos_users_training - Primary.csv	el		
Once the file is	cs	SV Import				
uploaded click the Done button. The CSV	1. Upload successful 🔗					
Importer will then check the file and validate it to ensure	2.	Estimated import time ~1 minutes	Drag and drop your files here Only select files for which you have the licence to use. Done			
there are no errors.		Validation Successful 15 of 20 users can be imported		8		
		Validation Error 5 of 20 user records cannot be imported	1			
	3.					
			Cancel Download Error Log Import Users			

Note: If you find there are errors after you've uploaded your data, you will have the option to download an error log. That will inform you, line by line of data errors in your CSV file. After correcting errors in the CSV file, resave it and upload to FrogProgress again.

If your validation is successful × **CSV** Import then you can click on the blue Import Users button to finally 1. Upload successful 🕑 update the users. 2. Estimated import time ~1 minutes Validation Successful 14 of 14 users can be imported 3. Import Cancel Import Users \times CSV Import Once your users have finally been 1. Upload successful 🕑 imported you will see receive confirmation. Click the blue **Close** 2. Validation Complete 🕑 button to finish the process. 3. Import complete 🕑 if you have any queries, please contact the Service Desk on 01422 Validation Successful 15 of 15 users have been imported 395939 or servicedesk@frogeducation.com

Manually Adding Contextual Data

Schools not using SIMS can also modify a student's contextual data via the Users application. This process is only recommended if small changes are required.

To open the Users application, navigate to **FrogDrive > Applications** and select the application **Users**.

FrogDrive					
Applications					0-
	*	11 li In line	5		
	Community	Curriculum Manager	FrogDrive	Groups and Policies	
	T	(3)	SS2		
	Reporting	Student Tracker	System Preferences	Users	

Search for the user you wish to add or modify contextual data for. Select the user and then click on the **Edit** button.

User Management				Users
User Management / Tracy Wil	son			Edit 🗘 🗸
Basic Information	\bigcirc	Miss Tracy	/ Wilson	
Authentication		Profile:	Student	
Group Membership	\mathbf{C}	Email:	twilson@frogeducation.com	
Relationships	Account Status:	Gender:	Female	
Student Contextual Data		D.O.B:		
	Last Modified: 21/03/2016	User Drive:		

Select Student Contextual Data from the left hand side menu.

User Management					Users
User Management / Tracy Wil	son			Cancel	Save 🔅 -
Basic Information	\bigcirc	Title:	Miss	\$	
Authentication Additional Information		First Name:	Тгасу		
Group Membership	$\mathbf{\Theta}$	Middle Name:			
Relationships		Last Name:	• Wilson		
Student Contextual Data	Change Photo				
	Account Status:	Profile:	Student	\$	
	Last Modified:	Email:	twilson@frogeducation.com		
	21/03/2016	Gender:	Female	\$	
		D.O.B:	dd/mm/yyyy		

A list of contextual data fields will be displayed.

User Management			Us	sers
User Management / Tracy V	Wilson		Cancel Save	0 -
Basic Information Authentication	Special Educational Needs:	Not Known	\$	
Additional Information Group Membership	English as an Additional Language:	Not Known	\$	
Relationships Student Contextual Data	Gifted and Talented:	Not Known	\$	
	Pupil Premium:	Not Known	\$	
	Free School Meals:	Not Known	\$	
	Service Children:	Not Known	\$	

Select the drop down menu next to the contextual data you wish to update and select one of the options available, i.e. Not Known, Yes or No.

User Management			Users
User Management / Tracy	Wilson		Cancel Save
Basic Information Authentication	Special Educational Needs:	✓ Not Known Yes No]
Additional Information Group Membership	English as an Additional Language:	Not Known	•
Relationships Student Contextual Data	Gifted and Talented:	Not Known	\$
	Pupil Premium:	Not Known	\$
	Free School Meals:	Not Known	\$
	Service Children:	Not Known	\$

When happy with the contextual data options selected click on the **Save** button. The changes will be applied immediately for the selected user.

System Preferences



The System Preferences application is only available to Administrators. System Preferences can be accessed from the Quick Launch, the FrogDrive Applications section and the Quicklinks dashboard (FrogProgress only).

There are six main areas of the System Preferences app which we will outline below.

ADFS

If you wish to set up ADFS integration with FrogProgress we would recommend reading <u>this</u> <u>guide</u> to setting up ADFS, and if you have any queries, please contact the Service Desk on 01422 395939 or <u>servicedesk@frogeducation.com</u>

ADFS				OFF
Enter the ADFS url connected to your network				
When you enter your ADFS server url and click Lo a problem you can enter these certificates yoursel		ficates will be loade	ed below. If there	e is
Version				
ADFS2 •				
ADFS Server Url				
ADFS Server Url e.g. https://example.co.uk	Load Metadata			
Encryption Certificate				
Encryption Certificate				
	Dow	nload Metadata	Discard	Save

File Types

There is a white list of allowed file types in FrogProgress which dictates what file types users can upload. In certain situations, it may be appropriate to add file types to this list to extend it for certain profiles.

System Preferences								
ADFS		File Types				1		
File Types								
MIS Importer	Show	Select Profile :	Please select	*				
Maintenance	Show			System Prefer	ences			
School Details				ADFS		File Types		
School Details				File Types				
				MIS Importer	Show	Select Profile : Admin v		
Select Profile:	: This drop	down will al	low you to	Maintenance	Show	From Default Tumos		

Sch

select the profile you wish to view or edit the allowed file types for.

stem Prefere	ences	
FS		File Types
Types		
Importer	Show	Select Profile : Admin v
intenance	Show	Frog Default Types
ool Details		
		Custom Types

When you have chosen your profile, there are

two further options available. Frog Default Types will allow you to view the current white list. **Custom Types** will present a text box where administrators can type in the file extensions of any files they may wish users to upload.

MIS Importer

The MIS Importer area is only relevant if your school is using an MIS Import. If you are using a CSV file to update your users, this area is not relevant to your school.

The MIS Importer area is generally only used when the MIS import is first set up, or if something needs to be changed between academic years (for example, the username format for new users).

There are three areas within the MIS Importer area:

Usernames

The Usernames area dictates how usernames will be set for new user accounts. The username field is only affected by these settings when the user is first imported. To change the usernames of users who exist on Frog, please see the sections above on editing users.

Each profile has a different username field where the administrator can specify the username format t

hey wish to use. The small blue 🤇	1	icons will provide furthe	r information a	about each field.
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System Preferences		
ADFS	Username Format	
File Types		
MIS Importer Hide	Student	
Usernames	Autocorrect 'Start Date'	i
Display Name	Username Creator	
Document Permissions	Use tags to create default usernames on MIS import. Visit the Help section to learn about username tags.	
Maintenance Show	{{first_name}}{{last_name limit=1}}	
School Details		
	Cancel	Save

We will normally provide support to set up this section for new FrogProgress schools.

Display Name

The **Display Name** area offers two options:

- Use chosen first name: This field will take the chosen first name set in the MIS and use it throughout the platform in the place of the user's legal name.
- Use chosen last name: This field will take the chosen last name set in the MIS and use it throughout the platform in the place of the user's legal name.

System Preferences				
ADFS	Dieplay Namo			
File Types	Display Name (i)			
MIS Importer Hide Usernames	Use chosen first name OFF			
Display Name	Use chosen last name			
Document Permissions				
Maintenance Show	Cancel Save			
School Details	Cancer Gave			

Document Permissions

This area is not required for FrogProgress only customers. For more information on this area for FrogLearn customers, please see the in platform Help.

Maintenance

System Prefer	ences		
ADFS			0-
File Types		MIC Import Information	
MIS Importer	Hide	MIS Import Information	
Usernames		Latest MIS import completed successfully	Download Log
Display Name			Download Log
Document Permi	ssions		
Maintenance	Hide	Next import is scheduled for	25/02/2016 @ 02:00
MIS Import		Last import took place on	24/02/2016 @ 02:22
School Details		Latest xml file received from MIS server	23/02/2016 @ 13:57
		Frog extractor version	3.4.8
		MIS	SIMS

The **Maintenance** screen is a really useful area for schools using an MIS integration. This screen shows details of the latest MIS import, whether there were any issues, the version of the Extractor being used and the MIS FrogProgress is talking to.

If any issues are found with the MIS import using this screen we would recommend contacting the Service Desk on 01422 395939 or <u>servicedesk@frogeducation.com</u>.

School Details

System Preferences		School Details		
ADFS	School Details	Enter your school name here. It will be displayed on the version of the curriculum		
File Types		you publish to the web		
MIS Importer Hide	School Name	you publish to the web		
Usernames	Enter your school name			
Display Name				
Document Permissions				
Maintenance Hide				
MIS Import				
School Details				

Enter your school name in the **School Details** to have this name appear on your public curriculum pages.