Microsoft Settlement Project  
Data Collection User Manual  
(October 6, 2010)

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Table of Contents

UPDATES .................................................................................................................................................... 3
Welcome .................................................................................................................................................... 3
URL Address for Data Collection Center ................................................................................................. 3
Building Users .......................................................................................................................................... 3
Adding Teachers/Classroom/Courses ........................................................................................................ 3
Basic Rules for the System ....................................................................................................................... 3
Grant Managers ....................................................................................................................................... 3
Contact Information/Questions regarding the web site ........................................................................... 3
Activating an Account and Login ............................................................................................................. 4
School Menu .......................................................................................................................................... 5
Manage Users ......................................................................................................................................... 5
School Term Dates ................................................................................................................................. 7
Classrooms/Courses ............................................................................................................................... 8
Assurance Forms ................................................................................................................................... 9
Teacher Data Entry ............................................................................................................................... 11
Log off the system ............................................................................................................................... 13
Welcome
This manual has been created to help you navigate through the Microsoft Settlement Project Data Collection Website. It explains terminology, informs you of what to look for, and how to enter the requested data.

URL Address for Data Collection Center
The URL address is http://db.perl.hs.iastate.edu/microsoft. Please bookmark the url address in your web browser. If you have any problems accessing the site, please contact Arlene de la Mora (see information listed at the bottom of this page).

Building Users
Several levels of access have been created in order to meet the various needs of school personnel and to facilitate data entry. The privileges assigned to an individual user will determine which function(s) the individual is afforded on the site. For the purpose of the data collection website, each school building has a Grant Manager that is primarily responsible for managing the Microsoft Settlement Project within the school building. In most cases, the Grant Manager for the building is school principal. The Grant Manager has the greatest level of privileges (e.g., can add building coordinators, building users, teachers and signs assurance forms on behalf of the school). Please see section “Manage Users” on Page 5 for more information regarding privileges by building user.

Adding Teachers/Classrooms/Courses
Add only the teachers and their respective courses that are associated with the focus area identified in the Microsoft Settlement agreement. For example, if your school building indicated that its focus area is Literacy, add the classrooms/courses where the majority of instruction is related to literacy. Do not add classrooms/courses whose focus is not literacy (e.g., social sciences, math courses) but may utilize reading strategies. There is, however, a gray area; all courses/teachers should be added if they will be using any of the hardware/software purchased with Microsoft funds.

Grant Managers
The designated grant manager of each school is the building principal. Building principals were added to the website based on data obtained through the Iowa Department of Education. In order to access the site, grant managers will activate their accounts using their school email address. Grant Managers will be asked to create a Password as part of the activation process. Grant managers unable to access the site should contact Arlene de la Mora (see information below).

Questions regarding the web site:
If you are experiencing any difficulty or have questions about navigation, data entry, etc. please contact:

The Psychology in Education Research Lab (PERL)
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****UPDATE****
In an effort to facilitate teacher data entry, we have made a change to the Assurance Form submission process. Effective Tuesday, October 6, 2010, we are no longer requiring that all teachers submit their assurance forms before the building assurance form can be submitted. The assurance form submission process is now:
1. Grant Managers will submit an assurance form (on behalf of the building) first.
2. Teachers submit assurance forms.
3. Teacher data entry can begin for any teacher that has submitted an assurance form.

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Activating an Account and Login

All users must activate their account prior to accessing the data collection web site. Only users that have been pre-authorized will be allowed to complete the activation process. Each building has a designated Grant Manager that can add other building users and teachers. Please see “Manage Users” (page 5) for information regarding users’ level of access as well as how to add users to the building.

**Activating an Account:**

1. Go to the following url to activate: [http://db.perl.educ.iastate.edu/microsoft](http://db.perl.educ.iastate.edu/microsoft)
2. Click on the “Activate an Account” link (see Figure 1)
3. Enter your email (see Figure 2)
4. Click Send.
   
   A message indicating “your activation email has been sent, please check your email” will appear.

5. Open the email can click on the link.

6. Complete the activation process (see Figure 3).
   - Edit the first/last name as needed
   - Create a Password
   - Click Send

7. A message indicating that “your account has been activated, you may now login” will appear (See Figure 4).

**Login to Microsoft Settlement Project Data Collection Site:**

- Enter your email address and password (see Figure 4).
- Click Login

*Note:* The level of access a user has will determine what is viewed on the website.
School Menu
After you login, what appears on your screen is determined by your level of access. Grant Managers and other users with building level access will see their respective buildings. Teachers will see only their classroom.

- Click on the name of the school building to access the site (see Figure 5)

Manage Users
The Grant Manager, in most cases the building’s principal, is the person primarily responsible for managing the Microsoft Settlement Project for the school building. Initially, the Grant Manager is the only user with access to the site and will need to add users for their respective school as needed.

In order to facilitate data entry, four levels of access have been created for building users (See Table 1). It is the user’s level of access determines which privileges the user has in viewing, entering, and editing building and/or teacher data. All participating teachers must be added as users for the site, whereas, all other users (i.e., Building User or Building Coordinator) are optional. Grant Managers may add Building Coordinators or Building Users to assist with adding school term dates, classrooms/courses, teachers, data entry, etc. Please refer to the Table 1 to determine which group a building user should be assigned to. Users listed in Table 1 are in order from most restrictive (i.e., teacher) to least restrictive (Building Grant Manager).

Table 1. Group/User Privileges

<table>
<thead>
<tr>
<th>GROUP/USER</th>
<th>Add Teacher</th>
<th>Add Bldg. User</th>
<th>Add Bldg. Coordinator</th>
<th>Enter Data: Building</th>
<th>Enter Data: Teacher</th>
<th>Teacher Assurance Form</th>
<th>Building Assurance Form</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher*</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Building User</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Building Coordinator</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Building Grant Manger</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

Note: *Teachers are required users, all other users are optional.

“X” indicates function the user has access to on the website.
To Manage Users:
Note: Please refer to Table 1 to determine which group members can add other users. When adding teachers, add only the teachers and their respective classrooms/courses if the majority of the instruction spent in the course is related to focus area indicated on the Microsoft Settlement agreement.

1. Click “Manager Users” (see Figure 6).

2. Click the group (i.e., Building Teachers, Building Users, or Building Coordinators) new user belongs to (see Figure 7).

3. Enter the following information:
   - Email Address*
   - Folder Number**
   - First Name
   - Last Name
   - Click Submit

The newly added user will appear in a list along with any other users previously added (see Figure 8)

* Email Address – Please use official school email address.

** Folder Number – required only for teachers. The teacher folder number may be obtained from the Iowa Board of Examiners website: https://www.iowaonline.state.ia.us/boec/

Folder number not required for building level users.
School Term Dates

The Microsoft Settlement Project will collect teacher data for the entire academic year. Because the start and end of the school year differs between Iowa schools, each school is asked to enter school term dates.

**Entering School Term Dates:**
1. Click on “School Term Dates” (see Figure 10).
2. Click “New” to add School Term (see Figure 11).
3. Select a Term Name (e.g., Semester, Fall; Semester, Spring; see Figure 12).
4. Enter Term Start Dates and Term End Dates (see Figure 13)
5. To Edit school term date after a term has been created, click on “Edit” (see Figure 14).
Classrooms/Courses
Teachers must be added to the building before a classroom/course can be assigned to them (see Manage Users, page XXX). Only add classrooms/courses if the majority of the instruction spent in the course is related to focus area indicated on the Microsoft Settlement agreement.

Adding New Classrooms/Courses:
1. Click “Classrooms/Courses” (see Figure 15).
2. Click “New” (see Figure 16)
3. Enter Name of Course and Section Number (if applicable, e.g., Algebra 1, Section A; see Figure 17).
4. Length (Minutes) – enter the number of minutes the classroom/course meets for (e.g., 50 minutes, 90 minutes)
5. Select Building Term (select from pull down menu).
6. Select Focus
   Note: The majority of schools will have only one focus to choose from.
7. Select Grade(s) associated with classroom/course.
8. Click “Submit.”
9. A list of courses submitted for the teacher will appear (see Figure 18).

Optional Alternative Dates
The choice of alternative dates has been provided to meet the needs of some participating school buildings. Alternative choice dates are optional and in most cases will be rarely used.

Alternative Teacher Dates: Alternative teacher dates is provided as an option to deal with situations where a teacher is gone for an extended period of time (e.g., in case of illness, family leave, etc.).

Alternative Dates: Alternative dates refer to alternative classroom/course dates that differ from that of a regular school term (e.g., a course that meets for one month rather than the entire semester).
Assurance Forms

Electronic submissions of assurance forms are provided to assist participating schools ensure that all school building data (i.e., school term dates, classroom/courses, and teachers) are complete and have been validated for accuracy. Two types of assurance forms have been created, a Building Assurance Form and a Teacher Assurance Form.

**Building Assurance Forms:** The purpose of the Building Assurance Form is to assure that the school term dates, focus/strategies, classroom/courses, and teachers entered for a building are complete and correct. Building Grant Managers will be asked to submit two assurance forms for each term: (1) Start term assurance forms are required in order for teacher data entry to begin and (2) End term assurance forms are required indicating that the term is completed.

Submission of a Building Assurance Form “locks” the building from further editing. Therefore, once a Building Assurance Form is submitted, School Term Dates, Teachers, Classroom/Courses are no longer editable.

**Teacher Assurance Form:** The purpose of the Teacher Assurance Form is to assure that the list of participating classroom/courses is complete and that all participating classroom/courses assigned to a teacher is correct. Teachers will be asked to verify and validate the classroom/course information entered at the beginning of a specified term (e.g., fall semester, spring semester, fall trimester, etc).

**Who can submit forms:** Only teachers can submit Teacher Assurance Forms and only Grant Managers can submit Building Assurance Forms.
BUILDING ASSURANCE FORMS

A building assurance form must be submitted before teachers can submit their assurance forms. Submission of a building assurance form will “lock” all building data entry (e.g. teachers, classrooms/courses) preventing any changes from being made and preventing any further building data entry and

To Submit a Building Assurance Form:

1. Grant Manager must Login to the site.
2. Click “Assurance Forms” (see Figure 19)
   A list of all teachers added for the building will appear. This list will indicate the status of assurance form submission (i.e., signed or not signed) for each teacher.
3. Click “View” to submit assurance form (see Figure 19).
4. Verify school term dates, classroom/courses, and building users are complete and accurate.
5. Click “I agree” if all information is complete and accurate (see Figure 20)
6. Submit.

TEACHER ASSURANCE FORMS

To submit a Teacher Assurance Form:

1. Teacher must Login to the site.
2. Click “Assurance Forms” (see Figure 19).
3. A list of classrooms/courses associated with the teacher will appear.
4. Check “I agree” if the list is complete and accurate.
5. Click Submit.
Teacher Data Entry

Teachers are asked to submit data regarding their implementation of classroom strategies associated with the project the month following their implementation (e.g., September implementation is submitted during the month of October). Teacher data are divided into two parts: (1) classroom visits and (2) teacher implementation.

- **Classroom Visits**: Teachers are asked whether a building administrator walked through their classroom during the previous month.

- **Teacher Implementation**: Teachers are asked implementation questions for each classroom/course they are associated with.

On the initial building page, a grid indicating whether data has been submitted is provided for your convenience (see Figure 22). The grid indicates whether “all data,” “partial data,” or “no data” have been submitted. This grid will appear the first month following the first month of implementation as determined by the school term date. For example, if the school term begins in September the first month to enter data will be October.

**TEACHER IMPLEMENTATION DATA ENTRY**

1. Click “Teacher Data” (see Figure 22).
2. Select Teacher (see Figure 23).
3. Select Classroom/Course (see Figure 24)

   *Optional*: You may select one or more classroom/courses within the same focus area if implementation is the same for each classroom/course (e.g., Algebra I, section A and Algebra I, section B).

4. Click “Enter Data”
TEACHER IMPLEMENTATION DATA ENTRY (con’t.)

The number of strategies, hardware, items and software items that appear on the screen will vary across schools and is based on what schools submitted as part of their agreement with the Iowa Department of Education.

5. The building name, term, teacher, month of implementation and classroom/course selected will appear (see Figure 25)
   - If you used the option of selecting more than one classroom/course when entering data, both classrooms/courses will appear (see Figure 26).

6. Enter the number of days the strategy was implemented in the previous month (see Figure 25).

7. Enter the number of days the hardware and software indicated were used the previous month.

8. Submit
   - The website will log the name of person submitting the data as well as the date and time the data was submitted (see Figure 27).
**CLASSROOM WALKTHROUGH**

1. Select “Enter” in section marked “Classroom Walkthrough” (see Figure 28).

2. Answer “yes” or “no” (see Figure 29).

3. Click “Submit”

4. The website will log the name of person submitting the data as well as the date and time the data were submitted.

**Log off the System**

A logout feature is available on all pages of the website. It is located in the right hand corner of the page. Logging off of the website will take you back to the initial login page (see Figure 30).

When access to the site is no longer needed, please make sure to logoff. This action will help protect the integrity of the data.