# SCDE Report Portal: Student Locator BI Report Users' Guide

Office of Research and Data Analysis

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*South Carolina Department of Education*

# Table of Contents

## Document History

| Version | Date | Author | Description |
|---------|------|--------|-------------|
| 1.0 | 06/26/2024 | Swetha Chinthapally | Document Created – Includes *Student SUNS Locator* BI Report Instructions. |
| 1.1 | 12/12/2024 | Swetha Chinthapally | Document Updated – Added DEIM *Student Locator Coordinator* role requirement for full report access. Removed "SUNS" word from report title and other sections within the documentation to align with the current naming convention. |
| 1.2 | 4/15/2025 | Swetha Chinthapally | Updated first page (logo, title layout) to align with 2025 SCDE agency branding template (*Operating Manual Template*). Added contact information for *Student Locator* report questions under the *Purpose* section. No changes made to instruction content. |

## Purpose

This document provides necessary steps for a user on how to access, login and navigate the *South Carolina Department of Education (SCDE) Report Portal* for Business Intelligence (BI) reports. It explains how to generate the *Student Locator* BI report.

For questions about the *Student Locator* BI report, please submit an e-services ticket to SCDE for assistance.

Currently, the 'SCDE Report Portal' contains the 'Data Quality & Reporting' application and a few BI reports. With further releases, more reports will be added.

## How to Log into the 'SCDE Report Portal' via *Application Web Portal* (New Member Center)

1. Log into the *Application Web Portal* (New Member Center): Start a web browser (E.g. Microsoft Edge, Google Chrome, and Firefox) and browse https://appportal.ed.sc.gov/my.policy direct link for the New Member Center or *Application Web Portal*'s login page.

   You can also go to the SCDE's website at https://ed.sc.gov and click on the 'Login' link to reach the *Application Web Portal*'s login page, as shown in Figure 1.
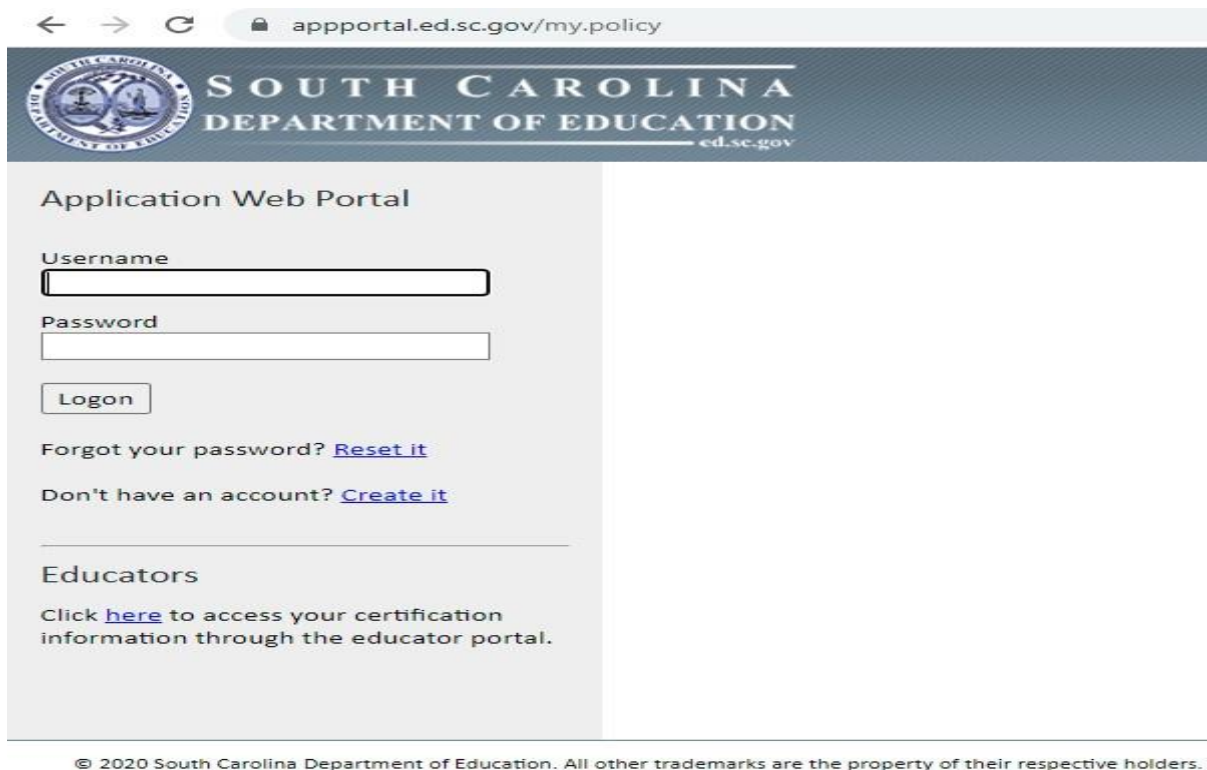


*Figure 1. New Member Center: Application Web Portal Login Page*

2. On the *Application Web Portal* website's login page, enter your *Username* and *Password* in the appropriate boxes and click on the 'Log On' button. If you do not have an SCDE web account for this web site, please contact your District's Web Access Administrator (WAA) for assistance. In addition, you can submit a request to create an account using the 'Create it' option on the *Application Web Portal* login screen, as shown in Figure 2.

   **Note:** If you have issues when you try to sign in with *Password*, you can reset it and regain access to your account using 'Reset it' link, as shown in Figure 2.
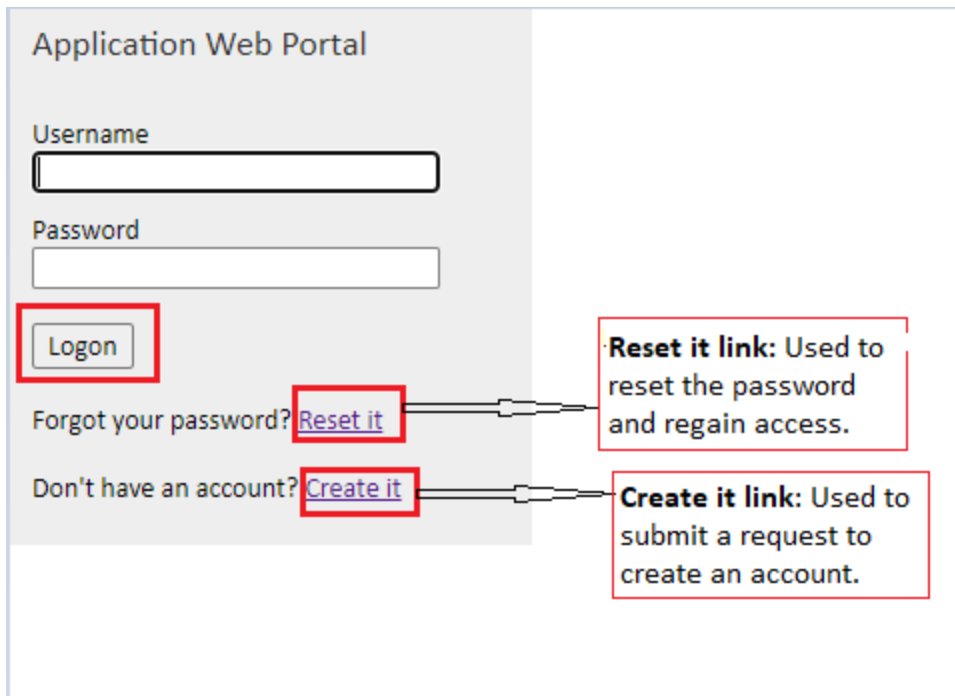
*Figure 2. Application Web Portal Website's Login Page: 'Logon', 'Reset it', and 'Create it' Options*

3. Once you log into the *Application Web Portal*, you will see the 'Report Portal' link under "Applications" header, as shown in Figure 3. If you do not see the 'Report Portal' link, please contact your District's Web Access Coordinator (WAC) for assistance.
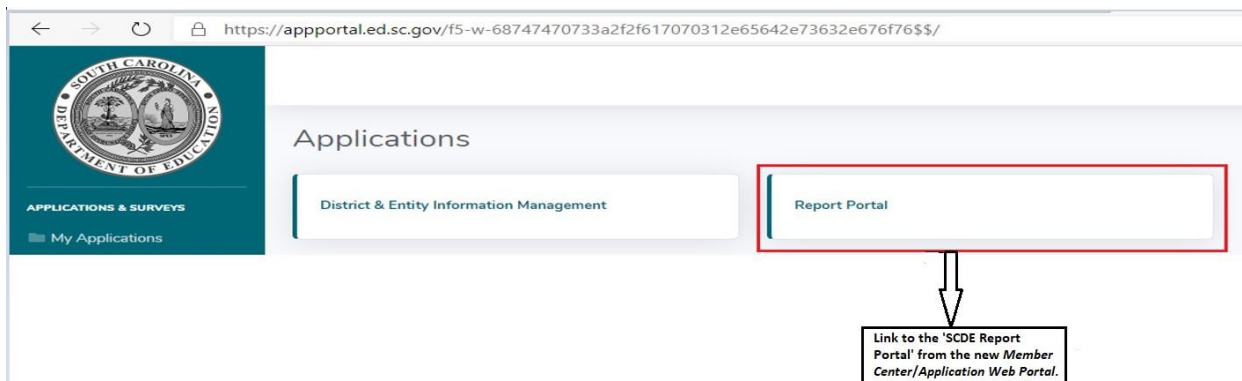


*Figure 3. Application Web Portal: Report Portal Application*

4. After clicking the 'Report Portal' link in the *Application Web Portal*, you will be redirected to the 'SCDE Report Portal' login page. Enter your *User ID* and *Password* in the appropriate boxes and click on the 'Sign In' button, as shown in Figure 4. If you do not have a *User ID* and *Password* for this Portal, please contact your District's Web Access Coordinator (WAC) for assistance.

**Note:** When you access the 'Report Portal' from the new *Application Web Portal*, the New Member Center's menu bar with 'Home', 'Search', and 'Logout' options are displayed on the upper left corner of the Report Portal application pages. To shrink the menu bar, click the left arrow button (◄) on left side of the menu bar, as shown in Figure 4 and Figure 5.



*Figure 4. SCDE Report Portal Login Page: 'Sign In' Option and the Application Web Portal's Menu Bar*



*Figure 5. Shrink the Application Web Portal's Menu Bar on the Report Portal Application Pages*

# Report Portal Pages Overview: State and District Views

Once you log into the 'SCDE Report Portal', if you are a State-Level user or a District-Level user, your screen will default to the 'Home' page in the Portal, as shown in Figure 6 and Figure 7.

As a State-Level user, you can access State BI reports and documents under *Reports* menu or link, **as your role allows**. In addition, you can access the 'Data Quality & Reporting' application and the 'Data Quality Reports' links from the ***Data Quality*** dropdown menu, as shown in Figure 8.

As a District-Level user, you can access District report cards, BI reports and documents from the *Reports* menu or link, **as your role allows**. In addition, you can access 'Data Quality & Reporting' application and 'Data Quality Reports' links from the ***Data Quality*** dropdown menu, as shown in Figure 9.
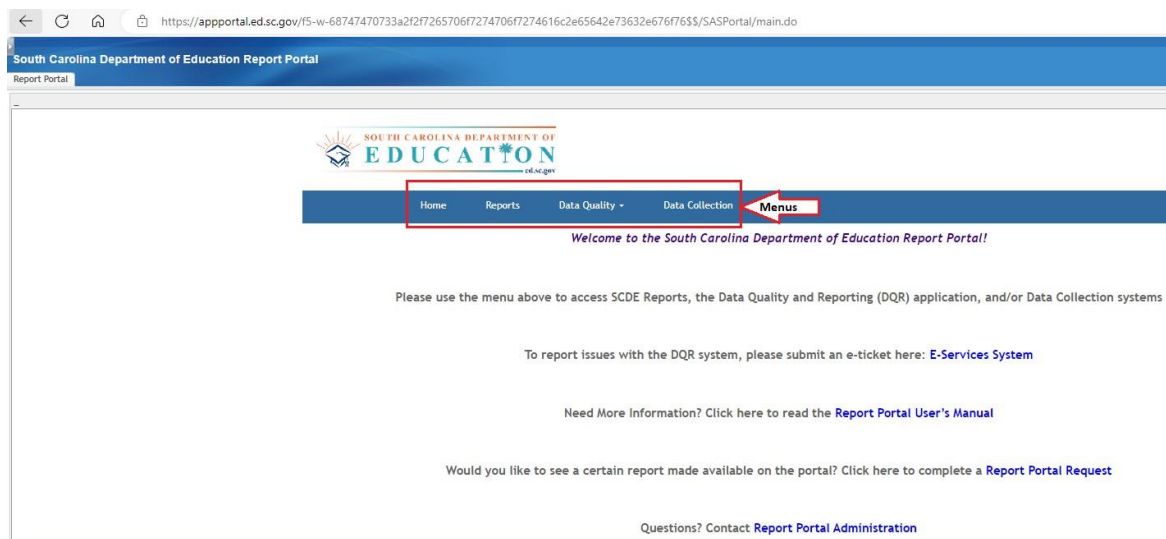


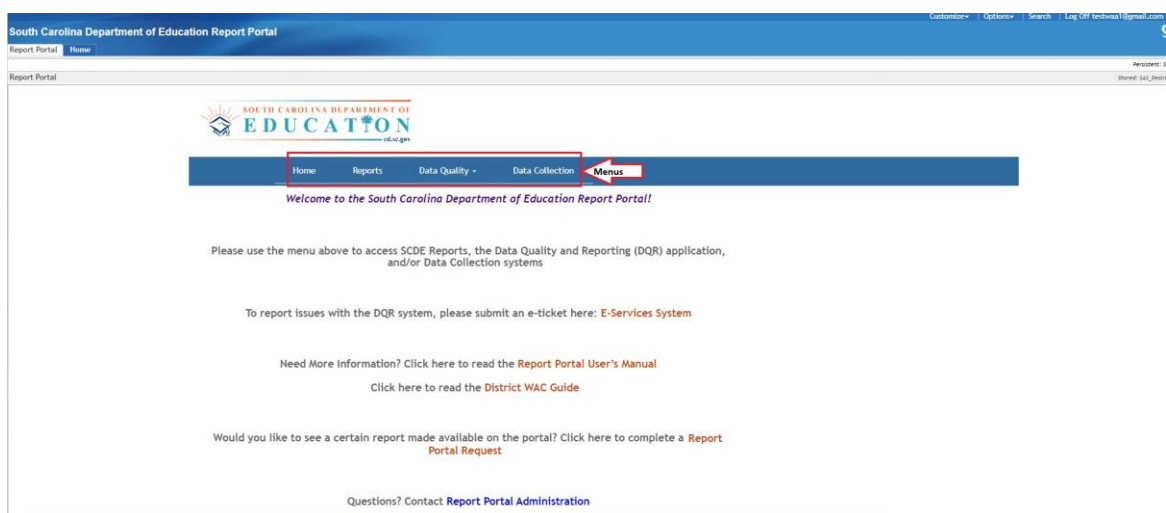*Figure 6. State-Level User: Report Portal Home Page, Menus*



*Figure 7. District-Level User: Report Portal Home Page, Menus*

*Figure 8: State-Level User: 'Reports' Menu*



*Figure 9: District-Level User: 'Reports' Menu*

# 'Home' Page in the Report Portal

On the 'Home' page, you can request a specific report to be made available on the Portal by clicking the 'Report Portal Request' link. This link directs you to a form where you can enter the necessary data to request a report, as shown in Figure 10 and Figure 11. Additionally, any questions about the Report Portal can be submitted through the '*Report Portal Administration*' link, as shown in Figure 10 and Figure 12.

For any issues related to the Data Quality and Reporting (DQR) application, you can submit an e-ticket via the 'E-Services System' link.
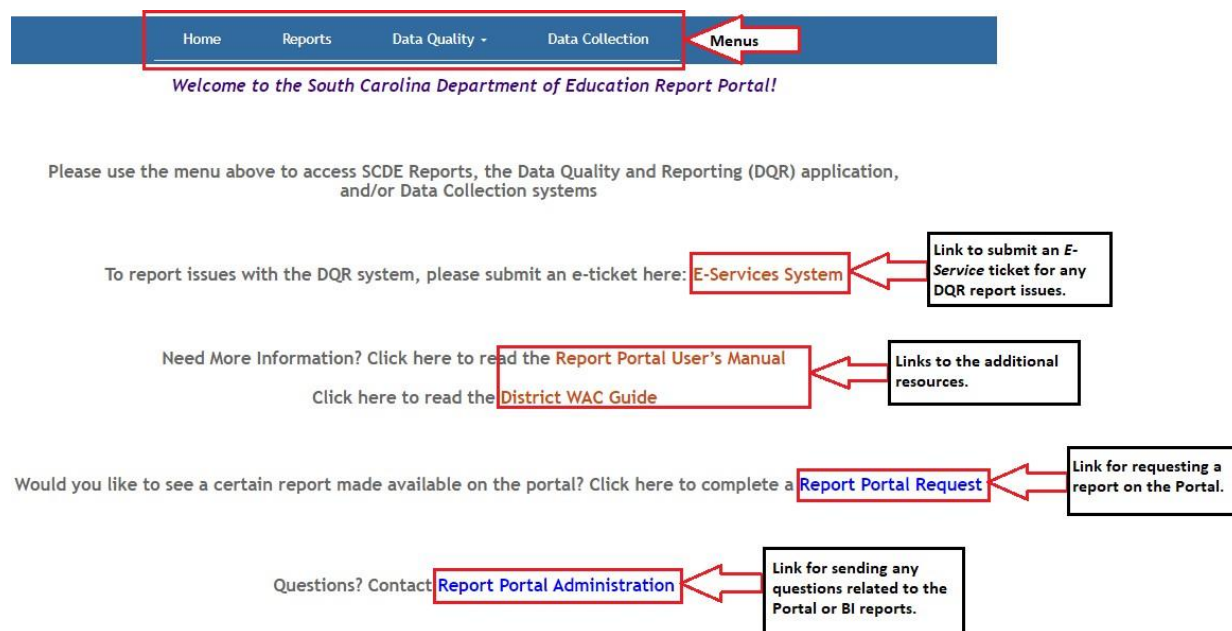


*Figure 10. Report Portal: Home Page Links to E-ticket, Report Request, and Questions*

Input form to enter the data for submitting a report request on the Portal.

South Carolina Department of Education Report Portal Request

Use this form to request a report for the SCDE Report Portal

* Required

1. Your Full Name *

Enter your answer

2. Your Phone Number *

Enter your answer

3. Your Email Address *

Enter your answer

4. Agency / Division/ Office

*Figure 11. Report Portal Request Link: Request a Report Form*



**Stored Process email_FAQ**

☐ Show only required items (denoted by *)
General

*Email
Enter your email address

*Organization Type
Enter your organization type (e.g., SCDE, District, School)

*Organization Name
Enter name of organization (e.g., name of school district, school, SCDE)

Input form to enter the data for sending questions related to the Report Portal.

*Program Office
Enter name of program office/department

*Category
Enter question category (e.g., enhancement request, general, error, how to)

*Question
Enter your question about the Report Portal

Run

*Figure 12. Report Portal – 'Report Portal Administration' Link: Input Form to Send Questions on the Report Portal*

## *Student Locator* BI Report

District-Level and State-Level users can access the *Student Locator* BI report through the Portal. After logging in, navigate to the 'Reports' dropdown menu, then select the 'Other Reports2' section and click on the *Student Locator* link, as shown in Figure 13.

**Prerequisites for Accessing the Report – Role Assignment**: To successfully access and run the *Student Locator* report, ensure the following:
- Users must be assigned the ***Student Locator Coordinator*** role in District and Entity Information Management (DEIM).
- The assigned email address in DEIM must match the user's login email for the SCDE Report Portal (e.g., firstname.lastname@districtdomain.org). This alignment ensures proper identification and access within the Portal.
- If a generic or a functional email is used (e.g., district.student.locator@districtdomain.org), it must be replaced or supplemented with the user's personal email address.

*Note*: Correct role assignments and matching login email addresses are essential for full access. For any issues, confirm that the user's role is correctly assigned in Access Management Tool (AMT) and DEIM, and ensure their login email address is updated accordingly.

**Prepare the CSV file**: To prepare your data for querying enrollment information, open Excel (or another spreadsheet application). In the first column, copy and paste all the students' State Identification Numbers (*State IDs*) for whom you want to retrieve the enrollment details, as shown in Figure 14. Once you have all the *State IDs* in the first column, save the file in CSV (Comma delimited) format. For optimal processing speed, limit each list to no more than 1,000 IDs. If you have more than 1,000 IDs, create multiple CSV files, each containing up to 1,000 IDs.

**Upload the CSV file**: When you click the *Student Locator* link, you will be directed to a page where you can upload your CSV file. Click the '***choose file'*** button, then select your prepared CSV file from your computer and click *Open*, as shown in Figure 15 and Figure 16.
Once the file is uploaded, click the '***ok'*** button, as shown in Figure 17.

**View Enrollment Information**: After clicking '***ok***', you will then be taken to a page displaying the most recent enrollment information or results for all the students' *State IDs* you have uploaded. The displayed information or results can be downloaded via a downloadable link labeled as 'Download file to Excel', as shown in Figure 18. This link allows for easy access and further analysis of the data presented.

**Note:** The instructions are identical for both District-Level and State-Level users, and the *Student Locator* report can be found under the '**Reports**' dropdown menu within the Portal for both user types.

# Other Reports2

- Special Programs Reporting
- Student Demographic Reports
- Student Locator
- Student Teacher Ratios

'Student Locator' report link.

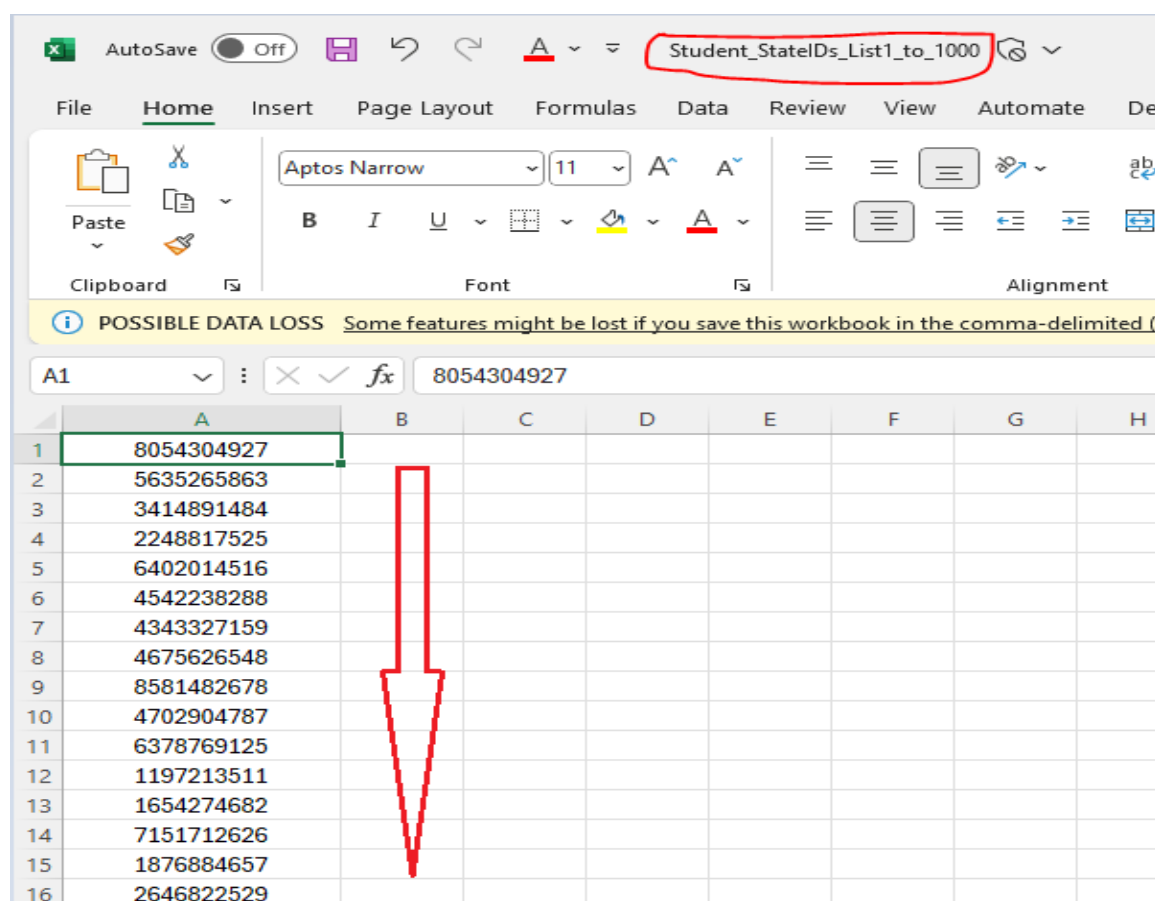*Figure 13. Report Portal – 'Reports' Menu: 'Student Locator' BI Report Link*



*Figure 14. Prepare the CSV File: Student State ID Numbers*

Copy all StateIDs to the first column and save as csv format. List is limited to 1,000 IDs for fast processing. Separate into multiple files if more than 1,000. Upload here: Choose File No file chosen

OK

*Figure 15. 'Student Locator' Report Page to Upload the CSV File: 'Choose File' button*
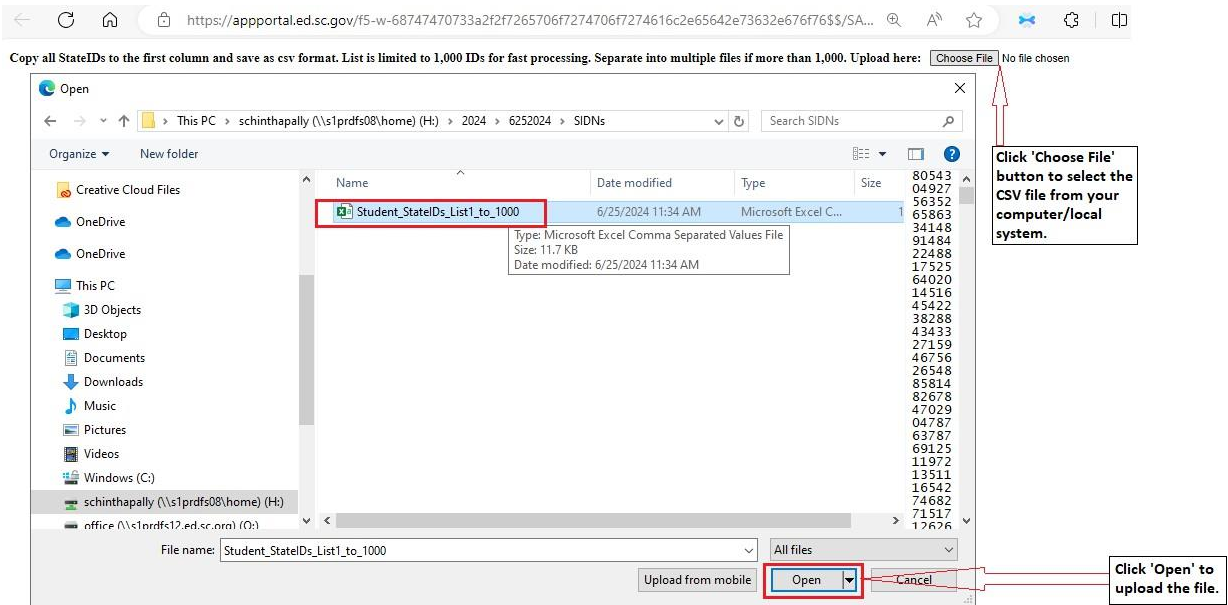
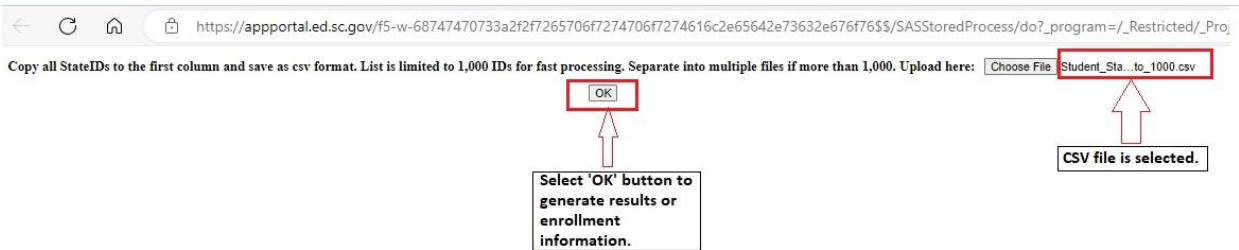*Figure 16. 'Student Locator' Report: Pop-up Window Facilitating File Selection and Upload*



*Figure 17. 'Student Locator' Report: CSV File Selected and Click 'OK' Button to Generate Results*



*Figure 18. 'Student Locator' Report: Enrollment Information or Results*

# Logout of the 'SCDE Report Portal'

You can log out of the 'SCDE Report Portal' at any time by clicking on the *Log Off* link at the upper right corner of the Portal, as shown in Figure 19.

**Note:** To log out from the Report Portal, use only the Portal's *Log Off* link and not the New Member Center's '*Logout*' option.



*Figure 19. Report Portal: Log off Link*



*Figure 20. Report Portal: Signed Out Confirmation*