

Sharing Tracking Feature Documentation

What is this feature?

Sharing tracking is a system function that keeps track of the historical share actions for each student performed by each user. This is a separate function from the Access Logging function within SpEd Forms.

A historical entry is created for each of the following actions:

Case Manager Change	Edit Permissions Change	MA Permissions Change
Access Grated change	Student Pickup (Find/Request)	Mass changes (Student Sharing Report)

This information can then be searched in the provided Share Tracking searchable report.

How do I use this feature?

This feature does not need to be turned on. It is on by default and cannot be turned off. It will track all uses of the sharing activity within SpEd Forms and make that information available to administrators.

How do I use the Sharing Tracking Report?

The screenshot shows the SpEd Forms interface with a top navigation bar containing buttons for Overview, Educators, Students, Reports (selected), Organization, and Files. Below this is a sub-navigation bar with buttons for GenEd Forms, SpEd Forms (selected), MA Forms, Custom, and Super Admin. A toggle switch indicates 'Searchable' is selected over 'Quick'. The main area displays a grid of 21 reports, each with a document icon and a number. Report #21, 'Sharing Tracking Report', is highlighted with a red rectangular box.

1. Child count/list	2. Caseload/access
3. Student list	4. Duplicate students
5. Student sharing	6. Teacher workload analysis
7. Combined report	8. Timeline monitoring
9. Team meetings in the next 90 days	10. Active student count (by school)
11. Services	12. Service logs
13. Disability count	14. Case management agenda
15. View student history	16. Find students without history
17. Grade rollover	18. Find students outside my permissions
19. Forms in PDF format	20. Service Logs by Provider
21. Sharing Tracking Report	

The Share Tracking report has been added as Report #21 on the Admin Reports -> SpEd Forms page.

When first navigating to the page, this is what an administrator will see:

The screenshot shows the 'Sharing Tracking Report' page. At the top, there is a blue header bar with the text 'Sharing Tracking Report' and a yellow bar below it with the text 'Login: 237 minutes'. Below these bars is a search criteria form. The form is titled 'Search Criteria:' and contains several fields. On the left side of the form, there is a red number '2' next to the 'Type of Change' dropdown menu. In the center, there is a red number '1' next to the 'From' date field and a red number '4' next to the 'MARSS ID' text input field. On the right side, there is a red number '3' next to the 'User making Change' dropdown menu and a red number '3' next to the 'User Changed' dropdown menu. The form also includes a 'First Name' text input field and a 'Last Name' text input field. A 'Search' button is located at the bottom right of the form.

Sharing Tracking Report
Login: 237 minutes

Search Criteria:

From: MM/DD/YY 1 To: MM/DD/YY 1

Type of Change 2 ---Select Type--- 3 User making Change ---Select User--- 3 User Changed ---Select User--- 3

MARSS ID: 4 First Name: Last Name:

Search

Since the share tracking indicates both who is making changes as well as which user's permissions have been changed, it is possible to search by both.

1. From / To Date search
2. Type of change
 - a. Permissions Changes
 - i. Permissions for access changed
 - b. Case Manager Change
 - i. Student assigned to different case manager.
 - c. Sharing Change
 - i. User granted access
3. User Search options
 - a. User Making Change
 - i. This is the user who initiated the change in sharing.
 - b. User changed
 - i. This is the user whose permissions were changed
4. Student Search Options
 - a. These are the same as other search controls within SpEd Forms for student search.
 - b. MARSS ID is an exact search field. It will not work with partial matches.
 - c. First/Last Name do allow partial matches.

[Export to file](#) 1

Share Change Date	Student Information	Changed by	User Affected	Location Changed	Specific Action
02/22/2019 07:54 AM	Student, Sample 3232323232323	Sample User A	Sample User B	Student Sharing/Transfer	User granted Edit Access
02/22/2019 07:54 AM	Student, Sample 3232323232323	Sample User A	Sample User B	Student Sharing/Transfer	User given access to student
02/22/2019 07:54 AM	Student, Sample 3232323232323	Sample User A	Sample User B	Student Sharing/Transfer	User granted MA Access
02/22/2019 07:46 AM	Student, Sample 3232323232323	Sample User A	New Case Manager: Sample User C Old Case Manager: Sample User B	Student Setup	Student Moved to Inactive Case Manager
02/22/2019 07:45 AM	Student, Sample 3232323232323	Sample User A	New Case Manager: Sample User C Old Case Manager: Sample User B	Transfer to New Case Manager	Student sharing and access removed for all prior users Student assigned to new Case Manager
02/22/2019 07:34 AM	Student, Sample 3232323232323	Sample User A	New Case Manager: Sample User C Old Case Manager: Sample User B	Student Setup	Student Picked Up using Find/Request
02/22/2019 06:29 AM	Student, Sample 3232323232323	Sample User A	New Case Manager: Sample User C Old Case Manager: Sample User B	Admin Student Sharing Report	Student assigned to new Case Manager Edit access granted MA access granted
02/19/2019 01:31 PM	Student, Sample 3232323232323	Sample User A	New Case Manager: Sample User C Old Case Manager: Sample User B	Find/Request Student	Student assigned to new Case Manager Student Picked Up using Find/Request

2

1. Export Button

- a. Download all results as a CSV file – able to be opened by MS Excel and other spreadsheet programs
- b. In addition to the columns displayed, the user IDs have also been added to the CSV file.

2. Results table

- a. Share Change Date
- b. Student information
 - i. Last name, First name
MARSS ID
- c. Changed by
 - i. The user performing the changes to sharing and permissions
- d. User Affected
 - i. The user whose permissions are changed.
 - ii. In the case of case manager changes, both the new case manager and old case manager are listed.

- e. Location Changed
 - i. The page where the change was made.
- f. Specific Action(s)
 - i. The specific sharing actions performed.