School Data Sync (SDS)

Deploy Settings with School Data Sync

This section covers how to deploy School Data Sync for your M365 Education subscription. This section will assume that your tenant has already been provisioned, access to SIS users/rostering data is available, and that the user will be a Global Administrator. with student and teacher identities along with Azure AD group. Refer to School Data Sync (SDS), Azure AD Connect, or Microsoft Graph to provision groups and user identities if needed.

School Data Sync Overview

School Data Sync (SDS) is a free service in Office 365 for Education that reads the school and roster data from a school's Student Information System (SIS). It creates Office 365 Groups for Exchange Online and SharePoint Online, class teams for Microsoft Teams and OneNote Class notebooks, school groups for Intune for Education, and rostering and SSO integration for many other third party applications.

SDS helps to automate the process of importing and synchronizing Student Information System (SIS) data with Office 365. The tool also gives application developers a single cloud API to use for creating applications that integrate with multiple SIS providers, along with single sign-on (SSO) capabilities. App developers can use the API to access section, student, teacher, school, and class roster information to personalize experiences for teachers and students who use their apps.

Configure Settings for SDS Sync Profile for New Users

In this task, we will review the requirements, CSV formats, the configuration of your sync profile, and the enablement of security groups.

Prerequisites

- Microsoft 365 Education Tenant.
- Your Microsoft 365 user account has global administrator permissions.

CSV File Formats

The CSV deployment method requires the creation and/export of data from your SIS. It must be exported into one of the supported CSV formats listed.

- [SDS Format](#)

- [SDS V2 Format](#)
- [OneRoster v1.0 Format](#) (converts into the SDS format)
- [Clever Format](#)

Once you have the files exported and properly formatted, proceed with configuring your sync profile.

Accessing the School Data Sync admin center

1. Navigate to **https://sds.microsoft.com/Home/Dashboard** to log into your Microsoft 365 Education tenant with your Global Administrator account.
2. Sign in with the following credentials:
   a. Type **admin@contoso.com** and hit Enter
   b. Type **password** and hit Enter
   c. Click the **Yes** button to stay signed in

Add your sync profile

1. Click **Add Profile** to begin configuring your sync profile.
2. Enter **Contoso School District** as name for your profile.
3. Select the **Upload CSV files** for your sync method.
4. Select **CSV files: SDS Format** as the format of your CSV files.
5. Click on the **Start** button.

Configuring your sync profile for New Users

1. Select the **New users** option. This will cause your sync profile to create Microsoft 365 user accounts based off the Username, Name, and Password fields in your CSV files. The Password included in the files is temporary, and users will be prompted to update their password when they first sign-in.
2. Under **Import data**, click on **Upload Files**.
3. Click on **Add Files** to browse for your CSV files.
4. Select the files you want to upload and click **Upload** to allow validation to process for your files.
5. Once validation completes, click **OK**.
6. Click on the **scroll bar** to scroll down.
7. Click on the arrow for **school properties** to expand the selection
8. Click on the arrow for **section properties** to expand. Any optional properties detected in your files will be automatically checked. For the purpose of this guide we will continue with the default selection.
9. Click on the **scroll bar** to scroll down.
10. **Team Creation Option**
    a. Checking this box will create a M365 Group and Class Team for each section synced.
    b. Leaving this box unchecked will create the M365 Group only but allow the teacher to specify which of the M365 groups they want a Class Team for.
    c. For the purpose of this guide we will keep the default selection.
11. **Replace unsupported special characters**
    a. Checking this box will automatically replace [unsupported special characters](#) while syncing from the source.

b.   For the purpose of this guide we will keep the default selection.

12. **Sync option for section group display name**
    a.   Checking this box will allow section names to be overwritten by teachers.
    b.   Leaving the box unchecked allows the section name from the source files to overwrite any display name changes made by teachers.
    c.   For the purpose of this guide we will keep the default selection.

13. **Delay student access**
    a.   Enabling this option will put the enrollment of students on hold until the date you have selected.
    b.   Disabling this option will enroll the students immediately into their classes.
    c.   This date **cannot** be modified after the profile is created.
    d.   For the purpose of this guide we will keep the default selection.

14. **When should we stop syncing this profile? (Required)**
    a.   This will set the expiration date of the sync profile. You will typically want this date at the end of the term you are syncing. Once the date is reached, it will pause your profile.
    b.   This date can be modified at any time after the profile is created.
    c.   Click on the **calendar icon.**
    d.   Select the number **30** to set the date to 09/30/2020.

15. Click on the **Next** button.

Teacher options

1. **Select domain for teachers**
    a.   This will create the teacher accounts in the domain you have selected. It will combine the Username field with the domain. Username@domain.com
    b.   For this exercise we will keep the default selection.

2. **Select teacher properties**
    a.   Any optional attributes detected in your files will automatically have them checked.
    b.   Click on the arrow for **teacher properties** to expand the selection
    c.   For the purpose of this guide we will keep the default selection.

3. **Teacher Licenses**
    a.   Select a license SKU for your teachers.
    b.   Choose No License if you do not want the sync profile to assign licenses.
    c.   For the purpose of this guide we do not assign licenses at this stage.

4. **Click Next**

Student options

1. **Select domain for students**
    a.   This will create the student accounts in the domain you have selected. It will combine the Username data with the domain. Username@domain.com
    b.   For the purpose of this guide we will keep the default selection.

2. **Select student properties**
    a.   Any optional attributes detected in your files will automatically have them checked.
    b.   Click on the arrow for **student properties** to expand the selection
    c.   For the purpose of this guide we will keep the default selection.

3. **Student Licenses**
   a. Select a license SKU for your students.
   b. Choose No License if you do not want the sync profile to assign licenses.
   c. For the purpose of this guide we do not assign licenses at this stage.
4. Click on the **Next** button.

Review

1. Please take time to review the options and properties you have selected for the sync profile.
2. Click on the **scroll bar** to scroll down.
3. If everything looks correct, click on **Create profile** to begin the sync.

Setting Up

Setting up the profile in the real-time environment can take a few minutes. After some time has passed, refresh the page to view the sync status of your profile. After refreshing, it will begin to process your data through several stages. User accounts will be created based off the data in your student and teacher files. Any username that may already exist in your Microsoft 365 will not be recreated; it will be updated instead.

For the purpose of this guide, wait for a couple of seconds until the sync status changes to **Sync is complete and ready for more data**.

Sync is complete and ready for more data

Once your profile has completed its sync, you are now ready to enable the **Security Group Sync**.

Enabling Security Group Sync

1. In the School Data Sync admin center in the left panel, click on **Settings**.
2. Click on the **scroll bar** to scroll down.
3. Click on the **toggle button** to **enable School Security Group Sync** and click **OK**.
   a. Enabling this feature will create and manage three security groups for each school synced.
       i. School
       ii. Teachers of School
       iii. Students of School
4. Click on the **toggle button** to **enable All Teachers Security Group Sync** and click **OK**.
   a. Enabling this feature will create and manage an **All Teachers** security group.
5. Click on the **toggle button** to **enable All Students Security Group Sync** and click **OK**.
   a. Enabling this feature will create and manage an **All Students** security group.

Configure Settings for SDS Sync for Existing Users

In this task, we will review the requirements, CSV formats, the configuration of your sync profile, and the enablement of security groups.

Prerequisites

- Microsoft 365 Education Tenant.
- Your Microsoft 365 user account has global administrator permissions.

CSV File Formats

The CSV deployment method requires the creation and/export of data from your SIS. It must be exported into one of the supported CSV formats listed.

- SDS Format
- SDS V2 Format
- OneRoster v1.0 Format (converts into the SDS format)
- Clever Format

Once you have the files exported and properly formatted, proceed with configuring your sync profile.

Accessing the School Data Sync admin center

1. Navigate to **https://sds.microsoft.com/Home/Dashboard** to log into your Microsoft 365 Education tenant with your Global Administrator account.
2. Sign in with the following credentials:
    a. Type **admin@contoso.com** and hit Enter
    b. Type **password** and hit Enter
    c. Click the **Yes** button to stay signed in

Add your sync profile

1. Click **Add Profile** to begin configuring your sync profile.
2. Enter **Contoso School District** as name for your profile.
3. Select the **Upload CSV files** for your sync method.
4. Select **CSV files: SDS Format** as the format of your CSV files.
5. Click on the **Start** button.

Configuring your sync profile for Existing Users

1. Select the **Existing users** option. This will cause your profile to match your source data to the users that already exist within your Microsoft 365 Education tenant.
2. Under **Import data**, click on **Upload Files**.
3. Click on **Add Files** to browse for your CSV files.

4. Select the files you want to upload and click **Upload** to allow validation to process for your files.
5. Once validation completes, click **OK**.
6. Click on the arrow for **school properties** to expand the selection.
7. Click the **scroll bar** to scroll down.
8. Click on the arrow for **section properties** to expand. Any optional properties detected in your files will be automatically checked. For the purpose of this guide we will continue with the default selection.
9. Click the **scroll bar** to scroll down.
10. **Team Creation Option**
    a. Checking this box will create a M365 Group and Class Team for each section synced.
    b. Leaving this box unchecked will create the M365 Group only but allow the teacher to specify which of the M365 groups they want a Class Team for.
    c. For the purpose of this guide we will keep the default selection.
11. **Replace unsupported special characters**
    a. Checking this box will automatically replace unsupported special characters while syncing from the source.
    b. For the purpose of this guide we will keep the default selection.
12. **Sync option for section group display name**
    a. Checking this box will allow section names to be overwritten by teachers.
    b. Leaving the box unchecked allows the section name from the source files to overwrite any display name changes made by teachers.
    c. For the purpose of this guide we will keep the default selection.
13. **Delay student access**
    a. Enabling this option will put the enrollment of students on hold until the date you have selected.
    b. Disabling this option will enroll the students immediately into their classes.
    c. This date **cannot** be modified after the profile is created.
    d. For the purpose of this guide we will keep the default selection.
14. **When should we stop syncing this profile? (Required)**
    a. This will set the expiration date of the sync profile. You will typically want this date at the end of the term you are syncing. Once the date is reached, it will pause your profile.
    b. This date can be modified at any time after the profile is created.
    c. Click on the **calendar icon.**
    d. Select the number **30** to set the date to 09/30/2020.
15. Click on the **Next** button.

Teacher options

1. **Review teacher mapping**
   a. Ensure your CSV source field (**Username**, **Secondary Email**, or **Teacher Number**) is able to match to the users' existing accounts (**userPrincipalName**, **mail**, or **mailNickname**) in Microsoft 365 / Azure Active Directory.
   b. Adding on domain suffix is only required if your source data **does not contain** the domain for the user accounts.
   c. Click on the **down arrow** in the **domain field.**
   d. Select **M365EDU.contoso.com** as domain.
2. **Select teacher properties**

a. Any optional attributes detected in your files will automatically have them checked.
b. Click on the arrow for **school properties** to expand the selection.
c. For the purpose of this guide we will keep the default selection.
3. Click on the **Next** button.

Student options

1. **Review student mapping**
   a. Ensure your CSV source field (**Username**, **Secondary Email**, or **Student Number**) is able to match to the users' existing accounts (**userPrincipalName**, **mail**, or **mailNickname**) in Microsoft 365 / Azure Active Directory.
   b. Adding on domain suffix is only required if your source data **does not contain** the domain for the user accounts.
   c. Click on the **down arrow** in the **domain field.**
   d. Select **M365EDU.contoso.com** as domain.
2. **Select student properties**
   a. Any optional attributes detected in your files will automatically have them checked.
   b. Click on the arrow for **school properties** to expand the selection.
   c. For the purpose of this guide we will keep the default selection.
3. Click on the **Next** button.

Review

1. Please take time to review the options and properties you have selected for the sync profile.
2. Click on the **scroll bar** to scroll down.
3. If everything looks correct, click on **Create profile** to begin the sync.

Setting Up

Setting up the profile in the real-time environment can take a few minutes. After some time has passed, refresh the page to view the sync status of your profile. After refreshing, it will begin to process your data through several stages. The profile will not begin to match usernames to existing user accounts in your Microsoft 365. It if is not able to find a matching user account, it will not attempt to create the user.

For the purpose of this guide, wait for a couple of seconds until the sync status changes to **Sync is complete and ready for more data**.

Sync is complete and ready for more data

Once your profile has completed its sync, you are now ready to enable the **Security Group Sync**.

Enabling Security Group Sync

1. In the School Data Sync admin center in the left panel, click on **Settings**.
2. Click on the **scroll bar** to scroll down.
3. Click on the **toggle button** to **enable School Security Group Sync** and click **OK.**

a. Enabling this feature will create and manage three security groups for each school synced.
   i. School
   ii. Teachers of School
   iii. Students of School
4. Click on the **toggle button** to **enable All Teachers Security Group Sync** and click **OK.**
   a. Enabling this feature will create and manage an **All Teachers** security group.
5. Click on the **toggle button** to **enable All Students Security Group Sync** and click **OK.**
   a. Enabling this feature will create and manage an **All Students** security group.

Configure Settings for SDS Sync for API sync for Existing Users

In this task, we will review the requirements, API credentials, the configuration of your sync profile, and the enablement of security groups.

Prerequisites

- Microsoft 365 Education Tenant.
- Your Microsoft 365 user account has global administrator permissions.

SIS Configuration and API Credentials

It is important you have configured your SIS to allow API access, and you have the necessary API credentials to connect with School Data Sync. If you are unsure how to obtain your API credentials or if your SIS is properly configured, we recommend contacting your SIS provider's support team.

- Aeries
- Capita SIMS
- ClassLink
- eSchoolData
- Eventful
- Infinite Campus
- inLogic
- Skool
- PowerSchool
- Unified Classroom – PowerSchool
- VULCAN UONET+

You will need to provide the following API credentials:

- **Web Access URL**
- **Client ID**
- **Client Secret**

- **Token Endpoint URL** (not all providers will require this value)

Once you have ensured your SIS is configured for API access, and you have your API credentials, proceed with configuring your sync profile.

Accessing the School Data Sync admin center

1. Navigate to **https://sds.microsoft.com/Home/Dashboard** to log into your Microsoft 365 Education tenant with your Global Administrator account.
2. Sign in with the following credentials:
   a. Type **admin@contoso.com** and hit Enter
   b. Type **password** and hit Enter
   c. Click the **Yes** button to stay signed in

Add your sync profile

1. Click **Add Profile** to begin configuring your sync profile.
2. Enter **Contoso School District** as name for your profile.
3. Select the **Connect via an API** for your sync method.
4. Click on the **scroll bar** to scroll down.
5. Select **OneRoster API**
6. Click on the arrow icon next to **Choose your provider** to select a provider
7. Select **Other (OAuth 2)** from the list.
8. Click on **OK**.
9. Click on the **Start** button.

Configuring your sync profile for Existing Users

1. Select the **Existing users** option. This will cause your profile to match your source data to the users that already exist within your Microsoft 365 Education tenant.
2. **Provide your SIS API credentials**
   a. Type **Web Access URL** as:
      https://extapi.contoso.com/SubscriptionId/8354bd20fdd4946296876534ede49ff4/api/oneroster/v1p1
   b. Type **Client ID** as: **6ed56933-a901-786c-5d0e-f93d45cde891**
   c. Type **Client Secret** as: **Uaj0CV9eFg28XsTaF+dd+k0J/+cpXF2dvl7p0DDzlJ0=**
   d. Type **Token Endpoint URL** (not all providers will require this value) as:
      https://extapi.contoso.com/auth/oauth2/token
3. Click on **Test Connection**
   a. Once the connection test is successful, it will detect the buildings/schools in your SIS. Select the buildings/schools you wish to sync.
4. Click the **scroll bar** to scroll down.
5. Click on the drop-down arrow for **When does your school year end?** And select **2021** from the list.
6. Select any optional section or school properties you wish to sync. For the purpose of this guide, we will keep default selection. Click on the **scroll bar** to scroll down.

7. **Filter inactive entries**
   a. Enabling this option will prevent inactive records from being attempted to sync.
   b. For the purpose of this guide, we will keep default selection.
8. **Team Creation Option**
   a. Checking this box will create a M365 Group and Class Team for each section synced.
   b. Leaving this box unchecked will create the M365 Group only but allow the teacher to specify which of the M365 groups they want a Class Team for.
   c. For the purpose of this guide, we will keep default selection.
9. **Replace unsupported special characters**
   a. Checking this box will automatically replace [unsupported special characters](#) while syncing from the source.
   b. For the purpose of this guide, we will keep default selection.
10. **Sync option for section group display name**
    a. Checking this box will allow section names to be overwritten by teachers.
    b. Leaving the box unchecked allows the section name from the source files to overwrite any display name changes made by teachers.
    c. For the purpose of this guide, we will keep default selection.
11. **Delay student access**
    a. Enabling this option will put the enrollment of students on hold until the date you have selected.
    b. Disabling this option will enroll the students immediately into their classes.
    c. This date **cannot** be modified after the profile is created.
    d. For the purpose of this guide, we will keep default selection.
12. **When should we stop syncing this profile? (Required)**
    a. This will set the expiration date of the sync profile. You will typically want this date at the end of the term you are syncing. Once the date is reached, it will pause your profile.
    b. This date can be modified at any time after the profile is created.
    c. Click on the **calendar icon.**
    d. Select the number **30** to set the date to 09/30/2020.
13. Click on the **Next** button.

Teacher options

1. **Review teacher mapping**
   a. Ensure your SIS source field (**Username**, **Email**, or **Teacher Number**) is able to match to the users' existing accounts (**userPrincipalName**, **mail**, or **mailNickname**) in Microsoft 365 / Azure Active Directory.
   b. Adding on domain suffix is only required if your source data **does not contain** the domain for the user accounts.
   c. Click on the **down arrow** in the **domain field.**
   d. Select **M365EDU.contoso.com** as domain.
2. **Select teacher properties**
   a. Select any optional properties you wish to sync.
   b. For the purpose of this guide, we will keep default selection.
3. Click **Next**

Student options

1. **Review student mapping**
   a. Ensure your SIS source field (**Username**, **Email**, or **Student Number**) is able to match to the users' existing accounts (**userPrincipalName**, **mail**, or **mailNickname**) in Microsoft 365 / Azure Active Directory.
   b. Adding on domain suffix is only required if your source data **does not contain** the domain for the user accounts.
   c. Click on the **down arrow** in the **domain field.**
   d. Select **M365EDU.contoso.com** as domain.
2. **Select student properties**
   a. Select any optional properties you wish to sync.
   b. For the purpose of this guide, we will keep default selection.
3. **Click Next**

Review

1. Please take time to review the options and properties you have selected for the sync profile.
2. Click on the **scroll bar** to scroll down.
3. If everything looks correct, click on **Create profile** to begin the sync.

Setting Up

Setting up the profile in the real-time environment can take a few minutes. After some time has passed, refresh the page to view the sync status of your profile. After refreshing, it will begin to process your data through several stages. The profile will not begin to match usernames to existing user accounts in your Microsoft 365. It if is not able to find a matching user account, it will not attempt to create the user.

For the purpose of this guide, wait for a couple of seconds until the sync status changes to **Sync is complete and ready for more data**.

Sync is complete and ready for more data

Once your profile has completed its sync, you are now ready to enable the **Security Group Sync**.

Enabling Security Group Sync

1. In the School Data Sync admin center in the left panel, click on **Settings**.
2. Click on the **scroll bar** to scroll down.
3. Click on the **toggle button** to **Enable School Security Group Sync** and click on **OK.**
   a. Enabling this feature will create and manage three security groups for each school synced.
      i. School
      ii. Teachers of School
      iii. Students of School
4. Click on the **toggle button** to **Enable All Teachers Security Group Sync** and click on **OK.**
   a. Enabling this feature will create and manage an **All Teachers** security group.

5. Click on the **toggle button** to **Enable All Students Security Group Sync** and click on **OK.**
   a. Enabling this feature will create and manage an **All Students** security group.