

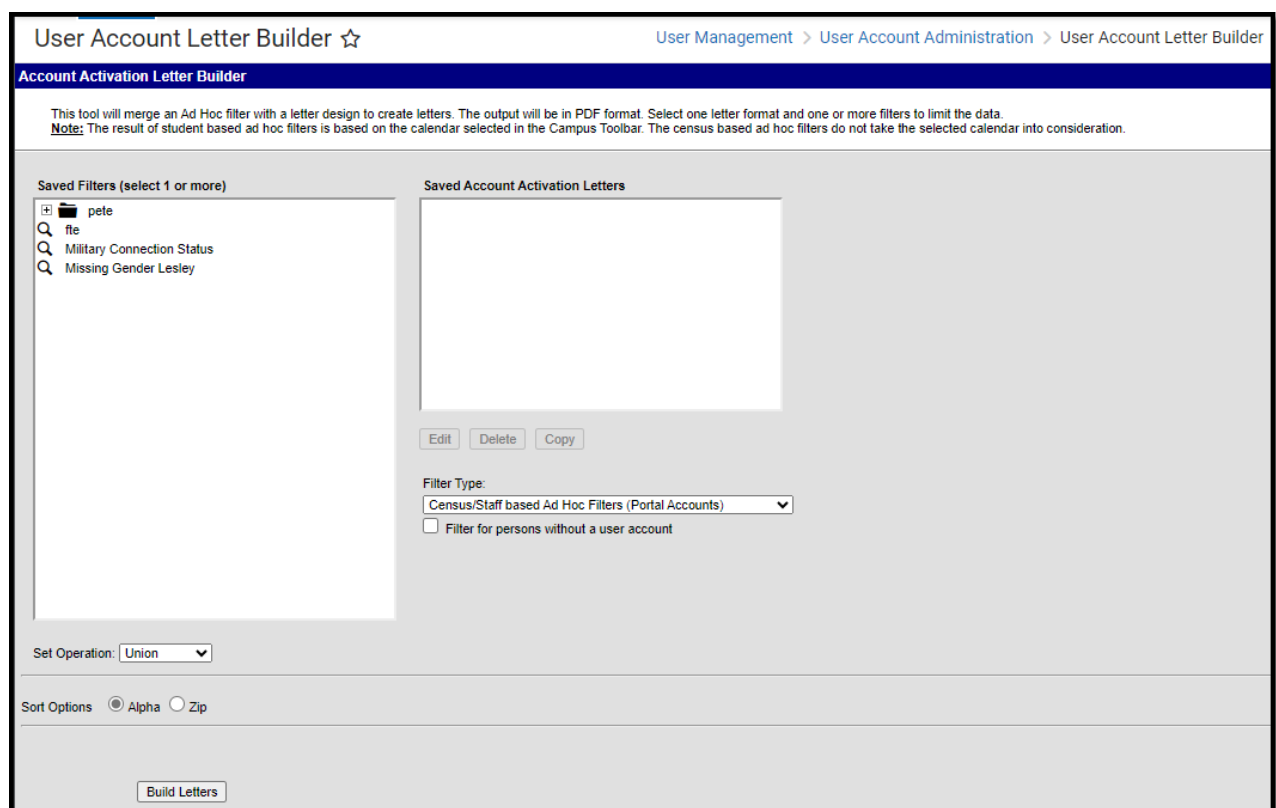
# User Account Letter Builder

Last Modified on 12/14/2025 8:45 pm CST

Tool Search: User Account Letter Builder

The User Account Activation Letter Builder allows you to generate user account-based letters for specific Campus users based on filter criteria.

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The screenshot shows the 'User Account Letter Builder' interface. At the top, there's a breadcrumb trail: 'User Management > User Account Administration > User Account Letter Builder'. Below this is a header 'Account Activation Letter Builder'. A note states: 'This tool will merge an Ad Hoc filter with a letter design to create letters. The output will be in PDF format. Select one letter format and one or more filters to limit the data. Note: The result of student based ad hoc filters is based on the calendar selected in the Campus Toolbar. The census based ad hoc filters do not take the selected calendar into consideration.'

The main area is divided into two columns. The left column, 'Saved Filters (select 1 or more)', contains a list of filters: 'pete', 'fte', 'Military Connection Status', and 'Missing Gender Lesley'. The right column, 'Saved Account Activation Letters', is empty. Below the filters list are buttons for 'Edit', 'Delete', and 'Copy'. A 'Filter Type' dropdown menu is set to 'Census/Staff based Ad Hoc Filters (Portal Accounts)', and there is a checkbox for 'Filter for persons without a user account' which is currently unchecked.

At the bottom, there's a 'Set Operation' dropdown set to 'Union', 'Sort Options' with radio buttons for 'Alpha' (selected) and 'Zip', and a 'Build Letters' button.

Image 1: Account Letter Builder Editor

## Prerequisites

- Filters need to be created within [Filter Designer](#).
- Account letter formats need to be created within the [Account Letter Designer](#).
- If sending Campus account activation letters using an import file Ad hoc filter, a file must first be imported via the [User Account Batch Import Tool](#).

## Building an Account Letter

This tool is calendar-sensitive. Please select a calendar before using it, or you will receive an error message.

In order for an account letter to be generated, a person must have at least one relationship established in their household.

1. Select which **Saved Filter(s)** to include within the letter.
2. Select which **Saved Account Activation Letter** format will be used to build the letter.

This field is populated by letter formats created in the [Account Letter Designer](#) tool.

3. Select the **Filter Type**.
  1. **Census/Staff based Ad Hoc Filters (Portal Accounts)** - Filters saved filters to only those containing census/staff fields. When building a letter, only active staff members with a Homepage = 'Campus Portal' (System Administration > User Security > Users > User Account > Homepage) will have a letter generated.
  2. **Census/Staff based Ad Hoc Filters (Staff Accounts)** - Filters saved filters to only those containing census/staff fields. When building a letter, only active staff members with a Homepage = 'Campus Instruction' OR 'Campus Application' (System Administration > User Security > Users > User Account > Homepage) will have a letter generated.
  3. **Student based Ad Hoc Filters** - Filters saved filters to only those containing student fields.
  4. **Guardians of Student based Ad Hoc Filters** - Filters saved filters to only those containing guardian fields.
4. Mark the **Filter for persons without a user account** checkbox to limit letter recipients to persons without a Campus user account.
5. If more than one Saved Filter is selected, determine how the letter will filter data by selecting the **Set Operation**. For more information about this field, see the [Filter Operations](#) section below.
6. Select the **Sort Option**.
7. Click the **Build Letters** button. The letter will appear in a separate window in PDF format.

The following table describes each field and its functionality:

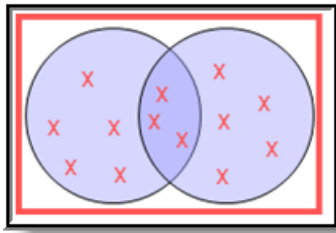
Field	Description
<b>Saved Filters</b>	This field contains all Ad hoc filters created within the <a href="#">Filter Designer</a> . You can select more than one filter to use when generating letters.

Field	Description
<b>Saved Account Activation Letters</b>	This field contains all Ad hoc letters created within the <a href="#">Account Letter Designer</a> .
<b>Filter Type</b>	<ul style="list-style-type: none"> <li>• Census/Staff based Ad Hoc Filters (Portal Accounts) - Only active staff members with a Homepage = 'Campus Portal' (System Administration &gt; User Security &gt; Users &gt; User Account &gt; Homepage) will have a letter generated.</li> <li>• Census/Staff based Ad Hoc Filters (Staff Accounts) - Only active staff members with a Homepage = 'Campus Instruction' OR 'Campus Application' (System Administration &gt; User Security &gt; Users &gt; User Account &gt; Homepage) will have a letter generated.</li> <li>• Student based Ad Hoc Filters - Only students will have a letter generated.</li> <li>• Guardians of Student based Ad Hoc Filters - Only users established as guardians of active students will have a letter generated.</li> </ul>
<b>Filter for persons without a user account</b>	When marked, only people identified by the selected Ad hoc filter(s) who do not currently have a Campus user account will generate a letter.
<b>Set Operation</b>	If multiple filters are selected, this field determines how Campus combines the filters when reporting data. See the <a href="#">Filter Operations</a> section below for more information.
<b>Sort Options</b>	Sort options are defined as follows: <ul style="list-style-type: none"> <li>• <b>Alpha</b> - Data is sorted alphabetically by recipient last names.</li> <li>• <b>Zip</b> - Data is sorted by address zip code (used for bulk mail rates).</li> </ul>
<b>Account Activation URL Expiration Date</b>	<p>This date determines when the Unique Link Activation URL indicated in the letter expires. If the Unique Link Expiration Date field is included in the letter, it will report the date entered in this field. If this date is not modified, it defaults to 48 hours after generating the letter.</p> <p>This field only appears if the Saved Account Activation Letter selected includes the <b>accountManagement.uniqueLinkActivationURL</b> and <b>accountManagement.uniqueLinkExpirationDate</b> fields.</p>
<b>Build Letter</b>	Initiates generation of the letter.

## Filter Operations

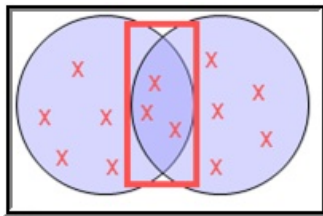
When two or more Saved Filters (Ad hoc filters) are selected on the Account Letter Builder editor, users must determine how Campus will combine these filters when reporting data. Users must select one of two Set Operations:

**Union Operation** - This operation combines two or more filters by appending one to the other. An example of this would be all Baseball Team members and all 10th grade male students. The following diagram explains this union:



*Image 2: Union Operation*

**Intersection Operation** - This operation is used to find data that one or more filters have in common. An example of this would be all baseball team members who are also 10th grade male students. The following diagram explains this union.



*Image 3: Intersection Operation*

## Account Letter Builder Examples/Scenarios

The following are examples of useful ways to use the Account Letter Builder.

- [Build Activation Letters for Newly Imported/Created Campus Portal Accounts](#)
- [Remind Staff their Campus Portal Account is About to Expire](#)

### Build Activation Letters for Newly Imported/Created Campus Portal Accounts

Once user accounts are imported and created via the [User Account Batch Import Tool](#), a filter is automatically created within Campus. This allows users to easily send letters and/or emails to these users, informing them of their new account and asking them to activate the account.

#### Step 1. Design an Activation Letter

The first step in this scenario is to design an activation letter within the [Account Letter Designer](#). This letter should include the following:

- The **accountManagement.username** field.
- The **accountManagement.uniqueLinkActivationURL** field.

- The **accountManagement.uniqueLinkExpirationDate** field.
- A line about what the person should do if they fail to activate their account before the URL expiration date.

For example, in the image below (Image 4), a letter was built including these items, and an example of how this letter will look once generated is shown.

**Account Letter Designer**

This wizard will walk you through the creation of a new letter format intended for User Security notifications.

\*Name  
JMM Username and Link Letter

Format

Hello ; individual.firstName

Your new username is: accountManagement.username

Your URL link is: accountManagement.uniqueLinkActivationURL

Please log on by: accountManagement.uniqueLinkExpirationDate

Thank you for using the Infinite Campus portal!

Your Campus Administrator

Organized To:  
User Account ▼

Save Format

Dylan  
Crystal, MN 55427-1553

Hello Dylan

Your new username is: Dabboud

Your URL link is: http:// unique-link/T0WvagwpX5W8tCj?appName=SIS-55898iemn

Please logon by 09/04/2014

Thank you for using the Infinite Campus portal!

You local administrator

Image 4: Example of Activation Letter

## Step 2. Build Activation Letters Using the Import Ad Hoc Filter

The next step is to build letters using the Ad hoc filter created when accounts were imported via the [User Account Batch Import Tool](#) and the letter format created in Step 1. The filter will contain all users who had accounts generated via the import.

Filters created via an import are saved as UAM - the date and time the import was generated - the file name. For example, UAM-2014-08-13-12-35-23-file20.csv (see Image 5).

Upon import of a file, the Import Results Summary will list the newly created Ad hoc filter (see below).

### User Account Batch Import Results:

1 new user accounts inserted.

Ad Hoc Filter "UAM-2014-09-05-10-24-36-staff-file.csv" created.

1 Total Valid records.

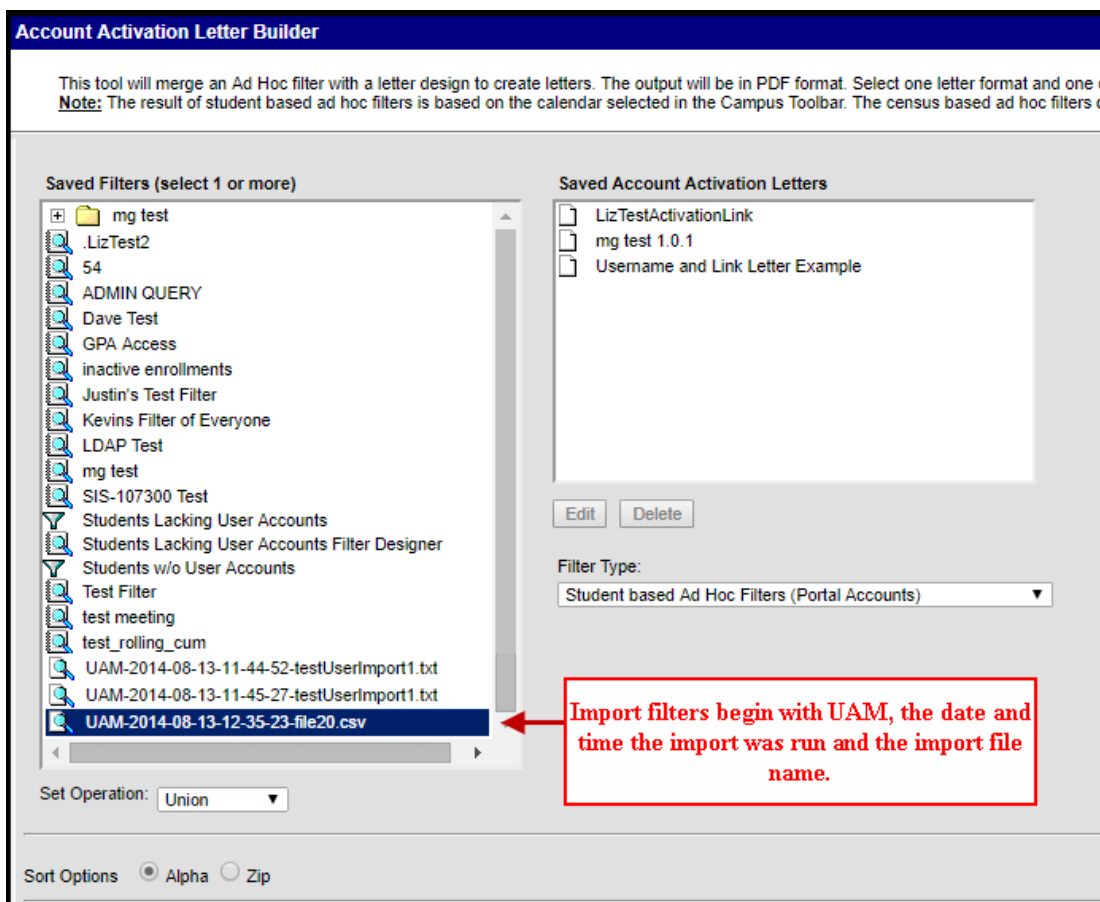


Image 5: Building Letters for the Import Filter and Activation Letter Format

1. Select the import filter within the **Saved Filters** window (see image above).
2. Locate and select the activation letter created in Step 1 within the **Saved Account Activation Letters** window.
3. Select the **Filter Type**. This determines whether the letter will be built for students, staff, or guardians.
4. Click the **Build Letters** button. The letter will appear in a separate window and is ready for printing and/or sending to users.

## Remind Staff their Campus Portal Account is About to Expire

Another useful scenario is generating a letter for all staff whose Campus Portal accounts are about to expire.

In the example below, an Ad hoc filter was created finding active staff members with user accounts about to expire and a letter was created containing the username and account expiration date (Image 6).

### Ad Hoc Query Wizard - Field Selection

Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the field(s) from the Selected Fields window, select the field(s) and click the back arrow <--. The output will sequence the fields in the order selected; at least one field must be selected to continue.

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

\*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By  Search Clear

All Fields

- Person
  - Demographics
  - Census
  - Staff
  - Meetings
  - FRAM
  - Point-of-Sale
  - Campus Learning
  - Campus Usage
  - Custom Tab: Custom People

Selected Fields

- individual.personID
- individual.personGUID
- individual.lastName
- individual.firstName
- pcontact.email
- usage.username
- usage.forceChangePassword
- contacts.guardian
- contacts.portal
- usage.expiresDate
- employment.active
- schoolEmployment.active

### Account Letter Designer

This wizard will walk you through the creation of a new letter format intended for User Security notifications.

\*Name

Format

B I U 
 







 
 A F

Hello, this is a friendly reminder that your Campus Portal account will expire on the date indicated below.

Username:

Date Portal Account will Expire:

Please contact the district if you have any questions.

Organized To:

Save Format



Image 6: Creating User Account Expiring Filter and Letter

Once the filter and letter have been created, select a **Filter Type** of 'Census/Staff based Ad Hoc Filters (Portal Accounts)', locate these within the Account Letter Builder, and generate letters by selecting the Build Letters button (Image 7).

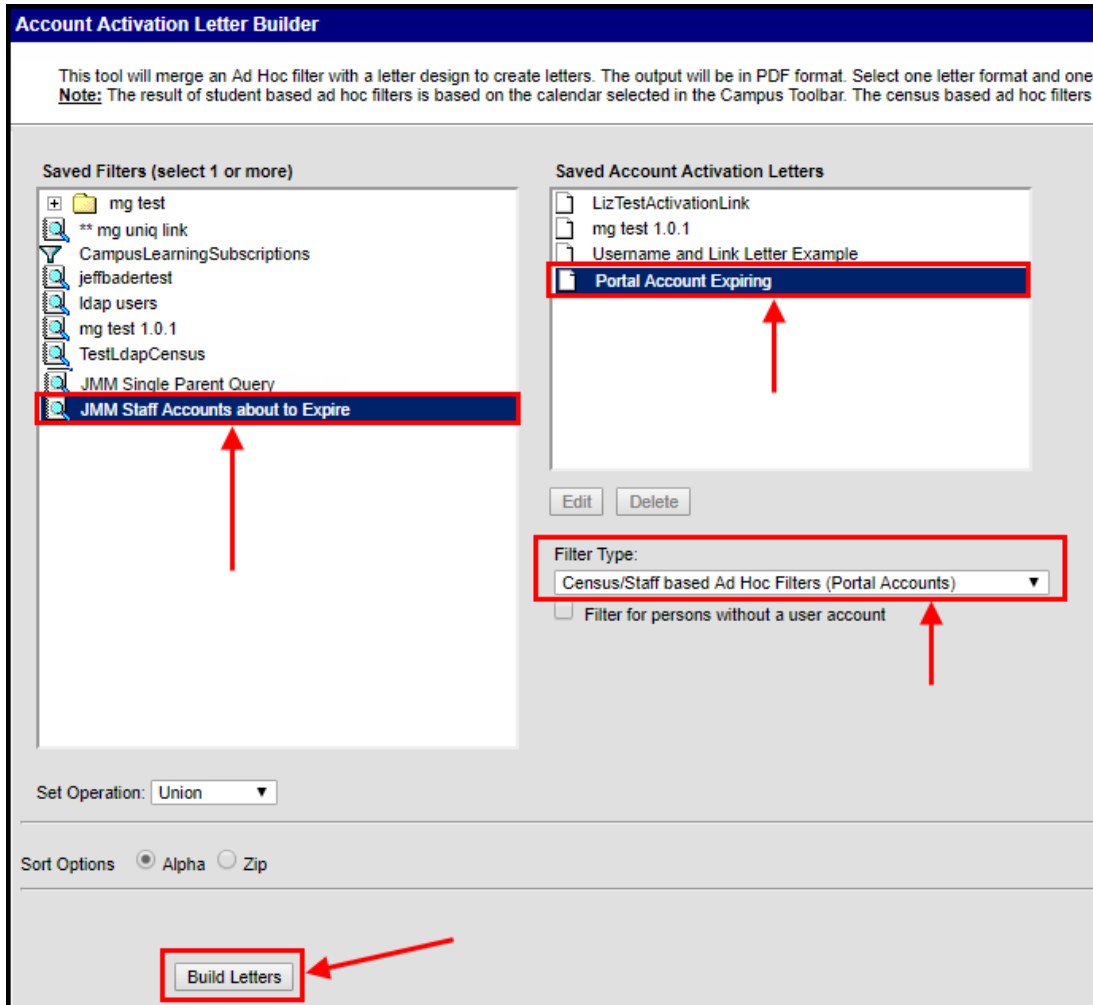


Image 7: Generating Expiring Account Letters

## Informing Users of Newly Created User Accounts

You can inform all users who have a newly created user account or who have never logged into their user account to log into their account and update their account password. This scenario is especially useful for user accounts created automatically via [Account Security Preferences](#).

In the example below, an Ad hoc filter was created which includes the total login count (usage.totalLoginCount) and if the account is flagged to require a password change (usage.forceChangePassword). These fields are important as they can be combined with Filter Parameters to identify only users with a Campus user account who have never logged into their account and need to change their password (which will be the case for any accounts auto-generated via Account Security Preferences).

Use the following values to ensure a proper list is generated (see Image 8):

- **usage.totalLoginCount**
  - Operator: =
  - Value: 0
- **usage.forceChangePassword**
  - Operator: =TRUE

**Ad Hoc Query Wizard - Field Selection**

Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the Add Function option to add the field to the Selected Fields window. To remove a field from the Selected Fields window, select the field(s) and click the back arrow <--. The output will sequence the fields in the order selected; however, the sequence can be changed on the Output Formatting screen. At least one field must be selected to continue.

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

\*Query Name:

Short Description:

Long Description:

Select categories & fields

Filter By

All Fields

- + Student
  - + Demographics
  - + School Boundaries
  - + School Calendar
  - + School
  - + District
  - + Learner
  - + Counselor

Selected Fields

- usage.totalLoginCount
- usage.forceChangePassword
- student.firstName
- student.lastName
- usage.username

**Ad Hoc Query Wizard - Filter Parameters**

Parameters are used to filter data based on specific logic. Use the operators to apply logic to designated fields. Logic not being output. Click the Add Field button to apply additional logic criteria to a single field already assigned an Operator Expression (optional) to set conditions for the operators using AND, OR, and NOT conditions. If a Logical Expression will be applied to all operators. If using Logical Expression, include all fields that have Operators or the Operator for the

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

\*Query Name:

Short Description:

Long Description:

Filter the data

ID	*Field	Operator	Value
1	usage.totalLoginCount	=	0
2	usage.forceChangePassword	= TRUE	
3	student.firstName		
4	student.lastName		
5	usage.username		

Image 8: Filter of Users Who Need to Log into their User Account

Once this filter is created, use the Account Letter Designer to design a letter which will generate for

each one of these users.

This letter should include the following Campus fields (see Image 9):

- The **accountManagement.username** field.
- The **accountManagement.uniqueLinkActivationURL** field.
- The **accountManagement.uniqueLinkExpirationDate** field.

**Account Letter Designer**

This wizard will walk you through the creation of a new letter format intended for User Security notifications.

**\*Name**  
User Account Notification

**Format**

You now have a Campus user account! The following are your login credentials:

Username: `accountManagement.uniqueLinkUsername`

Please go to: `accountManagement.uniqueLinkActivationURL`. This will require you setup a new account password.

You have until `accountManagement.uniqueLinkExpirationDate` to complete this process.

Thank you.

**Organized To:**  
User Account

Save Format

Image 9: Building a Letter to Inform Users who Need to Log Into Their Account

Once the filter has been created and the account activation letter has been build:

1. Select the **Filter Type**.

Filter criteria is important when generating this letter. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Portal Accounts), etc) will have a letter generated.

**For notifying Staff, please consider the following:**

- If notifying staff of their newly created staff Portal accounts (System Administration > User Security > Users > User Account > Homepage = Campus Portal), use the **Census/Staff based Ad Hoc Filters (Portal Accounts)** filter option.
- If notifying staff of their newly created Campus Application accounts (System Administration > User Security > Users > User Account > Homepage = Campus Instruction OR Campus Application), use the **Census/Staff based Ad Hoc Filters (Staff Accounts)** filter option.

2. Select the filter from the **Saved Filters** window.
3. Select the letter from the **Saved Account Activation Letters** window.
4. Enter an **Account Activation URL Expiration Date**. This is the date the unique activation URL contained in the message will expire (see Image 10). Users will need to select this URL prior to this date.
5. Click the **Build Letters** button. The letters will appear in a separate window.

**Account Activation Letter Builder**

This tool will merge an Ad Hoc filter with a letter design to create letters. The output will be in PDF format. Select one letter format and one or more filters.  
**Note:** The result of student based ad hoc filters is based on the calendar selected in the Campus Toolbar. The census based ad hoc filters do not take the

**Saved Filters (select 1 or more)**

- Anna's Queries
- Course Reports
- Course Requests - By Hallman
- Hallman Go Live Filters
- Scheduling
- \*\*\*ADM/A
- \*\*\*ADM\_ADA
- \*\*\*deCruz
- \*\*\*EndStatus001
- \*\*\*grade3x
- \*\*\*SDeVries
- AKR
- Emph/Stu
- Users with a New User Account**

**Saved Account Activation Letters**

- User Account Notification**
- \*\*\*\*\*STATE AD HOC TEMPLATES\*\*\*\*\*

Edit Delete

Filter Type:  
Student based Ad Hoc Filters

\*Account Activation URL Expiration Date: 06/09/2017

Set Operation: Union

Sort Options ☒ Alpha ☐ Zip

Build Letters

Image 10: Generating a Letter

Below is an example of a generated letter using this scenario (Image 11).

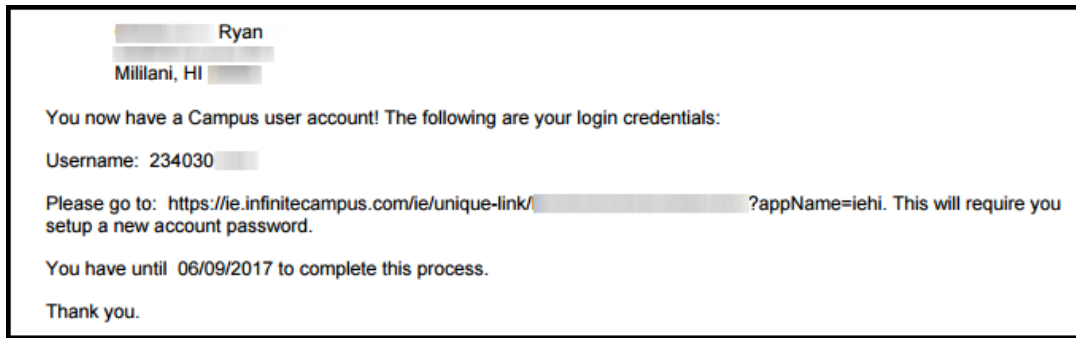


Image 11: Example of a Letter