Calendar Rights User Groups - Study Guide

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Calendar Rights determine what school, year and calendar access is provided to all users within a user group.

Calendar rights work in tandem with Tool Rights, where Tool Rights determine which tools user group members can access and Calendar Rights determine which calendars user group members are allowed to view and modify via Campus tools.

- User Groups
    - Create Calendar Rights User Groups
    - Assign Calendar Rights to a User Group
    - Assign User Groups to Individual Staff Members
    - Assign Calendar User groups to All Staff Members
- Disabling Student and Staff Accounts
    - Disable User Accounts for All Students or Staff in a Selected Calendar(s)
    - Disable User Accounts for All Selected Students or Staff
- Forcing a Password Change
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- Adding User Groups to Staff Accounts
    - Add User Groups for All Staff in a Selected School(s)
    - Add User Groups for Specific Staff Members
- Removing User Groups to Staff Accounts
    - Remove User Groups for All Staff in a Selected School(s)
    - Remove User Groups for Specific Staff Members
- Informing Users of Newly Created User Accounts
    - Creating an Email Message to Inform Users of Their New User Account
    - Establishing a Recurring User Account Activation Message
    - Creating Letters to Inform Users of Newly Created User Accounts

User Groups

Create Calendar Rights User Groups

The first step in assigning calendar rights for staff members is to create a user group(s). A user group is a way to define a specific set of tool and/or calendar rights and apply these rights to all users assigned to the group.

+ **Documentation**

Assign Calendar Rights to a User Group

Once user groups are established, calendar rights can be assigned. Calendar Rights determine what school, year and calendar access is provided to all users within the user group.

+ **Documentation**

Assign User Groups to Individual Staff Members

Once calendar user groups have been created, individual staff members can then be assigned to the user group(s).

+ **Documentation**

## Assign Calendar User groups to All Staff Members

You can also assign calendar user groups to staff members en masse using the User Account Batch Wizard.

+ **Documentation**

Disabling Student and Staff Accounts

The Disable Account option allows you to disable user accounts for all students or staff within a calendar(s) or for a specific set of users. See the following sections below for more information.

- Disable User Accounts for All Students or Staff in a Selected Calendar(s)
- Disable User Accounts for All Selected Students or Staff

Image 19: Disable Account Option

Disable User Accounts for All Students or Staff in a Selected Calendar(s)

To disable all user accounts for all students or staff within a selected calendar(s):

1. Select an **Account Type**
   - **Students** - Select this option to disable all students within a selected calendar(s).
   - **Staff** - Select this option to disable all staff within a selected calendar(s).
2. Select a **Change Type** of 'Disable Account'.
3. Mark the **Disable user accounts for all students in the selected calendar(s)** OR **Disable user accounts for all staff in the selected calendar(s)** radio button.
4. Select which calendar(s) will have user accounts disabled. To select multiple calendar, hold the CTRL button while selecting each calendar.
5. To preview a list of all user accounts that will be disabled, click the **Preview Changes** button. A report will appear in CSV format.
6. To initiate the disabling of student or staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts disabled.

	Student Accounts	Staff Accounts

User Account Batch Wizard

This tool can be used to batch create, enable or disable student and staff accounts, or flag them for password change. Account update.

1. Account Type [Students ∨]
2. Change Type [Disable Account   ∨]
3. Additional Account Information

◉ Disable user accounts for all active students in the selected calendar(s)

2021-22 2/3 Day Preschool - NH
2021-22 2/3 Day Preschool - ZL
2021-22 5 Day Preschool - NHLC
2021-22 Adult Academic Program
2021-22 C & T OUT (Non Rpt)
2021-22 Cooper Credit Recovery
2021-22 Early Adventures - Nei
2021-22 Early Adventures- PLE
2021-22 Early Childhood (ECSE)
2021-22 ECFE - FLT (Non Rpt)
2021-22 ECFE NHLC (Non Rpt)
2021-22 ECFE NHLC Preschool
2021-22 FAIR School - Crystal
2021-22 FAIR School Pilgrim La
2021-22 Forest Elementary
2021-22 Highview Alternative P

*Ctrl-click or Shift-click to select multiple

○ Disable user accounts for all selected students

[Preview Changes] [Save Changes]

User Account Batch Wizard

This tool can be used to batch create, enable or disable student and staff accounts, or flag them for password change. Account update.

1. Account Type [Staff   ∨]
2. Change Type [Disable Account   ∨]
3. Additional Account Information

◉ Disable user accounts for all staff in the selected school(s)

2/3 Day Preschool - NHLC (Non Rpt)
2/3 Day Preschool - ZLE (Non Rpt)
5 Day Preschool - NHLC (Non Rpt)
Adult Academic Program
Armstrong Credit Recovery
C & T OUT (Non Rpt)
Cooper Credit Recovery
Crystal Learning Center (Non Rpt)
Early Adventures - Neill
Early Adventures- PLE
Early Childhood (ECSE)
ECFE - EPA (Non Rpt)
ECFE - FLT (Non Rpt)
ECFE NHLC (Non Rpt)
ESC (Non Rpt)
FAIR School - Crystal

*Ctrl-click or Shift-click to select multiple

○ Disable user accounts for all selected staff

[Preview Changes] [Save Changes]

Disable User Accounts for All Selected Students or Staff

To disable user accounts for a specific student or set of students:

1. Select an **Account Type**
   - **Students** - Select this option to disable specific students within a selected calendar(s).
   - **Staff** - Select this option to disable specific staff within a selected calendar(s).
2. Select a **Change Type** of 'Enable Account'.
3. Mark the **Disable user accounts for selected students** OR **Disable user accounts for all selected staff** radio button.
4. Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

   > Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each person who will have their user account disabled. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.
6. To preview a list of all user accounts that will be disabled, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the disabling of student or staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts disabled.

Student Accounts	Staff Accounts

Below is an example of the CSV report that will generate once the **Save Changes** button is selected (Image 20).

Image 20: Example of the CSV Report Detailing Disabled Accounts

Forcing a Password Change

The Force Password Change option allows you to force a password change for all student or staff user accounts in a school(s) or for a specific set students or staff.

> Only students with a student user account which is enabled and does not already have the Force Password Change field selected will be forced to change their password.

See the following sections below for more information.

- Force a Password Change for All Students or Staff in a Selected School(s)
- Force a Password Change for All Selected Students or Staff
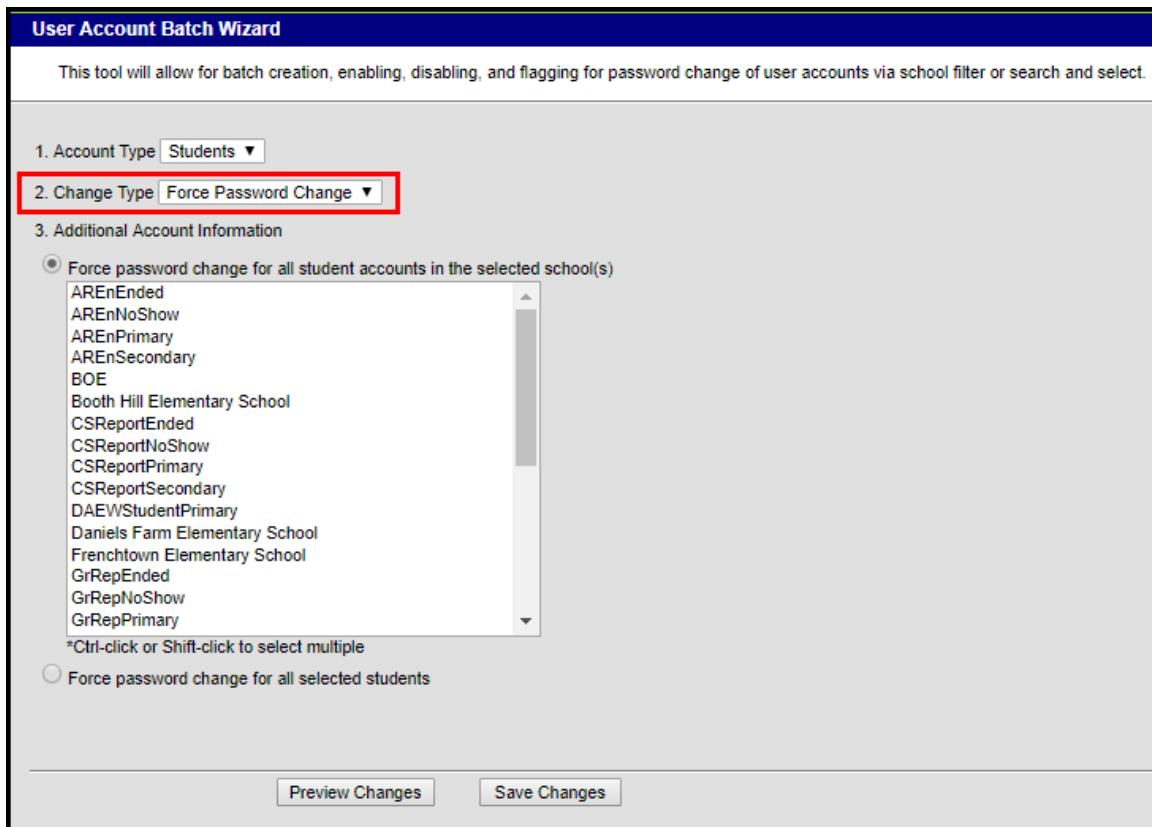
Image 21: Force Password Change Option

Force a Password Change for All Students or Staff in a Selected School(s)

To force a password change for all student or staff accounts in a selected school(s):

1. Select an **Account Type**
   - **Student** - Selecting this option means all students within the selected school(s) will be forced to change their password.

   - **Staff** - Selecting this option means all staff within the selected school(s) will be forced to change their password. Staff are identified based on the presence of a District Assignment record.

     > When forcing a password change for staff, the tool omits staff members with the following Product Security Roles: Application Security, Finance, Human Resources, Open Market Food Service, Payroll, Student Information System, Campus Learning.

2. Select a **Change Type** of 'Force Password Change'.
3. Mark the **Force password change for all student accounts in the selected school(s)** OR **Force password change for all staff accounts in the selected school(s)** radio button.
4. Select which schools will have all student or staff accounts forced to change their password.

5. To preview a list of all user accounts that will be impacted, click the **Preview Changes** button. A report will appear in CSV format.
6. To initiate the forcing of a password change for student or staff user accounts in the selected school(s), click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts impacted.

> Only students with an active user account, an active or future enrollment record in the selected school(s), and does not already have the Force Password Change field selected will be required to change their user account password.
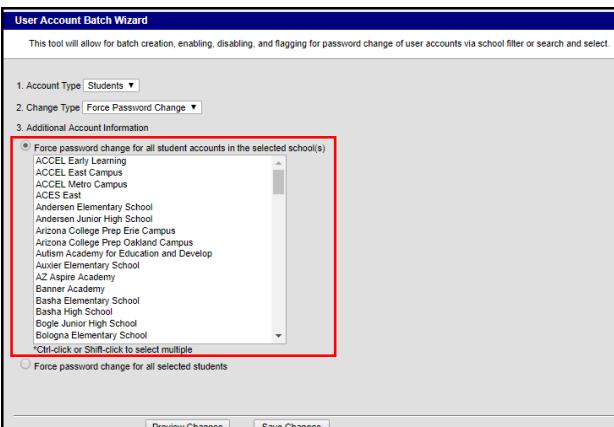
Student Accounts	Staff Accounts
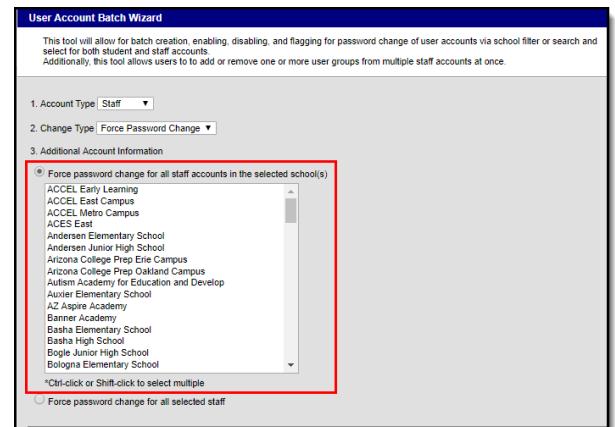
Force a Password Change for All Selected Students or Staff

To force a password change for specific students or staff:

1. Select an **Account Type**.
    1. **Student** - Select this option to force a password change for specific students.

    2. **Staff** - Select this option to force a password change for specific staff. Logic identifies staff members by looking for user accounts set with a Homepage of 'Campus Application' and then excluding some users based on their user group/product security roles.

    > When forcing a password change for staff, the tool omits staff members with the following Product Security Roles: Application Security, Finance, Human Resources, Open Market Food Service, Payroll, Student Information System, Campus Learning.

2. Select a **Change Type** of 'Force Password Change'.
3. Mark the **Force password change for all selected students** or **Force password change for all selected staff** radio button.

4. Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

> Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each person who will be forced to change their password. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.
6. To preview a list of all user accounts that will be impacted, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the forcing of a password change for all selected students or staff, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts impacted.

> Only selected students with an active user account, an active or future enrollment record in the selected school(s), and does not already have the Force Password Change field selected will be required to change their user account password.

Student Accounts	Staff Accounts

Below is an example of the CSV report that will generate once the Save Changes button is selected (Image 20).

User Account Batch Wizard Report			
Generated on 09/26/2017 03:34:45 PM			
Account Type: students			
Change Type: forcePasswordChange			
Total number of accounts: 4			
LastName	FirstName	MiddleName	Username
	John	Tester	John555
	John	Tester	John888
	John	Tester	John444
	John	Tester	John777

Image 22: Example of the CSV Report Detailing User Accounts Forced to Change Their Password

Adding User Groups to Staff Accounts

User Groups can be assigned to all staff user accounts within a school or for a specific set of staff members. This functionality is useful in mass applying calendar rights and tool rights for all staff members in a school or for a specific set of staff members (e.g., all teachers, specific counselors, etc).

User Groups are broken into the three following categories:

- **Tool Rights Groups** - These groups only contain tool rights and do not assign calendar rights.
- **Calendar Group** - These groups only contain calendar rights and do not assign tool rights.
- **Mixed or Empty Group** - These groups assign a combination of tool and calendar rights or they are blank and contain no calendar or tool rights at the moment.

By separating user groups into these categories, users have more control over what types of rights are assigned and can easily identify and sort through different user groups when assigning.

User groups containing all schools and all calendars cannot be added to staff accounts via the User Account Batch Wizard. User accounts requiring all schools/all calendars must be handled manually.

See the following sections below for more information.

- Add User Groups for All Staff in a Selected School(s)
- Add User Groups for Specific Staff Members

Image 23: Add User Groups Option

Add User Groups for All Staff in a Selected School(s)

To add user groups for all staff within a selected school(s):

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Add User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be assigned to these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be

added.

8. Select the **Add User Groups to all staff in the selected school(s)** radio button.
9. Select which school(s) will have selected user groups assigned to all staff members. To select multiple schools, hold the CTRL button while selecting each school.
10. To preview a list of all user accounts and what user groups will be added, click the **Preview Changes** button. A report will appear in CSV format.
11. Select the **Save Changes** button. Specified User Groups have now been added to all staff members in the selected schools.
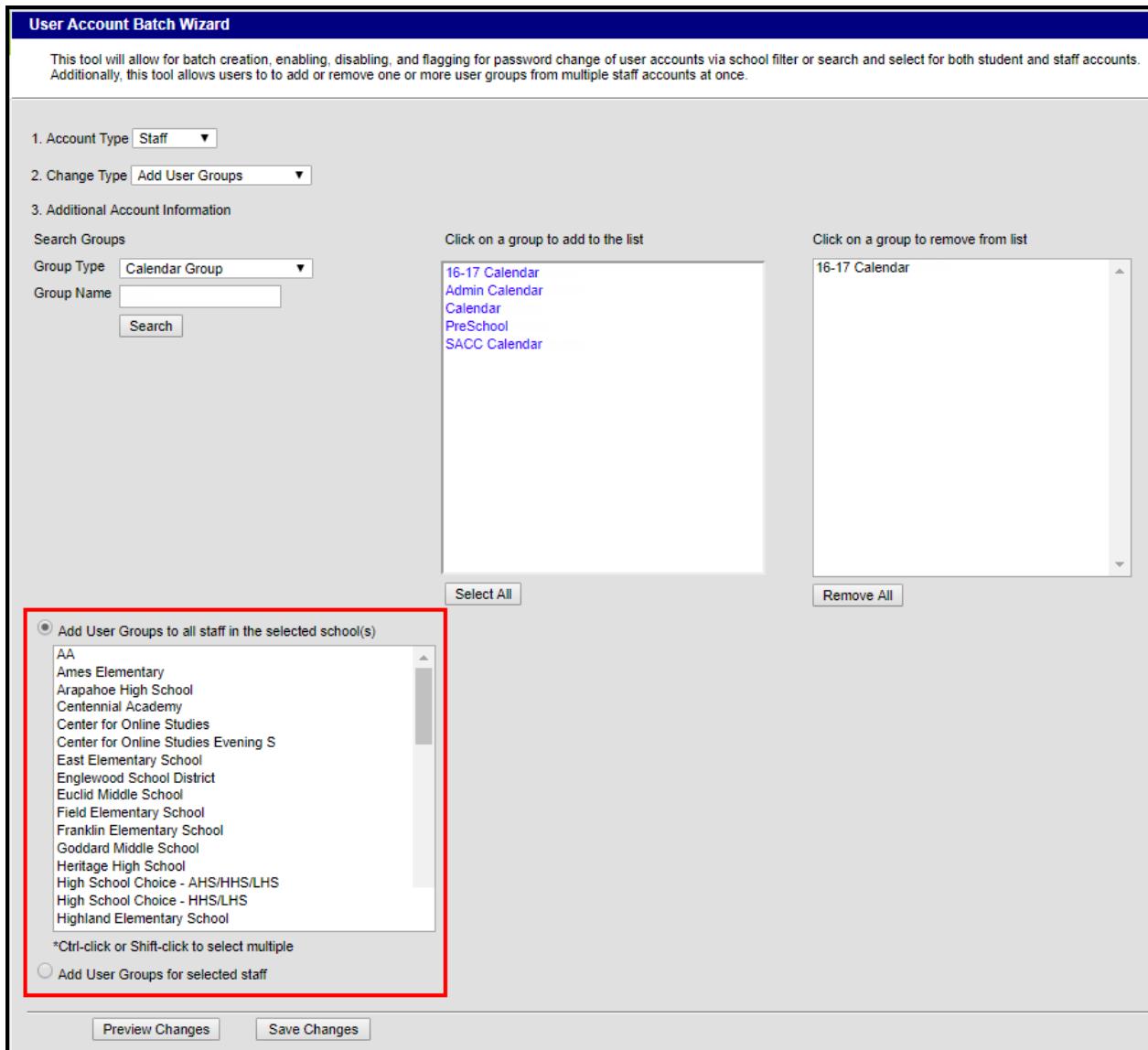
Image 24: Adding User Groups for All Staff in a School(s)

Add User Groups for Specific Staff Members

To add user groups for specific staff members:

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Add User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will

appear in search results.

4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.

5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.

6. Select which groups will be assigned to these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.

7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be added.

8. Select the **Add User Groups for selected staff** radio button.

9. Search for a person by entering identifying criteria (e.g., Last Name, First Name, Gender, Title, etc) and click the **Search** button. Search results will appear in the window to the right.

Search results are district-wide.

10. Select which users will have user groups added by click on their name in the **Select a person to add to edit list** window. Once a person is selected they will appear in the **Click on a person to remove from list** window.

11. To preview a list of what user groups will be added for which people, click the **Preview Changes** button. A report will appear in CSV format.

12. Once ready initiate the addition of the user groups, select the **Save Changes** button. Specified User Groups have now been added to the selected users.

Image 25: Adding User Groups for Specific Staff Members

Below is an example of the report that is produced once user groups are added.

User Account Batch Wizard Report				
Generated on 10/26/2017 02:34:39 PM				
Account Type: staff				
Change Type: addGroups				
LastName	FirstName	MiddleName	UserName	GroupName
Johnson	Carole		CMJohnson	16-17 Calendar
Johnson	Carole		CMJohnson	Admin Calendar
Johnson	Carole		CMJohnson	Calendar
Johnson	Carole		CMJohnson	PreSchool
Johnson	Carole		CMJohnson	SACC Calendar
Johnson	Carolyn		CFJohnson	16-17 Calendar
Johnson	Carolyn		CFJohnson	Admin Calendar
Johnson	Carolyn		CFJohnson	Calendar
Johnson	Carolyn		CFJohnson	PreSchool
Johnson	Carolyn		CFJohnson	SACC Calendar

Image 26: Example of the User Group Report

Removing User Groups to Staff Accounts

User Groups can also be removed from all staff user accounts within a school or for a specific set of staff members. This functionality is useful in mass removing calendar rights and tool rights for all staff members in a school or for a specific set of staff members (e.g., all teachers, specific counselors, etc).

See the following sections below for more information.

- Remove User Groups for All Staff in a Selected School(s)
- Remove User Groups for Specific Staff Members

Image 27: Remove User Groups Option

Remove User Groups for All Staff in a Selected School(s)

To remove user groups for all staff within a selected school(s):

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Remove User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be removed from these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be added for removal.
8. Select the **Remove User Groups to all staff in the selected school(s)** radio button.
9. Select which school(s) will have selected user groups removed for all staff members. To select multiple schools, hold the CTRL button while selecting each school.
10. To preview a list of all user accounts that will have user groups removed, click the **Preview Changes** button. A report will appear in CSV format.
11. Select the **Save Changes** button. Specified User Groups have now been removed to all staff members in the selected schools.
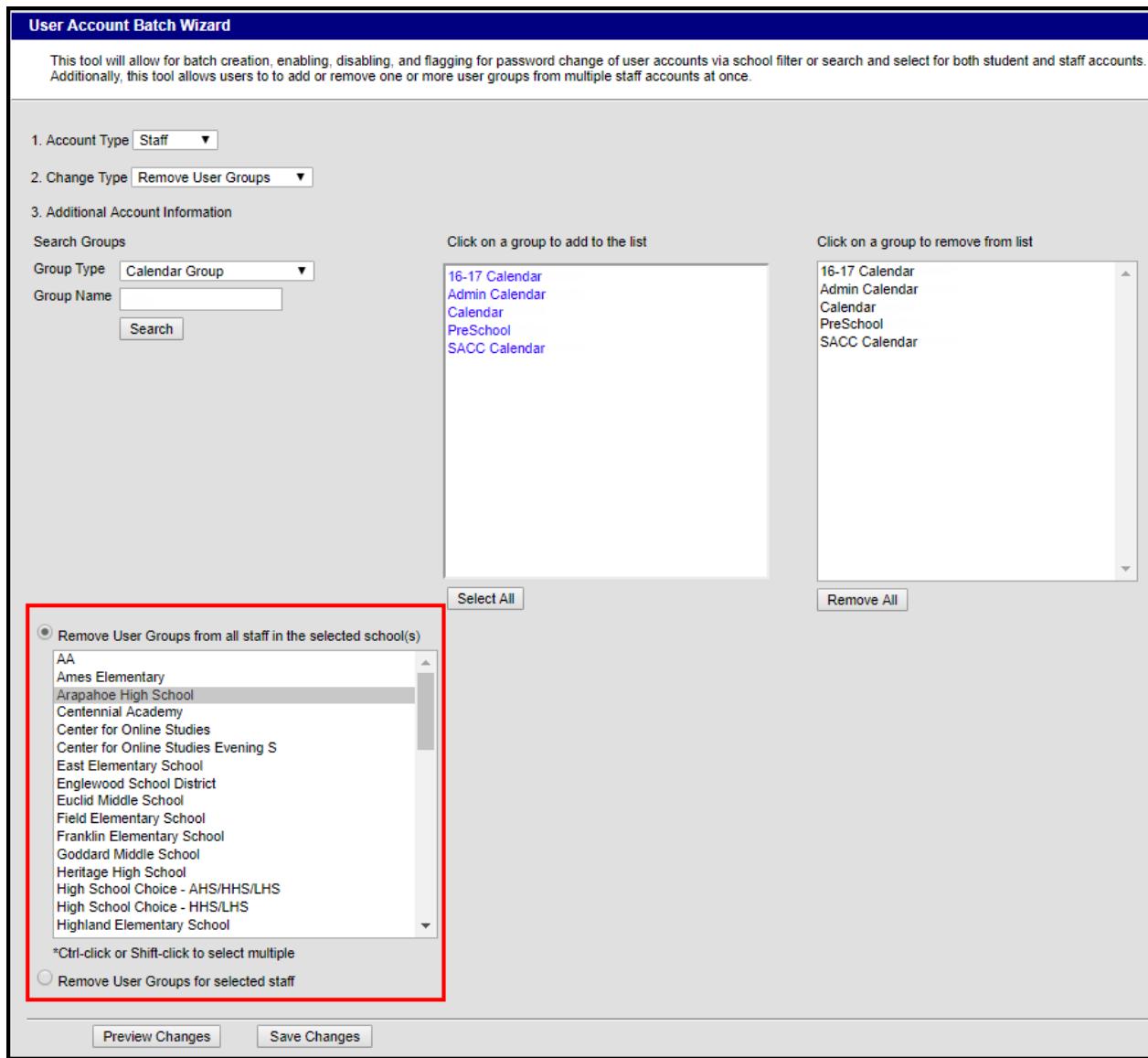
Image 28: Removing User Groups for All Staff in a School(s)

Remove User Groups for Specific Staff Members

To remove user groups for specific staff members:

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Remove User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be removed from these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be

added for removal.

8. Select the **Remove User Groups for selected staff** radio button.

9. Search for a person by entering identifying criteria (e.g., Last Name, First Name, Gender, Title, etc) and click the **Search** button. Search results will appear in the window to the right.

> Search results are district-wide.

10. Select which users will have user groups removed by click on their name in the **Select a person to add to edit list** window. Once a person is selected they will appear in the **Click on a person to remove from list** window.
11. To preview a list of what user groups will be removed for which people, click the **Preview Changes** button. A report will appear in CSV format.
12. Once ready initiate the removal of the user groups, select the **Save Changes** button. Specified User Groups have now been removed for the selected users.

Image 29: Removing User Groups for Specific Staff Members

Below is an example of the report that will appear once the **Save Changes** button is selected.

User Account Batch Wizard Preview				
Generated on 10/26/2017 02:36:33 PM				
Account Type: staff				
Change Type: removeGroups				
LastName	FirstName	MiddleName	UserName	GroupName
Johnson	Carole		CMJohnson	16-17 Calendar
Johnson	Carole		CMJohnson	Admin Calendar
Johnson	Carole		CMJohnson	Calendar
Johnson	Carole		CMJohnson	PreSchool
Johnson	Carole		CMJohnson	SACC Calendar
Johnson	Carolyn		CFJohnson	16-17 Calendar
Johnson	Carolyn		CFJohnson	Admin Calendar
Johnson	Carolyn		CFJohnson	Calendar
Johnson	Carolyn		CFJohnson	PreSchool
Johnson	Carolyn		CFJohnson	SACC Calendar

Image 30: Example of the Remove User Groups Report

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 by using the User Account Messenger, User Account Messenger Scheduler, and Account Letter Builder tools.

▸ Click here to expand...

See the following sections below for more information:

- Creating an Email Message to Inform Users of Their New User Account
- Establishing a Recurring User Account Activation Message
- Creating Letters to Inform Users of Newly Created User Accounts

Creating an Email Message to Inform Users of Their New User Account

Tool Search: User Account Messenger

You can use the User Account Messenger to send an email for users to follow and access their new user account.

Image 31: User Account Messenger

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 can be combined with Filter Parameters to identify only those users who have 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 32):

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

Image 32: Filter of Users Who Need to Log into their User Account

Once this filter is created, use the User Account Messenger to send a message to each one of these users.

This message should include the following Campus fields:

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

- The **accountManagmeent.uniqueLinkExpirationDate** field.

You should also enter an **Account Activation URL Expiration Date** (see Image 33). This is the date the unique activation URL contained in the message will expire. Users will need to select this URL prior to this date.

Filter criteria is important when sending this message. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Staff Accounts, etc) will receive the message and be able to activate their accounts.

For notifying Staff, please consider the following:

- 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.

Image 33: Informing Users who Need to Log into Their User Account

Establishing a Recurring User Account Activation Message

Tool Search: User Account Messenger Scheduler

Once you have created and saved a user account activation message in the User Account Messenger tool (see the steps mentioned in the section above), you can establish a daily, weekly, or monthly recurring message event using the User Account Messenger Scheduler.
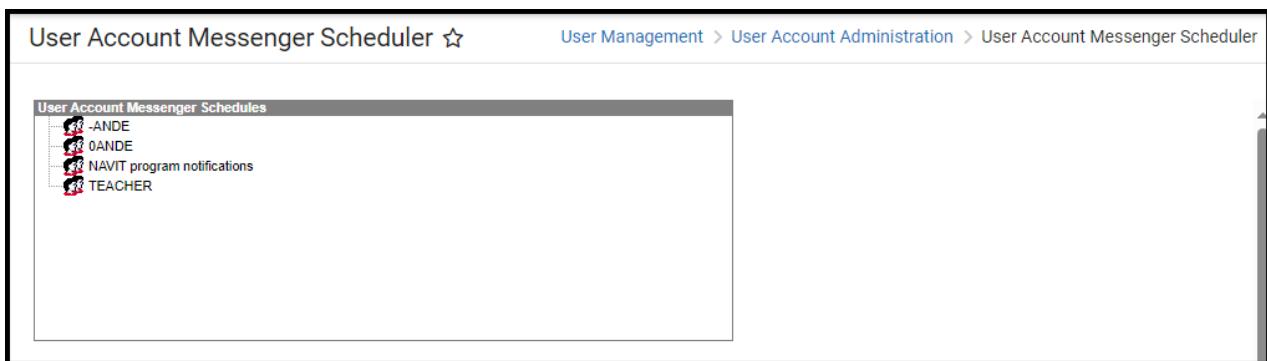
Image 34: User Account Message Scheduler

For example, using a user account activation message template and setting to a frequency of daily, you can set the User Account Messenger Scheduler to email the user account activation email to any user accounts created in the last 24 hours and repeat this process every day within a certain timeframe.

See the User Account Messenger Scheduler article for more information about this process.

Creating Letters to Inform Users of Newly Created User Accounts

Tool Search: User Account Letter Builder

You can use the User Account Letter Builder to 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.

Image 35: Account Letter Builder

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 can be combined with Filter Parameters to identify only those users who have 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 35):

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

○ Operator: =TRUE

Image 36: 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 36):

- The **accountManagement.username** field.
- The **accountManagement.uniqueLinkActivationURL** field.
- The **accountManagmeent.uniqueLinkExpirationDate** field.
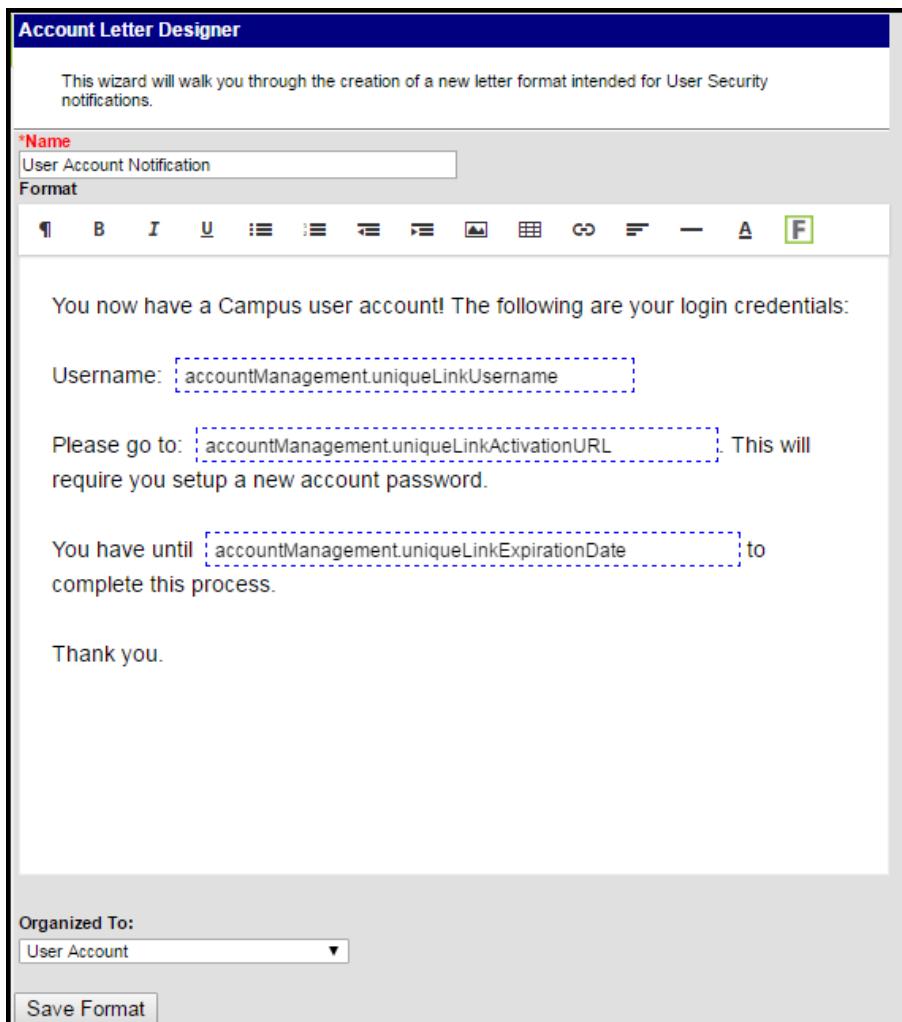
Image 37: Building a Letter to Inform Users who Need to Log Into Their Account

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

1. Select a **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 37). 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.
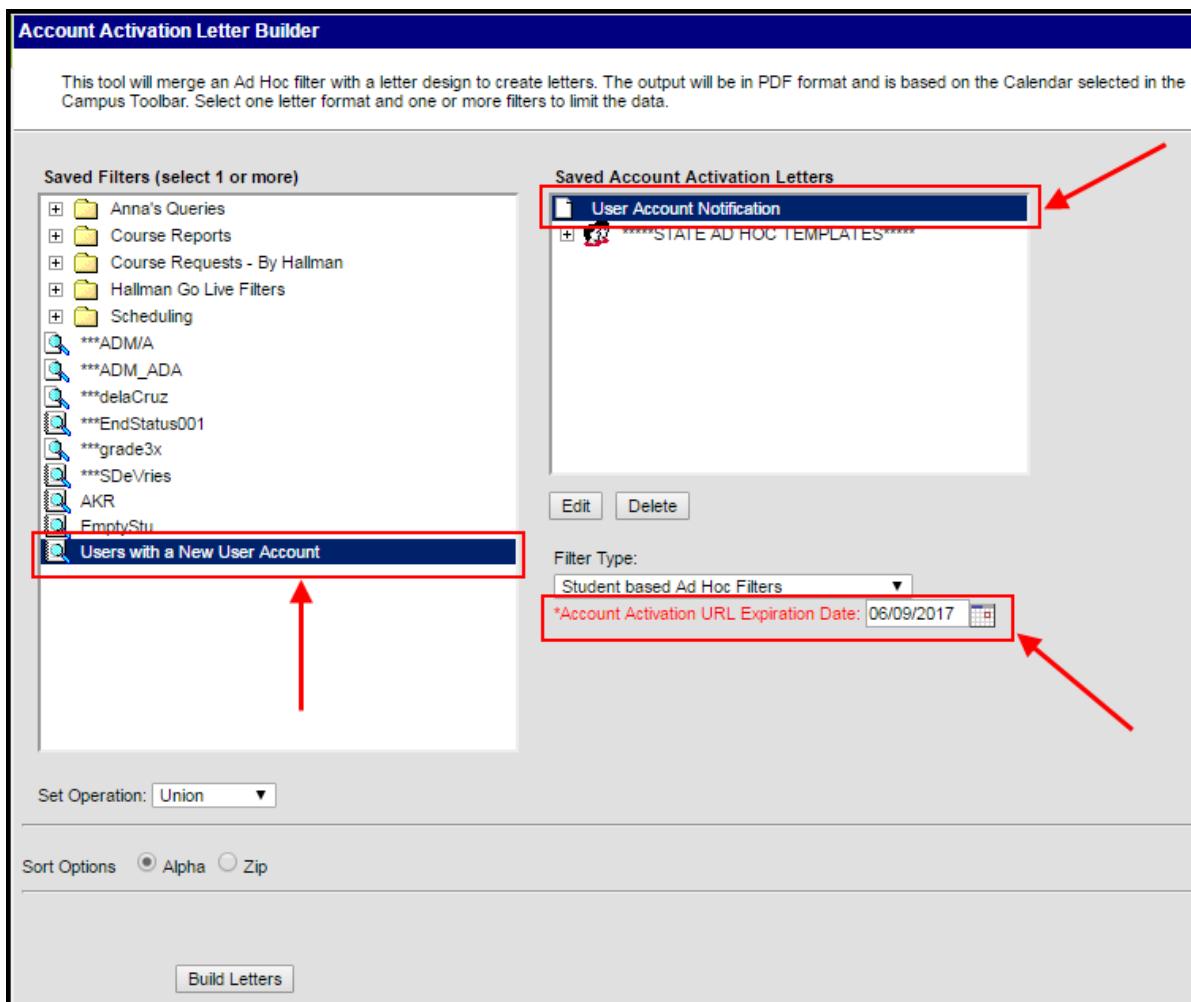
Image 38: Generating a Letter

Below is an example of a generated letter using this scenario (Image 38).

Image 39: Example of a Letter

+ Video

View and Report Calendar Rights Access

User Group Report

The User Group Report provides high-level and detailed information about which user groups exist, all tool rights and calendar rights assigned to each user group, and which user groups are assigned to which Staff Account Automation rules.

+ Documentation

+ Video

Tool & Calendar Right Access Report

The Tool and Calendar Right Access Report allows you to view a list of all users or user groups who have been granted tool rights for a specific tool and/or rights to a particular calendar.

+ Documentation

+ Video