

Tool Rights User Groups - Study Guide

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Tool rights user groups allow you to determine which tools are accessible and what level of data modification is accessible for all users assigned to the user group.

Tool rights user groups are an efficient way to assign the same tools and data rights to a similar group of people (e.g, teachers, counselors, attendance clerks) and provides an easy way to remove or modify tool rights for a group of people.

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Individual User Accounts and Tool Rights

Users Allowed to Assign Tool Rights

Tool rights can only be assigned by users who have Student Information System - Product Security Role. See the documentation below for more information about Product Security Roles.

+ [Documentation](#)

+ [Documentation](#)

Individual Tool Rights

Tool rights can be assigned individually for each user however, assigning individually can be both time consuming and hard to manage. Unlike tool rights user groups, removing or adding tool rights for users can become a tedious process.

+ [Documentation](#)

+ [Video](#)

Tool Rights Groups

Create Tool Rights Groups

The first step in the process is to create user groups. Providing a clear and informative user group name and description is helpful when searching for and assigning users to user groups.

+ [Documentation](#)

Assign Tool Rights to Groups

Once user groups have been created, tool rights should be assigned to each user group.

The learning content below will describe how to assign tool rights and what each level of tool rights means.

+ [Documentation](#)

Assign Individual Users to Tool Rights Groups

You can assign individual users to tool rights user groups by accessing the User Groups tab.

+ [Documentation](#)

Mass Assign Users to Tool Rights Groups

An efficient way to assign users to user groups is to use the User Account Batch Wizard. This tool allows you to mass assign users to a specific user group or set of user groups.

+ [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](#)

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. / update.

1. Account Type

2. Change Type

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 - NHLHC
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 NHLHC (Non Rpt)
2021-22 ECFE NHLHC 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

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.

- 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
<div> <p>User Account Batch Wizard</p> <p>This tool can be used to batch create, enable or disable student and staff accounts, or flag them for password change/update.</p> <p>1. Account Type Students</p> <p>2. Change Type Disable Account</p> <p>3. Additional Account Information</p> <p><input checked="" type="radio"/> Disable user accounts for all active students in the selected calendar(s)</p> <ul style="list-style-type: none"> 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 - Nai 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 <p><small>*Ctrl-click or Shift-click to select multiple</small></p> <p><input type="radio"/> Disable user accounts for all selected students</p> <p>Preview Changes Save Changes</p> </div>	<div> <p>User Account Batch Wizard</p> <p>This tool can be used to batch create, enable or disable student and staff accounts, or flag them for password change/update.</p> <p>1. Account Type Staff</p> <p>2. Change Type Disable Account</p> <p>3. Additional Account Information</p> <p><input checked="" type="radio"/> Disable user accounts for all staff in the selected school(s)</p> <ul style="list-style-type: none"> 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 <p><small>*Ctrl-click or Shift-click to select multiple</small></p> <p><input type="radio"/> Disable user accounts for all selected staff</p> <p>Preview Changes Save Changes</p> </div>

Disable User Accounts for All Selected Students or Staff

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

- 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).
- Select a **Change Type** of 'Enable Account'.
- Mark the **Disable user accounts for selected students** OR **Disable user accounts for all selected staff** radio button.
- 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.

- 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.
- To preview a list of all user accounts that will be disabled, click the **Preview Changes** button. A report will appear in CSV format.
- 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.

[illegible]

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 09/20/2017 11:47:29 AM			
Account Type: students			
Change Type: disableAccount			
Total number of accounts: 1			
LastName	FirstName	MiddleName	Username
Tester	Jeff	J	testerjeff

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
<div style="border: 1px solid #ccc; padding: 5px;"> <p>User Account Batch Wizard</p> <p>This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select.</p> <p>1. Account Type: Students</p> <p>2. Change Type: Force Password Change</p> <p>3. Additional Account Information</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p><input checked="" type="radio"/> Force password change for all student accounts in the selected school(s)</p> <ul style="list-style-type: none"> ACCEL Early Learning ACCEL East Campus ACCEL Metro Campus ACES East Andersen Elementary School Andersen Junior High School Arizona College Prep Erie Campus Arizona College Prep Oakland Campus Autism Academy for Education and Develop Auxier Elementary School AZ Aspire Academy Banner Academy Basha Elementary School Basha High School Bogle Junior High School Bologna Elementary School </div> <p><small>*Ctrl-click or Shift-click to select multiple</small></p> <p><input type="radio"/> Force password change for all selected students</p> <p style="text-align: right;"> <input type="button" value="Preview Changes"/> <input type="button" value="Save Changes"/> </p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>User Account Batch Wizard</p> <p>This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.</p> <p>1. Account Type: Staff</p> <p>2. Change Type: Force Password Change</p> <p>3. Additional Account Information</p> <div style="border: 1px solid red; padding: 5px; margin: 5px 0;"> <p><input checked="" type="radio"/> Force password change for all staff accounts in the selected school(s)</p> <ul style="list-style-type: none"> ACCEL Early Learning ACCEL East Campus ACCEL Metro Campus ACES East Andersen Elementary School Andersen Junior High School Arizona College Prep Erie Campus Arizona College Prep Oakland Campus Autism Academy for Education and Develop Auxier Elementary School AZ Aspire Academy Banner Academy Basha Elementary School Basha High School Bogle Junior High School Bologna Elementary School </div> <p><small>*Ctrl-click or Shift-click to select multiple</small></p> <p><input type="radio"/> Force password change for all selected staff</p> <p style="text-align: right;"> <input type="button" value="Preview Changes"/> <input type="button" value="Save Changes"/> </p> </div>

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.

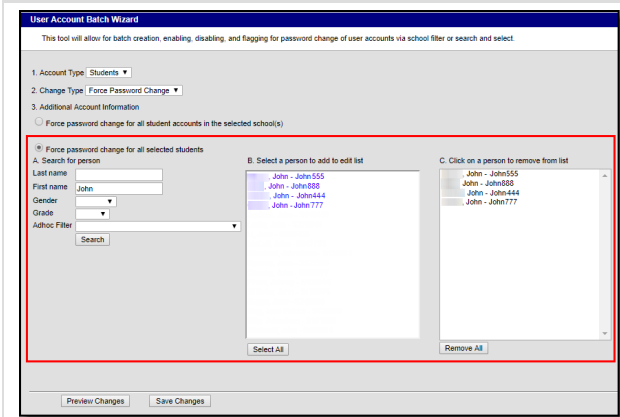
- Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

Search results are district-wide.

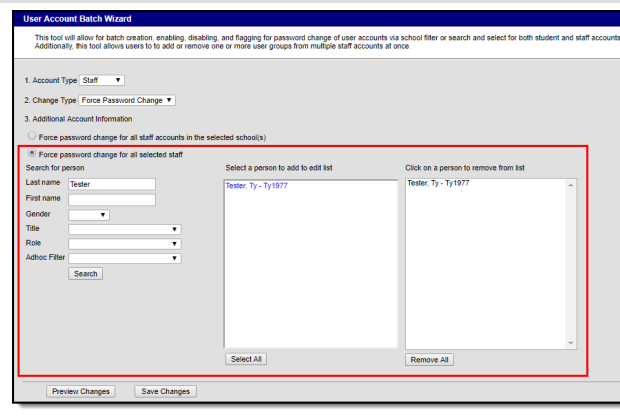
- In the **B. Select a person to add to edit list** window, select the name of each person who will be forced to change their password. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.
- To preview a list of all user accounts that will be impacted, click the **Preview Changes** button. A report will appear in CSV format.
- 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	
[REDACTED]				John	Tester	John555	
[REDACTED]				John	Tester	John888	
[REDACTED]				John	Tester	John444	
[REDACTED]				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](#)

User Account Batch Wizard

This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.

1. Account Type: **Staff**

2. Change Type: **Add User Groups**

3. Additional Account Information

Search Groups

Group Type: **Calendar Group**

Group Name: **wilder**

Search

Click on a group to add to the list

Wilder 16-17 Calendar
Wilder Admin Calendar
Wilder Calendar
Wilder PreSchool
Wilder SACC Calendar

Select All

Click on a group to remove from list

Wilder 16-17 Calendar

Remove All

☒ Add User Groups to all staff in the selected school(s)

AA
Ames Elementary
Arapahoe High School
Centennial Academy
Center for Online Studies
Center for Online Studies Evening S
East Elementary School
Englewood School District
Euclid Middle School
Field Elementary School
Franklin Elementary School
Goddard Middle School
Heritage High School
High School Choice - AHS/HHS/LHS
High School Choice - HHS/LHS
Highland Elementary School

*Ctrl-click or Shift-click to select multiple

☐ Add User Groups for selected staff

Preview Changes **Save Changes**

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.

User Account Batch Wizard

This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.

1. Account Type

Staff

2. Change Type

Add User Groups

3. Additional Account Information

Search Groups

Group Type

Calendar Group

Group Name

Search

Click on a group to add to the list

16-17 Calendar

Admin Calendar

Calendar

PreSchool

SACC Calendar

Select All

Click on a group to remove from list

16-17 Calendar

Remove All

☐ Add User Groups to all staff in the selected school(s)

☒ Add User Groups for selected staff

Search for person

Last name

Johnson

First name

Gender

Title

Role

Adhoc Filter

Search

Select a person to add to edit list

Johnson, Carole - CMJohnson

Johnson, Carolyn - CFJohnson

Johnson, Geri - GJohnson

Select All

Click on a person to remove from list

Johnson, Carole - CMJohnson

Johnson, Carolyn - CFJohnson

Remove All

Preview Changes

Save Changes

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](#)

User Account Batch Wizard

This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.

1. Account Type: **Staff** ▼

2. Change Type: **Remove User Groups** ▼

3. Additional Account Information

Search Groups

Group Type: --Select User Group Type-- ▼

Group Name:

Click on a group to add to the list

Click on a group to remove from list

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.

User Account Batch Wizard

This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.

1. Account Type

2. Change Type

3. Additional Account Information

Search Groups

Group Type

Group Name

Click on a group to add to the list

16-17 Calendar
Admin Calendar
Calendar
PreSchool
SACC Calendar

Click on a group to remove from list

16-17 Calendar
Admin Calendar
Calendar
PreSchool
SACC Calendar

☒ Remove User Groups from all staff in the selected school(s)

AA
Ames Elementary
Arapahoe High School
Centennial Academy
Center for Online Studies
Center for Online Studies Evening S
East Elementary School
Englewood School District
Euclid Middle School
Field Elementary School
Franklin Elementary School
Goddard Middle School
Heritage High School
High School Choice - AHS/HHS/LHS
High School Choice - HHS/LHS
Highland Elementary School

*Ctrl-click or Shift-click to select multiple

☐ Remove User Groups for selected staff

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.

User Account Batch Wizard

This tool will allow for batch creation, enabling, disabling, and flagging for password change of user accounts via school filter or search and select for both student and staff accounts. Additionally, this tool allows users to add or remove one or more user groups from multiple staff accounts at once.

1. Account Type

Staff

2. Change Type

Remove User Groups

3. Additional Account Information

Search Groups

Group Type

Calendar Group

Group Name

Search

Click on a group to add to the list

16-17 Calendar

Admin Calendar

Calendar

PreSchool

SACC Calendar

Select All

Click on a group to remove from list

16-17 Calendar

Admin Calendar

Calendar

PreSchool

SACC Calendar

Remove All

Remove User Groups from all staff in the selected school(s)

Remove User Groups for selected staff

Search for person

Last name

Johnson

First name

Gender

Title

Role

Adhoc Filter

Search

Select a person to add to edit list

Johnson, Carole - CMJohnson

Johnson, Carolyn - CFJohnson

Johnson, Geri - GJohnson

Select All

Click on a person to remove from list

Johnson, Carole - CMJohnson

Johnson, Carolyn - CFJohnson

Remove All

Preview Changes

Save Changes

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.

Page 18

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.

User Account Messenger ☆

User Management > User Account Administration > User Account Messenger

User Account Messenger

The User Account Messenger will send security account-related messages to Messenger contacts for student and/or staff and/or parent and guardian accounts based upon the criteria selected in the filter criteria section below. You can select between a generic Student, Staff or Parent/Guardian with a force change password setting or a specific expiration date filter, or you can select amongst the student or person (Census/Staff) based Ad Hoc filter or utilize an additional auto-generated guardian selection which is based upon a student based Ad Hoc filter.

Additional functionality includes the ability to generate messages with a unique account activation URL and an expiration date for the end user to log on. This expiration date can be set in the filter criteria section below and will always be required when the uniqueLinkActivationURL Campus field is selected in the Messenger editor. Please see the associated help for this tool for more detailed information.

As with the standard Messenger functionality, the Template Name and User/Group can be changed after selecting Save or Copy. Messages templates that have been saved can be scheduled for automatic delivery in the User Account Messenger Scheduler tool.

User/Group User

Template <new> Save Copy Delete

Enter the filter criteria for User Account Builder:

Deliver to:

☐ Individual Search

☐ Student
 ☐ Staff Member
 ☐ Parent/Guardian
 ☐ Force Change Password

Expiration Date

☐ Student based Ad Hoc Filters

☐ Census/Staff based Ad Hoc Filters (Portal Accounts)

☐ Census/Staff based Ad Hoc Filters (Staff Accounts)

☐ Guardians of Student based Ad Hoc Filters

Account Activation URL Expiration Date: 03/27/2024

Reply To Email: icdemo@icdemo.mg.infinitecampus.org

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

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 Search Clear

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		

Add

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 **accountManagement.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.

User Account Messenger

The User Account Messenger will send security account-related messages to Messenger contacts for student and/or staff and/or parent and guardian accounts based upon the criteria selected in the filter criteria section below. You can select between a generic Student, Staff or Parent/Guardian with a force change password setting or a specific expiration date filter, or you can select amongst the student or person (Census/Staff) based Ad Hoc filter or utilize an additional auto-generated guardian selection which is based upon a student based Ad Hoc filter.

Additional functionality includes the ability to generate messages with a unique account activation URL and an expiration date for the end user to log on. This expiration date can be set in the filter criteria section below and will always be required when the uniqueLinkActivationURL Campus field is selected in the Messenger editor. Please see the associated help for this tool for more detailed information.

As with the standard Messenger functionality, the Template Name and User/Group can be changed after selecting Save or Copy.

User/Group User Template <new> Save Copy Delete

Enter the filter criteria for User Account Builder:

Deliver to:

☐ Individual Search

☐ Student
 ☐ Staff Member
 ☐ Parent/Guardian
 ☐ Force Change Password

☒ Student based Ad Hoc Filters

UAM-2016-09-26-17-21-33-jmm.csv

☐ Census/Staff based Ad Hoc Filters (Portal Accounts)

☐ Census/Staff based Ad Hoc Filters (Staff Accounts)

☐ Guardians of Student based Ad Hoc Filters

Account Activation URL Expiration Date: 06/09/2017

Message Subject: User Account Activation

Message Body

B

I

U

</

Username:

Please go to and update your account password.

You have until to complete this process.

Thanks!

Delivery Date:

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](#).

User Account Messenger Scheduler ☆

User Management > User Account Administration > User Account Messenger Scheduler

User Account Messenger Schedules

- ANDE
- 0ANDE
- NAVIT program notifications
- TEACHER

Image 34: User Account Message Scheduler

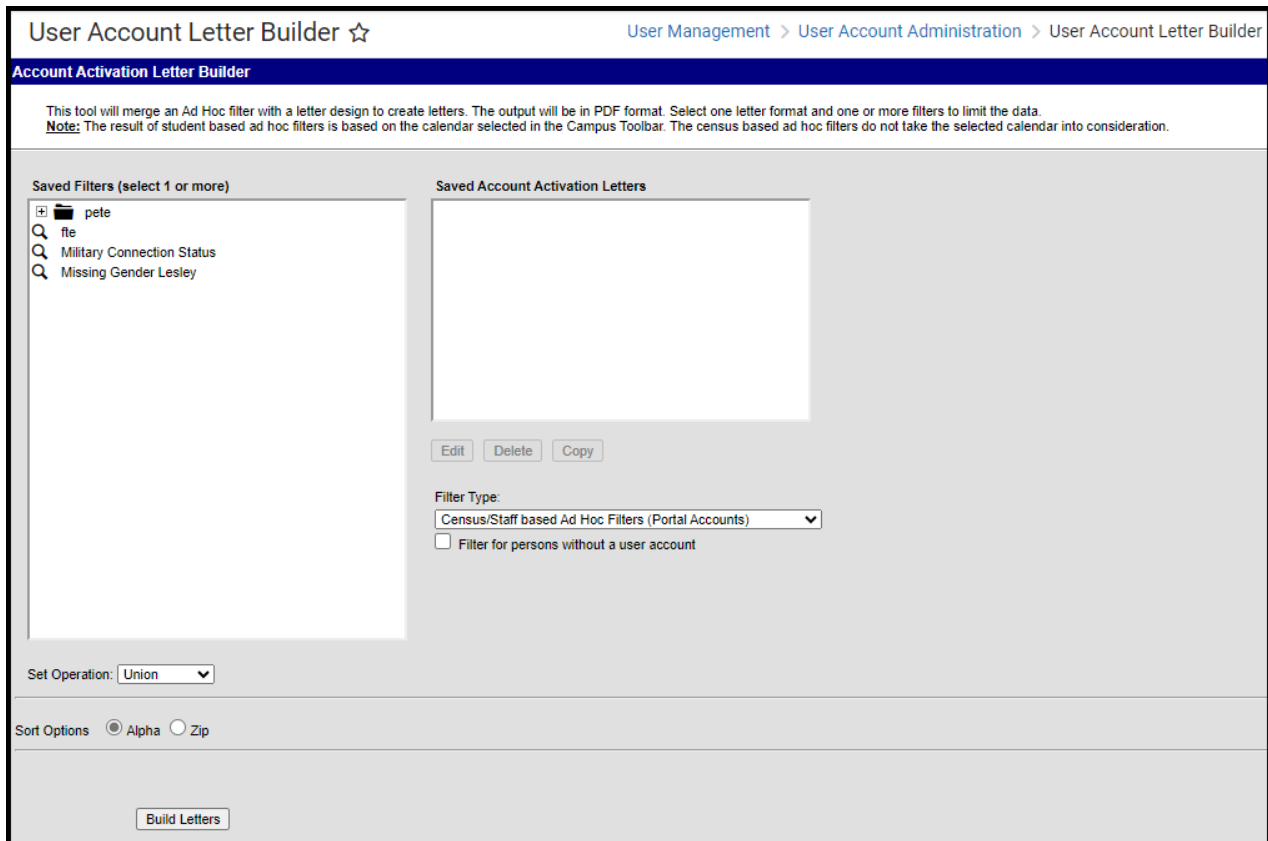
For example, using a user account activation message template and setting to a frequency of daily, you can set the User Account Messenger Scheduler to email the user account activation email to any user accounts created in the last 24 hours and repeat this process every day within a certain timeframe.

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.



The screenshot shows the 'User Account Letter Builder' interface. At the top, there is 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 interface is divided into two main sections: 'Saved Filters (select 1 or more)' and 'Saved Account Activation Letters'. The 'Saved Filters' section contains a list of filters: 'pete', 'fte', 'Military Connection Status', and 'Missing Gender Lesley'. The 'Saved Account Activation Letters' section is currently empty. Below these sections, there are buttons for 'Edit', 'Delete', and 'Copy'. A 'Filter Type' dropdown menu is set to 'Census/Staff based Ad Hoc Filters (Portal Accounts)'. A checkbox labeled 'Filter for persons without a user account' is present and unchecked. At the bottom, there is a 'Set Operation' dropdown menu set to 'Union', 'Sort Options' with radio buttons for 'Alpha' (selected) and 'Zip', and a 'Build Letters' button.

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

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 Search Clear

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		

Add

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 **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 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**.

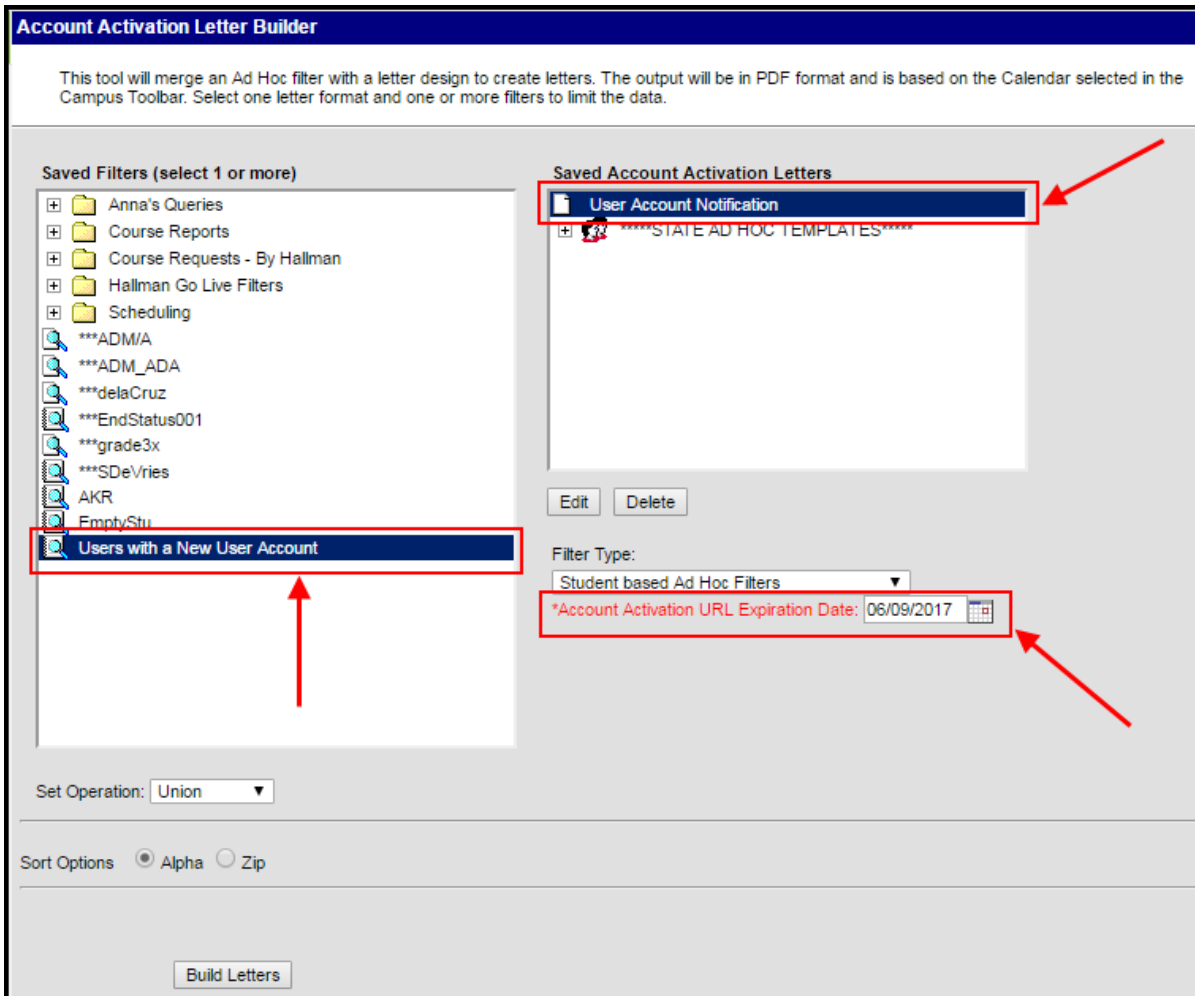
Filter criteria is important when generating this letter. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Portal Accounts), etc) will have a letter generated.

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.



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 and is based on the Calendar selected in the Campus Toolbar. Select one letter format and one or more filters to limit the data.

Saved Filters (select 1 or more)

- Anna's Queries
- Course Reports
- Course Requests - By Hallman
- Hallman Go Live Filters
- Scheduling
- ***ADM/A
- ***ADM_ADA
- ***delaCruz
- ***EndStatus001
- ***grade3x
- ***SDeVries
- AKR
- EmptyStu
- 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 38: Generating a Letter

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

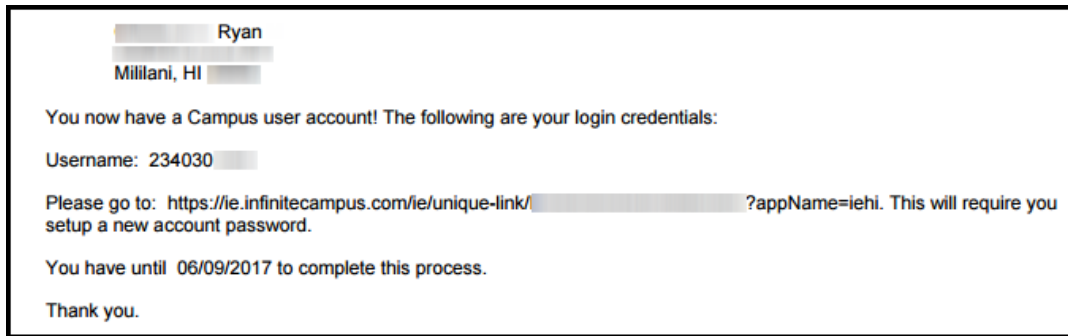


Image 39: Example of a Letter

+ Video

Tool Rights Reports

Tool and Calendar Rights Access Report

Once users have been assigned to tool rights user groups, you can audit which users or user groups have been granted tool rights for a specific tool by using the Tool and Calendar Rights Access Report.

+ Documentation

+ Video

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
