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**Quick Reference Guide:**

## ***Creating & Modifying Users***

*This guide will help districts create new and modify existing users.*

*Topics covered in this Quick Reference Guide include:*

- *Creating People*
  - *Creating New Users*
  - *Modifying Existing Users*
  - *Ending Users*
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This guide is designed to walk districts through the process of creating users, either for Special Education or for AIM Collection data entry. Users changing positions within the district or leaving the district will need to have User Accounts modified to reflect their current employment and/or job status.



Before beginning, consider the following:

- 1. We have a new secretary in charge of AIM this year. What do I need to do to give her access to AIM?**
  - Staff members who are accessing the district's AIM MT Edition should have individual User Accounts. Create the new staff member as a Person and create a User. *page 2, 5*
- 2. I have a teacher who is assuming new duties this year. How do I modify her user rights?**
  - Modify the District Assignment and the User Group(s) the teacher has access to. *page 9*
- 3. My Special Education teacher left at the end of last year. How do I end her access into my system and add the new teacher?**
  - District Employment, District Assignments and User Accounts should be ended when a staff member leaves. Never delete users or accounts, unless they were created in error. New staff members should be created first as People, then assign a User Account. *page 10*

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## CREATING PEOPLE

**Users** are first created as **People**.

From the **Index**, expand the **Census** module. Select **Add Person**.

Type in the *Last Name* of the person you are creating. If the person does not already exist in your database, the results will show "*No Person matches found*".

Click **Create New Person**.

**Person Search**

Person Search  
Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.

\*Last Name

First Name

Middle Name

Birth Date

Gender

Search

No Person matches found.

Create New Person

**New Person**

Person Creation  
Fill out the form to create a new Person in Campus. Click save to create the person, afterwards, they will appear in the list below.

**Person Information**

\*Last Name  \*First Name  Middle Name  Suffix

\*Gender  Birth Date  Soc Sec Number

**Race/Ethnicity**

Is the individual Hispanic/Latino?

Is the individual from one or more of the these races?  
(check all that apply)

American Indian or Alaska Native  
 Asian  
 Black or African American  
 Native Hawaiian or Other Pacific Islander

Save

Enter *First Name* and *Gender*.

Click **Save**.

Creating people is a **Census** function. It is not necessary to have a specific **School** and/or **Calendar** selected.

A *Details* box will appear once the save is complete.

Click the name of the person in the *Details* box. The **Demographics** tab will display.

Scroll down to *Personal Contact Information*. Enter *Phone number(s)* and/or *Email*. Click **Save**.

*This step is not required for state reporting, but does allow the person's name and phone number to appear on a Records Transfer request or a student's IEP forms.*

Click the **District Employment** tab.  
Click **New**.

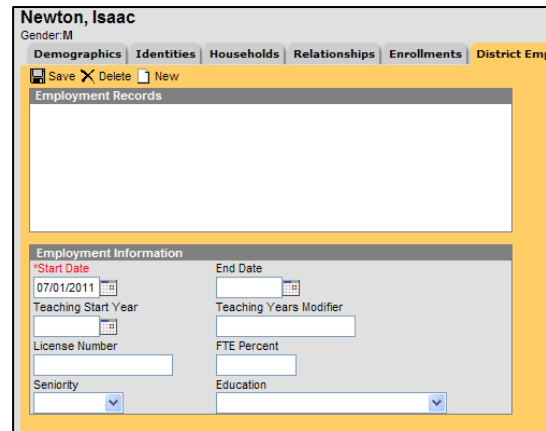
A warning will appear requesting that you search for the *Staff ID* (*Staff ID* is not required for Montana users).

Click **Cancel**.

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Enter *Start Date*.

Click **Save**.



The *Start Date* on the **District Employment** and **District Assignment** tabs are, essentially, effective dates. Districts do not need to enter a person's historical start date or teaching start date in the school or district.

A **District Assignment** is created for each school in which staff members have assignments or responsibilities. Each **District Assignment** and the information marked determines if a staff member appears as an item for selection in reports, wizards, and other editors (i.e., IEP team member at the assigned school). This process **does not** assign user rights.

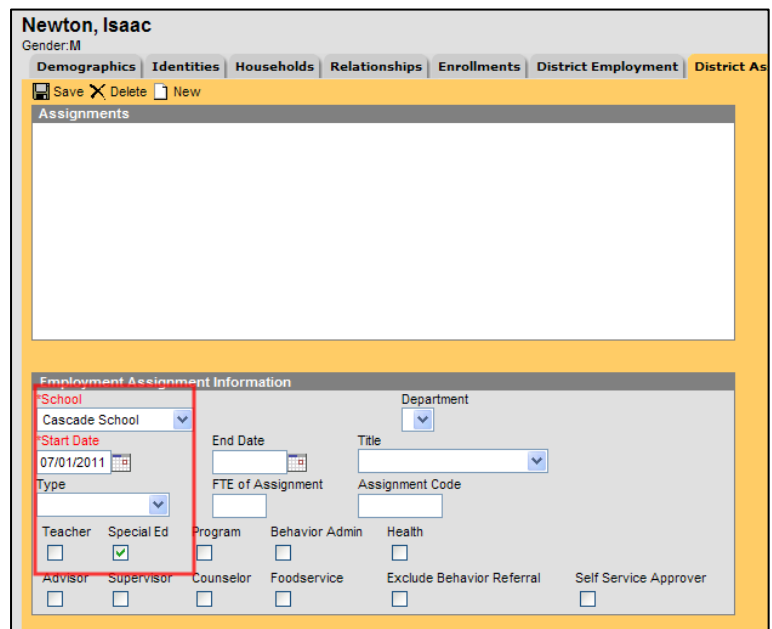
Click the District **Assignments** tab.  
Click **New Assignment**. Click **Cancel** when prompted to search for *Staff ID*.

Select a *School* and *Start Date*.

Click the box for *Special Ed*. Selection of this field allows a person to be added as a Team Member on a student's Individualized Education Program (IEP).

Click **Save**.

Repeat for each school the staff member has an assignment in.



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## CREATING USERS

Any **Person** who needs access to the AIM system for data entry can be assigned **User Rights**.

To create a **User**, click on the **Search** tab. In the *Search for a:* box, select *User*. Type the *Last Name* and click **Go**.

Click the name under **Search Results**.

Enter a *Username* and *Password*.

User names must have 6 or more characters. For consistency the OPI recommends that User names be the portion of the User's district email preceding the @ symbol. User names are not case sensitive, but passwords are case sensitive.

Passwords may be set to a generic password (e.g., the word password or the district's mascot). If Force Password Change is checked on the User Account screen the user may enter their own password the first time they use the account.

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Check the appropriate boxes for the User's **Calendar** and **Tool Rights**. **Calendar Rights** have a plus (+), minus (-) or zero (0) preceding them. **Tool Rights** are designed to reflect the job duties of the **User**.

Click **Create User**.

All Users should be checked for all Users – this **Tool Right** allows access to the *Log Off* function.

**Newton, Isaac**

Username:

Password:

Homepage:

+Cascade 7-8       +Cascade HS       +Cascade School  
 -Cascade 7-8       -Cascade HS       -Cascade School  
 0Cascade 7-8       0Cascade HS       0Cascade School  
 Ad Hoc Read Only       Ad Hoc Reporting       All Users  
 Attendance Clerks       Counselors       Disciplinary Staff  
 Health Staff       Master Schedulers       Principals  
 Read Only       Records Transfer       Registrars (Census)  
 Special Education Admin       Special Education Staff       Sped Read Only  
 State Reporting Staff       Teachers

The **User Account** screen shows information related to a **User's** account. In addition to changes to the *Username* and *Password*, a System Administrator can use the following tools:

**User: inewton**  
Person: Newton, Isaac

**User Account Editor**

\*Username:  \*Password:

Disabled     Force Password Change     All Tools     All Calendars     Hide Banner

Expires Date:     Homepage:

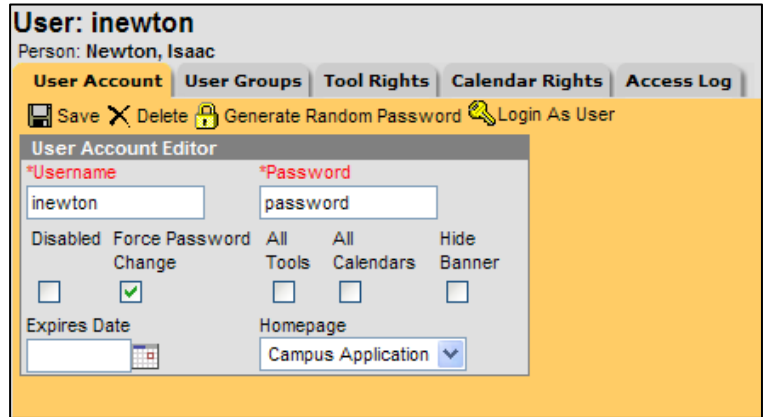
- **DISABLED** - an account is automatically disabled with 5 or more consecutive incorrect log-ins.
- **FORCE PASSWORD CHANGE** – allows the System Administrator to set up User Accounts with generic passwords. Users then select their own password with their first log-in.
- **ALL TOOLS** – allows a user rights to all functionality within the AIM system. This is only recommended for the district's System Administrator.
- **ALL CALENDARS** – an easier option than selecting all calendar groups for users who should have access to all calendars in all years.
- **HIDE BANNER** – increases workspace by hiding the Infinite Campus logo at the top of the screen.
- **EXPIRES DATE** – the User Account will expire at midnight on the date entered into this box. This tool is good for setting access to a limited period of time.
- **HOME PAGE** – gives the user rights to either the Campus Application or the Parent Portal.

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The other **User Account** tabs allow the System Administrator to modify/view information about the User's **Calendar** and/or **Tool Rights**.

*It is not recommended that individual Tool or Calendar rights be added to any User Account.*

The **Access Log** is a historical record of log-ins (either successful or unsuccessful) for the specified **User**.



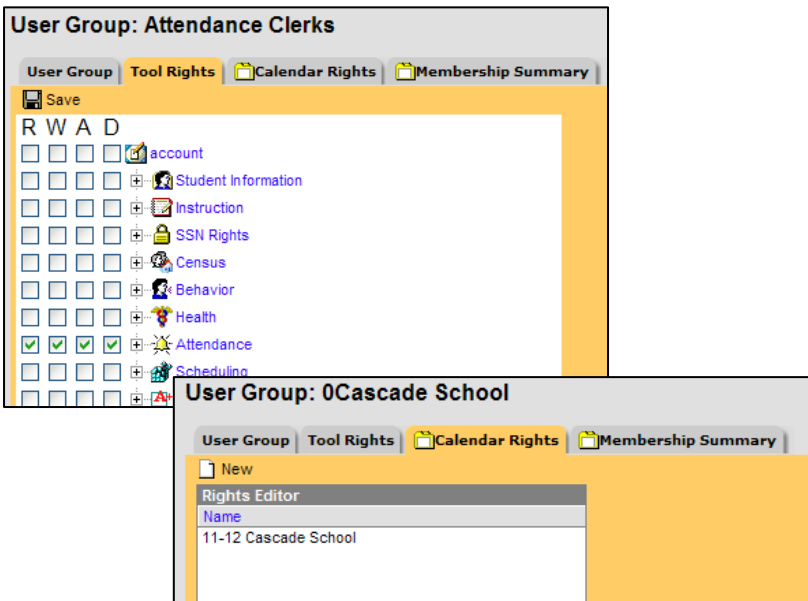
**User Groups** have been created by the OPI, in conjunction with Infinite Campus, to set up core roles for District Users.

**Calendar Groups** allow a User access to a specific school in a specific year. The minus (-) symbol is last year's calendar, the plus (+) symbol is next year's calendar, and the numeral zero (0), is the current year's calendar.

**Tool Rights** give access to tools that help a User accomplish the specified task (e.g., Special Education Staff have tool rights that allow them to modify IEP's, but not tool rights that allow them to take attendance or modify User Accounts).

The OPI recommends that districts modify groups, rather than individual User Accounts. Modifying groups gives all Users with access to that group the same rights. If your district finds that a modification of rights is necessary, you may call the OPI AIM Helpdesk at 1-877-424-6681 for assistance. *Changing SPED Staff and/or SPED Admin is not recommended*

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To modify a **User Group**, click on the **Search** tab. Change the field in the *Search for a:* box to **Group**. Click **Go**.

Click on the group name. If it is a tool rights group, click on the **Tool Rights** tab. If it is a calendar rights group, click on the **Calendar Rights** tab.

To modify a tool rights group, click the **Tool Rights** tab.

R=Read

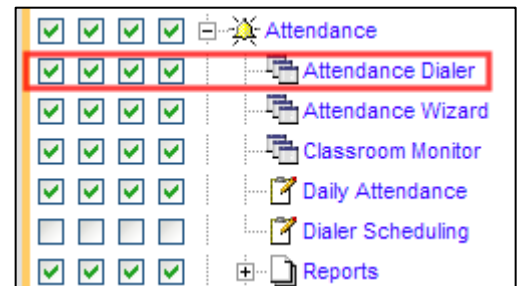
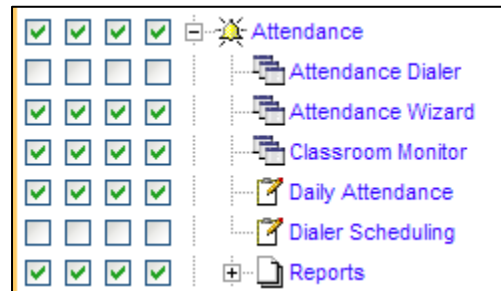
W=Write

A=Add

D=Delete

Click the boxes to add rights to a group.

Click **Save**.



Adding rights to a group adds rights to all sub-groups below. Expand tool groups to view all rights. Again, if a modification of rights is necessary, you may call the OPI AIM Helpdesk at 1-877-424-6681 for assistance. *Changing SPED Staff and/or SPED Admin is not recommended*

## MODIFYING USERS

Modifications to users could include a change of school (modifying their District Assignment), job duties (from Regular Education to Special Education), or a release from duty (quit, retire). To maintain the integrity of records, it is important **not** to delete users, unless they were created in error.

The screenshot shows the 'User Account Editor' for user 'lingalls'. The 'Delete' button is circled in red. The form includes fields for Username ('lingalls') and Password ('f@xins@x'). There are checkboxes for 'Disabled', 'Force Password Change', 'All Tools', 'All Calendars', and 'Hide Banner'. There are also fields for 'Expires Date' and 'Homepage' (set to 'Campus Application').

The screenshot shows the search results for 'Ingalls, Laura'. The search criteria are 'All People' and 'ingalls'. The results show one entry for 'Ingalls, Laura' with a 'District Assignment' tab selected.

To change the school a staff person is assigned to, change the **District Assignment**.

Click the **Search** tab. Change the *Search for a:* list to **All People**. Enter the *last name* of the **User**.

Click the **District Assignment** tab.

If the user is no longer at the school listed, first end the District Assignment. Open the assignment by clicking on the date. Enter an End Date. Click Save.

The screenshot shows the 'Employment Assignment Information' form. The 'End Date' field is highlighted with a red box. The form includes fields for 'School' (Cascade School), 'Start Date' (08/01/2010), 'End Date' (06/30/2011), 'Department', 'Title', 'Type', 'FTE of Assignment', and 'Assignment Code'. There are checkboxes for 'Teacher', 'Special Ed', 'Program', 'Behavior Admin', 'Health', 'Advisor', 'Supervisor', 'Counselor', 'Foodservice', 'Exclude Behavior Referral', and 'Self Service Approver'.

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Second, enter a new **District Assignment**.

Select the correct *School*. If the **User** is a Special Education staff member, check *Special Ed*.

Click **Save**.

To change a teacher from Regular Education to Special Education, navigate to the **District Assignments** tab.

Open the current assignment. Special Education teachers should have the *Special Ed* box checked.

Click **Save**.

## ENDING EMPLOYMENT

School district personnel who leave the district should **NEVER** have their user information deleted.

First, end the user's **District Employment**. Using the **Search** tab, *Search for a: All People*. Enter the user's *last name*. Click **Go**.

On the **District Employment** tab, open the current **Employment Record**. Enter an *End Date* (the last day of employment for this user).

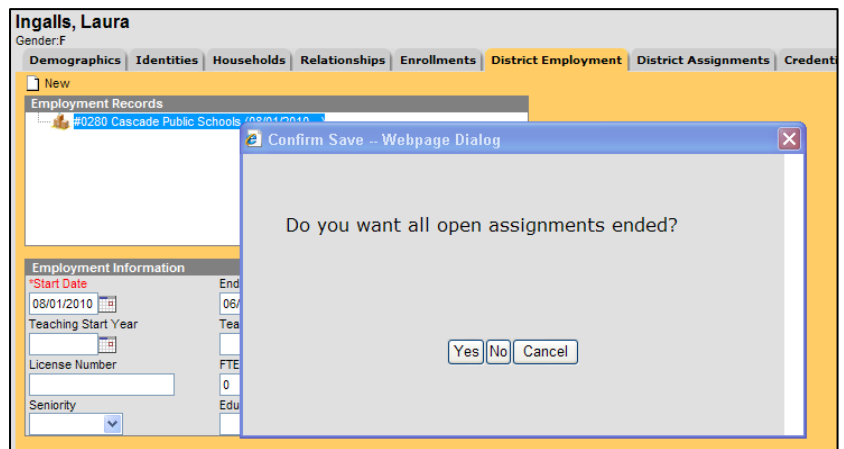
Click **Save**.

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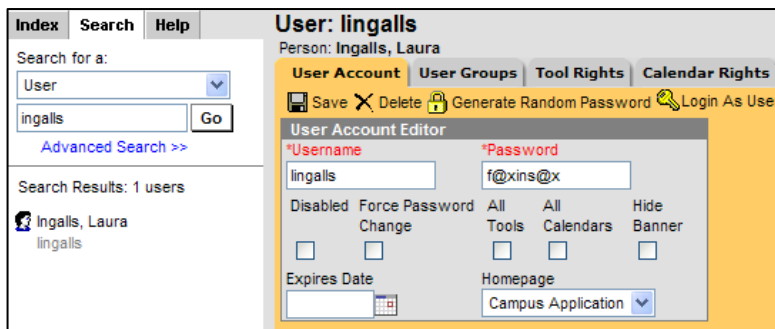
A prompt will appear, asking to end all open assignments. Click **Yes**.

All current **District Assignments** will be ended.

If the user was designated as Special Ed Staff, they will no longer appear in the list of available **Team Member's** on a student's IEP.



To remove Team Members from a student's IEP, navigate to the Team Members tab (from the Index, select Student Information/ Special Education). Search for the student by last name. Click the name of the Team Member and enter an End Date. Click **Save**. *Do not delete Team Members*



The final step is to expire the **User Account**.

Click the **Search** tab. *Search for a: User*. Enter the user's *last name*, and click **Go**.

Click the light grey user name (not the user's name in bold).

On the **User Account** tab, enter an Expires Date (the last date of employment in the district).

Click **Save**.

The **User Account** will no longer be active as of midnight on the date selected (if using a future date).

*Do not use the **Disabled** box to end **User Accounts** – the **Expires Date** is a better record of when the account was ended.*

