
Quick Reference Guide:

Creating & Modifying Users

This guide explains how to create new users and modify existing user accounts in AIM.

Topics covered in this Quick Reference Guide include:

- *Creating People*
- *Creating New Users*
- *User Groups/Tool Rights*
- *Modifying Existing Users*
- *Changing Names*
- *Ending Users*



This guide covers the process of creating users for AIM data entry, both General Ed and Special Ed. Districts must modify User Accounts to reflect current employment and/or job status when users change positions within the district or leave the district.



Before beginning, consider the following:

- 1. We have a new secretary in charge of AIM this year. How do I give her access to AIM?**
 - Staff members accessing the district's AIM should have individual User Accounts. Create the new staff member as a Person and then create a User Account. *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 7*
- 3. Our school secretary was married over the summer and I need to change her name.**
 - Create a new Identity for her as well as a new Username, if she so chooses. *page 11*
- 4. My Special Education teacher left at the end of last year. How do I end her access and add the new teacher?**
 - District Employment, District Assignments and User Accounts must be closed when a staff member leaves. Close, but do not delete, users or accounts, unless they were created in error. New staff members should be created first as People then assigned a User Account. *page 12*

CREATE NEW PERSON

Users are first created as People.

From the **Index**, expand the **Census / 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".

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?
N: No

*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

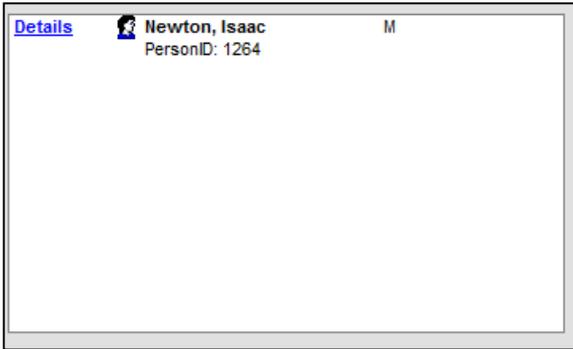
Native Hawaiian or Other Pacific Islander

Save

Enter *First Name*,
Gender and
Race/Ethnicity.

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.

Personal Contact Information		Messenger Preferences Contact			
Contact Information	Private	Emergency	Attendance	Behavior	General
Email: newtoni@school.k12.mt.us	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone: () - x	<input type="checkbox"/>				
Other Phone: () - x	<input type="checkbox"/>				
Work Phone: (406) 126 - 4567 x 8971	<input type="checkbox"/>				
Pager: () - x	<input type="checkbox"/>				

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Newton, Isaac
Gender: M

Demographics | Identities | Households | Relationships | Enrollments | **District Employment**

Save Delete New

Employment Records

Employment Information

*Start Date: 10/25/2014 End Date: []
 Teaching Start Year: [] Teaching Years Modifier: []
 License Number: [] FTE Percent: []
 Seniority: [] Education: []

ADD A DISTRICT EMPLOYMENT RECORD

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

Enter *Start Date*. (Other data is optional)

Click **Save**.

The *Start Date* on the **District Employment** and **District Assignment** tabs are basically effective dates. Districts are not required to enter a person's historical start date or teaching start date in the school or district. Avoid future dates.

NOTE: If you intend to use the value-added components of AIM for scheduling teachers and students and extracting staff assignment information to upload into the OPI TEAMS system, please see the reference guide titled, "Preparing the MT Edition for the TEAMS Extract." The TEAMS reference guide outlines additional staffing information you will want to enter into AIM to successfully export the data for TEAMS.

ADD DISTRICT ASSIGNMENT(S)

Create a **District Assignment** for each school in which the staff member has 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 **New**.

Select a **School** and **Start Date**.

It is recommended to click **Teacher**, **Special Ed**, and **Advisor** for all staff. Clicking the box for **Special Ed** allows this 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.

Newton, Isaac
Gender: M

Demographics | Identities | Households | Relationships | Enrollments | **District Employment**

Save Delete New

Assignments

Employment Assignment Information

School: Cascade High School Department: []
 Start Date: 10/25/2014 End Date: [] Title: []
 Type: [] FTE of Assignment: [] Assignment Code: []

Teacher Special Ed Program Behavior Admin Health Behavior Response Approver
 Advisor Supervisor Counselor Foodservice Exclude Behavior Referral Self Service Approver FRAM Processor

CREATE A NEW USER ACCOUNT

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

Create a new User

This tool will create a new user account for a person.

Newton, Isaac

Username

Password

This field is required.

Homepage: Campus Application

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

Username

Password

Homepage: Campus Application

Usernames must have 6 or more characters and are not case sensitive.

Passwords are case sensitive. The box to the right of the Generate Password box indicates the strength of the new password. Red means weak, yellow means medium and green means strong. Users will not be allowed to save a red or yellow (less than strong) password.

Username

Password

Homepage: Campus Application

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Create a new User

This tool will create a new user account for a person.

Newton, Isaac

Username:

Password: 100%

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
 MTE_all_tools
 Principals
 Read Only
 Records Transfer
 Registrars (Census)
 Special Education Admin
 Special Education Staff
 Sped Read Only
 State Reporting Staff
 Teachers

User Groups can be selected here or under the User Groups tab on the next screen after you click **Create User**.

User Groups can be designed to reflect the job duties of the **User**.

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

Click **Create User**.

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

- **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 and for tracking when an account was disabled.
- **FORCE PASSWORD CHANGE** – allows the System Administrator to force users to select their own passwords upon their first log-in.
- **DISABLED** – Immediately disables the user account. Also, an account is automatically disabled with 5 or more consecutive incorrect log-ins.
- **ALL CALENDARS** – an easier option than selecting all calendar groups for users who should have access to all calendars in all years.
- **HOMEPAGE** – gives the user rights to either the Campus Application or the Parent Portal or Campus Instruction.
- **PRODUCT SECURITY ROLE ASSIGNMENTS** – System Administrator (“God” rights) It is advised that these boxes not be checked unless advised to do so by the OPI staff.

User: inewton
Person: Newton, Isaac

User Account User Groups Tool Rights Calendar

User Account Editor

*Username: Password: [Reset Password](#)

Expires Date: Homepage:

Force Password Change All Calendars
 Disabled

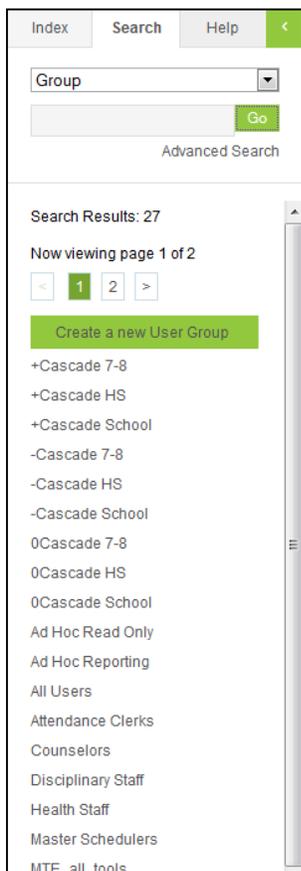
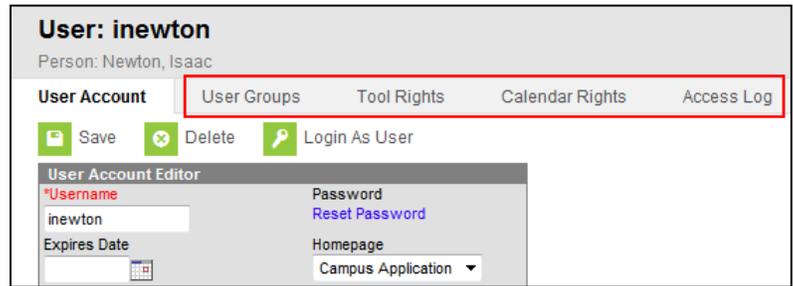
Product Security Role Assignments

Montana Edition
 Student Information System
 Student Information System - Group Assignment
 Student Information System - Login As User

The other tabs (**User Groups, Tool Rights, Calendar Rights, and Access Log**) allow the System Administrator to modify/view information about the User's **Calendar** and/or **Tool Rights**.

It is recommended that individual Tool or Calendar rights NOT 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. Districts may also create they own User Groups.

- **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 create and 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*

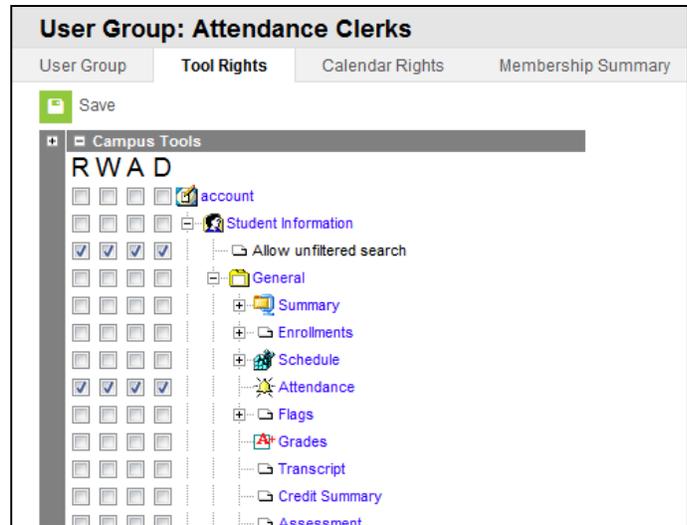
To modify a **User Group**, click on the **Search** tab. Change the field in the *Search for a:* box to **Group**. Click **Go**.

Click on the group name. To modify tool rights group, click on the **Tool Rights** tab.

- R=Read
- W=Write
- A=Add
- D=Delete

Click the boxes to add rights to the group.

Click **Save**.

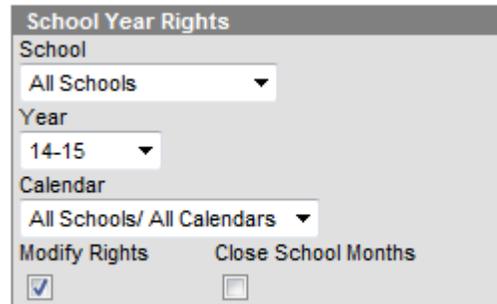
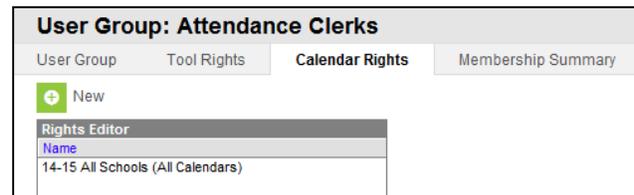


To modify calendar rights, click on the **Calendar Rights** tab.

Click **New** to add a calendar to the group's rights.

Click **Save**.

Note: Checking the **All Calendars** box in the User Account Editor (see above) gives access to all calendars.



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

Users modifications could include a change of school (District Assignment), job duties (from Regular Education to Special Education), or a release from duty (quit, retire). To maintain the integrity of records, do **NOT** delete users, unless they were created in error.

The screenshot shows the 'User Account Editor' for user 'newton'. A red circle with a slash is drawn over the 'Delete' button. The interface includes tabs for 'User Account', 'User Groups', 'Tool Rights', and 'Calendar'. The 'User Account' tab is active, showing fields for Username (newton), Password (Reset Password), Expires Date, Homepage (Campus Application), and checkboxes for Force Password Change, Disabled, All Calendars, and Product Security Role Assignments (Montana Edition, Student Information System, etc.).

The screenshot shows the user profile page for 'Newton, Isaac'. The 'District Assignments' tab is selected, showing a list of assignments for Cascade 7-8 and Cascade High School, both with end dates of (10/25/2014-). The search results on the left show 'Newton, Cheryl' and 'Newton, Isaac'.

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

Click the **Search** tab. Select **All People** from the drop down list.

Enter the *last name* of the **User**.

Click the **District Assignment** tab.

If the user is no longer at the school listed, open the assignment by clicking on the date. Enter an *End Date*.

Click **Save**.

The screenshot shows the 'Employment Assignment Information' tab for user 'Newton, Isaac'. The 'End Date' field is highlighted with a red box and contains the date '1/3/2015'. The 'Start Date' is '10/25/2014'. The 'School' is 'Cascade 7-8' and the 'Department' is 'Title'. The 'Type' is 'FTE of Assignment' and the 'Assignment Code' is blank. The 'Teacher' checkbox is checked.

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Click **New** to enter a new **District Assignment**.

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

Click **Save**.

Newton, Isaac
Gender: M

Demographics | Identities | Households | Relationships | Enrollments | District Employment | **District Assignments**

Save Delete New

Assignments

- Cascade 7-8
 - Cascade 7-8 - (10/25/2014-01/03/2015)
 - Cascade High School
 - Cascade High School - (10/25/2014-)

Employment Assignment Information

School: Cascade School Department: Department
*Start Date: 1/28/2015 End Date: End Date Title: Title
Type: Type FTE of Assignment: FTE of Assignment Assignment Code: Assignment Code

Teacher: **Special Ed** Program Behavior Admin Health Behavior Response Approver
Advisor Supervisor Counselor Foodservice Exclude Behavior Referral Self Service Approver FRAM Processor

Ingalls-Wilder, Laura
Gender: F

Demographics | Identities | Households | Relationships | Enrollments | District Employment | **District Assignments**

Save Delete New

Assignments

- Cascade 7-8
 - Cascade 7-8 - (08/28/2013-)
 - Cascade High School
 - Cascade High School - (08/28/2013-)
 - Cascade School
 - Cascade School - (08/28/2013-)

Employment Assignment Information

School: Cascade 7-8 Department: Department
*Start Date: 08/28/2013 End Date: End Date Title: Title
Type: Type FTE of Assignment: FTE of Assignment Assignment Code: Assignment Code

Teacher: **Special Ed** Program Behavior Admin Health Behavior Response Approver
Advisor Supervisor Counselor Foodservice Exclude Behavior Referral Self Service Approver FRAM Processor

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

Open the current assignment. Check the **Special Ed** box.

Click **Save**.

NAME CHANGES

Click the **Search** tab. *Search for: Staff or All People.* Enter the last name and click **Go**.

If you don't see the Identities tab, go to:

Index tab>Census>People

Click the **Identities** tab. Click **New**.

Enter the new last name (and first or middle name as applicable).

Click **Save**.

NOTE: This is how you would change any of the information that shows in this Identities Screen.

OPTIONAL

Change Username

Click the **Search** tab. *Search for: User.* Enter the (old or new) last name and click **Go**.

Enter the new Username.

Click **Save**

ENDING USERS

Do NOT delete the user information for school district personnel who leave the district.

First, end the user's **District Employment**. Using the **Search** tab, *Search for 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**.

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

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

Click the user's **Username 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).

Check the **Disabled** box is optional, but recommended.

Newton, Isaac
Gender: M

Demographics | Identities | Households | Relationships | Enrollments | District Employment | **District Assignments**

Save Delete New

Assignments

- Cascade 7-8
 - (10/25/2014-01/03/2015)
 - Cascade High School
 - (10/25/2014-)

Employment Assignment Information

School: Cascade High School | Department: | Title: |

*Start Date: 10/25/2014 | **End Date: 3/26/2015** |

Type: | FTE of Assignment: | Assignment Code: |

Teacher Special Ed Program Behavior Admin Health Behavior Response Approver

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

User: newton
Person: Newton, Isaac

User Account | User Groups | Tool Rights | Calendar

Save Delete Login As User

User Account Editor

*Username: newton | Password: | Reset Password

Expires Date: 3/26/2015 | Homepage: Campus Application

Force Password Change | All Calendars

Disabled

Product Security Role Assignments

- Montana Edition
- Student Information System
- Student Information System - Group Assignment
- Student Information System - Login As User

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Fallon, James H
 Grade: 08 DOB: 05/16/2003 Gender: M

Summary **Team Members** Documents Contact Log

Save ~~Delete~~ Find & Link New Team Member Enter New

Team Member Editor

Start Date	End Date	Title	Name
10/27/2014		(SPEDSTAFF)	Ingalls-Wilder, Laura
10/27/2014		(SPEDSTAFF)	Newton, Isaac

Team Member Detail

PersonID
1264

Start Date: 10/27/2014

End Date: 3/26/2015

Title: (SPEDSTAFF)

Last Name: Newton

First Name: Isaac

Agency:

Address:

To remove Team Members from a student's IEP, navigate to the Team Members tab. From the **Index**, select **Student Information/ Special Ed/General** and select the **Team Members** tab.

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*

For further assistance, contact the AIM Help Desk at opiainhelp@mt.gov or 1-888-424-6681.