



CREATING AND MODIFYING USERS

This user guide provides detailed information on how to create new users, modify existing user rights, assigning group rights to users in mass, information on staff name changes, and how to end user access when it's no longer needed.

Before a user account can be created, the user must first exist as a person. Once a person exists in Campus, they can then have a user account created. Refer to the [District Staff Checklist](#) or the [Complete User Guide](#) for assistance in creating people within Infinite Campus.

Note: Update your District Contact Information whenever there is a staff change that affects how the OPI Education Data Collection Team staff communicates with your school/district on Infinite Campus data and collections. It is important to keep this information as accurate and up to date as possible. Email opiainhelp@mt.gov with District Name, Contact Name, Contact Phone, Contact Email, Contact Type (District/School Level), Subject Area (General Ed/SPED/Staff/All), and Contact Priority (Primary/Backup).

User Accounts

PATH: *User Management>User Account Administration>User Account*

Any Person who needs access to the Infinite Campus system for data entry may be assigned a User Account and User Group Rights. It is recommended that individual persons be assigned user accounts, rather than using shared accounts (e.g., System Administrator).

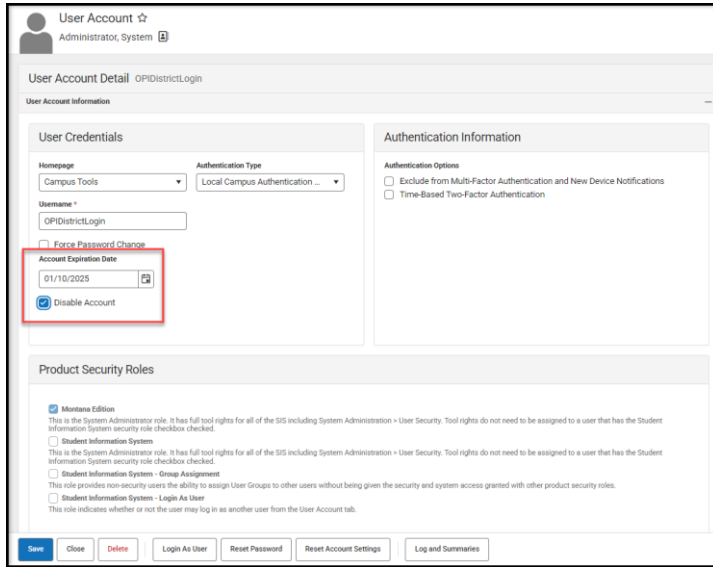
To create a **User Account** (a person/staff record must be created first):

1. Search for a **User**.
2. Click the name under **Search Results**.
3. Click on **New** at the bottom of the screen.
4. User Account Information
 - a. Enter a Username. Usernames must be 6 or more characters and are not case sensitive.
 - b. Enter a password. Passwords are case sensitive and must be strong (indicated by Password Strength – red, yellow, green). Enter password again to verify password. The OPI recommends a generic password to start and the system will prompt the user to enter their own secure password upon initial login (Force Password Change is checked by default).
 - c. If the user is a teacher, change Homepage to Campus Instruction.
5. Product Security Roles – Product Security Roles are universal tools for “super users”. Checking these boxes gives users access to a broad array of tools. This should only be done for System Administrators.
6. User Groups – the OPI recommends giving access to Infinite Campus through user groups. User Groups are role based and may be easily transferred from one user to another.
 - a. Click the User Group on the left to add to the current user's account.

7. Individual Tool Rights and Individual Calendar Rights are not recommended. However, there are certain functions (such as the Combine Person Tool) that require the addition of specific tool rights. Click the plus (+) next to those functions to add individual rights.
8. Click Save

To modify an existing User Account, follow the steps 1-2 to identify the existing user account and steps 5 through 8 to add or remove rights.

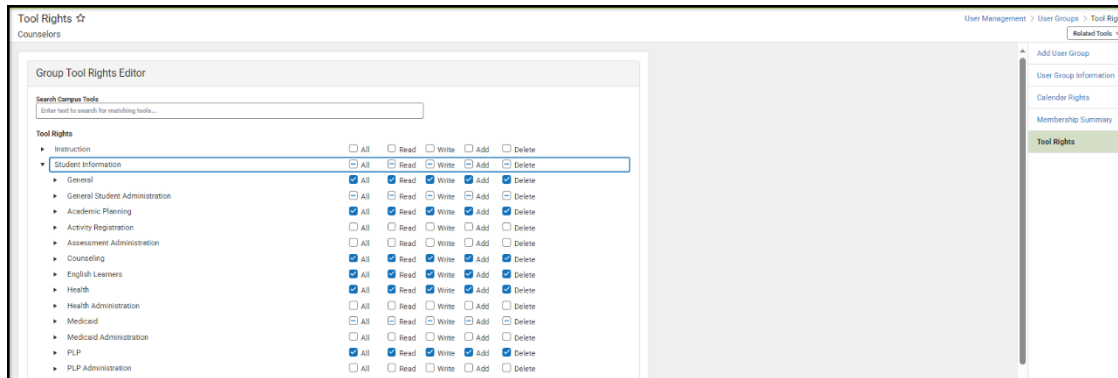
To end user accounts, either enter an Account Expiration Date (ends user access at 11:59 pm on the date entered) or click Disable Account.



User Groups

Some **User Groups** have been created in conjunction with Infinite Campus, to set up core memberships for district users. Districts may also create their own User Groups and assign those groups rights as they determine necessary.

- **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 modifications to IEP's but not tool rights that allow modifications to attendance or User Accounts).



Modifying Existing User Groups

1. Search for a Group.
2. Click the Group name.
3. Click Calendar Rights (for Calendar Groups) or Tool Rights (for User Groups) under Related Tools.
4. Click the boxes to add or remove rights in the group selected.
5. Click **Save**.

To see who has been assigned to a user group, under Related Tools click Membership Summary. Blue is active and red are inactive user accounts.

User Management Reports

PATH: *User Management>Reports*

User Management Reports should be run periodically to monitor who has active user accounts, how accounts are being used, and to ensure that users have correct access.

1. The Product Security Role Report displays a list of users who have been granted Product Security Roles (System Administration).
 - a. Choose a role (CTRL-click or SHIFT-click to select multiple).
 - b. Select Group By and Format options.
 - c. Click Generate Report.
2. Tool and Calendar Right Access lists users who have been granted specific Tool or Calendar rights.
 - a. Select a Tool or Calendar (single select only).
 - b. Select the level of rights (R = Read, W = Write, A = Add, D=Delete – multiple select allowed).
 - c. Choose Output and Format options.
 - d. Click Generate Report.
3. User Group Report provides details about User Groups.
 - a. Choose Report Type.
 - b. Select Format.
 - c. Click Generate Report.