

AIM User Guide:
*Creating and Modifying
Infinite Campus 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.

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.

IT IS IMPORTANT TO USE THE STAFF LOCATOR FUNCTION IN INFINITE CAMPUS FIRST TO SEE IF A USER ALREADY EXISTS IN INFINITE CAMPUS BEFORE CREATING A NEW USER. THIS COULD BE THE CASE IF THE USER WAS FORMERLY EMPLOYED AT ANOTHER SCHOOL OR DISTRICT.

NOTE: *Please be sure to update our [District AIM Contact Form](#) whenever there is a staff change that affects how the OPI AIM staff communicates with your school/district on AIM data and collections. It is important to keep this information as accurate and up to date as possible.*

Creating and Modifying Users

AIM User Guide

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

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FAQ:

Before beginning, consider the following scenarios:

- 1. We have a new secretary in charge of AIM this year. How do I give him/her access to AIM?** Staff members accessing the district's Infinite Campus should have individual User Accounts. Create the new staff member as a Person and *then* create a User Account.
- 2. I have a teacher who is assuming new duties this year. How do I modify his/her user rights?** Modify the District Assignment and the User Group(s) the teacher has access.
- 3. Our school secretary was married over the summer and I need to change his/her name.** Create a new Identity for him/her as well as a new Username, if they so choose.
- 4. My Special Education teacher left at the end of last year. How do I end his/her access and add the new teacher?** Contact [Kristie Sears](#) for further instructions pertaining to Special Education staff. 406-444-0685.

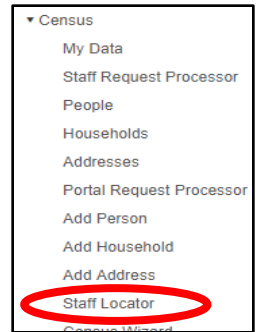


Creating a New Person or Staff Via the Staff Locator in Infinite Campus

PATH: Census > Staff Locator

Users are first created through the **Staff Locator**. It is not necessary to have a specific **School** and/or **Calendar** selected at the top of your Infinite Campus screen.

1. From the **Index**, expand the **Census** and select **Staff Locator**.
2. The Last Name, First Name and Gender are required fields.
3. Select **Search**.
 - A list will appear of potential matches. If no one exists with the last name entered, then the results list will yield "No Person matches found". Proceed with the following. If a match was generated skip to the section below: *If Your Search Yields a Person/Match in the System.*



4. If no match is found, then select **Create New District Staff**.
5. The 'New Staff' window will open, and the **First Name**, **Last Name** and **Gender** should be entered and they are required.
6. Click **Save**.
7. Proceed to **Adding a District Employment Record** on Page 3.

If Your Search Yields a Person/Match in the System:

1. Scroll over the name and make sure the match is the same person. A former district name could be tied to the name so it also helps to ask if they are part of another school district, or if they formerly worked there, etc.
2. Select the name you believe is a match. Enter any addition details in the New Staff tool if necessary.
3. Click **Save**.
4. Proceed to **Adding a District Employment Record** on Page 3.

NOTE: Phone number(s) and/or Email can be entered as well when in the New Staff tool. 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.

Staff Locator

Search for a staff already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to search. To search, you must enter the staff member's Staff State ID, or full legal Last Name, First Name, and Gender. Hover the cursor over the name to view details.

Last Name	smith	Name	Staff State ID	Gender	Birth Date	%
First Name	john	Smith, John K		M	11/22/1988	100
Gender	Male	Smith, John Daniel		M	06/15/1989	100
Birth Date		SMITH, JOHN		M	02/15/1991	100
Middle Name		Smith, John Thomas		M	04/12/1996	100
SSN #		Smith, John	45400	M		100
Staff State ID		Smith, John T		M	12/12/2010	100
		Smith, Jo				
		smith, joh				
		smith, john		M	01/17/1999	100
		smith, john		M		100
		smith, john		M		100
		smith, john		M		100
		Smith, James Coby		M	10/30/1999	67
		Smith, Jonah Everett		M	03/19/1999	67
		Smith, James		M	09/05/2002	67
		Smith, James E		M	03/31/1993	67
		Smith, Jim Lee		M	08/31/1997	67
		Smith, Jonas Paul Edmond		M	09/26/2003	67
		Smith, Jaymz W		M	12/24/2004	67
		Smith, James		M	09/17/2007	67
		Sielinsky, James Lee		M	02/07/2007	67

Staff from district: Molt Elementary, click to add to current district.

Create New District Staff -->



Add a District Employment Record

1. From the **Search** tab, select **All People**.
2. Enter the new staff members last name, the first name. Click **Go**.
3. Click the **District Employment** tab.
4. Click **New**.
5. Enter *Start Date*. (Other data is optional)
6. Click **Save**. Proceed with **Adding a District Assignment**.

*The *Start Date* on the **District Employment** tab is basically the users effective date. Districts are not required to enter a person's historical start date or teaching start date in the school or district.



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.

1. Navigate to the **District Assignments** tab. This can be done by
2. Click **New**.
3. Select a **School** and **Start Date**.
4. Check the box next to the most appropriate position(s) for this staff. I.e., For Teachers, check the box next to Teachers. For Advisors, check the box next to Advisor, etc. Contact [Kristie Sears](#) for further instructions pertaining to Special Education staff. 406-444-0685.
5. The **State Assignment Code** is also recommended to help with TEAMS data entry.
6. Click **Save**.
7. Repeat for each school the staff member has an assignment in.

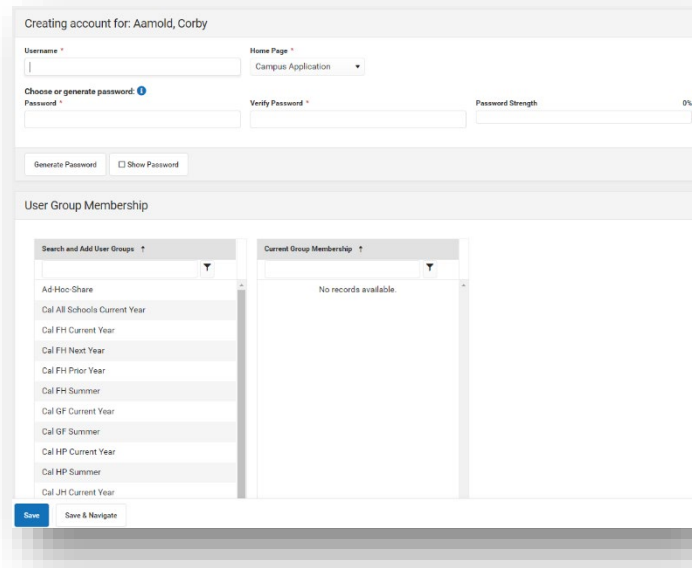
NOTE: You may wish to add additional *Personal Identifiers* and *Personal Contact Information* for staff members. Districts may also choose to enter a **Local Staff Number** and a **Teacher's Staff State ID**, aka **SEID** or **License number**. This can be done under the Demographics Tab under the Person Identifiers and Personal Contact Information sections. This may be especially helpful 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, "[TEAMS in the MT Edition](#)." The TEAMS reference guide outlines additional staffing information you will want to enter in AIM to successfully export the data for TEAMS.



Create a New *User Account*

Any Person who needs access to the Infinite Campus system for data entry can be assigned a User Account and User Group Rights.

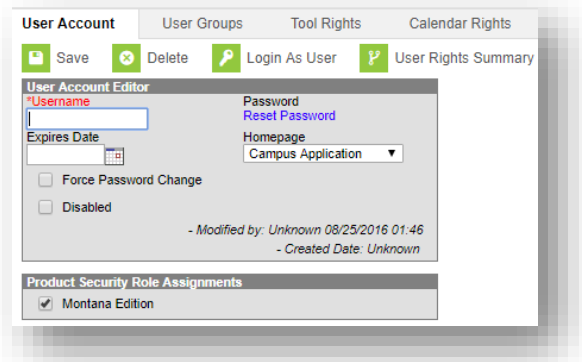
- To create a **User Account** which is done **AFTER** a Person/Staff has been created:
 - Click on the **Search** tab. In the *Search criteria* box, select **User**.
 - Type the *Last Name, First Name* of the person you created and click **Go**.
 - Click the name under **Search Results**.
 - Enter a *Username* and *Password*. **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.*
 - User Groups** can now be added to the user by here or under the **User Groups** tab on the next screen after you click **Save**. **User Groups** can be designed to reflect the job duties of the **User** to assign them rights. (See pages 5/6.)



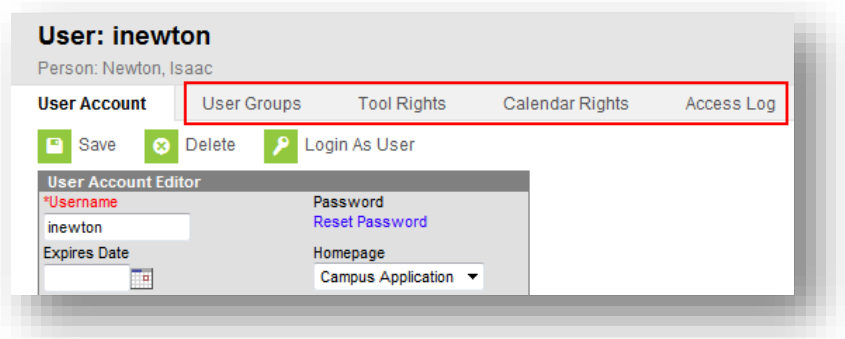
Once the New User Account is Created:

In addition to changing the *Username* and *Password*, a **System Administrator** can use the following tools which will appear under the users **User Account Tab**:

- EXPIRES DATE** – the User Account will expire at midnight on the date entered this box. This tool is good for setting access to a limited period 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.
- HOMEPAGE** – gives the user rights to either the Campus Application or the Parent Portal or Campus Instruction.
- PRODUCT SECURITY ROLE ASSIGNMENTS** – System Administrator (This is a 'Super User' with additional privilege levels) It is advised that these boxes not be checked unless advised to do so by the OPI staff.



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



It is recommended that individual Tool or Calendar rights NOT be added to any User Account, instead, use User Groups to assign rights (see below).

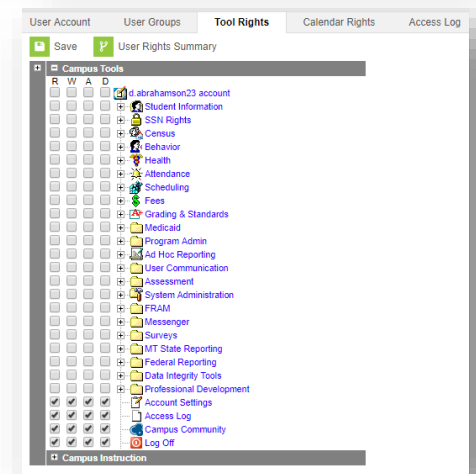
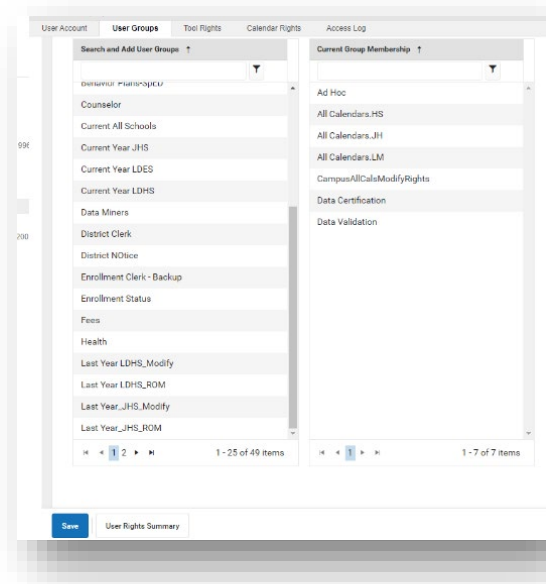


User Groups

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.

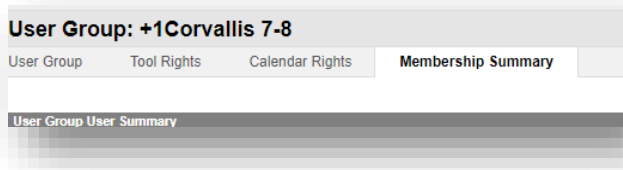
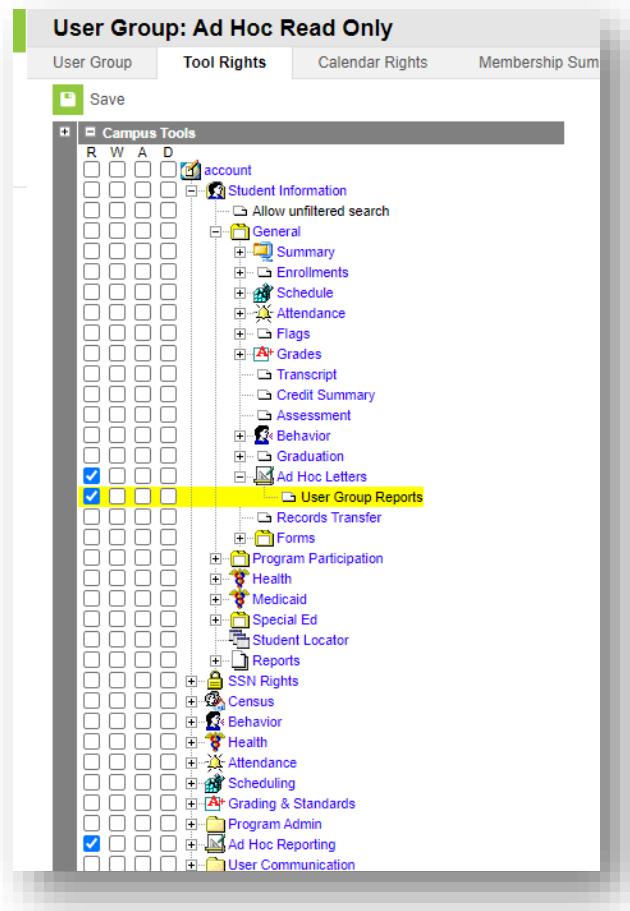
- **Calendar Groups** allow a User access to a specific school in a specific year. The minus (-) symbol is last year's calendar, the plus (+) symbol is next year's calendar, and the numeral zero (0), is the current year's calendar.
- **Tool Rights** give access to tools that help a User accomplish the specified task (e.g., Special Education Staff have tool rights that allow them to modify IEP's, but not tool rights that allow them to take attendance or modify User Accounts).

NOTE: The OPI recommends that districts create and modify groups, instead of assigning tool rights to individual users. Modifying groups gives all Users with access to that group the same rights and allows for easy control over rights users have.

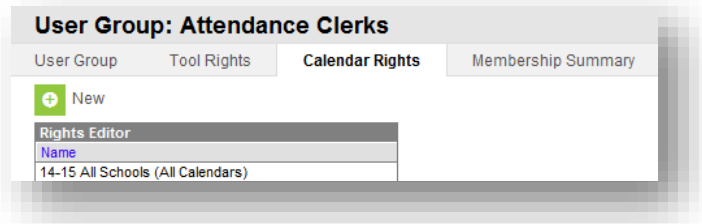


- **To modify an existing User Group:**
 1. Click on the **Search** tab, select **Group** from the *search criteria box*.
 2. Click **Go**. Click on the group name. To modify tool rights of the group, click on the **Tool Rights** tab.
 3. Click the boxes to add or remove rights in the group selected. The fields are as follows:
R=Read
W=Write
A=Add
D=Delete
 4. Click **Save**.

NOTE: Adding rights to a user group adds rights to all sub-groups below. Expand tool groups to view all rights. Changing or adding rights to a Group, changes the rights to all Users assigned to that Group. To view all the Users assigned to a Group, click on the **Membership Summary** tab.
***Changing SPED Staff and/or SPED Admin is not recommended.**



- **To modify calendar rights:**
 1. click on the **Calendar Rights** tab.
 2. Click **New** to add a calendar to the group's rights. This is usually done by each school name allowing the user to have access to that particular school, omitting those schools they do not require access to.
 3. Click **Save**.

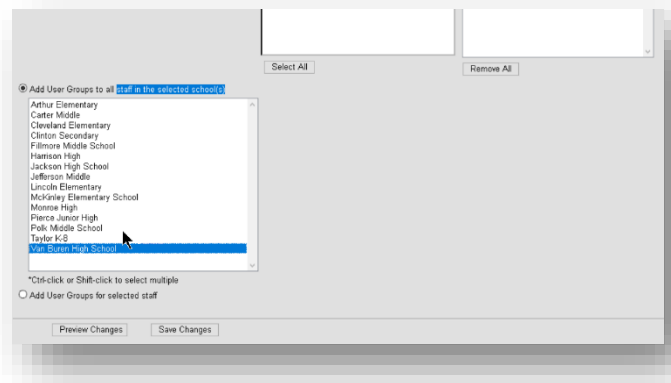
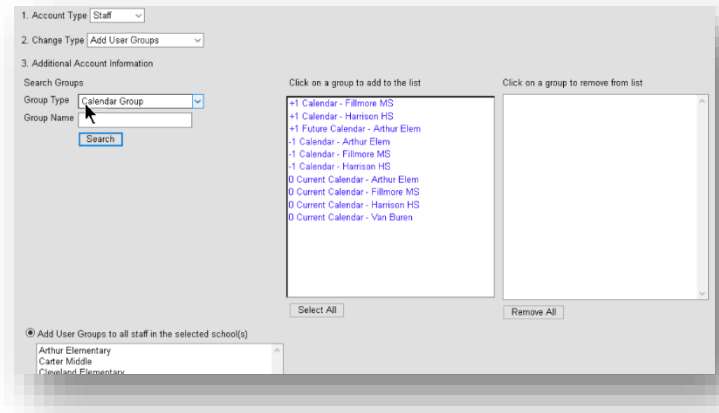


- **To add User Group rights to staff members *in mass*:**

*If you create a new Group, you may wish to add the Group to certain staff or schools in mass, instead of adding the Group to each User one by one. **Warning: This cannot be undone.***

Proceed with caution.

1. Select the **Index** tab.
2. Select **System Administration**.
3. Select **User Security**.
4. Select **User Preference Management**.
5. Select **User Account Batch Wizard**.
6. Select **Staff** from the **Account Type** box.
7. Select **Add User Groups** from the **Change Type** box.
8. Select the **Group Type** depending on what type of Group (Calendar Right Group, Tool Right Group, Mixed).
9. Enter the name of the Group in the **Group Name** box.
10. From the list of Groups generated, click on the Group you wish to add to the Users. They will appear in the box to the right.
11. Next, you can choose to either: **Add User Groups to all staff in the selected school(s)** by selecting that option and then selecting the school from the list. Or you can choose to **Add User Groups for selected staff** by selecting that option, and then searching for the staff members by name, role, title, etc. and adding their names to the list of persons receiving the Group rights.
12. Click **Save Changes**.

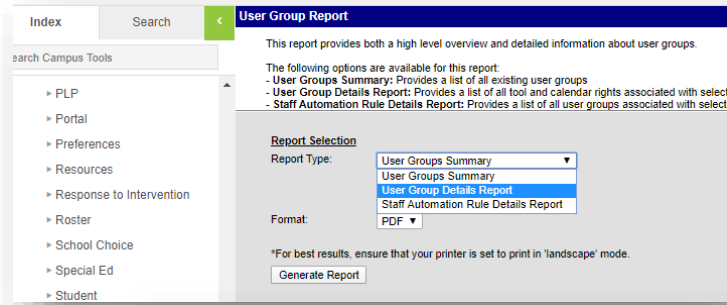


- **To search what Users are assigned to specific Groups, or to see the rights a User has assigned to them:**

1. Select the **Search** tab and select **Group** under the *search criteria* box.
2. Select a **Group** from the list generated to the left.
3. Navigate to the **Membership Summary Tab**. This give you a list of all the **Users** assigned to this particular Group. *This feature is helpful when you may know the User Group and the rights associated with it and want to see if a user has access to those rights.*
4. Select the name from the **User Group User Summary** to open their **User Account** details.
5. From the top tabs, select **User Groups**. This will show you what current Groups the User is assigned to. You can add or remove groups here as well, click **Save** after changes are made. You can also view **Tool Rights** and **Calendar Rights** from this window.

- To search what Group assigns a certain tool right:

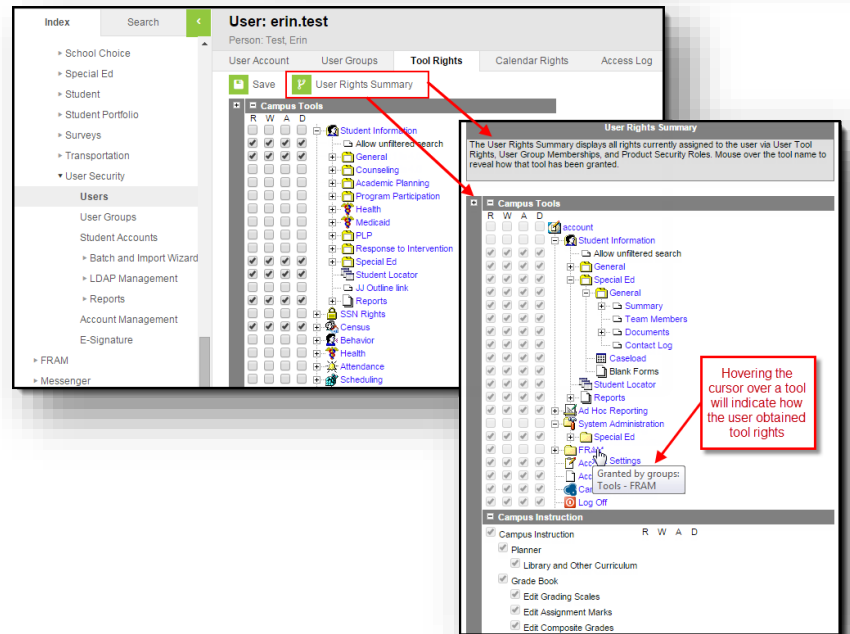
1. Select the **Index** tab.
2. Select **System Administration**.
3. Select **User Security**.
4. Select **Reports**.
5. Select **User Group Report**.
6. Select **User Group Details Report** from the **Report Type** box.
7. Select the **User Groups** from the list that appears, of which you wish to view the rights.
8. Click **Generate Report**. A report will appear as pictured to the right, listing every right associated with the Groups you selected.



0822 Cornwallis K-12 Schools District		User Group Details			
Generated on 03/02/2020 11:17:44 AM Page 1		Report generated for Administrator, System			
Group Name: DOSuperintendent					
Tool Rights		Read	Write	Add	Delete
Access Log		X			
Account Settings		X			
Ad Hoc Reporting		X	X	X	X
Ad Hoc Reporting > Batch Queue		X	X	X	X
Ad Hoc Reporting > Batch Queue > Set Task Expiration		X	X	X	X
Ad Hoc Reporting > Batch Queue > Set Task Priority		X	X	X	X
Ad Hoc Reporting > Data Analysis > Pivot Designer		X	X	X	X
Ad Hoc Reporting > Data Analysis > Pivot Designer > Data Warehouse: Allow live data as source		X	X	X	X
Ad Hoc Reporting > Data Analysis > Pivot Designer > Group Rights		X	X	X	X
Ad Hoc Reporting > Data Export		X	X	X	X
Ad Hoc Reporting > Data Export > Data Warehouse: Allow live data as source		X	X	X	X
Ad Hoc Reporting > Data Viewer		X	X	X	X
Ad Hoc Reporting > Filter Designer		X	X	X	X
Ad Hoc Reporting > Filter Designer > Data Warehouse: Allow live data as source		X	X	X	X
Ad Hoc Reporting > Filter Designer > Export Filters		X	X	X	X
Ad Hoc Reporting > Filter Designer > Pass-through SQL Filters		X	X	X	X
Ad Hoc Reporting > Filter Designer > Query Wizard Filters		X	X	X	X
Ad Hoc Reporting > Filter Designer > Selection Editor Filters		X	X	X	X
Ad Hoc Reporting > Filter Designer > State Owned Filters		X	X	X	X
Ad Hoc Reporting > Letter Builder		X	X	X	X
Ad Hoc Reporting > Letter Builder > Data Warehouse: Allow live data as source		X	X	X	X
Ad Hoc Reporting > Letter Designer		X	X	X	X
Ad Hoc Reporting > Letter Designer > User Group Formats		X	X	X	X

- To search how a User was granted certain rights if the User Group is unknown:

1. Select **Search** tab.
2. Select **User** from the search criteria box.
3. Search for the User by *last name, then first*.
4. Click **Go**.
5. Select the User from the list by their *user ID* which should appear under their name.
6. Select **Tool Rights** from the top bar.
7. Select **User Rights Summary**.
8. A **User Rights Summary** reports window will open. Hovering your cursor over a tool will indicate how that user obtained that right. By listing the origin of that right, you can know for sure which rights to assign someone else if you are unsure of which groups assign which rights.





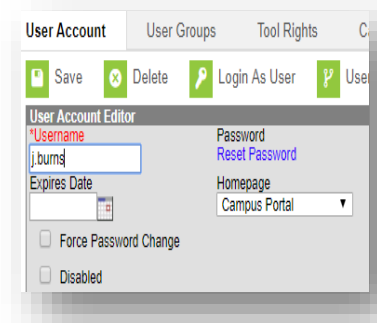
Modifying Users

User 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 staff may be listed on an IEP, which is a legal document that needs to maintain any historical staff data.** Instead, enter an **Expires Date** and check the **Disabled** box. Contact [Kristie Sears](#) for further instructions pertaining to Special Education staff. 406-444-0685.

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

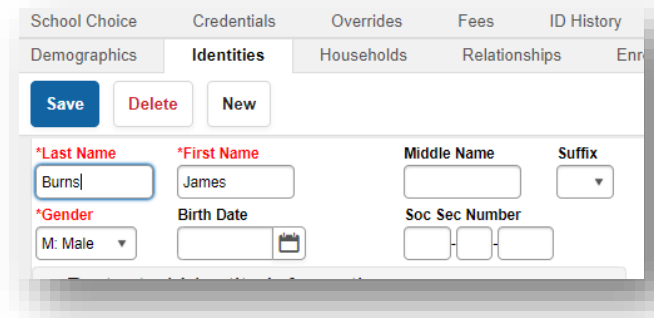
1. Click the **Search** tab. Select **All People** from the drop-down list.
2. Enter the *last name, first name* of the **User**, select the name from the search results.
3. Click the **District Assignment** tab.
4. If the user is no longer at the school listed, open the assignment by clicking on the date. Enter an **End Date**.
5. Click **Save**.
6. Click **New** to enter a new **District Assignment**.
7. Select the correct **School**.
8. Click **Save**.

- To change a teacher from **Regular Education** to **Special Education**, Contact [Kristie Sears](#) for further instructions pertaining to Special Education staff. 406-444-0685.



Name Changes

1. Click the **Search** tab.
2. *Search for: Staff or All People.*
3. Enter the last name and click **Go**.
4. Select the person from the search results.
5. Click the **Identities** tab.
6. Click **New**. Enter the new last name (and first or middle name as applicable). Do not modify the current Identity name, create a new one.
7. Click **Save**.
8. Depending on how you structure your usernames, there may also be a change necessary to the Username. For example, if Jane Smith changes her last name to Doe and had a username JSmith, then her Username must be updated to JDoe etc.
9. Click the **Search** tab. *Search for: User.* Enter the (old or new) last name and click **Go**.
10. Enter the new Username. Click **Save**.

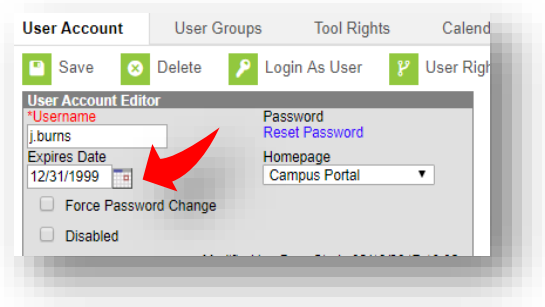




Ending Users

Do **NOT** delete the user information for school district personnel who leave the district. *The staff may be listed on an IEP, which is a legal document that needs to maintain any historical staff data.*

1. First, end the user's **District Employment**.
2. Using the **Search** tab, *Search for All People*.
3. Enter the user's **last name**.
4. Click **Go**.
5. Select the person from the search results.
6. On the **District Employment** tab, open the current **Employment Record**.
7. Enter an **End Date** (the last day of employment for this user).
8. Click **Save**.
9. A prompt will appear, asking to end all open assignments. Click **Yes**.
10. 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.
11. The final step is to expire the **User Account**.
12. Click the **Search** tab. *Search for User*. Enter the user's **last name**, click **Go**.
13. Click the user's **Username (in bold)**.
14. On the **User Account** tab, enter an **Expires Date** (the last date of employment in the district).
15. Click **Save**. The **User Account** will no longer be active as of midnight on the date selected (if using a future date).
16. Checking the **Disabled** box disables the user account immediately.



Adding/Modifying/Removing AIM District Contacts in Contacts Database

In addition to user modifications within Infinite Campus, the OPI maintains a [database](#) with the name, phone number, and email for each district's AIM Contact. It is up to the district to decide who the AIM Primary Contact is. **NOTE: Please be sure to update the [District AIM Contact Form](#) whenever there is a staff change that affects how the OPI AIM staff communicates with your school/district on AIM data and collections. It is important to keep this information as accurate and up to date as possible. *The OPI mainly works with the main AIM Primary Contact when assisting districts with their student data. The districts' AIM Primary Contact is who the OPI relies on for being the liaison between the district and the state.**

This link will take you to the [District AIM Contact Update Form](#) on the AIM website. Or:

1. Go to: opi.mt.gov
2. Scroll over the **Leadership** Tab.
3. Select **AIM- Achievement In Montana** under **Data & Reporting**.
4. Scroll down to find the **District AIM Contact Update Form** link.
5. File out the form and click **Submit**.

For more information, contact the AIM Help Desk at 1- 877-424-6681 or

[Submit an AIM Help Desk Ticket](#)