ProgressBook StudentInformation

Security Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
10/17/14	Entire doc	Update screenshots and breadcrumb trail
06/27/13	Create New StudentInformation Users	Clarified Employee # field
1/22/13	Create New StudentInformation Users	Added step by step
1/12/10	Create Staff Impersonations for User	10.2.0 – Impersonations now copied in SYI

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- The StudentInformation Security system is used to define access to the various features in the StudentInformation system.

- When a new user is created, they start with no access to StudentInformation. They are able to log into the system, but no items are available in the sitemap.

- Roles are used or created to define access to specific nodes or branches of the site map.

  - Users are given access to StudentInformation by being granted one or more role/school combinations. The role defines the access while the school defines where that access is given.
  - These role/school combinations can be assigned directly to the user account or can be applied to the user account through their membership in one or more groups with direct or inherited role/school assignments.

Follow these steps to set up and use the StudentInformation Security functionality. **See Security End User Documentation for detail.**

☐ **Determine Type of Security –** Determine whether you will use Centralized or Decentralized (or a combination) Security.

Centralized – All security administration is done at the district level by a centralized and usually small number of people.

Decentralized – Moves the security administration to the building level.

Combination – Some of the security administration takes place at the district level (centralized) while certain other tasks take place at the building level (decentralized).

☐ **Determine Type of Staff Members and Access** – Determine what types of staff members you have and the type of access you want them to have in StudentInformation.

☐ **Convert DSL Users to DASL** – Convert existing DSL Users to DASL Users; Pay special attention to the Administrative School and the Default School.

Navigation: StudentInformation – Management – Security – DSL to DASL

DSL TO DASL

Search For Users To Move

Last Name:		First Name:	
Domain:	⌄	Username:	
Email Address:		Mark Users As: ☐	

Search

☐ **Review and Create Roles** – Review the existing pre-defined Roles and create new Roles as needed.

Navigation: StudentInformation – Management – Security – View Users – User Roles tab

OR

Navigation: StudentInformation – Management – Security – View Roles – Add New Role button or edit (pencil)

☐ **Review Role Access** – Review the Sitemap Access for the existing pre-defined Roles and your new Roles.

☐ **Review and Create Groups** – Create Groups as needed for your StudentInformation Users. Examples of Groups might be teachers, administrators, secretary, etc.

☐ **Assign Role/School Combinations to Groups** – Assign the Role and the School combination to each Group to specify what screens and functions that Group has access to.   A group is a collection of users and other groups. Groups can be used for collection purposes, assignment of job functions, and/or assignment of security access.

Navigation: StudentInformation – Management – Security – View Groups – Click edit (pencil) – Group Roles tab

☐ **Create New StudentInformation Users**

1. Navigate to : ***StudentInformation » Management » Security » View Users***

2. Click [Add New User] .

3. In the **Username:** field, enter the user name you want to assign to the user. This is the name the user will use to log in to StudentInformation.

4. In the **First Name:** field, enter the user's first name.

5. In the **Last Name:** field, enter the user's last name.

6. In the **Employee Number:** field, enter the user's employee number. The field only accepts numeric characters. The employee number is optional and currently has no functionality in StudentInformation.

7. In the **Domain:** drop-down list, select the domain in which the user's account exists.
   a. ***Note:*** *If the account is Windows authenticated (Active Directory), the domain is the same name as the Windows domain. If the account is ProgressBook authenticated (Non-Active Directory), the domain is defined in CentralAdmin. For more information, refer to ProgressBook CentralAdmin User Guide*
   b. ***Note:*** *Once the user record is saved, you cannot change the user's domain. If you need to change the user's domain at a later time, contact your technology center.*

8. In the **Email Address:** field, enter the user's email address.
   a. ***Note:*** *Ensure you enter the correct and unique email address for the user as this is the account to which their StudentInformation password is emailed.*

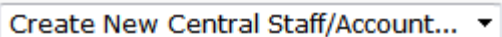9. Ensure the **Is Active:** checkbox is marked.

10. In the **Administrative School:** drop-down list, select the user's administrative school. The Administrative School is the school that can edit the user's security account. If the Administrative School is set to the District, then only users with district level access to the security pages will be allowed to edit the account.

11. In the **Default School:** drop-down list, select the school or school district that is in context by default when the user logs in to StudentInformation.

12. Click [Save User] .
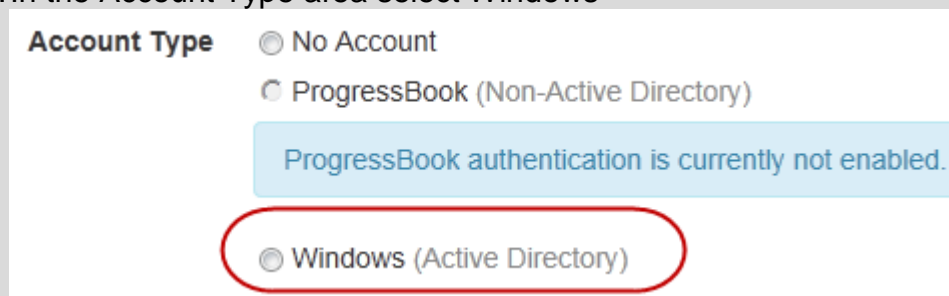
13. Now click the **Link to Central:** checkbox.

14. In the **Account Selection:** dropdown select
    [Create New Central Staff/Account... ▼] .

15. Click [Save] .

16. The page will refresh and Central will displayed.

17. In the Account Type area select Windows

Account Type
- ○ No Account
- ○ ProgressBook (Non-Active Directory)

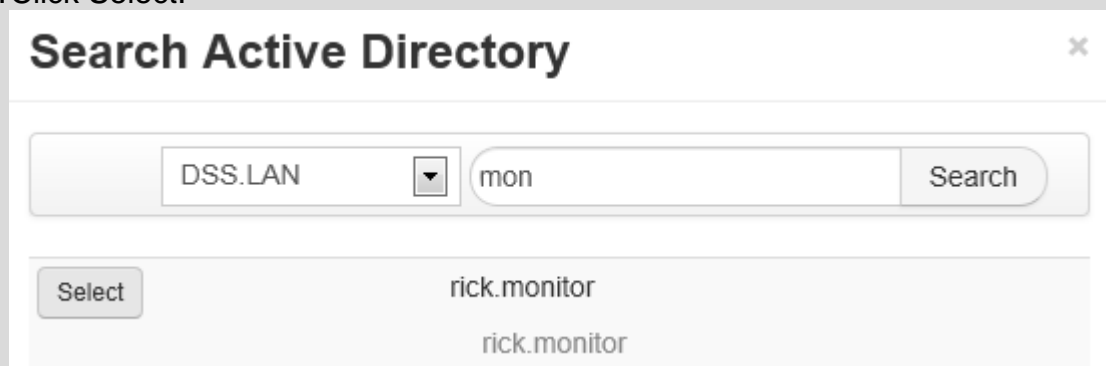   ProgressBook authentication is currently not enabled.

- ○ Windows (Active Directory)

18. The page refreshes and an area named **Windows Account** appears.
19. Click Select... .
20. In the select a domain... ▼ dropdown choose the appropriate domain and click Search .
21. Choose the appropriate Active Directory account from the available list. If you do not see the account you are looking for then enter a couple of letters from the account first or last name and search again.
22. Click Select.

Search Active Directory   ✕

| DSS.LAN ▼ | mon | Search |

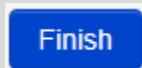| Select | rick.monitor |
| | rick.monitor |

23. Click Next .

24. Enter the User's First Name, Last Name, and Email Address in the Create Staff – Profile section.

Create Staff - Profile Information

First Name	Rick
Middle Name	
Last Name	Monitor
Email Address	rick.monitor@noacsc.org

25. If the user you are adding is also a security administrator for your district select ☑ Staff Admin in the User Roles section, otherwise leave it unchecked.

26. Click Finish .

27. The following will display:

Security - User: rick monitor

The selected User was successfully updated

User	User Roles	Staff Member Impersonations	User Groups	Group Memberships	Reset Password

Username: rick.monitor

First Name: rick   **Last Name:** monitor

Employee Number: **Domain:** DSS

Email Address: rickmonitor@noacsc.org   **Is Active:** ☑

Administrative School: Ada Ex Vill SD   **Default School:** ADA HIGH SCHOOL

Link to Central: ☑

Username: rick.monitor
Domain: DSS.LAN
Account Type: Windows

Save

☐ **Assign Role/School Combinations to Users** (optional) – Assign the Role and the School combination to individual Users as needed to specify what screens and functions that User has access to.

☐ **Put Users into Groups** – Put each User into their appropriate Group(s); A User can belong to more than one Group.

☐ **Review and Create Staff Members** – Staff Members will be brought over from SIS; Review and create new Staff Members as needed. The View/Edit Staff Member Schools defines what assignments this staff member has for the various school and school years.

Navigation: StudentInformation – Management – Security – View Staff Members – Add New Staff Member button

View Staff Members

| Staff Member Name: | | Assigned Username: | | | Show Active Only: ☑ | Search |

Add Staff Member To: Ada Ex Vill SD ▾ Go

		Last Name	First Name	Staff Code	District	Domain	Username	Active
✕	✏		KELLY		Local SD	.LAN		💡
✕	✏	.	CAROL		: Local SD	.LAN	.	💡

☐ **Create Staff Impersonations for Users** – Create Staff Impersonations for each User as needed for security purposes. Staff impersonation is the ability in StudentInformation for a user to be able to do tasks as if they were the staff member that they are impersonating. Users can also impersonate all staff members in the school if so specified. Administration staff uses this option most frequently. **IMPORTANT!** As of DASL v10.2.0, Staff Member Impersonations are now copied from year to year as part of the School Year Initialization process. Once Staff Member Impersonations are entered for a user, they wil be carried on to following years as part of School Year Initialization.

Navigation: StudentInformation – Management – Security – View Users – Click edit (pencil) – Staff Member Impersonations tab – click Add button

Security - User:

| User | User Roles | Staff Member Impersonations | User Groups | Group Memberships | Reset Password |

Is Vendor: ☐

[Add]

		School	School Year	Staff Member	Permissions
✕	✏	HIGH SCHOOL	2014	All	Full
✕	✏	HIGH SCHOOL	2014	All	Full
✕	✏	HIGH SCHOOL	2014	All	Full
✕	✏	. HIGH SCHOOL	2014	All	Full
✕	✏	HIGH SCHOOL	2014	All	Full
✕	✏	High School	2014	All	Full
✕	✏	CAREER CENTER	2014	All	Full
✕	✏	. School	2014	All	Full

[Return To View Users Page]

Security - User:

| User | User Roles | Staff Member Impersonations | User Groups | Group Memberships | Reset Password |

Is Vendor: ☐

School: HIGH SCHOOL
School Year: 2014-2015
Staff Member: All Staff ▾

Available Permissions

Full
Fee Collect
EZ Query
Attendance
Marks

← →
« »

Selected Permissions

Save   Cancel

Return To View Users Page

☐ **Associate Staff Members to Users** – Associate a single Staff Member to a specific StudentInformation User for security purposes. Each district should create one staff member record for each member of his or her staff. Most schools and districts will also provide each of their staff members with a user account to access StudentInformation. The intent of the View/Edit Staff Member Associations page is to associate a User account with a Staff Member. Once such an association is created, the user account will have access to perform any task as that staff member that they have been given access to on the site map.

Navigation: StudentInformation – Management – Security – View Staff Member Associations – Filter button – click magnifying glass