User Account Batch Wizard

Last Modified on 09/26/2025 9:10 am CDT

Classic View: *System Administration > User Security > User Preference Management > User Account Batch Wizard*

Search Term: *User Account Batch Wizard*

The User Account Batch Wizard allows users to batch create student and staff user accounts using the census email address or a username pattern, enable student and staff user accounts, disable student and staff user accounts, force a password reset for student and staff user accounts, and add or remove user groups for user accounts en masse.

Accounts can be modified for all students or staff within a selected school(s) or for specific users. You can also preview the changes that will be made prior to initiating modifications within Campus.

This article includes the following topics:

- Tool Rights
- Enabling Student and Staff Accounts
- Creating Student Accounts
- Creating Staff Accounts
- Disabling Student and Staff Accounts
- Forcing a Password Change
- Adding User Groups to Staff Accounts
- Removing User Groups to Staff Accounts
- Informing Users of Newly Created User Accounts

This tool does not feature the ability to delete user accounts en masse. This option is not available due to the dangers mass deleting user accounts can introduce throughout Campus. **Instead of deleting accounts, users are encouraged to disable them.** If users have forgotten their account usernames and/or passwords, they are encouraged to use the Forgot Your Username? and Forgot Your Password? recovery options found on the Campus login page.
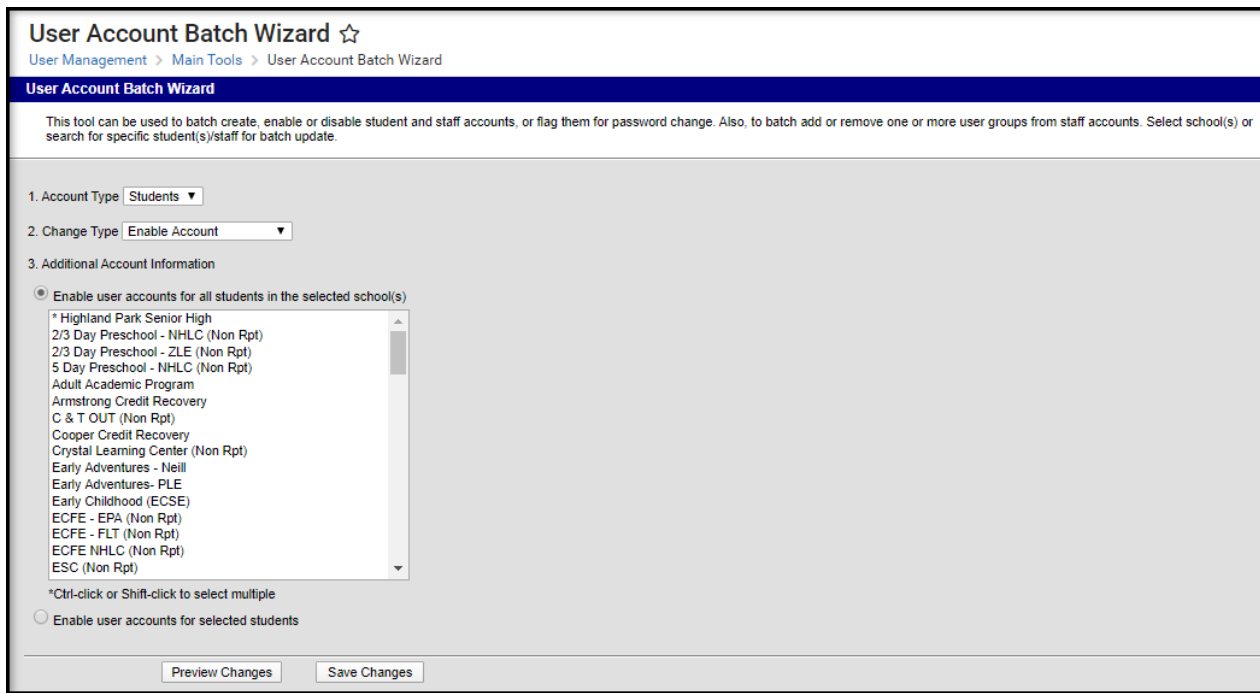
Image 1: User Account Batch Wizard

Tool Rights

PATH: *System Administration > User Security > Users > Product Security Roles > Student Information System*

In order to access the User Account Batch Wizard, you must be granted the Student Information System Product Security Role.
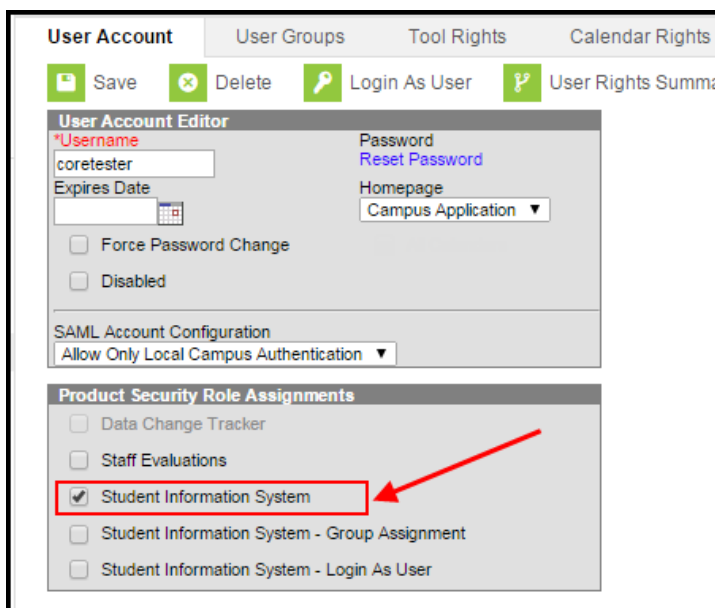

Image 2: Assigning the Student Information System Product Security Role

Enabling Student and Staff Accounts

The Enable Account option allows you to enable user accounts for all students or staff within a school(s) or for specific set of users. See the following sections below for more information.

- Enable User Accounts for All Students or Staff in a Selected School(s)
- Enable User Accounts for All Selected Students or Staff

Image 3: Enabling Accounts

Enable User Accounts for All Students or Staff in a Selected School(s)

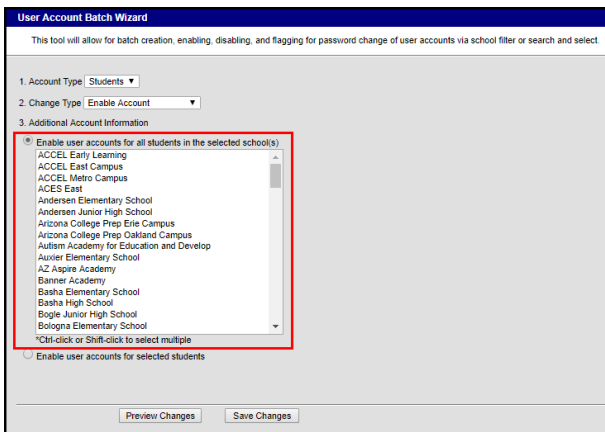To enable all user accounts for all students or staff within a selected school(s):

1. Select an **Account Type**.
   - **Students** - Select this option to enable student accounts within the selected school(s).
   - **Staff** - Select this option to enable staff accounts within the selected school(s).
2. Select a **Change Type** of 'Enable Account'.
3. Mark the **Enable user accounts for all students in the selected school(s)** OR **Enable user accounts for all staff in the selected school(s)** radio button.
4. Select which school(s) will have user accounts enabled. To select multiple schools, hold the CTRL button while selecting each school.
5. To preview a list of all user accounts that will be enabled, click the **Preview Changes** button. A report will appear in CSV format.
6. To initiate the enabling of student or staff user accounts, click the **Save Changes** button. A

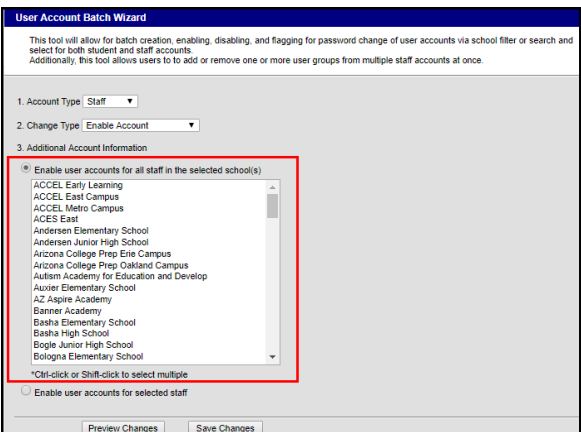report will appear in CSV format, detailing all user accounts enabled (see Image 6).

Student Accounts - Accounts will be enabled for students who currently have a disabled user account and have a current or future enrollment record in the selected school(s).

Staff Accounts - Accounts will be enabled for staff members who currently have a disabled user account and have a current district assignment record in the selected school(s).

Student Accounts	**Staff Accounts**

Enable User Accounts for Selected Students or Staff

To enable user accounts for a specific student or staff:

1. Select an **Account Type.**
   - **Students** - Select this option to enable specific student accounts within the selected school(s).
   - **Staff** - Select this option to enable specific staff accounts within the selected school(s).
2. Select a **Change Type** of 'Enable Account'.
3. Mark the **Enable user accounts for selected students** OR **Enable user accounts for selected staff** radio button.

4. Enter search criteria for the student or staff member (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

   Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each person who will have their user account enabled. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.

6. To preview a list of all user accounts that will be enabled, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the enabling of student or staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts enabled (see Image 6).

Student Accounts - Accounts will be enabled for selected students who currently have a disabled user account and have a current or future enrollment record.

Staff Accounts - Accounts will be enabled for selected staff members who currently have a disabled user account and have a current district assignment record in the selected school(s).

Student Accounts	Staff Accounts

Below is an example of the CSV report that will generate once the **Save Changes** button is selected (Image 4).

Image 4: Example of the Enabled Accounts Report

Creating Student Accounts

The Create Account option allows you to create user accounts for all students within a school(s) or for specific students. Options are available for determining how username and passwords are automatically created, as well as the default homepage (Campus Portal, Campus Student).

▶ Click here to expand...

See the following sections below for more information about setting up each option:

- Username
- Password
- Homepage
- Authentication Type
- Create User Accounts for All Students in a School or Select Students

When using the **Create Account** option, accounts will only be created for students with a current or future enrollment record who do not have an existing user account within the district. If the student transfers between schools in the same Campus district, they will retain the same student account.

Image 5: Creating Student Accounts

Username
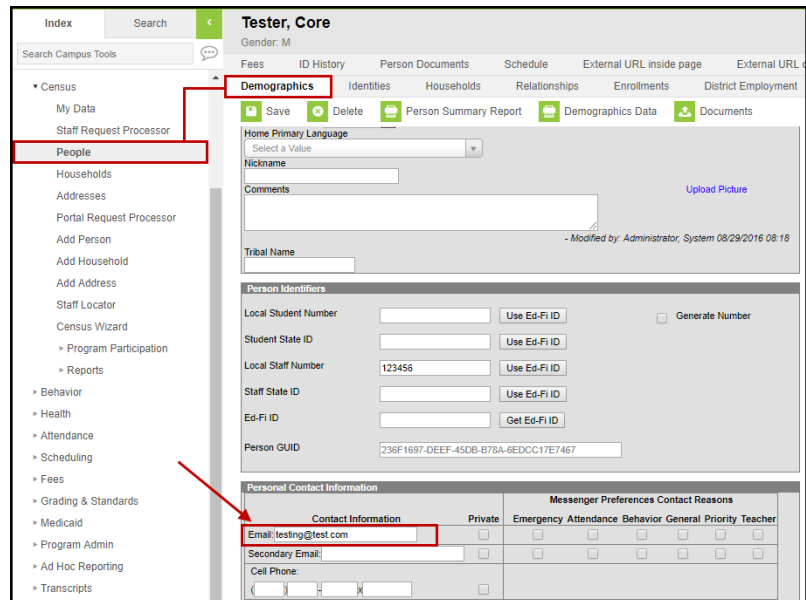
Usernames are generated based on two available options: the email address of the student (existing on the Demographics tab) or a pattern used to create usernames for each account. The table below describes each option.

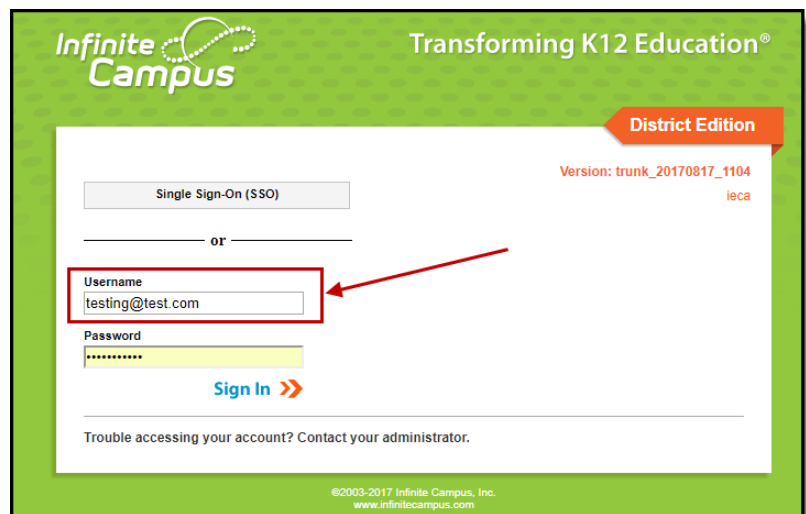| Field	Description
Use census email as account username 	Selecting this option means usernames will be generated to match the email address listed in the **Email** field on the student's Demographics tab (see below). If you would like to remove the domain from usernames generated from a student's census email address, mark the **Exclude email domain in username** checkbox. For example,

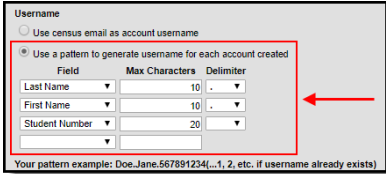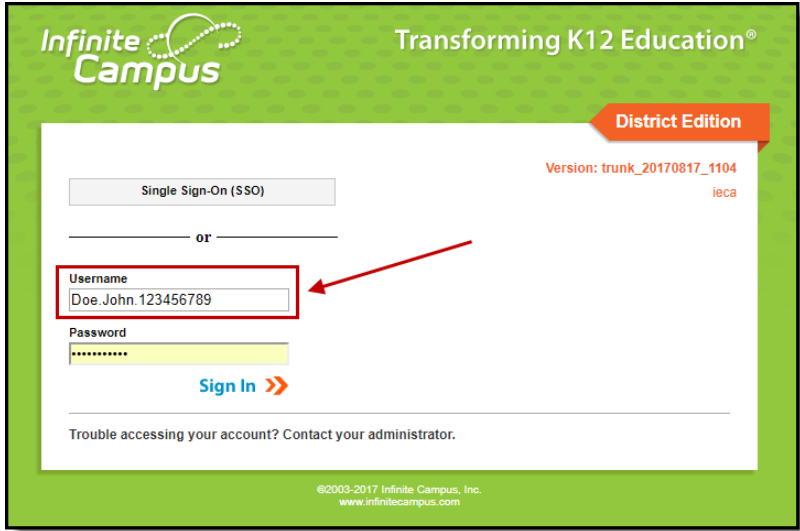| Field	Description
	if the user's email address is 'joetester@email.com', his generated Campus username would be 'joetester'. Usernames created via email account do not qualify for collision resolution. If the email address is missing or is already taken by an existing user account, the user account will not be created. Once the user account has been created, the user will enter their email address as their username for logging into Campus via the Campus login screen (see below).

Field	Description
Use a pattern to generate username for each account created 	Selecting this option allows you to designate a pattern for how usernames are generated for each account. For example, using the criteria entered in the picture to the left (Last Name, First Name, Student Number), if the student's name is John Doe with a student number of 123456789, he would log in with a username of Doe.John.123456789

Authentication Type

The Authentication Type determines how users of the generated accounts will log into Campus.

> This option will only appear if LDAP or SAML are configured in Campus. If hidden, the default authentication type is Local Campus Authentication.
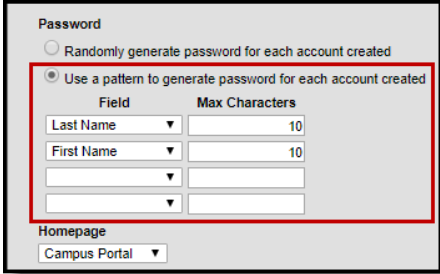
- **Local Campus Authentication Only** - This option means users will use their Campus username and password to log into Campus.
- **LDAP Authentication** - This option means users will log into Campus using their LDAP username and password (controlled and maintained by their school/district's IDP). See the LDAP Authentication article for more information.
- **SAML Authentication** - This means users will log into Campus using their SAML username and password (controlled and maintained by their school/district's IDP). See the SSO Service Provider Configuration article for more information.

Password

When determining how user account passwords are created, you have the following two options:

This section is not available if the **Authentication Type** is set to LDAP or SAML as account passwords are controlled and managed via your IDP.

Field	Description
Randomly generate password for each account created 	Selecting this option means Campus will randomly generate a unique password for each account created. For more information about communicating usernames and helping users log into their new account, please see the following articles: - Notifying Users via Email - Notifying Users via Letters If generating random passwords for users, it is critical you follow the steps detailed in the article linked above. **This is the only way to properly have a users log in and set their own password if a random password was established by Campus.**

Field	Description
Use a pattern to generate password for each account created 	Selecting this option allows you to designate a pattern for how passwords are generated for each user account created. In the example to the left, based on the criteria (Last Name, First Name, 10 characters), a user named Nate Student would have a password of 'studentnate'. When automatically creating new student user account passwords containing portions or a combination of a student's PII (Personally Identifiable Information), you do so at your own risk. Often much of a student's common PII attributes are public knowledge and can be easily ascertained. Please ensure the utmost due diligence when distributing communication of a password containing portions or combinations of student PII to the applicable student(s).

Homepage

Once Username and Password criteria has been established, determine the **Homepage** of the accounts. The **Homepage** indicates whether the student will have access to Campus Student or the Campus Parent Portal. Select Campus Student.
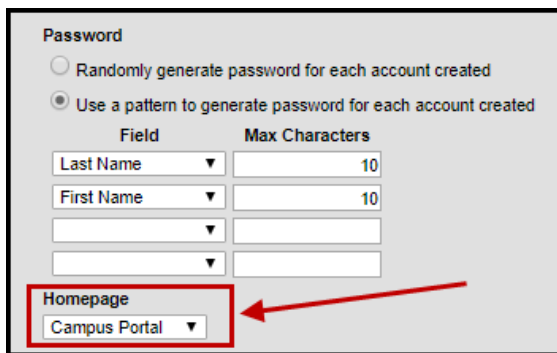

Image 6: Setting the Campus Homepage

For example, if the Homepage is set to 'Campus Student', each generated student account is defaulted to a Homepage value of 'Campus Student Portal', meaning they will be sent to Campus Student when logging into Campus. This value is set on the student's User Account tab.
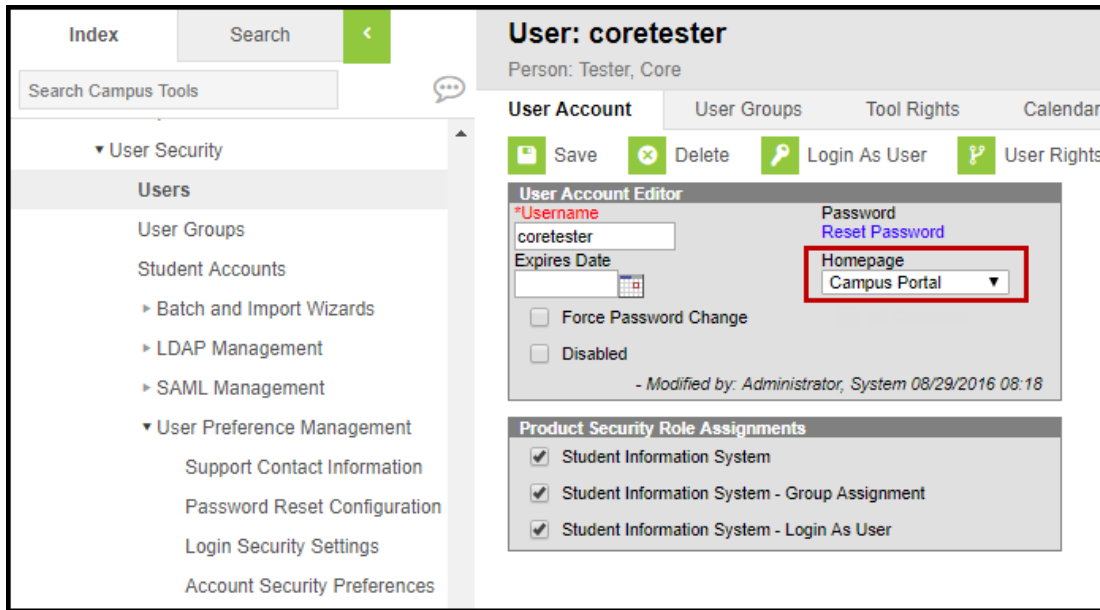
Image 7: Example of Where the Homepage Value is Set Within Campus

Create User Accounts for All Students in a School or Select Students

Once Username, Password, and Homepage criteria is set, you must determine which students will have user accounts created. User accounts can be created for all students within a selected school(s) or for a specific set of students. See the following sections below for more information about these two options.

> All accounts created require a password change upon first login.

> For more information about creating letters and emails to inform users of their new user account, see the Informing Users of Newly Created User Accounts section below.

To create user accounts for all students within a selected school(s):

1. Select an **Account Type** of 'Students'.
2. Select a **Change Type** of 'Create Account'.
3. Set Username, Authentication Type, Password, and Homepage criteria (as described in the sections above).
4. Select which school(s) will have all student user accounts created. To select multiple schools, hold the CTRL button while selecting each school.
5. To preview a list of all user accounts that will be created, click the **Preview Changes** button. A report will appear in CSV format.
6. To initiate the creation of student user accounts, click the **Save Changes** button. A report will

appear in CSV format, detailing all user accounts created.

Image 8: Creating Accounts for All Students in a School

To create user accounts for a specific student or set of students:

1. Select an **Account Type** of 'Students'.
2. Select a **Change Type** of 'Create Account'.
3. Mark the **Create user accounts for selected students** radio button.

4. Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) and click the **Search** button. Students matching search criteria will appear in the window on the right.

> Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each student which will have their user account created. When a student is selected, their name will appear in the **C. Click on a person to remove from list** window.
6. To preview a list of all user accounts that will be created, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the creation of student user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts created.
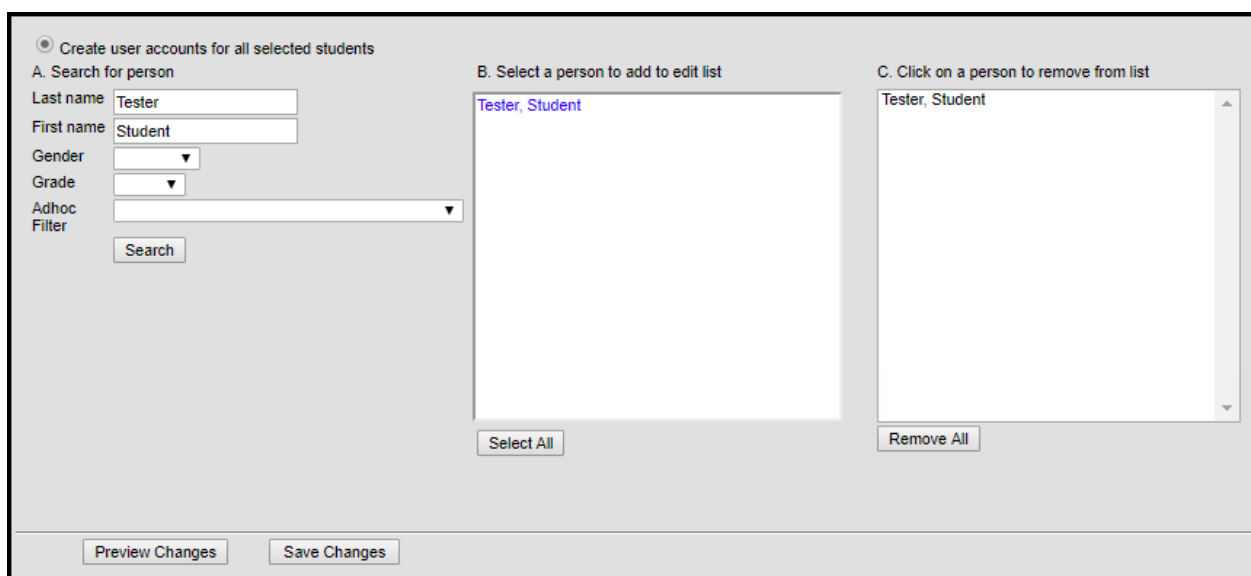

Image 9: Creating Accounts for Specific Students

Below is an example of the CSV report that will generate once the **Save Changes** button is selected (Image 10).

User Account Batch Wizard Report						
Generated on 09/28/2017 09:38:19 AM						
Account Type: students						
Change Type: createAccount						
Number of successful accounts: 1						
LastName	FirstName	MiddleName	ResultType	Username	IsCollisionResolution	ErrorMessage
Tester	Student		success	test@test.com	FALSE	

Image 10: Example of the CSV Report Detailing Created Accounts

Creating Staff Accounts

The Create Account option also allows you to create user accounts for all staff within a school(s) or for specific staff members. Options are available for determining how usernames are automatically created, as well as the default homepage (Campus Tools, Campus Instruction).

▸ Click here to expand...

See the following sections below for more information about setting up each option:

- User Groups
- Username
- Authentication Type
- Password
- Homepage
- Create User Accounts for All Staff in a School or Select Staff Members

When using the **Create Account** option, accounts will only be created for staff members with a current district assignment who do not have an existing user account within the district.

Image 11: Create Staff User Accounts Option

User Groups

User Groups can be automatically assigned to all newly created staff user accounts within a school or for a specific set of staff members. This functionality is useful for using user groups to mass assign tool rights and calendar rights for new user accounts and prevents the need to manage and assign these rights on a person by person basis.

User Groups are broken into the three following categories:

- **Tool Rights Groups** - These groups only contain tool rights and do not assign calendar rights.
- **Calendar Group** - These groups only contain calendar rights and do not assign tool rights.

- **Mixed or Empty Group** - These groups assign a combination of tool and calendar rights or they are blank and contain no calendar or tool rights at the moment.

By separating user groups into these categories, users have a better understanding of what types of rights will be assigned and can easily identify and sort through different user groups when assigning.
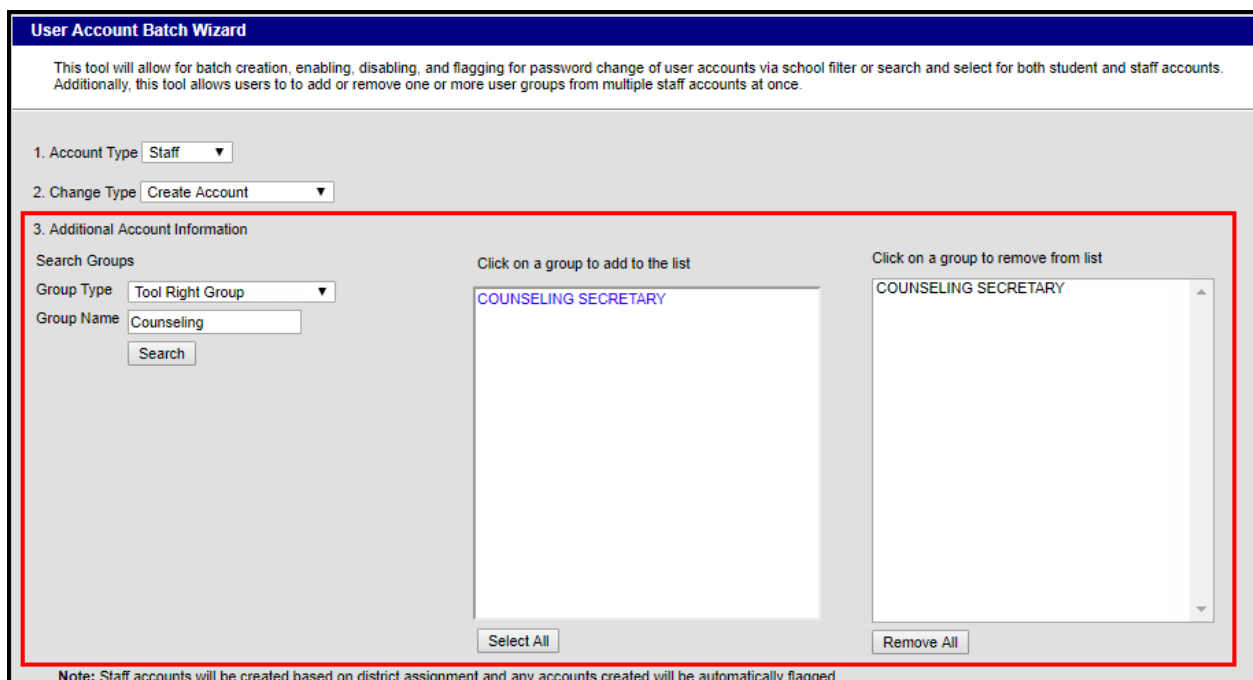

Image 12: Adding User Groups to Created User Accounts

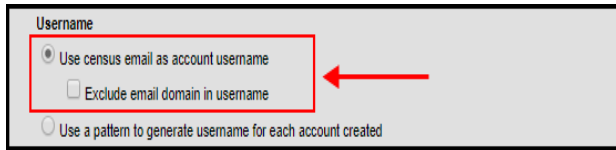### To select user groups for staff accounts being created:

1. Select an **Account Type** of 'Staff'.
2. Select a **Change Type** of 'Create Account'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be assigned to these new accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be added.
8. Once all groups have been selected, move on to the Username section below.

Username

Usernames are generated based on two available options: the email address of the staff member (existing on the Demographics tab) or a pattern used to create usernames for each account. The table below describes each option.

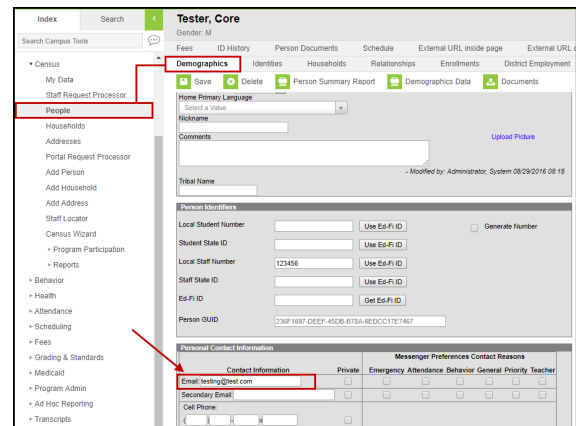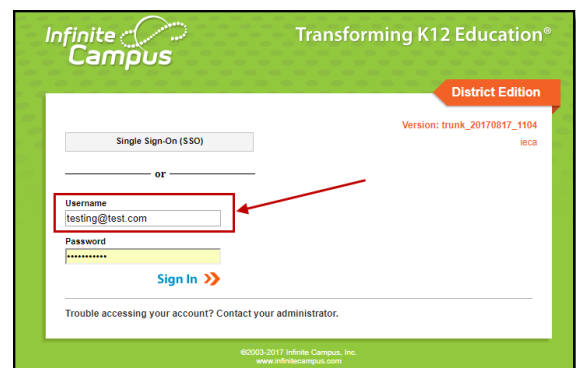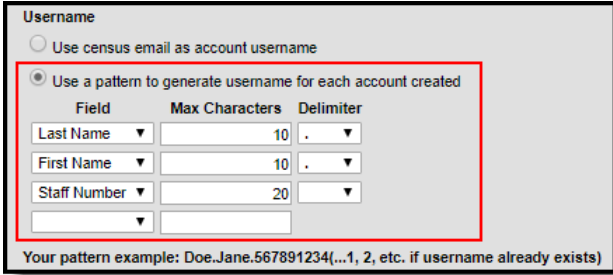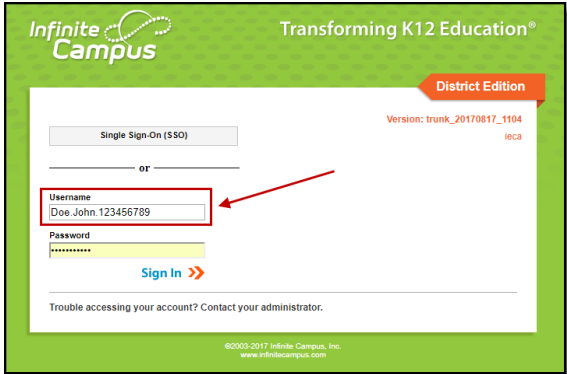| Field	Description
Use census email as account username 	Selecting this option means usernames will be generated to match the email address listed in the **Email** field on the staff member's <u>Demographics tab</u> (see below). If you would like to remove the domain from usernames generated from a staff member's census email address, mark the **Exclude email domain in username** checkbox. For example, if the user's email address is 'joetester@email.com', his generated Campus username would be 'joetester'. Usernames created via email account do not qualify for collision resolution. If the email address is missing or is already taken by an existing user account, the user account will not be created. Once the user account has been created, the user will enter their email address as their username for logging into Campus via the Campus login screen (see below).

Field	Description
Use a pattern to generate username for each account created 	Selecting this option allows you to designate a pattern for how usernames are generated for each account. For example, using the criteria entered in the picture to the left (Last Name, First Name, Staff Number), if the staff member's name is John Doe with a staff number of 123456789, he would log in with a username of Doe.John.123456789

Authentication Type

The Authentication Type determines how users of the generated accounts will log into Campus.

> This option will only appear if LDAP or SAML are configured in Campus. If hidden, the default authentication type is Local Campus Authentication.

- **Local Campus Authentication Only** - This option means users will use their Campus username and password to log into Campus.
- **LDAP Authentication** - This option means users will log into Campus using their LDAP username and password (controlled and maintained by their school/district's IDP). See the LDAP Authentication article for more information.
- **SAML Authentication** - This means users will log into Campus using their SAML username and password (controlled and maintained by their school/district's IDP). See the SSO Service Provider Configuration article for more information.

Password

Each account created will require the staff member go through the account activation process. During this process, their password will be established.

This section is not available if the **Authentication Type** is set to LDAP or SAML as account passwords are controlled and managed via your IDP.

Image 13: Staff Passwords

For more information about communicating usernames and helping users log into their new account, see the Informing Users of Newly Created User Accounts section below.

If generating random passwords for users, it is critical you follow the steps detailed in the article linked above. **This is the only way to properly have a users log in and set their own password if a random password was established by Campus.**

Homepage

Once User Group and Username criteria has been established, determine the **Homepage** of the accounts. The **Homepage** indicates whether the staff will default to Campus Tools or Campus Instruction when logging in.
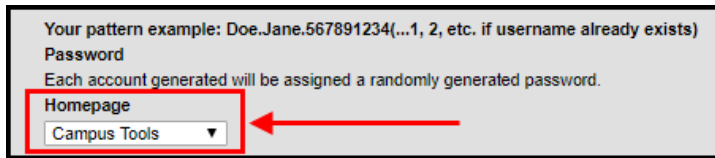
Image 14: Setting the Homepage

For example, if the Homepage is set to 'Campus Instruction', each generated staff account is defaulted to a Homepage value of 'Campus Instruction', meaning they will be sent to Campus Instruction when logging into Campus. This value is set on the user's User Account tab.
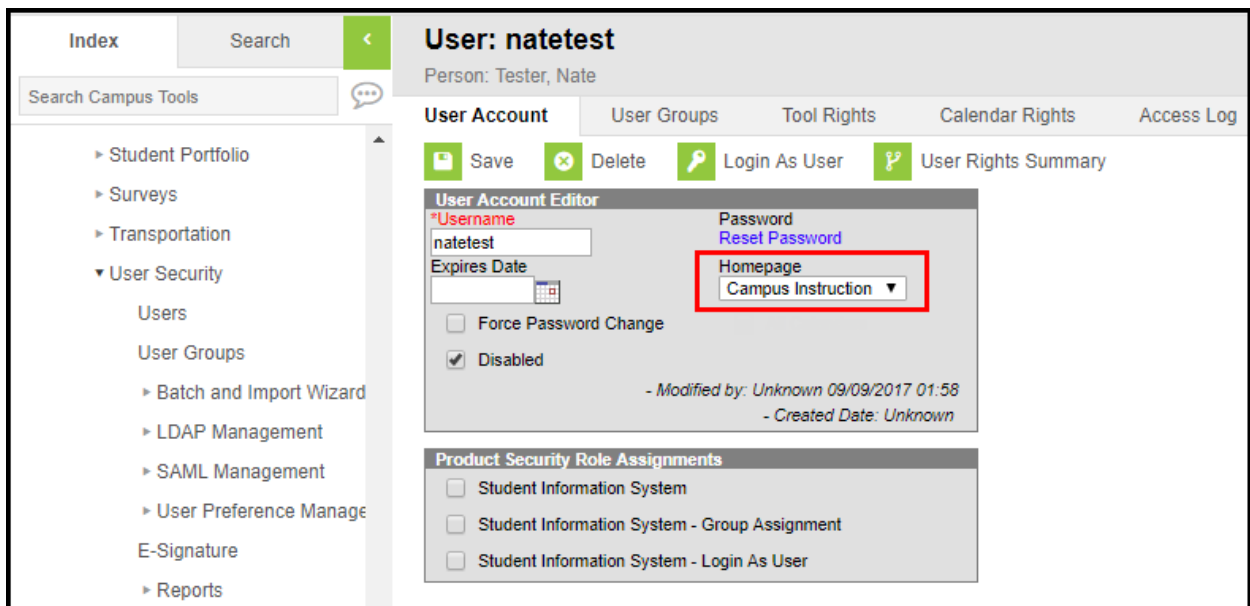

Image 15: Example of Where the Homepage Value is Set Within Campus

Create User Accounts for All Staff in a School or Select Staff Members

Once User Group, Username, Password, and Homepage criteria is set, you must determine which staff members will have user accounts created. User accounts can be created for all staff within a selected school(s) or for a specific set of staff members. See the following sections below for more information about these two options.

> All accounts created require a password change upon first login.

> For more information about creating letters and emails to inform users of their new user account, see the Informing Users of Newly Created User Accounts section below.

To create user accounts for all staff within a selected school(s):

1. Select an **Account Type** of 'Staff'.
2. Select a **Change Type** of 'Create Account'.
3. Set User Group, Username, Authentication Type, Password, and Homepage criteria (as described in the sections above).
4. Select the **Create user accounts for all staff in the selected school(s)** radio button.
5. Select which school(s) will have all staff user accounts created. To select multiple schools, hold the CTRL button while selecting each school.
6. To preview a list of all user accounts that will be created, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the creation of staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts created.
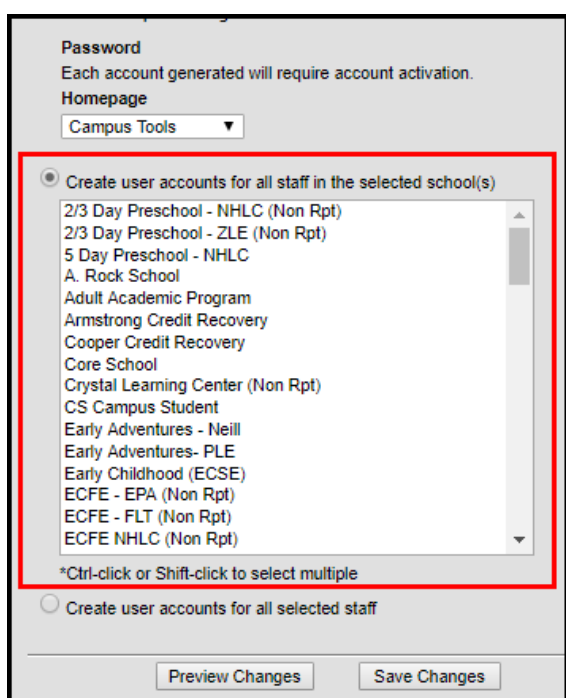
Image 16: Creating Accounts for All Staff Members in a School

To create user accounts for a specific staff members:

1. Select an **Account Type** of 'Staff'.
2. Select a **Change Type** of 'Create Account'.
3. Set User Group, Username, Password, and Homepage criteria (as described in the sections above).
4. Select the **Create user accounts for all selected staff** radio button.
5. Enter search criteria for the staff member (e.g., Last Name, First Name, Gender, Title, etc) and click the **Search** button. Staff members matching search criteria will appear in the window on the right.

Search results are district-wide.

6. In the **Select a person to add to edit list** window, select the name of each staff member which will have their user account created. When a staff member is selected, their name will appear in the **Click on a person to remove from list** window.
7. To preview a list of all user accounts that will be created, click the **Preview Changes** button. A report will appear in CSV format.
8. To initiate the creation of staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts created.

Image 17: Creating Accounts for Specific Staff

Below is an example of the CSV report that will generate once the **Save Changes** button is selected (Image 18).

Image 18: Example of the CSV Report Detailing Created Accounts

Disabling Student and Staff Accounts

The Disable Account option allows you to disable user accounts for all students or staff within a calendar(s) or for a specific set of users. See the following sections below for more information.

Image 19: Disable Account Option

Disable User Accounts for All Students or Staff in a Selected Calendar(s)

To disable all user accounts for all students or staff within a selected calendar(s):

1. Select an **Account Type**
   - **Students** - Select this option to disable all students within a selected calendar(s).
   - **Staff** - Select this option to disable all staff within a selected calendar(s).
2. Select a **Change Type** of 'Disable Account'.
3. Mark the **Disable user accounts for all students in the selected calendar(s)** OR **Disable user accounts for all staff in the selected calendar(s)** radio button.
4. Select which calendar(s) will have user accounts disabled. To select multiple calendar, hold the CTRL button while selecting each calendar.
5. To preview a list of all user accounts that will be disabled, click the **Preview Changes** button. A report will appear in CSV format.

6. To initiate the disabling of student or staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts disabled.

Student Accounts	Staff Accounts

Disable User Accounts for All Selected Students or Staff

To disable user accounts for a specific student or set of students:

1. Select an **Account Type**
    - **Students** - Select this option to disable specific students within a selected calendar(s).
    - **Staff** - Select this option to disable specific staff within a selected calendar(s).
2. Select a **Change Type** of 'Enable Account'.
3. Mark the **Disable user accounts for selected students** OR **Disable user accounts for all selected staff** radio button.
4. Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

> Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each person who will have their user account disabled. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.
6. To preview a list of all user accounts that will be disabled, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the disabling of student or staff user accounts, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts disabled.

Student Accounts	Staff Accounts

Below is an example of the CSV report that will generate once the **Save Changes** button is selected (Image 20).

Image 20: Example of the CSV Report Detailing Disabled Accounts

Forcing a Password Change

The Force Password Change option allows you to force a password change for all student or staff user accounts in a school(s) or for a specific set students or staff.

> Only students with a student user account which is enabled and does not already have the Force Password Change field selected will be forced to change their password.

See the following sections below for more information.

- Force a Password Change for All Students or Staff in a Selected School(s)
- Force a Password Change for All Selected Students or Staff

Image 21: Force Password Change Option

Force a Password Change for All Students or Staff in a Selected School(s)

To force a password change for all student or staff accounts in a selected school(s):

1. Select an **Account Type**
   - **Student** - Selecting this option means all students within the selected school(s) will be forced to change their password.

   - **Staff** - Selecting this option means all staff within the selected school(s) will be forced to change their password. Staff are identified based on the presence of a District Assignment record.
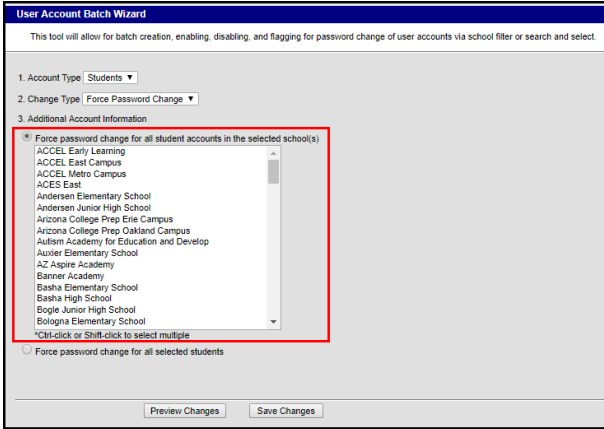
   > When forcing a password change for staff, the tool omits staff members with the following Product Security Roles: Application Security, Finance, Human Resources, Open Market Food Service, Payroll, Student Information System, Campus Learning.

2. Select a **Change Type** of 'Force Password Change'.
3. Mark the **Force password change for all student accounts in the selected school(s)** OR **Force password change for all staff accounts in the selected school(s)** radio button.
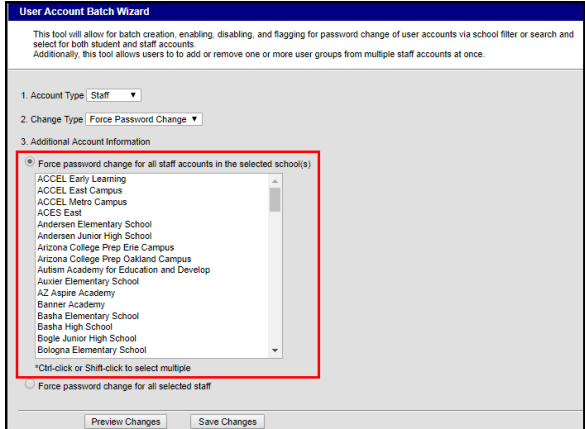4. Select which schools will have all student or staff accounts forced to change their password.

5. To preview a list of all user accounts that will be impacted, click the **Preview Changes** button. A report will appear in CSV format.
6. To initiate the forcing of a password change for student or staff user accounts in the selected school(s), click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts impacted.

> Only students with an active user account, an active or future enrollment record in the selected school(s), and does not already have the Force Password Change field selected will be required to change their user account password.

Student Accounts	Staff Accounts

Force a Password Change for All Selected Students or Staff

To force a password change for specific students or staff:

1. Select an **Account Type**.
   1. **Student** - Select this option to force a password change for specific students.

   2. **Staff** - Select this option to force a password change for specific staff. Logic identifies staff members by looking for user accounts set with a Homepage of 'Campus Application' and then excluding some users based on their user group/product security roles.

   > When forcing a password change for staff, the tool omits staff members with the following Product Security Roles: Application Security, Finance, Human Resources, Open Market Food Service, Payroll, Student Information System, Campus Learning.

2. Select a **Change Type** of 'Force Password Change'.
3. Mark the **Force password change for all selected students** or **Force password change for all selected staff** radio button.

4. Enter search criteria for the student (e.g., Last Name, First Name, Gender, Grade) or staff (e.g., Last Name, First Name, Title, Role) and click the **Search** button. Users matching search criteria will appear in the window on the right.

> Search results are district-wide.

5. In the **B. Select a person to add to edit list** window, select the name of each person who will be forced to change their password. When a person is selected, their name will appear in the **C. Click on a person to remove from list** window.
6. To preview a list of all user accounts that will be impacted, click the **Preview Changes** button. A report will appear in CSV format.
7. To initiate the forcing of a password change for all selected students or staff, click the **Save Changes** button. A report will appear in CSV format, detailing all user accounts impacted.

> Only selected students with an active user account, an active or future enrollment record in the selected school(s), and does not already have the Force Password Change field selected will be required to change their user account password.

Student Accounts	Staff Accounts

Below is an example of the CSV report that will generate once the Save Changes button is selected (Image 20).

User Account Batch Wizard Report			
Generated on 09/26/2017 03:34:45 PM			
Account Type: students			
Change Type: forcePasswordChange			
Total number of accounts: 4			
LastName	FirstName	MiddleName	Username
	John	Tester	John555
	John	Tester	John888
	John	Tester	John444
	John	Tester	John777

Image 22: Example of the CSV Report Detailing User Accounts Forced to Change Their Password

Adding User Groups to Staff Accounts

User Groups can be assigned to all staff user accounts within a school or for a specific set of staff members. This functionality is useful in mass applying calendar rights and tool rights for all staff members in a school or for a specific set of staff members (e.g., all teachers, specific counselors, etc).

User Groups are broken into the three following categories:

- **Tool Rights Groups** - These groups only contain tool rights and do not assign calendar rights.
- **Calendar Group** - These groups only contain calendar rights and do not assign tool rights.
- **Mixed or Empty Group** - These groups assign a combination of tool and calendar rights or they are blank and contain no calendar or tool rights at the moment.

By separating user groups into these categories, users have more control over what types of rights are assigned and can easily identify and sort through different user groups when assigning.

> User groups containing all schools and all calendars cannot be added to staff accounts via the User Account Batch Wizard. User accounts requiring all schools/all calendars must be handled manually.

See the following sections below for more information.

- Add User Groups for All Staff in a Selected School(s)
- Add User Groups for Specific Staff Members

Image 23: Add User Groups Option

Add User Groups for All Staff in a Selected School(s)

To add user groups for all staff within a selected school(s):

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Add User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be assigned to these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be

added.

8. Select the **Add User Groups to all staff in the selected school(s)** radio button.
9. Select which school(s) will have selected user groups assigned to all staff members. To select multiple schools, hold the CTRL button while selecting each school.
10. To preview a list of all user accounts and what user groups will be added, click the **Preview Changes** button. A report will appear in CSV format.
11. Select the **Save Changes** button. Specified User Groups have now been added to all staff members in the selected schools.

Image 24: Adding User Groups for All Staff in a School(s)

Add User Groups for Specific Staff Members

To add user groups for specific staff members:

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Add User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will

appear in search results.

4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.

5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.

6. Select which groups will be assigned to these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.

7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be added.

8. Select the **Add User Groups for selected staff** radio button.

9. Search for a person by entering identifying criteria (e.g., Last Name, First Name, Gender, Title, etc) and click the **Search** button. Search results will appear in the window to the right.

Search results are district-wide.

10. Select which users will have user groups added by click on their name in the **Select a person to add to edit list** window. Once a person is selected they will appear in the **Click on a person to remove from list** window.

11. To preview a list of what user groups will be added for which people, click the **Preview Changes** button. A report will appear in CSV format.

12. Once ready initiate the addition of the user groups, select the **Save Changes** button. Specified User Groups have now been added to the selected users.

Image 25: Adding User Groups for Specific Staff Members

Below is an example of the report that is produced once user groups are added.

User Account Batch Wizard Report				
Generated on 10/26/2017 02:34:39 PM				
Account Type: staff				
Change Type: addGroups				
LastName	FirstName	MiddleName	UserName	GroupName
Johnson	Carole		CMJohnson	16-17 Calendar
Johnson	Carole		CMJohnson	Admin Calendar
Johnson	Carole		CMJohnson	Calendar
Johnson	Carole		CMJohnson	PreSchool
Johnson	Carole		CMJohnson	SACC Calendar
Johnson	Carolyn		CFJohnson	16-17 Calendar
Johnson	Carolyn		CFJohnson	Admin Calendar
Johnson	Carolyn		CFJohnson	Calendar
Johnson	Carolyn		CFJohnson	PreSchool
Johnson	Carolyn		CFJohnson	SACC Calendar

Image 26: Example of the User Group Report

Removing User Groups to Staff Accounts

User Groups can also be removed from all staff user accounts within a school or for a specific set of staff members. This functionality is useful in mass removing calendar rights and tool rights for all staff members in a school or for a specific set of staff members (e.g., all teachers, specific counselors, etc).

See the following sections below for more information.

- Remove User Groups for All Staff in a Selected School(s)
- Remove User Groups for Specific Staff Members
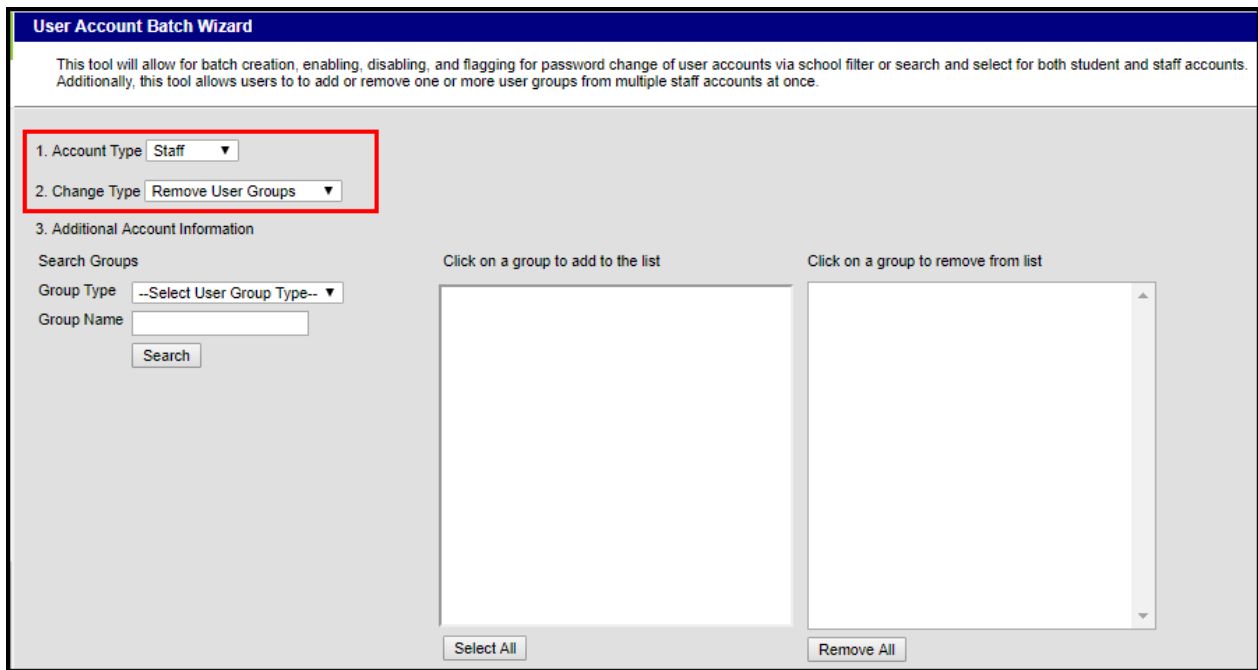
Image 27: Remove User Groups Option

Remove User Groups for All Staff in a Selected School(s)

To remove user groups for all staff within a selected school(s):

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Remove User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be removed from these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be added for removal.
8. Select the **Remove User Groups to all staff in the selected school(s)** radio button.
9. Select which school(s) will have selected user groups removed for all staff members. To select multiple schools, hold the CTRL button while selecting each school.
10. To preview a list of all user accounts that will have user groups removed, click the **Preview Changes** button. A report will appear in CSV format.
11. Select the **Save Changes** button. Specified User Groups have now been removed to all staff members in the selected schools.

Image 28: Removing User Groups for All Staff in a School(s)

Remove User Groups for Specific Staff Members

To remove user groups for specific staff members:

1. Select an **Account Type** of 'Staff'
2. Select a **Change Type** of 'Remove User Groups'.
3. Search for a User Group by first selecting the **Group Type**. Only user groups of this type will appear in search results.
4. Enter the **Group Name** being searched. Only user groups of the selected type which matches the group name entered will appear in search results.
5. Click the **Search** button. Search results will appear in the **Click on a group to add to the list** window on the right.
6. Select which groups will be removed from these user accounts. Selected groups will appear in the **Click on a group to remove from list** window.
7. Repeat steps 1-6 If additional tool rights groups, calendar groups, or mix user groups should be

added for removal.

8. Select the **Remove User Groups for selected staff** radio button.

9. Search for a person by entering identifying criteria (e.g., Last Name, First Name, Gender, Title, etc) and click the **Search** button. Search results will appear in the window to the right.

> Search results are district-wide.

10. Select which users will have user groups removed by click on their name in the **Select a person to add to edit list** window. Once a person is selected they will appear in the **Click on a person to remove from list** window.

11. To preview a list of what user groups will be removed for which people, click the **Preview Changes** button. A report will appear in CSV format.

12. Once ready initiate the removal of the user groups, select the **Save Changes** button. Specified User Groups have now been removed for the selected users.

Image 29: Removing User Groups for Specific Staff Members

Below is an example of the report that will appear once the **Save Changes** button is selected.

User Account Batch Wizard Preview				
Generated on 10/26/2017 02:36:33 PM				
Account Type: staff				
Change Type: removeGroups				
LastName	FirstName	MiddleName	UserName	GroupName
Johnson	Carole		CMJohnson	16-17 Calendar
Johnson	Carole		CMJohnson	Admin Calendar
Johnson	Carole		CMJohnson	Calendar
Johnson	Carole		CMJohnson	PreSchool
Johnson	Carole		CMJohnson	SACC Calendar
Johnson	Carolyn		CFJohnson	16-17 Calendar
Johnson	Carolyn		CFJohnson	Admin Calendar
Johnson	Carolyn		CFJohnson	Calendar
Johnson	Carolyn		CFJohnson	PreSchool
Johnson	Carolyn		CFJohnson	SACC Calendar

Image 30: Example of the Remove User Groups Report

Informing Users of Newly Created User Accounts

You can inform all users who have a newly created user account or who have never logged into their user account to log into their account and update their account password by using the User Account Messenger, User Account Messenger Scheduler, and Account Letter Builder tools.

▶ Click here to expand...

See the following sections below for more information:

- Creating an Email Message to Inform Users of Their New User Account
- Establishing a Recurring User Account Activation Message
- Creating Letters to Inform Users of Newly Created User Accounts

Creating an Email Message to Inform Users of Their New User Account

PATH: *System Administration > User Security > Batch and Import Wizards > User Account Messenger*

You can use the User Account Messenger to send an email for users to follow and access their new user account.
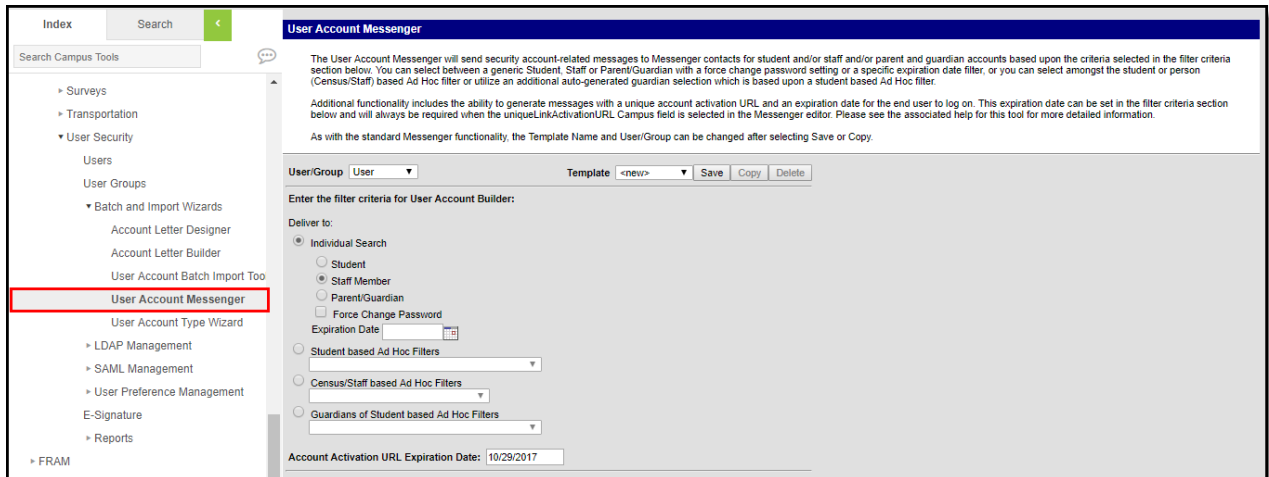
Image 31: User Account Messenger

In the example below, an Ad hoc filter was created which includes the total login count (usage.totalLoginCount) and if the account is flagged to require a password change (usage.forceChangePassword). These fields are important as can be combined with Filter Parameters to identify only those users who have a Campus user account who have never logged into their account and need to change their password (which will be the case for any accounts auto-generated via Account Security Preferences).

Use the following values to ensure a proper list is generated (see Image 32):

- usage.totalLoginCount
  - Operator: =
  - Value: 0
- usage.forceChangePassword
  - Operator: =TRUE

Image 32: Filter of Users Who Need to Log into their User Account

Once this filter is created, use the User Account Messenger to send a message to each one of these users.

This message should include the following Campus fields:

- The **accountManagement.username** field.
- The **accountManagement.uniqueLinkActivationURL** field.

- The **accountManagmeent.uniqueLinkExpirationDate** field.

You should also enter an **Account Activation URL Expiration Date** (see Image 33). This is the date the unique activation URL contained in the message will expire. Users will need to select this URL prior to this date.

Filter criteria is important when sending this message. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Staff Accounts, etc) will receive the message and be able to activate their accounts.

For notifying Staff, please consider the following:

- If notifying staff of their newly created Campus Application accounts (System Administration > User Security > Users > User Account > Homepage = Campus Instruction OR Campus Application), use the **Census/Staff based Ad Hoc Filters (Staff Accounts)** filter option.

Image 33: Informing Users who Need to Log into Their User Account

Establishing a Recurring User Account Activation Message

Once you have created and saved a user account activation message in the User Account Messenger tool (see the steps mentioned in the section above), you can establish a daily, weekly, or monthly recurring message event using the User Account Messenger Scheduler.
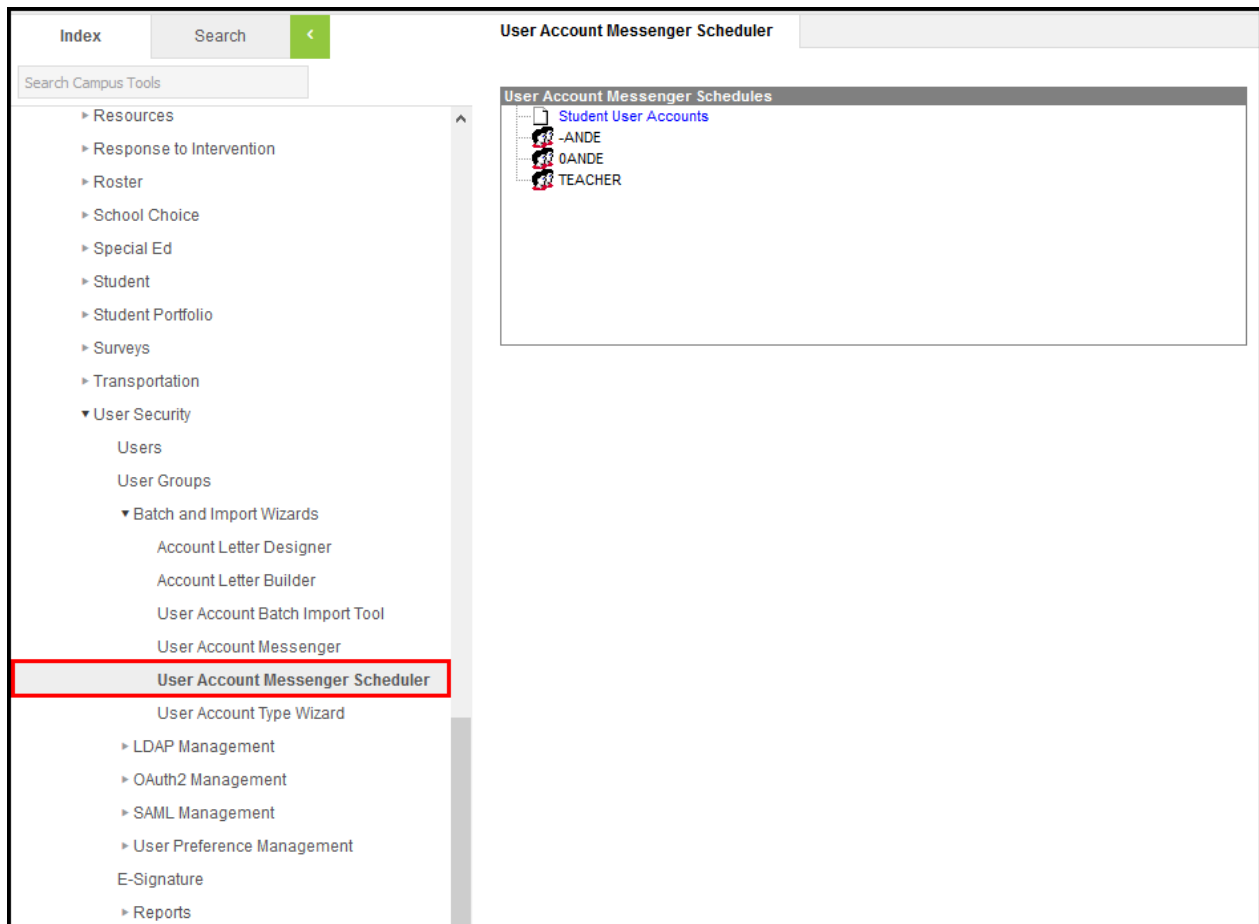
Image 34: User Account Message Scheduler

For example, using a user account activation message template and setting to a frequency of daily, you can set the User Account Messenger Scheduler to email the user account activation email to any user accounts created in the last 24 hours and repeat this process every day within a certain timeframe.

See the User Account Messenger Scheduler article for more information about this process.

Creating Letters to Inform Users of Newly Created User Accounts

PATH: *System Administration > User Security > Batch and Import Wizards > Account Letter Builder*

You can use the Account Letter Builder to all users who have a newly created user account or who have never logged into their user account to log into their account and update their account password.
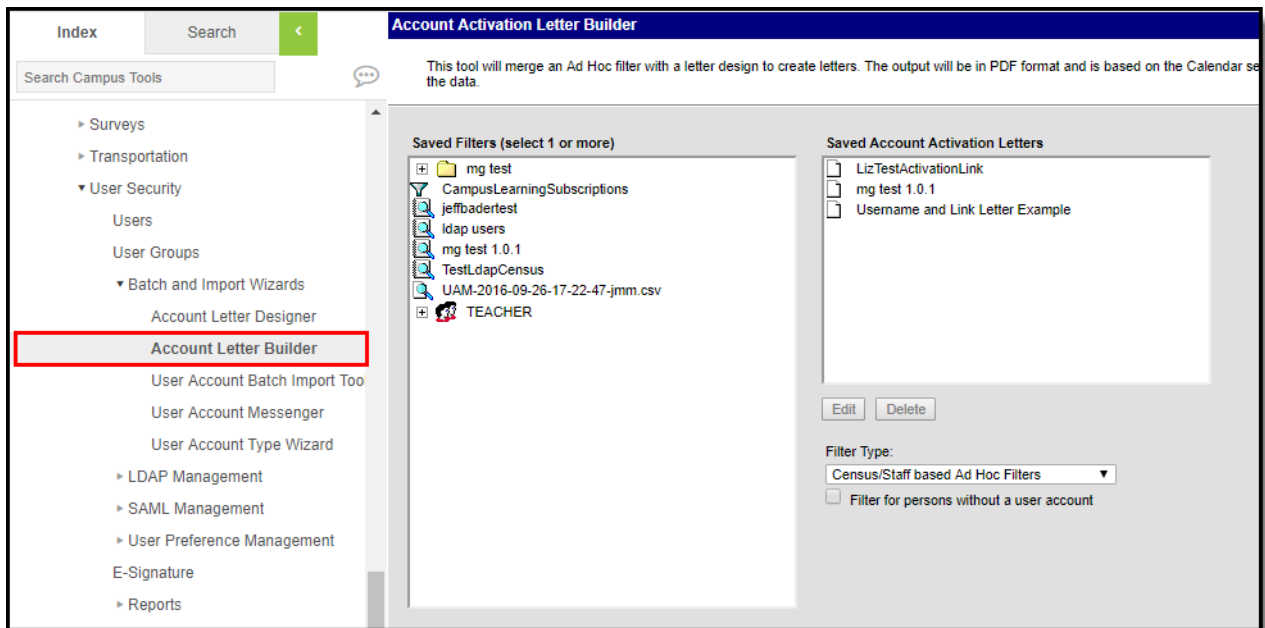
Image 35: Account Letter Builder

In the example below, an Ad hoc filter was created which includes the total login count (usage.totalLoginCount) and if the account is flagged to require a password change (usage.forceChangePassword). These fields are important as can be combined with Filter Parameters to identify only those users who have a Campus user account who have never logged into their account and need to change their password (which will be the case for any accounts auto-generated via Account Security Preferences).

Use the following values to ensure a proper list is generated (see Image 35):

- **usage.totalLoginCount**
  - Operator: =
  - Value: 0
- **usage.forceChangePassword**
  - Operator: =TRUE

Image 36: Filter of Users Who Need to Log into their User Account

Once this filter is created, use the Account Letter Designer to design a letter which will generate for each one of these users.

This letter should include the following Campus fields (see Image 36):

- The **accountManagement.username** field.
- The **accountManagement.uniqueLinkActivationURL** field.

- The **accountManagmeent.uniqueLinkExpirationDate** field.

Image 37: Building a Letter to Inform Users who Need to Log Into Their Account

Once the filter has been created and the account activation letter has been build:

1. Select a **Filter Type**.

Filter criteria is important when generating this letter. Only users who match the filter criteria selected (e.g., Student based Ad Hoc Filters, Census/Staff based Ad hoc Filters (Portal Accounts), etc) will have a letter generated.

For notifying Staff, please consider the following:

- If notifying staff of their newly created staff Portal accounts (System Administration > User Security > Users > User Account > Homepage = Campus Portal), use the **Census/Staff based Ad Hoc Filters (Portal Accounts)** filter option.
- If notifying staff of their newly created Campus Application accounts (System Administration > User Security > Users > User Account > Homepage = Campus Instruction OR Campus Application), use the **Census/Staff based Ad Hoc Filters**

(Staff Accounts) filter option.

2. Select the filter from the **Saved Filters** window.
3. Select the letter from the **Saved Account Activation Letters** window.
4. Enter an **Account Activation URL Expiration Date**. This is the date the unique activation URL contained in the message will expire (see Image 37). Users will need to select this URL prior to this date.
5. Click the **Build Letters** button. The letters will appear in a separate window.

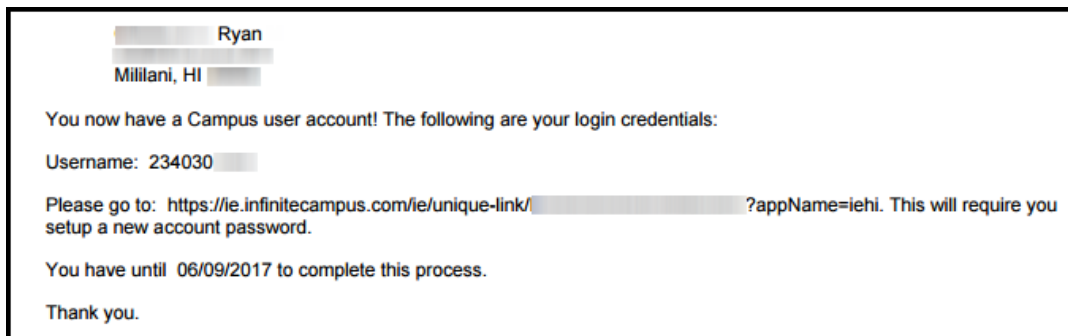*Image 38: Generating a Letter*

Below is an example of a generated letter using this scenario (Image 38).

Image 39: Example of a Letter