



ProgressBook StudentInformation Security Guide



StudentInformation

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Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation Security Guide* have been made.

Product Version	Heading	Page	Reason
21.1.0	"Appendix E: Preset Roles"	63	Removed the roles SISPROFICIENCY - DISPLAY and SISPROFICIENCY - UPDATE from the list of StudentInformation Preset Roles.
21.0.0	"Appendix F: Job Function Access"	67	Added new Frontline Special Programs Management job functions.
20.5.0	"Resource Permissions"	10	Added note indicating that the SPM tab is non-functional.
N/A	"DataMap Preset Roles"	63	Added ability to view state student IDs for any export for the DataMap - Assessment Admin role.
20.3.0	"Setting Up GradeBook Accounts"	3	Added new section.
20.3.0	"Setting Up SpecialServices Classic Accounts"	5	Added new section.
20.3.0	"Account Maintenance"	19	Added screenshots and text regarding view-only access. Updated screenshot to reflect new At a Glance section. Updated text to reflect new account option available to complete the account creation process for unmigrated accounts.
20.3.0	"Adding a ProgressBook Account"	23	Added new section.
20.3.0	"Adding a Windows Account"	25	Added new section.
20.3.0	"Adding an LDAP Account"	28	Added new section.
20.3.0	"Staff Maintenance"	35	Added screenshots and text regarding view-only access. Updated screenshot to reflect new At a Glance section. Updated text to reflect new message when attempting to create a staff member record for an unmigrated account.
N/A	"Curriculum Coordinator"	58	Removed Curriculum Coordinator table and added Curriculum Coordinator to the list of job functions that do not grant any access.
20.2.0	"Account Maintenance"	19	Updated screenshots to reflect changes to the user interface. Added caution note regarding updating account usernames.
20.2.0	"Adding Staff Members"	37	Updated screenshot to reflect the wording changes to the State staff ID unavailable checkbox.
N/A	"Resetting a Password"	34	Updated text to reflect that accounts with only the ProgressBook domain are required to change their password upon signing in once the password has been reset.

Change Log

Product Version	Heading	Page	Reason
N/A	<i>"Appendix F: Job Function Access"</i>	67	Updated GradeBook-specific job function access to include lunch choices and lunch count reports where applicable.
20.1.0	Entire Guide	N/A	Rewrote guide to reflect new security workflows.

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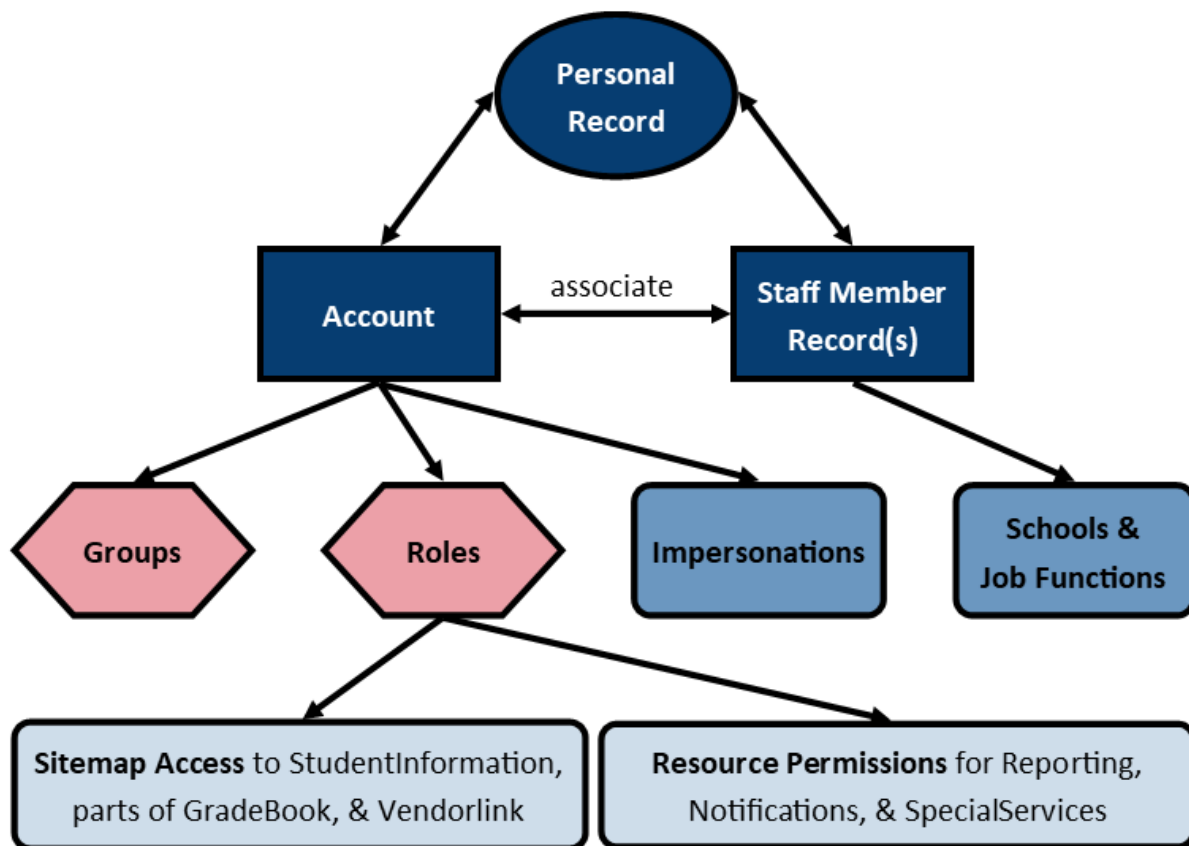
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Overview

Security defines access to various features in ProgressBook. This chapter provides a high-level view of the security workflow as well as a procedural list for administrators who update security access (see [“Maintaining Security”](#)) or want to create a new security configuration (see [“Implementing Security”](#)).

The following graphic depicts the flow in which an administrator can access various parts of the security module to create, update, and associate accounts and staff member records for a user (individual).



Dark Blue – Records that belong to the user (individual).

Red – Created on a separate screen and then assigned to the account.

Blue – Assigned to the account or staff member record on the user record screen.

Light blue – Types of access that can be granted via roles.

For more information on each component in the graphic, you can refer to [“Appendix A: Glossary.”](#)

Maintaining Security

To update security for your ITC, district, or building, complete the following steps:

1. Review roles and role access (see [“Role Maintenance”](#))
2. Review role/school combinations for groups (see [“Group Maintenance”](#))
3. Create new or edit existing StudentInformation accounts (see [“Account Maintenance”](#))
 - a. Assign role combinations to accounts (see [“Assigning/Removing Roles”](#) or [“Bulk Assigning a Role to Accounts”](#))
 - b. Add groups to accounts (see [“Assigning/Removing Groups”](#))
 - c. Add staff impersonations for accounts (see [“Adding/Removing Staff Member Impersonations”](#))
4. Review and create staff (see [“Staff Maintenance”](#))
 - a. Associate staff to accounts (see [“Adding Staff Members”](#))
 - b. Add schools and job functions to staff members (see [“Editing Schools”](#))

Implementing Security

When creating a new security configuration, complete the following steps:

1. Determine type of security (see [“Determine Security Management Type”](#))
2. Determine type of staff members and access ([“Determine Type of Staff Members and Access”](#))
3. Create roles and define role access (see [“Role Maintenance”](#))
4. Create groups (see [“Group Maintenance”](#))
5. Assign role/school combinations to groups (see [“Group Roles Tab”](#))
6. Create new StudentInformation accounts (see [“Adding an Account”](#))
 - a. Assign role combinations to accounts (see [“Assigning/Removing Roles”](#) or [“Bulk Assigning a Role to Accounts”](#))
 - b. Assign groups to accounts (see [“Assigning/Removing Groups”](#))
 - c. Add staff impersonations for accounts (see [“Adding/Removing Staff Member Impersonations”](#))
7. Create staff (see [“Staff Maintenance”](#))
 - a. Associate staff to accounts (see [“Adding Staff Members”](#))
 - b. Add schools and job functions to staff members (see [“Editing Schools”](#))

Setting Up GradeBook Accounts

After reviewing roles and groups, when setting up a new account for a GradeBook user, complete the following steps in StudentInformation and GradeBook:

1. In StudentInformation, create a new account for the user (see [“Account Maintenance”](#)).
2. (Optional) If the user requires access to StudentInformation, complete the following steps as needed:
 - a. Assign role combinations to the account (see [“Assigning/Removing Roles”](#) or [“Bulk Assigning a Role to Accounts”](#)).
 - b. Add groups to the account (see [“Assigning/Removing Groups”](#)).
 - c. Add staff impersonations for the account (see [“Adding/Removing Staff Member Impersonations”](#)).
3. Create a staff member record for the user (see [“Staff Maintenance”](#)).
4. Associate the staff member record to the corresponding account (see [“Adding Staff Members”](#)).
5. Add the user’s school(s) and job function(s) (see [“Appendix F: Job Function Access”](#)) to their staff member record (see [“Editing Schools”](#)).
 - If the user is a teacher, add a Teacher job function for each school building in which the user is a teacher; e.g., if the teacher teaches at Test High School and Test Middle School in FY21, in StudentInformation there should be 2 records for FY21: a Teacher job function for Test High School and a Teacher job function for Test Middle School.
 - If the user should be assigned any non-teacher job function(s), assign one or more applicable job functions at the building level only to their primary building. Each job function assigned to the user displays in GradeBook as a separate record. For example, if you assign a user both the Principal and School Admin job functions in StudentInformation for Test High School in FY21, in GradeBook, there will be one record for Principal and one record for School Admin for Test High School. You can then assign any additional schools as needed per job function in GradeBook.

Note: Only the following job functions in StudentInformation are used in GradeBook. For more details, see [“Appendix F: Job Function Access.”](#)

StudentInformation		GradeBook
Curriculum Director		Curriculum Director
Attendance		Attendance
School Support		SchoolSupport
School Administrator		SchoolAdministrator
Secretary		Clerk
Cafeteria Worker		Cafeteria
Principal	GradeBook-Principal	Principal
Counselor	GradeBook-Guidance	Guidance
Teacher		Teacher

Overview

6. (Conditional) In GradeBook, if the user is not a teacher and requires access to more than one school building, complete the following steps:
 - a. On the **Administrator Home Page**, below **Annual Setup**, click **Staff**.
 - b. Using the available search fields, locate the new user account.

Note: *If the user was assigned more than one non-teacher job function in StudentInformation, a row for each job function displays in GradeBook. Thus, you can assign access to multiple buildings for only one job function in GradeBook without affecting any other assigned job function(s) for the same user.*

	Name	User Name	Account Associated	Staff ID	Role	School	HR	GB Access	SIS Status	Help
▶	Jones, Katie	ths_kjones		ABCD	Teacher	THS		Enabled	Active	<input type="checkbox"/>
▶	Jones, Katie	ths_kjones		ABCD	Principal	THS		Enabled	Active	<input type="checkbox"/>

- c. In the row of the account and job function for which you wish to grant additional building access, click
- d. On the window that opens, click the **Schools** tab.
- e. Select the checkbox beside each school building to which the user should have access in GradeBook.
- f. Click **Update**. The user can now log in to GradeBook and access any of the assigned school buildings as needed for that job function.

Admin Schools for Jones, Marie

Main Schools

Check the schools where the user will have administrative access.

Show Inactive School(s)

<input type="checkbox"/> Test A Elementary School	<input checked="" type="checkbox"/> Test High School	<input checked="" type="checkbox"/> Test Middle School
<input type="checkbox"/> Test B Elementary School	<input type="checkbox"/> Test Intermediate School	

Select all Schools Remove all Schools

Update

- g. (Optional) Repeat [step c](#) through [step f](#) as needed for each assigned job function.

Setting Up SpecialServices Classic Accounts

After you review roles and groups, when you set up a new account for a SpecialServices Classic user, complete the following steps in StudentInformation, GradeBook, and SpecialServices Classic.

1. Complete [step 1](#) through [step 6](#) in “[Setting Up GradeBook Accounts](#)” in StudentInformation and GradeBook.
2. In SpecialServices Classic, navigate to **SpecialServices > Admin > Assign Roles (Grid View)**. If the user is a non-teaching staff member or a teacher assigned to a single building, their staff name displays when you select their designated primary school. If the user is a teacher assigned to multiple buildings, their staff name displays when you select each building to which they are assigned.

Staff Name	Level 100	Level 200	Level 300	Level 400	Level 450	Level 500	Level 600
Marie Jones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. In the **Select Building** drop-down list, select the building to which the user should have access.
4. In the row of the user whose security privileges you want to define, select the checkbox for each applicable row.

Note: When assigning access for multiple buildings for a single teacher, the security levels assigned must be identical at all buildings.

5. Click **Submit Rows**.
6. (Optional) Repeat [step 3](#) through [step 5](#) as necessary for the user.

Security Maintenance

Refer to the following sections to maintain and update your district or building security settings.

- [“Role Maintenance”](#)
- [“Group Maintenance”](#)
- [“Account Maintenance”](#)
- [“Staff Maintenance”](#)
- [“Personal Information Maintenance”](#)

Role Maintenance

Navigation: StudentInformation > Management > Security > View Roles

Roles are used to define which screens or features an account can access. Role management involves creating, modifying, and removing roles as well as defining the sitemap and/or feature access each role grants to the account. Role assignment also determines the administrative school or district to which the account is granted sitemap and/or feature access.

***Note:** You can assign multiple roles to 1 account. If 2 assigned roles have conflicting access to a particular screen or feature, the role with Disabled access takes precedence over the role with Enabled access. Disabled access also takes precedence over Neutral (neither granted nor denied) access.*

When you add or modify a role, you can determine the role’s [“Sitemap Access”](#) and [“Resource Permissions”](#) (feature access). Preset roles are also available for DataMap, Reporting, SpecialServices, and StudentInformation (see [“Appendix E: Preset Roles”](#)).

Refer to any of the following sections:

- [“Searching for Roles”](#)
- [“Adding/Editing Roles”](#)
 - [“Sitemap Access”](#)
 - [“Resource Permissions”](#)
- [“Bulk Assigning a Role to Accounts”](#)

Searching for Roles

Navigation: StudentInformation > Management > Security > View Roles

The screenshot shows a web interface titled "View Roles". It features a search bar with two input fields: "School:" with a dropdown menu currently set to "All Schools", and "Role Name:" with a text input field. To the right of the "Role Name" field is a blue "Search" button. Below the search bar is a green "Add New Role" button.

1. In the **School** drop-down list, select the district or building to which the role grants access.









- In the **Role Name** field, enter a full or partial role name, and then click **Search**.



Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.

A grid of roles that meet the search criteria displays.

View Roles

School: Role Name:


	School Name	Role
 	All Buildings	AH-Assessment Admin Viewer
 	All Buildings	AH-Assessment Viewer
 	All Buildings	AH-Attendance Admin Viewer
 	All Buildings	AH-Attendance Viewer

- You can now perform any of the following options:
 - Click **Add New Role** to create a new role (see [“Adding/Editing Roles”](#)).
 - Click  in the row of the role you wish to modify or whose access you wish to view (see [“Adding/Editing Roles”](#)).
 - Click  in the row of the role you wish to delete.

Adding/Editing Roles

Navigation: StudentInformation > Management > Security > View Roles > Add/Edit Roles

You can access the **Security - Role** screen by clicking **Add New Role** on the **View Roles** screen.

You can also access the **Security - Role: [role name]** screen by clicking  after searching on the **View Roles** screen (see [“Searching for Roles”](#)).

Security - Role: AH-Assessment Viewer

Administrative School:

Role Name:

Available

- Test ITC
- Test School District
- Test High School
- Test Middle School


Assigned

- All Buildings

- In the **Administrative School** drop-down list, select the ITC, district, or school whose users can edit the role.

2. In the **Role Name** field, enter or modify the name of the role.

Note: *The role and administrative school combination must be unique (each role name can have only one administrative school).*

3. The **Available** and **Assigned** listboxes let you specify the buildings and/or districts to which the role grants access. In the **Available** listbox on the left, select the building(s) and/or district(s) to which the role should have access, then click  to move them to the **Assigned** listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move buildings or districts between the listboxes.)
4. (Optional) To edit sitemap access in StudentInformation or enable certain features in GradeBook or VendorLink, click **Edit Sitemap Access** (see [“Sitemap Access”](#)).

Note: *Preset roles are available for StudentInformation and DataMap (see [“Appendix E: Preset Roles”](#)).*



5. (Optional) To edit resource permissions (features) for Reporting, SpecialServices, or StudentInformation, click **Edit Resource Permissions** (see [“Resource Permissions”](#)).

Note: *Preset roles are available for Reporting and SpecialServices (see [“Appendix E: Preset Roles”](#)).*

6. When you are done modifying the sitemap access and/or resource permissions for the role, click **Save**.


Sitemap Access




































Navigation: StudentInformation > Management > Security > View Roles > Add New Roles button or Edit icon > Edit Sitemap Access button



The sitemap displays hierarchically, and you can click  and  beside each folder to expand or collapse nodes. Four access settings display for each sitemap node: **Display**, **Add**, **Change**, and **Delete**. Access for a node can be toggled among Enabled, Disabled, and Neutral by clicking beside each access setting name (**Display**, **Add**, **Change**, and **Delete**).

Security - Role: AH-Assessment Viewer

AH-Assessment Viewer is the role currently working with

 Home

	Display:	Add:	Change:	Delete:	- Validation Logging
	Display:	Add:	Change:	Delete:	- Browser Not Supported
	Display:	Add:	Change:	Delete:	- Browser Not Compatible
	Display:	Add:	Change:	Delete:	- Access Denied
	Display:	Add:	Change:	Delete:	- SIS
	Display:	Add:	Change:	Delete:	- Graduation / Eligibility
	Display:	Add:	Change:	Delete:	- Registration Wizard
	Display:	Add:	Change:	Delete:	- Student
	Display:	Add:	Change:	Delete:	- Assessment
	Display:	Add:	Change:	Delete:	- Attendance
	Display:	Add:	Change:	Delete:	- Course History
	Display:	Add:	Change:	Delete:	- Discipline
	Display:	Add:	Change:	Delete:	- Fees
	Display:	Add:	Change:	Delete:	- Scheduling
	Display:	Add:	Change:	Delete:	- Marks
	Display:	Add:	Change:	Delete:	- School
	Display:	Add:	Change:	Delete:	- Medical
	Display:	Add:	Change:	Delete:	- Staff
	Display:	Add:	Change:	Delete:	- Staff Members
	Display:	Add:	Change:	Delete:	- Student Search Results
	Display:	Add:	Change:	Delete:	- GoTo Search Results
	Display:	Add:	Change:	Delete:	- Advanced Student Search
	Display:	Add:	Change:	Delete:	- Course Selection Assistant
	Display:	Add:	Change:	Delete:	- Teacher Menu
	Display:	Add:	Change:	Delete:	- EZ Query
	Display:	Add:	Change:	Delete:	- Management
	Display:	Add:	Change:	Delete:	- EMIS
	Display:	Add:	Change:	Delete:	- My Account
	Display:	Add:	Change:	Delete:	- ITC
	Display:	Add:	Change:	Delete:	- Local
	Display:	Add:	Change:	Delete:	- Extra System Permissions
	Display:	Add:	Change:	Delete:	- Develop
	Display:	Add:	Change:	Delete:	- VendorLink REST
	Display:	Add:	Change:	Delete:	- Certified Integration APIs
	Display:	Add:	Change:	Delete:	- DataMap

- Enabled  – Indicates that the user with this role has access to this screen or feature.
- Disabled  – Indicates that the user with this role does not have access to this screen or feature.

- Neutral (blank) – Indicates that access is neither allowed nor restricted for this screen or feature.

Note: You can assign multiple roles to 1 account. If 2 assigned roles have conflicting access to a particular screen or feature, the role with Disabled access takes precedence over the role with Enabled access. Disabled access also takes precedence over Neutral (neither granted nor denied) access.



The majority of the available nodes correspond directly to the sitemap in StudentInformation (e.g., enabling **Display** access for the **Assessment Imports** node grants view access to the **Assessment Imports** screen). For nodes that grant access to specific actions instead of screens, see “[Appendix C: Sitemap Access Details.](#)”

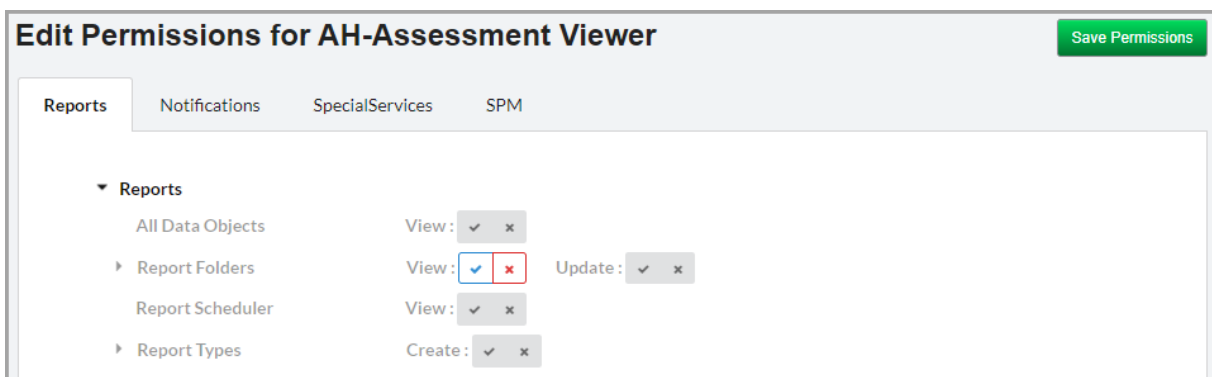
When you are finished making changes, click **Save Access**.

Resource Permissions

Navigation: StudentInformation > Management > Security > View Roles > Add New Roles button or Edit icon > Resource Permissions button

The **Reports**, **Notifications**, and **SpecialServices** tabs let you grant access to specific features for ProgressBook Reporting, suite-wide notifications, and ProgressBook SpecialServices, respectively.

The resource permissions display hierarchically, and you can click  and  beside each node to expand or collapse them. Access for a node can be toggled among Enabled, Disabled, and Neutral. You can also see hierarchical access to items that are not expanded (Enabled below, Disabled below). Depending on the node, you may see one or more different access settings, such as **View**, **Update**, **Create**, **Delete**, **Complete**, or **Allow**.



- Enabled – Indicates that the account with this role has access this feature and all available features nested below this node.
- Enabled below – Indicates that the account with this role has access at least one feature nested below this node.
- Disabled – Indicates that the account with this role cannot access this feature nor any available feature nested below this node.
- Disabled below – Indicates that the account with this role cannot access at least one feature below this node.

- Neutral – Indicates that access is neither enabled nor disabled for this feature.

Note: You can assign multiple roles to 1 account. If 2 assigned roles have conflicting access to a particular screen or feature, the role with Disabled access takes precedence over the role with Enabled access. Disabled access also takes precedence over Neutral (neither granted nor denied) access.

For more information on the access granted by the nodes within each tab, refer to the following sections:

- [“Reports tab”](#)
- [“Notifications tab”](#)
- [“SpecialServices tab”](#)

When you are done making changes, click **Save Permissions**.

Note: As of ProgressBook Suite v20.5.0, the **SPM** tab is non-functional as the integration with Frontline Special Programs Management is not supported at this time.

Bulk Assigning a Role to Accounts

Navigation: StudentInformation > Management > Security > Assign Roles to Accounts

The **Assign Role to Accounts** screen lets the security administrator assign a role to one or more accounts at a time.

Assign Role To Accounts

School:

Role:

Last Name: First Name:

Email Address:

Username: Domain:

Administrative School: Default School:

1. In the **School** drop-down list, select the district or building to which the role grants access.
2. In the **Role** drop-down list, select the role you wish to assign to the account(s).
3. In any of the following fields, enter or select search criteria to locate the account(s):
 - For the **Last Name**, **First Name**, **Email Address**, and **Username** fields, enter a partial or full value by which to search.

Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.

- **Domain** – Select the domain associated with the account(s) for which you are searching.

- **Administrative School** – Select the administrative school associated with the account(s) for which you are searching.
 - **Default School** – Select the default school associated with the account(s) for which you are searching.
4. Click **Search**. A dual listbox of account usernames whose information matches your search criteria displays.

5. In the **Available** listbox on the left, select the accounts to which you wish to assign the selected role, then click to move them to the **Assigned** listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrows icon to move accounts between the 2 listboxes)
6. Click **Save Assigned Accounts**.

Note: The **Accounts Assigned Role at a Higher Level** grid lists accounts that have already been assigned the selected role at a higher level. For example, account 123 is assigned the **Truant Reports** role for ABC Local Schools. When the security administrator selects a **School of ABC High School** (part of ABC Local Schools) and a **Role of Truant Reports**, account 123 displays in the **Accounts Assigned Role at a Higher Level** grid.

Display Role Access

Navigation: StudentInformation > Management > Security > Display Role Access

The **Display Role Access** screen is a read-only screen that displays the sitemap access (see [“Sitemap Access”](#)) for a selected role.

1. In the **School** drop-down list, select the district or building to which the role grants access.
2. In the **Role** drop-down list, select the role whose sitemap access you wish to view.
3. (Optional) If you have privileged access (see [“Editing an Account”](#)), you can select the **Show All Fixed Roles** radio button to display access for all preset roles (see [“StudentInformation Preset Roles”](#)).

4. Click **Display Role Access**. The role(s) display with the corresponding nodes that have defined access settings.

Display Role Access

School: Role:

Show Selected Role Show All Fixed Roles

Role: SISFEES - Display

<input type="checkbox"/> Display:	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	Home	
<input type="checkbox"/> Display:	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	SIS	
<input type="checkbox"/> Display:	<input checked="" type="radio"/>	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	Fees
<input type="checkbox"/> Display:	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	Management	
<input type="checkbox"/> Display:	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	School Administration	
<input type="checkbox"/> Display:	<input checked="" type="radio"/>	<input type="button" value="Add"/>	<input type="button" value="Change"/>	<input type="button" value="Delete"/>	Fees Administration

Group Maintenance

Navigation: StudentInformation > Management > Security > View Groups

A group is a collection of accounts. Groups can be used for assignment of job functions and/or assignment of security access to accounts with similar functions.



Caution: Although you can create subgroups (groups within groups), please note that this functionality has not been thoroughly tested and is seldom used. This functionality is not recommended unless you have completed thorough testing.



Caution: The Copy Security portion of the go-live process does not support subgroups. If any district (in a Live or Play environment) uses subgroups, it causes any subsequent use of Copy Security on future go-live processes to fail. Subgroups should not be used until all districts have been converted to StudentInformation and then only with detailed testing.



Caution: Job functions assigned through groups do not work with notifications. For more information about notifications, see the StudentInformation Notifications Guide.

Refer to any of the following sections:

- [“Searching for Groups”](#)
- [“Adding/Editing Groups”](#)
 - [“Group Tab”](#)
 - [“Group Roles Tab”](#)
 - [“Group Assigned Groups Tab”](#)
 - [“Group Members Tab”](#)
 - [“Member Of Tab”](#)

Searching for Groups

Navigation: StudentInformation > Management > Security > View Groups

View Groups

School: Group Name: Show Active Only

1. In the **School** drop-down list, select the district or building that is the administrative school for the group.

Note: You must have administrative access to the district or building that is the administrative school for the group in order to search for it.

2. In the **Group Name** field, enter a full or partial group name, and then click **Search**.

Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.

Note: You can leave the **Group Name** field blank to return a list of all groups for the selected district or building.

A grid of groups that meet the search criteria displays.

View Groups

School: Group Name: Show Active Only

		Group Name	School	Active
		ABCD- Full	Test School District	●
		ABCD - full + emis	Test School District	●
		ABCD - Teacher	Test High School	●
		ABCD - Principal	Test High School	●

3. You can now perform any of the following options:
 - Click **Add New Group** to create a new group (see [“Adding/Editing Groups”](#)).
 - Click in the row of the group you wish to modify or whose details you wish to review (see [“Adding/Editing Groups”](#)).
 - Click in the row of the group you wish to delete.

Adding/Editing Groups

Group Tab

Navigation: StudentInformation > Management > Security > View Groups > Add/Edit Group > Group tab

On this tab, you can add or modify the name, administrative school, and job functions for a group.

1. In the **Group Name** field, enter or modify the name of the group.
2. In the **Administrative School** drop-down list, select the ITC, district, or building that should have administrative access to the group.
3. In the **Context School** drop-down list, select the district or building to which the following job function selections should apply for the group.
4. In the **Job Functions** section, select the checkbox beside each job function you wish to apply to the group.

Note: The combination of the **Context School** drop-down list and **Job Functions** checkboxes determine the items that display on the Portal screen for users in this group. Portal items have a defined **Intended Audience** grid that specifies the context school and job function(s) to which they apply, and only roles with the appropriate context school and job function(s) can view the items on the Portal screen.

Note: While you can assign a group to an account, the job functions selected do not apply until a staff member is associated with the account.

Note: GradeBook-specific job functions cannot be assigned using groups. See [“Appendix F: Job Function Access”](#) to view a list of all job functions and the access they grant.

5. Click **Save**. If you are adding a new group, you can now access other relevant tabs for the group.

Group Roles Tab

Navigation: StudentInformation > Management > Security > View Groups > Add/Edit Group > Group Roles tab

On this tab, you can review or modify the roles that apply to accounts associated with this group.

Security - Group: ABCD - Full

Group | **Group Roles** | Group Assigned Groups | Group Members | Member Of

School: All Buildings | Role: Additional EMIS | Add

	School	Role
	ABCD School District	Portal - View
	ABCD School District	SIS - Manager (Full Access)
	ABCD School District	Additional SIS
	ABCD School District	My Account - Role
	ABCD School District	EZQuery - All
	ABCD School District	Additional EMIS

Return To View Groups Page

To remove a specific school and role combination from the group, in the row of the combination, click .

To add roles to the group, complete the following steps:

1. In the **School** drop-down list, select the administrative school for the role you wish to add.
2. In the **Role** drop-down list, select the role you wish to add to the group. The list includes both preset roles and roles added by your school or district.
3. Click **Add**.

If the school and role combination you selected is unique (each role name can have only one administrative school), you receive a success message, and the new school and role combination display in the grid below.

4. (Optional) Click **Return to View Groups Page** to return to the **View Groups** screen.

Group Assigned Groups Tab

Navigation: StudentInformation > Management > Security > View Groups > Add/Edit Group > Group Assigned Groups tab

On this tab, you can review and/or assign other groups as subgroups (groups of groups).



Caution: Although you can create subgroups (groups within groups), please note that this functionality has not been thoroughly tested and is seldom used. This functionality is not recommended unless you have completed thorough testing.

Security - Group: ABCD - Full

Group
Group Roles
Group Assigned Groups
Group Members
Member Of

Filter List of Available Groups

School: All Schools Group Name: Search

Save Assigned Groups

Available

ABCD - full + emis
 ABCD- Teacher
 ABCD - Full
 ABCD - Admin

← →

← →

Assigned

(Empty)

Save

Return To View Groups Page

1. In the **Filter List of Available Groups** section, select a **School** from the drop-down list or enter a partial or full **Group Name** by which to populate the **Available** listbox in the **Save Assigned Groups** section.
2. Click **Search**.
A list of groups displays in the **Available** listbox.
3. The **Available** and **Assigned** dual listboxes let you specify the child groups that belong to this parent group. In the **Available** listbox on the left, select the groups you wish to assign to this parent group, then click → to move them to the **Assigned** listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move groups between the 2 listboxes.)
4. Click **Save**.
5. (Optional) Click **Return to View Groups Page** to return to the **View Groups** screen.

Group Members Tab

Navigation: StudentInformation > Management > Security > View Groups > Add/Edit Group > Group Members tab

This tab displays a grid of all accounts or subgroups that are associated with the group.

- To add or remove group associations for an account, see [“Adding/Editing Groups.”](#)
- To add or remove subgroups, see [“Group Tab.”](#)

Type	Last/Group Name	First Name	School	Username	Domain
Group	ABCD - Admin				
Account	Test8502	Test8502	Ashland City Schools	test8502	ProgressBook
Account	TestUser	A	Ashland City Schools	atestuser	ProgressBook

- **Type** – Indicates whether the item is associated with an account or group.
- **Last/Group Name**
 - If the item is a group association, this column displays the name of the group. Click the name to navigate to the **Security - Group: [group name]** screen **Group** tab for that group.
 - If the item is an account association, this column displays the last name of the account. Click the name to navigate to the user record screen **Account** tab for the account.
- **School** – Administrative school of the account or group.
- **Username** – Username for the account.
- **Domain** – Domain of the account or group.
- **Return to View Groups Page** – Click to return to the **View Groups** screen.

Member Of Tab

Navigation: StudentInformation > Management > Security > View Groups > Add/Edit Group > Member Of tab

This tab displays a grid of all parent groups to which this group belongs.

To add or remove children groups from a parent group, see [“Group Assigned Groups Tab.”](#)

Security - Group: ABCD - Full

Group
Group Roles
Group Assigned Groups
Group Members
Member Of

Name	School
All Users	All Buildings

- **Name** – Name of the group to which this subgroup belongs.
- **School** – Administrative school of the parent group.
- **Return to View Groups Page** – Click to return to the **View Groups** screen.

Account Maintenance

Navigation: StudentInformation > Management > Security > View Accounts

Users must have an account to access DataMap, GradeBook, SpecialServices, SpecialServices Classic, and StudentInformation. You can assign roles and groups to accounts to determine the account’s security access across the suite (see [“Role Maintenance”](#) and [“Group Maintenance”](#)).

Refer to any of the following sections:

- [“Searching for Accounts”](#)
- [“Adding an Account”](#)
 - [“Adding a ProgressBook Account”](#)
 - [“Adding a Windows Account”](#)
 - [“Adding an LDAP Account”](#)
- [“Editing an Account”](#)
- [“Assigning/Removing Roles”](#)
- [“Assigning/Removing Groups”](#)
- [“Adding/Removing Staff Member Impersonations”](#)
- [“Resetting a Password”](#)

Searching for Accounts

Navigation: StudentInformation > Management > Security > View Accounts

View Accounts

Last Name: First Name:

Email Address:

Username: Domain:

Administrative School: Default School:

Active:

1. In any of the following fields, enter or select search criteria.

- For the **Last Name**, **First Name**, **Email Address**, and **Username** fields, enter a partial or full value by which to search.

Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.

- **Domain** – Select the domain associated with the account(s) for which you are searching.
- **Administrative School** – Select the administrative school associated with the account(s) for which you are searching.
- **Default School** – Select the default school associated with the account(s) for which you are searching.
- **Active** – Deselect this checkbox to search for both active and inactive accounts.

2. Click **Search**.

A grid of accounts that meet the search criteria displays. You can sort by any column (**Domain**, **Username**, **First Name**, **Last Name**, **Email**, **Administrative School**, **Default School**) in ascending or descending order by clicking the column header.

View Accounts

Last Name: First Name:

Email Address:




Username: Domain:

Administrative School: Default School:

Active:

	Domain	Username	First Name	Last Name ▲	Email	Administrative School	Default School	Account Type	Active
	ProgressBook	testab	testa	testb	testa@email.com	Test School District	Test School District	ProgressBook	●
	ProgressBook	atestuser	A	TestUser	atestuser@email.com	Test School District	Test Middle School	ProgressBook	●

3. (Optional) If you have add, edit, and/or delete access to accounts, you can now perform any of the following options:

- Click **New Account** to create a new account (see [“Adding an Account”](#)).
 - Click  in the row of the account you wish to modify or whose access you wish to view (see [“Editing an Account”](#)).
 - Click  in the row of the account you wish to inactivate.
4. (Optional) If you have read-only access to accounts, you can click  in the row of the account whose details you wish to view.

View Accounts





Last Name: First Name:

Email Address:

Username: Domain:

Administrative School: Default School:


Active:

	Domain	Username	First Name	Last Name ▲	Email	Administrative School	Default School	Account Type	Active
	ProgressBook	jhurd	Janice	Hurd	jhurd@email.com	Test City Schools	Test City Schools	ProgressBook	
	ProgressBook	pmiller	Patrick	Miller	pmiller@email.com	Test City Schools	Test City Schools	ProgressBook	

The read-only version of the user record screen **Account** tab displays.

Janice Hurd

At a Glance

Contact
 Email jhurd@email.com

Personal Account Staff

Account

Username* Domain* Account Type Active Privileged

Employee Number Administrative School* Default School*

Roles Groups Impersonations Reset Password

School	Role	Actions
--------	------	---------

Adding an Account

Navigation: StudentInformation > Management > Security > View Accounts

OR

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account

OR

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member

When you click **New Account** on the **View Accounts** screen or the user record screen, a window opens, and prompts you to enter key information.

Note: When you create a new account that does not have an associated staff member record, on the **Personal** tab, a personal record that contains relevant information from the account is created (see [“Personal Information Maintenance”](#)).

The screenshot shows a dialog box for adding a new account. It features five input fields, each with a red asterisk indicating it is required: 'First Name', 'Last Name', 'Email Address', 'Username', and 'Domain'. The 'Domain' field is a dropdown menu with the text 'Select an item...' and a downward arrow. At the bottom right of the dialog, there are two buttons: a grey 'Cancel' button and a blue 'Add New Account' button.

The fields on the window update based on your selected domain. View the following steps based on the type of domain account you are creating:

- [“Adding a ProgressBook Account”](#)
- [“Adding a Windows Account”](#)
- [“Adding an LDAP Account”](#)

Adding a ProgressBook Account

First Name*

Nick

Last Name*

Miller

Email Address*

nmiller@email.com

Username*

nmiller

Domain*

ProgressBook

Account Type: ProgressBook

Password*

Confirm Password*

Cancel Add New Account

1. In the **First Name** and **Last Name** fields, enter the first and last name of the user you wish to add.
2. In the **Email Address** field, enter a unique email address for the user.
3. In the **Username** field, enter the unique username for the user to use to log in to any available ProgressBook application.
4. In the **Domain** drop-down list, select **ProgressBook**.
5. In the **Password** and **Confirm Password** fields, enter and confirm the password for the account.
6. Click **Add New Account**.
 - If no matching staff member records exist, the user record screen **Account** tab displays for the newly created account (see [“Editing an Account”](#)).
 - If an account with a matching first and last name and/or email address exists, you can edit the account by clicking **Edit Existing Account**. The user record screen **Account** tab displays for the matching account.
 - If an unmigrated account with a matching email address and/or username and domain already exists, you can complete the account creation process for that account.
 - If a staff member record with a matching first and last name and/or email address exists, you can associate the new account with the existing staff member record by clicking **Create Associated Account** below the corresponding record. Otherwise,

you can click **Create Unassociated Account**. In either situation, the user record screen **Account** tab displays for the newly created account (see [“Editing an Account”](#)).

The screenshot shows the user record for Janice Hurd. The 'Account' tab is active, displaying the following information:

- Username:** jhurd
- Domain:** ProgressBook
- Account Type:** ProgressBook
- Employee Number:** (empty)
- Administrative School:** Test City Schools
- Default School:** Test City Schools
- Active/Privileged:** Active (checked), Privileged (unchecked)

Below the account information, there are four tabs: Roles, Groups, Impersonations, and Reset Password. The Roles tab is selected, showing a form with two dropdown menus for 'School' and 'Role', and an 'Add Role' button. Below the form is a table with columns for School, Role, and Actions.

Note: The first and last name from the **Personal** tab of the user whose record you are viewing display at the top left of the user record screen, and their email address from the **Personal** tab displays in the **At a Glance** section (see [“Personal Information Maintenance”](#)).

- (Optional) On the user record screen, click any of the following tabs to modify security assignments for the account:
 - Roles** (see [“Assigning/Removing Roles”](#))
 - Groups** (see [“Assigning/Removing Groups”](#))
 - Impersonations** (see [“Adding/Removing Staff Member Impersonations”](#))
 - Reset Password** (see [“Resetting a Password”](#))

Adding a Windows Account

First Name*
Nick

Last Name*
Miller

Email Address*
nmiller@email.com

Username*
nmiller

Domain*
software-answers.com

Account Type: Windows

The selected domain uses an external user directory.

I will manually create the user in the external directory.

Attempt to automatically create the user in the external directory.

Password*

Confirm Password*

Cancel Add New Account

1. In the **First Name** and **Last Name** fields, enter the first and last name of the user you wish to add.
2. In the **Email Address** field, enter a unique email address for the user.
3. In the **Username** field, enter the unique username for the user to use to log in to any available ProgressBook application.
4. In the **Domain** drop-down list, select the configured Windows domain (see the *ProgressBook CentralAdmin Guide* for more information on configuring domains).
5. Select either of the following options:
 - a. Leave the **I will manually create the user in the external directory** radio button selected if you or another administrator will create the corresponding account in the external user directory.
 - b. Select the **Attempt to automatically create the user in the external directory** radio button if you wish to attempt to automatically create the corresponding account in the external user directory.

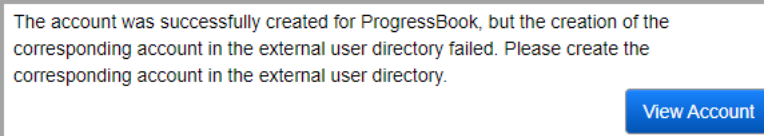
The success of this process depends on the configuration of the external user directory. Only the following information is submitted to the external user directory from StudentInformation: email address, first name, last name, password, and username.

- i. In the **Password** and **Confirm Password** fields, enter and confirm the password for the account.

6. Click **Add New Account**.

- If the automatic account creation in the external user directory was unsuccessful, you receive the following message: **The account was successfully created for ProgressBook, but the creation of the corresponding account in the external user directory failed. Please create the corresponding account in the external user directory.**

Click **View Account** to collect the details of the user record screen **Account** tab and **Personal** tab, and then provide the information to your external user directory administrator so that they can add the corresponding account in the external user directory.



- If no matching staff member records exist, the user record screen **Account** tab displays for the newly created account (see *"Editing an Account"*).
- If an account with a matching first and last name and/or email address exists, you can edit the account by clicking **Edit Existing Account**. The user record screen **Account** tab displays for the matching account.
- If an unmigrated account with a matching email address and/or username and domain already exists, you can complete the account creation process for that account.
- If a staff member record with a matching first and last name and/or email address exists, you can associate the new account with the existing staff member record by clicking **Create Associated Account** below the corresponding record. Otherwise,

you can click **Create Unassociated Account**. In either situation, the user record screen **Account** tab displays for the newly created account (see [“Editing an Account”](#)).

The screenshot shows the user record for Janice Hurd. The 'Account' tab is active, displaying the following information:

- Username:** jhurd
- Domain:** ProgressBook
- Account Type:** ProgressBook
- Employee Number:** (empty)
- Administrative School:** Test City Schools
- Default School:** Test City Schools

Additional features include:

- Buttons:** New Account, New Staff, Edit Account.
- Form Fields:** Username*, Domain*, Account Type, Employee Number, Administrative School*, Default School*.
- Form Elements:** Active, Privileged.
- Navigation:** Roles, Groups, Impersonations, Reset Password.
- Role Management:** School (Select...), Role (Select...), Add Role button.
- Table:** A table with columns for School, Role, and Actions.

Note: The first and last name from the **Personal** tab of the user whose record you are viewing display at the top left of the user record screen, and their email address from the **Personal** tab displays in the **At a Glance** section (see [“Personal Information Maintenance”](#)).

- (Optional) On the user record screen, click any of the following tabs to modify security assignments for the account:
 - Roles** (see [“Assigning/Removing Roles”](#))
 - Groups** (see [“Assigning/Removing Groups”](#))
 - Impersonations** (see [“Adding/Removing Staff Member Impersonations”](#))
 - Reset Password** (see [“Resetting a Password”](#))

Adding an LDAP Account

First Name*

Last Name*

Email Address*

Username*

Domain*

Account Type: Ldap

The selected domain uses an external user directory.

I will manually create the user in the external directory.

Attempt to automatically create the user in the external directory.

Password*

Confirm Password*

For authentication purposes, please re-enter your username and password for the external user directory.

Username*

Password*

Cancel Add New Account

1. In the **First Name** and **Last Name** fields, enter the first and last name of the user you wish to add.
2. In the **Email Address** field, enter a unique email address for the user.
3. In the **Username** field, enter the unique username for the user to use to log in to any available ProgressBook application.
4. In the **Domain** drop-down list, select the configured LDAP domain (see the *ProgressBook CentralAdmin Guide* for more information on configuring domains).
5. Select either of the following options:
 - a. Leave the **I will manually create the user in the external directory** radio button selected if you or another administrator will create the corresponding account in the external user directory.

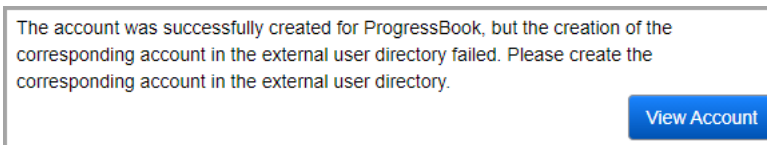
- b. Select the **Attempt to automatically create the user in the external directory** radio button if you wish to attempt to automatically create the corresponding account in the external user directory.

The success of this process depends on the configuration of the external user directory. Only the following information is submitted to the external user directory from StudentInformation: email address, first name, last name, password, and username.

- i. In the **Password** and **Confirm Password** fields, enter and confirm the password for the account.
 - ii. In the **Username** and **Password** fields, enter your username and password to authenticate to the external user directory that you are the person adding the new account. This prevents any unauthorized creation of accounts.
6. Click **Add New Account**.

- If the automatic account creation in the external user directory was unsuccessful, you receive the following message: **The account was successfully created for ProgressBook, but the creation of the corresponding account in the external user directory failed. Please create the corresponding account in the external user directory.**

Click **View Account** to collect the details of the user record screen **Account** tab and **Personal** tab, and then provide the information to your external user directory administrator so that they can add the corresponding account in the external user directory.



- If no matching staff member records exist, the user record screen **Account** tab displays for the newly created account (see [“Editing an Account”](#)).
- If an account with a matching first and last name and/or email address exists, you can edit the account by clicking **Edit Existing Account**. The user record screen **Account** tab displays for the matching account.
- If an unmigrated account with a matching email address and/or username and domain already exists, you can complete the account creation process for that account.
- If a staff member record with a matching first and last name and/or email address exists, you can associate the new account with the existing staff member record by clicking **Create Associated Account** below the corresponding record. Otherwise,

you can click **Create Unassociated Account**. In either situation, the user record screen **Account** tab displays for the newly created account (see [“Editing an Account”](#)).

The screenshot shows the user record for Janice Hurd. The 'Account' tab is active, displaying the following information:

- Username:** jhurd
- Domain:** ProgressBook
- Account Type:** ProgressBook
- Active/Privileged:** Active (checked), Privileged (unchecked)
- Employee Number:** (empty)
- Administrative School:** Test City Schools
- Default School:** Test City Schools

Below the account information, there are four tabs: Roles, Groups, Impersonations, and Reset Password. The Roles tab is selected, showing a form with two dropdown menus for 'School' and 'Role', and an 'Add Role' button. Below the form is a table with columns for School, Role, and Actions.

Note: The first and last name from the **Personal** tab of the user whose record you are viewing display at the top left of the user record screen, and their email address from the **Personal** tab displays in the **At a Glance** section (see [“Personal Information Maintenance”](#)).

- (Optional) On the user record screen, click any of the following tabs to modify security assignments for the account:
 - Roles** (see [“Assigning/Removing Roles”](#))
 - Groups** (see [“Assigning/Removing Groups”](#))
 - Impersonations** (see [“Adding/Removing Staff Member Impersonations”](#))
 - Reset Password** (see [“Resetting a Password”](#))

Editing an Account

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account

The screenshot shows the 'Account' tab in a user record screen. The 'Edit Account' button is highlighted with a red box. The form contains the following fields and options:

- Username***: jmilller
- Domain***: ProgressBook
- Account Type**: ProgressBook
- Active**: Active Privileged
- Employee Number**: (empty)
- Administrative School***: All Buildings
- Default School***: All Buildings

Below the form are tabs for **Roles**, **Groups**, **Impersonations**, and **Reset Password**. At the bottom, there are dropdown menus for **School** and **Role**, and an **Add Role** button.

1. On the user record screen **Account** tab, click **Edit Account**.
2. (Optional) You can modify any of the required fields: **Username**, **Domain**, **Administrative School**, and **Default School**.



Caution: Updating an account's username may affect the user's ability to log in to ProgressBook.



Caution: If you wish to change the account's **Domain** to one with an external user directory, ensure that the external user directory contains the corresponding account information before changing the domain.

3. (Optional) Add or modify the **Employee Number**.
4. (Optional) Deselect the **Active** checkbox to inactivate the account. Users cannot log in with inactive accounts.
5. (Optional) If you have the appropriate permissions, you can select or deselect the **Privileged** checkbox to grant or remove access privileges (see ["Appendix B: Privileged Access"](#)).
6. Click **Save**.
7. (Optional) Click any of the following tabs to view or modify security assignments for the account:
 - **Roles** (see ["Assigning/Removing Roles"](#))
 - **Groups** (see ["Assigning/Removing Groups"](#))
 - **Impersonations** (see ["Adding/Removing Staff Member Impersonations"](#))
 - **Reset Password** (see ["Resetting a Password"](#))

Assigning/Removing Roles

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account > Roles tab

You can assign roles to accounts to grant them sitemap and resource permissions for DataMap, Reporting, SpecialServices, and/or StudentInformation.

School	Role	Actions
Test High School	Additional SIS	[trash icon]

- To assign a role to the account, complete the following steps:
 - In the **School** drop-down list, select the school or district to which the account should have access.
 - In the **Role** drop-down list, select the corresponding role that grants the access needed.
 - Click **Add Role**.
The new role and its corresponding school display in the grid.
- To remove a role, in its corresponding row, click .

Assigning/Removing Groups


Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account > Groups tab

You can assign groups to a collection of accounts for assignment of job functions and/or assignment of roles.

School	Group	Actions
Test City Schools	THS - Teacher	[trash icon]

- To assign a group to the user's account, complete the following steps:
 - In the **School** drop-down list, select the school or district to which the account should have group access.
 - In the **Group** drop-down list, select the corresponding group that grants the access needed.
 - Click **Add Group**.

The new group and its corresponding school display in the grid.

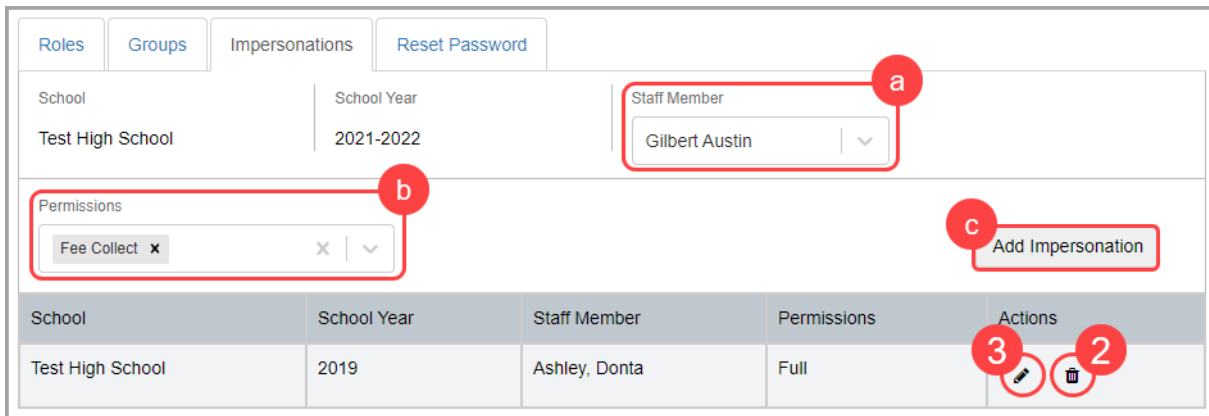
2. To remove a group, in its corresponding row, click  .



Adding/Removing Staff Member Impersonations

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account > Impersonations tab

Staff member impersonations let a user complete tasks as if they were the staff member whom they are impersonating. Accounts can also impersonate all staff members in the school if needed.

Note: The *School* and *School Year* values autopopulate based on the district/school and school year in context.





School	School Year	Staff Member	Permissions	Actions
Test High School	2019	Ashley, Donta	Full	 

1. To assign a staff member impersonation to the user's account, complete the following steps:
 - a. In the **Staff Member** drop-down list, select the staff member whose access you wish to have the user's account impersonate. The list is based on the school district of the school in context.

Note: The user's account with the staff member impersonation still needs to be assigned the appropriate role that grants access to the actual screen; the impersonation gives them only the privilege to view the data on the screen as if they were the staff member they are impersonating.





- b. In the **Permissions** multi-select list, select one or more of the corresponding permissions the impersonation grants:
 - **Full** – Can access all permissions listed below.
 - **Fee Collect** – Can collect full fee payments using the **Teacher Menu**.
 - **EZ Query** – Can view students in EZ Query.
 - **Attendance** – Can take attendance using the **Teacher Menu**.
 - **Marks** – Can enter marks using the **Teacher Menu**.
 - **Medical** – Can view private medical information using the **Teacher Menu**.
- c. Click **Add Impersonation**.

The new impersonation and its corresponding details display in the grid.

- To remove an impersonation, in its corresponding row, click  .
- To edit an impersonation, in its corresponding row, click  . New actions are now available in the **Permissions** and **Actions** columns.

Note: You cannot modify the **School**, **School Year**, or **Staff Member** selections.

School	School Year	Staff Member	Permissions	Actions
Test High School	2020	Booker, Fabian	<div style="border: 1px solid #ccc; padding: 2px;"> Full x x v </div>	<div style="border: 1px solid #ccc; padding: 2px;"> ✓ x </div>

- (Optional) To remove the existing permissions granted, in the **Permissions** column, click  beside each listed permission.
- (Optional) To add more permissions, in the **Permissions** column, click  and select the permissions you wish to add.
- Click  to save your changes, or click  to cancel your changes.

Resetting a Password

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account > Reset Password tab

If the user has a ProgressBook domain account or if the settings for the external user directory are properly configured, you can reset the account's password in StudentInformation.

Roles
Groups
Impersonations
Reset Password

Password*

Confirm Password*

Cancel
Reset


- In the **Password** and **Confirm Password** fields, enter the reset password for the account.
- Click **Reset**.

The user's account password is now reset. If the user is on the ProgressBook domain, after the user first logs in with the new password, they are required to enter a new password.

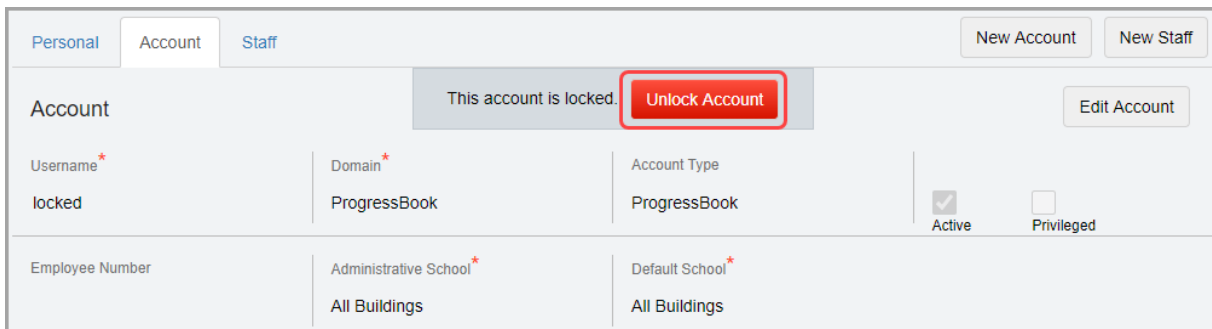
Unlocking Accounts (ProgressBook Accounts Only)

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account

When a user's number of failed attempts to log in exceeds the specified limit in CentralAdmin (refer to the *ProgressBook CentralAdmin User Guide*), their account is locked, and you can unlock the account in StudentInformation.

1. Locate the locked account (see [“Searching for Accounts”](#)).
2. In the row of the account you wish to unlock, click .

The user record screen displays with the **This account is locked** message.



3. Click **Unlock Account**.

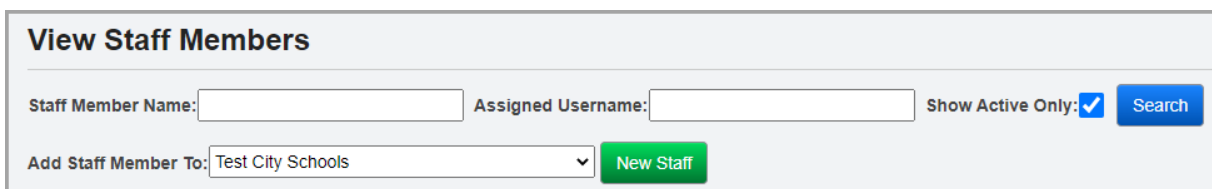
The user's account is unlocked, and the user can attempt to log in.

Staff Maintenance

Navigation: StudentInformation > Management > Security > View Staff Members

A staff member represents a district employee. Staff members can be assigned job functions for specific school years, which grants them specific access to StudentInformation, GradeBook, and DataMap. A user can have more than one staff member record associated with a single account, i.e., one staff member record for each district in which they serve (e.g., ESC staff members; see [“ESC Account Management”](#)).

Note: All users who need to log in to GradeBook must have a staff member record associated with their account (see [“Account Maintenance”](#)), and the staff member record must have the corresponding job functions assigned (see [“Assigning/Removing Schools”](#)).



Searching for Staff Members

Navigation: StudentInformation > Management > Security > View Staff Members

View Staff Members

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

Add Staff Member To: New Staff

1. In the **Staff Member Name** and/or **Assigned Username** fields, enter a partial or full value by which to search.

Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.

Note: The **Staff Member Name** search looks at only staff members' last name values in the database. Enter a full or partial last name of the staff member for which you are searching to locate them.

2. (Optional) Deselect the **Show Active Only** checkbox to search for both active and inactive staff members.
3. Click **Search**.

A grid of staff members that meet the search criteria displays.

View Staff Members

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

Add Staff Member To: New Staff

		Last Name	First Name	Staff Code	District	Domain	Username	Active
		mtest	mtest	mtest	Test District Schools	ProgressBook	m	●
		test	abcde	123456	Test District Schools			●
		Test	Ima	abcd	Test District Schools			●

4. (Optional) If you have add, edit, and/or delete access to staff records, you can now perform any of the following options:
 - In the **Add Staff Member To** drop-down list, select the district or building to which you want to add a staff member, then click **New Staff** to create a new staff member record (see [“Adding Staff Members”](#)).
 - Click in the row of the staff member record you wish to modify or whose access you wish to view (see [“Editing Staff Members”](#)).
 - Click in the row of the staff member record you wish to inactivate.
5. (Optional) If you have read-only access to staff records, you can click in the row of the staff member whose details you wish to view.

The read-only version of the user record screen **Staff** tab displays.

Adding Staff Members

Navigation: StudentInformation > Management > Security > View Staff Members

OR

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member

OR

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account

When you click **New Staff** on the **View Staff Members** screen or the user record screen, a window opens, and prompts you to enter key information.

Users who wish to add staff members must be assigned a role that has **Add**, **Change**, and **Delete** access enabled for the **Add/Edit Personal** security node in addition to **Add**, **Change**, and **Delete** access enabled for the **View/Edit Staff Member** security node.

Note: When you click **New Staff** on the user record screen to create a new staff member record, the district/building in context determines the district to which the staff member is added.

Note: If you are on the user record screen **Account** tab or **Personal** tab, you can click the **Staff** tab and then click **Edit Staff** to create the staff member record. The **First Name**, **Last Name**, and **Email Address** fields are autopopulated based on information from the **Personal** tab, and you can modify them for the staff member record if needed (see [“Personal Information Maintenance”](#)).

Note: When you create a new staff member record that does not have an associated account, on the **Personal** tab, a personal record that contains relevant information from the staff member record is created (see [“Personal Information Maintenance”](#)).

First Name ^{*}

Last Name ^{*}

Email Address ^{*}

Staff Code ^{*}

State Staff ID ^{*}

State staff ID unavailable

1. In the **First Name** and **Last Name** fields, enter the first and last name of the user you wish to add.
2. In the **Email Address** field, enter a unique email address.
3. In the **Staff Code** field, enter a 4-character code that uniquely identifies the staff member.
4. In the **State Staff ID** field, enter the unique state-generated ID for the staff member; this ID can consist of 999999999 or 2 letters followed by 7 numbers. This ID is also known as the credential ID and is used for pre-identification exports, student subject records, program records or contracted staff, and ODE's D3A2 initiative.

Note: *The **State Staff ID** field is required unless a state staff ID is unavailable (e.g., the staff member is a College Credit Plus teacher).*

5. (Optional) If the staff member does not have a state staff ID, select the **State staff ID unavailable** checkbox.
6. Click **Add New Staff**.
 - If there are no existing matching staff members, the user record screen **Staff** tab displays for the newly created staff member (see ["Editing Staff Members"](#)).
 - If a staff member with a matching first and last name and/or email address exists, you can choose to edit the staff member record by clicking **Edit existing Staff**. The user record screen **Staff** tab displays for the existing staff member.
 - If an unmigrated account with a matching email address already exists, you must complete the account creation process for that email address before you can create the staff record (see ["Adding an Account"](#)).
 - If an account with a matching first and last name and/or email address exists, you can choose to associate the new staff member with the existing account by clicking **Create Associated Staff** below the corresponding record. Otherwise, you can click **Create Unassociated Staff**. In either situation, the user record screen **Staff** tab displays for the newly created account (see ["Editing Staff Members"](#)).

Janice Hurd

At a Glance

Contact

✉ Email jhurd@email.com

Personal
Account
Staff

New Account
New Staff

Edit Staff

First Name	Middle Name	Last Name
Mrs		Hurd
Phone Number	<input type="checkbox"/> Phone number unlisted	Email Address
Staff Code*	State Staff ID	<input checked="" type="checkbox"/> State staff ID unavailable
123456		
Primary School	Start mm/dd/yyyy	Stop mm/dd/yyyy
Comments <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>		<input type="checkbox"/> Active
School	Year	Job Functions
<input type="text" value="Select..."/>	<input type="text" value="Select..."/>	<input type="text" value="Select..."/>
<input type="checkbox"/> Allow staff member to view all students in EZ Query		Add School

School	School Year	Job Function	EZ Query	Active	Actions
--------	-------------	--------------	----------	--------	---------

Note: If you have access to view account information, the first and last name from the **Personal** tab of the user whose record you are viewing display at the top left of the user record screen, and their email address from the **Personal** tab displays in the **At a Glance** section (see [“Personal Information Maintenance”](#)).

7. (Optional) You can now add schools and job functions for the staff member (see [“Assigning/Removing Schools”](#)).

Editing Staff Members

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member

1. On the user record screen **Staff** tab, click **Edit Staff**.

Personal	Account	Staff
		<div style="text-align: right;"> <input type="button" value="New Account"/> <input type="button" value="New Staff"/> </div>
Staff		<input type="button" value="Edit Staff"/>
First Name abcde	Middle Name	Last Name test
Phone Number	<input type="checkbox"/> Phone number unlisted	Email Address test@abcde.com
Staff Code * 123456	State Staff ID	<input checked="" type="checkbox"/> State staff ID unavailable
Primary School Select an item...	Start mm/dd/yyyy	Stop mm/dd/yyyy
Comments <input type="text"/>		<input type="checkbox"/> Active

2. (Optional) You can modify the **Staff Code** and **State Staff ID**.
3. (Optional) You can add or modify the following fields: **First Name**, **Middle Name**, **Last Name**, **Phone Number**, **Email Address**, **Primary School**, **Start** date, **Stop** date, and **Comments**.

Note: You can update the **First Name** and **Last Name** fields so that staff names display differently in GradeBook than in StudentInformation. For example, a teacher can have the name Janice Hurd on the **Personal** tab and therefore it displays as such in StudentInformation drop-down lists, and the name Mrs. Hurd on the **Staff** tab and therefore it displays as such in GradeBook for students.

4. (Optional) If the staff member's phone number is unlisted, select the **Phone number unlisted** checkbox.
5. (Optional) If the staff member does not have a state staff ID, select the **State staff ID unavailable** checkbox.
6. (Optional) Deselect the **Active** checkbox to inactivate the account. Users cannot log in with inactive accounts.
7. Click **Save**.
8. (Optional) You can add, modify, or remove schools and job functions for the staff member (see "[Assigning/Removing Schools](#)").

Assigning/Removing Schools

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member

You can assign active schools/districts and job functions to the appropriate staff members. The school assigned determines the building and/or district in which the staff member has appropriate access based on their assigned job function(s).

Most job functions grant staff members specific access to parts of StudentInformation, GradeBook, and/or DataMap, as well as identify the corresponding drop-down lists to which the staff member name should populate (see [“Appendix F: Job Function Access”](#)). Other job functions give districts a way to use reports to track the types of staff members they have.

Note: When you add job functions for non-teaching staff members who use GradeBook, the job function must be assigned at the building level to their primary building. Each job function assigned to the user displays in GradeBook as a separate record; e.g., if you assign a user both the Principal and School Admin job functions in StudentInformation for Test High School in FY21, in GradeBook, there will be one record for Principal and one record for School Admin for Test High School in FY21 in GradeBook. You can then assign any additional schools as needed per job function in GradeBook. For more information, see [“Setting Up GradeBook Accounts.”](#)

Note: If the user’s job function requires access to multiple schools in GradeBook, you can grant access to other schools in the district in GradeBook on the **Update Staff** window **Schools** tab. Granting staff access to multiple buildings in GradeBook this way also grants them access to additional buildings in SpecialServices Classic. See [“Setting Up GradeBook Accounts”](#) and [“Setting Up SpecialServices Classic Accounts.”](#)



Caution: You can create staff records without associated accounts to track their records. However, users without an account cannot log in to ProgressBook.


School	Year	Job Functions			
Test High School	2020-2021	Teacher			
<input type="checkbox"/> Allow staff member to view all students in EZ Query			<input type="button" value="Add School"/>		
School	School Year	Job Function	EZ Query	Active	Actions
Test High School	2019-2020	Teacher	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

1. In the **School** drop-down list, select the building or district to which the selected job functions should apply.
2. In the **School Year** drop-down list, select the school year in which the selected job functions should apply.

Security Maintenance


- (Optional) In the **Job Functions** multi-select list, select the job function(s) that should apply to the staff member for the selected school. For a list of all permissions granted by a job function, see [“Appendix F: Job Function Access”](#).
- (Optional) If you wish to grant the staff member access to some or all students only for the district or school to which they are assigned on the EZ Query **SIS Student Search** screen and **Upcoming Birthdays** screen, select or deselect the **Allow staff member to view all students in EZ Query** checkbox based on the information below.

Allow staff member to view all students in EZ Query checkbox	Teacher	Counselor	Not Specified	All Other Job Functions
Selected	Access to all students in their assigned district(s) or school(s)	Access to all students in their assigned district(s) or school(s)	Access to all students in their assigned district(s) or school(s)	Access to all students in their assigned district(s) or school(s)
Deselected	Access to students assigned to course sections or homerooms taught by only the teacher in the school and school year selected for the staff member	Access to students only to which only the counselor is assigned in the school and school year selected for the staff member	Access to only students assigned to homerooms they teach in the school and school year selected for the staff member	Access to all students in their assigned district(s) or school(s)

- Click **Add School**.
The selected school and job function(s) display in the grid.
- (Optional) Click  to inactivate a record.


Editing Schools

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member

- In the grid, in the row of the record you wish to modify, click . New actions are now available in the **Job Function**, **EZ Query**, **Active**, and **Actions** columns.

Note: You cannot modify the school and school year for existing records.

School	School Year	Job Function	EZ Query	Active	Actions
Test High School	2019-2020	<div style="border: 1px solid #ccc; padding: 2px;"> Teacher x x </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <input checked="" type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <input checked="" type="checkbox"/> </div>	<div style="border: 1px solid #ccc; padding: 2px;"> ✓ x </div>

- (Optional) To remove the existing job functions, in the **Job Function** column, click **x** beside each listed job function.
- (Optional) To add more job functions, in the **Job Function** column, click  and select the job function(s) you wish to add.
- (Optional) To enable or disable access to all students in EZ Query, in the **EZ Query** column, select or deselect the corresponding checkbox. For more information on this checkbox, see [“Assigning/Removing Schools.”](#)

5. (Optional) Deselect the **Active** checkbox to inactivate the record.
6. Click to save your changes, or click to cancel your changes.

Personal Information Maintenance

Navigation: StudentInformation > Management > Security > View Accounts > Add/Edit Account > Personal tab

OR

Navigation: StudentInformation > Management > Security > View Staff Members > View/Edit Staff Member > Personal tab

When you first create an unassociated account or staff member record, a corresponding personal record is created on the user record screen **Personal** tab, and it contains relevant information from the account or staff member record you created.

Once you have saved staff records with differing information from the **Personal** tab, when you update any fields on the **Personal** tab, matching fields in the **Staff** tab are not updated. This lets you maintain an overall personal record for the user while being able to maintain staff-specific information in a separate space, such as a personal email address on the **Personal** tab versus a school district email address on the **Staff** tab.

Janice Hurd

At a Glance

Contact
✉ Email jhurd@email.com

Personal
Account
Staff

New Account
New Staff

Personal

Prefix	First Name*	Middle Name	Last Name*	Suffix
	Janice		Hurd	

Edit Personal

Note: The first and last name from the **Personal** tab of the user whose record you are viewing display at the top left of the user record screen, and their email address from the **Personal** tab displays in the **At a Glance** section.

To edit a personal record, complete the following steps:

1. Click **Edit Personal**.

2. Update or enter any of the relevant fields: **Prefix, First Name, Middle Name, Last Name, Suffix, Address Line 1, Address Line 2, City, State, Zip, and Email Address.**
3. Click **Save**.

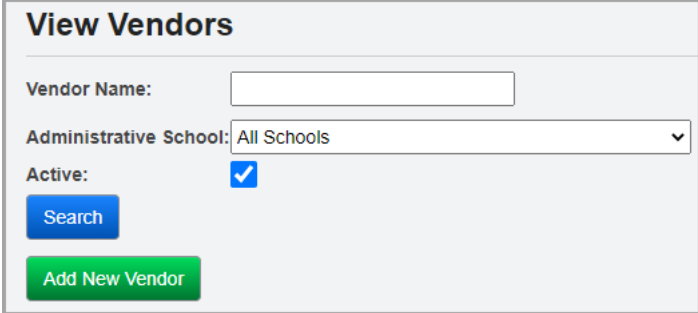
The changes display and matching fields on the **Account** or **Staff** tab are not updated.

Vendor Maintenance

Vendors must have an account in StudentInformation in order to access information in StudentInformation. All vendor accounts are created by ProgressBook Support, and the security administrator is responsible for assigning roles to grant vendors access in StudentInformation.

Searching for Vendor Accounts

Navigation: StudentInformation > Management > Security > View Vendors



The screenshot shows a web interface titled "View Vendors". It contains the following elements:

- A text input field labeled "Vendor Name:".
- A dropdown menu labeled "Administrative School:" with "All Schools" selected.
- A checkbox labeled "Active:" which is checked.
- A blue "Search" button.
- A green "Add New Vendor" button.

1. In any of the following fields, enter or select search criteria:
 - In the **Vendor Name** field, enter a partial or full value by which to search.
*Note: Use * as a wildcard before, after, or in between keywords to narrow your search results. The search is not case sensitive.*
 - **Administrative School** – Select the administrative school associated with the vendor account(s) for which you are searching.
 - **Active** – Deselect this checkbox to search for both active and inactive accounts.
2. Click **Search**.

A grid of vendor accounts that meet the search criteria displays. You can sort by any column (**Vendor Name**, **Administrative School**, **Central Linked**, **Active**) in ascending or descending order by clicking the column header.

View Vendors

Vendor Name:

Administrative School:

Active:

	Vendor Name ▲	Administrative School	Central Linked	Active
	ABC.Vendor123456	All Buildings	<input checked="" type="checkbox"/>	●
	DEF.Vendor456789	All Buildings	<input checked="" type="checkbox"/>	●
	GHI.Vendor987654	All Buildings	<input checked="" type="checkbox"/>	●

3. You can now perform either of the following:

- Click in the row of the vendor account you wish to modify or view access (see [“Viewing/Assigning Roles to a Vendor Account”](#)).
- Click in the row of the vendor account you wish to inactivate.



Caution: Never manually add a vendor account. Please contact ProgressBook Support if you need assistance.

Viewing/Assigning Roles to a Vendor Account

Navigation: StudentInformation > Management > Security > View Vendors > Add/Edit Vendor

Once you have located the vendor account (see [“Searching for Vendor Accounts”](#)), you can assign and remove roles as needed to ensure the vendor can access the information they need in StudentInformation.

1. On the **Security - Vendor: [vendor name]** screen, click the **Vendor Roles** tab.

A grid displays with any roles that have been assigned to the vendor account.

Security - Vendor: ABC.Vendor123456

Vendor | Vendor Roles

a School: **b** Role: **c**

School	Role
Test District Schools	VLK - Vendor - XYZ

2

2. (Optional) To assign a role to the vendor account, complete the following steps:
 - a. In the **School** drop-down list, select the school or district to which the vendor account should have access.
 - b. In the **Role** drop-down list, select the corresponding role that grants the access needed. For more information about roles, see ["Role Maintenance"](#)).
 - c. Click **Add**.

The assigned role displays in the grid below.

3. (Optional) Click  to remove a role.

Security Reports

Staff Listing (STAFF)

The **Staff Listing (STAFF)** report lets you display and sort staff members by job function and staff code.

Note: When you run this report at the district level, only staff members who have district access display. It does not display all staff members at the district. When you run this report at the building level, staff members only from that specific building display. Staff members with no job function display on the STAFF report with a job function of “Not Specified.”

Job Function – Choose one or more job functions assigned to staff members that you wish to include in the report.

Sorting Options – Select one or more sort options for your report.

Delivery Method (required) – Select how you want to receive the report:

- **Pickup** – Retrieve the report on the **Batch/Report Management** window.
- **Email Notification** – Receive an email with a link to the report when the report is ready to view.
- **Email Delivery** – Receive an email with the report included as a PDF attachment.

Email Address (autopopulated from your StudentInformation account)

Report Format – Select an output format of **Adobe PDF**, **Rich Text File (RTF)**, **Text**, **Excel Spreadsheet**, or **HTML**.

Description – If entered, displays on the **Batch/Report Management** window.

Submit – Click to submit this report to the **Batch/Report Management** window.

STAFF NAME	STAFF CODE	STATE STAFF ID	JOB FUNCTION	ADDRESS	ADDRESS LINE 2	City	STATE	ZipCode	Telephone
Hunters	HA		Teacher				OH		
Mrs. Christine	TC		Teacher						
Mrs. Kelly	HK		Teacher						
To Be Announced	HX		Teacher						
Mrs. Lynae	HL		Teacher						
Ms. Melissa	HM		Teacher						
Mrs. Katherine	HK		Principal						
Mr. Charles	HC		Teacher						
Ms. Martha	HM		Teacher						

Implementing Security

Suggested Practices

The following items are suggested practices for implementing security.

Determine Security Management Type

Determine the type of security management your district wants to use: ITC controlled, centralized, decentralized, or a combination.

- **ITC controlled** – All security administration is completed at the ITC level by ITC staff.
- **Centralized** – All security administration is completed at the district level by a typically small, centralized group of people.
- **Decentralized** – All security administration is completed at 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 the type of staff members you have and the type of access they should have. This information will help you determine the roles to use/create and groups to create and configure. Some questions you should consider are:

- Will teachers/secretaries/principals/guidance counselors at all the buildings in the district have the same access or will it vary by building?
- Will each of these groups of people have the same access in all buildings (whether they teach in that building or not) or only in the building(s) in which they work?
- What special supplemental jobs or tasks do staff members have that require additional access?

Review and Create Roles

You should review the list of pre-defined roles and determine which of these roles you want to use for which population of users. Do the pre-defined roles sufficiently provide the necessary access or are there gaps that require you to create your own roles for specific types of staff members or additional staff tasks?

With this information, you can create the roles that you need for your school and/or district. As you create these roles, use names that define the access you are granting.

- **Centralized** – Define the administrative school as the district and do not set any working schools.
- **Decentralized** – Each building creates their own roles and uses their building as the administrative school.
- **Combination** – District staff creates some roles for use by district staff only, and creates other roles where the working school is the building that is assigning the role.

ESC Account Management

ESC staff members frequently serve multiple schools. Here are some options for setting up ESC staff members.

If the ESC and the served schools are both on StudentInformation:

This method gives the ESC staff member a single StudentInformation user account with access to multiple school districts and buildings.

1. Set up the ESC staff member at the ESC in StudentInformation with a StudentInformation username and password.
2. The served school who wants the ESC staff member to have access to their StudentInformation data sets up a specific group/role with the privileges that give the ESC staff member the access they need for each building in the served school district.
3. Notify the ITC StudentInformation support of the applicable group/role so that they can assign it to the ESC staff member at the served school. The served school cannot do this themselves as they typically do not have access to that ESC staff member.

If the ESC is not on StudentInformation, but the served schools are on StudentInformation:

This method gives the ESC staff member a StudentInformation account for each school they serve. However, it works around the need for a unique email address for each StudentInformation user account.

1. Set up the ESC staff member in StudentInformation at each served school. The ESC staff member must have a separate StudentInformation username at each served school.
2. Use the ESC staff member's email address when creating the first StudentInformation account.
3. When creating subsequent StudentInformation accounts, you must use a unique email address. To work around this issue, a "+1", "+2", etc. can be added to the email address before the domain name. For example, chris+1@abcd.org and chris+2@abcd.org will both be sent to chris@abcd.org.

Appendices

The appendix contains specifics of the security system that help security administrators determine what to assign accounts and staff member records. Refer to any of the following sections for more information:

- [“Appendix A: Glossary”](#)
- [“Appendix B: Privileged Access”](#)
- [“Appendix C: Sitemap Access Details”](#)
- [“Appendix D: Resource Permissions Details”](#)
- [“Appendix E: Preset Roles”](#)
- [“Appendix F: Job Function Access”](#)

Appendix A: Glossary

account – The mechanism by which a user logs in to the system. All users (personnel) need an account in StudentInformation to log in to any ProgressBook application (e.g., DataMap, GradeBook). The account contains the username and password that the user would use to log in to ProgressBook. For more information, see [“Account Maintenance.”](#)

domain – A domain contains a group of user accounts by which users log in to ProgressBook (see [“Account Maintenance”](#)). For installations with trusts to district servers, several domain values may be available.

group – A collection of users and other groups. You can use groups for assignment of job functions and/or assignment of roles. For more information see [“Group Maintenance.”](#)

impersonation – The ability in StudentInformation for a user (typically administrative staff) to be able to complete tasks as if they were the staff member that they are impersonating (see [“Adding/Removing Staff Member Impersonations”](#)). For each staff member that a user impersonates, you must apply at least one staff user permission. Users can also impersonate all staff members in the school if needed.

job function – Most job functions grant staff members specific access to parts of StudentInformation, GradeBook, and/or DataMap as well as identify the corresponding drop-down lists to which the staff member name should populate (see [“Appendix F: Job Function Access”](#) and [“Staff Maintenance”](#)). Other job functions that do not grant access give districts a way to use reports to track the types of staff members they have. Groups with job functions applied also determine the information that the assigned accounts can see on the StudentInformation Portal (see [“Adding/Editing Groups”](#)).

node – An item on the sitemap permissions or resource permissions (see [“Adding/Editing Roles”](#)). Its name represents the corresponding screen or resource to which it provides access and is followed by the type(s) of access available.

personal record – The information that exists on the **Personal** tab of the user record screen that contains the shared data from the account and the staff member record for the user (see [“Personal Information Maintenance”](#)).

resource permission – Assign feature-based access to a role for Notifications, SpecialServices, and Reporting (see [“Resource Permissions”](#) and [“Appendix D: Resource Permissions Details”](#)).

role – Contains the sitemap and resource permissions that can be assigned to accounts (see [“Role Maintenance”](#)). While preset roles exist (see [“Appendix E: Preset Roles”](#)), you can also customize and create roles that grant appropriate security access to your personnel based on what each district or building needs.

school – An educational entity referenced in StudentInformation, often organized into a hierarchy. Refer to the following additional references to schools:

- **administrative school** – When associated, indicates the school that has the ability to manage the item in question. For example, on the **Manage Portal Announcements** window, if you wish to edit or remove an announcement, your account must have access to the administrative school listed for that announcement. Items such as accounts, groups, and roles also have administrative schools associated with them.
- **context school** – Used when maintaining groups (see [“Group Maintenance”](#)). The context school of a group indicates the school to which the group’s job functions apply.
- **default school** – The school designated as the working school when the user logs in to StudentInformation. You can change or set your default school.
- **selected schools** – The school(s) designated as the currently active school(s). Determines the schools that display in the EZ Query feature as well as the content that displays on the portal. You can save your selected schools for the current session or permanently.
- **working school/school in context** – The current school in which the user is working. Name of the school displays in the top-right corner of the screen.

sitemap access – Assign access to the role based on each screen in the StudentInformation sitemap (see [“Sitemap Access”](#)). Also includes some feature-based access for GradeBook, StudentInformation, DataMap, and VendorLink (see [“Appendix C: Sitemap Access Details”](#)).

staff member – A district employee. You can associate one staff member record per district for each account.

staff member record – The information that exists on the **Staff** tab of the user record screen (see [“Staff Maintenance”](#)). In addition to or instead of assigning role access, you can assign schools and/or job functions to the staff member to grant access across StudentInformation, GradeBook, and/or DataMap.

staff user permission – Designates what the user impersonating a staff member can do; i.e., **Full, Fee Collect, EZ Query, Attendance, Marks, and Medical** (see [“Adding/Removing Staff Member Impersonations”](#)).

user – The individual who is using the system and to whom the records belong (e.g., user’s staff member record).

vendor – Districts using ProgressBook VendorLink will have vendor accounts for their vendors set up in StudentInformation. Districts must assign roles and schools so that vendors can access the information they need (see [“Viewing/Assigning Roles to a Vendor Account”](#)).

Appendix B: Privileged Access

Selecting the **Privileged** checkbox on the user record screen **Account** tab grants the following access:

- Ability to select or deselect the **Privileged** checkbox for other accounts (see [“Editing an Account”](#)).

Appendices

- Access to all screens in StudentInformation
- All standard reports:
 - On the **Load Settings** tab, delete access to report parameter sets created by other users
 - On the **Batch/Report Management** window, view access to generated report PDF links created by other users
- In the **I Want To...** menu, access to all links
- On the **Batch Management** screen, view access to job details by clicking the **Referenceld** value
- On the **Display Role Access** screen, **Show Selected Role** and **Show All Fixed Roles** radio buttons display
- On the **School Demographics** screen, edit access to the following fields: **School Code**, **School Type**, **School Subtype**, **IRN**, and **Superintendent**
- On the **School Year Configuration** screen, **Unfinalize** schedule button displays
- On the following screens, grants the following access that is typically granted via specific sitemap permissions:

Screen	Access	Corresponding Sitemap Permission
Assign Roles to Accounts	Displays vendors	Add User -- As Vendor
Automatic Mark Maintenance	Add marks	Marks Cutoff Date
	Delete marks	
Bulk Course Section Assignment	Assign conflicted section	Assign Course Conflicts
Bulk Course Section Management	Assign conflicted section for course section transfers	Assign Course Conflicts
	Assign overfilled section for course section transfers	Overfill Course Sections
Calendar Dates Wizard	Edit past dates	Update past dates on calendar dates wizard
Contact Type Codes Maintenance	Code mapping	School - District Contact Code Mapping
Counselor Comment	Save comment	Marks Cutoff Date
Course Section Assignments	Assign conflicted section	Assign Course Conflicts
	Assign overfilled section	Overfill Course Sections
Course Section Exception Credit Maintenance	Save exception credits	Marks Cutoff Date
Daily Attendance by Classroom	Select Present , Late , or Absent radio button	Daily Attendance Extended Permissions
Download Class List	View SSID	View/Update State Student ID
Edit Student Profile	View/edit free/reduced lunch status	Free and Reduced Lunch Status
	View/update SSID	View/Update State Student ID
EMIS Demographic	View free/reduced lunch status	Free and Reduced Lunch Status
	View SSID	View/Update State Student ID

Screen	Access	Corresponding Sitemap Permission
EMIS Menu Period G (FY 2014 and earlier)	Extract radio button	Verify/Update and Transfer
EMIS Wizard – Assessment Reporting Collection (A)	View and select Transfer radio button	
EMIS Wizard – Calendar Collection Transfer		
EMIS Wizard – Grad Progress Transfer - Collection (R)		
EMIS Wizard – Staff/Course Transfer - Collection (L)		
EMIS Wizard – Student Transfer - Collection (S)		
Family Groups Wizard	Delete family groups	Delete All Family Groups
Marking Pattern Rules	Select from Mark Type drop-down list	Marks Cutoff Date
	Select from Reporting Term drop-down list	
	Enter Sequence number	
	Select from Significance drop-down list	
Marking Patterns	Add/delete marks	Marks Cutoff Date
Registration Wizard	Access to EMIS tab	Edit Student Profile/SIS Student Search
	Add family group(s) on Family Group tab	Add Students To Family Groups
	View/edit free/reduced lunch status	Free and Reduced Lunch Status
	View/edit SSID	View/Update State Student ID
SIS Student Search (EZ Query)	EMIS fields (Field Selection tab EMIS subtab)	Edit Student Profile/SIS Student Search
	EMIS filters (Filter Criteria tab EMIS subtab)	Edit Student Profile/SIS Student Search
	View free/reduced lunch status	Free and Reduced Lunch Status
	View SSID	View/Update State Student ID
Student Course History Summary	Save school settings and Reset school settings options on the I Want To... menu	Course History Default Settings
View Archived Student Data	View/edit free/reduced lunch status	Free and Reduced Lunch Status
Student Exception Credit	Save exception credit	Marks Cutoff Date
Student Profile Bulk Update	Update free/reduced lunch status	Free and Reduced Lunch Status
Student Requests & Assignments	Assign conflicted section	Assign Course Conflicts
	Assign overfilled section	Overfill Course Sections
Teacher Comment	Save comments	Marks Cutoff Date

Screen	Access	Corresponding Sitemap Permission
View Vendors	Displays vendors	Add User -- As Vendor
Who Needs It	View SSID	View/Update State Student ID

Appendix C: Sitemap Access Details

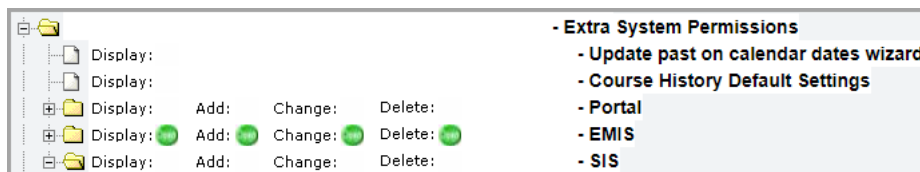
GradeBook Discipline Permissions

To enable access for submitting discipline referrals in GradeBook, you must enable both **Discipline Referral** and **Discipline Referral List** nodes within the main **Teacher Menu** node.

Note: The account must still have a staff member record in order to log in to GradeBook.

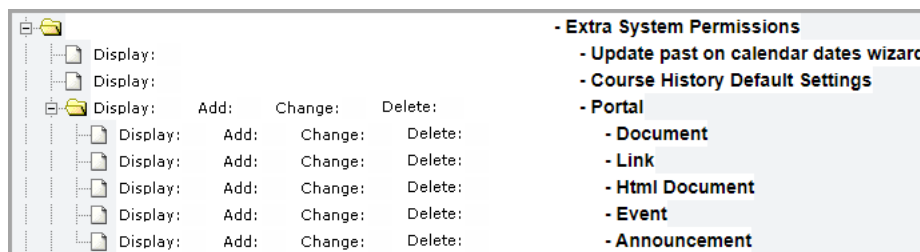
Extra System Permissions

The **Extra System Permissions** nodes let the security administrator set specific permissions for individual actions, rather than screens, for certain elements of StudentInformation.



- **Update past on calendar dates wizard** – Can edit past dates using the Calendar Dates Wizard. Any account with the **Privileged** checkbox deselected that needs to edit past dates using the Calendar Dates Wizard should have this access.
- **Course History Default Settings** – Can configure the default course history summary display settings for the building on the **I Want To...** menu.

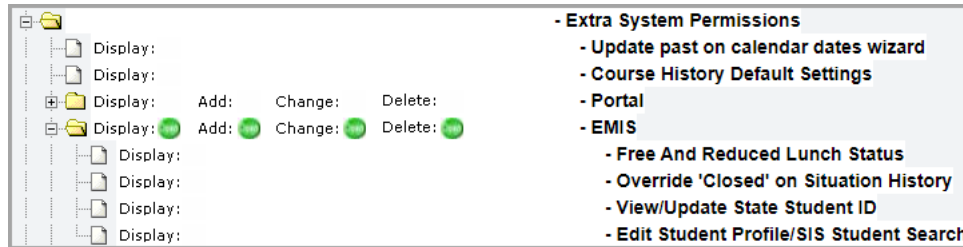
Extra System Permissions – Portal



- **Document** – Can display, add, change, and/or delete items from the **Portal** screen **Documents** section. If you want an account to have access to the **Portal** or **Home** screen, you must assign the account at least **Display** access to the Portal.
- **Link** – Can view, display, change, and/or delete items from the **Portal** screen **Quick Links** section.

- **Html Document** – Can display, add, change, and/or delete items from the **Portal** screen **Headlines!** section.
- **Event** – Can display, add, change, or delete items and/from the **Portal** screen **Upcoming Events** section.
- **Announcement** – Can display, add, change, and/or delete items from the **Portal** screen **Announcements** section.

Extra System Permissions – EMIS



- **Free and Reduced Lunch Status** – Can view and edit the **Free and Reduced/Lunch Status** on the **Edit Student Profile** screen **FD-Attributes** tab. It also lets the account view and edit the **Free/Reduced Lunch Status** on the **Student Profile Bulk Update** screen **FS-Standing & FD-Attributes-Effective Date** tab. It also displays the **Free/Reduced Lunch Status** when using the Student Registration Wizard.

*Note: If you grant a user access to view the **Free/Reduced Lunch Status**, the user can also edit the status. The **Free/Reduced Lunch Status** security options provide all-or-nothing access for the user.*

- **Override “Closed” on Situation History** – Can update EMIS situation history in closed EMIS reporting periods.

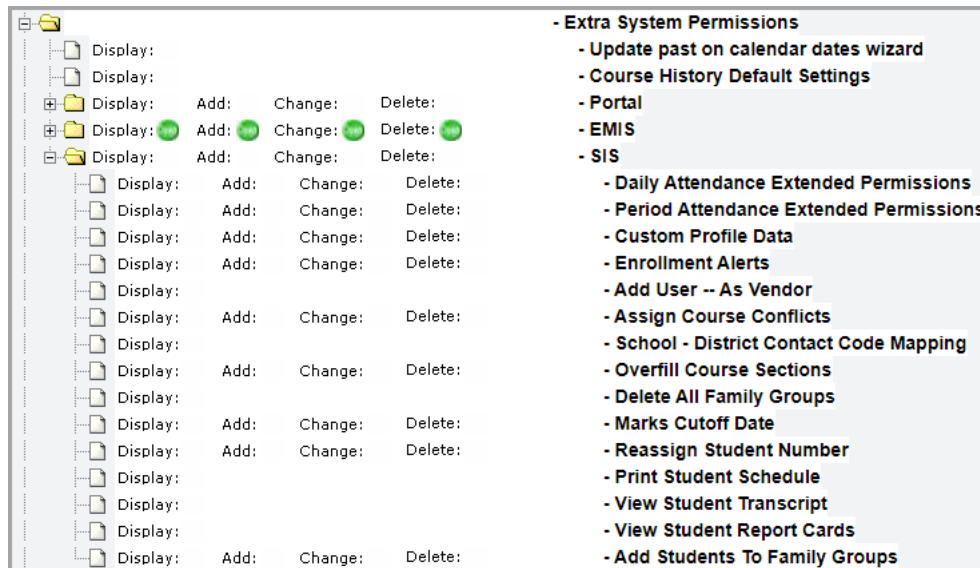
Note: EMIS situation history is only used before FY09 (08-09).

- **View/Update State Student ID** – Can view and/or update the **State Student ID (SSID)** on the **Edit Student Profile** screen **Private** tab (editing the **Private** tab also requires the **Edit Student Profile/SIS Student Search** extra permission). Access must be given to **View/Update State Student ID** to access the state student ID on the following screens:
 - **EZ Query > Reports > SIS Student Search**
 - **EZ Query > EZ Students > Shared Student Data (JVS/Home)**
 - **EZ Query > EZ Students > EMIS Demographic**
 - **EZ Query > Reports > Download Class List**
- **Edit Student Profile/SIS Student Search** – In FY09 and forward, can view and/or update information on the **FS-Standing**, **FS-Absence**, **FD-Attributes**, **FN-Attributes**, or **Private** tabs. In FY08 and earlier, can view and/or update information on the **EMIS 1**, **EMIS 2**, **EMIS 3**, **Preschool**, or **Private** tabs (the **Custom** tab also requires the additional

Custom Profile Data access as described below). The **Edit Student Profile/SIS Student Search** access is also required to access the **Field Selection** tab **EMIS** subtab on the **SIS Student Search** screen.

***Note:** If you grant an account access to view the EMIS tabs on the **Edit Student Profile** screen, the account can also edit the EMIS tabs on the **Edit Student Profile** screen. These security options provide all-or-nothing access for the account.*



Extra System Permissions – SIS



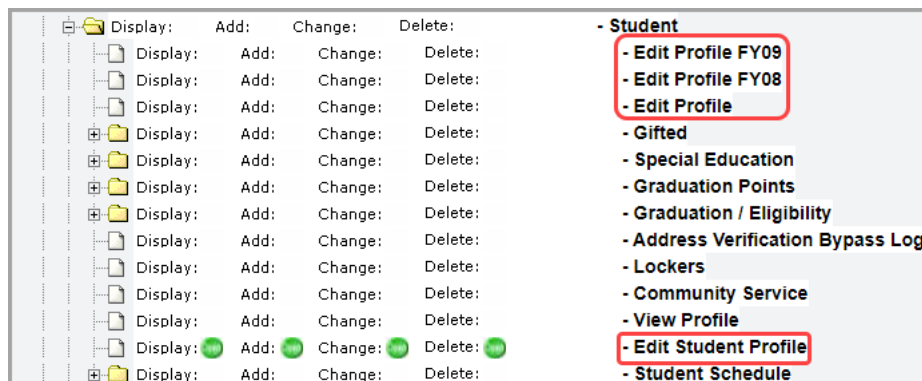
- **Daily Attendance Extended Permissions** – Can display, add, change, and/or delete existing absence records through the **Daily Attendance by Classroom** screen on the **Teacher Menu**.
- **Period Attendance Extended Permissions** – This is not used by StudentInformation and will be removed in a future release.
- **Custom Profile Data** – Can display, add, change, and/or delete information on the **Edit Student Profile** screen **Custom** tab.
- **Enrollment Alerts** – Can display, add, change, and/or delete **Enrollment Alerts** from the **Portal** screen.
- **Add User -- As Vendor** – Can view, edit, and inactivate vendor accounts on the **View Vendors** screen. Can also assign roles to vendors on the **Assign Roles to Accounts** screen.
- **Assign Course Conflicts** – Can assign courses that cause conflicts for a student's schedule.
- **School – District Contact Code Mapping** – Displays the **District Codes** column on the **Contact Type Codes Maintenance** screen.
- **Overfill Course Sections** – Can add assignments that would create an overfill for the course section.
- **Delete All Family Groups** – Displays the **Remove existing groups in the district** checkbox on the **General** tab of the **Family Groups Wizard**.

- **Marks Cutoff Date** – Can view, add, edit, and/or delete exception credits on the **Student Exception Credit** screen and the **Marks Cutoff Date** on the **Reporting Terms Maintenance** screen.
- **Reassign Student Number** – Can reassign the student number on the **Edit Student Profile** screen **General** tab and select or deselect the **Auto-Assign Student Number** checkbox.
- **Print Student Schedule** – Displays this option on the **I Want To...** menu.
- **View Student Transcript** – Displays this option on the **I Want To...** menu.
- **View Student Report Cards** – Displays this option on the **I Want To...** menu.
- **Add Students To Family Groups** – Can set up family groups on the **Registration Wizard** screen **Family Groups** tab.

SIS – Student – Edit Profile Node

The following edit profile nodes display below **SIS – Student: Edit Profile FY09, Edit Profile FY08, Edit Profile**, and **Edit Student Profile**. If you have any roles with specific access on **Edit Profile** (i.e.,  or ), you need to ensure all variations of the edit profile node are updated accordingly.

The **Edit Student Profile** node controls access to all variations of the profile, so if you deny access to the **Edit Student Profile** node, the user cannot access any profile screen. You can set access for all other edit profile nodes separately if needed.



VendorLink Permissions

As of ProgressBook Suite v19.0.0, these permissions should no longer be modified in StudentInformation. The security roles for vendors are now managed separately and synced to ITCs.

DataMap Permissions

The DataMap sitemap nodes cannot be used to create new roles. To see what access the preset roles grant, see [“DataMap Preset Roles.”](#)

Appendix D: Resource Permissions Details

Reports tab

Reporting resource permissions are composed of features that determine what screens a user can access and what actions a user can take within the application. For more information on security for Reporting, refer to "Security" in the *ProgressBook Report Designer Guide*.

All Data Objects – Controls whether the role can access all categories to create or edit reports, even if they do not have access to any particular folder.

Report Folders – Controls whether the role can **View** all folders and their relevant categories for creating custom reports; controls whether the role can **Update** the contents of all report folders (i.e., save custom reports to the folders).

[Folder name] – Controls whether the role can **View** the corresponding report folder (except the reports in the **Admin** subfolder) and its relevant categories for creating custom reports; controls whether the role can **Update** the contents of the corresponding report folder (i.e., save custom reports to the folder) except reports in the **Admin** subfolder.

***Note:** The **District Shared** resource lets users within the district **View** and/or **Update** the contents of the **District Shared** folder. Districts who wish to share reports with specific users without granting them access to everything within a folder can assign this resource.*

[Folder name] (Admin) – Controls whether the role can **View** reports in the corresponding **Admin** subfolder; controls whether the role can **Update** the contents of the corresponding **Admin** subfolder (i.e., save custom reports to the subfolder).

Report Scheduler – Controls whether the role can schedule reports.

Report Types – Controls whether the role can create the following types of reports:

- Advanced Reports
- Chained Reports
- Crosstab Reports
- Express Reports
- Express Views

Notifications tab

Each resource permission for Notifications grants access to the corresponding available notification rule. For more information on notification rules, refer to "Appendix: Job Functions & Rules" in the *StudentInformation Notifications Guide*.

SpecialServices tab

SpecialServices resource permissions are composed of features that determine which screens a user can access and the actions a user can take within the application. These features are categorized as “*Admin*,” “*Case Management*,” “*Documents*,” or “*Student Search*.” For more information on security for SpecialServices, refer to “Set Up Security” in the *ProgressBook SpecialServices Administrator Guide*.

Admin

▼ Admin			
District Banks	Create :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕	Update : <input type="checkbox"/> ✓ <input type="checkbox"/> ✕ Delete : <input type="checkbox"/> ✓ <input type="checkbox"/> ✕
District Configuration	Allow :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕	
Document Import	Allow :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕	

- **District Banks** – Controls the user’s access to the **Student Documents** screen **Banks** and their ability to **Create**, **Update**, and/or **Delete** district bank items on this tab.
- **District Configuration** – Controls the user’s access to the **District Configuration** screen and their ability to enable or disable district settings on this screen.
- **Document Import** – Controls the user’s access to the **Document Import** screen and their ability to import documents for transfer students on this screen.

Case Management

▼ Case Management		Allow :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕
Self Assign Case Manager	Allow :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕	
Self Assign Service Provider	Allow :	<input type="checkbox"/> ✓ <input type="checkbox"/> ✕	

- **Case Management** – Controls the user’s access to the **Case Management** screen.
 - **Self Assign Case Manager (My Students** screen) – Controls the user’s ability to assign themselves as a case manager for a caseload.
 - **Self Assign Service Provider (My Students** screen) – Controls the user’s ability to assign themselves as a service provider for a student.




Documents

▼ Documents									
All Student Access		Allow :		✓ x					
▼ Completed		View :		✓ x		Delete :		✓ x	
504 Plan		View :		✓ x		Delete :		✓ x	
BIP		View :		✓ x		Delete :		✓ x	
ETR		View :		✓ x		Delete :		✓ x	
IEP		View :		✓ x		Delete :		✓ x	
Other		View :		✓ x		Delete :		✓ x	
PR		View :		✓ x		Delete :		✓ x	
SP		View :		✓ x		Delete :		✓ x	
WAP		View :		✓ x		Delete :		✓ x	
WEP		View :		✓ x		Delete :		✓ x	
▼ Open		View :		✓ x		Create :		✓ x	
		Update :		✓ x		Delete :		✓ x	
		Complete :		✓ x					
504 Plan		View :		✓ x		Update :		✓ x	
BIP		View :		✓ x		Update :		✓ x	
ETR		View :		✓ x		Update :		✓ x	
IEP		View :		✓ x		Update :		✓ x	
Other		View :		✓ x		Update :		✓ x	
PR		View :		✓ x		Update :		✓ x	
SP		View :		✓ x		Update :		✓ x	
WAP		View :		✓ x		Update :		✓ x	
WEP		View :		✓ x		Update :		✓ x	

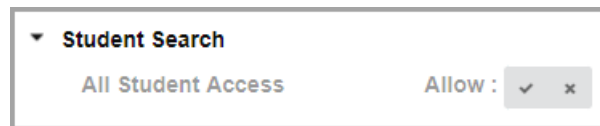
- **All Student Access (Dashboard screen and the Student Documents screen Documents tab)** – Controls whether the user can view all special education documents for all students within the district or documents only for the students assigned to them.
- **Completed (Dashboard screen and the Student Documents screen Documents tab)** – Controls the user’s ability to **View** and/or **Delete** all completed special education documents.
 - **504 Plan; BIP; ETR; IEP; Other; PR; SP; WAP; WEP (Dashboard screen and the Student Documents screen Documents tab)** – Controls the user’s ability to **View** and/or **Delete** each type of completed special education document.
- **Open (Dashboard screen and the Student Documents screen Documents tab)** – Controls the user’s ability to **View, Create, Update, Delete, and/or Complete** all open special education documents.

Note: Users who can complete documents can also send documents to the desired recipients for review via the Frontline Collaboration Portal. For more information on sending documents for review, see the "Sending a Document for Review via the Frontline Collaboration Portal" section of the ProgressBook SpecialServices User Guide.

- **504 Plan; BIP; ETR; IEP; Other; PR; SP; WAP; WEP (Dashboard screen and the Student Documents screen Documents tab)** – Controls the user’s ability to **View** and/or **Update** each type of open special education document.

Note: Users with **Update** permissions for at least one document type can access the Collaboration Portal from SpecialServices. All 4 preset SpecialServices user roles have **Update** permissions for at least one document type. If you want to disable access to the Collaboration Portal, you can create an additional user role and set all **Update** permissions to   or  for that role.

Student Search



- **All Student Access** – Controls whether the user can search for and create documents for any special education student within the district or only for the students assigned to them.

Appendix E: Preset Roles

There are preset roles available for DataMap, Reporting, SpecialServices, and StudentInformation. The roles can be assigned to groups or individual accounts. The following tables explain the access granted for each role.

- [“DataMap Preset Roles”](#) (refer to the *ProgressBook DataMap Administrator Guide* for more information on setting up security for DataMap)
- [“Reporting Preset Roles”](#) (refer to the *ProgressBook Reporting Report Designer Guide* for more information on setting up security for Reporting)
- [“SpecialServices Preset Roles”](#) (refer to the *ProgressBook SpecialServices Administrator Guide* for more information on setting up security for SpecialServices)
- [“StudentInformation Preset Roles”](#)

DataMap Preset Roles	
Roles	Abilities
DataMap - General Access	<ul style="list-style-type: none"> • Access to DataMap • View students based on the job function assigned to the staff member
DataMap - Student Admin	<ul style="list-style-type: none"> • Access to all students in the school, district, or ITC (depending on the level at which the role was assigned) • Access to view more students than the staff member’s job function permits
DataMap - Assessment Admin	<ul style="list-style-type: none"> • Access to the Manage Assessment Scores, Manage District Assessments, and Import Assessment Scores screens in the Admin menu • Access to all assessment management and import functions • Ability to create district assessments • View state student IDs (SSIDs) in any export

DataMap Preset Roles	
Roles	Abilities
DataMap - Teacher Admin	<ul style="list-style-type: none"> • Access to data on the Assessment Comparison screen for all teachers within the school, district, or ITC (depending on the level at which the role was assigned) • Access to view more teachers than the staff member's job function permits
DataMap - Intervention Program Admin	<ul style="list-style-type: none"> • Access to the Manage Intervention Programs, Manage Intervention Templates, and Manage RIMP Codes screens in the Admin menu • Ability to manage intervention programs and templates • Ability to manage RIMP program codes for the district • Ability to change on-track statuses on RIMPs • Ability to reopen and/or edit closed RIMPs
DataMap - Sensitive Data Access	<ul style="list-style-type: none"> • Access to students' economically disadvantaged statuses • Ability to filter searches by economically disadvantaged status
DataMap - Discipline Data Access	<ul style="list-style-type: none"> • Access to previous 2 years of students' disciplinary history relative to the school year in context
DataMap - Student Objective Reviewer	<ul style="list-style-type: none"> • Access to view and review all student objectives with a Status of Proposed within the school, district, or ITC (depending on the level at which the role was assigned)
DataMap - Student Objective Admin	<ul style="list-style-type: none"> • Access to view, review, and delete all student objectives with a Status of Proposed within the school, district, or ITC (depending on the level at which the role was assigned) • Ability to change the status of an objective from Approved or Scored to Revision Required

Reporting Preset Roles	
ITC-Level Role	Abilities
AH-ITC Report Manager	<ul style="list-style-type: none"> • Create and edit all report types • View and modify the contents of all report folders • Schedule and run all ITC- and district-level reports
District-Level Roles	Abilities
AH-Full Admin Report Manager	<ul style="list-style-type: none"> • Create and edit all report types • View and modify the contents of all district-level report folders • Schedule and run all district-level reports
AH-Full Admin Report Writer	<ul style="list-style-type: none"> • Create and edit all report types • View the contents of all district-level report folders • Schedule and run all district-level reports
AH-Full Report Writer	<ul style="list-style-type: none"> • Create and edit all report types • View the contents of all non-admin district-level report folders • Schedule and run all non-admin district-level reports
AH-Full Admin Viewer	<ul style="list-style-type: none"> • View the contents of all district-level report folders • Run all district-level reports
AH-Full Viewer	<ul style="list-style-type: none"> • View the contents of all non-admin district-level report folders • Run all non-admin district level reports
Folder-Specific Roles	Abilities
AH-Scheduler	<ul style="list-style-type: none"> • Create and edit all report types • Schedule reports to which the user has access

Reporting Preset Roles	
AH-Vendor Extracts Admin Viewer	<ul style="list-style-type: none"> • Create and edit all report types • Run all reports within the Vendor Extracts folder
AH-Vendor Extracts Viewer	<ul style="list-style-type: none"> • Create and edit all report types • Run all non-admin reports within the Vendor Extracts folder
AH-[folder name] Admin Viewer	<ul style="list-style-type: none"> • Run all reports within the specified folder name (i.e., Assessment, Attendance, Discipline, Eligibility, EMIS, Fees, Marks, Medical, Scheduling, School, Staff, Student, and Year End)
AH-[folder name] Viewer	<ul style="list-style-type: none"> • Run all non-admin reports within the specified folder name (i.e., Assessment, Attendance, Discipline, District Shared, Eligibility, EMIS, Fees, Marks, Medical, Scheduling, School, Staff, Student, and Year End)

SpecialServices Preset Roles	
Roles	Abilities
Role	Privileges
SpecialServices - Administrator	<ul style="list-style-type: none"> • Can access the Dashboard screen, the Student Documents screen (including the Documents, Banks, and Recycle Bin tabs), the My Students screen, the Case Management screen, the Settings screen (which houses the District Configuration and Document Import screens), and the Collaboration Portal • (Dashboard screen and Student Documents screen Documents tab) Can access all special education documents for all students within the district • Can search for and create documents for any student within the district
SpecialServices - Case Manager	<ul style="list-style-type: none"> • Can access the Dashboard screen, the Student Documents screen (including the Documents and Recycle Bin tabs), the My Students screen, and the Collaboration Portal • (Dashboard screen and the Student Documents screen Documents tab) Can access documents only for the students in their caseload or for whom they provide a service within the district • Can search for and create documents for any student within the district
SpecialServices - Service Provider	<ul style="list-style-type: none"> • Can access the Dashboard screen, the Student Documents screen (including the Documents and Recycle Bin tabs), the My Students screen, and the Collaboration Portal • (Dashboard and Student Documents screen Documents tab) Can access documents only for the students to whom they provide a service within the district • Can search for and create documents for students only to whom they provide a service within the district
SpecialServices - General Education	<ul style="list-style-type: none"> • Can access the Dashboard screen, the Student Documents screen Documents tab, the My Students screen, and the Collaboration Portal • (Dashboard and Student Documents screen Documents tab) has view-only access to IEPs and PRs as well as view/update access to ETRs for students in their class(es) within the district • Can search for students in their class(es) within the district

StudentInformation Preset Roles	
Roles	Abilities
EZQuery - All	<ul style="list-style-type: none"> • Access to all screens on the StudentInformation > EZQuery menu
Portal Administration	<ul style="list-style-type: none"> • View and update access to the home portal information
Portal Viewing	<ul style="list-style-type: none"> • View-only access to the home portal information

StudentInformation Preset Roles	
Roles	Abilities
Security Administration - All	• View and update access to all screens nested under the StudentInformation > Management > Security menu
SISATTEND - Display	• View-only access to all screens nested under the StudentInformation > SIS > Attendance menu
SISATTEND - Update	• View and update access to all screens nested under the StudentInformation > SIS > Attendance menu
SISDEMOGRAPHIC - Display	• View-only access to all screens nested under the StudentInformation > SIS > Demographic menu
SISDEMOGRAPHIC - Update	• View and update access to all screens nested under the StudentInformation > SIS > Demographic menu
SISDISCIPLINE - Display	• View-only access to all screens nested under the StudentInformation > SIS > Discipline menu
SISDISCIPLINE - Update	• View and update access to all screens nested under the StudentInformation > SIS > Discipline menu
SISFEES - Display	• View-only access to all screens nested under the StudentInformation > SIS > Fees menu
SISFEES - Update	• View and update access to all screens nested under the StudentInformation > SIS > Fees menu
SISFULL - Display	• View-only access to all screens nested under the StudentInformation > SIS menu, excluding screens nested under the StudentInformation > SIS > Student > Medical menu
SISFULL - Update	• View and update access to all screens nested under the StudentInformation > SIS menu, excluding screens nested under the StudentInformation > SIS > Student > Medical menu
SISFULL + MEDI - Display	• View-only access to all screens nested under the StudentInformation > SIS menu (including screens nested under the StudentInformation > SIS > Student > Medical menu)
SISFULL + MEDI - Update	• View and update access to all screens nested under the StudentInformation > SIS menu (including screens nested under the StudentInformation > SIS > Student > Medical menu)
SISGRADES - Display	• View-only access to all screens nested under the StudentInformation > SIS > Marks menu
SISGRADES - Update	• View and update access to all screens nested under the StudentInformation > SIS > Marks menu
SISMEDI - Display	• View-only access to all screens nested under the StudentInformation > SIS > Medical menu
SISMEDI - Update	• View and update access to all screens nested under the StudentInformation > SIS > Medical menu
SISSCHEDULING - Display	• View-only access to all screens nested under the StudentInformation > SIS > Scheduling menu
SISSCHEDULING - Update	• View and update access to all screens nested under the StudentInformation > SIS > Scheduling menu

Appendix F: Job Function Access

The following job functions do not grant access for any ProgressBook application. The SIS job functions are included in any relevant staff reports, and the Bus Driver job function may be used in exports to transportation packages.

Note: *The SPM job functions apply only to integrations with Frontline Special Program Management (SPM).*

Job Functions that Do Not Grant Access			
SIS Job Functions	Frontline Special Program Management (SPM) Job Functions		
<ul style="list-style-type: none"> • Media Specialist • EMIS Coordinator • Technology Coordinator • Bus Driver • Attendance Coordinator • Curriculum Coordinator 	<ul style="list-style-type: none"> • Licensed Audiologist • Licensed Professional Counselor • Licensed Psychologist • Licensed School Psychologist • Licensed Independent Social Worker • Licensed Social Worker • Licensed Practical Nurse (LPN) • Licensed Registered Nurse (RN) • Licensed Occupational Therapist 	<ul style="list-style-type: none"> • Licensed Occupational Therapy Assistant • Licensed Physical Therapist • Licensed Physical Therapist Assistant • Licensed Speech-Language Pathologist • Licensed Speech-Language Pathology Aide • Speech Language Clinical Fellow 	<ul style="list-style-type: none"> • Case Manager • Transportation • Special Education Teacher • Special Education Teacher Aide • Special Education Attendant • Job Coach • Transition Specialist • Interpreter • Assistive Technology Specialist • Adapted PE Teacher

To find out more about a specific job function and the access it grants in StudentInformation, GradeBook, and/or DataMap, refer to following:

- [“Curriculum Director Job Function”](#)
- [“Attendance Job Function”](#)
- [“Master Job Function”](#)
- [“School Support Job Function”](#)
- [“School Administrator Job Function”](#)
- [“Teacher Job Function”](#)
- [“Principal Job Function”](#)
- [“Superintendent Job Function”](#)
- [“Secretary Job Function”](#)
- [“Cafeteria Worker Job Function”](#)
- [“Counselor Job Function”](#)
- [“GradeBook - Principal Job Function”](#)

- “GradeBook - Guidance Job Function”

Curriculum Director Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to lesson plans, lesson plan reports, academic standards maintenance, and grading scales • 	

Attendance Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to student daily and period attendance records in the Absence Queue, the attendance export to send records to StudentInformation, attendance reports, homerooms, and period/block codes 	

Master Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to the GradeBook Administrator Home Page for the entire district with edit privileges for all aspects of GradeBook 	

School Support Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to homerooms, classes, students, staff, lunch choices, and lunch count reports in the school buildings to which the user is assigned as well as all principal role functionality and limited ParentAccess administration 	

School Administrator Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to the GradeBook Administrator Home Page for the school buildings to which the user is assigned with edit privileges for named codes, calendars, staff, reporting periods, courses, classes, academic standards, report cards, lunch choices, and lunch count reports 	

Teacher Job Function		
StudentInformation	GradeBook	DataMap
<ul style="list-style-type: none"> • On the Teacher Menu, view information for only their students • Displays in the Teacher dual listbox for applicable reports • Displays in the Teacher drop-down list for applicable screens 	<ul style="list-style-type: none"> • Access to GradeBook’s grade book features and SpecialServices Classic (if it is enabled) for the classes and students to which the user is assigned 	<ul style="list-style-type: none"> • Access to all students who have a course section with that staff member for the school/district and school year • On the Assessment Comparison screen, when a Search Type of Teacher is selected, has access to only their own students’ data

Principal Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to lunch choices; all clerical options that the Attendance and Secretary job functions can access; and eligibility reports, lunch count reports, and student progress reports • Access to view student progress in ParentAccess as well as teacher grade book information, including GradeBook Grid, 5 Day Planner, lesson plan reports, and class progress reports 	<ul style="list-style-type: none"> • Access to all students within the school/district and school year • On the Assessment Comparison screen, when a Search Type of Teacher is selected, also has access to data for all teachers within the school/district

Superintendent Job Function		
StudentInformation	GradeBook	DataMap
<ul style="list-style-type: none"> • Displays on Transcript (R702) and Report Card (R700) (with the proper keyword) 		<ul style="list-style-type: none"> • Access to all students within the school/district and school year • On the Assessment Comparison screen, when a Search Type of Teacher is selected, also has access to data for all teachers within the district

Secretary Job Function		
StudentInformation	GradeBook (Clerk)	DataMap
	<ul style="list-style-type: none"> • Access to all attendance options that the Attendance job function can access as well as report cards • Access to view report card and interim grades by student and ParentAccess user account maintenance and extracts 	

Cafeteria Worker Job Function		
StudentInformation	GradeBook (Cafeteria)	DataMap
	<ul style="list-style-type: none"> • Access to update lunch choices and lunch count reports 	

Counselor Job Function		
StudentInformation	GradeBook (Guidance)	DataMap
<ul style="list-style-type: none"> • Grants access to the Counselor Maintenance screen and Counselor Comments screen • Displays in the Counselor dual listbox for applicable reports • Displays in the Counselor drop-down list for applicable screens 	<ul style="list-style-type: none"> • Access to student progress reports and viewing student progress in ParentAccess 	<ul style="list-style-type: none"> • Access to all students for whom the staff member is a counselor within the school/district and school year

GradeBook - Principal Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to lunch choices; all clerical options that the Attendance and Secretary job functions can access; and eligibility reports, lunch count reports, and student progress reports • View student progress in ParentAccess as well as teacher grade book information, including GradeBook Grid, 5 Day Planner, lesson plan reports, and class progress reports 	

GradeBook - Guidance Job Function		
StudentInformation	GradeBook	DataMap
	<ul style="list-style-type: none"> • Access to student progress reports and viewing student progress in ParentAccess 	