




*Only users with appropriate security access in StudentInformation can assign roles.  
All roles are assigned in StudentInformation.*

## Assigning a Role to an Individual Account

Navigation: StudentInformation > Management > Security > View Accounts

- 1 On the StudentInformation **View Accounts** screen, enter information in any of the search fields to find the account that you want to assign a SpecialServices role.
- 2 Click **Search**.
- 3 In the results grid that displays, in the row of the appropriate account, click .

### View Accounts

Last Name:  First Name:   
 Email Address:   
 Username:  Domain:   
 Administrative School:  Default School:   
 Active:

1 2 3

1 2

3

	Domain	Username	First Name	Last Name ▲	Email	Administrative School	Default School	Account Type	Active
<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px;">3</span>	Example Domain	Teacher116	Keith	Gibson	Teacher116@email.edu	Example High School	Example High School	ProgressBook	<span style="color: green;">●</span>

The user record screen **Account** tab displays.

- 4 At the bottom of the screen, on the **Roles** subtab, in the **School** drop-down list, select the district or school to which the role grants access.

**Note:** The 4 preset SpecialServices roles do not offer building-level security. For information on granting building-level security to accounts, see the *Configuring Building-Level Security instructional sheet*.

- 5 In the **Role** drop-down list, select the desired SpecialServices role. (For a complete list of preset SpecialServices roles, see the *SpecialServices Roles instructional sheet*.)

- 6 Click **Add Role**.

Roles
Groups
Impersonations
Reset Password

4


School

5

Role

6 Add Role

The role now displays in the grid and is assigned to the account.

**Note:** To remove a role from an account, in the row of the role you want to remove, click .

*\*see reverse side for more information*

## Assigning a Role to Multiple Accounts

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

- 1 On the StudentInformation **Assign Role to Accounts** screen, in the **School** drop-down list, select the district or school to which the role grants access.

**Note:** The 4 preset SpecialServices roles do not offer building-level security. For information on granting building-level security privileges to accounts, see the *Configuring Building-Level Security instructional sheet*.

- 2 In the **Role** drop-down list, select the desired SpecialServices role. (For a complete list of preset SpecialServices roles, see the *SpecialServices Roles instructional sheet*.)

- 3 Click **Search**.

**Note:** You can search for specific accounts by entering account information in the search fields. Use \* as a wildcard before, after, or in between keywords to narrow your search results. This search is not case sensitive.

**Assign Role To Accounts**

1 School: \* Example District

2 Role: \* SpecialServices - Case Manager

Last Name:  First Name:

Email Address:

Username:  Domain:

Administrative School: All Schools Default School:

3 Search

In the dual listbox that displays, a list of available accounts displays in the **Available** listbox, and a list of accounts that have already been assigned the selected role displays in the **Assigned** listbox.

- 4 In the **Available** listbox, select the accounts that you want to assign the selected role, and then click → to move them to the **Assigned** listbox. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move accounts between the 2 listboxes.)

- 5 Click **Save Assigned Accounts**.

4 Available Assigned Accounts Assigned Role at a Higher Level

Domain	Username
Training	master1

5 Save Assigned Accounts

The dual listbox closes, the role is assigned to the selected accounts, and a success message displays.