



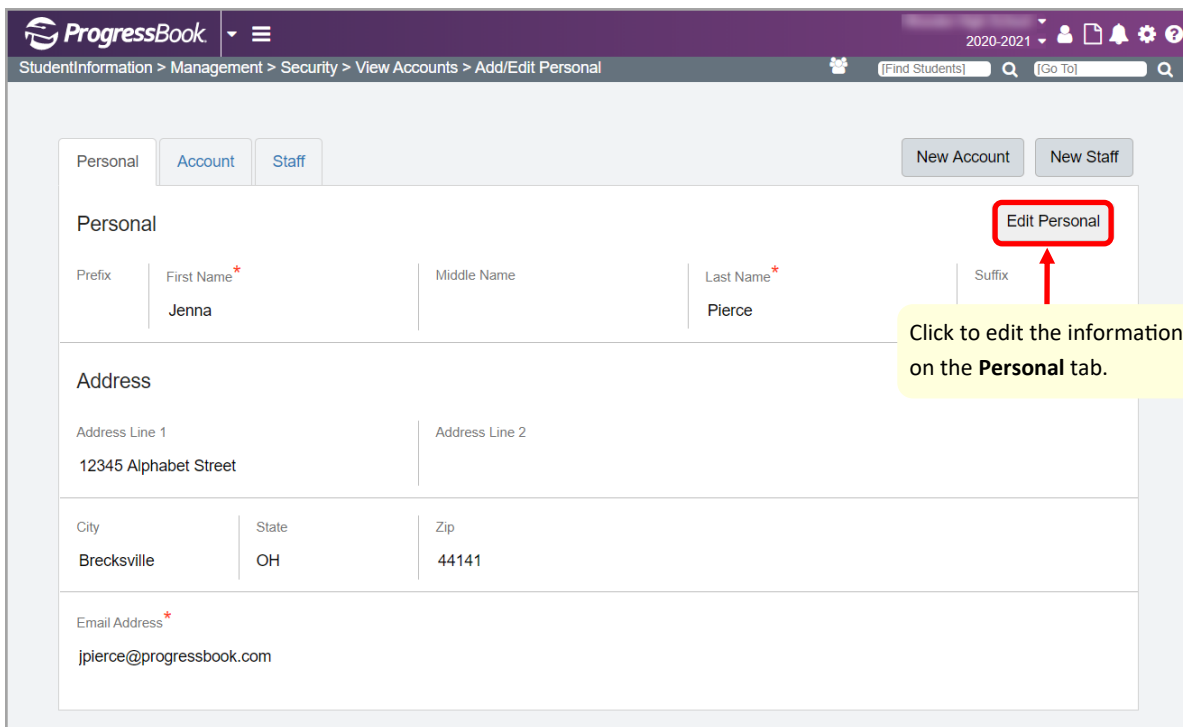
Configuring User Records

The user record screen houses 3 tabs you can use to view or edit information related to a user: the **Personal** tab, the [Account tab](#), and the [Staff tab](#). You can locate the user record screen by searching for or adding an account or staff member in StudentInformation. The overall process for setting up a new user record is outlined below, but once the user's information has been added to the system, these tabs can be edited at any time.

1. Create a new account and enter all necessary account information.
2. Save the newly created staff record on the [Staff tab](#), and then add job functions as necessary.
3. On the [Account tab](#), add roles, groups, and impersonations as necessary.

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, the corresponding fields on the **Staff** tab do not update to match so that you can maintain these records separately.



For more information about any of the information on this instructional sheet, see the ProgressBook StudentInformation Security Guide.



Account Tab

On the user record screen **Account** tab, you can view and/or edit information related to the user's account. On this tab, you can also add roles, groups, and impersonations. You can also reset the account's password.

Select this checkbox to mark the staff member as active. Users cannot log in if they are inactive.

Select the school that should have the ability to edit this account.

Select this checkbox to grant privileged access (see the *ProgressBook Student Information Security Guide* for more information).

Select the school that should be the working school when the user logs in to their account.

Subtab	Procedure
Roles	In the drop-down lists, select the appropriate School and Role(s) for the account. Click Add Role .
Groups	In the drop-down lists, select the appropriate School and Group for the account. Click Add Group .
Impersonations	In the Staff Member drop-down list, select the staff member in the district whose access you wish to have the user's account impersonate. In the Permissions drop-down list, select one or more of the corresponding permissions the impersonation grants, and then click Add Impersonation : <ul style="list-style-type: none"> • 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.
Reset Password	Enter the same password in the Password and Confirm Password fields, then click Reset .



Staff Tab

A staff member represents a district employee. On the user record screen **Staff** tab, staff members can be assigned job functions for specific school years, which grants them specific access to Student Information, GradeBook, and DataMap. A user can have more than one staff member record associated with a single account if necessary.

Note: When you first create an account, information from the **Personal** tab populates on the **Staff** tab. However, this does not mean a staff member record has been created. You must enter required information and click **Save** on the **Staff** tab to create the associated staff member record and to add job functions.

ProgressBook 2020-2021

StudentInformation > Management > Security > View Accounts > Add/Edit Personal

Personal Account **Staff** New Account New Staff

Staff Edit Staff

First Name: Jenna Middle Name: Last Name: Pierce

Phone Number: Phone number unlisted: Email Address: jpierce@progressbook.com

Staff Code*: 4321 State Staff ID*: BC1234567 State staff ID unavailable

Primary School: Wooster High School Start: 08/03/2020 Stop: 06/30/2020

Comments: Enter a 4-character code that uniquely identifies the staff member.

Active Select this checkbox to mark the staff member as active. Users cannot log in if they are inactive.

School: Select... Year: Select... Job Functions: Select...

Allow staff member to view all students in EZ Query Add School

School	School Year	Job Function	EZ Query	Active	Actions
Wooster High School	2020-2021	Teacher	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Enter the unique state-generated ID for the staff member; this ID can be 999999999 or 2 letters followed by 7 numbers.

Enter a 4-character code that uniquely identifies the staff member.

Select this checkbox to mark the staff member as active. Users cannot log in if they are inactive.

In the drop-down lists, select the **SCHOOL** (or district), **Year**, and **Job Functions** appropriate for the staff member, and click **Add School** to save the record. Add as many records as necessary for the staff member.