

# Configure - Users

## School Tools ©



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
This user guide assumes **School Tools** is fully configured and operating normally and that you are logged in with *ADMIN* privileges. This guide is designed to navigate you through adding and removing employees from the system.

## Adding a New Employee


You will need to collect the following information before adding a new employee to the system:

- **Employee first name and last name.**
- **Employee email address.**
- **Employee password** (at least 8 characters including lower case, upper case, number, and special character).
- **Employee ID.**
- **Campus ID** – To which campus is this employee assigned? Campus ID = 000 if employee isn't assigned to a specific campus.
- **Staff Housing** – Does this employee live in school housing? If so, you will need the housing ID, address, and the amount of the required security deposit.
- **Room/Office Supervisor** – Is this employee considered a supervisor for any room or office?  
*Examples:* A teacher is the supervisor of their classroom(s). Principal is supervisor for principal's office. Maintenance director is supervisor of maintenance office.
- **Special User** – Is this employee a superintendent, principal, business manager, secretary, maintenance director, technology director, transportation director, transportation business manager, duty human resources manager, PO business manager, child nutrition director, child nutrition manager for one or more campuses?
- **Approves Requests** – Does this employee administratively approve any of the following requests for one or more campuses?
  - Absent From Duty Requests
  - Maintenance Requests
  - Purchase Order Requests
  - Technology Requests
  - Transportation Requests

To add this new user to the system...

1. Login to **School Tools** with you administrator account.
2. Select **CONFIGURATION>Users**.
3. Click  to create the user and launch editor with default settings and rights.
4. Use the information you collected previously to complete the form. Certain users may have multiple roles at the campus or district level. Use the “**How To**” guides to help you determine what rights to assign to a user. A list of rights for common school roles is shown below:
  - a. **Business managers**, especially in small districts, should be granted the default settings plus the following rights:
    - isBusinessManager
    - isDutyAdmin
    - isDutyEditor
    - isDutyMonitor
    - isPOBusinessAdmin
    - isPOMonitor
    - isMaintenanceMonitor
    - isTechnologyMonitor
    - isLocalFuelAdmin
    - isLocalFuelMonitor
    - isBusRouteAdmin
    - isBusRouteMonitor
    - isBuildingSuperAdmin
    - isBuildingMonitor
    - isInventorySuperAdmin
    - isInventoryAdminDelete
    - isInventoryMonitor
    - isUtilitySuperAdmin
    - isUtilityAdmin
    - isUtilityMonitor
  - b. **Maintenance directors** should be granted the default settings plus the following rights:
    - isDutySupervisor
    - isMaintenanceAdmin
    - isMaintenanceMonitor
    - isLocalFuelAdmin
    - isLocalFuelMonitor
    - isExemptFromTransportationRequest
    - isBuildingMonitor
    - isInventoryAdminDelete
    - isInventoryMonitor
    - isUtilityMonitor
  - c. **Transportation directors** should be granted the default settings plus the following rights:
    - isDutySupervisor
    - isTransportationAdmin


- isTransportationMonitor
  - isLocalFuelAdmin
  - isLocalFuelMonitor
  - isExemptFromTransportationRequest
- d. **Transportation staff** (not including the transportation director) should be granted the default settings plus the following right:
- isTransportationStaff
- e. **PEIMS coordinators** should be granted the default settings plus the following rights:
- isFitnessGramSuperAdmin
  - isFitnessGramMonitor
- f. **Classroom teachers** should be granted the default settings plus the following rights:
- isLessonPlanCreator
  - isSPEDEditor
- g. **Physical education teachers** should be granted the default settings plus the following right:
- isFitnessGramAdmin
- h. **Bus drivers** should be granted the default settings plus the following right:
- isBusRouteDriver
- i. **Technology directors (not staff)** should be granted the default settings plus the following rights:
- isAdmin
  - isTechnologyAdmin
  - isTechnologyMonitor
  - isBuildingSuperAdmin
  - isBuildingMonitor
  - isInventorySuperAdmin
  - isInventoryMonitor
- j. **School secretaries** should be granted the default settings plus the following rights:
- isDutyMonitor
  - isLessonPlanMonitor
- k. **School principals** should be granted the default settings plus the following rights:
- isDutyMonitor
  - isDutySupervisor
  - isInventorySuperAdmin
  - isInventoryMonitor
  - isLessonPlanAdmin
  - isLessonPlanMonitor
  - isSPEDMonitor
- l. **School superintendents** should be granted the default settings plus the following rights:
- isDutySuperAdmin – if the superintendent approves *Absent From Duty Requests*
  - isDutyAdmin
  - isDutySupervisor
  - isPOSuperAdmin - if the superintendent approves *Purchase Order Requests*
  - isPOMonitor
  - isMaintenanceSuperAdmin - if the superintendent approves *Maintenance Requests*
  - isMaintenanceMonitor

- isTechnologySuperAdmin - if the superintendent approves *Technology Requests*
  - isTechnologyMonitor
  - isTransportationSuperAdmin - if the superintendent approves *Transportation Requests*
  - isTransportationMonitor
  - isLocalFuelMonitor
  - isExemptFromTransportationRequest
  - isBusRouteMonitor
  - isBuildingMonitor
  - isInventoryMonitor
  - isUtilityMonitor
- m. **Special services coordinator** should be granted the default settings plus the following rights:
- isSPEDSuperAdmin
  - isSPEDAdmin
  - isSPEDMonitor
- n. **Inventory scanner/verifier** should be granted the default settings plus the following rights:
- isInventoryVerifier
5. Click **Save Changes** to return to *User Management*.
  6. Click the **School Tools** header to return to the main menu.
  7. If this user is a **Room/Office Supervisor...**
    - a. Select **CONFIGURATION>Buildings and Structures**.
    - b. Click  edit rooms for the building in which the room is located. You will be presented with a list of rooms for that building.
    - c. Edit the desired room and modify the supervisor to reflect the correct employee.
    - d. Click **Save Changes** and the **School Tools** header a few times to get back to the main menu.
  8. If this user is a **Special User...**
    - a. Select **CONFIGURATION>Notifications and Settings**.
    - b. Modify the *email notification* section to reflect special responsibilities for this user for CAMPUS ID = 000. It is common to have a user assigned to multiple special user roles.
    - c. To modify *email notification* for other campuses, click **Define/Edit Campuses** and change the portions of the email notification section to reflect special responsibilities for this user for each of the other campuses. It is common to have a user assigned to multiple special user roles over multiple campuses.
    - d. Be sure to save changes.
  9. Does this user **Approve Requests** for absent from duty, maintenance, purchase orders, technology, or transportation for one or more campuses?
    - a. Select **CONFIGURATION>Notifications and Settings**.
    - b. Modify the *email notification* section to indicate the user as the one who approves a specific type of request for CAMPUS ID = 000.
    - c. To modify *email notification* for other campuses, click **Define/Edit Campuses** and change the portions of the email notification for each of the other campuses as necessary.
    - d. Be sure to save changes.
  10. The user should now be setup to use the **School Tools** system. ***IMPORTANT***: Whenever a user's role changes you must use the steps listed above to modify **School Tools** to reflect those changes.

## Removing an Employee

If a user is no longer part of the district, you will need to set the user status to **INACTIVE**. The user will no longer be able to access the system but all data referencing the user previously will remain intact. You could change the user status back to active should the user return to the district as an employee later and all prior user data will still be available. Users aren't removed, only marked as inactive.

To mark a user as inactive...

1. Login to **School Tools** with you administrator account.
2. Select **CONFIGURATION>Users**.
3. Edit the desired user and uncheck the box next to **isActive**.
4. Save changes and click the headers to return to the main menu.
5. Was this user a **Room/Office Supervisor**...
  - a. Select **CONFIGURATION>Buildings and Structures**.
  - b.  Click **EDIT** edit rooms for the building in which the room is located. You will be presented with a list of rooms for that building.
  - c. Edit the desired room and modify the supervisor to reflect a different employee.
  - d. Click **Save Changes** and the **School Tools** header a few times to get back to the main menu.
6. Was this user a **Special User**...
  - a. Select **CONFIGURATION>Notifications and Settings**.
  - b. Modify the email notification section and change special responsibilities once occupied by this user to a different user for CAMPUS ID = 000.
  - c. To modify email notification for other campuses, click **Define/Edit Campuses** and change special responsibilities once occupied by this user to a different user for each of the other campuses.
  - d. Be sure to save changes.
7. Did this user **Approve Requests** for absent from duty, maintenance, purchase orders, technology, or transportation for one or more campuses?
  - a. Select **CONFIGURATION>Notifications and Settings**.
  - b. Modify the email notification section and change the user to a different user as the one who approves a specific type of request for CAMPUS ID = 000.
  - c. To modify email notification for other campuses, click **Define/Edit Campuses** and change the portions of the email notification for each of the other campuses as necessary modifying the user to a different user.
  - d. Be sure to save changes.
8. The user should now be fully deactivated from the **School Tools** system.