

# INFORMATION MARKETING GROUP (IMG) IMPROVING K-12 EDUCATION THROUGH SOFTWARE

# iPass Security System

Information Marketing Group 250 Franklin Street Framingham, Massachusetts 01720 508-626-8682 www.imgsoftware.com

## Security System Table of Contents

Security System Overview	1
A. Defining User Types/Groups	1
B. Assigning Menu access for each User Types/Groups	
C. Assigning Users to Folders and User Types/Groups	
D. Assigning Users to Extra Security Options	2
Steps to Defining User Types and Assigning Menu Access:	3
Steps to Creating a New User Account	3
Steps to Modifying a User Account	4
<user types=""></user>	4
User Maintenance Filter	5
<manage users=""></manage>	6
Extra Security Options	9
Assign Teacher Access	11
Activity Administrator	12
Password Parameters	13
Change User ID	14
Guardian Approval	15
Guardian Maintenance	

## **Security System Overview**

This module allows you to setup and manage security option for users, setup Activity Administrators, Set district Password Parameters, Change a Username, and Monitor Guardians. Consistent with all *i* PASS modules, there is set of maintenance tables that drive the system and they must be setup and defined by the school and/or school district.

Please be aware that all tab and Menu descriptions in the i PASS environment are customizable and may vary from the tab or menu descriptions displayed in this documentation. Please see your local i PASS super user or contact IMG support for further clarification.

The Security System has 8 menu options:

User Type
Manage Users
Assign Teacher Access
Activity Administrator
Password Parameters
Change User ID
Guardian Approval
Guardian Maintenance

(See Figure 1)



Figure 1

The i **PASS** District Administrator should establish a policy for defining users, groups, and their respective levels of access to the system. Guidelines for establishing User Names and Passwords should also be included in your policy. This information should be highly confidential and never be shared. Users should be responsible for their password and be allowed to change their own password.

#### **Helpful Hint!**

Users should be instructed to Logout of the software whenever they are going to be away from their workstation.

Users should be instructed to protect their User-Id and Password from being compromised and hence used by others.

*i* **PASS** has a "Session Time-Out" feature that can be set on a user-by-user basis. Initial setup required under <Security System> <Manage Users>.

## The Security System is based on:

## A. Defining User Types/Groups

The Security Administrator can define any number of different *User Types/Groups*. Each *User Types/Groups* is then given or denied access to any combination of Pages and/or Tabs.

#### **Example:**

A **User Types/Groups** might be Counselor, who would NOT have access to Add Attendance, or Assign Buses, but could modify a Course and/or print Scheduling Reports.

There is no limit to the number of **User Types/Groups** that the System Administrator can define, nor is there a limit to the number of Users who could be assigned the same **User Types/Groups**, nor is there a limit to the number of User Types/Groups that can be assigned to a single user.

## B. Assigning Menu access for each User Types/Groups

When a User is defined in the system, they are given access to any combination of menu Folders. Each Folder is displayed vertically to the left of the Events Calendar when a User first logs in.

If a User does not have access to a particular Folder, such as "Discipline System", then they will not have access to any pages or tabs attached to that Folder regardless of which *User Types/Groups* the User is assigned to.

Users can be given access to any combination of Schools. Users can be given access to any combination of *User Types/Group*.

## **Example:**

Administrators, Clerks, Counselors, and Teachers etc...

A **User Type/Group** of Parent will only be able to see their children.

A **User Type/Group** of Teacher will only be able to see students that are scheduled into their courses, unless otherwise authorized based on an individual Security option assigned to them.

## C. Assigning Users to Folders and User Types/Groups

A User may be assigned to any combination of Folders. A User may be assigned to any combination of *User Types*.

## D. Assigning Users to Extra Security Options

There are a number of additional security options that can be assigned to an individual User to further increase or restrict their access to specific data, programs, procedures or functions.

## **Steps to Defining User Types and Assigning Menu Access:**

Select <Security System> <User Types>. Enter/define in the empty spaces at the bottom of the page as many *User Types* as necessary to achieve your desired levels of access/security.

Click Submit to save your changes.

Click Assign Menus to select the <Menu Items> within each Folder that you wish to assign to the User Type you are working with. Click-on the check-boxes next to the Menu items to allow access to that Menu Item.

Click Submit to save your changes on this page.

**Click** "Tab Menu View" at the top (right) of the page to get a listing of the Tab options within each Menu Item. Click-on the check-boxes next to the Tab Menu items to allow access to those Tabs. Most <Menu Items> are related to a specific Tab View and these Tabs will already be checked for access.

**Please note:** Every User Type has to have two items checked off in the Tab Menu View in order to log in. Click on the Tab Menu in the upper right hand corner of the screen, and scroll down to Hello folder, check off Events by Day and Events by Month.

Click Submit to save your changes on this page.

## Steps to Creating a New User Account:

Select ADD under <Security System> <Manage Users>

Check to see if the User already exists in the database. It is very important that you do not create a new User, especially a teacher, or a person who already exists in the database.

Change the School (name) field and the Status field to be blank. Enter the Last Name of the User you wish to add and Click Submit. The selection list will include all Persons (administrators, teachers, staff, students, guardians, etc.) already defined to some degree in the database.

If the person you are trying to define access for already exists, then select that person and proceed to the Steps to Modify a User Account.

If the person you are trying to define access for is not listed, go to iStaff Biographical System and Add a new staff member there, including a career record. Once complete, go back to Security System and Search for the new person, setting the school and Active/Inactive filters to BLANK. Click on Search.

While setting up the user account, select the appropriate "menu folders", "schools", "user type(s)", and any extra security options required for the user(s) you are working with.

Click Submit to save your changes

## Steps to Modifying a User Account:

Select <Security System> <Manage Users>

Use the "User Maintenance Filter" to find the desired user account. Click-on the user name to open the user information screen.

Make the necessary changes

Click Submit to save your changes

## <User Types>

This screen allows you to define as many different user types as necessary to achieve your desired levels of access/security. User Types are defined under <Security System> <User Types>. Once you have defined and saved your user types the system will display Assign Menus on the right hand side of the screen.

## **User Types:**

User Types allow you to define as broad or as narrow of a range of access that you wish for each user or group(s) of users.

## **Assign Menus:**

Clicking on Assign Menus will allow you to further define the level of access for the User Type you are working with. Click-on the check-boxes of the "Menu folders" and "Tabs Menus" that you want this User Type to be given access.

## **Example:**

Superintendent, Principals, Attendance Clerk(s), High School Guidance Director, Teachers, School Super User, District Super User, Parents, View Access Only, Registration Clerk, DOE processing, etc.)

#### **Helpful Hint!**

Any single User can be assigned to one or more User Types.

Use the "Check All"/"Clear All" options at the top (left) of the page to facilitate your selection process.

Use the "Print" icon to print a copy of the Folder View and Tab View access that you have defined for each User Type.

User Type: Administrator				
Check All - Clear All		Select View: • Folder View • Tab Menu View		
Assigned?	Menu	HTML File	Tab Menu	
Folder: Activ	Folder: Activity System			
	Activities	actactivityselect.html		
	Activity Configuration	supactivitystatus.html	Activity Configuration	
Folder: Administration				
	End Of Year Procedures	rpscourserollover.html	End Of Year Procedures	
V	School Resources	supgradelevel.html	School Resources	
V	District Resources	supbuildingcode.html	District Resources	
V	Person Maintenance	supjobtype.html	Administration	
Folder: Alerts				
V	Add/Modify Alerts	sysmntalert.html		
V	Alerts Reports	rpsalert.html		

Figure 1

## **User Maintenance Filter**

#### School: <Your Default School>

This is the name of the default school that you have selected or has been assigned to you.

If you are authorized to access more than one (1) school, then you can select a different school from the pull-down list of choices. You may change your default school under <My Data> <Set Default School>.

## **User ID:**

Leave the field blank or enter a single user ID.

#### **Last Name:**

Leave the field blank or enter a User's last name or any part of their last name, or select a letter from the alphabetical list at the bottom of the filtering box.

#### **First Name:**

Leave the field blank or enter a User's first name or any part of their first name.

## **User Type:**

Leave the field blank or select a User Type from the pull-down list of choices.

#### Status: <Active>

Accept the default or select *Inactive* from the pull-down list of choices.

#### Submit:

Click-on to enter your selection criteria and display a listing of the Users who meet your criteria.

#### Clear:

Click-on to remove any defined criteria and re-set the default values, then re-define your criteria and submit again.

#### **Helpful Hint!**

It may be that the User you are looking for is a User whose default school is different from the one selected, or the one that you have access to, or has not yet been assigned to a school. You may need to blank the School (name) and the status field to see if the person already exists in the database.

The **Users Maintenance** list will display in alphabetical order, by the user's last name, the users who meet the defined selection criteria. The listing includes the user's Name, ID, Status and Person Type.

Click-on the link for any of the pieces of data in order to select that user and access their **User Information** page and modify any of the fields.

Click-on ADD at the bottom of the page to add a new User.

## BE CAREFUL NOT TO ADD A NEW USER WHO ALREADY EXISTS IN THE SYSTEM.

## <Manage Users>

This screen allows you to add/modify individual user accounts and control their access to i**PASS**. Use the "User Maintenance Filter" to find and modify existing user accounts. <Security System> <Manage Users>.

#### **Helpful Hint!**

By default an alphabetical list of the first 20 or more active Users in the school selected will appear on the page.

The number of names that are displayed on a page is set under <System Configuration > <Parameter Maintenance >.

Click-on <<Next>> at the bottom of the page to view the next page of users. Proceed using the <<Next>> or <<Pre>revious>> page options to find the User you want to modify or further define your search criteria.

Use any combination of the filtering options to narrow the list of users you wish to modify.

#### User ID:

Enter the User ID for this User, the Password is case sensitive. You may enter them with whatever case configuration that you like, but they must be entered every time using that same case configuration in order to be validated and accepted.

#### **New Password:**

Enter the Password for this New User or enter a New Password if you are changing an existing Password. The Password is case sensitive. You may enter them with whatever case configuration that you like, but they must be entered every time using that same case configuration in order to be validated and accepted.

## **Verify Password:**

Enter the exact same Password that you entered above for verification.

#### Title:

Accept the default Title or select from the pull-down list of choices, which is the first one alphabetically defined under your <Administration><Person Maintenance> <Person Titles> tab.

## **First Name:**

Enter the user's first name (this is a required field).

#### Middle Initial:

Enter the user's middle initial.

#### **Last Name:**

Enter the user's last name (this is a required field).

#### Gender:

Select the Gender of the User from the pull-down list or leave the field blank.

#### Email:

Enter the E-Mail address of the User. In some cases, depending on how your mail-server is set-up, this address is the default address used for sending reports that are submitted.

## Workplace:

Enter the workplace of the User, or leave the field blank.

#### Menu Folders:

Select one (1) or more Menu Folders that you want the User to have the ability to access.

#### **Helpful Hint!**

A User must be given access to a Folder in order to have access to any Menu Items (tabs or pages) within that Folder. Access to a Folder does not insure access to any Menu Items (tabs or pages) within the Folder.

All Users should be given access to the <My Data> folder so that they can change their password. Access to the <Logout> folder is automatic.

#### Schools:

Select one (1) or more Schools that you want the User to have the ability to access. The User will have the same access to any other schools that they have as their primary or default school. You must select at least one (1) school.

#### **Helpful Hint!**

Even if you are a single school District, your school must be selected/highlighted here in order to provide access.

## **User Type:**

Select one (1) or more User Types that you want the User to have the ability to access. The User Type defines the access to Menu Items and Tabs within Menu Items, however, they must have been given access to the Folder using the option above. You must select at least one (1) User Type.

## Session Timeout: <System Default>

Select the default Session Timeout or select a different Session Timeout from the pull-down list of choices. **Note:** There is a system parameter setting that must be enabled under <System Configuration> <Parameter Maintenance> <Application Group> select "Team" <Parameter Group> select "System".

#### **Helpful Hint!**

The "Session Timeout" parameter should be set to "Yes" and the "Session Timeout Minutes" field allows you to define the system default setting. The <System Default> time-out is initially set at 15 minutes. This can be modified to any number of minutes. Keep in mind that if you change the number of minutes for the <System Default>, then it will change for ALL Users who have not been assigned a specific timeout number of minutes.

#### Active ID: <Yes>

Select the default status of *Yes* or select *No* from the pull-down list of choices.

## **Extra Security Options**

These are additional security options that can be controlled for each *User*. Check each box that you wish to enable for each *User*.

#### Can overload classes:

Allows the User to add the student to a course, even if the course is full and ignore the maximum seat count in the Course Catalog.

## Can enter period attendance from daily attendance:

Allows the User the option to both Period and Daily Attendance for any student.

#### Can submit student scheduler from schedule screen:

Allows the User to re-schedule a student with all the processing (prioritizing, balancing, linking, etc.) of the full student scheduler.

## Can enter grades for closed terms:

Allows the User to enter/modify a student's grade regardless of whether the Grade Heading has been opened for Teacher access, using <Add/Modify Student Grades>. This option does not apply to <Add/Modify Course Grades>.

## Can create course conflicts from schedule screen:

Allows the User to schedule students with meeting time conflicts.

## Can clear previous student schedules:

Allows the User, in combination with running the Scheduler, to have section assignments of all "Unlocked" scheduled courses ignored. All "Unlocked" courses will be potentially juggled and re-scheduled for the student.

## **Can delete student records:**

Allows the User to delete a student's record.

#### Can update prior year grade:

Allows the User to add/modify/delete a student's grades for prior Academic Years.

## Can input daily attendance for all homerooms:

Allows the User to enter daily attendance for any or all homerooms.

## **Can Update All Competency Groups:**

Allows the User to add/modify/delete any competencies for any group.

## Can Edit ANY student on Find Page:

Allows the User to click-on the ID# of any student they find and have the ability to modify the student's record on any of the <Add/Modify Student Biographical> tabs to which they have been given access.

## **Teacher Can View ANY Student in View Only:**

Allows the Teacher/User to View Only access to any student in their school(s). If this option is not checked, then a Teacher may only view information for students who are scheduled with that student in courses, study halls, or Homerooms.

## Can View ANY Student on Find Page:

Allows the User to see a listing of ALL students in the database regardless of their Primary School. If this option is not checked, then the User will only be allowed to see list of students in their assigned school(s).

## **Can View Locker Combinations:**

Allows the User to see Locker Combinations of students on the <View Only Access> or <Biographical System > <Add/Modify Student Biographical> <Confidential>.

#### **Attendance Clerk**

Allows access to automatically update Period Attendance based on their entry of Daily Attendance.

#### Can Delete Success Plan

Allows the User to delete the Success Plan of any student.



Figure 2

## **Assign Teacher Access**

This option allows you to assign yourself or a substitute for a Teacher to have access to enter that Teacher's Attendance and/or Competency Grades and/or Grades. A substitute for Teacher entry can be a Clerk, a House Secretary, a Teaching-Assistant, a Substitute Teacher or any combination. A Substitute Teacher would need to be entered as a User and then defined as to which Teacher(s) they may enter attendance, competencies or grades for. This designation for a Substitute Teacher could be changed as the person came in to substitute for different Teachers at different times, or this access could be reserved for use only when a Substitute Teacher was in for an extended period of time.

Use the "Search Criteria" to find the Substitute or other person that you wish to have entry access to one (1) or more Teachers' attendance, competencies or grades.

Click-on the link for the type of data you wish the Substitute to enter (Attendance, Competency or Grades).

From the list of teachers, click on the check box to indicate which teacher or teachers this person is to be a substitute for.

#### **Helpful Hint!**

A Data Processing Clerk would probably be defined to have access to enter both Attendance and Grades for ALL Teachers.

Any single User can be assigned to be a substitute for one (1) or more teachers.

Use the "Check All"/"Clear All" options at the top (left) of the page to facilitate your selection process.

A teacher may be a substitute for one (1) or more teachers in a Team Teaching or Vocational Shop situation.



Users List				
Name	User ID	Attendance	Competency	Grades
Account, Support	img9408	<u>Attendance</u>	Competency	Grades
Aloisio, James	james	<u>Attendance</u>	Competency	<u>Grades</u>
Brown, Deanna	Deanna	<u>Attendance</u>	Competency	<u>Grades</u>
Carthon, Ran	jamie	<u>Attendance</u>	Competency	<u>Grades</u>
Ciaramitaro, Paul	paola	<u>Attendance</u>	Competency	<u>Grades</u>
Cranford, Dennis	dcranford	Attendance	Competency	Grades

Figure 3

## **Activity Administrator**

The Activity Administrator menu option allows you the ability to assign a person to be the administrator to an activity. To set up activities go to <Activity System><Activities>.

Click on the person's name



Activities Access			
Name	User ID	Activities	
Account, Support	<u>imq9408</u>		
Aiello, Nancy	<u>iteacher</u>		
Cotton, Steve	scotton .		
Cranford, Dennis	<u>dcranford</u>	Football - Varsity Grades 10-12	
Dennis, Teacher	tdennis		
Emmons, Mike	memmons		
Franklin, Jeremy	<u>jeremy</u>		
Griffin, James	iariffin		

Figure 4

Click on the box next to the activity you want to assign to place a check mark in it.

Click the Submit button.



Figure 5

## **Password Parameters**

The Password Parameters menu option allows you the ability to set district wide parameters for user passwords.

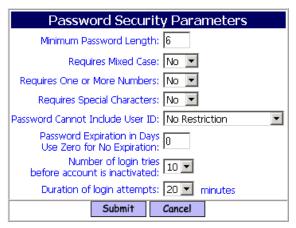


Figure 6

## **Minimum Password Length**

Select the number of characters.

## **Requires Mixed Case**

Set to Yes to force users to use upper and lower case letters within their password.

## **Requires One or More Numbers**

Set to Yes to force users to use numbers in their passwords.

## **Requires Special Characters**

Set to Yes to force users to use special characters such as  $\#@!\%^{*}()$  within their password.

## Password cannot include ID (username)

Set to cannot include user ID or No Restriction.

## **Password Expiration in Days**

Select the number of days. Use zero for No Expiration.

## Number of Login tries before account is inactivated

Select a number to indicate the number of tries each user has to login correctly before their account is deactivated.

## **Duration of Login Attempts**

Select the number of Minutes each user has to login correctly before their account is deactivated.

Click the Submit button.

## **Change User ID**

The Change User ID menu option allows you the ability to change a users ID (Username). This would be needed in case of a name change, or to correct a mistake in an original or duplicate entry.



Figure 7

## **Existing ID**

Enter to current user ID

#### **New User ID**

Enter The new user ID

#### To

Enter the email address of who you would like the report to be emailed to.

## CC List

Enter the email address(s) of who you would like to CC a copy of the report to. Use a comma to separate each email address.

## **Priority**

Select low, medium, high and urgent to indicate the importance the report processor should process this request.

## **Guardian Approval**

The Guardian Approval menu option allows you the ability to Approve or Disapprove Parent applications to receive access to the iParent system.

Click on the applicant's name.



Figure 8

This screen is used to Approve, Deny, Delete and mark as Pending any Parent Applications that have been submitted. The RED indicates where there is a discrepancy between the data in the Database and the date entered by the parent at time of registration.



Figure 9

The student information will be displayed as well as any Guardians in the database that match the information.

Click the radio button next to the guardian.

Click Clear to clear a radio button.

Click Approve to approve the application.

Click Deny to deny the application.

Click Pending to mark the application as pending.

Click Delete to delete the application.

The bottom part of the screen allows you to Create a new Guardian record for the parent if does not already exists.



Figure 10

Click Search to lookup the Guardian if no accurate match was displayed above.

Click on the radio button "Create a New Guardian" to create a new guardian record for this Guardian if one does not exists.

Add any comments you wish to the comment box.

Click Clear to clear a radio button.

Click Approve to approve the application.

Click Deny to deny the application.

Click Pending to mark the application as pending.

Click Delete to delete the application.

## **Guardian Maintenance**

This menu option allows you the ability to manage all Guardian Records.



Guardian List			
Person ID	Title	Name	Primary Student
<u>3074</u>	Mr.	<u>Adams, Ann</u>	Jennifer Adams
<u>11068</u>	Mr.	<u>Adams, Bill</u>	Hannah Adams
<u>482</u>		<u>Adams, David</u>	
<u>6901</u>		<u>Adams, David</u>	William Adams
<u>18831</u>		<u>Adams, Jen</u>	
<u>3567</u>		Adams, Jennifer	William Adams
<u>3073</u>	Mr.	<u>Adams, John</u>	Jennifer Adams
<u>7030</u>		Adams, Nancy	William Adams
<u>7229</u>		Adams, Nancy	
<u>2753</u>		Adams, Tammy	Jennifer Adams
<u>7184</u>	Mrs.	Adams, Tammy	Hannah Adams
11065		Adams, Tammy	
<u>27248</u>	Mr.	Adams, William	Jennifer Adams
<< Prev Next >>			
		ADD	

Figure 11

Enter the Last Name of the Guardian you would like to search for.

#### Click on Search

Click on the name or ID number of the Guardian you wish to view.

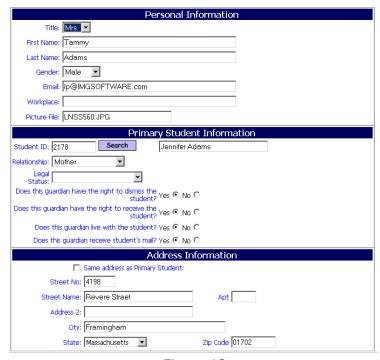


Figure 12

Enter the information for the Guardian

Click the Search button to locate the student you wish to associate this  $\ensuremath{\mathsf{Guardian}}$  to.

Click the Submit button.