samegoal

Administrative Guide

Learn the basics of SameGoal administration. Most actions below may be completed only by a user with an administrative account.

- Admin Training Video

Users

- Add user accounts
- Manage user accounts
- Delete/undelete user accounts

User roles

- What are user roles
- Manage user roles
- Delete/undelete user roles
- Assign user roles/building permissions
- Gen Ed Staff Access

Students

- Students
- Add students
- Update students
- Delete/undelete students
- Collapse student records

Buildings, grade levels, and student teams

- Buildings
- Manage buildings
- Delete/undelete buildings
- Grade level
- Manage grade level
- Student team
- Manage student teams

Forms and documents

- Form settings
- Delete/undelete forms
- Field Settings
- Mark documents incomplete (for correction)
- Undelete documents
- District-to-District transfer
- Permanently purge student document(s)
- Translation

Reports

- Running reports
- Report settings
- Navigating reports
- Troubleshooting and FAQs

Misc. settings

- Building Calendars
- Bulk loader
- Data loader
- District banks
- District information
- Student Information System integration
- Administrative options
    - Document validation
    - Electronic signatures
    - Draft watermark
    - District-to-district transfer
    - Translation options
    - Multi-factor authentication
- Technical settings
    - User authentication
    - Linked accounts reauthentication interval