

User Accounts

Populate a user account spreadsheet for bulk upload. While user accounts may be added in the web interface, bulk loading via spreadsheet during implementation saves time.

Tip You may add an unlimited number of users.

- Add user accounts for all program staff members who will author or manage documentation.
- Add user accounts for general education staff who may need to sign documents electronically during remotely held meetings or contribute to progress reports.
- Admin users have full program access (eg can manage users, students, district banks and technical settings, etc). Assign sparingly.

Steps *To bulk create users:*

1. Download and open bulk-load-users.xlsx.
2. **Buildings tab.** Enter each building in your district.
 - **Building Name.** Each building name should exactly match the building name in your student information system.
 - **Building Code.** A 3-4 character building abbreviation used in the **Users tab**.
3. **Users tab.** Enter each user account to be created.
 - **Last Name.** User last name.
 - **First Name.** User first name.
 - **Email.** User's district email address. If they do not have an email within the district (eg they are a related service provider employed by an outside agency), enter their best work email address.
 - **LDAP Username (leave blank if your district does not use LDAP).** The user's LDAP username is only required when:
 - LDAP/Active Directory is enabled for the environment, and
 - The user is in LDAP, and

- The LDAP username is different than the user's email username (eg LDAP username is "bobsmith", and email username is "bsmith")
- **Force Local Authentication (leave blank if your district does not use LDAP).**
Enter "Yes" when:
 - LDAP/Active Directory is enabled for the environment, but
 - The user is not in LDAP and/or should be authenticated without querying the LDAP/Active Directory server (eg instead use a password stored in SameGoal). This is common for related service providers contracted from outside agencies.
- **Buildings.** A comma-separated list of **Building Code(s)** that represent the buildings each user should be able to access students in. Leave blank for admin users (as those can access all buildings).
- **Role.** User's primary role. Enter the closest match from valid options below:
 - **Special Education Teacher** - Use for Special Education teachers and intervention specialists. Allows users to create and own all IEP-related forms, as well as edit documents they are added to.
 - **Related Service Provider** - Use for Special Education related service providers. Allows users to create and own progress monitoring documents, as well as edit documents they are added to (eg IEPs).
 - **School Psychologist** - Use for school psychologists responsible for Special Education evaluations. Allows users to create and own evaluation documents, as well as edit documents they are added to.
 - **504 Coordinator** - Use for 504 coordinators who are not administrators (eg building 504 coordinators). Allows users to create and own 504 documents, as well as edit any document they are added to.
 - **Gifted Intervention Specialist** - Use for Gifted Intervention Specialists. Allows users to create and own gifted education documents, as well as edit any document they are added to.
 - **Literacy Teacher** - Use for staff responsible for reading improvement and literacy plans. Allows users to create and own K-4 literacy documents, as well as edit any document they are added to.
 - **General Education Teacher** - Use for general education teachers. These users will not be able to create or own documents, but can edit documents they are given edit access to.
 - **Principal/Guidance** - Use for principals and guidance counselors. Allows users to view documents district-wide by default, as well as edit any document they are given edit access to.
 - **View Admin** - Use for anyone who needs to view documents district-wide. These users cannot edit documents.

- **Partial Admin** - Use for anyone who needs the ability to fully manage (have **Is Owner** privileges) on documents district-wide by default.
- **Admin** - Use for administrators. Allows users to manage documents district-wide, manage users, run reports and configure district-wide settings.

Return this spreadsheet to your SameGoal representative or local partner assisting your district's onboarding.