Parent/Contact Portal

Creating Parent/Contact User Accounts

November 12, 2014

FUJITSU

Version History

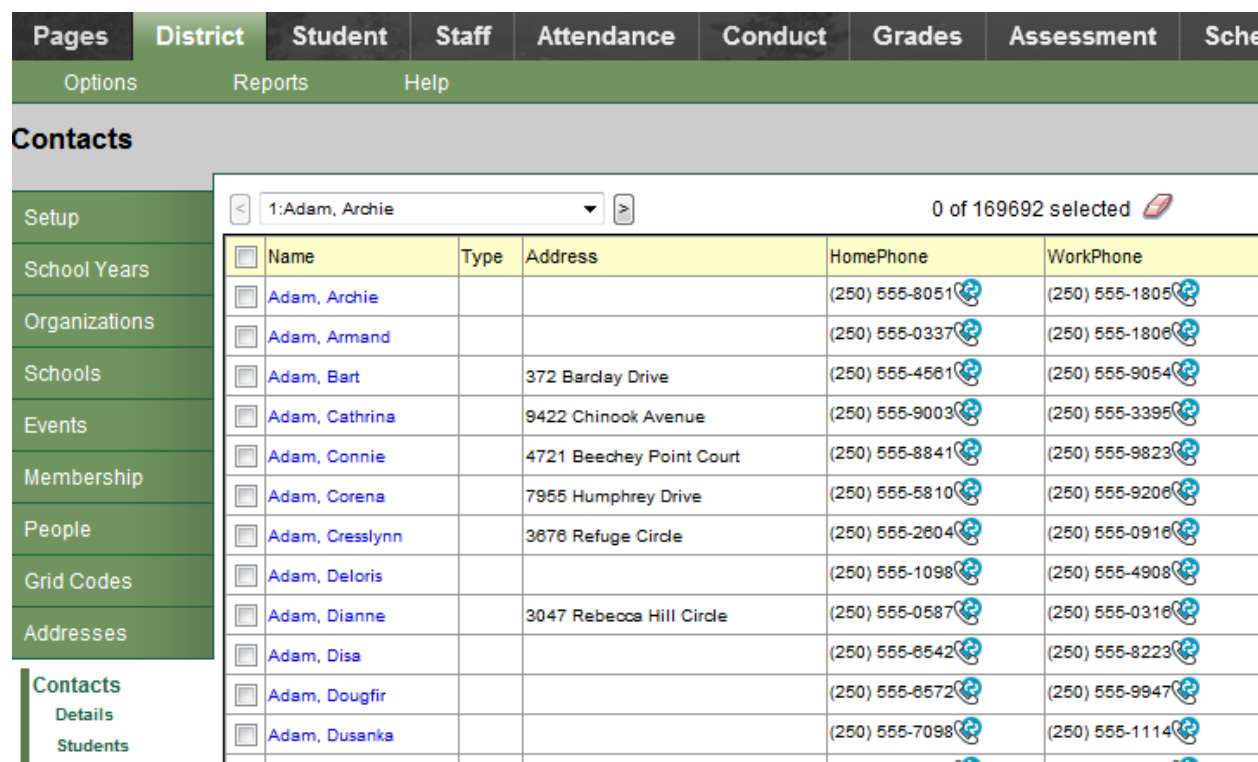| Version	Date	Description
1.0	October 29, 2014	Initial document
	November 12, 2014	Revisions made from review process; posted

Confidentiality

Table of Contents

Purpose

This document introduces the process for creating User Accounts for those Student Contacts in MyEducation BC who will be using the Parent/Contact Portal. Creating User Accounts for Staff and Students is a fairly straight forward task, as there are Staff and Student top tabs from which the "Create User Accounts" wizard can be accessed.

With Student Contacts, on the other hand, there is no top tab that isolates these people in a simple list, so another method must be used. A procedure, called "Create Parent User Accounts" offers additional features that the basic Create User Accounts wizard does not include. Its use is detailed in this document.

1.0 Creating Contact User Accounts from the District View

To view a list of all people who have been entered as Student Contacts, click the District top tab and then the Contacts side tab. Viewing and cleaning up contact data is the first step in the process for creating User Accounts for contacts.

1.1 District top tab > Contacts side tab

As you can see from the illustration above, there are quite a few contacts listed at this District. Only a subset of the contacts displayed should have access to the MyEducation BC information for their associated student. This is where the Create Parent User Accounts procedure's three rules come into play.

1.1.1 FIRST RULE

The contact MUST have the "*has portal access*" box checked. On the **By Student** sub-side tab on the Student Contacts screen, you can open each individual contact record and click the checkbox. You can also edit all appropriate contacts from the **Contacts** side tab list using **Modify List** on the **Options** menu:

When Modify List is selected, any column that is list-editable will have a pencil icon indicating that data in that column can be changed. IMPORTANT NOTE: Once you have made changes, you MUST click the green checkmark at the top, or they will not be saved.

1.1.2 SECOND RULE

The procedure will not impact an existing User Account. If your Parent/Contact already has a user account created (for example, a teacher whose child is also in MyEducation BC – not necessarily in their own district/school), the procedure will not create a new User Account for that person, nor will it modify or overwrite the existing User Account. If a User is a contact of a student at another school, and you have checked the "*has portal access*" checkbox on their student at your school, they will already have access to that student as soon as you check that box and save the record.

On the **Contacts** side tab, in the User column, Y/N indicates whether or not each contact has an existing User Account. You cannot change data here; it is for informational purposes only.

	Name	Type	Address	HomePhone	WorkPhone	Email1	User
School Years							
Organizations	Adam, Alicia			(250) 555-7567	(250) 555-2396	Alicia.Adam@someplace.com	N
	Adam, Alissa		263 Seacloud Circle	(250) 555-8541	(250) 555-4545	Alissa.Adam@someplace.com	N
Schools	Adam, Ally		4088 Skiff Circle	(250) 555-4245	(250) 555-4891	Ally.Adam@someplace.com	N
Events	Adam, Alvin		2172 Olympic Circle	(250) 555-4984	(250) 555-8057	Alvin.Adam@someplace.com	N
	Adam, Archie			(250) 555-8051	(250) 555-1805	Archie.Adam@someplace.com	N
Membership	Adam, Armand			(250) 555-0337	(250) 555-1806	Armand.Adam@someplace.com	N
People	Adam, Bart		372 Barclay Drive	(250) 555-4561	(250) 555-9054	Bart.Adam@someplace.com	N
Grid Codes	Adam, Carolin		6162 Knik Avenue	(250) 555-6457	(250) 555-7844	Carolin.Adam@someplace.com	N
	Adam, Cathrina		9422 Chinook Avenue	(250) 555-9003	(250) 555-3395	Cathrina.Adam@someplace.com	N
Addresses	Adam, Clifford		1626 South Airpark Drive	(250) 555-9006	(250) 555-1923	Clifford.Adam@someplace.com	N
Contacts Details	Adam, Connie		4721 Beechey Point Court	(250) 555-8841	(250) 555-9823	Connie.Adam@someplace.com	N
Students	Adam, Corena		7955 Humphrey Drive	(250) 555-5810	(250) 555-9206	Corena.Adam@someplace.com	N
	Adam, Crosslynn		3678 Refuge Circle	(250) 555-2604	(250) 555-0918	Crosslynn.Adam@someplace.com	N

1.1.3 THIRD RULE

All contacts must have a valid Email address entered. One of the features of the procedure is that it will email each contact individually once their account is created to let them know that it exists and to provide them their login name and password. If there is no email address, no email will be sent and you will need to use another method of communicating their account details. The email format, illustrated below, is set at the Enterprise level, and cannot be edited or changed by a District or School user.

Welcome to the Southeast Kootenay Parent Portal   ↑ ↓ ✕

Welcome to the Southeast Kootenay MyEducation BC PARENT PORTAL which will allow access to see grades, attendance and other information on your child(ren). Each parent or guardian will have their own separate account.

To Access the MyEducation BC System

1. Visit www.myeducation.gov.bc.ca/aspen

2. Make sure popups are enabled for your browser

3. Your user name will be: jbreeze

4. Your temporary password will be: AGAR508lent

NOTE: Both user name and password are case sensitive

5. Enter your user name and password then click Log On to access the system. You will be prompted to fill out some information to change your password so that in the future you can click "I forgot my password" to receive a new password.

Once inside the MyEducation BC system you can navigate around to view information for your student(s).

1.2   Preparing to create User Accounts

When you are ready to create accounts for Contacts at your school, it is best practice to search first for any Contacts on the list who does have an existing User Account, who may have the '*has portal access'* box checked, but does not have any information in the Email field. There is a filter on this screen called "Needs email address":
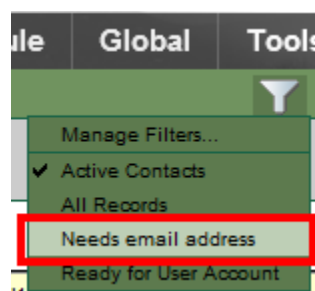
This filter will isolate any contacts who do not have an email address. As illustrated below, this contact needs an email address entered, or she will not receive an email advising that her account is ready for use:

	0 of 1 selected					Needs email address	
Name	Type	Address	HomePhone	WorkPhone	Email1	User
Adamson, Lisa		2453 View Heights Way	(250) 555-7150	(250) 555-4866		N

You can select **Modify List** from the **Options** menu to enter in the email address for this contact, and click the Green Checkmark to save the list. If you are still on the Needs email address filter, these contacts will disappear as they no longer meet that criteria.

After missing email addresses have been entered, use the "Ready for User Account" filter:
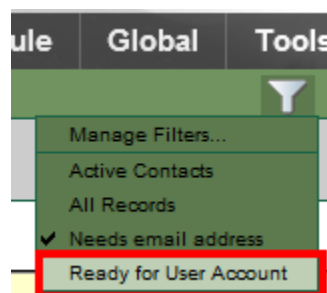
This will give you a list of every contact that will have a new User Account created because they meet the three rules that the Procedure needs to run successfully – i.e. "has portal access" is checked, there is no existing user account, and an email address is present:

	0 of 2 selected					Ready for User Account	
Name	Type	Address	HomePhone	WorkPhone	Email1	User
Adamson, Duane		2453 View Heights Way	(250) 555-7150	(250) 555-8074	56Parkies@gmail.com	N
Adamson, Lisa		2453 View Heights Way	(250) 555-7150	(250) 555-4866	headsup_west@hotmail.com	N

Important Note: You *cannot* narrow this list down by clicking the checkboxes beside a few names and choosing **Show Selected** in the **Options** menu. The Procedure will automatically create an account for *every* contact that meets the criteria of "*has portal access*" checked, and no existing User Account. If a Parent/Contact does not have an email address entered, the Procedure *will* still create a User Account for them, though they will have no way of knowing it was created nor will they know their login credentials.

Once you have established that your Contacts are set up correctly, you are ready to run the Procedure.

1.3   Running the Create Parent User Accounts procedure

Go to the **Options** menu > **Create Parent User Accounts.** A one-page Wizard displays.

Create Parent User Accounts

This procedure is set to create accounts for parents/contacts who meet the following criteria:

They have populated the primary email field on their details page or in their Set Preferences
They do not already have a User Account
They have the *family portal access indicator* checked

School	All Active Schools ▼
Login ID	
Login ID format	First Initial, Last Name ▼
Custom expression	
Password	
Password format	Mnemonic ▼
Length	
Value	
User account	
Disabled	☐
Account expiration date	🗓
Preview only	☑

Run   Cancel

Choose a single school you wish to run this in, or choose to run the procedure for All Active Schools in your District. You cannot choose multiple schools – i.e. the procedure can only be run for one school or the entire district.

As in the "Create User Accounts" procedure, you can choose the **Login ID format** from a drop down list which includes Custom Expression. If you choose that option, the information can be entered in the box below. If you do not select Custom Expression, that box will not be enabled.

There are 3 format choices for **Password**

1. Mnemonic (two 4-letter words with a 3-digit number in the middle, such as *GONE987book*). This will be assigned by the system and sent to the user.
2. Numeric (a random number containing the specified number of digits). This will also be assigned by the system and then sent to the user.
3. Constant (for example, *Oct$2014*). Enter this information in the Value box below. Custom Expression box below. If you do not choose "Constant", that box will not be enabled.

In the **User Account** area, there is a checkbox option to create the accounts Disabled. This is not recommended because Users will still receive the default email, if you run the procedure in regular not preview mode, but they will not be able to log in as their accounts are Disabled.

You can choose to have the accounts expire at the end of the school year, or any other date, by entering a date in the **Account expiration** box.

Lastly, the **Preview Only** box is to be used if you want to test what the Procedure will do, without actually creating User Accounts or sending emails. Your result will look like this:

```
Messages
========

PREVIEW MODE

SisUser account created for: Adamson, Duane

SisUser account created for: Adamson, Lisa
```

Again, these User Accounts will *not* actually be created, nor will any emails be sent by the system when you run in **Preview Only** mode.

When you run the procedure in normal mode, with Preview Only *not* checked, the following message will display:

```
Messages
========

temp/x2_8763944995903248873/results5639291332300499163.txt

SisUser account created for: Adamson, Duane
Email successfully sent dadamson@email.com

SisUser account created for: Adamson, Lisa
Email successfully sent to ladamson@email.com
```

2.0 Creating Contact User Accounts from the School View

In School view, there is no "Contacts side tab" under the School top tab, so there is no way for most users to see a list of all the student contacts in a given school. The usual way of entering a contact for a student is to go to the **Student** top tab and, after selecting a student, going to the **Contacts** side tab, and entering in that contact's information. To see the list of all student contacts for a single school, use the **Global** top tab.

2.1 The Global top tab

The **Global** top tab is a very powerful tool that can adversely affect data if you do not use it properly and carefully. The Global top tab is where you can view and modify all the data for a particular region (district or school) within one system table.
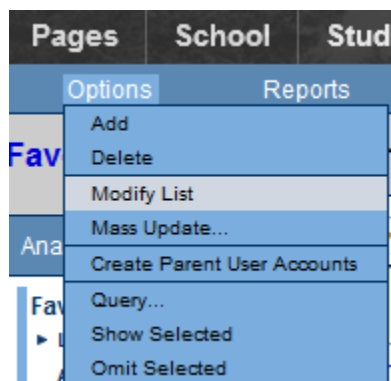
From the **Global** top tab, click the **Favorite** side tab. This will bring up two tables that will be useful to you; the one we will be using here is the Student Contact table.

Click the blue, hyperlinked name for that table, to bring up a list of all people identified as contacts within your school:

As illustrated, there are quite a few contacts listed at this school. It's unlikely that every contact here should have access to the MyEducation BC information for the student or students they are attached to. This is where the Procedure's rules come into play.

2.1.1 FIRST RULE

The first rule is that the contact needs to have the "*has portal access*" box checked. You can go to the Student top tab, Contacts side tab and manually check that checkbox for each contact that should have it, or you can edit the information from this list here, using **Modify List** on the **Options** menu:

When Modify List is selected, any column that is list-editable will have a pencil icon indicating that data in that column can be changed. IMPORTANT NOTE: Once you have made changes, you MUST click the green checkmark at the top, or they will not be saved.

2.1.2 SECOND RULE

The second rule of the procedure is that it will not overwrite an existing User Account. If your Parent/Contact already has a user account created (for example, a teacher whose child is also in MyEducation BC – not necessarily in their own district/school), the procedure will not create a new User Account for that person, nor will it modify or overwrite the existing User Account. If a User is a contact of a student at another school, and you have checked the "*has portal access*" checkbox on their student at your school, they will already have access to that student as soon as you check that box and save the record.

Y/N indicates whether or not each contact has an existing User Account. You cannot change data here; it is for informational purposes only.

HomePhone ✎	WorkPhone ✎	Email1 ✎	User	Student > Name	PortalAccess ☑ ⊗	EmergPri
(250) 555-1783	(250) 555-2949	Bruce.Adams@someplace.com	N	Woodard, Romona	☐	0
(250) 555-8133	(250) 555-9968	Damon.Adams@someplace.com	N	Sundby, Willemina	☐	0
(250) 555-6508	(250) 555-3763	Flo.Adams@someplace.com	N	Templeton, Mica	☐	3
(250) 555-1321	(250) 555-7985	Andre.Adamson@someplace.com	N	Durrance, Iannick	☐	1

2.1.3 THIRD RULE

The third rule is that all contacts must have an Email address entered. One of the features of the procedure is that it will email each contact individually once their account is created to let them know that it exists and to provide them their login name and password. If there is no email address, no email will be sent and you will need to use another method of communicating their account details. The email format, illustrated below, is set at the Enterprise level, and cannot be edited or changed by a District or School user.

Welcome to the Southeast Kootenay Parent Portal   ↑ ↓ ✕

Welcome to the Southeast Kootenay MyEducation BC PARENT PORTAL which will allow access to see grades, attendance and other information on your child(ren). Each parent or guardian will have their own separate account.
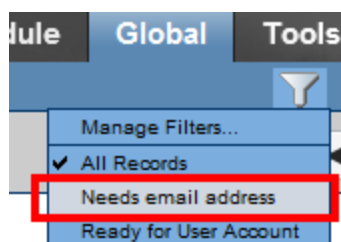
To Access the MyEducation BC System

1. Visit www.myeducation.gov.bc.ca/aspen

2. Make sure popups are enabled for your browser

3. Your user name will be: jbreeze

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5. Enter your user name and password then click Log On to access the system. You will be prompted to fill out some information to change your password so that in the future you can click "I forgot my password" to receive a new password.

Once inside the MyEducation BC system you can navigate around to view information for your student(s).

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When you are ready to create accounts for Contacts at your school, it is best practice to search first for any Contacts on the list who does have an existing User Account, who may have the '*has portal access*' box checked, but does not have any information in the Email field. There is a filter on this screen called "Needs email address":

This filter will isolate any contacts who do not have an email address. As illustrated below, this contact needs an email address entered, or she will not receive an email advising that her account is ready for use:

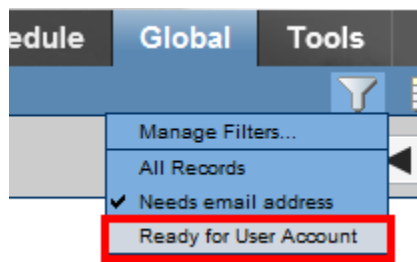You can select **Modify List** from the **Options** menu to enter in the email address for this contact, and click the Green Checkmark to save the list. If you are still on the Needs email address filter, they will disappear as they no longer meet that criteria.

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This will give you a list of every contact that will have a new User Account created because they meet the three rules that the Procedure needs to run successfully – i.e. "has portal access" is checked, there is no existing user account, and an email address is present: :

Note: You cannot narrow this list down by clicking the checkboxes beside a few names and choosing **Show Selected** in the **Options** menu. The Procedure will automatically create an account for *every* contact that meets the criteria of "*has portal access*" being checked, and not already having a User Account. If the contact does not have an email address entered, the Procedure *will* still create a User Account for them, but they will have no way of knowing it was created, nor will they know their login credentials.

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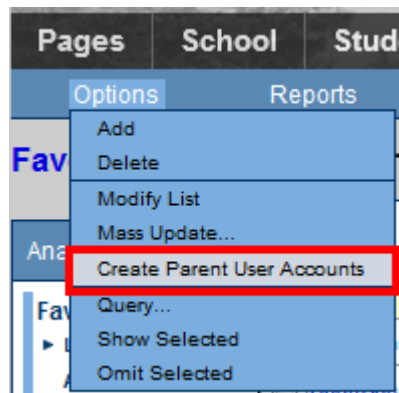
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They do not already have a User Account
They have the *family portal access indicator* checked

School	Lord Byng Secondary
Login ID	
Login ID format	First Initial, Last Name ▾
Custom expression	
Password	
Password format	Mnemonic ▾
Length	
Value	
User account	
Disabled	☐
Account expiration date	
Preview only	☑

Run Cancel

Here, as opposed to when you run this in the District view (see Section 1.0), you cannot choose the school you wish to run this in. It is already pre-selected for you for the school you are currently in.

As in the "Create User Accounts" procedure, you can choose the **Login ID format** from a drop down list which includes Custom Expression. If you choose that option, the information can be entered in the box below. If you do not select Custom Expression, that box will not be enabled.

There are 3 format choices for **Password**

1. Mnemonic (two 4-letter words with a 3-digit number in the middle, such as *GONE987book*). This will be assigned by the system and sent to the user.
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temp/x2_8763944995903248873/results5639291332300499163.txt

SisUser account created for: Adamson, Duane
Email successfully sent dadamson@email.com

SisUser account created for: Adamson, Lisa
Email successfully sent to ladamson@email.com
```

3.0 Security Roles

To restrict access to the *Create Parent User Accounts* procedure, it is available with only four Security Roles: Enterprise level, District/L1 and two new Security roles: **User Manager – District** with access to run the procedure at both District and School views, and **User Manager – School** that only has access to the School view:

These new Security Roles are "Add-On" roles, meaning they can be attached to any existing User who may have a different Security Role – e.g. a School Administrator or School Admin Assistant. Each District can determine who has the ability to run this procedure down to the User level by applying one of the add-on roles.

> **Note:** The Procedure is ONLY assigned to the Baseline Roles that exist in MyEducation BC. If you customize these roles and attach Users to those customized roles, they will not have access to the *Create Parent User Accounts* procedure.

3.1 Attaching the Security Role to a new User Account

When creating a new User Account, using the *Create User Accounts* wizard from the Options menu, you can choose the appropriate Add-On Security role when assigning the roles in Step 3 of the wizard:

Create User Accounts: Roles and Schools   Step 3 of 4

Finish the wizard as usual, and whatever Staff Records you are attaching these roles to will have access to the procedure the first time they log in. If you are creating a *District/L1* role, you do not need to add the *User Manager – District* or *User Manager – School* role, as the District/L1 role already has all of these privileges included in that role.

3.2 Attaching the Security Role to an existing User Account

3.2.1 Attaching the Security Role to a single User Account

When you have an existing User Account that you wish to grant access to the *Create Parent User Accounts* procedure, go to the **Admin** top tab > **Users** side tab in the **District** view. From there, select the account you want to update, and click the Roles leaf under the Users side tab:

To add the additional Role to this User Account, select **Add** from the **Options** menu:

When the new *Role Details* screen appears, click the magnifying glass by the Name field and navigate to the Role you wish to add:
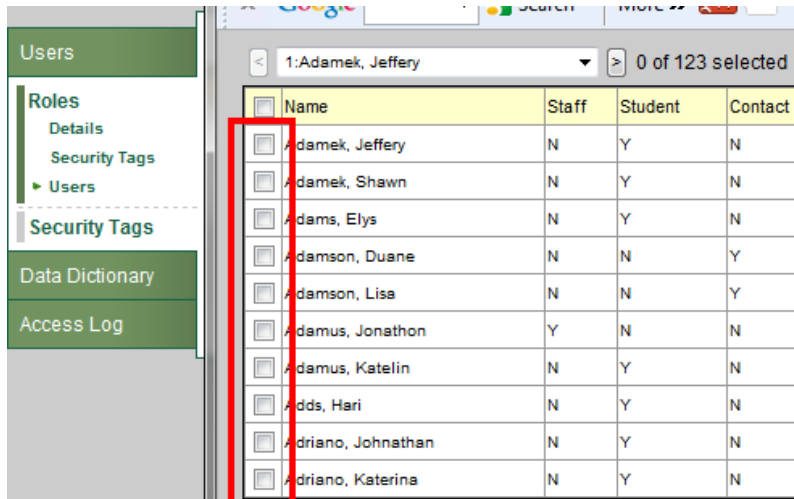

Click **OK** and **Save**, and the user will now have the new role attached:

3.2.2 Attaching the Security Role to multiple User Accounts at the same time

MyEducation BC will also allow you to add multiple existing User Accounts to a single Security Role, from the **Admin** top tab > **Security** side tab. From there, you select the Security Role you want to add the Users to, and click the Users leaf under the Roles side tab:

To add the additional Users to this Security Role, select **Add** from the **Options** menu:

When the *User Roles* pop-up appears, click the checkboxes beside the names of all the users you wish to add to this role:
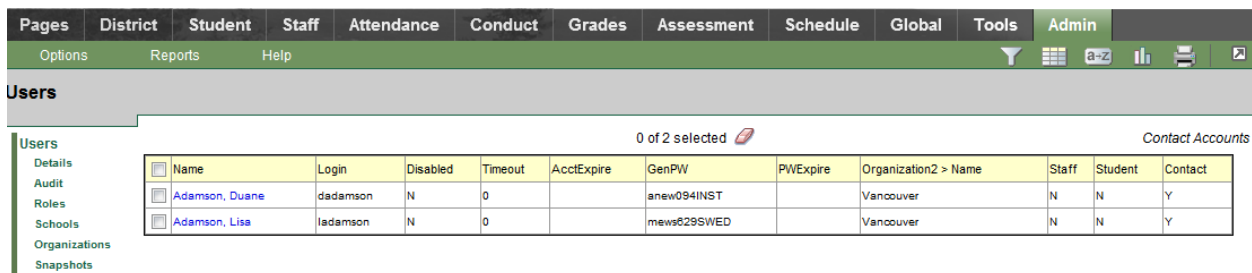
When you have selected all the Users, click the **OK** button, and your Roles will now be attached.

4.0 Maintaining User Accounts

After you have created Parent/Contact User Accounts, you can edit or delete them as you do any other User Account.

To re-create a Parent/Contact User Account, first delete the appropriate account in the **District** view from the **Admin** top tab > **Users** side tab, and run the procedure again.