

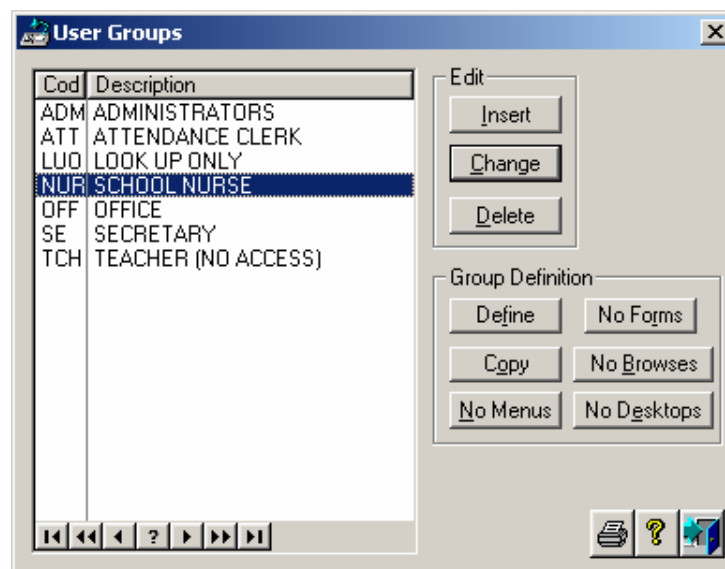
STIOffice – User Access

Creating User Groups

Instead of assigning rights to each user individually, rights are defined for *user access groups*. Users are then assigned to an access group (users can only belong to one group) according to the level of access required.

To create a group and assign access rights to it, perform the following steps:

- Go to **Teachers | User Access | Define Groups**.



- Click **Insert**. Enter a code and name for the group. Click **OK** to save.
- Once a group has been created, it will have all access rights by default.

Note: If creating a group that will have full access rights, skip the two sections below and go directly to the *Assigning Users to Groups* section.

Printing Access Options

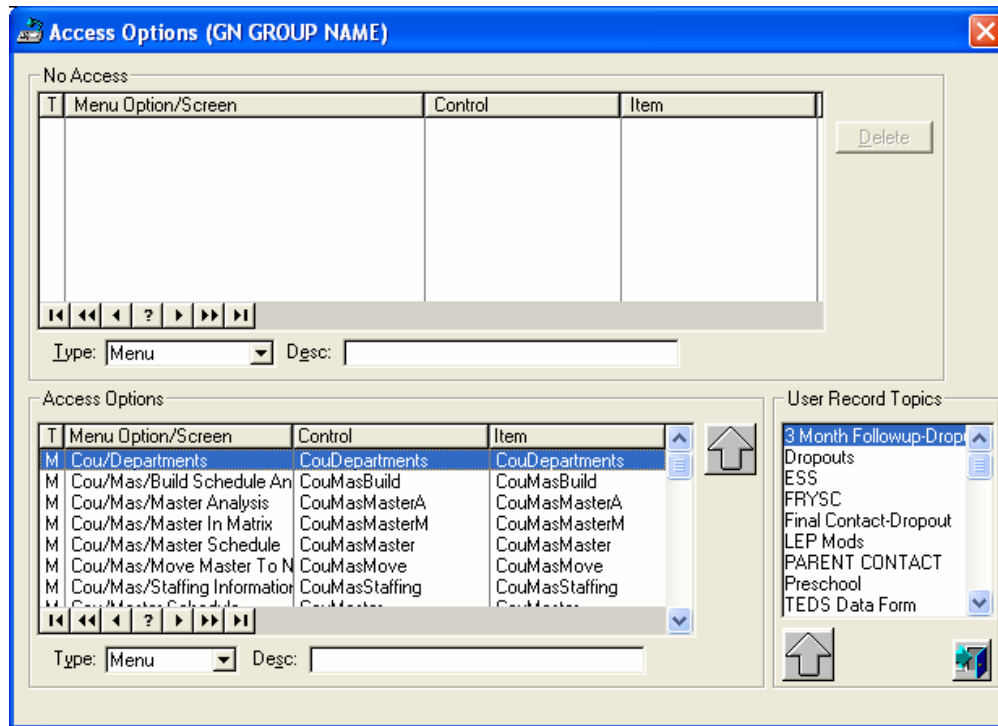
To generate a printout of all access options, select **Utilities | System Utilities | Access Options** and click the **Printer** icon.

Assigning Rights to User Groups


After groups have been created, the first step is to remove full access rights from each applicable group. There are two ways of doing this. The first method is to take rights away one by one. This is most useful with the least restricted groups. The second method is to remove all access from a group initially and return rights one by one. This is useful with the most restricted groups.

To assign rights to a group, perform the following steps:

- Go to **Teachers | User Access | Define Groups**.



- To remove all access from a group, use the series of buttons designed to remove all features of certain types.
 - **No Menus:** Removes access to menu options.
 - **No Forms:** Removes options to edit forms. This essentially creates a *view-only* access. (**OK** buttons are removed, so no saving is possible.)
 - **No Browsers:** Removes **Insert**, **Change** and **Delete** buttons.
 - **No Desktops:** Removes all buttons (not icons) from the Student Desktop and Add/Edit Student Information screens.
- To assign rights on a line-by-line basis, click the **Define** button. This opens the *Access Options* menu, which is divided into three browse boxes. The upper browse box, labeled *No Access*, displays all features that have been removed from the group. The lower browse box, labeled *Access Options*, lists all features that the group has access rights to use. The small browse box in the lower right corner, labeled *User Record Topics*, lists any user record topics to which the selected group currently has access.
 - **Removing Access:** Highlight the feature to be removed in the bottom part of the screen. Click the up arrow (↑) button located next to its respective screen. The item selected will be moved to the *No Access* portion of the screen at the top.

- **Restoring Access:** Highlight the feature to be restored in the top window. Click the **Delete** button. The item selected will be moved to the *Access Options* portion of the screen at the bottom.
- Once rights have been set, click the  icon to close the window.

Understanding Access Options

There are three different types of access areas within the *Access Options* menu:

- **Menus**
- **Screen**
- **Other**

All access features that are menu options display an *M* under the *T (Type)* column. All features that are accessed from a screen, such as buttons and icons, will display an *S* under the *T* column. All additional features are categorized as *Other*, and will display an *O* under the *T* column.

Note: When any *User Record Topic* is removed from a group's options, the topic will be marked in the *No Access* browse box with a *Type of U*.

Once the feature type has been determined, the feature description is found under the *Menu Options/Screen* and *Control* columns. The format of the *Menu Options/Screen* column describes the feature's location. If it is a menu option, the description is shortened with the first three letters representing one of the main menus. A slash (/) separates the menu from its sub-menus (Ex. *Stu/Rep/Listing* = **Students | Student Reports | Listing**). Those features that belong in the screen category are listed with full descriptions with button options appearing in the *Control* column.

Note: One exception to the rule is the *Guidance* button on the *Student Desktop* or *Add/Edit* screens. Giving access to *Guidance (Type S | Add/Edit Student Information | Guidance & Type S | Student Desktop | Guidance)* doesn't necessarily allow the user to view guidance. ONLY users who have the *Employee Type* of *Counselor* or logged in with the @@@ system supervisor password may access the *Guidance* button. This *Employee Type* is assigned in the *Teacher Edit* screen.

Below both windows are search boxes, labeled *Type* and *Description*, respectively. *Type* is a drop-box and *Description* is a text field. Use the drop-list to choose the type of feature being sought. In the text box, type the first few letters of the feature's location, remembering the rule described above (for example, to search for *Student Listing*, type *Stu* to find all *Student Menu* options).

Note: The search box will work only for the window directly above.

Because of the detail involved, defining user access is a process of trial and error. It is recommended that users create a "sample" login to use to test the *User Group* definition. It is also recommended that the administrator immediately grant user access rights to the *Login As New User* feature (*Menu type – File/Login As New User*). This enables a quick shift from the original login to the test login during testing.

Copying User Rights from One Group to Another

To copy access rights from one user group to another, perform the following steps:

- Select **Teachers | User Access | Define Groups**.
- Highlight the group to be duplicated and click **Copy**.
- Use the drop-down menu to select the new group to which the access options should be copied and click the **Apply** button.

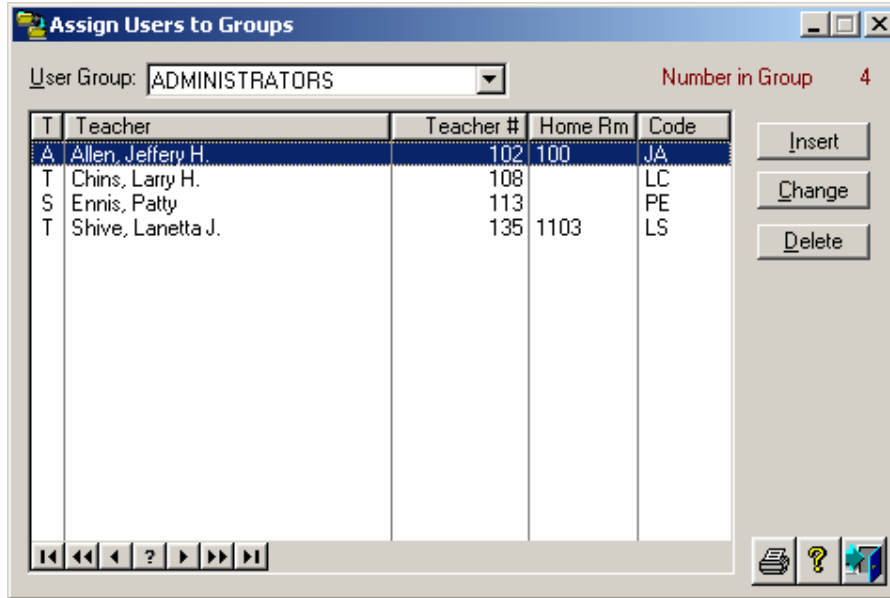
- If necessary, click the **Define** button and modify by following steps listed above under the section *Assigning Rights to User Groups*.


Assigning Users to Groups

To assign users to a *User Access Group*, perform the following steps:

Note: Each user may belong to only one access group.

- Go to **Teachers | User Access | Assign Users to Groups**.



- In the *User Group* drop-list, select the group to be assigned and click the **Insert** button.
- The *Select Teacher For Group* window will open, displaying a list of all staff.
- Locate any staff member who will be assigned to the selected group and double-click on the staff member's name. Alternately, highlight the name and click **Select**.
- In the next pop-up window, assign the *User Code* and Password for the selected person.
- Click **OK** to save.
- The window automatically cycles back to the staff list. Continue assigning users for this group as needed. When finished, click the  button.

Changing User Code or Password

Click the **Change** button to modify a staff member's user code and password. To delete a user from the group, select the user and click **Delete**.

If a user has a *User Code* and *Password*, but has not been assigned to a group, the user will have full access to the program, with the exception of the **Guidance** button on the *Student Desktop* and *Add/Edit* menus.

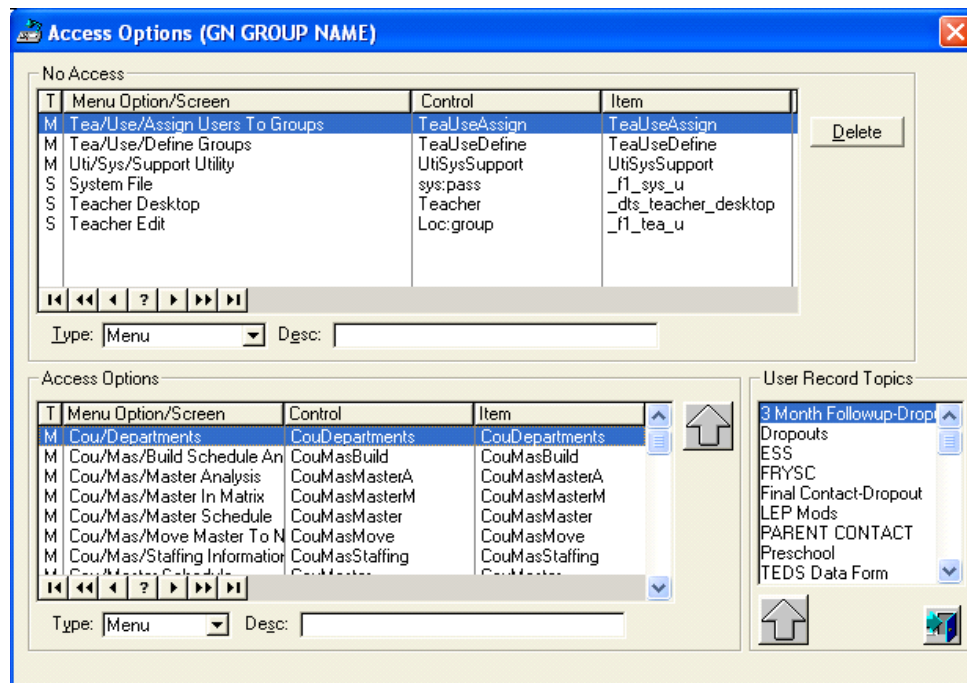
Updates and User Groups

When STIOffice updates are implemented, new menu items are added at the end of the update process. The user will be prompted to highlight any User Groups that should be given *No Access* to these new menu items. If no groups are chosen, all users will have access to the new menu items. However, the new items will be available in the Access Options screen.

Hints

When removing access from any part of the program, you may wish to consider removing all areas that would allow the user to bypass the restriction.

- Type M | Tea/Use/Assign Users to Groups
- Type M | Tea/Use/Define Groups
- Type M | Uti/Sys/Support Utility
- Type S | System File | sys:pass
- Type S | Teacher Desktop | Teacher
- Type S | Teacher Edit | Loc:group



- To enforce the marking of *read-only* in QBE filters, you must also remove the option (Type O | Cannot Change Read Only QBE Filters) from the user groups.

