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.