

# Admin Session 4:



**STAFF SCREEN**

**COMMON SEARCHES**



# Staff Screen/Common Searches & Reports



- Managing staff lists is pretty easy in E-Com. We'll walk through:
  - Creating a new staff member,
  - Changing staff IDs and names, if necessary,
  - Password assignment and changes,
  - Default login screens, and
  - Deleting –vs- “Unchecking” a staff record.
  - Optional preferences
- Then, in the time left, we'll go over some common searches and reports that admins may need to use, that are not necessarily documented in the admin manual (yet).

# New Staff Record

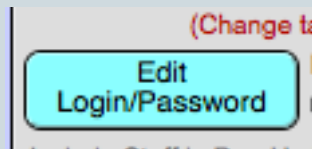


- Go to the Staff screen by clicking the pink Staff button.
- Click on the green “Create New Staff” button for a new staff screen.
- Enter the staff member’s first and last names.
- Be sure the checkbox next to “Include Staff in Pop-Up Lists” is checked – otherwise they will not be able to log in.
- Go to the Schools/Programs tab and verify the program assignment.
- If your district uses the School restrictions, you may also add schools. If you do so, and the school restriction is on in your E-Com, staff members will only be able to see the student records for students enrolled in the assigned schools.

## New Staff Record, cont.



- Now you need to edit the login user name and password, and assign an access level.
- Select the blue “Edit Login/Password” button.
- When the dialog box comes up, enter a user name (we recommend first initial, last name format – aclare, for instance.)

A screenshot of a form with two input fields. The first field is labeled "User\_ID" and contains the text "mmoney", with the number "13133" to its right. The second field is labeled "Password" and contains the text "\$4bling".

User_ID	<input type="text" value="mmoney"/>	13133
Password	<input type="text" value="\$4bling"/>	

# New Staff Record, cont.

- Enter a password. You may wish to assign a generic password that they must change after their first login – to do so, enter the password, and then check the box near the Cancel & Save buttons that says “User must change PW upon next login.”
- Check the access level. Levels 4-5 are usual for general staff, levels 2-3 for admin staff. Level 6 is read-only. A brief synopsis of levels is to the right of the dialog box; more details may be found in the Admin manual.

The screenshot shows a dialog box for creating a new staff record. It includes the following fields and options:

- User\_ID:** mmoney (ID: 13133)
- Password:** \$4bling
- Access Level:** Radio buttons for levels 2, 3, 4, 5 (selected), and 6.
- FMP Account:** Yes
- Complex password enforcement:** On.
- Additional Info:** A complex password is a combination of numbers, letters, and special characters consisting of at least 7 characters.
- Checkboxes:**  User must change PW upon next login
- Buttons:** Cancel, Save

Access Level	Description
2	Ability to edit all information, including locked forms. Can edit system preferences, export/import data, and edit user accounts. Only Admin users can lock forms.
3	Same privileges as Admin, except for the ability to import and export data and the ability to edit locked forms.
4	Primary type of account for average users. Can edit all data, but has no Admin or Manager privileges. Cannot edit locked forms.
5	Student data not editable except for Notes. All form data is editable unless form is locked.
6	All data is read only

## New Staff Record, cont.

- If “complex password enforcement” is on, that means that passwords must have a mix of numbers, letters, and special characters (!, @, #, \$, %, &), and must be at least 7 characters long. This setting may be turned on or off in Admin-> Prefs, under General Preferences.

Complex password enforcement is On.

A complex password is a combination of numbers, letters, and special characters consisting of at least 7 characters.

Preferences	District Info/Headers	Not
<b>General Preferences</b>		
Preferred #	<input checked="" type="radio"/> Student # <input type="radio"/> Local # <input type="radio"/> SSID	
Complex Password Enforcement	<input checked="" type="radio"/> Yes <input type="radio"/> No	

## New Staff Record, cont.



- Once you have saved the user name and password information, you will be back on the staff screen.
- If you use the SIS import system to update student records in E-Com, and want case manager information to be imported from Skyward, the staff ID in E-Com must match the staff ID in Skyward.
- To do so, find the staff ID for this user in Skyward. Then enter that information into the “Staff ID” box in the upper right corner of the staff screen.

The screenshot shows a form titled "Staff Information" with the following fields:

Staff ID	13133	Initials	M
First/Last	Mo	Money	
Title			

A red arrow points to the Staff ID field.

# Changing Staff Names



- To change a staff name, go to the appropriate staff screen and make the changes there. The changed name will appear in the staff lists once you have left the name field.
- It will not automatically change the user name, which must be changed manually.
- To change the user name, go to the appropriate staff screen, and select the “Edit Login/Password” button. Once the dialog box comes up, change the user name.



# Changing Staff IDs



- Please be careful changing staff IDs; the relationship between student and assigned staff is based upon the staff ID, and if you change it, you can blank the staff name on the assigned student screens.
- If you need to change the staff ID, make a note of the old one before doing so.
- Once you have changed it, you will need to do a find for student records with the old staff ID, so you can reassign them.

# Changing Staff IDs



- On the student screen, click the Find button, and enter the **old** staff ID in the yellow box next to the most common “role” for that staff member (case manager, SLP, whatever).
- Click the Find button again, and you should have all the students with the old staff ID in that role.
- Now you can do a global replace:
  - On the first student screen, enter the correct Staff ID, and make sure the name appears correctly.
  - Put your cursor back into the yellow box, so that it is selected (you may need to click twice in the box).
  - Once the staff ID field is selected, go up to the “Records” menu item at the top of the page, and select “Replace Field Contents.”

# Reset Passwords/Change User Name



- Admin users may reset user passwords or user names, if needed.
- To do so, find the staff record where the password needs to be reset.
- Click the “Edit Login/Password” button.
- Make the change. Be sure to let the staff member know the new user name or password!
- If you reset the password, we recommend using a generic password (new1234# or the like), and requiring that they change that password on the next login.

# Staff Default Screens



- On the staff record, there is a place where you can select a default screen. This will be the screen that appears when the staff member first logs in. The options are (depending on version) the roles tabs, the admin screen (for level 2 users only), to To Do tab, or the Student List.
- Note: if a staff member has an To Do item assigned, the To Do tab will appear as the default screen until that item is completed and marked as done.

# Delete -vs- Deactivate Staff Records



- You can deactivate a staff record by unchecking the box next to “Include Staff in Pop-Up Lists.”
- The staff member will no longer be able to log into E-Com once this has been done.
- Deactivation allows you to keep a record of past staff, and allows you to keep these staff members assigned to past students for purposes of documentation.
- You will be able to find the staff record and use the “My Students” button there to go to a list of all students still assigned to this staff member.

# Delete -vs- Deactivate Staff Records



- If you delete the staff record, their name will disappear from any student records where they had been assigned. (The old staff ID will remain, so you can search for them, if you know what the staff ID was, but there will be no name.)
- We recommend deactivation instead of deletion.
- If you want to clean up old staff names, deleting them after about three years is probably safe.

# Optional Preferences



- In the admin preferences, on the Staff tab (available in non-hosted districts), there are also options for restricting specific staff members to only those students assigned to them, and for blocking their ability to duplicate forms.
- In the sample shown, Jill Jackson cannot duplicate forms, and Lex Luther-Jones cannot see the records of students not assigned to him as case manager, teacher, or other.

Active	Staff Name	Title	Restrict Students	No Form Duplication
<input checked="" type="checkbox"/>	Heather Heck	Psychologist	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Jill Jackson	Special Ed Teacher	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Lex Luther-Jones	Special Ed Teacher	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mollie Macgiver	Special Ed Teacher	<input type="checkbox"/>	<input type="checkbox"/>

# Search Terms/Methods



- **Some useful search delimiters:**
  - “...” between dates (3/21/11...4/10/13), ages (8...12), and the like will find everything within that range. So if you want to find all IEPs due this month, you can hit Find, enter 4/1/13...4/30/13 in the Next Due IEP field, and then hit enter of Find again.
  - “=” will find an empty field. If you want a list of students missing some piece of data in their record, you simply click the Find button, enter an equal sign in the field, and then hit enter or Find again.
  - “>a” will find a field that has any text in it.
- Please note, at the top of the Find screen, there is an option to omit records as well as include them. So if you want to find students who are not active, for instance, you can click Find, check the Active checkbox, select Omit, and then hit enter or Find again.



# Common Searches



- Many searches are already formulated into E-Com and may be conducted with a simple press of a button.
- On the admin screen, for instance, you can find students with past due IEP or Eval dates or with other compliance issues.
- One common search is finding students who are not active in E-Com, but who are still marked as receiving Special Education services. The newest version of E-Com has a method of deactivating the Special Education checkbox on the student screen, but the version most of you have does not, and this data should be tidied before moving to the newest version.

## Common Searches, cont.



- To find students who are not active in E-Com, but who are marked as receiving SpEd services, you have to do a two-pronged search. You can do this in one step, or in two.
- For the one step process:
  - Click on the Find button.
  - Check the Special Education checkbox – we want to find students with this box checked.
  - Then, we need to omit Active students who have the SpEd box checked (because we want the list of inactive students with the SpEd box checked).
  - To do this, go up to the wide gray bar below the main menu bar, and select “New Request.”

## Common Searches, cont.



- Once you have a new request screen, check both the Active checkbox and the SpEd checkbox.
- Then, go up to the menu bar directly above the usual row of buttons. Find the section that says “Matching Records:” – change it from “Include” to “Omit.”
- You now have a double request; the first finds all students with an active SpEd checkbox, and the second omits all of those students who are currently marked as Active in E-Com.
- Once you hit the Find button, the search should run and find all the students who either need to have an end date entered in their program history for Special Education, or who need to be reactivated in E-Com.

## Common Searches, cont.



- You can run the same search in a two-step process, if you would rather.
  - First, do a search for all students with an active SpEd checkbox.
  - Once you have the results of that search, click the Find button again.
  - Check the Active checkbox, check the SpEd checkbox, and select “Omit” in the matching section.
  - Then, rather than hitting Find or enter, go up to the “Requests” item on the very top menu bar, and select “Constrain Found Set.” This will omit the active students from the found set.