



An Introduction to K12Planet

Training for Account Managers

Trainer's Notes

Make sure you've gone through the Introduction for System Administrators, Account Managers, Teachers, Parents, and Students *before* this Introduction for Account Managers.

Introduce yourself and the session.

Ensure that participants have the appropriate user documentation. Copies of all user documents are available for download at www.k12planet.com/Implement (enter Support User Name and Password).

Account Managers should have the Quick Reference Card for Account Managers




Who Can Manage Accounts?

- A school staff member, such as the:
 - registration clerk
 - attendance clerk
 - school system administrator



What Do They Do?

- Generate and distribute initial user names and passwords for three user groups
 - students
 - contacts
 - staff
- Communicate with staff
- Manage user accounts on an on-going basis
 - change accounts
 - merge accounts
 - work with orphan accounts



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How Do You Create Accounts?

- Enter your email address in K12Planet
- Print the log on report by user group
 - initial user names and passwords that users need to log on to K12Planet the first time are automatically generated
- Save the report as a text file

<p><small>From: webmaster@K12Planet.com Sent: Thu 8/24/00 12:32 PM</small></p> <p><small>To: sherylc@chancery.com</small></p> <p><small>Cc:</small></p> <p><small>Subject: K12Planet Print Report - Merged File</small></p> <p style="margin-top: 10px;">To download the file (MS Word), click on the link below and login to K12Planet. This file will remain on the server for two (2) days from the date you receive this message.</p> <p>K12Planet</p>	<p>School Description: Chancery Elementary School</p> <p>User Name: SHERYLA</p> <p>Password: ChiNnol2</p> <p>Last Name: Allen</p> <p>First Name: Sheryl</p> <p>Homeroom Number: D114</p> <p>Mailing Address 1: 1009 Douglas House</p> <p>Mailing Address 2: 1600 Beach Avenue</p> <p>Mailing City: Vancouver</p> <p>Mailing State: BC</p> <p>Mailing Zip: V6G 1Y8</p>
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Trainer's Notes

Show My Settings > Change Email.

Demonstrate how to enter your email address.

Show Accounts > User Accounts.

Demonstrate how to print passwords for the first 100 accounts.

For procedures, see Quick Reference Card for Account Managers, or “Completing an Account Manager’s Set Up” in the K12Planet System Administrator Guide.



How Do You Distribute Accounts the First Time?

- First, ensure you have parental or school consent
- Print the log on report
- Create form letters
 - Send letters via the postal service
 - Have users pick letters up in person

Trainer's Notes

Discuss how to do a mail merge using Microsoft Word.

For procedures, see "Completing an Account Manager's Set Up" in the K12Planet System Administrator Guide.



How Do You Manage Accounts?

- Change user account information
 - user name
 - password
 - email address
 - school bulk mail preference
 - access: active, inactive or onhold
- Merge contact accounts (same school and custody rights)
- Separate contact accounts
- Work with orphan accounts after each full replication to K12Planet

Trainer's Notes

Show Accounts > Find > User Accounts.

Account managers can merge student accounts so that a parent needs only one user name and password to view information for all their students who attend the same school.

Show Accounts > Manage Contacts

Access:

Active to let the user access K12Planet (when a user account is printed, the status is set to Active by default)

Inactive to not let that user access K12Planet even though the user account is enabled, pending some action, such as getting parental consent to let a child use K12Planet

Onhold to not let that user access K12Planet when the user account is not enabled, pending some action, such as reattaching an orphan account

Show Accounts > Orphan Accounts

Orphan accounts are student, contact, or teacher records that exist but have no data in K12Planet, and don't exist in the SMS. For procedures, see "Orphan Accounts" in the K12Planet System Administrator Guide.

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	User Name	User Access	Reattach
<input type="checkbox"/>	6324966694	ONHOLD	
<input type="checkbox"/>	5002933980	ONHOLD	
<input type="checkbox"/>	6535501325	ONHOLD	

On Hold Delete

Type User Name:

Master Account
 User Name: MOM Status: Master Record

Associated User Accounts

New Master	User Name	Account Status	Select to Separate
<input type="radio"/>	DAD	Inactive	<input type="checkbox"/>

Make Master Account Separate Selected Users

Merge User Account:
 User Name:

User Accounts > Results > Details
[User Detail](#) | [Logon Info](#) | [Access History](#) | [Export Report](#)

User Detail

Name	Ms. Sheryl Allen
Department	Mathematics
Position	Teacher
Homeroom	D1114

Logon Info

Account: Active

User Name:

Password:

Retype password:

Email:

Mail preferences: Postal Service, Email

Trainer's Notes

Demonstrate how to change user account information and merge accounts.