



K12Planet.com™

Quick Reference Card For Account Managers

This card outlines everything you need to print, distribute, and manage your school's K12Planet user accounts.

Software Requirements

To view K12Planet, you must have:

- Microsoft® Internet Explorer 4.0 or higher, or
- Netscape® Navigator 4.0 or higher

To print user accounts, you must have:

- For PC, Microsoft Word 2000 or higher, or
Microsoft Windows® 95/98/NT and a Microsoft Word document viewer (to download a viewer, go to:
www.officeupdate.microsoft.com/2000/downloaddetails/wd97vwr32.htm)
- For Macintosh, Microsoft Word 98 or higher

Starting K12Planet

- 1 Point your browser to www.K12Planet.com.
- 2 Click Log on.

User Name:

Password: You must type the exact up case characters and numbe

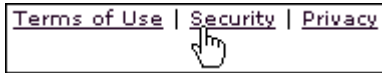
- 3 If a security alert displays, click Yes or OK.
- 4 Type your user name and password, and then click Log On.
- 5 The first time you log on, read the welcome message, and then click Continue. The Change Password page displays.
On subsequent times, the User Accounts page displays.

Understanding Internet Security

While working in K12Planet, you are protected by the most powerful security available. Data transferred between your computer and the K12Planet server cannot be read or changed while in transit.

To protect everyone that uses K12Planet, help your school establish privacy and security strategies and create an acceptable use policy, and then educate school staff and the school community. For more information, see the K12Planet System Administrator Guide.

For details about Internet security, at the bottom of any K12Planet page, click Security.



Changing Your User Name and Password

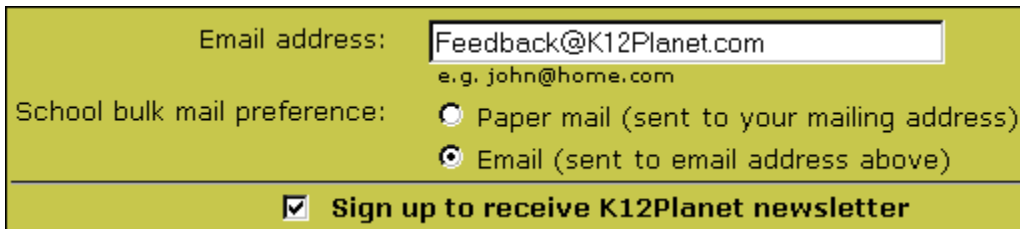
After you first log on, change the user name and password you received from Chancery immediately. After that, change your password regularly.

- 1 Click My Settings.
- 2 On the Change Password page, change the appropriate information, and then click Save.

Setting Up Your Email

To print user names and passwords for your school community, enter an email address in K12Planet. Entering an email address also lets you communicate with school staff and Chancery.

- 1 Click My Settings, and then click Change Email.
- 2 Type your email address.
- 3 Specify where you would like to receive school bulk mail: at your postal or email address.
- 4 To receive a newsletter about K12Planet activities, select "Sign up to receive K12Planet newsletter".



- 5 Click Save.

Sending Email

On any page, except the User Accounts Results page, when a person's name is underlined, you can click it to email that person. When a name is not underlined, that person has not set up their email address in K12Planet.

Printing User Accounts

To distribute user accounts to each person in your school's database, print a Logon Report. A Logon Report is a mail merge document that contains a random 10-digit user name and 10-digit password for each person to log on to K12Planet the first time.

You can also generate a mail merge document for one person or a group of people in your school's database. For example, small groups are staff and school system administrators; large groups are students and contacts. We recommend you chunk large groups into several mail merge documents.

If you would like to print one large Logon Report, you must schedule the process with Chancery Technical Support (phone 1-800-688-9939).

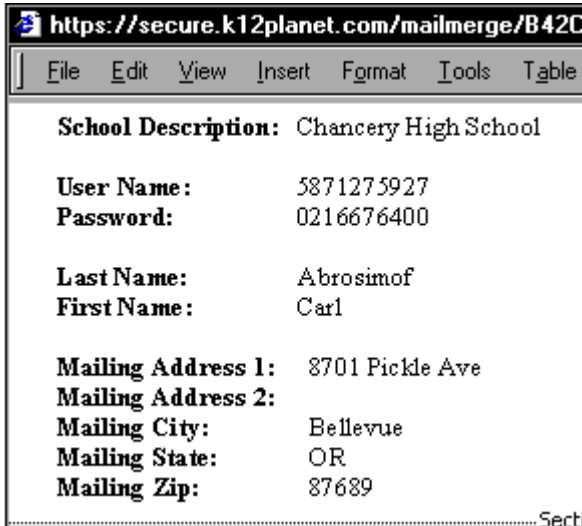
Printing All User Accounts

- 1 Click Accounts. The User Accounts page displays.
- 2 Click "Group Search & Print".
- 3 Choose a user group, and choose a sort order (if desired).
- 4 Click Print All.

You will receive a webmaster@K12Planet.com email containing a link to a mail merge document. It could be any time from a few minutes to a few days before you receive it, depending on the number of documents already in the K12Planet server queue.

- 5 To print, open the email and follow its instructions.

The mail merge document looks similar to this:



If you want, create a header and footer for the document.

- 6 Repeat the steps above for the remaining user groups.

Printing One or Several User Accounts

- 1 Click Accounts. The User Accounts page displays.
- 2 Click "Group Search & Print".
- 3 Choose a user group, and choose a sort order (if desired).
- 4 Click Display All.
- 5 Click Select All to select all the user accounts on the current page, or select one or more user account checkboxes. If it is a large list of accounts, to display the next page, click Next 100.
- 6 At the top of the list, from the "For selected accounts" popup menu, select:
 - "Quick Print (No Update Last Printed)" to print the Print Report document and not update the date in the Last Printed column. For example, to not update this date when an account is only being printed for school records.
 - "Print And Update Last Printed" to print the Print Report document and update the date in the Last Printed column. For example, when accounts are being distributed. The Last Printed column displays the date each account was last printed using "Print And Update Last Printed".
- 7 To print, open the webmaster@K12Planet.com email and follow its instructions.

If you want, create a header and footer for the document.
- 8 Repeat steps 5 through 7 above for other accounts in this group (if applicable).
- 9 Repeat the steps above for the remaining user groups.

Distributing User Accounts

After printing the necessary mail merge document(s), ensure you have parental or school consent before you display information about students who are under 13 years of age. You can only distribute user accounts to a student and their contacts after verifiable, informed consent has been granted.

Determine the most effective method to safely provide user names and passwords to your school community. Face-to-face meetings are the best. Other methods include sending registered mail, or placing an acknowledgment of receipt form with each user account in a sealed envelope and having students take it home.

Helping Users Log On

If a user remembers their user name and password, but is having trouble logging on:

- Ensure he or she is typing the exact uppercase and lowercase characters. Are the user name and password spelled correctly?
- Check that their user account status is active. For procedures, see “Setting Up Access to K12Planet.”

If a user remembers their user name, but can't remember their password:

- If the user has previously entered an email address in K12Planet, tell them to open the Logon page, click Request Password, and then follow the onscreen instructions.

Forgot your log on information?

To have your password emailed to you, click **Request Password**.
For information about this page, click the Help button.



If a user can't remember their user name:

- In K12Planet, change the user name and password, and then notify the user. For procedures, see “Changing User Accounts” below.

Changing User Accounts

Only you and the school system administrator can change another person's user name, password, email address, and school bulk mail preference. Each user can also change his or her own account information.

To change user account information:

- 1 Click Accounts. The User Accounts page displays.
- 2 To search for a user account by group, click “Group Search & Print”, choose a user group, choose a sort order (if desired), and then click Display All.

Or, to search for an individual user account, click Search, type one or more characters in one or more fields, choose a sort order (if desired), and then click Search.

- 3 From the Results, click a user name. That person's user account details display.
- 4 Click Logon Info.
- 5 Change the appropriate information.
- 6 Click “Save My Changes”. Notify the user of any changes to their account.

To print the user account summary:

- 1 Click Accounts. The User Accounts page displays.
- 2 To search for a user account by group, click “Group Search & Print”, choose a user group, choose a sort order (if desired), and then click Display All.

Or, to search for an individual user account, click Search, type one or more characters in one or more fields, choose a sort order (if desired), and then click Search.

- 3 From Results, click a user name. That person's user account details display.
- 4 Click the Export Report link, and then click Export Report.
- 5 Open the email from webmaster@K12Planet.com and follow its instructions.

Setting Up Access to K12Planet

Only you and the school system administrator can change a user account's access. Choose:

- 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

To change the status of one user account:

- 1 Click Accounts.
- 2 Click "Group Search & Print", choose a user group, choose a sort order (if desired), and then click Display All.
Or, click Search, type one or more characters in one or more fields, choose a sort order (if desired), and then click Search.
- 3 From the Results, click a user name.
- 4 Click Logon Info.
- 5 From the Account popup menu, select the access.
- 6 Click "Save My Changes".
- 7 Notify the user of the changes to his or her account.

To change the status of several user accounts:

- 1 Click Accounts.
- 2 Click "Group Search & Print", choose a user group, choose a sort order (if desired), and then click Display All.
Or, click Search, type one or more characters in one or more fields, choose a sort order (if desired), and then click Search.
- 3 From the Results, select the user accounts' checkboxes.
- 4 From the "For selected accounts" popup menu at the top of the list, select:
 - Activate to allow users to access K12Planet, or
 - Inactivate to prevent user access to K12Planet.
- 5 Notify the users of the changes to their accounts.

Merging User Accounts

You can merge contact accounts, so a parent or guardian only need enter one user name and password to view all his or her children's information.

To merge user accounts, the contacts must have the same custody rights selected in Win School or Mac School and their children must be enrolled in the **same school**.

Parents and guardians can also merge or separate their own user accounts.

- 1 Click Accounts, and then click Manage Contacts.
- 2 Type the contact user name that the parent or guardian will enter to log on and view all his or her accounts at one time. This will be the master account.
- 3 Click Find Account.
- 4 In the Merge User Account section, type another contact user name. When this account joins with the master account, it is called the associated account.
- 5 Click Add Account.
- 6 Click "Yes, Merge Accounts".
- 7 To attach additional accounts, repeat steps 4 through 6 above.

After a user account has been merged, that account no longer displays in the Results page.

- 8 Notify the contact that the accounts have been merged, and describe how he or she can use the new popup menu in every K12Planet page.



Separating Merged User Accounts

You can separate merged accounts, for example, if a contact's custody rights change.

- 1 Click Accounts, and then click Manage Contacts.
- 2 In the User Name field, type the master account user name, and then click Find Account.
- 3 In the Associated User Accounts list, below the "Select to Separate" title, select the checkboxes of those accounts you no longer want merged.
- 4 Click "Separate Selected Users".
- 5 Click "Yes, Separate Accounts".
- 6 Notify the contact that the accounts have been separated.

Managing Orphan Accounts

Each time your school's data is fully replicated to K12Planet, check for orphan accounts. An orphan account is a user account that previously existed in K12Planet, but no longer exists in Win School® or Mac School®.

Orphan accounts are generated when your school copies its entire database to K12Planet – not when it replicates only database changes. Ask your school's system administrator to notify you when doing a full replication to K12Planet.

You can reattach an orphan account to an existing account, as well as put an orphan account on hold, set it to inactive, or delete it. Inactive orphan accounts are permanently deleted during the next full replication.

For procedures, see the K12Planet System Administrator Guide.

Exiting

When you finish using K12Planet, click Exit. For added security, we recommend you close your browser.

Getting More Information

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| Documentation | • See the K12Planet System Administrator Guide. |
| Online Help | • On the top of every K12Planet page, click Help. |
| Chancery Technical Support | • Email techsupp@chancery.com . |
| | • At the bottom of the K12Planet online Help window, click Technical Support, and then follow the onscreen instructions. |
| | • Phone Technical Support at 1-800-688-9939. |
| Chancery's knowledgebase | • Go to support.chancery.com , type your Chancery Support (not K12Planet) user name and password, click OK, and then click the K12Planet.com icon. |

Providing Feedback

We encourage you to help make the K12Planet web site even better by emailing your suggestions to feedback@K12Planet.com.



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