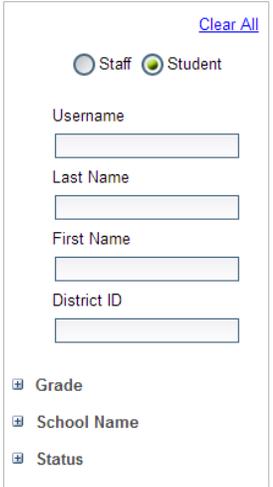


## 6.3.2: Manage and Modify Existing Users

### Overview

This procedure is used whenever you need to locate a specific user, view the groups and/or classes the user belongs to, edit a users' information or enable/disable/delete a user. District Administrators within Classworks can also search for and resolve duplicate users.

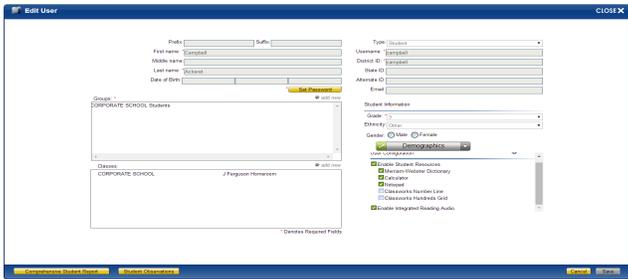
### Search and Locate a User

Step	Action
1	<p>Click the <b>Administration Tab</b>.</p>  <p>Click on the <b>Users Sub-tab</b>.</p> 
2	In the right-hand panel select the appropriate fields/filters to locate and display your user(s).
3	<p>Filter by:</p> <ul style="list-style-type: none"> <li>• Staff or Student</li> <li>• Username, Last name, First name, and District ID</li> <li>• Grade (K-12)</li> <li>• School Name</li> <li>• Status (enabled or disabled)</li> </ul> 

*Continued on next page*

## 6.3.2: Manage and Modify Existing Users, continued

### View User's Group and Classes

Step	Action
1	<p>Clicking the user's last name opens the Edit User window.</p> <p>The groups a user belongs to are shown in the Groups field, the Classes are displayed in the Classes field.</p> 

### Edit User Information

Edit options include:

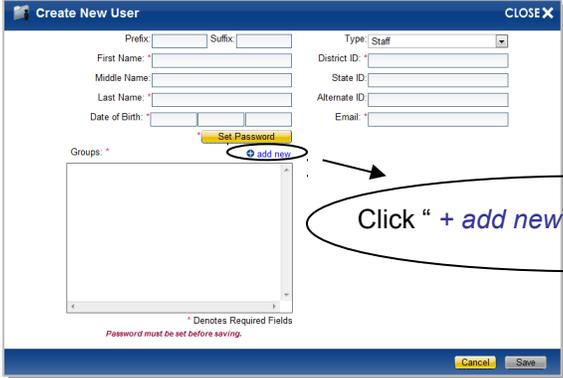
- Update user's name, username, ID, password, grade.
- Edit student demographic information.
- Student resources are defaulted on. Uncheck any resource(s) you do not want the student to access. (**See job aid 1.4- Orient Students or click the ? for more information**)
- **(Optional)** Select the box to enable integrated reading audio.
- Edit staff email address.

Step	Action
1	To edit a user, click on the staff or student's last name. The Edit User window will appear.
2	Update the appropriate information and click <b>Save</b> . 

*Continued on next page*

## 6.3.2: Manage and Modify Existing Users, continued

### Add a User to a Group

Step	Action
1	From the <b>Administration Tab &gt; User Sub Tab</b> , click on a user's name. The Edit User window will appear.
2	From the Edit User window, add user to a group by clicking the blue <b>+ add new</b> link. The Add User to Groups screen will display. 
3	Click the + symbol to expand the correct school.
4	Put a check in the box beside the group you want to add.
5	Click the <b>Add</b> button. The new group will now be listed in the Groups box.
6	When you are done editing the user information, click the <b>Save</b> button. 

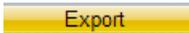
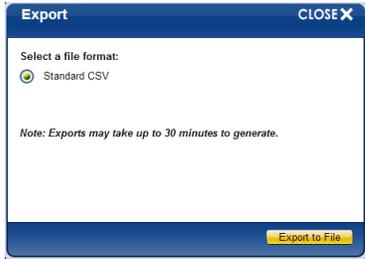
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## 6.3.2: Manage and Modify Existing Users, continued

### Export a Group of Users

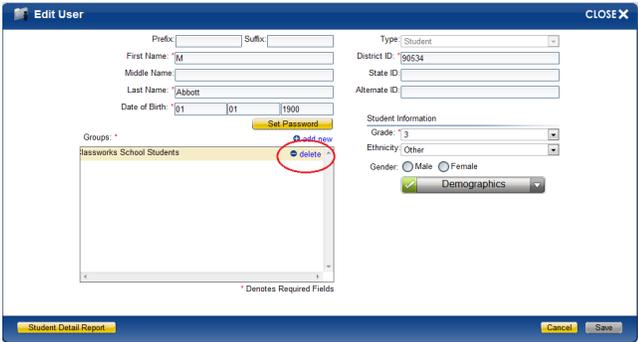
You have the ability to export a set of users to use the bulk enrollment functionality to add the users to a new group, such as a custom group, or modify the properties of the users. This may include adding fields such as demographics or updating fields in mass.

To export users out of the Classworks manager into a .csv file:

Step	Action
1	From the <b>Administration Tab &gt; Users Sub Tab</b> , use the filters on the right hand side of the screen to locate the appropriate students. ( <b>Note:</b> You can always remove users from the exported .csv file if needed.)
2	Click the <i>Export</i> button. 
3	<p>Click the <i>Export to File</i> button.</p> <p>The following fields will be exported:</p> <ul style="list-style-type: none"> <li>- District ID      - Grade</li> <li>- Username        - Password (Student Only)</li> <li>- Last Name       - School SIS ID</li> <li>- First Name      - Email</li> <li>- Birthdate       - User Type (0= student 1= staff)</li> </ul> <p><b>Note:</b> It will export all users that match the current search criteria determined by the filters selected.</p> 
4	<p>For directions on how to utilize the bulk enrollment functionality, locate <i>Job Aid 6.7 Enrollment Import</i> in the Classworks resource center.</p> <p>For additional information on Custom Groups, locate <i>Job Aid 6.4.2 Custom Groups</i> in the Classworks resource center.</p>

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### 6.3.2: Manage and Modify Existing Users, continued

Remove User From a Group	Step	Action
	1	From the Administration tab > User sub-tab, click on a user's name. The Edit User window will appear.
	2	In the Group panel, hover your mouse over the name of the group you want to remove. The word Delete will appear.
	3	Click on the word <b>Delete</b> .  
	4	Click <b>Save</b> . 

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## 6.3.2: Manage and Modify Existing Users, continued

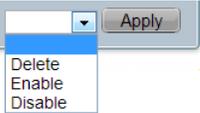
### Enable/Disable a User

Use this option when you want a user to remain in the *Classworks* manager, but not allow access to the student or teacher module. This allows for ease of reactivation of students/staff who leave the school district and then later return. If a user has too many incorrect login attempts, they will be disabled. Use this functionality to enable them again.

Step	Action
1	From the Administration tab > Users sub-tab, select the user or users to be disabled.
2	Click the Mass Actions drop-down in the lower right and select Disable or Enable. 
3	Click <b>Apply</b> . 

### Delete a User

**Note:** It is recommended that inactive users be disabled rather than deleted. When a user is deleted, all of that user's data is deleted as well.

Step	Action
1	From the Administration tab> Users sub tab, place a check beside the name of the student or students you wish to delete. 
2	Click the Mass Actions drop-down in the lower right and select Delete. 
3	Click <b>Apply</b> . 

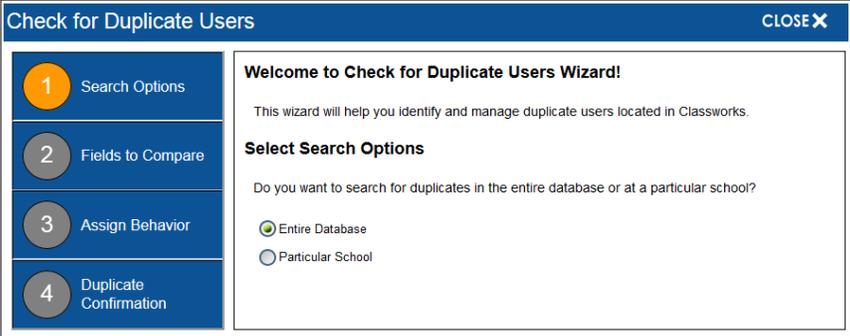
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## 6.3.2: Manage and Modify Existing Users, continued

### Check for Duplicate Users

**Note:** This functionality is available to only users with District Administrative rights within Classworks.

Use this wizard to help you identify and manage duplicate users located in Classworks.

Step	Action
1	From the Administration tab > Users Sub-tab, click on the <b>Check for Duplicates</b> button. 
2	Select your search option. Options include: <ul style="list-style-type: none"> <li>Entire database</li> <li>Particular school (a drop down menu will appear with a list of schools when this option is selected)</li> </ul> 
3	Click the <b>Next</b> button. 

*Continued on next page*

## 6.3.2: Manage and Modify Existing Users, continued

### Check for Duplicate Users, continued

Step	Action
4	<p>Select TWO or more fields to use when comparing/locating duplicate users in the system.</p> <div data-bbox="578 646 1468 953" style="border: 1px solid black; padding: 5px;"> <p><b>Select User Fields to Compare</b></p> <p>Select two or more user fields to compare when searching for duplicate users.</p> <div data-bbox="607 743 1446 953" style="border: 1px solid black; padding: 5px;"> <p><b>User Fields</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Last Name</li> <li><input type="checkbox"/> First Name</li> <li><input type="checkbox"/> Middle Name</li> <li><input type="checkbox"/> Birthday</li> <li><input type="checkbox"/> Email Address</li> <li><input type="checkbox"/> Username</li> </ul> </div> </div>
5	<p>Click the <b>Next</b> button. </p>
6	<p>Decide what default action Classworks should take with the duplicates found. Options include:</p> <ul style="list-style-type: none"> <li>• <b>Merge the duplicate with the user that has the most usage or least usage.</b> i.e. Two Johnny Smith's are located. One of them has more Time on Task than the other. The Johnny with less time on task will be merged into the user with the higher time on task or vice versa. Time on task includes time spent in both instruction and assessments.</li> <li>• <b>Delete all but the user with the most usage or least usage.</b> i.e. Two Johnny Smith's are located. One of them has more Time on Task than the other. The Johnny with less time on task will be deleted or vice versa. Time on task includes time spent in both instruction and assessments.</li> </ul> <p><b>Note:</b> You will have the ability to confirm these actions on the next screen.</p>
7	<p>Click the <b>Next</b> button. </p>

Continued on next page

## 6.3.2: Manage and Modify Existing Users, continued

### Check for Duplicate Users, continued

Step	Action																									
8	<p>Confirm the actions Classworks will take with each of the duplicates found.</p> <ul style="list-style-type: none"> <li>• Each “set” of duplicates will display separately.</li> <li>• The total number of duplicates found is displayed above the school &amp; usage columns.</li> <li>• You can change the action by changing the status drop-down menu (descriptions of each action are listed on the screenshot below).</li> </ul> <div data-bbox="548 850 1409 1438" style="border: 1px solid black; padding: 10px;"> <p><b>Duplicate User Confirmation</b></p> <p>The status (PRIMARY, MERGE, DELETE, IGNORE) can be modified by selecting the drop down on the row you want to change.</p> <p><b>Primary:</b> This is the user that will be kept when the operation is completed.  <b>Merge:</b> These users will be merged into the Primary user, meaning all instructional and assessment results will be moved under the Primary record.  <b>Delete:</b> All associated instructional and assessment results will be removed from Classworks and the Primary record will be kept.  <b>Ignore:</b> The user will not be affected.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Status</th> <th>Last Name</th> <th>First Name</th> <th>Birthday</th> <th>School</th> </tr> </thead> <tbody> <tr> <td>Primary</td> <td>Ponder</td> <td>Billy</td> <td>10-27-1979</td> <td></td> </tr> <tr> <td>Merge</td> <td>Ponder</td> <td>Billy</td> <td>10-27-1979</td> <td></td> </tr> <tr> <td>Merge</td> <td>Ponder</td> <td>Billy</td> <td>10-27-1979</td> <td></td> </tr> <tr> <td>Merge</td> <td>Ponder</td> <td>Billy</td> <td>10-27-1979</td> <td></td> </tr> </tbody> </table> <p style="text-align: right; border: 1px solid red; border-radius: 50%; padding: 2px; display: inline-block;">6854 duplicates remaining</p> <div style="text-align: right; margin-top: 10px;"> <span>OK</span> <span>OK All</span> <span>Skip</span> </div> </div> <p> <span>⚠</span> <b>OK button:</b> Confirms <u>and performs</u> the statuses selected for the user displayed and moves you on to the next duplicate user found.                 </p> <p> <span>⚠</span> <b>OK All button:</b> Confirms <u>and performs</u> the statuses selected for all the duplicate users found. Use this option if you do not wish to confirm the actions one user at a time.                 </p> <p> <span>⚠</span> <b>Skip button:</b> Skip moves you on to the next duplicate user. No action will be taken for that duplicate user.                 </p>	Status	Last Name	First Name	Birthday	School	Primary	Ponder	Billy	10-27-1979		Merge	Ponder	Billy	10-27-1979		Merge	Ponder	Billy	10-27-1979		Merge	Ponder	Billy	10-27-1979	
Status	Last Name	First Name	Birthday	School																						
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