

Adding or Removing School Level Users

Adding or Removing School Level Users

LEA user access adminstrators can assign or delete school-level roles.

- **School Plan Data Entry** These users edit and submit school plans. These users are usually assistant principals or other school personnel.
- **School Plan Reviewer** These users review and approve or not approve school plans. These are usually principals.

Steps to add or remove roles for a school-level user:

1. Hover over Administer and select "User Access."



- **2.** Type in the user's last name or email address and select search.
 - a. Select the note for Administer Roles as highlighted below.

User Access						
Create User						
Search Users						
Last Nam	ne: help					
Email Addres	ss: ePlan.help@tn.go	w				
Ro	le:			~		
Organization Nam	ne: Begins With 🗸					
Organization Number	er:					
	Search Reset					
There are 1 matching record(s). Displaying	1 through 1.					
Email Address	First Name	Last Name	Reset Password	Administer Roles	Delete All Roles	User History
ePlan.Help@tn.gov	ePlan	Help	Reset Password	B	Û	View

3. The next screen *Administer Roles* allows users to create roles.

Department of Education			No. 1
Administer Roles			
Return to User Access			
Create Role			
	Roles		
Email Address	Organization	Role	Delete
Baltimore, Anika (abaltimore@kippnashville.org) has not been assigned to any roles, has been deactivated, o	or has not been assigned to any roles that you can delete.		

4. If an individual is not registered in ePlan, select "Create User" to add them as a new user.

This is the TEST site. Please be sure to complete Create User	e your work on the LIVE site.
Search Users	
Last Name:	asrewt
Email Address:	
Role:	
Organization Name:	Begins With 🔻
Organization Number:	
	Search Reset
	Search Reset



5. Enter their contact information and then select "Create."

Create User	
This is the TEST site. Please be sure t	o complete your work on the LIVE site.
Create User	
Email Address:	
First Name:	
Last Name:	
Phone Number:	<u>···</u>
Phone Extension:	
Fax Number:	
	Create

- **6.** Click the administer roles as shown in step two to add the roles.
- **7.** The next screen will show any current roles for the user. Select "Create Role" as highlighted below to go to the next screen and assign the user a new role.

TN	Department of Education			and the second s
ePlan Home	Administer Roles			
Administer	Administer Roles			
Search	Data and the second			
Reports	Return to User Access			
Inbox .	Create Role	17 - 1 7		
TDOF Resources		Roles		
	Email Address	Organization	Role	Delete
Help for Current Page	rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)	School Plan Data Entr	y ÎÎ
Contact TDOE	rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)	School Plan Reviewer	n
Plan Sign Out				

- **8.** After the "Create Role" screen loads, select the following:
 - a. The school for which this person should be assigned the roles.
 - b. The roles for the individual; the School Plan Data Entry and/or School Plan Reviewer.
- 9. Click the box to the left of the role names to select a role. Then select "Create."

Create Role	
Create Role	
Email Address:	rainelei100@wcschools.com
Organization:	LEA: School: Wilson County (950) ▼ Carroll Oakland Elementary (950-0005) ▼
Role:	0 Option(s) selected. Select All / Deselect All School Plan Data Entry
	Create Cancel



10. To remove a role from an individual, select the trashcan icon next to the role that needs removed.

TN	Department of Education	Seller A		
ePlan Home	Administer Roles			
Search	Return to User Access			
Reports	Create Role			
TDOE Resources		Roles		
TOOL HESOLICES	Email Address	Organization	Role	Delete
Help for Current Page	rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)	School Plan Data Entry	n.
Contact TDOE	rainelei100@wcschools.com	Mt. Juliet Middle School (950-0032)	School Plan Reviewer	1
E er ian olgn Out				

11. Review the user's roles and see the new roles that were added or removed.

Contact Information

User access administrators can also update contact information and send password resets to users who do not use Orion Single Sign On (SSO).

Steps to update contact information:

1. Search for the user first.

<u>Create User</u> Search Users	
Last Name:	aitken _
Email Address:	
Role:	
Organization Name:	Begins With
Organization Number:	
	Search Reset

2. Click on the underlined name. If the reset password column shows "Password Set in TDOE Orion," the user's information cannot be updated using this method. From the example below, Alexander Aitken and John Aitken could not have their information updated.

Email Address	<u>First Name</u>	Last Name	Reset Password
alex.aitken@hcsk12.net	Alexander	Aitken	Password Set in TDOE Orion
jaitken@bartlettschools.org	John	Aitken	Password Set in TDOE Orion
jaitken@colliervilleschools.org	John	Aitken	Reset Password
sarah.aitken@hcsk12.net	Sarah	Aitken	Reset Password

- **3.** The Update User screen contains the contact information for this user.
 - a. Any of the contact information with editable fields can be changed.
 - b. Please note that if the *Linked to TDOE Orion* line contains a checkmark, the user's name and email address cannot be updated by the District User Access Administrator. The contact information must be updated by the District Technology Support Team. Please contact <u>DT.Support@tn.gov</u> for help.



Update User		
Email Address:	sarah.aitken@hcsk12.net	
First Name:	Sarah	
Last Name:	Aitken	
Phone Number:	731-772-9613	
Phone Extension:		
Fax Number:		
Linked to TDOE Orion		
		Update Cancel

- c. Even if the account is linked to TDOE Orion, the phone number and other editable fields can be updated by the district user access administrator.
- **4.** Click **Update** to save the changes.
- **5.** Note: Users can access and update their own contact information by clicking the user name underneath the left navigation menu.



Resetting a password.

Users that do not use Orion SSO can have a password reset link sent to their email to reset their ePlan password. There are two ways a user can have this link sent to their email address.

1. A user access administrator can click the **Reset Password** after searching for the user.

Email Address	<u>First Name</u>	Last Name	Reset Password
alex.aitken@hcsk12.net	Alexander	Aitken	Password Set in TDOE Orion
jaitken@bartlettschools.org	John	Aitken	Password Set in TDOE Orion
jaitken@colliervilleschools.org	John	Aitken	Reset Password
sarah.aitken@hcsk12.net	Sarah	Aitken	Reset Password

2. Users can also send this same link to their email address by clicking the **Forgot your password** link on the sign-in page.

Sign-In	
Email Address:	ePlan.help
Password:	
	Forgot your password?