

User Guide

Local Education Agency (LEA) User Manager



ACHIEVE

I o w a I D E A

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Local Education Agency (LEA) User Manager

The **LEA User Manager Role** allows specific users within a district and/or building to manage access to LEA General Supervision roles for other district and/or building staff in ACHIEVE.

Resources:

- [ACHIEVE LEA User Manager Role Description](#)
- [ACHIEVE General Supervision Roles - LEA User Manager](#)
- [Recorded Training Webinar](#)
- [Slides from recorded training webinar](#)
- [ACHIEVE General Supervision Role Assignment Tracking Template](#)
- [Current list of LEA User Managers](#)
- [Google Form to add/remove LEA User Manager role assignment](#)
- [ACHIEVE Data Lead Contacts](#)

Permissions:

- The LEA User Manager role may assign new/update existing [General Supervision roles](#) for District and Building users within the locations they are assigned in ACHIEVE.
- The LEA User Manager can add/edit/delete these select new roles, and only within the location(s) they are assigned in ACHIEVE.
- The LEA User Manager can add new users in ACHIEVE, but can only assign [General Supervision roles](#) within their assigned location(s).
- Adding or editing [General Supervision roles](#) should not impact other roles a user already has or their current permission levels and access in any way.
- If a user in the district needs roles assigned or updated that are outside of [General Supervision roles](#) (IEP/IFSP role including location/services), they will need to be assigned by a [Super Admin](#), [ACHIEVE Data Lead](#), or ACHIEVE Data Technician (if applicable). **Note:** The LEA User Manager cannot edit or delete existing roles outside the General Supervision roles. That includes being unable to add/edit/delete services assigned to users with the IEP access role.

Tracking Staff to Assign:


- Keep track of staff to assign via the [LEA Template - ACHIEVE GS Tools Access](#). Click on 'make a copy' then, update LEA in the document title with the District's name. **Note:** *as other permissions (roles) are added in the future, a new tab will need to be manually added to your district's sheet.*
- Determine with district leadership how the sheet above will be shared within the district (e.g., update access to edit) so that the appropriate staff can add information for the roles/locations assigned by the LEA User Manager.
- Share the District sheet with [ACHIEVE Data Leads](#) **after** you have updated the title to include your District.

LEA User Manager left navigation links (unless assigned other ACHIEVE roles):

- My Dashboard, My Tools, Help, System Release Notes/Updates, and ACHIEVE Support.
- In addition, under 'Administration' on the left navigation, LEA User Managers have a 'User Management' link. This link opens the User Management page and allows for

the search of **all** users in ACHIEVE. LEA User Managers may view all information already in the system, but may only edit as detailed above.

Navigation of User Management:

- Buttons ()
- Carets ()


Buttons

- Used to complete actions in ACHIEVE (blue buttons).

Carets


- Show or hide other options within a section; clicking on one shows additional options or information, and clicking on the caret again hides the options.

Drop-Down Menus

- Drop-down menus ()

- Indicated by a filled caret. Clicking on one will open a drop-down menu with options specific to the field/task. Depending on the type of field the caret is connected to, making a selection could take you to another page (like the Settings) or fill in the field with the selected item. If multiple items can be selected from the drop-down menu, items chosen will have a blue background and an “X” indicating they can be removed from the field.

Quick Access Menus

- Quick Access Menus ()

- Allow navigation from one section of the system to another with ease. Clicking on the menu icon brings up a list of options, and clicking on an option takes you directly to that section of ACHIEVE.

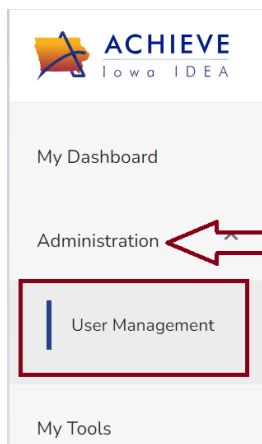
Items per page: 1 of 777 < >

Pagination

- Located at the bottom of the User Management page. The display is ‘Items per page’ (caret will allow you to change the items per page) and the number of pages (arrows to the right allow you to move back and forth between pages).

LEA User Manager Administration (User Management):

- **Click Administration/User Management** from the left navigation bar.



LEA User Managers should not:

- Add LEA staff to ACHIEVE if the user already exists in ACHIEVE.
- Add LEA staff solely to access the IFSP, IEP, or any other ACHIEVE tool outside of General Supervision roles. Contact the [ACHIEVE Data Lead](#) from your AEA for support if such access is required.

Before selecting the 'add new' button, search active/inactive users to verify the user does not already exist in ACHIEVE.

- **Search 'all' ACHIEVE users** (search all users to verify if the user already exists).
Search by: User First Name, Last Name, Email Address
***Ensure the user does not already exist in ACHIEVE **prior** to clicking the 'Add New' button.*
 - Filter results by LEA or Permissions
 - View inactive users by selecting **Show Inactive** - Displays inactive users that can be reactivated (if the user has moved to your location).

It is important to search 'all' users prior to adding a new user to ACHIEVE to avoid duplication of users and conflicting user accounts.

The screenshot shows the 'Users' search interface. It includes a search bar with the text 'lohman', a 'Select AEA(s)' dropdown, a 'Select Permission(s)' dropdown, and a 'Show Inactive' checkbox. The search bar, 'Select AEA(s)', and 'Show Inactive' are highlighted with colored boxes (red, blue, and green respectively).

Filter by: Permission(s) - to verify who has access to specific permission(s). This will be useful to confirm whether a user requesting access might already have access.

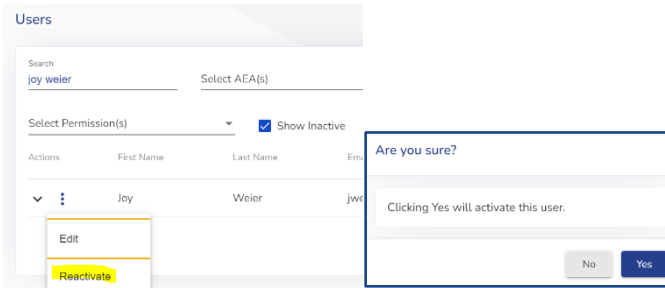
Sort: An arrow appears next to column headings in sortable tables when a mouse hovers over them. The up arrow indicates the column is sorted in ascending order while the down arrow indicates descending order. The User Management screen should be filtered prior to sorting to display results with fewer users.

The screenshot shows the 'Users' table with the following data:

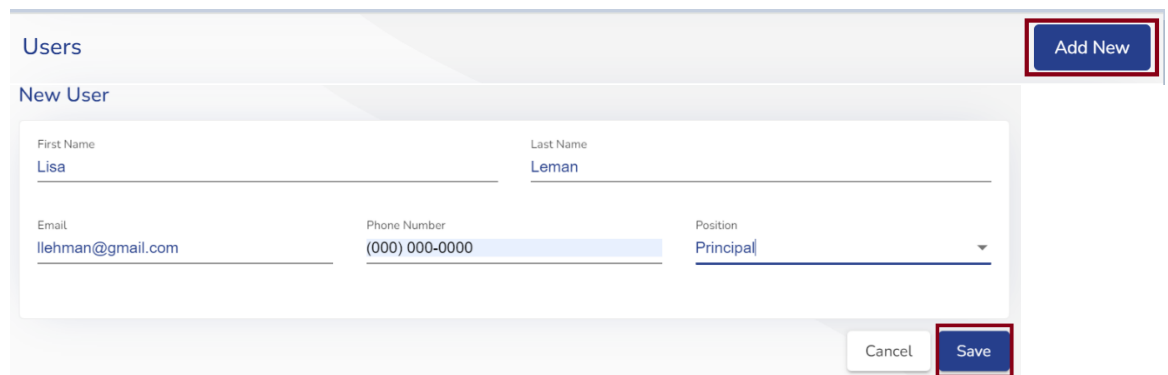
Actions	First Name	Last Name	Email	Position
⌵ ⋮	Matt	Lohmann	matt.lohmann@admschools.org	Assistant Principal
⌵ ⋮	Lisa	Lohman	lisa.lohman@iowa.gov	Consultant

If a user already has an active account in ACHIEVE, that record can be updated. If the user is inactive, the account must be reactivated by selecting the 'Quick Access Menu' to the left of the inactive user's name.

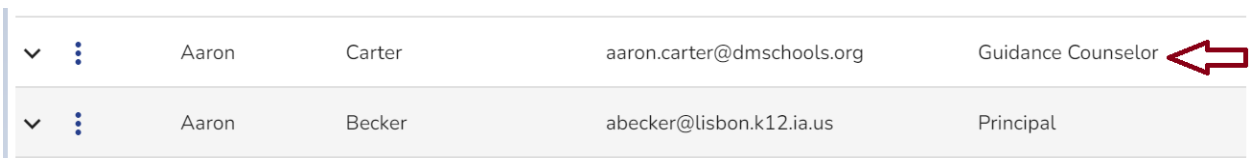
- Search for user
- Select the 'quick access menu' left of the user's name
- Select 'Reactivate'
- Are you sure? - select yes to reactivate



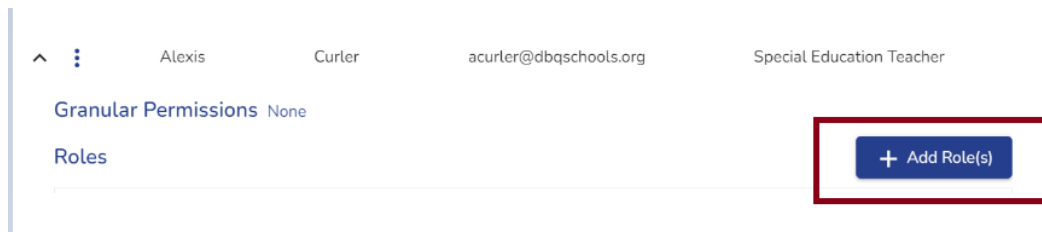
- **Add new users** (only if the user doesn't exist when searching active/inactive users).
 - **Enter the user's name, phone number, email address, and position.** (This information does not come over to ACHIEVE from Student Information Systems.)
 - After user information is entered select **'Save'**.
 - After Save button is selected, use **Search function** to locate the added user to assign permission(s) and location(s).



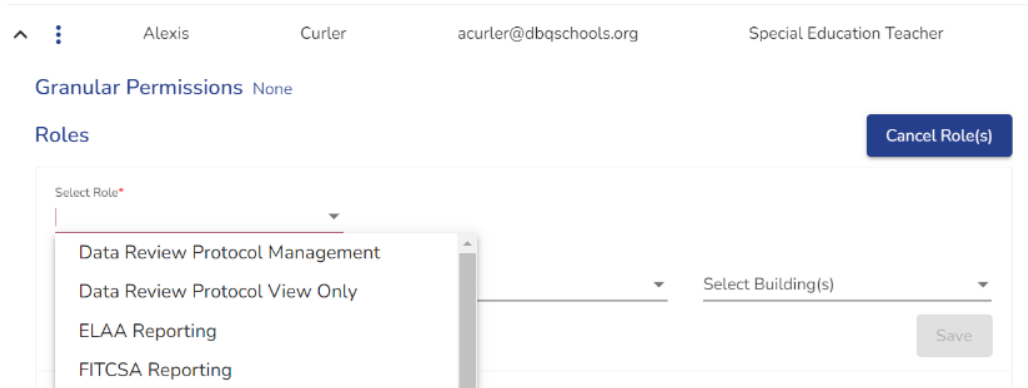
- **New users require access via [EdPortal \(step 1\)](#) and [SIS \(step 2\)](#) prior to establishing an ACHIEVE account.**
- After the LEA User Manager has located the user (utilizing the search function), click anywhere within the user's information to open the accordion.



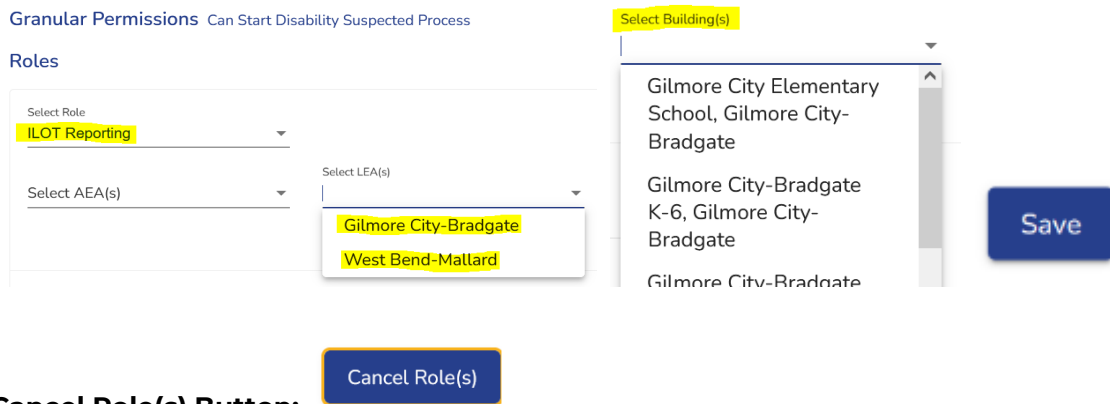
- Select **'Add Role(s)'**.



- Choose the General Supervision **role** to be assigned.



- Select the user's **location** (district and/or buildings); click 'save' to assign the role. **It is important that when adding role(s) that location(s) are included before saving the role, otherwise you will not be able to edit/delete that role. Note:** only the location(s) assigned to the LEA User Manager will be available to assign locations to users.

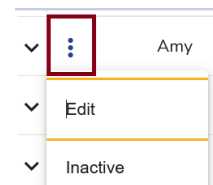


Cancel Role(s) Button:

- Allows cancellation of entered changes prior to saving.

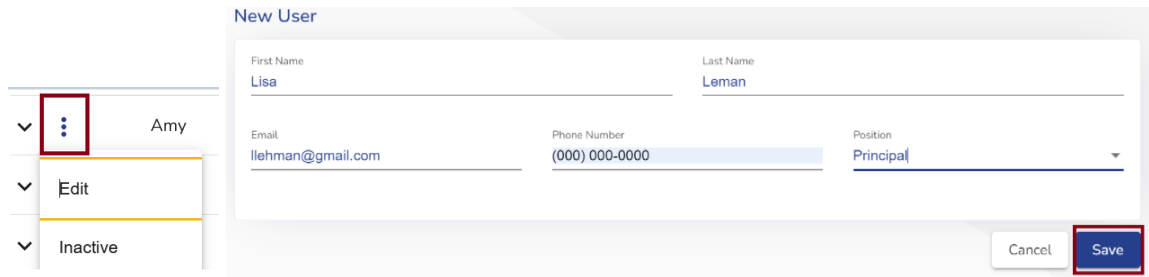
Quick Access Menu located to the left of the user's name:

- Allows for maintenance of existing user records.



Edit Existing Users:

- Allows an existing user record to be edited if the user has changed location, email address, name, phone number, or position.



Inactive:

- Allows the user record to be made inactive when a user leaves the agency or if the user was accidentally added. **Note: Do not inactivate a user with roles the LEA User Manager cannot edit.**

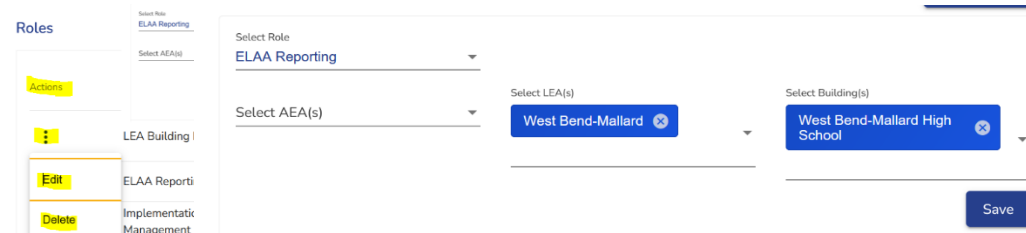
Reminder: Users no longer employed by the LEA User Manager's assigned location must be inactivated by the LEA User Manager in ACHIEVE. **Note:** *If a user moves into your location from another location in Iowa and you are updating that record, please work with the other agency's ACHIEVE Data Lead and/or LEA User Manager Primary Contact to ensure access from the previous location has been removed.*

Editing Assigned User Roles:

- LEA User Managers can only edit/delete **roles** (via the quick access menu) within their locational assignment. Quick access menus do not appear to the left of the role to edit/delete if the role location is outside the LEA User Manager's locational assignment.
- **Note:** When adding role(s), the location(s) must be added prior to saving the role, otherwise you will not have access to edit/delete that role.

User Role Quick Access Menu:

- Allows role(s) and locations within your locational assignment to be edited. The 'X' to the right of the LEA/building allows you to remove the LEA and/or Building.



Edit:

- Allows update of location(s) and change in role (if applicable).

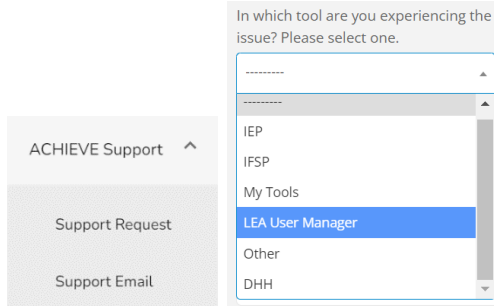
Delete:

- Allows assigned user role to be deleted.

Report Bugs:

[ACHIEVE Support Request](#) is located at the bottom of the left navigation menu. Choose the 'Support Request' option to include all required information and to ensure tickets are routed to the correct ACHIEVE Data Leads for support.

Note: Choose 'LEA User Manager' when submitting an ACHIEVE support request related to User Management/user roles addressed in this training.



Webinar - LEA User Manager Training:

The [LEA User Manager Training](#) was recorded on 8.8.24 and is available for viewing. Slide materials from this recorded training session are located on the [Iowa Department of Education website](#).