

## Create a new user account in Integris

These steps can only be undertaken by the school's Integris Administrator

Before you start, please note that you **cannot** create a user account for a staff member that has not been entered into Staff Details.

To check which user accounts are set up already, go to **System Management > User Management**.

To add a user account:

### Stage1: Select a member of staff

1. Go to **Modules > System Management > User Management** > Click on **Add User + icon** > Click on the Spyglass next to **Staff Member**

2. Search for the **surname** of the user in the usual way (i.e. enter surname > click Find ) so that the user details appear in the displayed fields

### Stage 2: Enter a User ID

3. Enter a unique user ID into the **User ID** field which the user will use as part of their login details.

We recommend that schools use the following format: **initial** and **surname**

followed by the school's four digit **DfE number** – all in upper case

E.g. Doris Day working at school with DfE no 823 1234 would have a user ID of

**DDAY1234**

Note: the UserID cannot contain spaces.

4. Staying on this screen select **Teacher** from the **User Desktop** pull down list.

5. In the password section, enter in Password123 and click the box for 'prompt for new password on login'

### Stage 3: Assign Roles

6. Now click on the **Roles** tab – decide which roles you need to assign (refer to the Roles table overleaf) – select each role and click on the > button to move the role to the right hand pane.

7. When complete click **Save**

The new user ID has now been created with the assigned roles.

### Stage 4: Check the access rights of the new user accounts created

8. Provide the teacher with their user login details (username and password) and ask them to login to Integris.

The new user will be prompted to change their password – it is recommended that passwords are a mixture of characters and letters.

**To enable the user to manage the resetting process of their password should they forget it in the future, ensure that the user's email address is entered into the staff record in Staff Details.**

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Suggested roles to assign to a Teacher user account:

Essential Roles	
Teacher - for viewing pupil records and entering attendance codes:	
Teacher	<i>this gives access to pupil records and Attendance for data entry via the teacher desktop</i>
STUDENT_PROFILE	<i>can view the student profile window to access basic details about the pupils</i>
Show My Locks	<i>enables the user to unlock themselves from any record lock</i>
StudDocStoreView	<i>enables user to view any documents linked to a pupil record</i>
Additional roles	
The following roles can be assigned depending on your use of Integris	
Assessment Assessment_Reports	<i>Access markbooks and run reports associated with assessment</i>
Behaviour	<i>Access the behaviour module for data entry</i>

Please refer to the additional 'Integris \_ Roles and Functions' document for full list of roles available and an explanation of each.

### Additional notes:

#### To edit an Existing User

If the teacher already has a user account for Integris, you may wish to **check/change the roles assigned to the user**. Go to **Modules > System Management > User Management**

Click on the User ID in the list – all the roles assigned will be listed in the bottom right box.

To **add a role**, simply click on the Add Roles icon.

To **remove a role**, you must click on **Edit** > select a role assigned in the right panel and click **Remove>>**. Click **Save** after you have finished.

#### To make a user inactive

If a teacher should no longer have access to Integris, then you can make the user account inactive but you cannot delete the user account

Go to **Modules > System Management > User Management** > click on the **Toggle Active** icon – answer **Yes** at the prompt.

See *LiteBite 1A – Managing User Accounts*