

Creating Activities for Special Education Caseworkers

This document will cover how to use the Activities module with Special Education Caseworkers. This process will allow the caseworkers to view all the profile information for student assigned to their activity.

Overview:

1. Create permission group for caseworks in Product Setup (must be a system wide user to perform this task)
2. Add Caseworks to the Permission group
3. Create Activity for each caseworker in the entity they service

1. Create a permission\security group for the caseworkers. **Note: This task can only be performed by a system wide user with permission to Product Setup.**

Go to: Product Setup



The screenshot shows the Skyward web interface. On the left, the navigation menu is open, highlighting 'Product Setup'. On the right, the 'Security Groups - SG' list is displayed, with 'Web Student Management - WS' selected and marked with a red star. The breadcrumb trail at the top right reads: Home > Skyward Contact Access > System Administration > Data Administration.

Select the 000 track. Security group MUST be created in the 000 track to work.



The screenshot shows the 'Web Student Management' filter dropdown menu. The selected option is 'Security Groups'. The filter criteria are '*000 - Cnty School District'.

If you haven't setup a group for Caseworkers select Add button to create a new group. You can name the permission group anything you would like. In this example the group name is going to be Caseworker. After naming the group click on Save.

Add Security Group

Security Group

System: Web Student Management

* Entity: 000 Algonac Cmty School District

* Group ID: Caseworker

* Group Description: Caseworker

* Grant Security To: Internal Users Internal and External Users ?

* Group Status: Active System Wide for the Entity

Highlight the name of or new group and click on the Edit Security Levels button.

| | | |
|-------|--------------|----------------------|
| ▶ 000 | Business dir | Business director |
| ▶ 000 | Caseworker | Caseworker |
| ▶ 000 | Caseworker A | Caseworker Activitiv |

[Edit Security Levels](#)

Select Web Applications, Educator Access Plus, Teacher Access, and then I My activities

WS - Web Student Management

WA - *Web Applications

Sort Show

WSIWA - Menu Items

- WA - Web Applications
 - EP - Educator Access Plus
 - TA - Teacher Access
 - MG - My Gradebook
 - MS - My Students
 - MC - My Classes
 - DA - Post Daily Attendance
 - MH - My Homeroom
 - MA - My Activities
 - ML - My Lesson Scheduler

Give security level 2-1 if you want them to be able to change data or 1-1 for view only rights

Add staff member to the 000 security group.

Go into the desired entity go to Office, Activities

Create Activity for each caseworker, assign staff to the activity, assign students to activity.

Go back to Secured Users and test account by doing a web login.