

Infinite Campus New IEP Viewer Add-On From Custom Task Documentation

The District currently has the standard IEP Viewer application which allows Infinite Campus users to view Frontline documents by clicking on a link within a custom “Documents” tab.

The District is requesting that Custom Data Services build upon the existing functionality and add the following components:

- 1. An Audit Access Log
- 2. Display of IEP Viewer link from the Campus Parent Portal

Districts will need to provide the Frontline Org ID from Frontline.

The IEW Viewer application includes the ability for users to view an “Audit Log” which shall contain a list of all users that have checked the URL to view the Frontline document for a given student.

- 1. The log shall be student specific and reside in Student Information > General
- 2. The tab shall be called “Document Audit Log”(unless otherwise noted by the District to be named something else).

A Custom Tab will be made and added to the district site as shown below:

Custom Tool Setup ☆

System Settings > Custom Data and Links > Custom Tool Setup

The Custom Tool Editor allows users to create custom data objects for tracking local or state-level information as well as custom shortcut links which can be added to the main menu.

Document Audit Log

Student Information > General

Table Editor

Edit Custom Tool Setup

Tool Type

Table Editor

Search Option

Student

Tool Name (Required)

Document Audit Log

Publish to Portal

☐

Menu Placements

Student Information > General

Create New Menu Placement

Summary ☆

Student Information > General > Summary

Student #: Grade: DOB:

Related Tools

Person Information

Quick Contacts

Document

Document Audit Log

3. NOTE: The tracking of users who have clicked the link is not necessarily indicative that there was indeed a document to view when the user clicked it.

The IEP Viewer application also includes the ability to display this same URL on the Campus Parent Portal, if so desired by the District

1. When enabled via the Portal Display Options, the new link shall be available in Campus Parent > More > Document

> an outline link called "IEP and/or 504 Document" District to confirm desired URL name

2. The to-be process shall determine who to expose the documents to based on the Relationship configuration:

a. The relationship record must be active

i. Meaning the "Start Date" is null or $\leq$ the current date AND

ii. The "End Date" is null or $\geq$ the current date

b. The "Guardian" and "Portal" checkboxes must be checked on (Path: Census > People > Relationships > "Start Date", "End Date", "Guardian", "Portal").

The screenshot shows a configuration window with several columns: Emergency, Priority, Guardian, Mailing, Portal, and Private. The 'Guardian' and 'Portal' columns have checkboxes that are checked (indicated by blue checkmarks). The 'Emergency' column has a dropdown menu with '2' selected. The 'Priority' column has a dropdown menu with '1' selected. The 'Mailing' column has a checkbox that is checked. The 'Private' column has a checkbox that is unchecked. The 'Guardian' and 'Portal' checkboxes are highlighted with red boxes.

3. The documents shall not be accessible for the students unless they are considered to be their own Guardians, as configured in Infinite Campus

4. Because of the inherent nature of this functionality, a link for the document will display even if there is no document on the Frontline side. In an attempt to reduce confusion or questions, the following disclaimer shall display: "The presence of a link is not necessarily indicative of whether or not your student has an IEP or 504 document. If an active document for your student exists, it will display upon clicking the link. Otherwise, you will see a message that one does not exist."

5. Due to the sensitive nature of the documents themselves, the District will assume liability for the Parent/Guardian contacts who access these documents and how they could be potentially stored, printed, or distributed and the liability is assumed once the District turns the display option on within Infinite Campus

a. This shall be provided to the district as disabled by default. It is up to the district to enable it on the Portal Display Options when they are ready to turn it on.

The district will need to contact the ESBOCES Special Education help desk (spedhelp@esboces.org) 631-844-5720 and let them know when Custom Computer has completed the setup for the Parent Portal on the Infinite Campus side.

Two people in the District's Special Education office should be identified as the people who will be managing the Parent Portal on the IEP Direct side.

Please provide their names and contact information to the Special Education help desk/.

Typically, this will be the Special Education Director and the Senior Clerical. Those users will potentially assign access to other office staff.

After the Custom Tab is created, the district will be able to create an Ad Hoc filter to generate a report:

Filter Designer ☆

Ad Hoc Query Wizard - Field Selection

Select fields to use for creating a filter for which logic and output formatting may be applied. Click a field within the All Fields window, or use the Add Function option to add the sequence the fields in the order selected; however, the sequence can be changed on the Output Formatting screen. At least one field must be selected to continue.

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

*Query Name: Copy of IEP Viewer Audit Log

Short Description:

Long Description:

Select categories & fields

Filter By Search Clear

All Fields

Custom Tab: Clubs and Activities

Custom Tab: Computer Device

Custom Tab: Course Request

Custom Tab: Custom GPA

Custom Tab: DataViz Homepage Setup

Custom Tab: Document Audit Log

Document Audit Log_statusDate

Document Audit Log_statusDistrictName

IEPackName

IEPackPersonID

IEPackUsername

Selected Fields

student.studentNumber

student.lastName

student.firstName

student.grade

CustomStudent_Document Audit Log.Document Audit Log_statusDate

CustomStudent_Document Audit Log.Document Audit Log_statusDistrictName

CustomStudent_Document Audit Log.IEPackName

CustomStudent_Document Audit Log.IEPackPersonID

CustomStudent_Document Audit Log.IEPackUsername

Filter Designer ☆

Ad Hoc Query Wizard - Filter Parameters

Parameters are used to filter data based on specific logic. Use the operators to apply logic to designated fields. Logic may be applied even if a field is not being output. Click conditions for the operators using AND, OR, and NOT conditions. If a Logical Expression is not used, the condition AND will be applied to all operators. If using Logical Ex

[Field Selection](#) > [Filter Parameters](#) > [Output Formatting](#) > [Grouping and Aggregation](#)

*Query Name: Copy of IEP Viewer Audit Log

Short Description:

Long Description:

Filter the data

ID	*Field	Operator	Value
1	student.studentNumber		
2	student.lastName		
3	student.firstName		
4	student.grade		
5	CustomStudent_Document Audit Log.Document Audit Log_statusDate		
6	CustomStudent_Document Audit Log.Document Audit Log_statusDistrictName		
7	CustomStudent_Document Audit Log.IEPackName		
8	CustomStudent_Document Audit Log.IEPackPersonID	IS NOT NULL	
9	CustomStudent_Document Audit Log.IEPackUsername		

Export to Excel

Export to PDF

Drag a column header and drop it here to group by that column

student.studentNumber	student.lastName	student.firstName	student.grade	CustomStudent_Docume	CustomStudent_Docume	CustomStudent_Docume	CustomStudent_Docume	CustomStudent_Docume
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