

BRIGHT ACCOUNT CONFIGURATION

1. LOAD THE STAFF SNAPSHOT TO LEVEL 0

- It is not necessary to do this every time. As long as the user has not been added since the last time the Staff Snapshot was uploaded to L0, this step is complete.

2. CREATE THE USER IN MINDEX

If the user already exists (e.g. for SchoolTool users), proceed to the following section.

1. Navigate to **Faculty > Faculty List** and click the **+ Add** button

2. Type in the **last name** of the new user and click **Search**

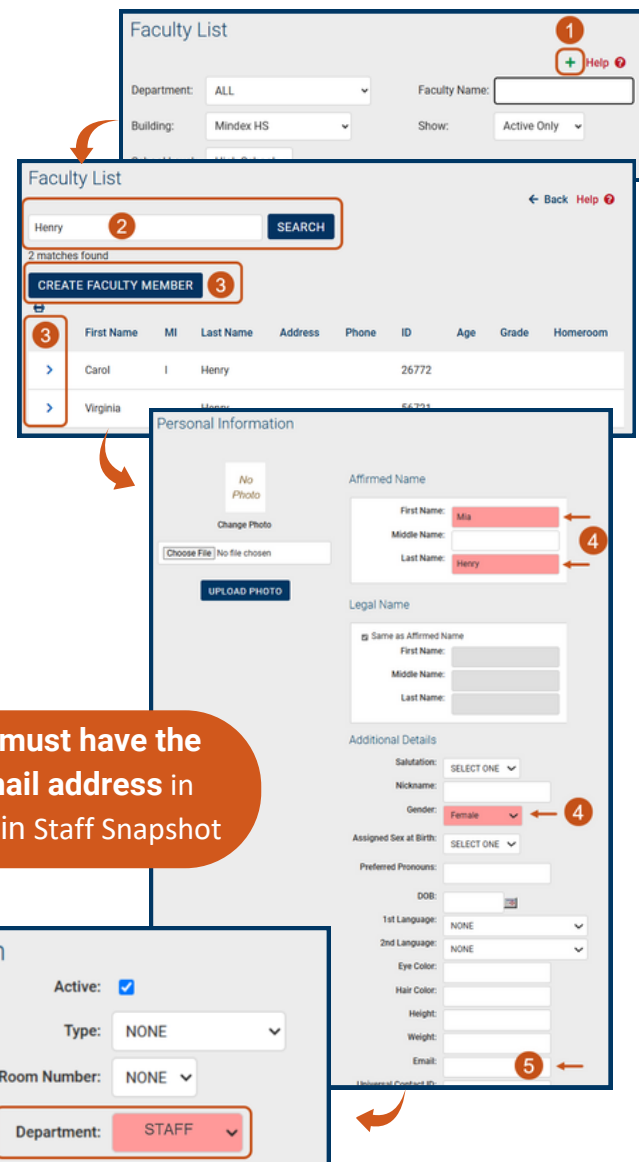
3. **Select the desired faculty member** if already in Mindex OR Click **Create Faculty Member** if they do not already exist

4. Fill out all the **red, required fields**

5. Add the **same email address** in the email field as used in Staff Snapshot.

6. Check the box for **High School**

7. Choose **"Staff"** in the department drop-down

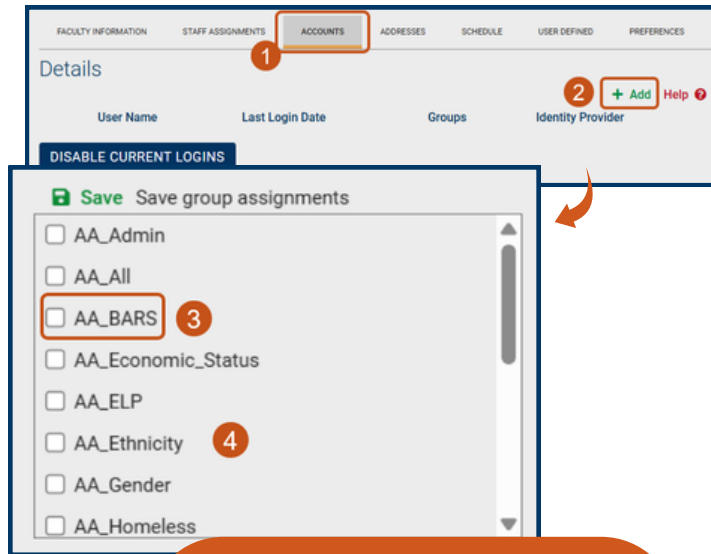


The screenshots show the Mindex interface for creating a faculty member. The top screenshot shows the 'Faculty List' page with a search bar and a '+ Add' button (1). The middle screenshot shows the search results for 'Henry' (2) and the 'CREATE FACULTY MEMBER' button (3). The bottom screenshot shows the 'Personal Information' form with various fields. Red boxes highlight required fields: First Name, Middle Name, Last Name (4); Gender (5); and Main Campus (High School) (6). The Department dropdown is set to 'STAFF' (7). An orange callout box states: 'The user must have the same email address in Mindex as in Staff Snapshot'.

BOCES users must have a super user account in **every** district they want access to.

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3. ASSIGN SECURITY GROUPS



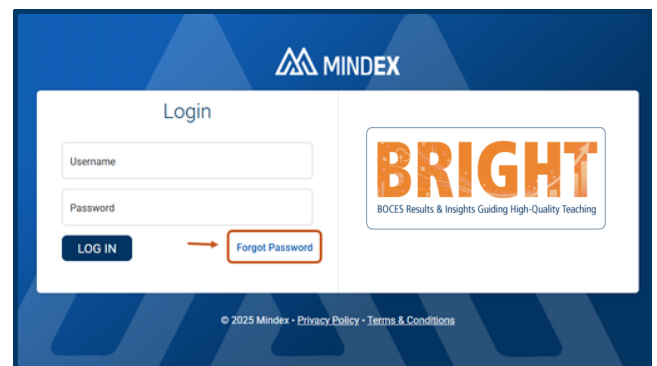
AA_BARS & AA_User are the **minimum prerequisites** to allow the user to see the BRIGHT dashboards.

1. In **Faculty > Faculty List**, click the **Accounts** tab
2. Click the **+ Add** button
3. Select the **AA_BARS** and **AA_User** group assignments
4. **Principals** and other building-level users must have the security group **AA_User_Full_Building**
5. **Superintendents** and other district level users must have the security group **AA_User_Full_District**
6. If desired, add:
 - AA_All
 - AA_Economic_Status
 - AA_Race
 - AA_Special_Education
 - AA_Gender

Note: AA_All covers all the other permissions. You don't need to select all of them if you select AA_All

4. USER LOGIN & WAIT UNTIL NEXT DAY

1. Have the user click the **district-specific URL**
2. Click **"Forgot Password"**
 - a. The user will receive a **password via e-mail**
3. **Login** with the password
 - a. If you receive an **error message**, **refresh the page**. You may need to wait up to 5 minutes before seeing dashboards

4. **Wait 24 hours**
 - a. RLS is **refreshed nightly** therefore users will not have proper RLS security on the same day they are created, nor will they see any data on the day they log in for the first time

For assistance, please contact BRIGHThelp@esboces.org.