

End User Guide
Bulk Synchronisation for Staff Accounts



TrackOne
S T U D I O

If you require further expansion or assistance at any point in the document, please do not hesitate to contact TrackOne Studio Support through the Help Desk by sending an email to helpdesk@trackonestudio.com.

Bulk Synchronisation

The screenshot shows the TrackOne Studio Administration interface. On the left, a navigation menu is visible with 'Administration' at the top, followed by 'User Management' and 'Users'. The main content area shows a 'Staff' menu with 'Active Users' selected. A table of active users is displayed with columns for User Name, SIS Code, Family Name, Given Names, Email, Roles, Approved, Override User Synchronisation - Keep User, Locked Out, and Override Network Authentication. A 'Bulk User Synchronise' button is located at the bottom right of the table.

User Name	SIS Code	Family Name	Given Names	Email	Roles	Approved	Override User Synchronisation - Keep User	Locked Out	Override Network Authentication
buddp	ANI	Budd	Phillip	phillip.budd@trackonestudio.com	TEACHER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	False	True
phillip.budd@trackonestudio.com	PBD	Budd	Phillip	phillip.budd@trackonestudio.com	TEACHER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	False	False
oxleyj	OXL	Oxley	John	john.oxley@trackonestudio.com	Senior Leadership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	False	True
SmithS	SMI	Smith	Sophie	sophie.smith@trackonestudio.com	Administrator_L1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	False	False
Demo	ABC	TrackOne	Demo	info@trackonestudio.com	TEACHER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	False	True

Note: All user accounts are synced based on the SIS code and not the User Name.

Buttons: Bulk User Synchronise, Add New User

1. Select **Administration** from the top of the left-hand task panel.
2. Select **User Management**, followed by **Users**.
3. Click **Staff** on the blue horizontal menu bar.
4. Click **Bulk User Synchronise**. The following page will load.

Synchronise staff accounts from Student Information System

Select username creation method:

Note: An account will not be created for users where the selected username field is empty.

Prepend text to username (if required):

Postpend text to username (if required):

Select default password creation method (for new users): Note: While a password will be created for all users, this password will not be used when LDAP/SSO authentication is enabled.

Auto generate random password
 Enter default password for all users

Check the 'Override existing account details' option below to overwrite the details of existing users with those in your Student Information System. This process will use the SIS Code (Teacher, Parent, Student Code) as the key and can therefore be used to update usernames based on the selected sync option. Note: If you have set options to mark users as inactive in your SIS, this option will also archive those user accounts.

Override existing account details

Select User Role(s)

Please note, a new role will only be set for a user when a role for this user has NOT already been explicitly assigned in your SIS.

Menu Options
<input type="checkbox"/> Teacher Security
<input type="checkbox"/> Student Portal
<input type="checkbox"/> Access for SLT, ELT, CLT
<input type="checkbox"/> Parent
<input type="checkbox"/> Administrator Level One
<input type="checkbox"/> Administrator Security

Buttons: Return to User Management, Synchronise Users

Synchronise staff accounts from Student Information System

Select username creation method:

Teacher code

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Note: An account will not be created for users where the selected username is empty.

Prepend text to username (if required):

Postpend text to username (if required):

Select default password creation method (for all users): Note: While a password will be created for all users, this password will not be used when LDAP/SSO authentication is enabled.

Auto generate random password

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Enter default password for all users

Check the 'Overwrite existing account details' option below to overwrite the details of existing users with those in your Student Information System. This process will use the SIS Code (Teacher, Parent, Student Code) as the key and can therefore be used to update usernames based on the selected sync option. Note: If you have set options to mark users as inactive in your SIS, this option will also archive those user accounts.

Overwrite existing account details:

Select User Role(s)

Please note, a new role will only be set for a user when a role for this user has NOT already been explicitly assigned in your SIS.

	Menu Options
<input type="checkbox"/>	Teacher Security
<input type="checkbox"/>	Student Portal
<input type="checkbox"/>	Access for SLT, ELT, CLT
<input type="checkbox"/>	Parent
<input type="checkbox"/>	Administrator Level One
<input type="checkbox"/>	Administrator Security

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[Return to User Management](#)

[Synchronise Users](#)

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1. Select the username creation method. There are numerous methods for creating the usernames.

Note: Please use the same username method that is used as the login for the school network. If staff login to the network via the username format **ASmith**, this is what should be selected from the drop-down. If unsure of which method to select, please contact TrackOne Studio before proceeding.

2. If LDAP authentication is enabled, select **Auto generate random password**. The application will ignore the passwords that are generated, meaning staff will be able to login via the same password they use to access the school network.
3. It is recommended that the staff members be assigned the lowest level of access (**Teacher Security**). When the sync is complete, the role of each individual staff member may be edited to assign a higher level of access where needed.
4. Finish by clicking **Synchronise Users**.