

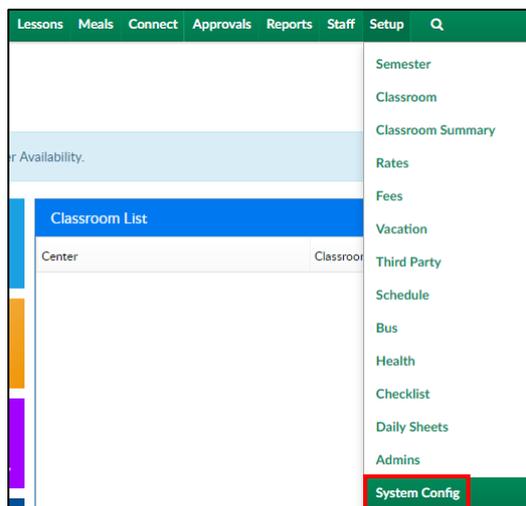
System Config > Connect Portal, Create Connect Portal User Names

Last Modified on 12/11/2019 12:51 pm EST

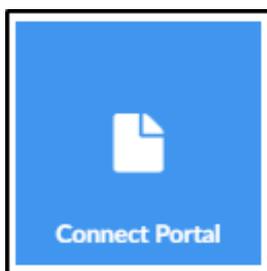
Selecting this option will create user names for guardians that do not currently have one created. The user name is generated based on the User Name Format field.

Please Note: User names in the system prior to this batch job will not be updated to selected format and disabled user names will not be enabled.

1. Click Setup from the menu, then select System Config



2. Click the Connect Portal tile



3. Click Actions
4. Select Create Connect Portal User Names
5. Complete the popup as necessary

Connect Portal User Name Creation - Batch Job Submission

Company: --

Send email to parents?: No

Automatically append sequence number to prevent duplicate user names?: Yes

Email address to notify when job is finished (use comma to separate multiple addresses):

User Name Format

User Name Format: [f].[l].[pid]

Available Format Tokens: --

Format Delimiter: -

Buttons: Cancel, Clear User Name Format, Submit Job

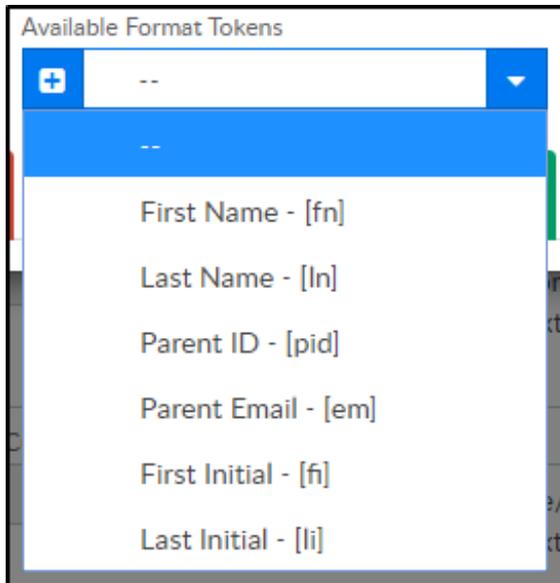
- Company - choose the business level or a center to apply the settings to
- Send email to parents?
 - Yes - send a confirmation email to parents containing the user name
 - No - do not send an email to parents with the user name
- Automatically append sequence number to prevent duplicate user names?
 - Yes - if there is a duplicate user name in the system, it will automatically add a number to the end of the user name (the system will start at 1 and go up in order from there. Example: if s.johnson is already in use, the system will create s.johnson.1)
 - No - if there is a duplicate user name in the system, a user name will not be created
- Email address to notify when job is finished (use comma to separate multiple addresses) - enter an email address of an admin to receive a confirmation when batch job is completed
- User Name Format - displays the current user name format. To create a new format, click Clear User Name Format



User Name Format

[fi].[ln].[pid]

- Available Format Tokens - use the drop-down to select the formatting option(s)



Available Format Tokens

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- First Name - [fn]
- Last Name - [ln]
- Parent ID - [pid]
- Parent Email - [em]
- First Initial - [fi]
- Last Initial - [li]

- Format Delimiter - this field is what separates the format tokens. For example: use a period to separate first name and last name - steve.johnson

6. Click one of the following

- Cancel - click this option to exit the popup
- Clear User Name Format - this option clears out the User Name Format field
- Submit Job - use this option to complete the job and have the user names created

Example

To create user name J.Doe (first initial.last name), follow below

1. Select Clear User Name Format
2. Click Available Format Tokens drop-down and select First Initial - [fi]

Available Format Tokens

	First Initial - [fi]	
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- Put a period in the Format Delimiter field (this is used to separate the format tokens)

Format Delimiter

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- Choose Last Name - [ln] in the Available Format Token drop-down

Available Format Tokens

	Last Name - [ln]	
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- Ensure the User Name Format field is correct

User Name Format

	[fi].[ln]
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