2Simple

Manage Users

Introduction

Setting up users is a really important step to getting the best use out of your software.

The **Manage Users** tool allows you to add and manage users quickly and easily using either an

MIS update, an Import wizard or manual additions and edits.

The front screen of Manage users has a visual guide to possible setup problems. These are

indicated with the eye symbol and link to the user management areas that need attention.

Use the links below to help you get your users correctly set up:

- ❷ [Setting up and updating users directly from your Management Information System (MIS)](#)

- ❷ [Setting up Pupils using the wizard or manually](#)

- ❷ [Setting up Staff using the wizard or manually](#)

- ❷ [Setting up Parents using the wizard or manually](#)

- ❷ [Setting up Classes using the wizard or manually](#)

- ❷ [Setting up Groups using the wizard or manually](#)
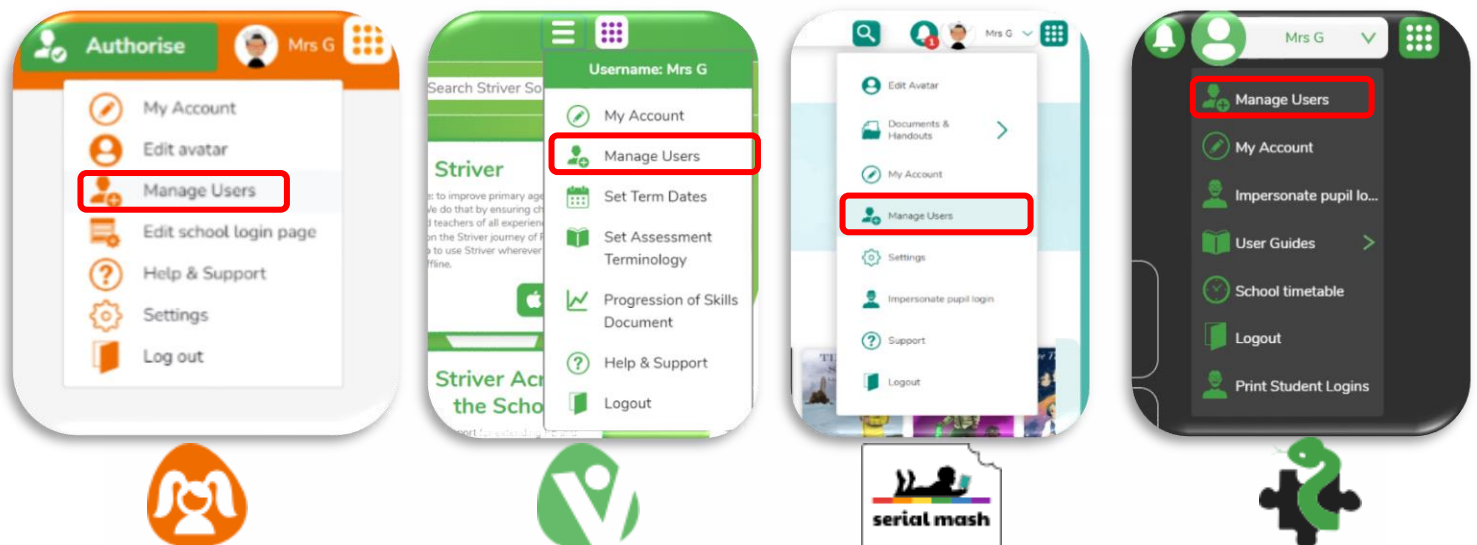
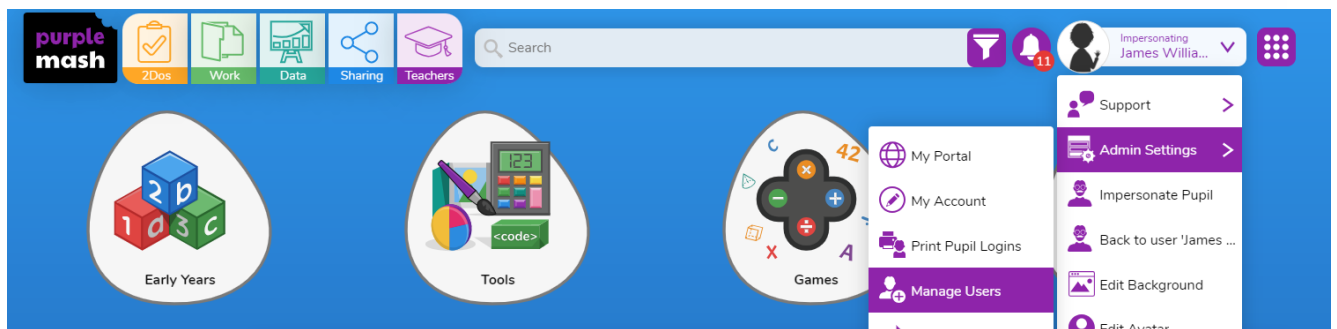- ❷ [Impersonating a different user](#)

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Using a MIS to setup or update users

Whether you are a new customer looking to create accounts for the first time, or an existing user looking to create accounts for your new intake and rollover the current pupils into their new classes. Then the easiest way to do this is via the **MIS Sync Wizard**. We have partnered with two cloud-based data management services: Wonde and Groupcall.

1. Log into your 2Simple product and head to 'Manage Users' from the admin settings area.

2. Once in 'Manage Users', you will see an Import/Sync option in the toolbar. Click on this and select "MIS sync wizard". The first time that you do this process you will be presented with dialogue which will allow you to select **Wonde** or **Groupcall Xporter**.
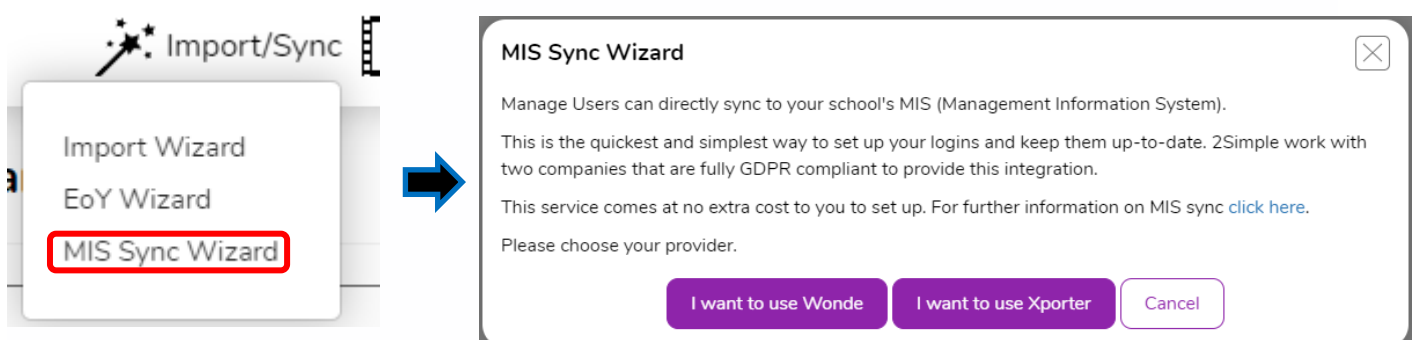
Setting up Wonde MIS Sync

You must be an admin for your school to set up Wonde MIS Sync.

This only needs to be done once but you cannot run the MIS sync wizard without first setting up Wonde MIS Sync and authorising the relevant data to be shared with 2Simple.

1. Select '**I want to use Wonde**'. This will open the following Screen:
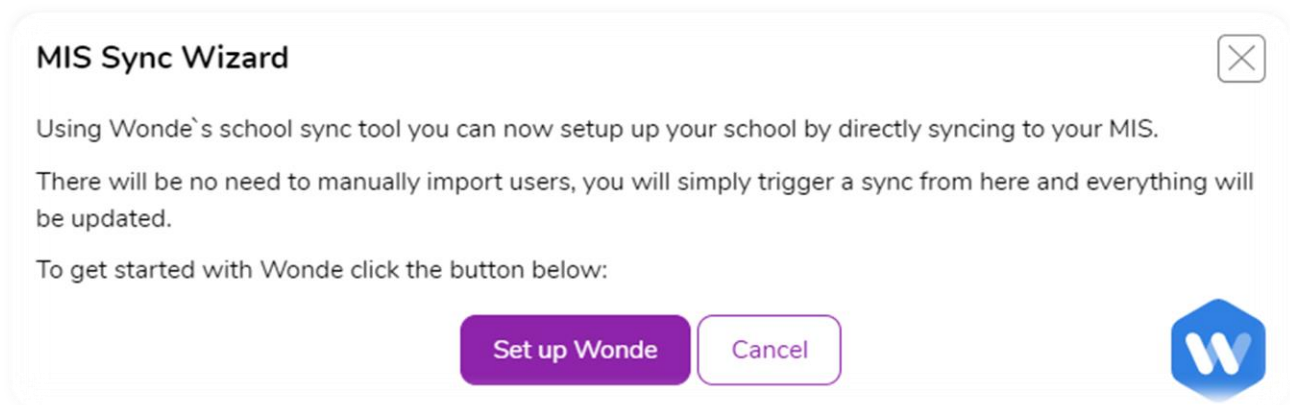
2. Select '**Set up Wonde**' this will then present you with a message informing you that the request has been sent. The 2Simple Support team will then be in touch to get you set up.
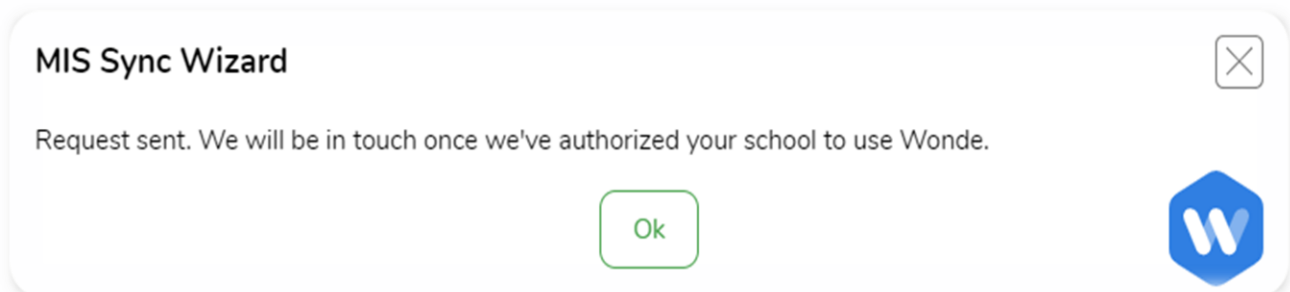

3. You will then receive an email from the 2Simple support team informing you that you have been invited to use Wonde.

4. Once you have received your email you can access your Wonde portal by going to **edu.wonde.com/login**.

   Important: If you are not yet a Wonde admin or your school does not yet have Wonde installed, please contact the Wonde support team on **support@wonde.com** or 01638 779144, they can then send you an admin invite to access your portal.

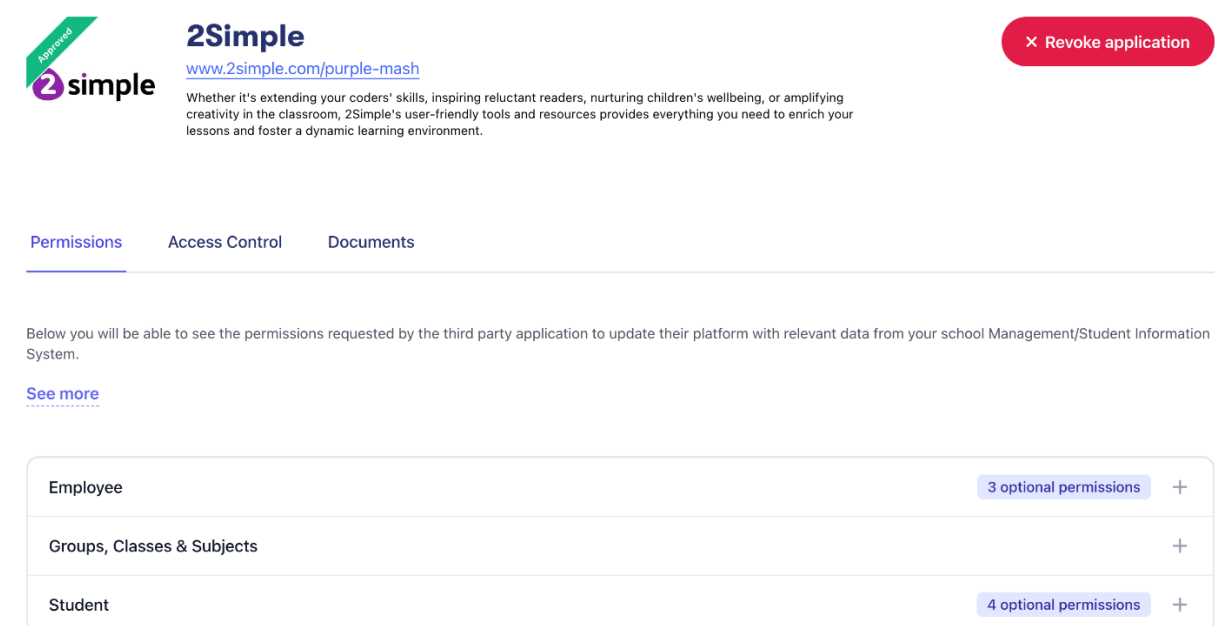**5.** Once you have signed into your Wonde portal you will then need to grant permission for Data Sharing with 2Simple.
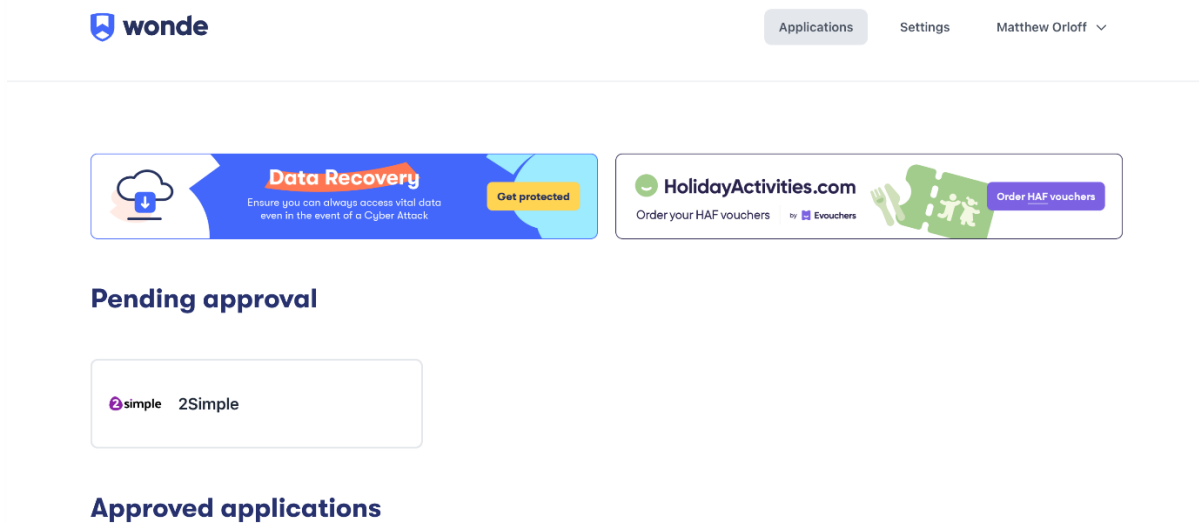
6. **Click** on the **2Simple** tile. This will take you to the **application management** page.

7. **Click** on **Permissions.** This will show you a list of the Data Scopes we need in order to update your staff and children.

You might find some of these permissions set are optional. This means you have the ability to toggle these on or off, on if you would like to share this information with 2Simple and off, if not.

8. Once reviewed, click on **Approve Access** on the top right-hand side to share the relevant Data Scopes with us.
   If your school does not yet have Wonde installed, you will now be prompted to select the MIS your school uses. If required, a link will appear for you to book a telephone appointment with a member of Wonde's tech team to install Wonde. If a telephone appointment is not required, a guide will talk you through the required steps.

9. Once complete, you can then run the MIS Sync Wizard in order to update your 2Simple users.

Setting up Groupcall Xporter MIS Sync

You must be an admin for your school to set up Groupcall Xporter MIS Sync.
This only needs to be done once but we cannot run the MIS sync wizard without first setting up
Groupcall XoD and authorising the relevant data to be shared with 2Simple.

1. Select **'I want to use Groupcall XoD'.** This will open the following Screen:

Note - Groupcall Xporter requires the following data (**Because these are required these are not included in the screen above):**

- ❷ **SCHOOLLITE**: Access to structural school information such as groups & headteacher contact details. **Allows 2Simple to assign staff and students to the correct classes**.
- ❷ **STAFFLITE:** Access to basic staff details (names & work contact details). **2Simple product Staff accounts require a first name, last name and email address.**
- ❷ **STUDENTLITE:** Access to basic student details (names, gender). **2Simple products pupil accounts require a first name and last name.**

There is optional data that you can allow Groupcall Xporter to access:

- ❷ **UPN**: **(STRONGLY RECOMMENDED)** Access to student UPN and former UPN data. **This is the unique identifier for all pupil accounts, not including UPN can result in duplicates.**
- ❷ **STUDENTEXTENDED**: Access to extended student information (Additional identifiers, extended name data) e.g. **Date of Birth so 2Simple can wish a happy birthday.**
- ❷ **STAFFPERSONALCONTACT**: Access to staff home contact details. **An email address is required for staff accounts. If no work email address is stored in your MIS you may wish to use their personal email address. (**Please note: a work email will always be used if available, even if sharing this data scope.)

2. Confirm you have chosen the data you wish 2Simple to extract and click **"Set up Xporter"**. This will generate an email to you from Groupcall asking you to consent the data share. Follow the instructions on this email carefully and be sure to enter the details of the person with authority to share data, if this is not you.

   If this is the first time setting up Groupcall Xod, you will be asked to book a time to install the software at the end of the authorisation process. Please follow the instructions to book a time with Groupcall to do this. If you are already using Groupcall XoD with another app in your school, you will be able to go straight back to the 2Simple product and complete the MIS sync wizard.

3. Once authorised and installed, you're now ready for the MIS sync wizard and won't have to repeat any of the above steps again.

Running the MIS sync wizard

1. Log into your 2Simple Product go to the admin drop down, contained within the profile drop down and head to Manage Users. Click on Import/Sync and select "MIS Sync Wizard".
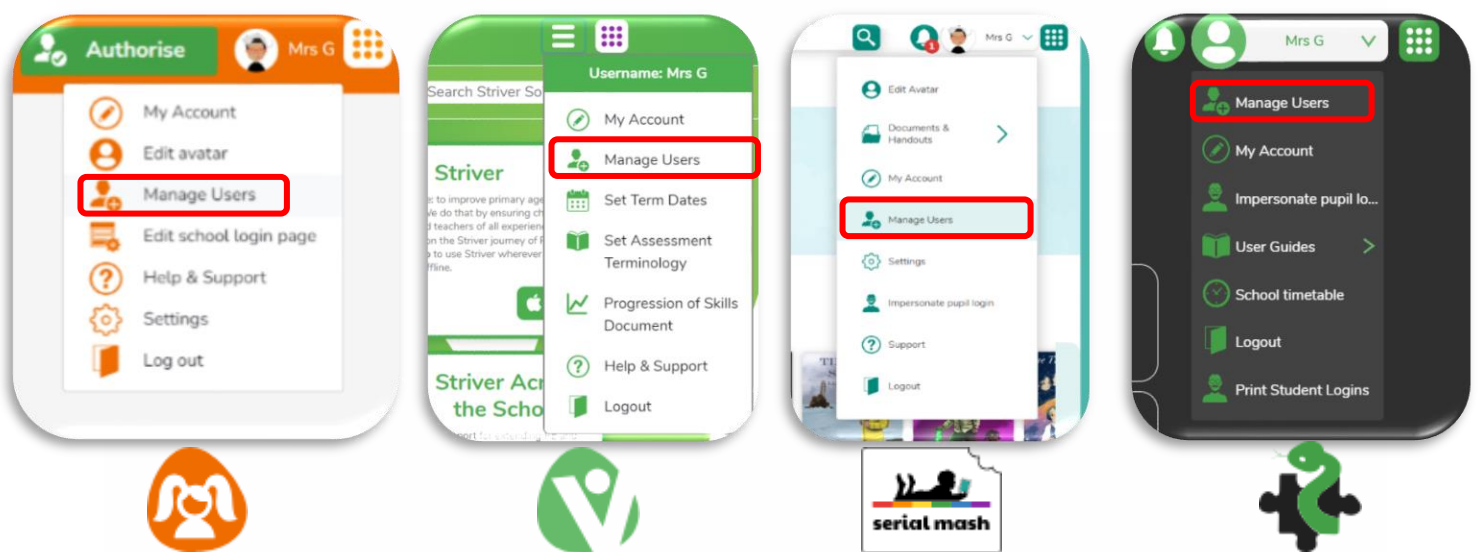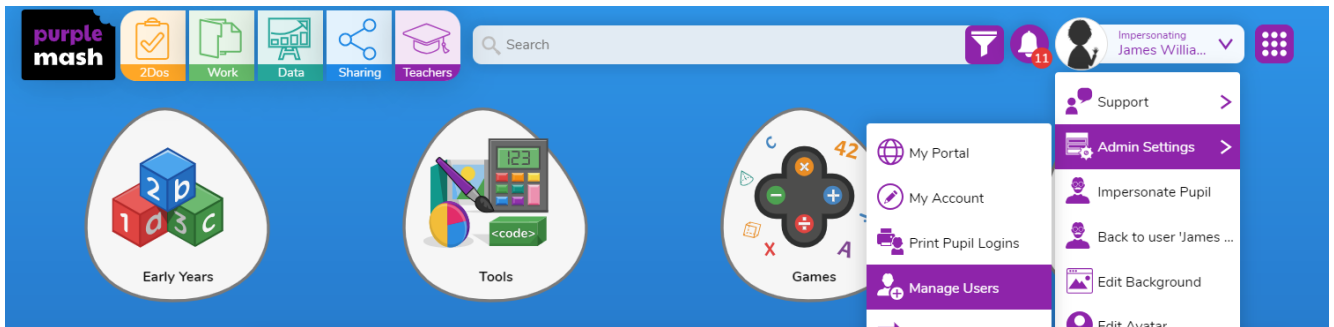
2. This time you will see step 1 of the wizard, asking you to choose the log in format of your pupils and staff.

We recommend setting up pupils in the format "forename + surname initial" (e.g. John Smith would have the username JohnS) as children tend to learn their first name before their last name, but you can choose whatever you wish.

For staff, we would recommend "sync only teachers" as generally speaking all staff do not require an account (and its easier to manually add the odd staff member who does later, than it is to remove all the staff who do not need an account). We recommend setting staff usernames to the format "forename initial + surname" (e.g. John Smith would have the username JSmith).

3. Click '**next**' to move onto step 2 which is selecting the password formats. You can select by year group as a text-typed password may not suitable for your EYFS pupils but perfectly suitable for your KS2 children.


Note: If you already have some users set up in in your 2Simple product, the settings chosen in the first 2 steps of the wizard will only apply to new users being created and therefore the existing users will be able to use the same login details as before.

4. Again, click **'next'** to move onto the next step- mapping year groups. This step only needs doing once but is very important. Depending on what MIS you use, you may have a different naming format for each year group. For example, "Year 6" could be known in your MIS as "Y6", "Year Six", "6", "Yr6" etc but 2Simple will only recognize "Year 6". Therefore, simply map your year groups to the 2Simple format.
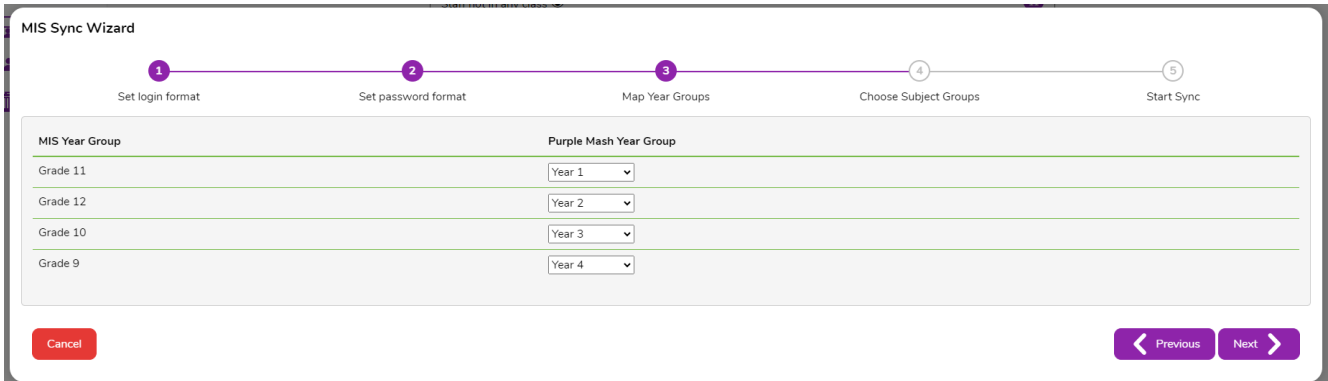
5. The final step is optional, simply click next again if not applicable to your school but you do have the option to import subject groups.
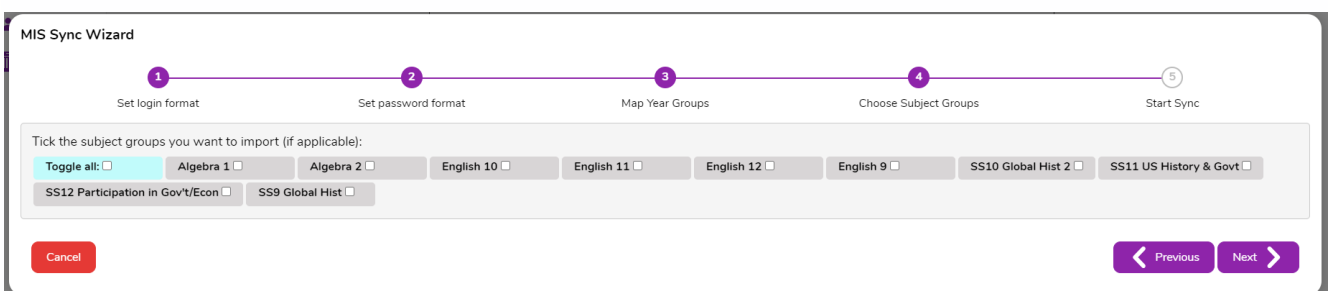
6. Once you have clicked **'next'** you will be shown a summary of the information you are importing. Check this is what you were expecting to see and click **'finish'** to create the user accounts. Any new staff accounts will be sent an activation email and you will be able to print out login cards for the pupils.
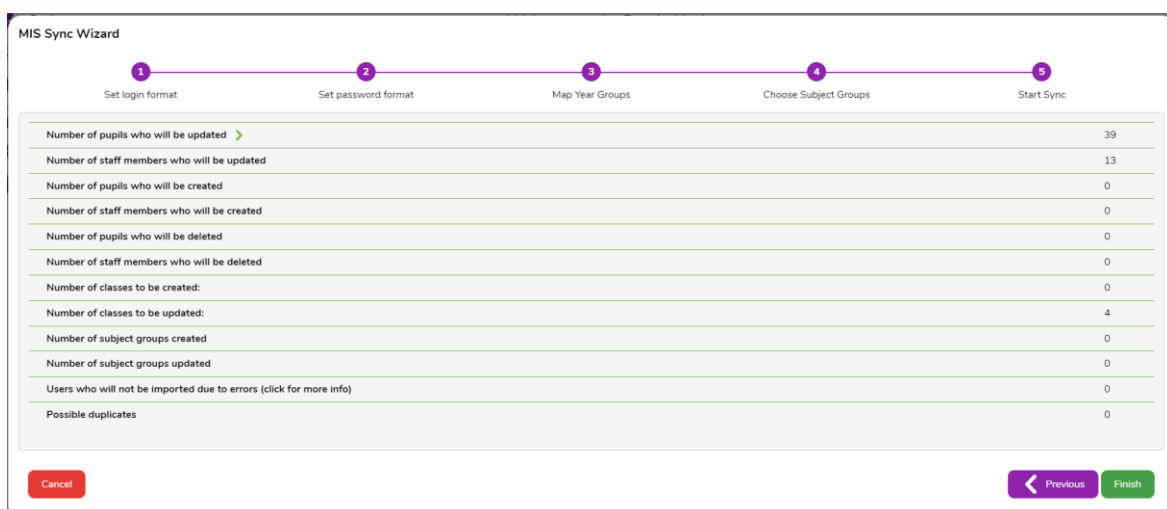
Pupils

Here you will find all the information you will need to set up your pupils.

🅭 [How to use the Import Wizard to add and edit pupils](#)

🅭 [How to manually add pupils](#)

🅭 [How to manually edit pupils](#)

🅭 [How to delete pupils](#)

🅭 [How to restore a deleted pupil](#)

🅭 [How to create login cards, parent letters and export pupil data](#)

🅭 [How to mass generate new passwords for existing pupils](#)

How to use the Import Wizard to add and edit pupils

1. The Import Wizard can mass-create users in Manage Users using data from a spreadsheet.

   Firstly, create a spreadsheet with three headers: '**Full Name**, **Class** and **UPN**'.

   Note: Striver users should ensure 'Gender' header is added too.

   Ensure these columns are filled for each pupil. If you do not have access to the UPN (unique pupil

   number) you can use any other unique identifier for example abc1, abc2, abc3. We can mass-

   generate usernames and passwords for you at a later step. However, if you wish to set them up

   yourself for example, to match other usernames and passwords that pupils use, you can add

   columns with the headers **'username'** or **'password'**.

	A	B	C
1	Full Name	Class	UPN
2	Lily Lloyd	4A	ff64f96f4f6
3	John Smith	4A	ff54f86f5f7

   Download an example spreadsheet here

2. Click on **'Import/Sync'** in the toolbar and select **'Import Wizard'**.
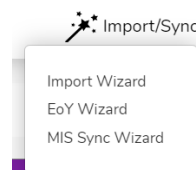
   The Import window will open:

   The **'First row is header'** box is automatically ticked. If you have not added headers to your

   spreadsheet, you should untick this otherwise the first user in your spreadsheet will be lost.

You have two options when inputting data from your spreadsheet into Manage Users:

❷ You can save your spreadsheet as a **.csv file**. Then click on **'Select a file'** and select that csv file.

This is a better option for large numbers of pupils where you have a big spreadsheet.

❷ Or you can highlight and copy your pupil information, and then paste it into the box provided.

Set data source

Upload a file. Either Excel or csv. Or paste data from MS Excel into the box below.

☑ First row is header

🔗 Select a file

Name	Class	UPN
Lily Lloyd	4A	ff432786329046
John Smith	4A	ft214012947112

3. Confirm that the column headers are matched to the correct data, e.g. that the column

header 'Full Name' refers to a list of full names!

❷ The possible column headers are: **Full Name, Forename, Surname, Username, Password, Email, Role, Shared folders, Class, UPN, Groups**.

❷ The only **required** fields are: *either* Full Name *or* both Forename **and** Surname, UPN.

❷ However, it is very useful to include **'Class'** at this stage; it will save you time in having to do this manually later.

❷ You may also wish to include Username and Password fields if you wish to match them to other usernames and passwords that pupils use. If you do not add usernames and passwords then you will have choices about which format to generate these in, later on in the import process.

Import Users Wizard

1 ———— 2 ———— 3

Set data source   Confirm Columns   Validating Data   G

Confirm Columns

Please select the column that matches your data.

Display Name	Class	UPN
Frank	yea4	

If a header is incorrect, you will be able to click on the **drop-down** arrow and choose the correct

header title. For example, you may have used the header **'Name'** whereas the program will look

for Full Name. Any columns that the program cannot identify will be given the header **'Ignore'**

and will be removed at the next step unless changed.

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4. After clicking **'next'** you will be offered 4 ways to mass generate usernames:

    ❷ Use full names: LilyLloyd

    ❷ Use initial: LL

    ❷ Use forename initial + surname: LLloyd

    ❷ Use forename + surname initial: LilyL

Select your preference and then click **'next'**.

5. There are 5 different types of password that can be generated:

    ❷ **'Animals'**, **'Colours'** and **'Things'** generate a password that is a word followed by numbers. For example, selecting colours may generate Password: **red73**

    ❷ **'Picture Pin'** - this will appear as a 4-digit number at this stage of the process. However, the digits correspond to 4 pictures of animals that children can click on when they login. The pictures of animals will also appear on their login cards. This is an easier way for younger children to get used to remembering passwords.

    ❷ **'Two Digit Picture Pin'** - This generates a two-digit password. This is a simple password to remember. The password will also correspond to two pictures like the Picture Pin.

6. Click 'Next' and you will be presented with the confirmation screen. Check if everything is correct:

    ❷ Rows appear in green when you are successfully adding a new user.

    ❷ Rows appear in orange when you are editing a user that is already in the system.

    ❷ Rows appear in red when there has been an error. If you click under the **'errors'** column, there will be an indication of why the users can't be added.
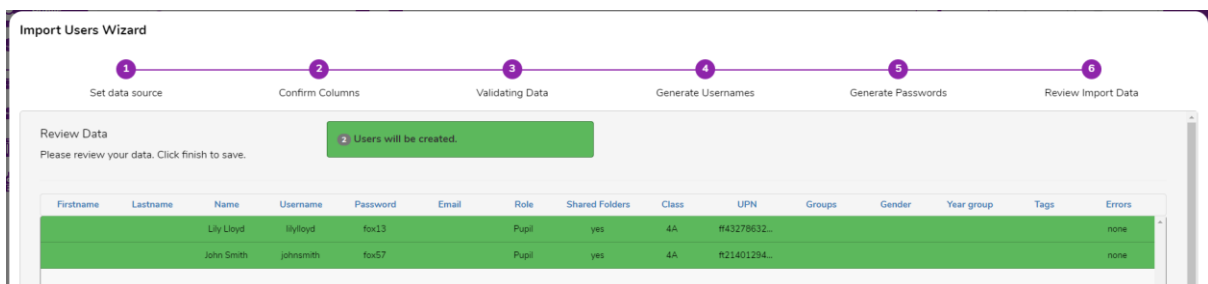
6. Finally, click **'Finish'** and you will see a confirmation of the users that have been successfully added. Make sure that this number matches the number of pupils you were expecting.

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How to manually add pupils

You can add pupils from the **'Pupils Screen'**. It is possible to also add them when editing classes or or groups. For ease, this manual focuses on manually adding pupils via the **'Pupils Screen'**.
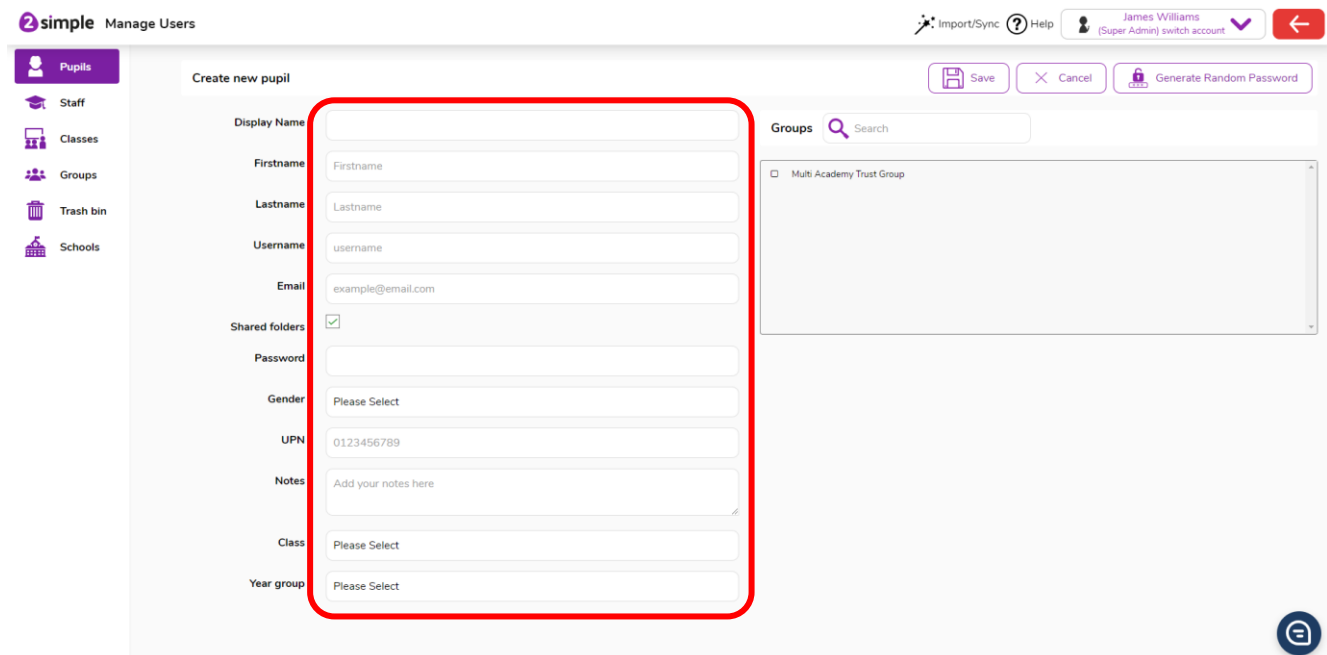
Add a pupil from the Pupils Screen

1. Choose **'Pupils'** on the left-hand menu. Click the **'Add'** button.
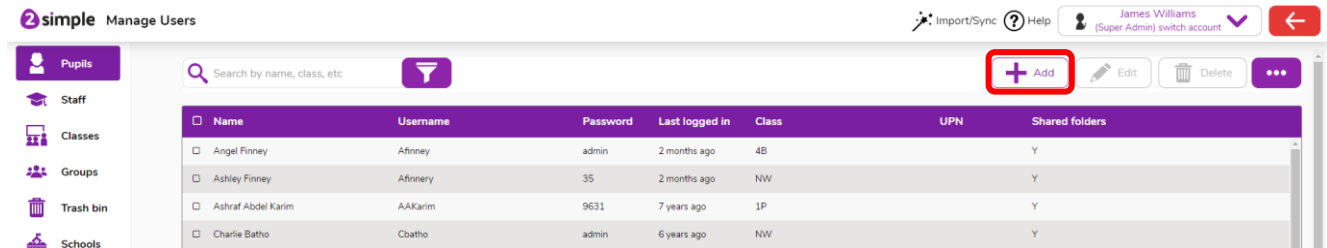
2. You will be presented with the Create new pupil screen. Complete the fields for the pupil.
    Note: Striver users should complete **'Gender'** field.

3. If you have already created Groups or Classes, you can assign the pupil to them there. Click **'Save'** to complete.

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How to manually edit pupils

1. Choose **'Pupils'** on the left-hand menu. You can search for the relevant pupils by entering name, class, username etc into the search box.
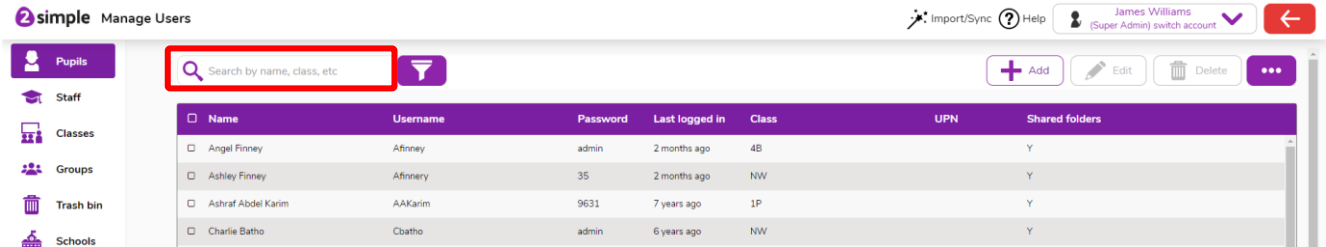
2. Highlight one or multiple pupils by clicking on them. Click on the '**edit**' button.
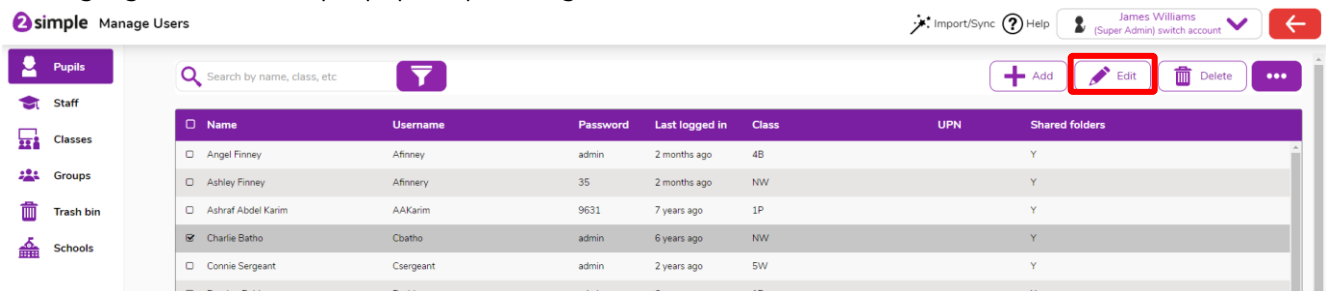
3. If you have only selected one pupil you will see a full range of options you can edit.
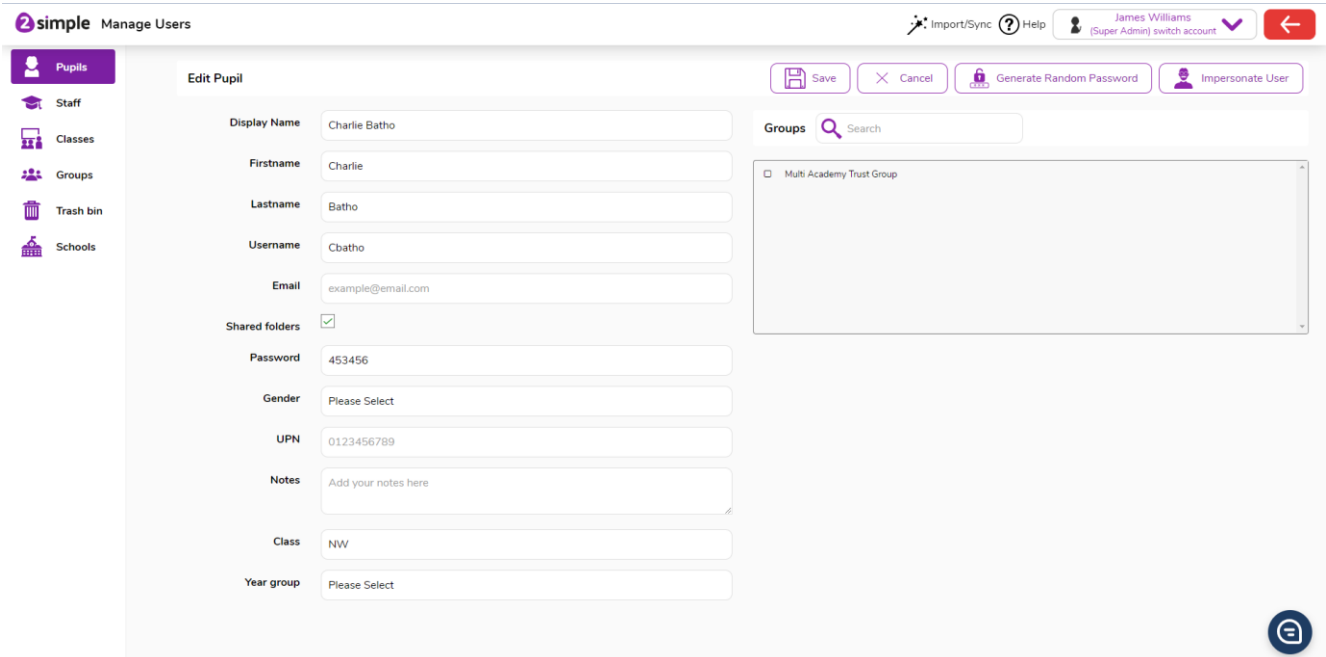
If you select multiple pupils, you will see fewer options as edits here will apply to all selected pupils.

For example, you can't multi-edit usernames as these must be unique.
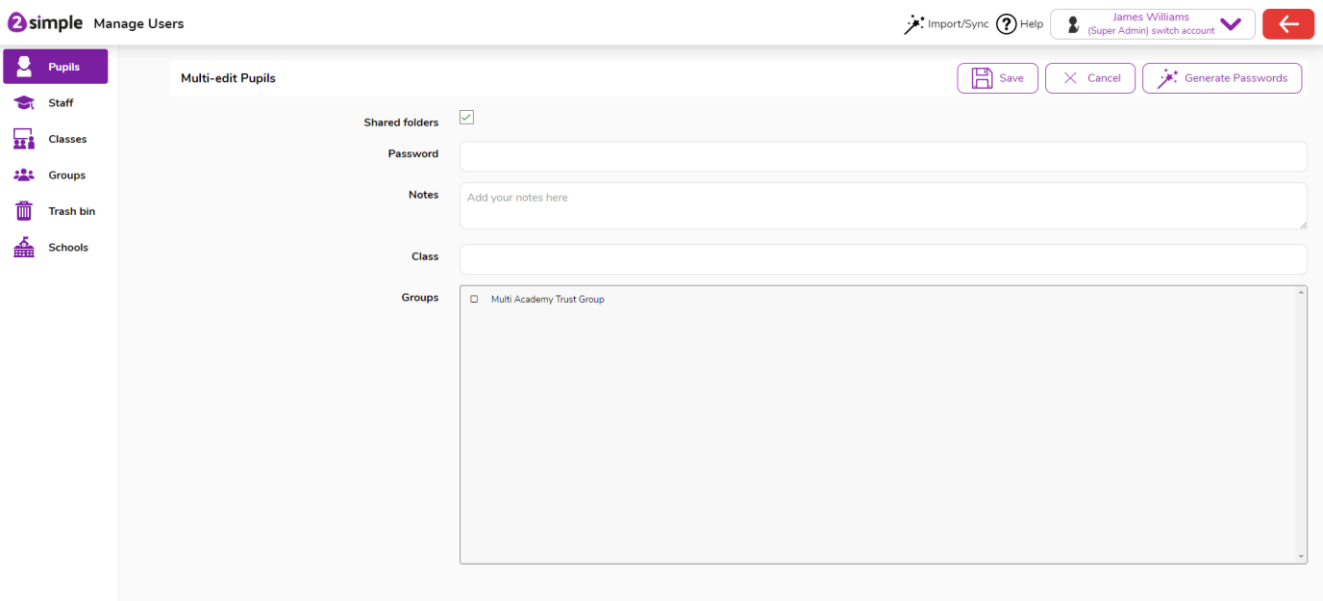
4. When you have finished making your changes, click **'Save'**.

How to delete pupils

1. Select **'Pupils'** from the left-hand menu. You can search for the relevant pupils by entering name, class, username etc into the search box. Highlight the pupils you wish to delete by clicking on them.
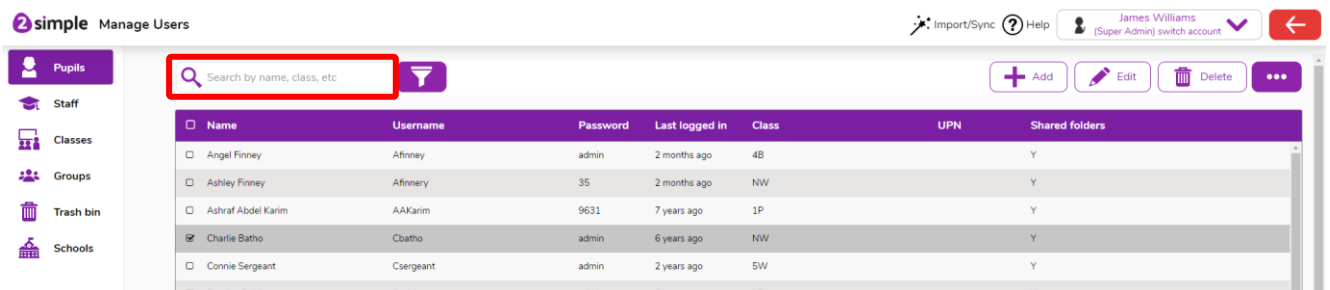
2. Click on the delete button. Confirm you are sure you want to delete the selected pupils.
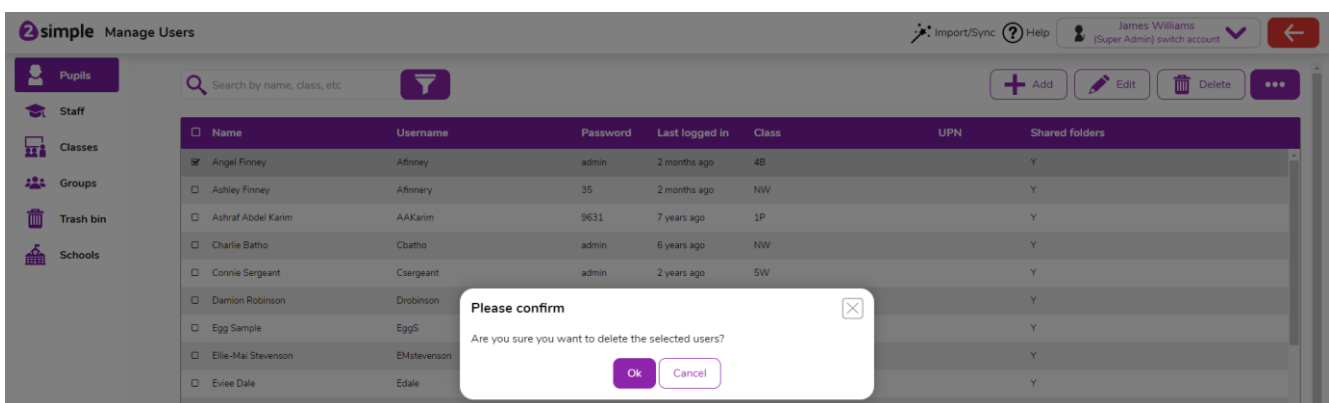
3. If you delete a user by mistake, see **'How to restore a deleted pupil'** for more information.

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How to restore a deleted pupil

1. Select **'Trash bin'** from the left-hand menu. In the trash bin you will find users who have been

    deleted but not permanently deleted.
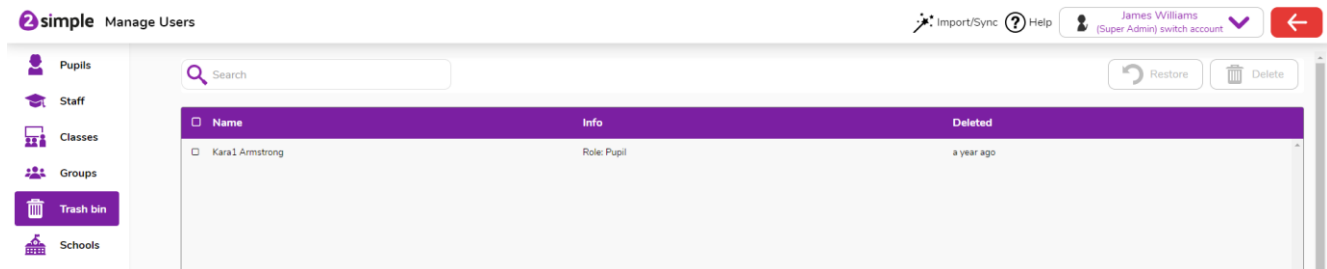
2. Highlight the pupils you wish to restore.
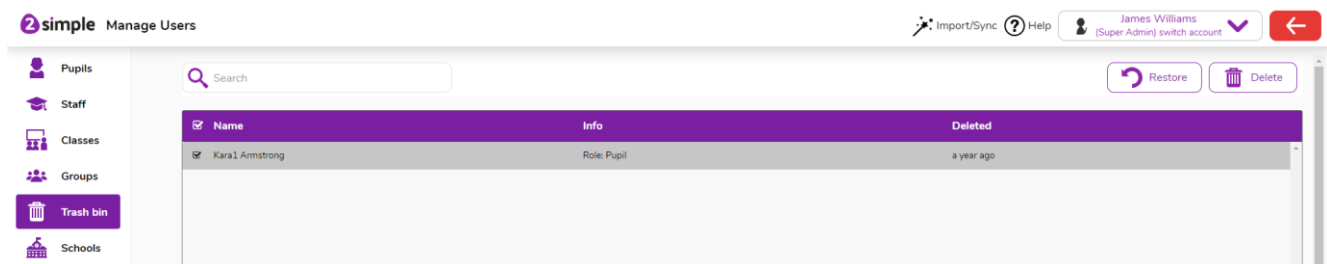
3. Click the **'Restore'** button and your pupils will be added back into the pupils list. Please note

    that restored pupils will no longer be assigned to groups or classes.

How to create login cards, parent letters and export pupil data

1. Select the pupils you want to produce data for. Either select all pupils by selecting the top check box, to the left of the header 'Name' or select only the ones you wish to return data for. You can search for the relevant pupils by entering name, class, username etc into the search box.
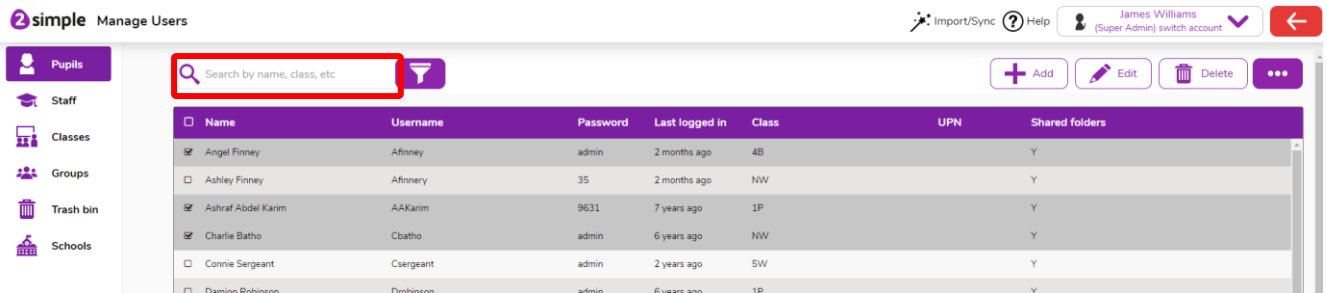
2. Click on the purple meatball menu button to expose the **'Export/Print Logins'** button.
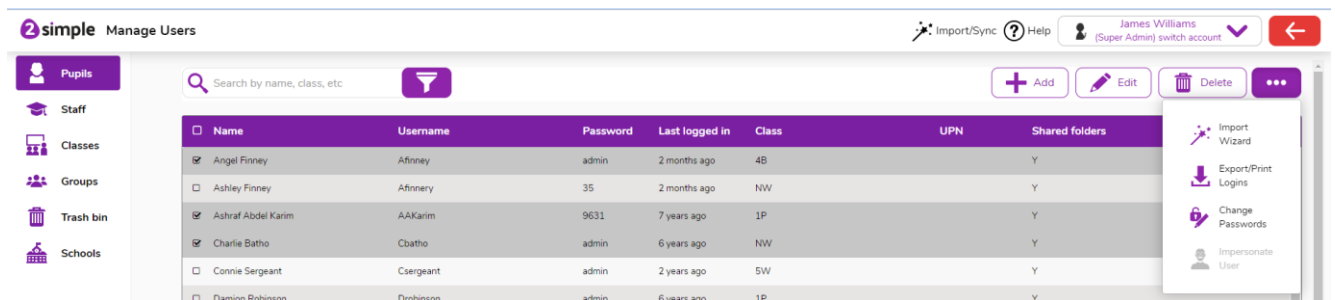
Once you click on the **'Export/Print logins'** button you will have three options:

- ❷ **Produce an Excel file**- This will produce a list of all the selected data.
- ❷ **Produce PDF login cards**- This will produce login cards for your pupils containing their usernames and passwords.
- ❷ **Produce PDF letters**- This will produce a letter to parents explaining what Purple Mash is and will contain individual pupil login details.
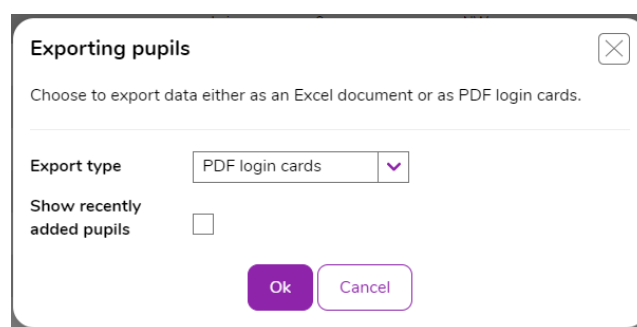
3. Select the options that you would like and click '**Ok**'.

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How to mass generate new passwords for existing pupils

1. Select **'Pupils'** from the left-hand menu. Click the checkbox to the left of the header 'Name' in order to select **all** pupils or select individual pupils to only change the passwords of selected users.
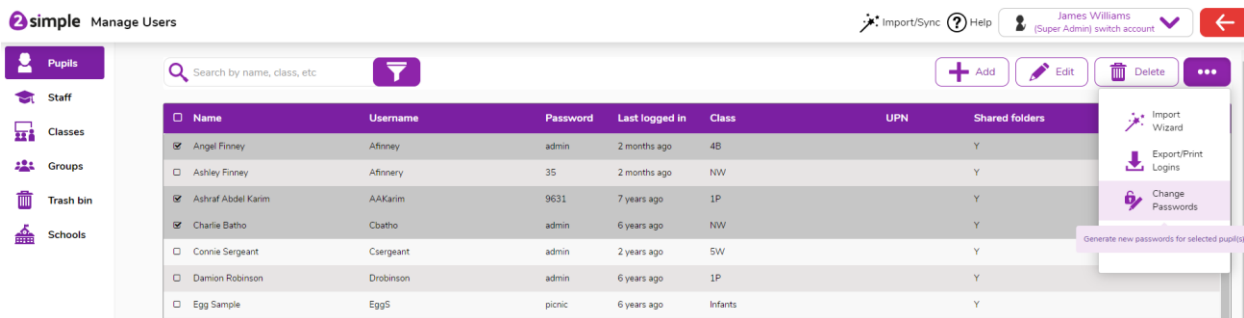
2. Click on the purple meatball button and select Change Passwords.
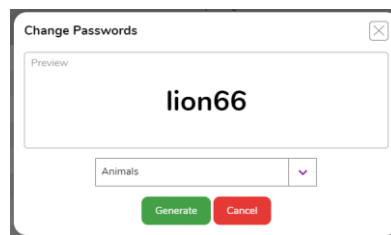
There are seven different types of password you can choose to apply:

- ❷ **'Animals', 'Colours'** and **'Things'** generate a password that is a word followed by numbers. E.g. password: **red73**.

- ❷ **'Picture Pin'** generates a 4 Digit Picture Password. The pictures are of a number of different animals and correspond to 4 digits 0-9. This is an easier way for younger children to get used to remembering passwords. Pictures that make up their password will appear on login cards.

- ❷ **'Two Digit Picture Pin'** - This generates a two digit password. This is a very simple password to remember. The password will also correspond to two pictures like the Picture Pin

- ❷ Five letter noun followed by three digits- e.g. **green218**

- ❷ Six letter noun followed by four digits e.g. **cotton4385**

3. Click 'Generate' to set passwords and finish.
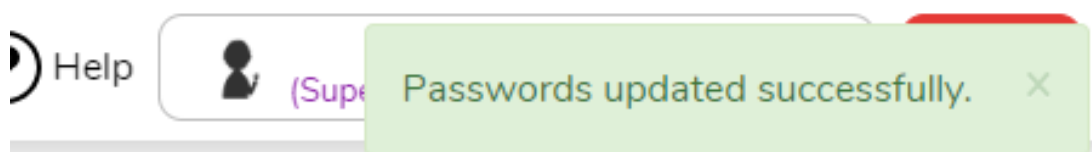
Staff

Here you will find all the information you will need to set up your staff members.

❷ [How to use the Import Wizard to add and edit staff](#)

❷ [How to manually add staff](#)

❷ [How to manually edit staff](#)

❷ [How to delete staff](#)

❷ [How to restore a deleted staff member](#)

❷ [How to export staff data](#)

❷ [Temporary passwords](#)

How to use the Import Wizard to add and edit staff

1. The Import Wizard can mass-create users in Purple Mash using data from a spreadsheet. Be aware, all staff users are sent a password link, this isn't set in Manage Users. Create a spreadsheet with six headers: **Forename, Surname, Display Name, class, role** and **email**. Download an example spreadsheet here

   ❷ **'Display name'** is the name that will be displayed when a member of staff is logged in. This is helpful particularly when a teacher might have their screen displayed on an interactive whiteboard.

   ❷ **'Class'** should be the class name rather than the year group especially in multiple-form entry schools.

   ❷ **'Role'** refers to permissions within 2Simple and the Manage Users application. For a typical staff user you will want to give them the role **'Teacher'.** You can also assign the role **'Super Admin'** but this should only be used if you want to give complete administrative powers to a specific user. If this column is not filled in for a given member of staff, he or she will be automatically designated as a **'teacher'**.

   ❷ **'Email'** address is important as a unique identifier for staff and also allows them to use the retrieve password features in Purple Mash.

2. Ensure these columns are completed for each member of staff. We can mass-generate usernames for you at a later step. However, if you wish to set it up yourself you can add the column with the headers **'username'**

	A	B	C	D	E	F
1	Forename	Surname	Display Name	Class	Role	email
2	Peter	Pan	Mr. Pan	Macaws	Teacher	mrpan@mountainhigh.normouth.sch.uk
3	Wendy	Darling	Miss Darling	Wrens	Teacher	missdarling@mountainhigh.normouth.sch.u
4	Michael	Darling	Dr. Darling	Crows	Teacher	drdarling@mountainhigh.normouth.sch.uk

3. Click on **'Staff'** on the left-hand menu. Next, click on **'Import wizard'**. The Import window will open.

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The **'First row is header box'** is automatically ticked. If you have not added headers to your spreadsheet, you should untick this or the first user in your spreadsheet will be lost.

You have two options to put the data on your spreadsheet into Manage Users: You can save your spreadsheet as a .csv file. Then click on **'Select a file'** and select that csv file. Or you can highlight and copy your staff information, and then paste it into the box provided.

Your data may not align into neat columns but don't worry, this shouldn't be a problem.

4. Next you will be able to confirm that the column headers are matched to the correct data, e.g. that the column header **'Firstname'** refers to a list of first names.
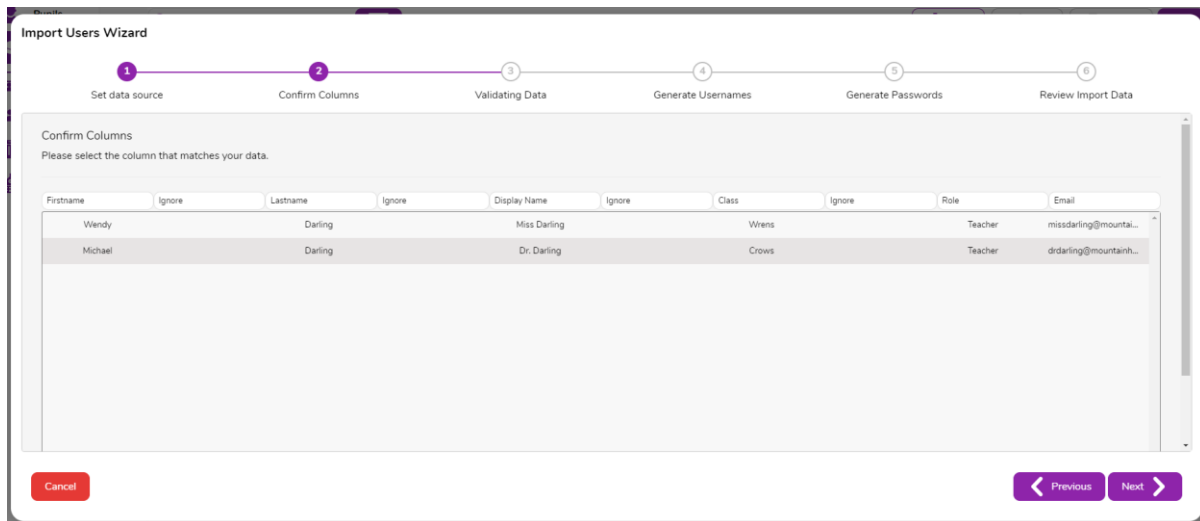
If a header is incorrect, you will be able to click on the column headers and choose the correct header title. For example, you may have used the header <u>**Name**</u> whereas the program will look for **'First Name'**.

Note: Any columns that the program cannot identify will be given the header 'Ignore' and will be removed at the next step unless changed.

5. After clicking **'Next'** you will be offered 4 ways to mass generate usernames.

- ❷ Use full names: LilyLloyd
- ❷ Use initial: LL
- ❷ Use forename initial + surname: LLloyd
- ❷ Use forename + surname initial: LilyL

Select your preference and then click '**Next**'.

6. Here you can check if everything is correct.
- ❷ Rows appear in green when you are successfully adding a new user.
- ❷ Rows appear in orange when you are editing a user that is already in the system. If this is not what you wish to do, you may need to change the username you have chosen.
- ❷ Rows appear in red when there has been an error. If you click under the errors column,

there will be an indication of why the users can't be added.

7. Finally, click 'Finish' and you will see a confirmation of the users that have been successfully added. Make sure that this number matches the number of pupils you were expecting.
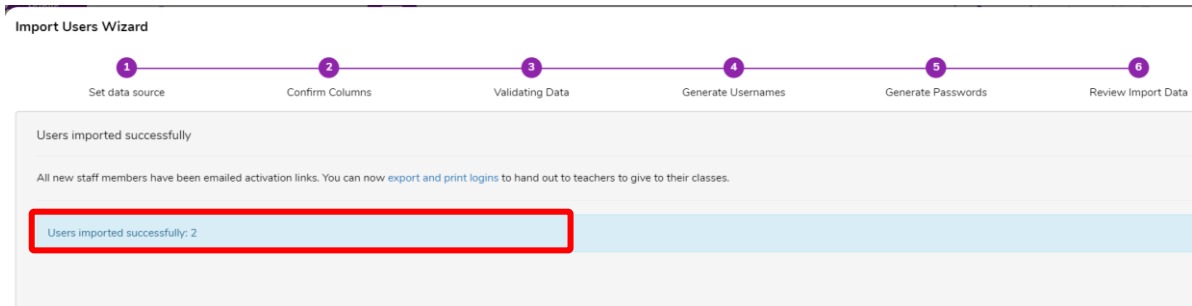
How to manually add staff

1. Select **'Staff'** on the left-hand menu. Click the **'Add'** button to add a staff member.
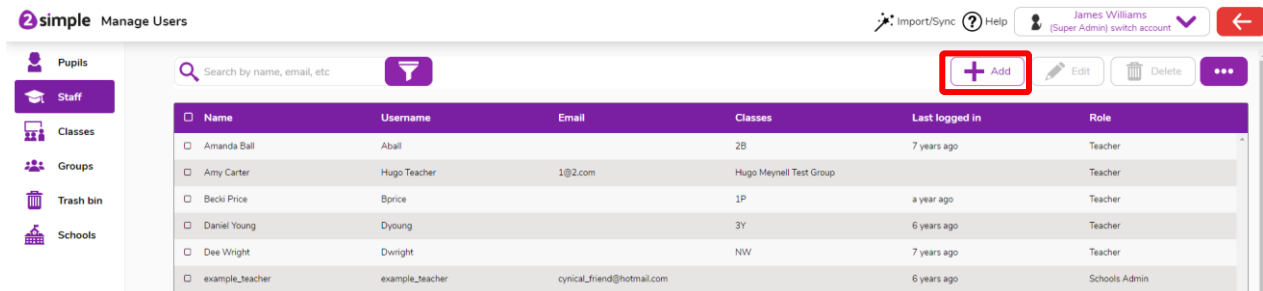
2. Complete the fields on the staff user form. If you have already created Groups or Classes, you can assign the staff to them now
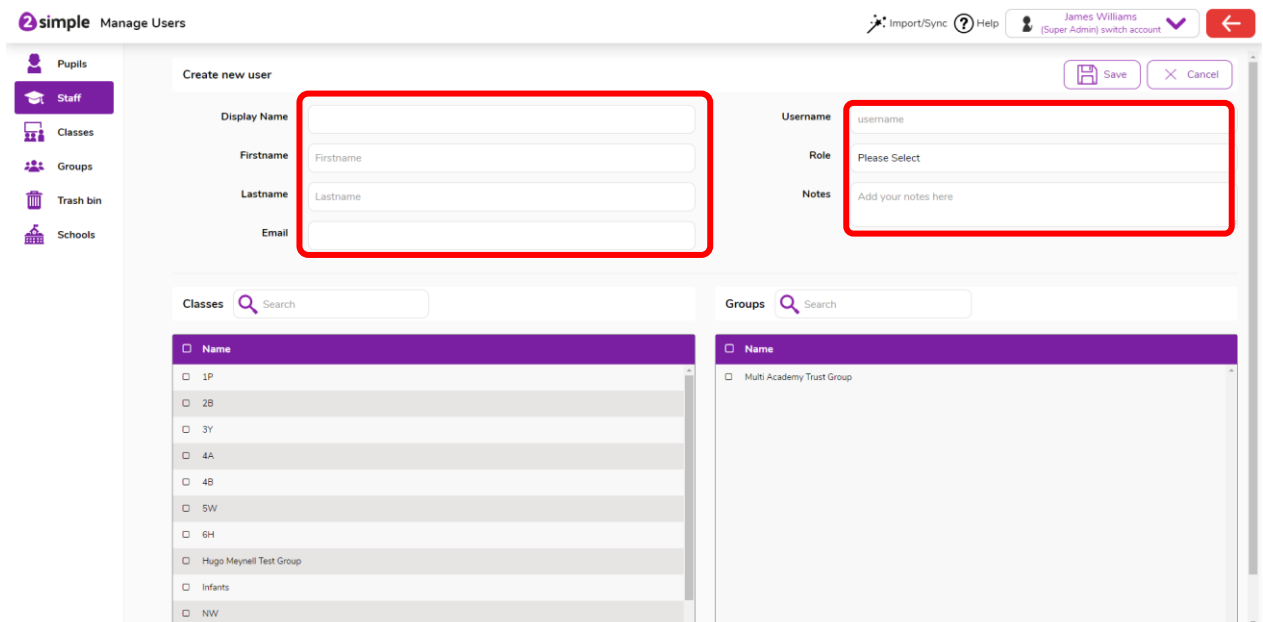
3. Click **'Save'** to complete. The staff member will be sent an automated email containing instructions to set their password. For instructions about resending this email see the edit staff section.

How to manually edit Staff

1. Choose **Staff** on the left-hand menu. Highlight one or multiple teachers by clicking on them.
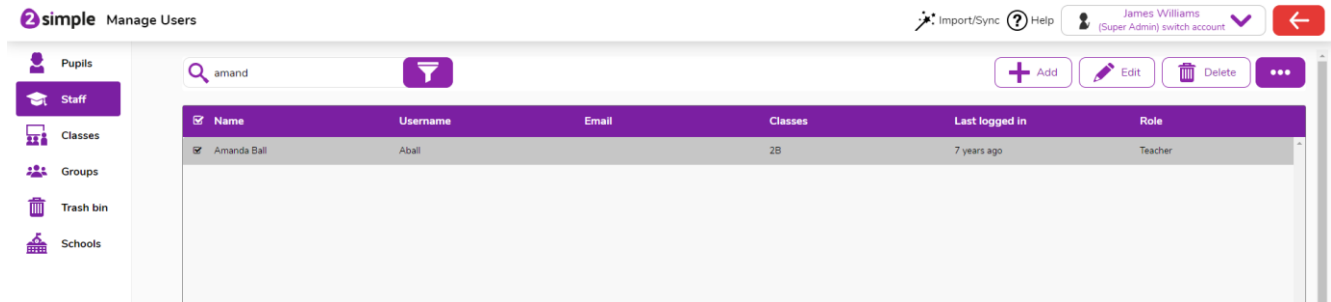
2. Then click the **'Edit'** button. If you have only selected one teacher, you will see a full range of options you can edit.

Note: DotCom users have this checkbox available for staff members who are Teacher role.
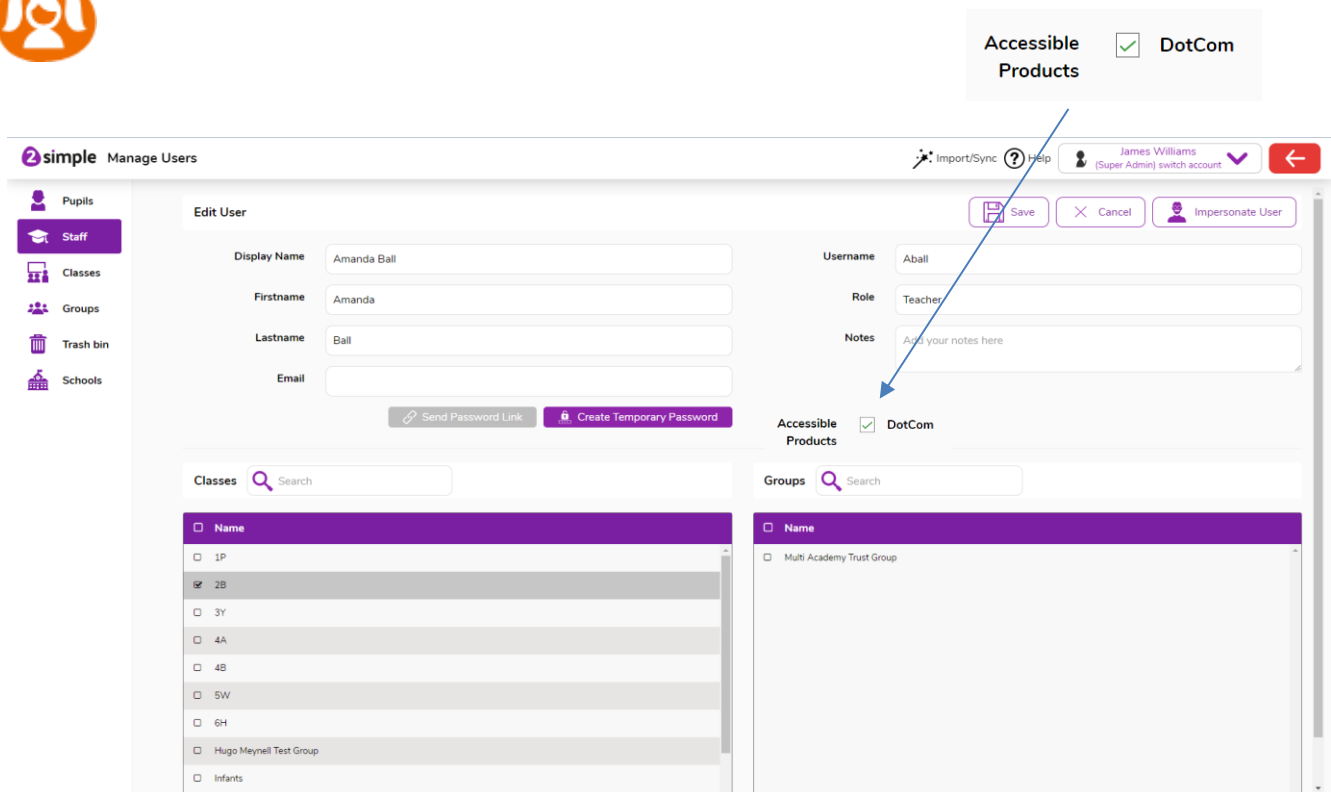
3. To resend the teacher an email to set their password, click on the **'Send Password link'** button.

4. If you select multiple teachers, you will see fewer options as edits here will apply to all selected teachers. For example, you can't multi-edit usernames as these need to be unique.
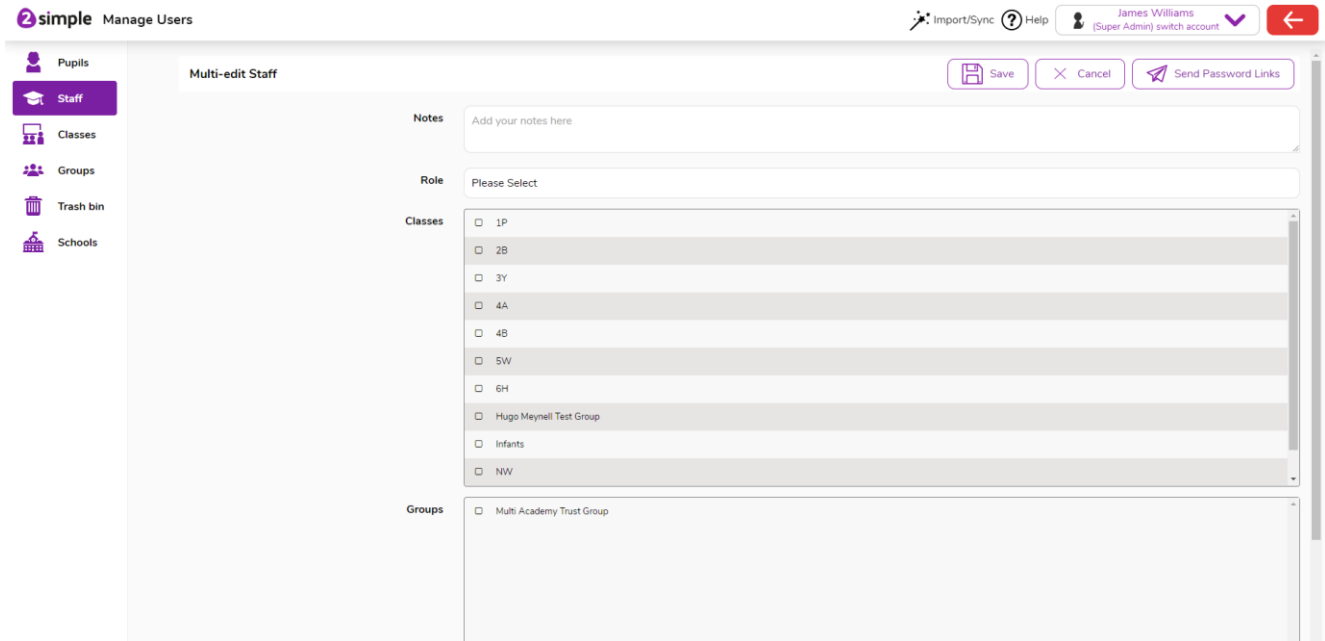
5. You can resend password reset emails to all of the staff by clicking on the **'Send password link'** button. When you are finished making changes, click **'Save'**.

How to delete staff

1. Highlight the staff members you wish to delete then click on the **'Delete'** button.
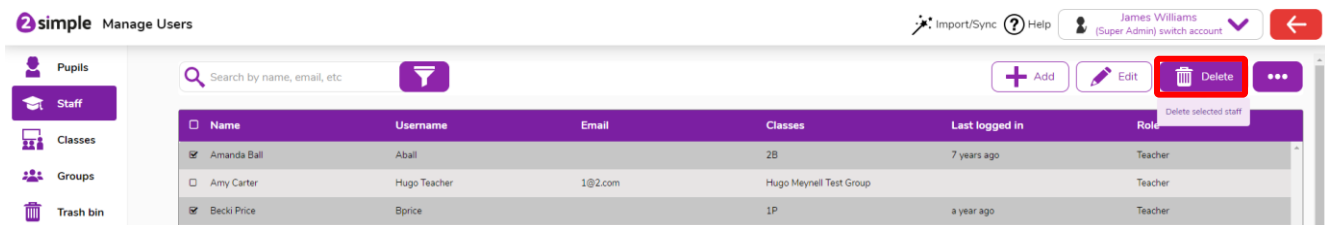
2. Confirm you are sure you want to delete the selected staff members. If you delete a user by mistake, you can recover them. See ['How to restore a deleted staff member'](#) for more information.
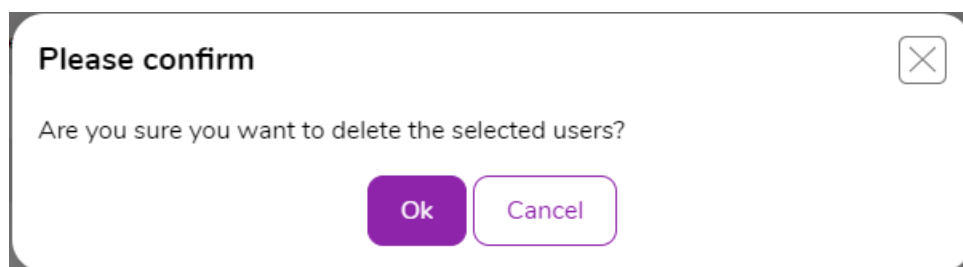
How to restore a deleted staff member

1. Select **'Trash bin'** from the left-hand menu. In the trash bin you will find users who have been deleted but not restored or permanently deleted
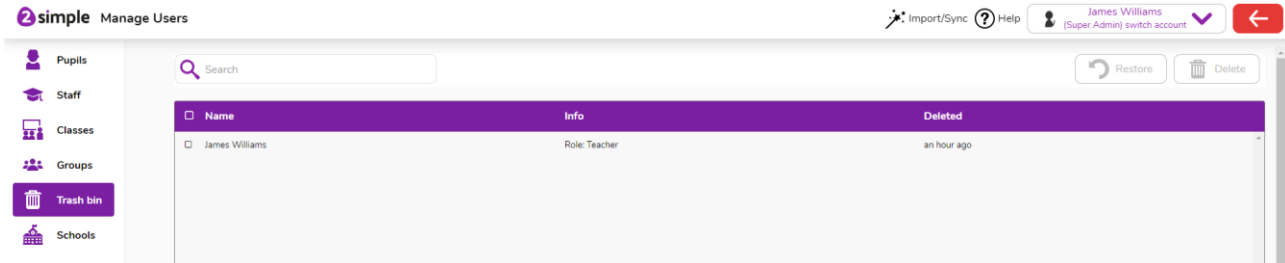
2. Click on the user you wish to restore.
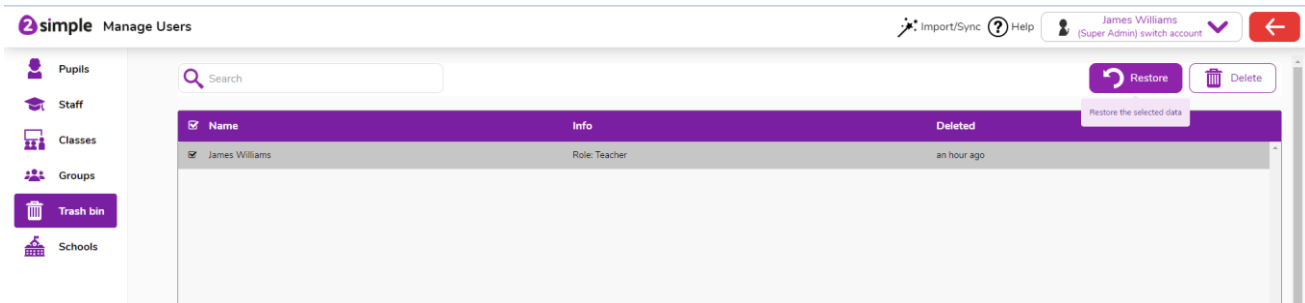
3. Click the restore button and the staff member will be added back into the staff list. Please note that restored staff members will no longer be assigned to groups or classes.

How to export staff data

1. Select the members of staff you want to produce data for. Either select all members of staff by selecting the top checkbox, to the left of the header **'Name'** or select only the ones you wish to return data for.

2. Click on the right hand **purple meatball menu** button to see your export options.
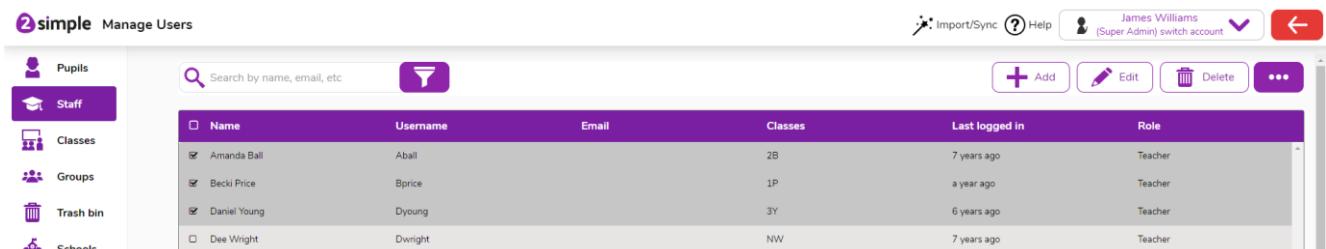
3. There are two options for exporting staff data.

❷ You can produce login cards for your staff. For staff, these will only include the URL of your school's portal, Name, email and username details. Passwords can only be sent to teachers by automatic email. For details of how to send these, see the How to manually edit staff section.
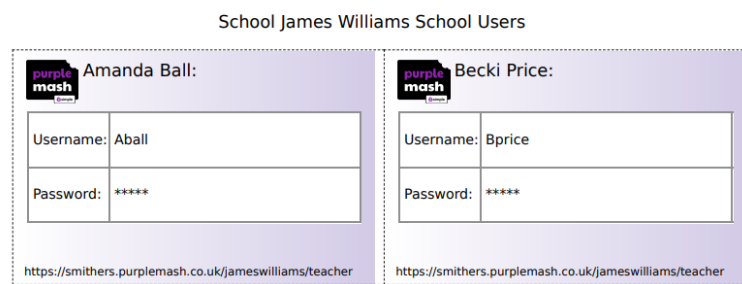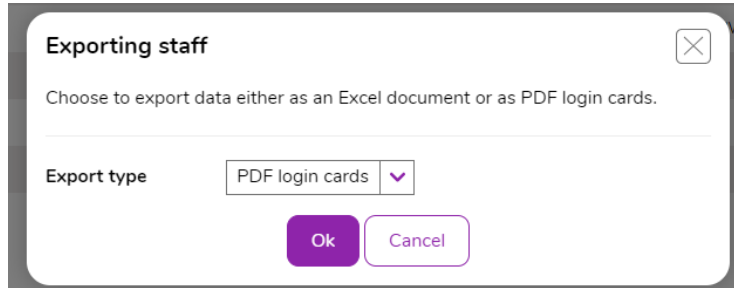
❷ You can produce an Excel document displaying staff data. This document will not contain password information. Passwords can only be sent to teachers by automatic email. For details of how to send these, see the How to manually edit staff section.

Temporary Passwords

1. In cases where teachers are unable to check their email easily to retrieve their passwords for example in a training session, there is the administrator option of creating a temporary password for staff.

    - ❷ Temporary passwords are shown in login cards and in Excel exports. They are not starred out. Temporary passwords are only valid for 3 days.
    - ❷ As soon as the user logs in with their temporary password, they will have to set a new password and the temporary password will be removed.
    - ❷ The temporary password will not overwrite any existing passwords. Creating a temporary password will not prevent them logging in with their original password if they suddenly remember it or if the temporary password is created for an unintended user.

2. To create temporary passwords in bulk, select the members of staff you want to produce data for. Click on the right hand '**purple meatball menu'** and select '**Create Temporary Passwords'**. A confirmation will be given in the top right corner of the screen that this has been successful.
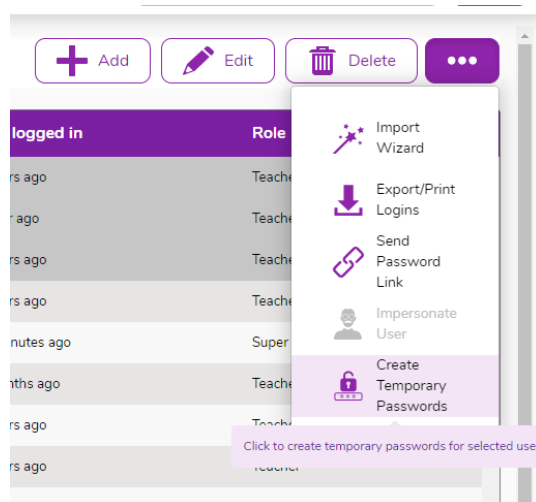
3. To create a temporary password for an individual member of staff either complete the previous step but for one user or click on an individual staff member to open the edit user screen. Then click on the **'Create Temporary Password'** button.

Parents

This is a feature specific to Purple Mash. Here you will find all the information you will need to manage parents associated with children's accounts on Purple Mash.

- ❷ [Introduction to Parent Portal](#)

- ❷ [How to manage parents from the Parents area](#)

- ❷ [How to manage parents in Pupils area](#)

- ❷ [How to generate new parent codes](#)

Introduction to Parent Portal

Parent Portal is an exciting feature of Purple Mash which allows parents/carers to gain insight into their child's learning on Purple Mash. They can easily see all the activities associated with their child, including any rewards or approved work to display boards and blogs. Furthermore, they can see any 2Dos set and the status of their progress against the set 2Dos. A child may wish to share a piece of work with their parent, this too can easily be accessed via Parent Portal.

Registration

1. All login cards which are printed for pupils will have a Parent Code field on them. All parents need to do is use the URL on the login card along with the Parent Code to register for access to Parent Portal. Each child can have a maximum of four 'Parents' associated with them. At any point, a Parent can be [disassociated/removed](#) from a child's account.

2. Parents need to use the URL on the card to access the school portal.

3. Select Family and then click register as a parent.
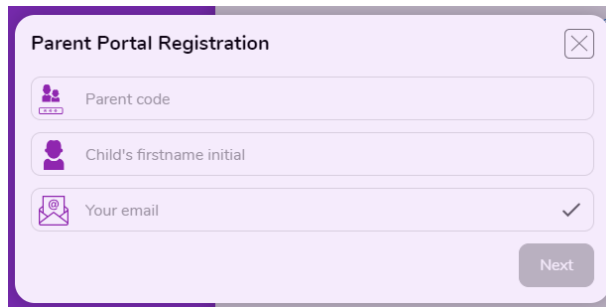
4. Parents will need to enter the parent code on the login card. The initial from the child's first name and their email address. Then click next.

5. Once the parents have successfully registered, they will receive a **'Welcome Email'** with an **'Activation Link'**.

Parent Portal Familiarisation

1. **Activity-** The Activity Stream shows all the activities associated with a child, with most recent showing first. Activity Stream shows: 2Dos set and handed in, approved work for display boards or blogs, rewards given, shared work and commented work.

2. **2Dos-** The 2Dos tab enables parents to see any work 'set' or 'In Progress' as well as any 2Dos 'Handed in'. Parents can click on the 'Handed In' tab and view comments and rewards given for individual pieces of work. Additionally, they can delve deeper and look at an individual piece of work.

3. **Work-** Any work that a teacher has commented on will appear here as well as any work that a child has wished to share with their parent.

4. **Help-** This section contains a useful 'Welcome' video and 'How to' video for parents.

5. **Access Pupil View-** Parents are able to see a Pupil View of Purple Mash, this is particularly helpful if a parent wishes to work with their child on a task or in the unfortunate event that a child has temporarily misplaced their login card. Parents will be prompted with a password screen which will ask for their Parent Portal password they would have created at registration.

6. **My Account-** Parents can update their details here and choose to opt out of 'Weekly Digest Emails'.

7. **Child-** If a parent clicks on the name of their child they will have the option to select another child they are associated with.

8. **Weekly Digest Emails-** Weekly Digest Emails provide parents with a breakdown of activities their child has been involved in (an example of this can be seen on the following page). These emails are sent to the email address used by the parent to register for Parent Portal.

This week **Deena Joseph** has:

Received 1 comment on their 2Dos.

Handed in 1 2Do.

Had 1 blog post approved.

Had 1 piece of work approved on display boards.

Shared 1 piece of work with you.

Received 1 reward for their work.

Received 1 comment on their work.

This week **Divya Joseph** has:

Received 2 comments on their 2Dos.

Handed in 2 2Dos.

Had 2 blog posts approved.

Had 2 pieces of work approved on display boards.

Shared 4 pieces of work with you.

Received 4 rewards for their work.

Received 2 comments on their work.

•••

Kind regards,

How to manage parents from the Parents area

1. To view any parents that have registered for Parent Portal. Click on the '**Parents'** item in the left panel. The information visible on the Parent area screen is: Firstname, Lastname and Email. Parents can be edited or deleted using the respective buttons in the top right of the Parents area.
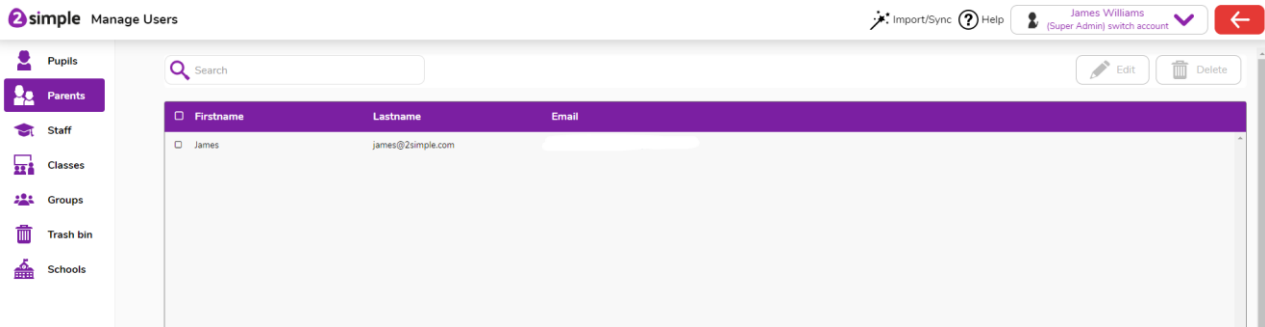
2. When deleting a parent, please be aware that to enable a parent access again once deleted, they will need to be given a new [Parent Code](#) for the pupil they are to be associated with.

3. Select the parent you wish to edit and click on the '**Edit'** button. You will see a screen similar to below. Changing the permission for a parent to access pupil view is possible in edit mode as well as being able to easily see all the children associated with that child. Any child you wish to remove association with a 'parent', can be done by selecting the appropriate child and then **'Remove Children'** button. Once you have made any changes in the Edit mode, click on the **'Save'** button.
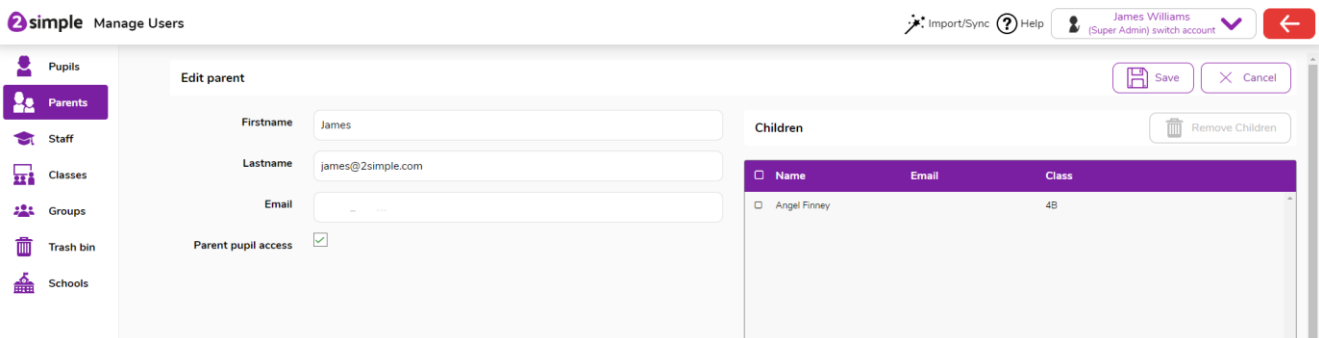
How to manage parents from the Pupil area

1. Click on the **'Pupils'** in the left menu and select a pupil to edit.
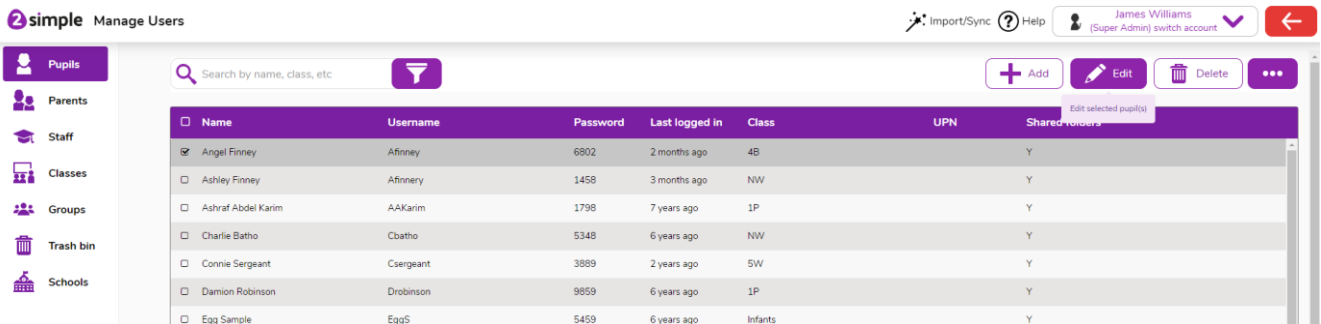
2. You will be presented with the Edit pupil page. Here you can either:

    - Generate a new parent code for a pupil.
    - Remove a parent associated with the pupil.
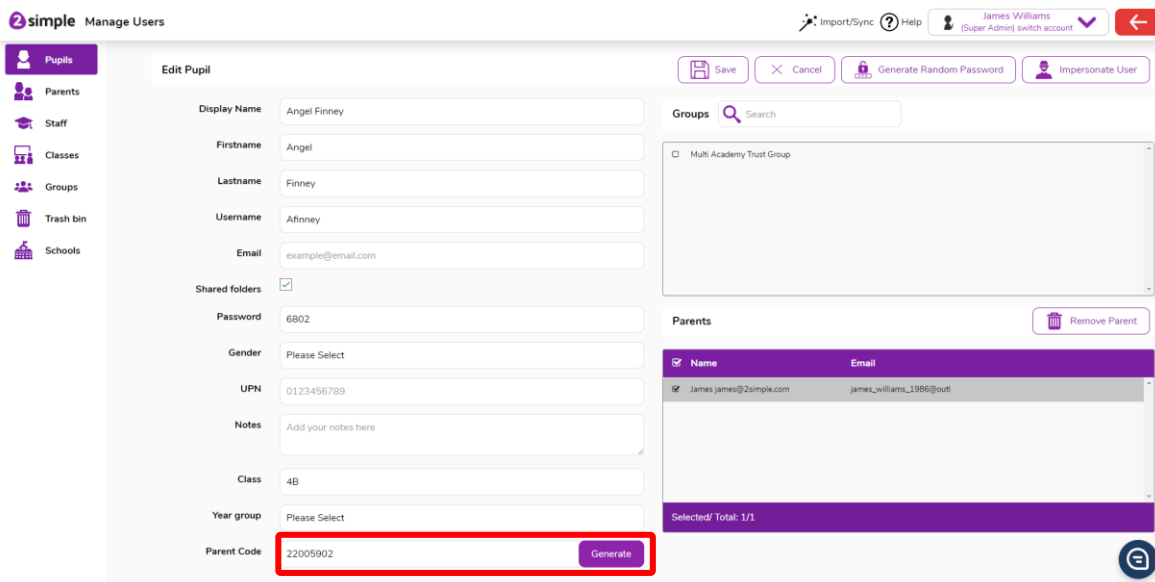
3. To generate a new Parent code click the **'Generate'** button next to the Parent Code Field. If you choose to generate a new Parent Code for a pupil, the previous Parent Code will no longer be useable for any new registrations.
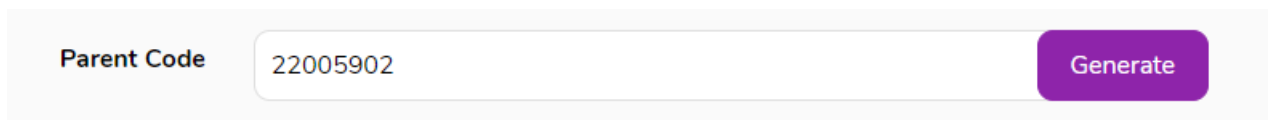
4. To remove a parent from being associated with a pupil, go to the parent table on the right of the screen on the **Edit pupil** page. Select the parent(s) you wish to remove from being associated with the pupil and then click the **'Remove Parent'** button. Ensure you save any changes you make by clicking the 'Save' button.
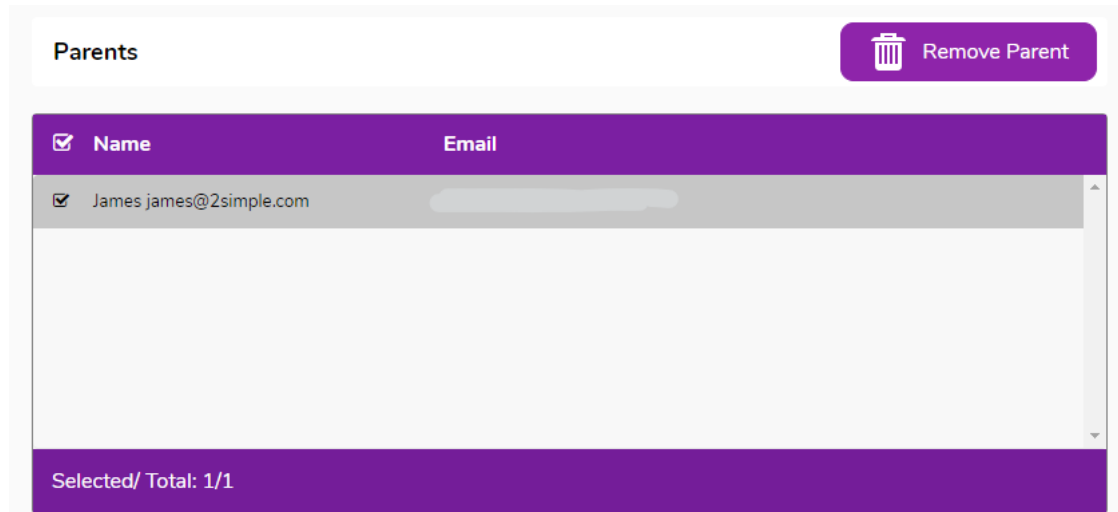
Generating Parent Codes in Pupils Area

1. Click on **Pupils** item in the left menu and select the pupil/s to you would like to generate parent codes for.

2. Click on the **purple menu** button on the right-hand side and click on **'Generate Parent Codes'.**
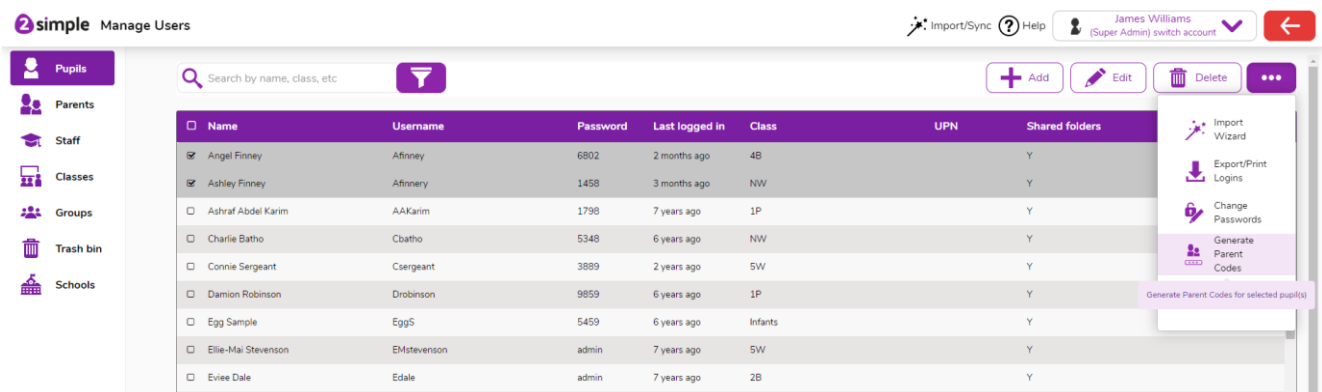
Classes

Here you will find all the information you will need to set up and manage your classes.

❷ [How to use the Import Wizard to add and edit classes](#)

❷ [Manually adding a class](#)

❷ [Manually editing a class](#)

❷ [How to manually add pupils and staff to classes](#)

❷ [Archiving and deleting classes (Python and Purple Mash)](#)

❷ [Create class login cards and export data](#)

❷ [Moving pupils to different classes at the end of the school year](#)

How to use the Import Wizard to add and edit classes

1. Using the Import wizard to add and edit classes follows the same procedure as setting up pupils or staff. When creating the excel sheet with pupil or staff details, you must include a class to assign users to.

2. If the class in question does not already exist in the system, it will be created during the Import Wizard process.

If you do not wish to import the pupils or staff again then see the following sections: How to manually add classes or How to manually edit classes.

For details of how to use the import wizard see either: How to use the Import Wizard to add and edit pupils or How to use the Import Wizard to add and edit staff

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Manually Adding Classes

1. To manually add a class, click classes on the left-hand menu. Click the **'Add'** button.
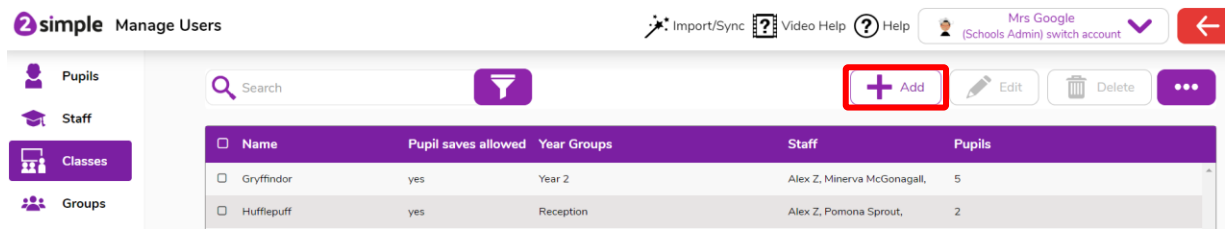
2. You will be presented with the **Add Class** page. Here you can give your class a name and a description.

3. In the top right of the page, you will see a year groups table. Here you can assign the class to the year(s) it is in. It is important that you do this even if your class is named 'Year 1' or similar as this will prove useful at the end of the year when you use the migration wizard.

4. In the bottom left of the page you will see a **Staff** table. Here you can assign staff to the class using the **plus** button. Unassigned staff wont have access to pupils work.

5. In the bottom right of the page you will see a Pupils table. Here you can assign pupils to the class with the plus button.
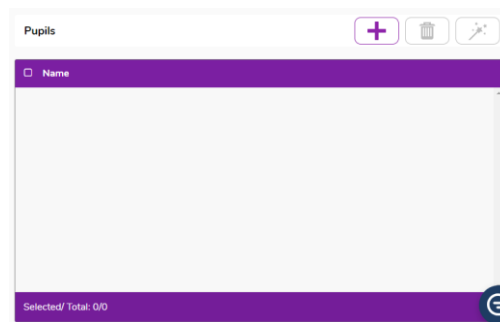
6. When you are finished, click '**save**'.
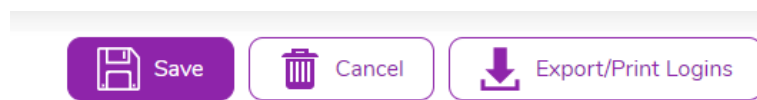
Manually Editing a Class

1. To manually edit a class, click **classes** on the left-hand menu. Click the **'Edit'** button.
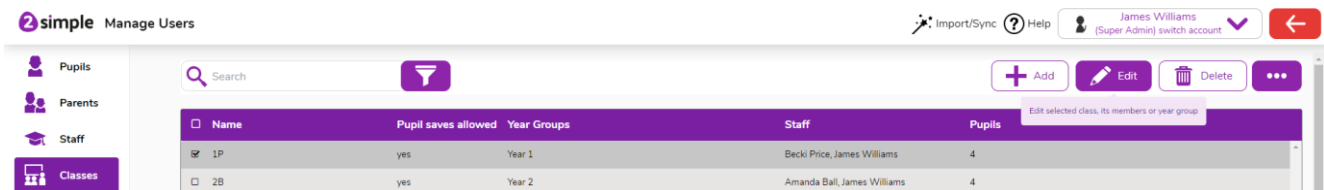
2. If you selected an individual class, you will be able to edit all class data including the name and description. In the **Add pupils** section of the screen, you can also add pupils who are new to the school.
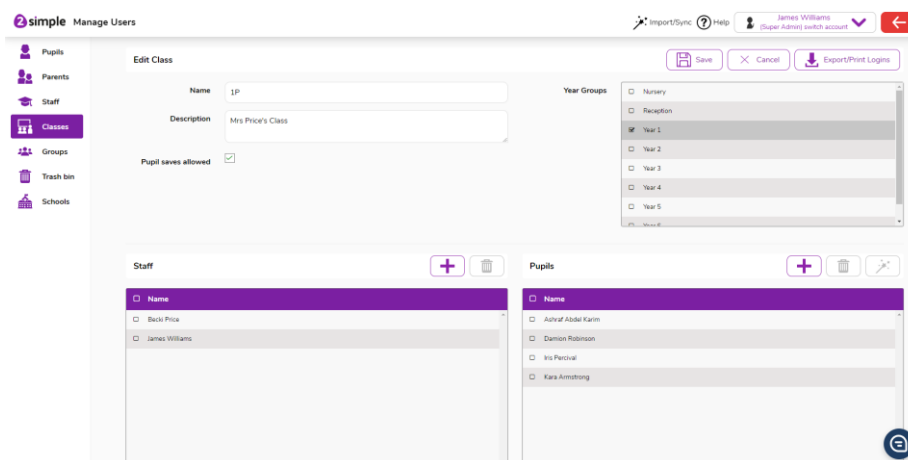
3. Click **Save** to complete.

Manually add pupils and staff to the Classes Area

Pupils:

1. To add a pupil from the classes area, open the Class editing screen for the class you wish to add a new pupil to.

2. In the bottom right of the screen you will see a pupils table. Click on the plus button.
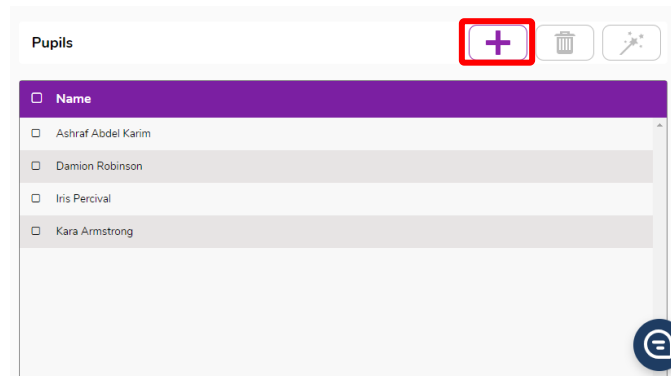
3. This opens the Select Pupils screen. Here you can add a pupil that already exists in the school to a class. However, if the pupil has not yet been added to the school, then click on the Create new pupil button. This opens the Create new pupil screen. This is the same process found in Manually Adding a Pupil Section.
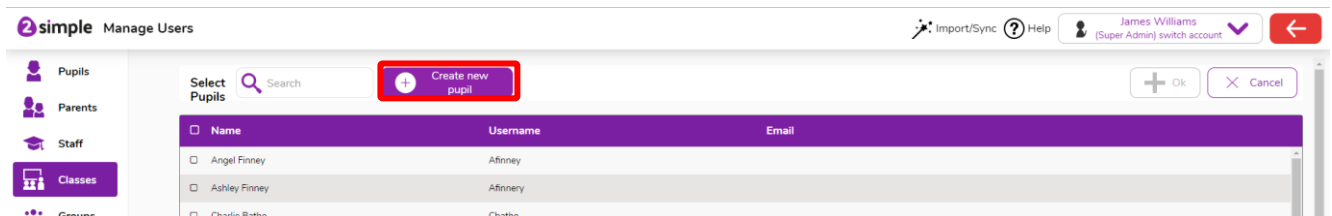
4. On the Edit Class page click the **'Save'** button to save the changes to the class.

Staff:

1. To add a staff member from the classes area, open the Class editing screen for the class you wish to add a new staff member to.

2. In the bottom left of the screen you will see a staff table. Click on the plus button.
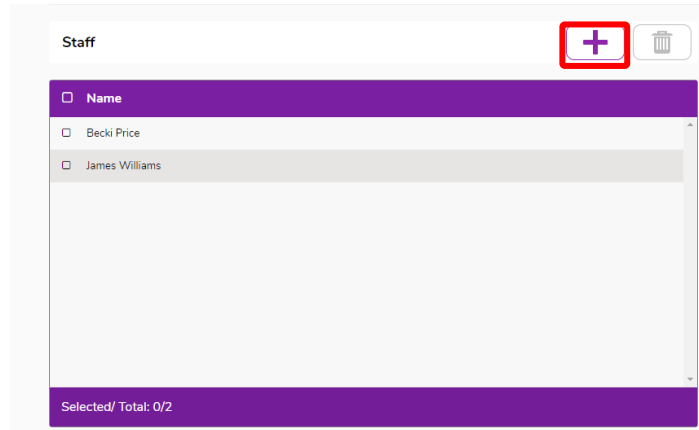
3. This opens the Select Staff screen. Here you can add staff members that already exist in the school to a class. However, if the staff member has not yet been added to the school, then click on the '**Create new staff button'**. This is the same process found in Manually adding Staff.

4. On the Edit Class page click the **'Save'** button to save the changes to the class.

Archiving and Deleting Classes (PM and Pyton)

This section is only applicable to Python and Purple Mash users.

When children move out of a class, you will need to decide what to do with children's work that is in the class folder.

1. When archiving classes you will be presented with two options:

   ❷ Archive the work and send to pupil folders: Creates an archive folder that only staff can access which will contain all of the work. Puts a copy of the work into individual children's 'My Work' folders.

   ❷ Send to pupil folders: Does **not** create an archive folder but does send the work to the individual pupil's 'My Work' folders which they will be able to see.

Archiving work for a class

1. Click **'Classes'** item in the left-hand menu and select a class.
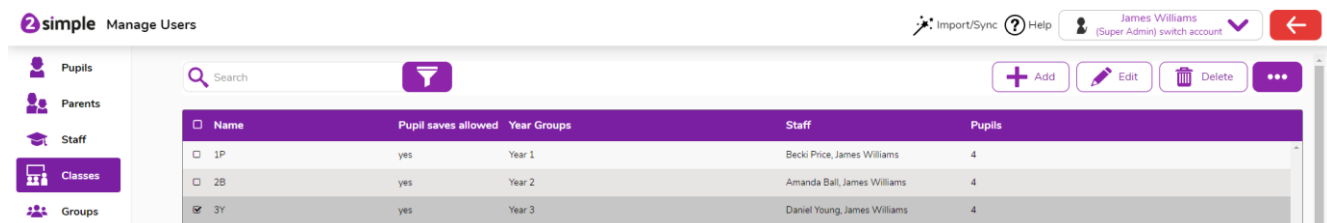
2. Click on the top right menu and select the Archive Work item.
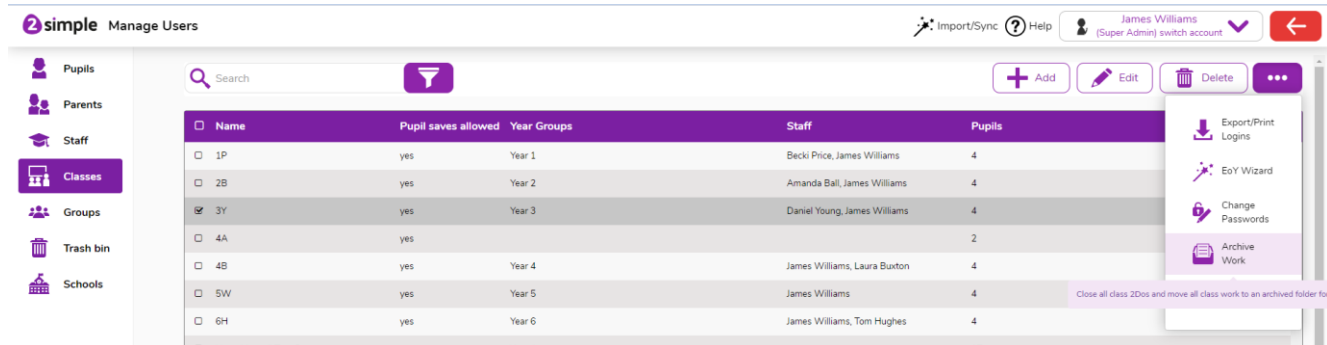
3. You will be presented with the following choices.
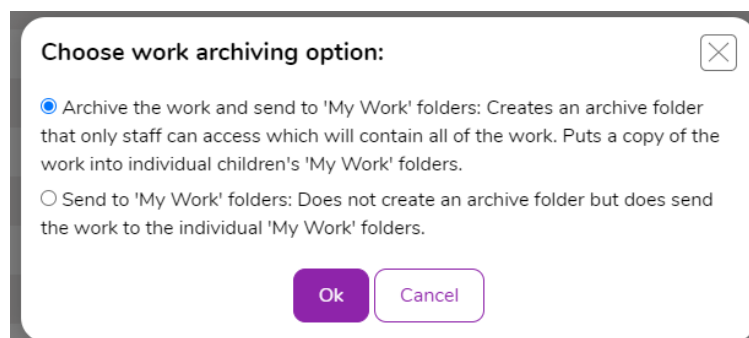
Deleting a class

1. Click 'Classes' on the left-hand menu.
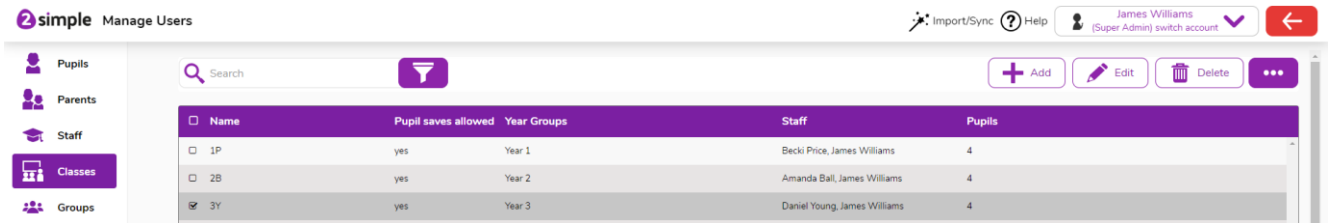
2. Click on the delete button.
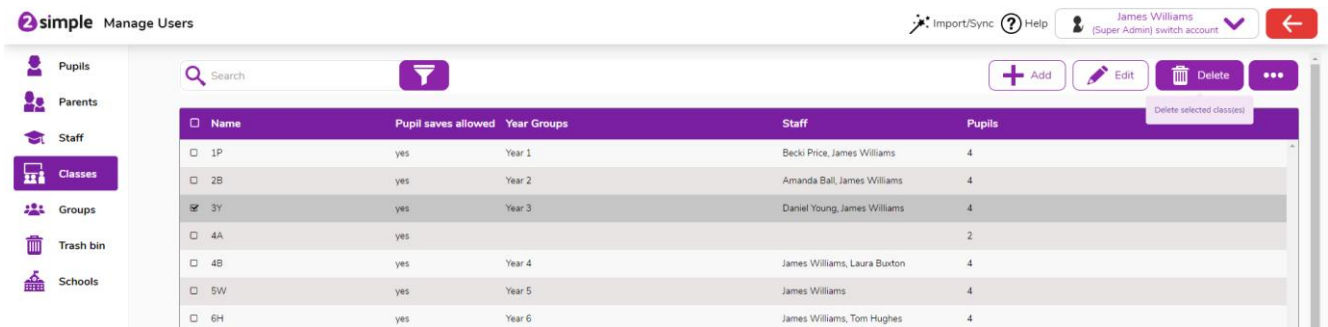
3. You will be presented with the choice to archive the class:
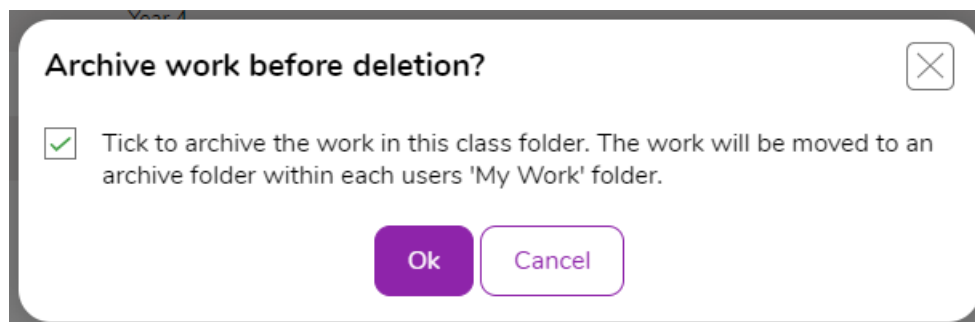
4. If you check the checkbox, then an archive folder will be created for each pupil and teacher in the My Work folder. Work created by the users, saved in the shared class folder, will be put into each user's archive folder in the contained in the 'My Work' folders. The class will be deleted. If you do not check the checkbox then the following screen will present to confirm you are wanting to delete the selected classes.
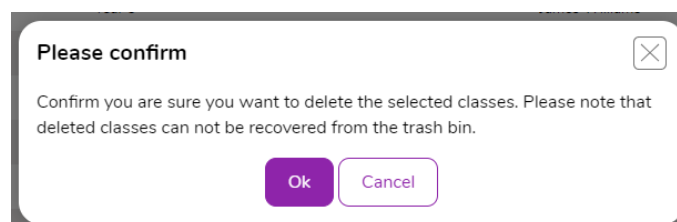
Performing the end of year process

1. You will also have an option to archive the work from shared class folders when performing the end of year migration wizard process.

How to create class login cards and export data

1. Select the classes you want to produce data for.
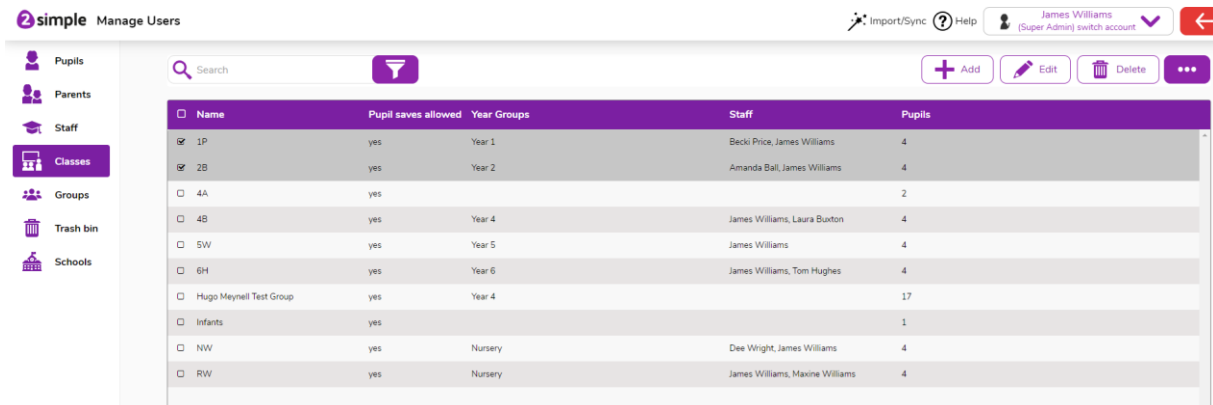
2. Click on the **purple meatball menu** button in order to expose the 'Export/Print Logins' button.
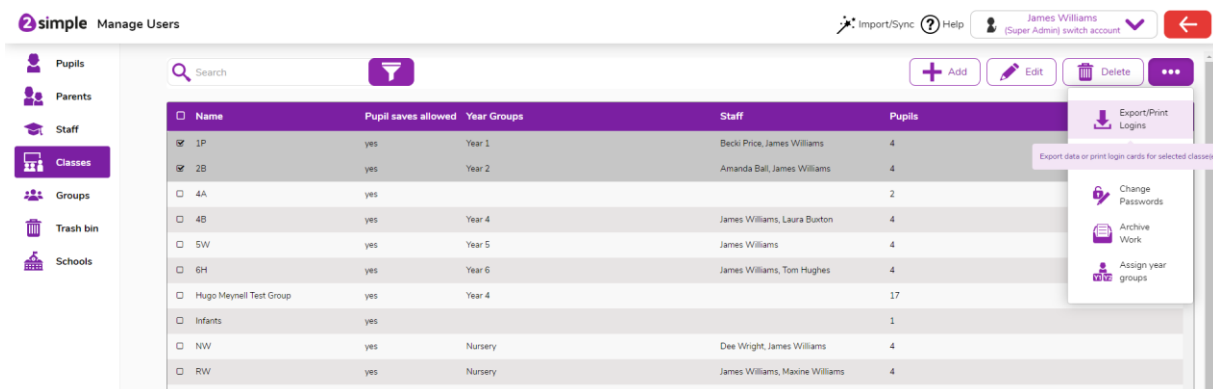
3. You will be presented with a dialogue with 3 options.

   - Produce an Excel file- This will produce a list of all the selected data.
   - Produce PDF login cards- This will produce login cards for your pupils containing their usernames and passwords.
   - Produce PDF letters- This will produce a letter to parents explaining what Purple Mash is and will contain individual pupil login details.

(There are also two further options, displayed as checkboxes to **Include Staff** and **Use Parent Code**.)

4. Select the options that you would like and click '**Ok**'.

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# Moving pupils to different classes at the end of the school year

There are three methods that can be used to move pupils to new classes and designate pupils as leavers at the end of the school year.

❷ Update automatically from your school's MIS system. Please see the section on [MIS integration](#) for this.

❷ End of Year Migration Wizard.

❷ Export the current pupil data into an excel file, update the class information and then re-import the files using the pupil import wizard.

End of Year Migration Wizard

1. Make sure each class is assigned to the correct year group. You can select a year group for a given class via the edit function in 'Classes'.

2. If names of classes are being changed or new classes are being created then create the new classes and add the teachers manually; see [How to manually add classes](#) , then use the migration wizard, as detailed below, to move the correct children into the new classes. Alternatively, move the children into the next year group's classes using the wizard as detailed below, then change the name of the classes as required and manually change the teachers.

3. Go to the Import/Sync icon in the top bar and select **EoY Wizard** from the dropdown menu. This will open the end of year migration wizard.
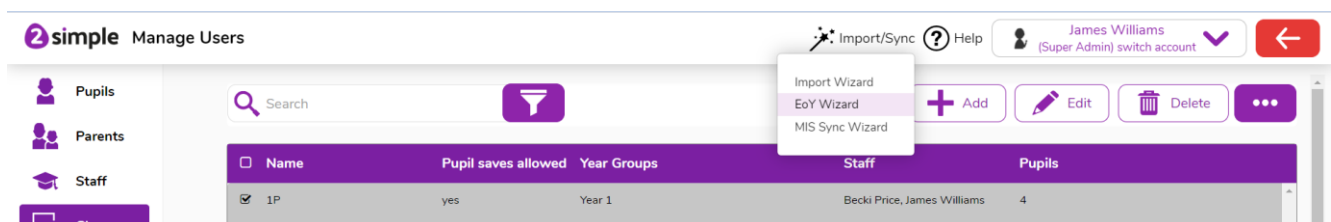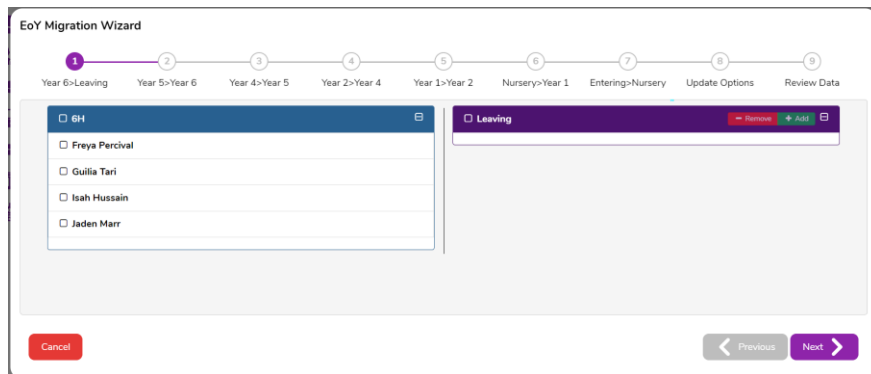
4. The wizard will open onto the classes from the highest year group. This will typically be year Select the classes with pupils that will be leaving at the end of the year by ticking the box next to the name of the class. This will select all pupils in the class. If this change does not apply to all pupils in the class, for example if you have a multi-year class, you can unselect pupils that you do not want to move. Select the appropriate classes or pupils. And then click on the green **'Add'** button. The selected users will be placed in the **'leaving'** group and will end up in the trash bin. Click **next**.
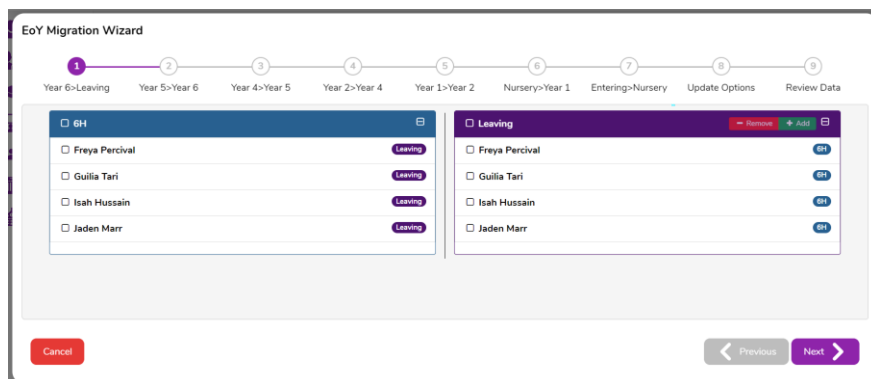
5. Continue through the process. When you have moved pupils from the lowest year group (normally nursery or reception), you will be able to select any pupils who are not assigned to classes and add them to the lowest year group.
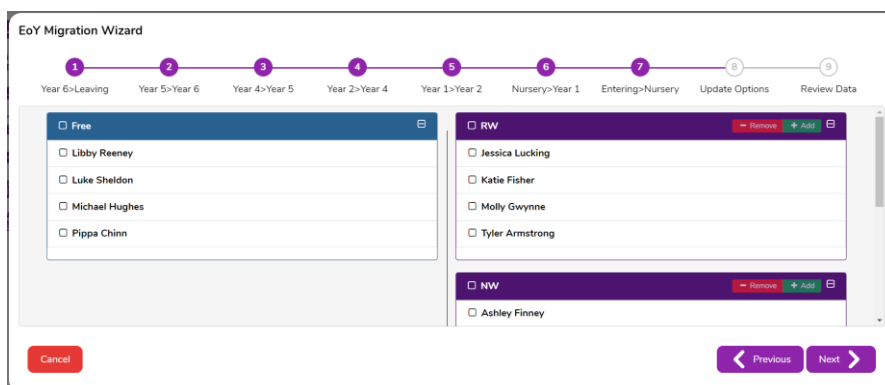
6. However, if you have not added the new pupils to the system yet, you do not need to add them this way. You can fill in the **'class'** header the import wizard and pupils created will automatically be assigned to that class.
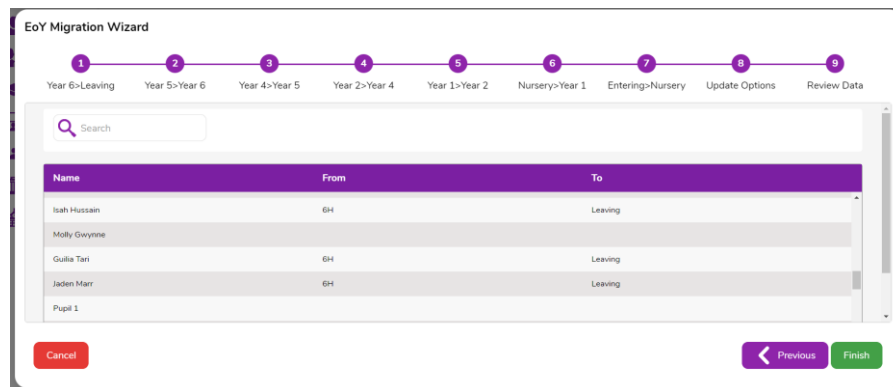
7. Review the changes and make sure you are happy with them. If you are happy, click **'Finish'**.

Moving classes using an excel export and import process

1. Click on 'Pupils' on the left-hand side to enter the pupil management screen.
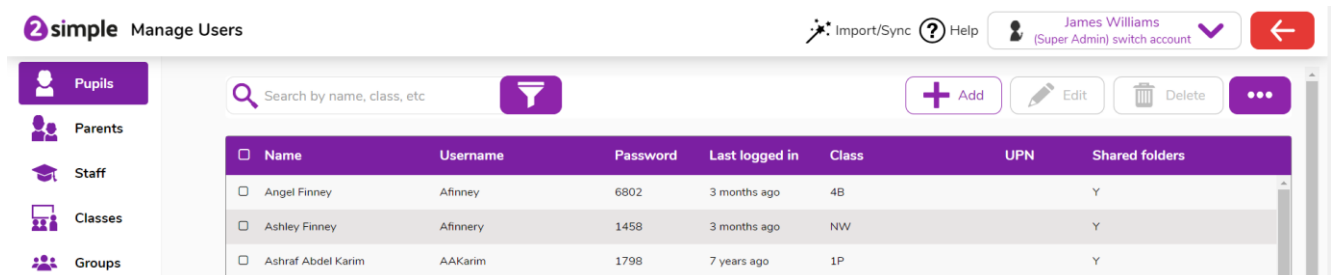
2. Click on the right-hand **purple menu** button to open up a drop-down menu. Choose to export data as an Excel list.
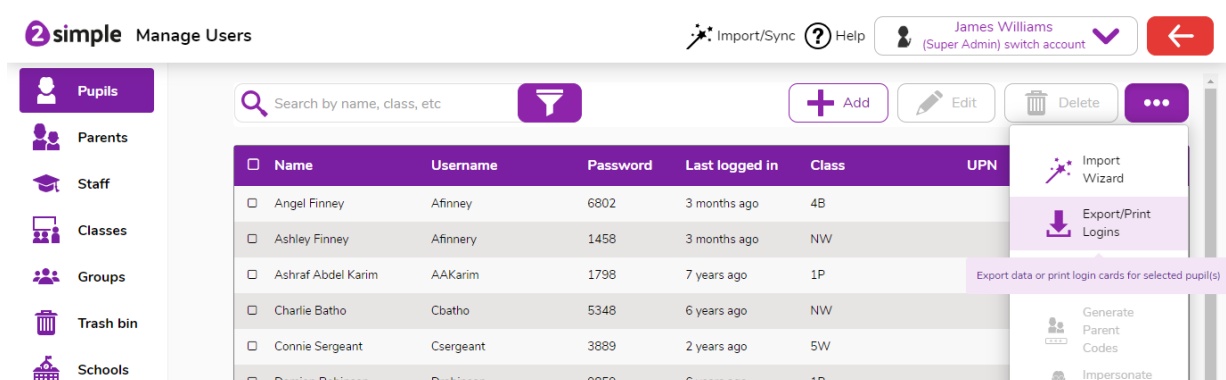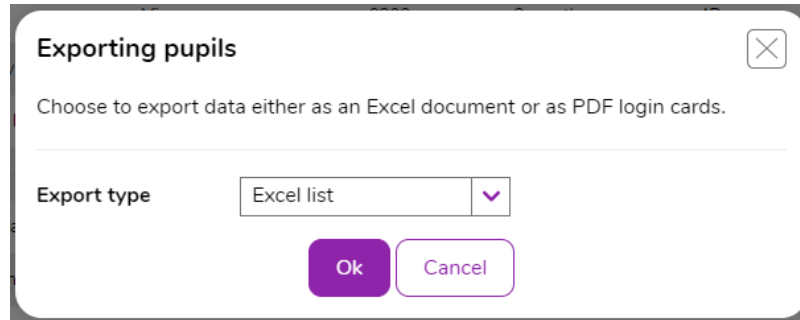
3. The excel file will be saved to your downloads folder.

Open the file in Excel. You might find it useful to sort the data by 'Classes' in order to update it. To do this you usually click on the 'Data' menu at the top then the 'Sort' button then select to sort by the column 'Classes'. The export will have exported all the fields of information but the only fields that are required are the pupil's name (either first name and last name or full name) UPN or email and the Class.

4. Update the class names to the new classes. Leavers should be given the class name #Leavers. Once the file has been updated, save it.

5. Click on 'Pupils' item on the left-hand side menu. Click on the right-hand **purple menu** button and select **Import Wizard**.
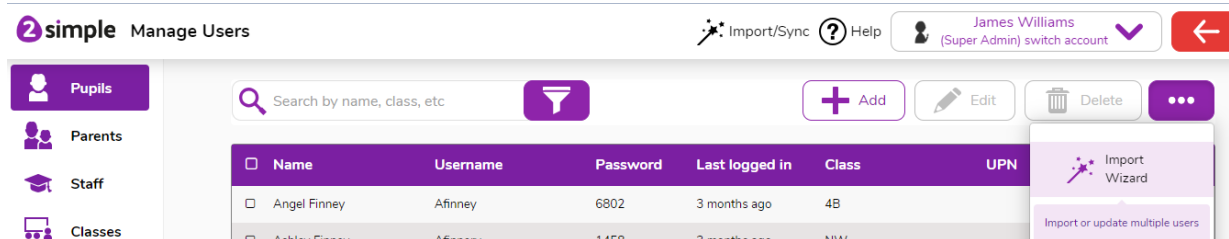
6. Click the select a file button, locate the updated file and click **Open**. Make sure that the tick box **'First row is header'** is ticked if your file has heading rows. Click the next button at the bottom right of the screen.

7. Use the drop-down boxes to select the correct headings for the data, then click the next button.

8. The importer will analyse the data and inform you of the numbers of pupils to be updated. If you are happy with the changes, click **Finish** to save.

How to mass generate new passwords for classes

You may wish to change passwords for an entire class. For example, longer passwords are becoming more appropriate for older children.

1. Select **'Classes'** on the left-hand menu. Select the class or classes for which you wish to change the pupil's passwords. You can also select all classes by selecting the uppermost checkbox, to the left of the header 'Name'.

2. Click on the **purple right hand menu** and select **'Change Passwords'** from the drop down.

There are seven different types of password you can choose to apply:

- **'Animals'**, **'Colours'** and **'Things'** generate a password that is a word followed by numbers. For example, selecting colours may generate the password red73.
- **'Picture Pin'** generates a 4 Digit Picture Password. The pictures are of a number of different animals and also correspond to 4 digits 0-9. This is an easier way for younger children to get used to remembering passwords. The pictures that make up their password will appear on their login cards.
- **'Two Digit Picture Pin'** - This generates a two digit password. This is a very simple password to remember. The password will also correspond to two pictures like the Picture Pin
- Five letter noun followed by three digits- e.g. green218
- Six letter noun followed by four digits e.g. cotton4385

4. Click **'Generate'** to set passwords and finish.

Groups

Groups are a way of organising children outside of the class structure. For example, you may create a coding club that children in multiple classes and years attend. Teachers can set up groups in their school and can invite teachers from other schools to join the group and add their own pupils.
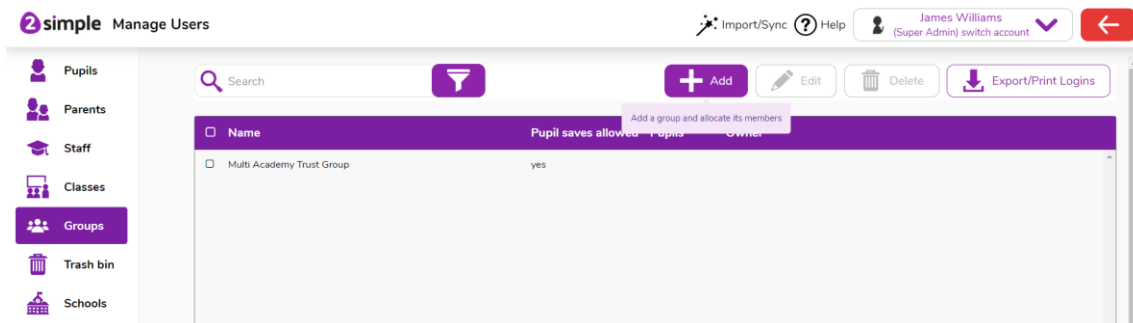
Groups can collaborate on work and save into the same shared folder.
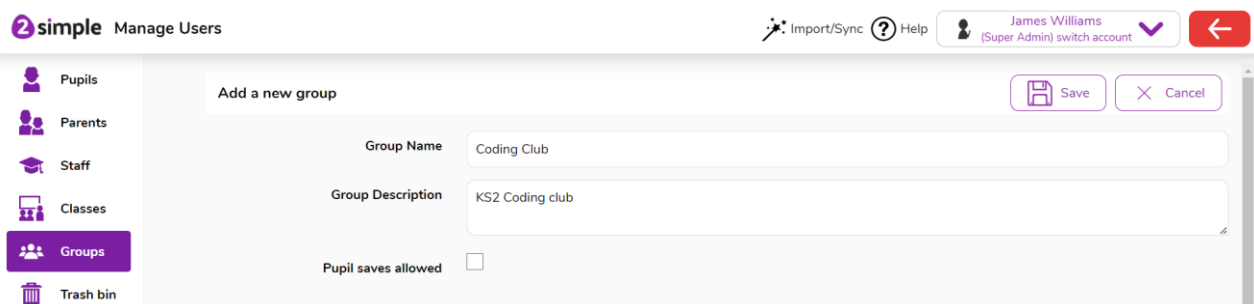
Here you will find all the information you will need to set up and manage your groups.

How to manually add groups

1. Click on **'Groups'** on the left-hand side menu. Click the **'Add'** button.

2. Add the name of the group and a description. You can then add pupils and staff to the group. Staff you do not add to the group will not be able to view pupil's work.

3. Click **'Save'** to complete.

How to manually edit groups

1. Select the group that you would like to edit and click the **'Edit'** button.
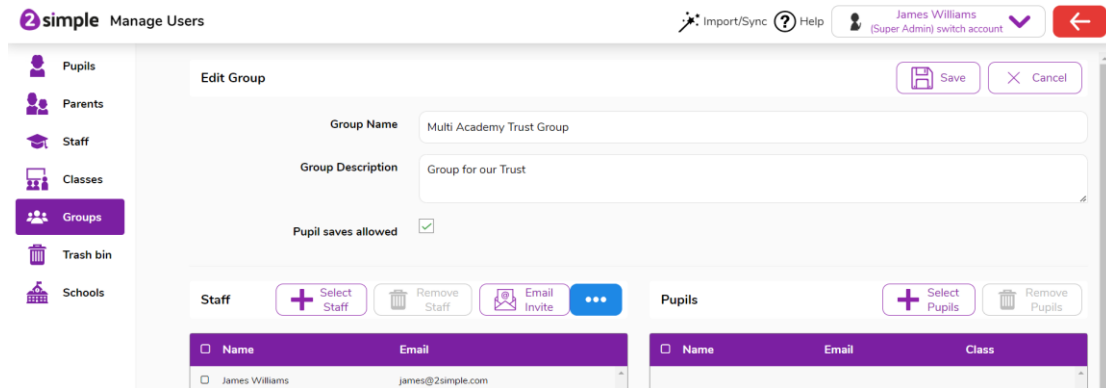

2. Here you can edit details such as the group name and description. You can also add and remove staff & pupils.
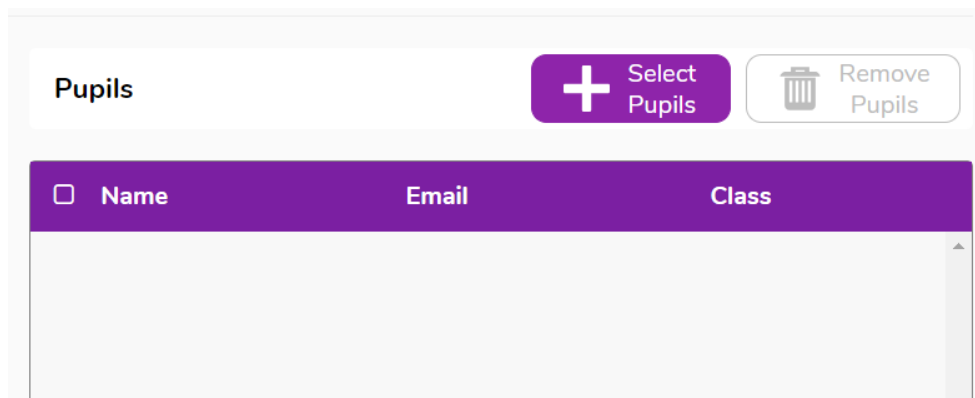

3. When you are finished making changes, click **'Save'**.
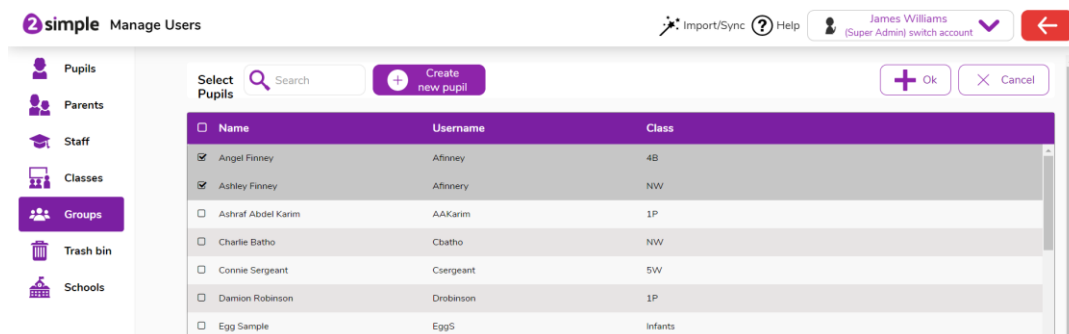
How to manually add pupils to groups

1. Select the group you wish to add pupils to. Click on the **'Edit'** button. This will open up the edit group screen:

2. Click on the **'Add Pupils'** button.

3. This will open the list of pupils. Click on the pupils you wish to add.


4. Click the **'Ok'** button to add the highlighted pupils.

5. If a pupil is not in manage users, you can add a new pupil. See Adding a pupil from the Groups area.

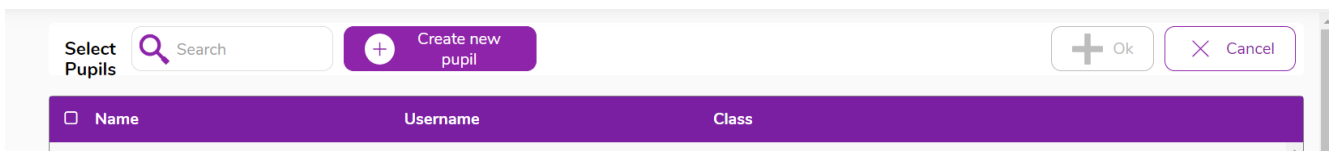6. Click the **'Save'** button in the top right to finish.

Add a pupil from the groups area

1. Open the Group editing screen for the group to which you wish to add a child to.

2. In the Pupils area on the bottom right portion of the screen, click on the **select pupils** button.
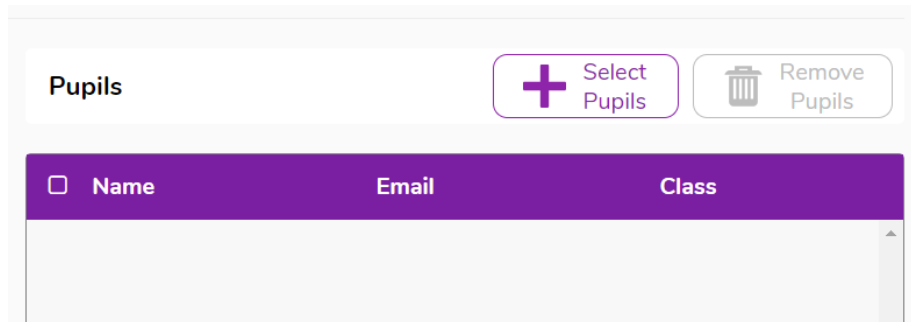
3. On the next screen click on the **'create new pupil'** button . This opens the Create new pupil screen.

4. Complete the required information Name, Username, Email or UPN, Password and Class. Click Save to complete. The pupil will be added to the school. On the Edit Class screen, click the Save button to add the new pupil to the group that you are editing.
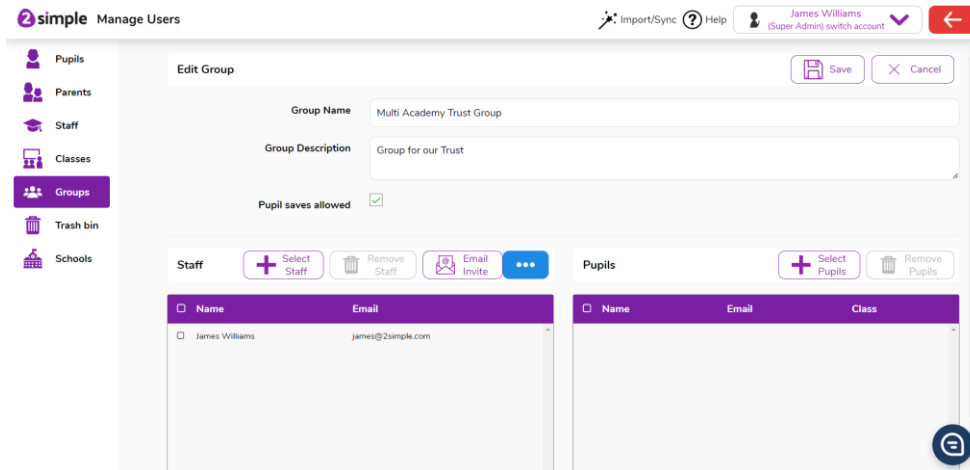
How to manually add staff to groups

This section explains how to add staff from your own school to a group. To add staff from another school see How to add users from another school to a group
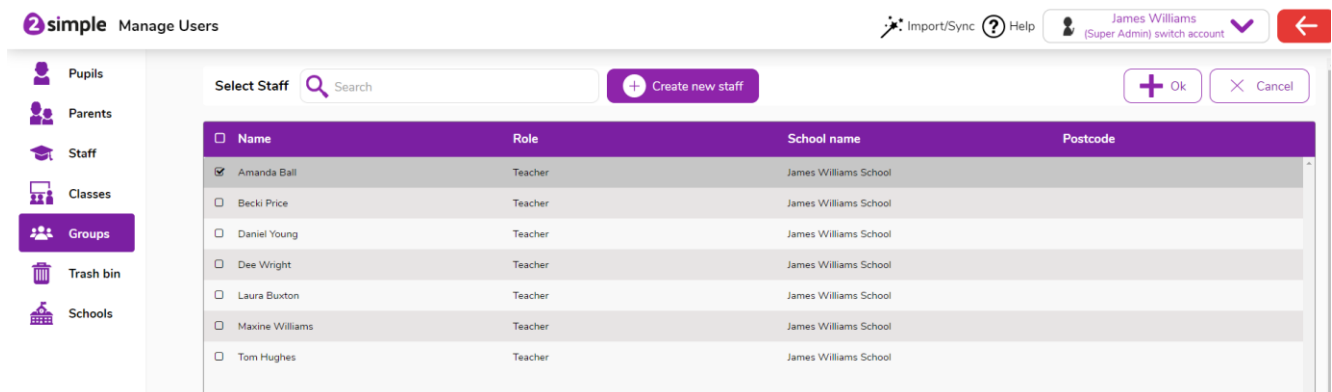
1. Select the group you wish to add staff members to. Click on the 'Edit' button. This will open up the edit group screen:

2. Click the **'Select Staff'** button. Staff members who are not added will not have access to view work for pupils in that group.
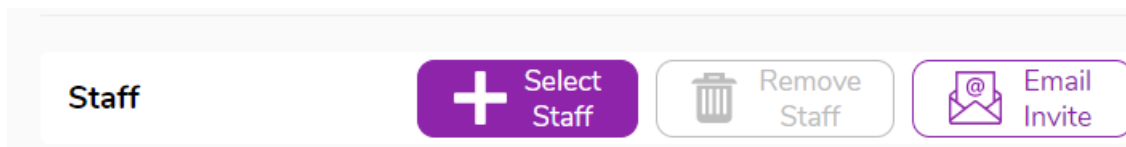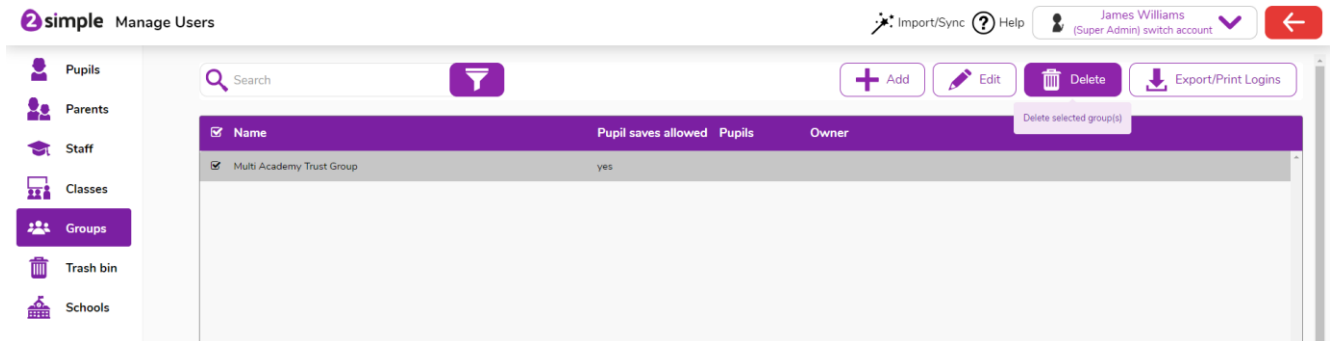
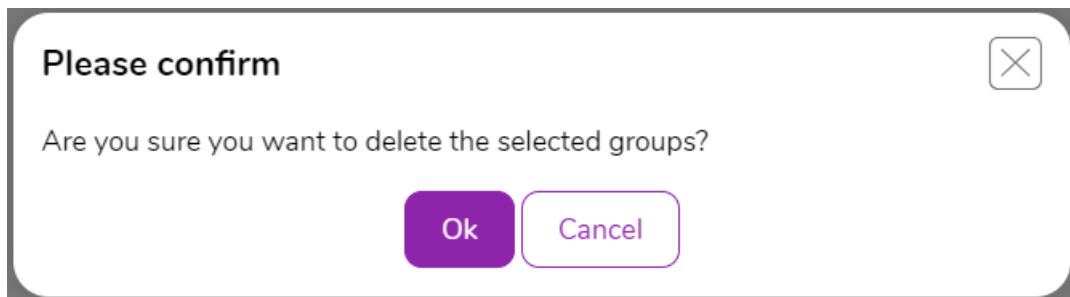

3. Tick those staff members you wish to add.

4. Click the **'Ok'** button to add the selected staff to the group.

5. Back on the **'Edit group'** screen, click the green 'Save' button in the top right to finish.

How to delete groups

1. Select the group(s) you wish to delete. Click on the **delete** button.

2. Confirm you want to delete the selected group(s).

Please note that you cannot recover deleted groups via the trash bin.

How to add users from another school to a group

You can create groups that can be used across schools. To do this, you will need to add a member of staff from another school. Once they have been added, they can add pupils from their school into the group.
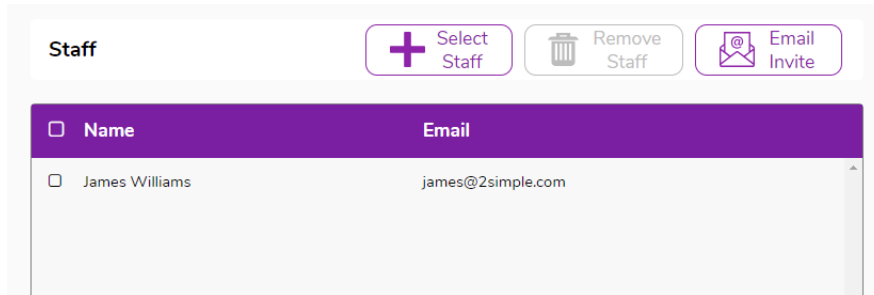
1. Select **'Groups'** from the left-hand menu.
2. Select the group you wish to add users from another school to. Click on the **'Edit'** button.
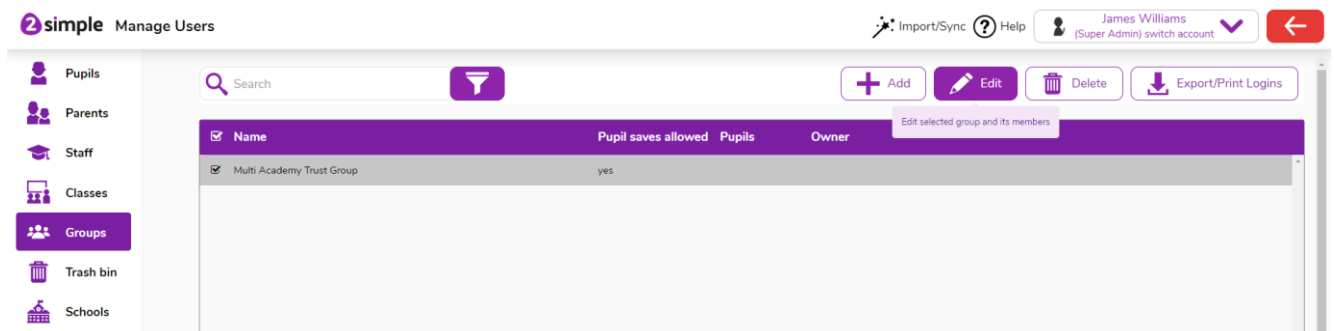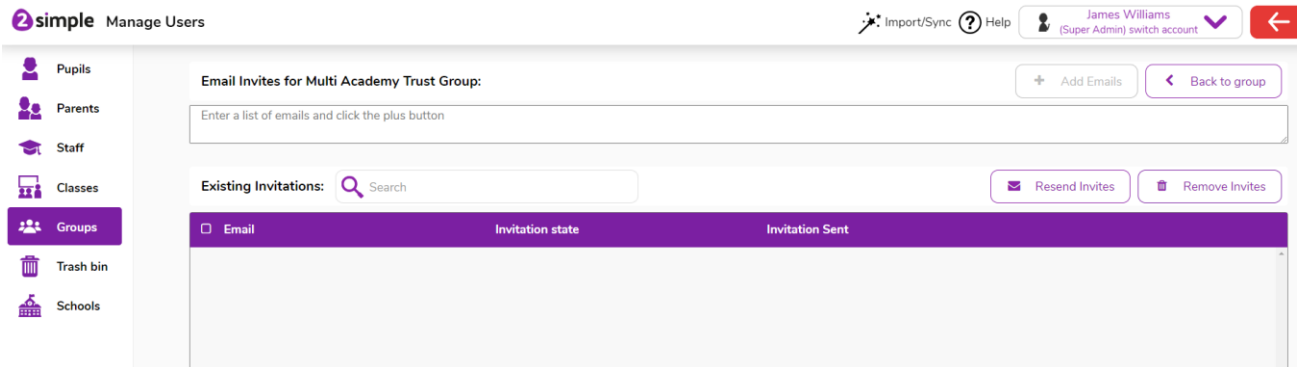

3. On the Edit Group page, click on the **'Email Invite'** button. This will open the Email Invites page. This will allow you to invite new users or manage existing invitations.

4. In the first section you can add email addresses. Multiple email addresses can be added as a comma separated list. Then click the **'Add Emails'** button to invite.


5. Any previously sent invitations and their invitation status will show in the Existing Invitations section. You can use this section to resend or remove invites.

6. As you have added a user from another school, an invitation email will be sent to that user and they will need to confirm they wish to join the group before they join. Once they have accepted the invitation, they will be able to add pupils from their school into the group.

Impersonating a different user

Manage Users includes the functionality to allow a teacher or admin to view how a platform will look as a different user. Administrators can also see a teachers view using the same method.

1. In Manage Users, select the user that you wish to impersonate. Click the `purple menu` button in the top right.
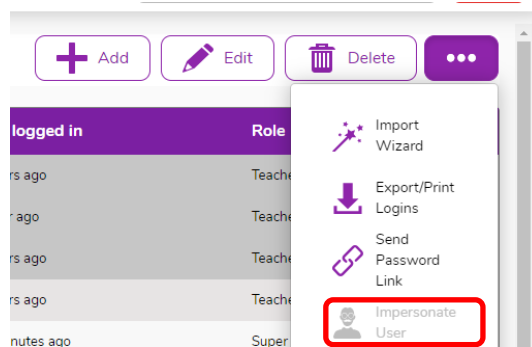
Note: The **'Impersonate User'** feature will be greyed out unless a single user has been selected.

2. Select the Impersonate User item from the menu. The platform will load as that user.

3. To return to your own login, click 'Back to user...' in the profile drop down.