



# Configuring Passport

## **SchoolMessenger**

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## Target Audience

The target audience for this document is a school district's network administrator, system administrator or someone familiar with the school district's Active Directory/LDAP infrastructure. After reading this document the aforementioned admin should be able to setup admin-level and non-admin level accounts in Passport, configure connectors and assign configured connectors to roles (teachers, students, parents, etc.)

If this document and Passport's online help does not adequately cover a topic the admin can reach support via email at [passport@schoolmessenger.com](mailto:passport@schoolmessenger.com) or if you are a Premium customer, via phone at 800-920-3897.

## Prerequisites

If you wish to synchronize accounts via your LDAP server be sure to configure your firewall to allow forwarding of requests from 52.88.255.42/32 and 52.33.34.6/32 on port 389 for non-SSL or port 636 for SSL. You'll also need to provide LDAP Domain, Host, User Name and Password information to configure the LDAP Server connection (see screen capture below).

 To allow integration with LDAP (Active Directory), configure forwarding of requests, coming to your firewall server (as defined in "Host") from 52.88.255.42/32 and 52.33.34.6/32 (IP addresses of Gateway), on ports, that correspond to values of "Port" and "SSL Port" (normally 389 and 636)

### LDAP Server Configurations

LDAP Domain:	<input type="text" value="ad.edutone.net"/>
Host:	<input type="text" value="50.200.0.27"/>
Port:	<input type="text" value="389"/>
SSL Port:	<input type="text" value="636"/>
User Name:	<input type="text" value="mypassporttest"/>
Password:	<input type="password"/>
Authentication requires SSL:	<input checked="" type="checkbox"/> ?
Allow administrators of sub organizations to use this server:	<input checked="" type="checkbox"/> ?
Email Domain Name:	<input type="text"/>
To be specified ONLY if users log-in with an email address in place of a username - a part before @ will be used for authentication with Active Directory server	
Conduct synchronization upon schedule:	<input type="checkbox"/>

## Creation of Admin Accounts

Your SchoolMessenger Project Manager will configure one Admin account and walk you through the process of logging into that Admin account. Additional Admin accounts can then be created by the initial administrator. Non-admin accounts are created via Active Directory syncs or the Upload CSV option discussed later in this document.

## Managing Organizations (Schools)

Your SchoolMessenger Project Manager will create your district-level organization and will gather information from you regarding the schools within the district that you would like to include in Passport. Passport supports the creation of organizations via an import process. A template can be downloaded by navigating to *Org Admin* → *upload CSV* → *Download Template*. Once the template spreadsheet is populated with your schools, the import is executed by clicking the “Add Files” button and selecting your completed template file. The Data Import History section of the Import Details page provides information regarding whether or not the import succeeded. You may click on the “Validation Failed” or “Successfully Provisioned” links for further information.

## Managing Users

Users can be staff (teachers and non-teachers), students, administrators, parents, etc. SchoolMessenger recommends creating users in Passport via the LDAP sync option, but it’s also possible to create and manage accounts via CSV uploads. SchoolMessenger recommends the LDAP option, because syncs can be scheduled every 12, 24 or 48 hours, which makes user account management hands-free, whereas the CSV upload option requires periodic manual updates.

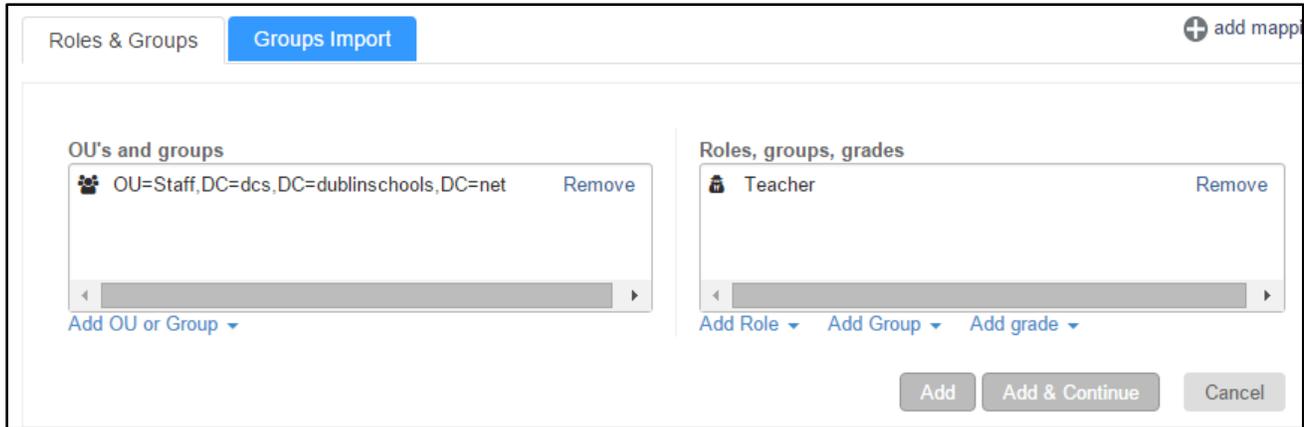
### LDAP Sync Option (Recommended)

The manner in which you setup your LDAP connection will be dictated by the types of connectors you wish to use. For example, if any of your connectors have school-specific URLs then you would need to setup your LDAP connections at the school level. If you do not have any connectors that have school-specific URLs it will be more efficient to setup the LDAP connection at the district level.

To setup the LDAP connection, complete the following steps:

1. **Navigate to *Users* → *LDAP Sync*, pick the correct Organization from the combo-box in the upper left-hand area of the screen and click the “Add Server” button.**
2. **Fill in the LDAP Domain, Host, Port, User Name and Password fields.**
3. **Check the “Requires SSL Authentication” box to secure the traffic between Passport and your network (recommended).**
4. **Check the “Allow administrators of sub organizations to use this server” box if you are configuring a connection at the district level and you would like to let school-level administrators to use this LDAP connection.**
5. **Check “Conduct synchronization upon schedule” to synchronize accounts every 12/24/48 hours.**
6. **Click the “Test connection options” link to input a user name and password for testing of the connection.**

Once the connection test is successful, use the “add mapping” option, found in the Mapping section, to assign OUs (Organizational Units) to roles. Most school districts have OUs in Active Directory for their staff, students, etc. For example, you could assign the district staff OU to the Teacher role (see screen capture below). You can assign OUs to roles, groups, grades, etc. Click the “Add & Continue” button to save your changes.



Once your Roles & Groups are set, click the “Run Sync” button to create the user accounts - then navigate to *Users* → *Users* to view the created user accounts. You can further manage users if needed by checking the box next to a user and using actions such as “send notification” and “delete” but this is usually not necessary when using the LDAP sync option.

Selected users: assign role assign group send notification delete Add user(s): single upload CSV LDAP sync

<input type="checkbox"/>	Name	Username	Location	Role(s)	Group(s)
<input type="checkbox"/>	Admin SchoolMessenger	schoolmessenger	SchoolMessenger	Admin	
<input type="checkbox"/>	Teacher SM	smteacher	SchoolMessenger	Teaching Staff	
<input type="checkbox"/>	Student SM	smstudent	SchoolMessenger	Student	
<input type="checkbox"/>	Parent SM	smparent	SchoolMessenger	Parent	
<input type="checkbox"/>	Edutone Support	edutonesupport	SchoolMessenger	Admin	

## CSV Upload Option

If you do not wish to use the recommended LDAP sync option or simply do not have Active Directory you can manage user accounts via CSV uploads. Navigate to *Users* → *Data Zone* → *Download Templates* to get file layouts for student, non-student, group and enrollment data. Groups would be used to subgroup users into something more finite than the school level (for example classes). Enrollment data is used to link students to groups. The required fields for these files are listed below.

### Student and non-student data

- User ID
- First Name
- Last Name
- Email Address (required if you wish to email login credentials to users).

### **Groups**

- Group ID
- Group Name

### **Enrollments**

- Group ID
- Student ID

## Resources (Connectors)

Once organizations and users are setup you can begin adding resources (connectors) from the Passport Marketplace to your schools.

### Adding Resources

To add a Resource follow the steps below:

1. **Go to the Resources tab in Passport, select the correct Organization, then choose the correct Role from the “Roles & groups” combo-box.**
2. **Click the “Add Resource” button.**
3. **Search the Passport Marketplace for the Connector you would like to add. Click the “explore” link to read about the Connector and view screen shots and tips for configuring it.**
4. **Return to the previous page and click the “Add to Resources” button. If you want to add the Connector for all schools in the district, pick the “For All Users” option. Pick “Per Site” then click the “Add Site” button to choose specific schools if you would like to add the Connector for certain schools.**
5. **Check the “I agree to the Terms of Use” box, then the “Activate” button to add the Connector.**
6. **When you go back to the Resources tab, you will see the new Connector in the Services window.**

### Assign/Bulk Assign Resources

Select the Resource you would like to assign. If you want to assign a single Resource to one Role choose the Assign option, then pick the Role to assign the Connector to. If you would like to assign the Resource to multiple Roles you can choose the Bulk Assign option and pick a Folder within each Role. You can also drag and drop Resources from Services to a Role instead of using the Assign option.

### Configuring Resources

Select the Resource you would like to configure. Click the Configure link and fill in the parameters for that Connector. Place your mouse cursor over the question mark box next to a field to get more information about a Connector parameter.

## Deleting Resources

Select the Resource you would like to delete and click the Delete link. Please note that the selected resource will be de-provisioned from all users with all roles when you click OK and this cannot be reversed. If you would like to delete a Resource from a single role or group, select the Resource you would like to delete and then select “remove”.

## Creating Bookmarks

If you would like to create shortcuts in Passport to other applications that your district or school uses that are not currently in the Passport Marketplace you can do that via Bookmarks. Go to the Resources tab in Passport, select the correct value from the Organization box, and then click the Add Bookmark button. Enter the Bookmark Name and URL. You can also add a custom icon for the Bookmark that students or staff might recognize. See screen captures below for examples. Once the bookmark is setup, simply drag and drop it from the Services window to the Role window. You may want to create a separate folder for shortcuts or you may decide to include all apps (including shortcuts) in the same folder.

### Bookmark

**Bookmark Name:**

**URL:**

**Icon (60x60 px):**

### Student

Show: [All](#) | [SSO App](#) | [Bookmark](#) | [Course](#)

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**My School Resources** [edit](#) | [remove](#)



Explore Learning



Spelling City

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**Shortcuts** [edit](#) | [remove](#)



ST Math