

User Access



Online System

2017 National Summer Institute

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Overview

Access to the CASAS Online System requires a **User Account** with login credentials. When your agency is initially set-up with an account in the online system, CASAS establishes one **User Account** for the person who will manage your data. This user is identified as the ET Basic (Data manager) for agencies with “basic” access to the online system, or the TE Enhanced (Data Manager) for agencies that purchase a TE license for “enhanced” access.

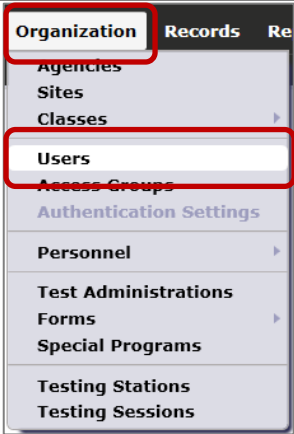
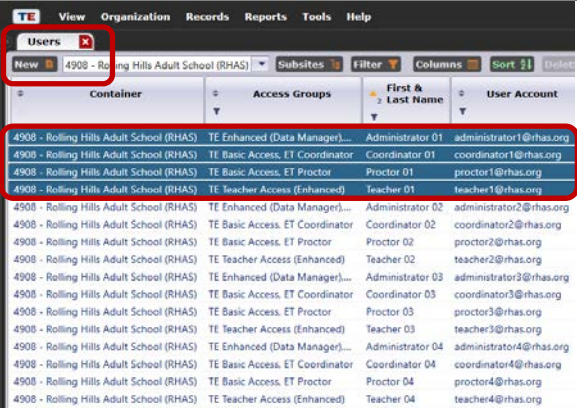
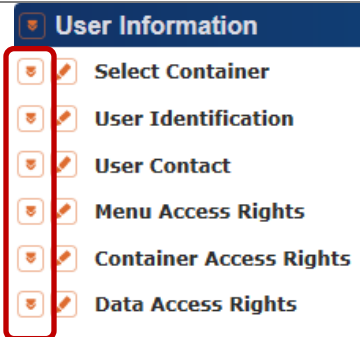
- The ET Basic or TE Enhanced data manager is responsible for adding all other **User Accounts** in your online account and granting access to TE Online and/or eTests Online.
 - Access to TE Online does not require coordinator or proctor certification.
 - Access to eTests Online does require coordinator or proctor certification.
- All **User** activity is tracked and recorded; therefore, it is important that users do not share log in credentials.
- For ease with managing users, CASAS strongly recommends placing users in access groups to avoid conflicts with individual rights. At most, a user may belong to –
 - One TOPSpro Enterprise (TE) access group that best defines their role for using TE, and
 - One CASAS eTests Online (ET) access group that matches their coordinator and/or proctor certification.
- If you find that some **Users** need rights from more than one TE access group, then it is best to create a new group to combine access rights so that **Users** are in only one TE group.
- Access to eTests Online is not automatic after someone completes coordinator or proctor certification.
 - Local program data managers are responsible for –
 - Ensuring that newly certified proctors and coordinators submit a copy of their certificate(s) to the data manager for confirmation of training completion and for record keeping.
 - Adding a **User Account** for newly certified proctors or coordinators to your online account.
 - Enabling access to eTests Online by adding the **User Account** to the appropriate access group – i.e., ET Coordinator, ET Proctor, or ET Coordinator/Proctor – upon confirmation of training completion.

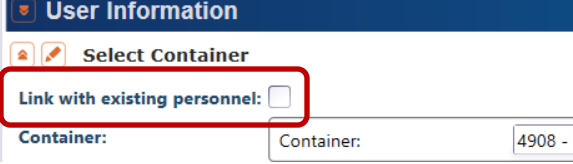
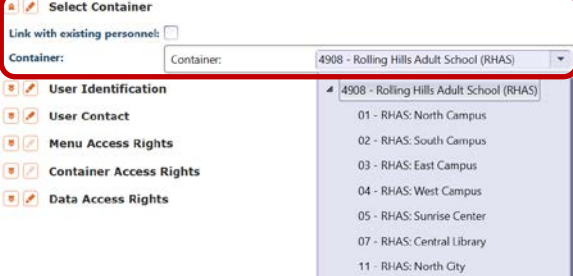
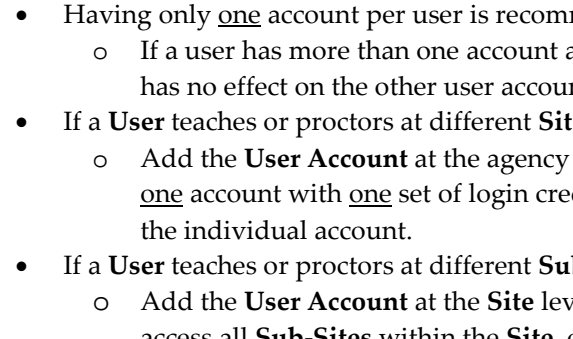
Important! All eTests Online testing personnel must adhere to the local assessment and test security policy as outlined in proctor and coordinator certification training. All testing personnel must sign a statement agreeing to uphold the test security policy and agreement.

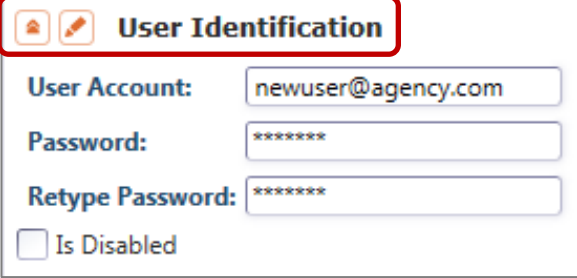
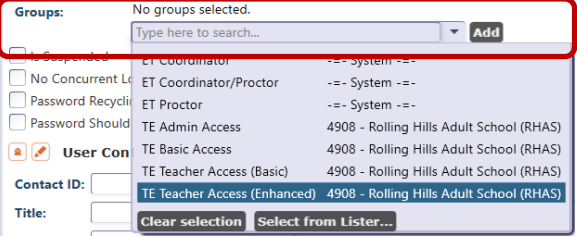

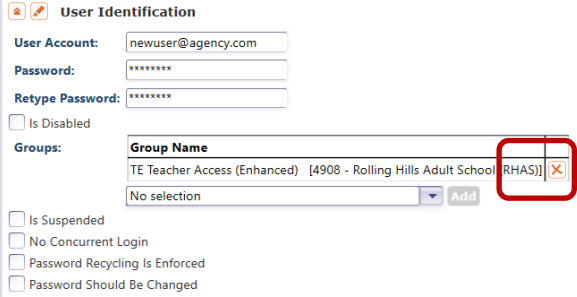
Steps to Add and Manage User Accounts

Overview

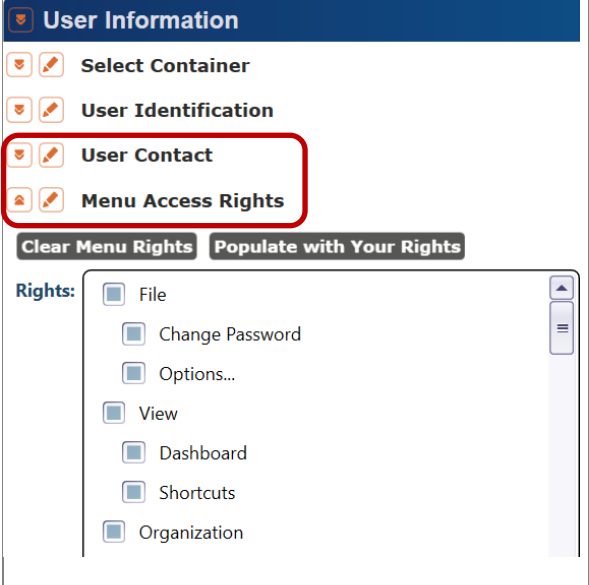



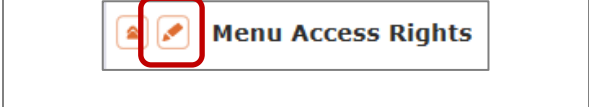
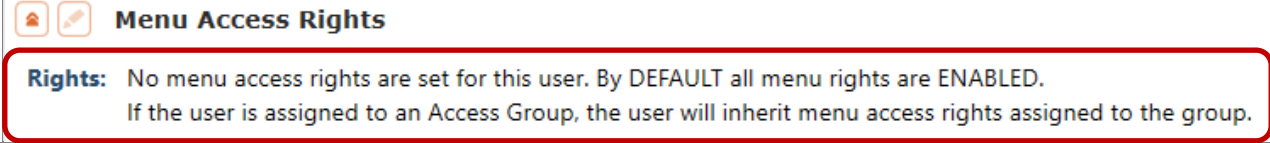
- The CASAS Online System offers **two** methods for adding **User Accounts** linked with **Personnel Records** in your online account with –
 - **TOPSpro Enterprise** through –
 - Manual** data entry, or
 - Import** from a 3rd-Party System or fillable Import Template.

| Step | Screen | Description |
|------|---|---|
| 1. |  | <ul style="list-style-type: none"> User Accounts are part of the organizational structure of your online account. From the Organization menu, <ul style="list-style-type: none"> ○ Click Users. |
| 2. |  <p>→ Go to Organization > Access Groups to view Menu and Data access per group.</p> | <ul style="list-style-type: none"> A list opens to display User records. RHAS Training: Click the Contact ID up/down-arrow to sort the list of User records in ascending order. <ul style="list-style-type: none"> ○ Take note of the four types of RHAS Users and their association in access groups. To add a new User Account, <ul style="list-style-type: none"> ○ From the Toolbar at top left, <ul style="list-style-type: none"> ▪ Click New. |
| 3. |  | <ul style="list-style-type: none"> A new tab opens to input User Information in six distinct sections. To introduce you to each section while adding a new User Account, scroll through the record and – <ul style="list-style-type: none"> ○ Click arrow icons at left to collapse each section. |

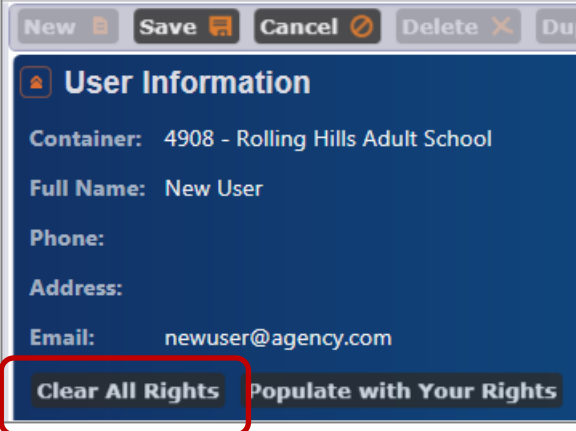
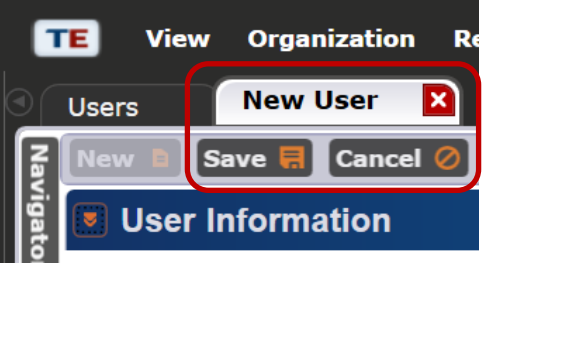
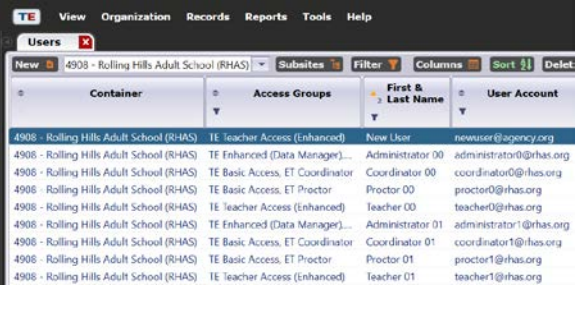
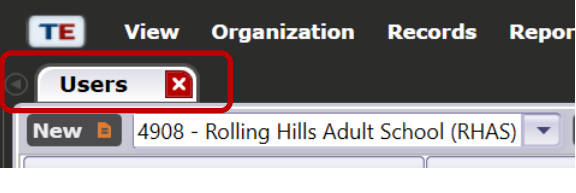
| Step | Screen | Description |
|------|---|---|
| 4. |  <p>Note! When linking User Accounts with Personnel Records for Teachers (or vice versa), you have the option to restrict teacher access to their own classes.</p> | <ul style="list-style-type: none"> Click the arrow icon at left of Select Container and <u>expand</u> the section. When a Personnel Record exists in your online account, <ul style="list-style-type: none"> Check Link with existing personnel. When a Personnel Record does <i>not</i> exist in your online account, you will have the option to link accounts at a later time. |
| 5. |  | <ul style="list-style-type: none"> You have the option to add User Accounts at the <u>Agency</u> (top level) or at the <u>Site</u> level. <ul style="list-style-type: none"> Adding User Accounts at the Agency level is recommended for ease with managing users across multiple Sites. RHAS Training: Keep User at <u>Agency</u> level. |
| 6. | <ul style="list-style-type: none"> Because the online system is a <i>relational</i> database – | <ul style="list-style-type: none"> Accounts at the Agency level, or in the parent container, have access to information in all child containers unless otherwise specified in Container Access Rights. Accounts at the Site-level, or in a child-container, will <i>only</i> have access to information at the Site and any Sub-Sites within the child container. |
| 7. | | |
| 8. |  | <ul style="list-style-type: none"> Click the arrow icon at left of Select Container to <u>collapse</u> the section, and then Click the arrow icon at left of User Identification to expand the section as we continue. Each User Account has its own User Identification, or “unique” set of log in credentials. |
| 6. | | <ul style="list-style-type: none"> Having only <u>one</u> account per user is recommended to avoid confusion with multiple logins. <ul style="list-style-type: none"> If a user has more than one account and changes the password with one of those accounts, this has no effect on the other user account(s). If a User teaches or proctors at different Sites, the recommendation is to – <ul style="list-style-type: none"> Add the User Account at the agency level, or in the parent container, so that the user has only <u>one</u> account with <u>one</u> set of login credentials, and then specify the Container Access Rights on the individual account. If a User teaches or proctors at different Sub-Sites, the recommendation is to – <ul style="list-style-type: none"> Add the User Account at the Site level so that the user has only <u>one</u> set of login credentials to access all Sub-Sites within the Site, or child container. |

| Step | Screen | Description |
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| 7. |  <p>Note!</p> <ul style="list-style-type: none"> ET Basic and TE Enhanced data managers may reset passwords. Users may also change their own password at any time in TE and in eTests Online. You may Disable a User account at any time without deleting the account if you anticipate re-enabling access in the future. | <ul style="list-style-type: none"> The User Account and Password comprise log in credentials issued by the <i>ET Basic</i> or <i>TE Enhanced</i> data manager for access to <i>eTests Online</i> or <i>TE</i>. <ul style="list-style-type: none"> Enter a <u>work-related</u> e-mail address as the user name (recommended). Enter a temporary Password. <ul style="list-style-type: none"> Users are prompted to change their password at first log in. RHAS Training: Add a new User Account for YOU. <ul style="list-style-type: none"> Enter <u>your</u> work-related e-mail for the User Account name and a temporary password. Note! Your information is deleted when the <i>RHAS</i> database is reset. |
| 8. |  <p>Remember! At most, Users can <u>only</u> be in <u>one</u> ET and <u>one</u> TE Access Group.</p> | <ul style="list-style-type: none"> To add the User to an Access Group, <ul style="list-style-type: none"> Click the Group field down-arrow, and select an Access Group using one of <u>two</u> methods. <ol style="list-style-type: none"> Type to search Select from Lister RHAS Training: Add your new user record to the TE Teacher Access (Enhanced) group. |
| 9. |  | <ul style="list-style-type: none"> After selecting an Access Group, then <ul style="list-style-type: none"> Click Add at right of the selected Group. |
| 10. |  | <ul style="list-style-type: none"> RHAS Training: For information only. You may remove Users from Access Groups – <ul style="list-style-type: none"> From the User Account, or From the Access Group. To do this from the User Account, <ul style="list-style-type: none"> Click the Red X Box at right of the Group Name. |

| Step | Screen | Description |
|------|---|---|
| 11. | | <ul style="list-style-type: none"> • RHAS Training: For information only. • Other Authentication settings may be enforced such as <ul style="list-style-type: none"> ○ Suspending an account after a specified number of attempts to log in. ○ Not allowing Concurrent logins, and ○ Changing passwords periodically. |
| 12. | <p>Note!</p> <ul style="list-style-type: none"> • Contact ID may match the contact record at CASAS or the contact record at the agency. • Additional contact information may be added as required by the agency. | <ul style="list-style-type: none"> • Click the arrow icon at left of User Identification to <u>collapse</u> the section, and then • Click the arrow icon at left of User Contact to expand the section as we continue. • Each User Account has its own User Identification, or “unique” set of log in credentials. • Add the <u>minimum</u> Contact Information required for new User Accounts. <ul style="list-style-type: none"> ○ First Name. ○ Last Name. ○ Email • RHAS Training: Enter <u>your information</u> Don't Worry! All information will be deleted after this session. |
| 13. | <p>Note! ↑ If ever a User experiences conflicts with access, use the Clear All Rights button from the individual User Account. This will reset the account so that the User inherits all Menu and Data access from Access Groups (recommended).</p> | <ul style="list-style-type: none"> • After <u>minimum</u> Contact Information is entered with the User as a member of Access Group(s), the recommendation is to Save the new record without any further set up. <ul style="list-style-type: none"> ○ Click Save from the Toolbar at top of the new User Information record. • After saving the new User Account without any further set up, <ul style="list-style-type: none"> ○ The new user will <u>inherit</u> Menu and Data access enabled for the Group(s) in which the user is a member. <p>Remember! Access Groups help you efficiently and effectively manage users and optimizes system performance!</p> |

| Step | Screen | Description |
|------|---|--|
| 14. |  | <ul style="list-style-type: none"> • RHAS Training: The remainder of this tutorial is <i>only</i> for your review and not for editing. • Click the arrow icon at left of User Contact to <u>collapse</u> the section, and then • Click the arrow icon at left of Menu Access Rights and <u>expand</u> the section. • <i>TE</i> uses a three-state model for settings. <ul style="list-style-type: none"> Inherited →  ← (Recommended) Enabled →  Disabled →  |
| 15. | <ul style="list-style-type: none"> • If you have a User who needs access to a Menu <u>not</u> granted to the Access Group in which the User is a member, <ul style="list-style-type: none"> ○ You may augment the <u>individual User Account</u> to override the Group setting and grant the User access by checking a box to enable access. | <ul style="list-style-type: none"> • To disable access to certain Menus granted to the Access Group in which the User is a member, <ul style="list-style-type: none"> ○ You may augment the <u>individual User Account</u> to override the Group setting and deny the User access by clearing the box from shading or a check. |
| 16. |  | <ul style="list-style-type: none"> • Click the Edit icon and change Menu Access Rights to View mode. |
| 19. | <p>↓ The message (below) displays in View mode to provide detailed information about Menu Access Rights for the User Account (recommended setting).</p>  | |
| 20. | <p>↑ If the User is <u>placed</u> in an Access Group (recommended) –</p> <ul style="list-style-type: none"> ○ The User <u>will inherit</u> access to Menus assigned to the Access Group. <p>Note! This is the recommended state for optimal system performance and user management!</p> | <p>↑ If the User is <u>not placed</u> in an Access Group –</p> <ul style="list-style-type: none"> ○ The User <i>will</i> have access to <u>all</u> Menus. <p>Note! Users may experience conflicting access rights if settings are applied to the individual account <u>and</u> the User is in a <i>TE</i> Access Group. To resolve, Clear All Rights for the User to inherit rights from the Access Group.</p> <ul style="list-style-type: none"> • Click arrow icon at left of Menu Access Rights to <u>collapse</u> the section as we continue. |

| Step | Screen | Description | | | | | | | | | | | | | | | | | | |
|--------------------|---|---|--------------|-------------|----------|--------------------------|--------------------------|---------------|--------------------------|--------------------------|-------|--------------------------|--------------------------|-------------------|--------------------------|--------------------------|-----------------|--------------------------|--------------------------|--|
| 21. | <p>The screenshot shows the 'User Information' screen. A red box highlights the 'Container Access Rights' section. Below it are buttons for 'Clear Container Rights' and 'Populate with Your Rights'. A list of rights is shown with checkboxes: 4908 - Rolling Hills Adult School (RHAS), 01 - RHAS: North Campus, 02 - RHAS: South Campus, and 03 - RHAS: East Campus.</p> | <ul style="list-style-type: none"> • RHAS Training: The following is <i>only</i> for your review and not for editing. • Click the arrow icon at left of Menu Access Rights to <u>collapse</u> the section, and then • Click the arrow icon at left of Container Access Rights and <u>expand</u> the section. • By default, <u>all</u> Container Access Rights are enabled. <ul style="list-style-type: none"> ○ You may specify access to data containers on User Accounts or in Access Groups (recommended). | | | | | | | | | | | | | | | | | | |
| 22. | <p>The screenshot shows the 'User Information' screen with 'Data Access Rights' highlighted in red. Below it are buttons for 'Clear Data Access Rights' and 'Populate with Your Rights'. There are sections for 'Supplemental Data Access Rights', 'Role Access Rights', and 'Personal Information Access Rights', each with an 'Add Access Right' button. A 'Record Type Rights' table is also visible.</p> <table border="1" data-bbox="472 1150 841 1276"> <thead> <tr> <th>List / Record Type</th> <th>List Records</th> <th>View Record</th> </tr> </thead> <tbody> <tr> <td>Agencies</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Program Years</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Sites</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Class Definitions</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Class Instances</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> | List / Record Type | List Records | View Record | Agencies | <input type="checkbox"/> | <input type="checkbox"/> | Program Years | <input type="checkbox"/> | <input type="checkbox"/> | Sites | <input type="checkbox"/> | <input type="checkbox"/> | Class Definitions | <input type="checkbox"/> | <input type="checkbox"/> | Class Instances | <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • RHAS Training: The following is <i>only</i> for your review and not for editing. • Click the arrow icon at left of Container Access Rights to <u>collapse</u> the section, and then • Click the arrow icon at left of Data Access Rights and <u>expand</u> the section. • Click the Edit icon and change Data Access Rights to View mode. |
| List / Record Type | List Records | View Record | | | | | | | | | | | | | | | | | | |
| Agencies | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Program Years | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Sites | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Class Definitions | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| Class Instances | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | |
| 23. | <p>↓ A similar message displays (below) to provide detailed information about Data Access Rights for the User Account – but there is a difference!</p> <p>The screenshot shows the 'Data Access Rights' screen. A red box highlights the 'Record Type Rights' section, which contains the following text: 'No access rights to individual record types are set for this user. By DEFAULT all data access rights are DISABLED. If the user is assigned to an Access Group, the user will inherit data access rights assigned to the group.'</p> | | | | | | | | | | | | | | | | | | | |
| | <ul style="list-style-type: none"> • If the User is <u>placed</u> in an Access Group (recommended) – <ul style="list-style-type: none"> ○ The User <u>will inherit access</u> to data assigned to the group. <p>Note! This is the recommended state for optimal system performance and user management!</p> | <ul style="list-style-type: none"> • If the User is <u>not placed</u> in an Access Group. <ul style="list-style-type: none"> ○ The User <u>will not have access</u> to any data. | | | | | | | | | | | | | | | | | | |

| Step | Screen | Description |
|------|---|--|
| 24. |  | <ul style="list-style-type: none"> • RHAS Training: For review only. • If a User encounters problems with access to Menus and Data in TE, this may be due to conflicts between rights enabled on the individual account and rights enabled in an Access Group. • Remember! There is a remedy. • From the header of the User Information record, <ul style="list-style-type: none"> ◦ Click Clear All Rights, and then • As long as the User is in an Access Group, there will not be conflicts with Menu and Data Access Rights! • You can probably understand by now why CASAS <u>strongly recommends</u> that you manage Users through Access Groups! |
| 25. |  | <ul style="list-style-type: none"> • RHAS Training: Save the new User Account. • After information for the new User Account is entered, <ul style="list-style-type: none"> ◦ Click Save from the Toolbar at the top. • To close the new User Information record, <ul style="list-style-type: none"> ◦ Click the Red X Box at top on the User Information tab. |
| 26. |  | <ul style="list-style-type: none"> • The new User Account now displays in the list of User records. • RHAS Training: You should see your User Account in the list of User records. <ul style="list-style-type: none"> ◦ Use a Filter from any column if needed to find your account. |
| 27. |  | <ul style="list-style-type: none"> • To close the Users list of records, <ul style="list-style-type: none"> ◦ Click the Red X Box at top on the Users tab. |

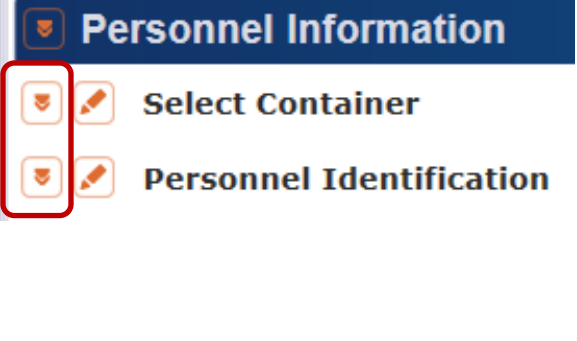
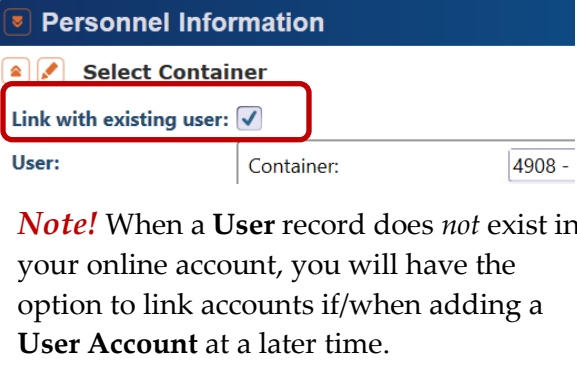
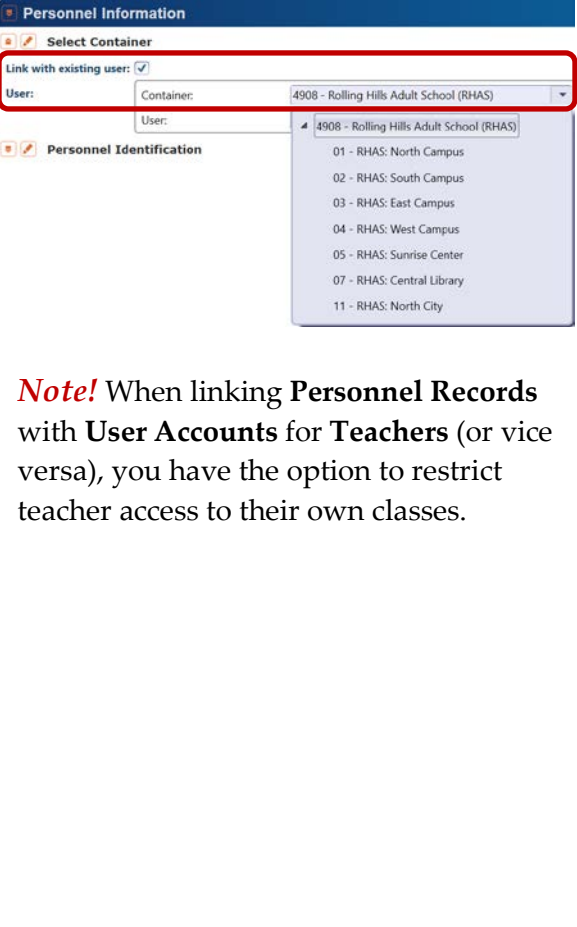
Steps to Add and Link Personnel Records

Overview

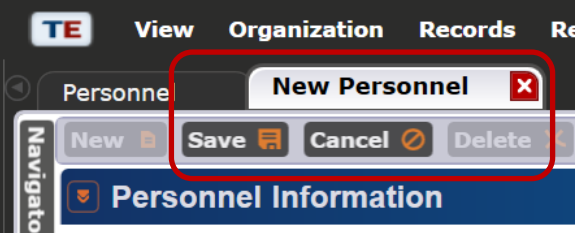

- The CASAS Online System offers **two** methods for adding **Personnel Records** linked with **User Accounts** in your online account.
 - With **TOPSpro Enterprise** through –
 1. **Manual** data entry, or
 2. **Import** from a **3rd Party System**, or fillable **Import Template**.
- **Personnel** records identify, by function and job status, who is involved in the administration and teaching of adult learners, including information about teacher years of experience and certification.

Personnel Registration

| Step | Screen | Description |
|------|--------|---|
| 1. | | <ul style="list-style-type: none"> • Personnel records are manually added <ul style="list-style-type: none"> ○ From the Organization menu, and ○ Selecting Personnel. • Each personnel record includes – <ul style="list-style-type: none"> ○ Registration, ○ Employment Records, ○ Functional Roles, and ○ Professional Status information. |
| 2. | | <ul style="list-style-type: none"> • To add a new Personnel record, <ul style="list-style-type: none"> ○ Click Registration. |
| 3. | | <ul style="list-style-type: none"> • A list opens to display Personnel records in your online database. • To add a new Personnel Registration record, <ul style="list-style-type: none"> ○ From the Toolbar at top left of the list, <ul style="list-style-type: none"> ▪ Click New. |

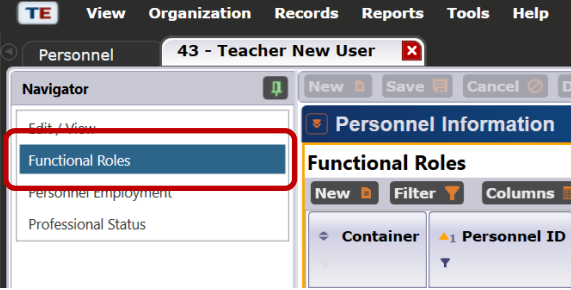
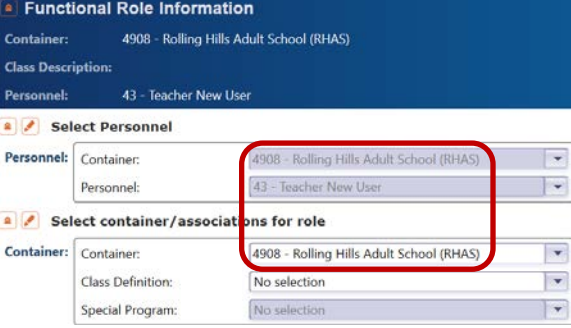
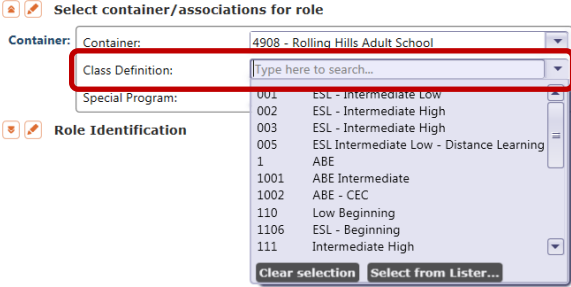
| Step | Screen | Description |
|------|--|---|
| 4. |  | <ul style="list-style-type: none"> • A new tab opens to input Personnel Information in two distinct sections. • To introduce you to each section while adding a new Personnel Record, <ul style="list-style-type: none"> ◦ Click arrow icons at left to <u>collapse</u> each section. |
| 5. |  <p><i>Note!</i> When a User record does <i>not</i> exist in your online account, you will have the option to link accounts if/when adding a User Account at a later time.</p> | <ul style="list-style-type: none"> • Click the arrow icon at left of Select Container and <u>expand</u> the section. • When a User record exists in your online account, <ul style="list-style-type: none"> ◦ Check Link with existing user. • RHAS Training: <u>Check to Link the Personnel record with your newly added User record.</u> |
| 6. |  <p><i>Note!</i> When linking Personnel Records with User Accounts for Teachers (or vice versa), you have the option to restrict teacher access to their own classes.</p> | <ul style="list-style-type: none"> • You have the option to add Personnel Records at the Agency level or parent container (recommended), or at the Site level. <ul style="list-style-type: none"> • Adding Personnel Records at the Agency level is recommended for ease with managing users across multiple Sites. • RHAS Training: <u>Keep User at Agency level.</u> • <i>Note!</i> If an Personnel member fulfills roles at different Sites, or Sub-Sites, the recommendation is to – <ul style="list-style-type: none"> • Add the Personnel Record at the agency level, or in the parent container, so that the record may be: <ul style="list-style-type: none"> ▪ Assigned Functional Roles at multiple Sites and Sub-Sites, and ▪ Linked to a User Account (also at the Agency level or in the parent container) with access to multiple Sites and Sub-Sites. |


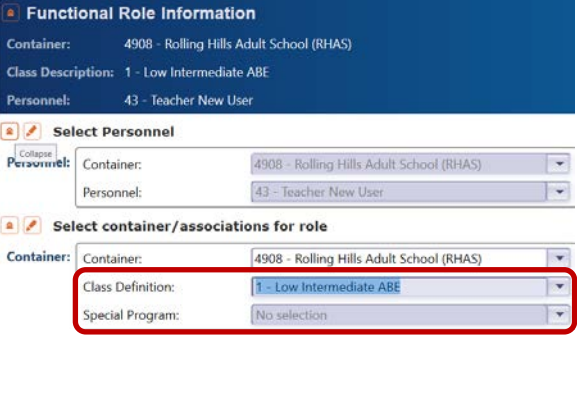
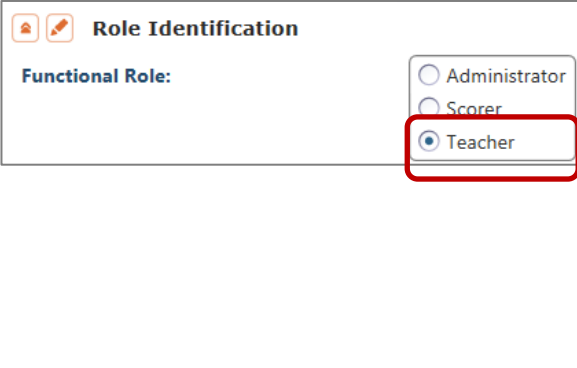
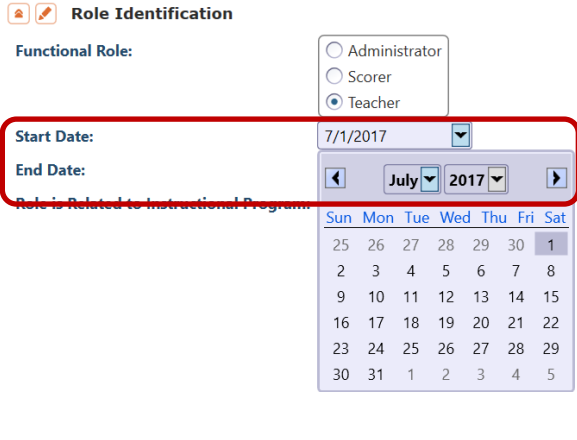
| Step | Screen | Description |
|------|--|--|
| 7. | | <ul style="list-style-type: none"> To link with an existing User Account, <ul style="list-style-type: none"> Click the User field down-arrow and either – <ul style="list-style-type: none"> Type to search, or Click Select from Lister to pick from the list of User Account records. RHAS Training: Select <u>your</u> newly added User Account record. |
| 8. | | <ul style="list-style-type: none"> If you Select from Lister – <ul style="list-style-type: none"> The list of User records displays all User Accounts available at the Agency level, or in parent container. Click the Filter icon in a column, <ul style="list-style-type: none"> Enter filter information, and <ul style="list-style-type: none"> Click Ok |
| 9. | | <ul style="list-style-type: none"> Click to highlight the User you want to select. RHAS Training: Select <u>your</u> newly added User Account record. From the Toolbar above column headers, <ul style="list-style-type: none"> Click Pick. |
| 10. | | <ul style="list-style-type: none"> The User selected, or picked, displays in the User field of the Personnel Information record. |
| 11. | <ul style="list-style-type: none"> RHAS Training: Use <u>your</u> training # for your Personnel ID. | <ul style="list-style-type: none"> Click the arrow icon at left of Personnel Identification and <u>expand</u> the section. Notice also that Personnel Identification fields auto-populate with the selected User Account information. All that remains to add is a Personnel ID. <ul style="list-style-type: none"> Enter a Personnel ID assigned by the Agency.* |

| Step | Screen | Description |
|------|---|--|
| 12. |  | <ul style="list-style-type: none"> • RHAS Training: Save the New Personnel record. • After information for the new Personnel Registration record is entered, <ul style="list-style-type: none"> ○ Click Save from the Toolbar at the top. • To close the new Personnel Registration record, <ul style="list-style-type: none"> ○ Click the Red X Box at top on the User Information tab. |
| 13. |  | <ul style="list-style-type: none"> • The new Personnel Registration record screen splits to display – <ul style="list-style-type: none"> ○ Personnel Information at the right. ○ Navigator at left to add and access related records for the Personnel member. |

Functional Roles

- The first related record to add for the new **Personnel** member is information about **Functional Roles**.
- **Functional Roles** identify who is involved in the administration, scoring, and teaching of adult learners.
- **Personnel** members may have more than one **Functional Role** within the agency.

| Step | Screen | Description |
|------|--|---|
| 1. |  <p><i>*Note!</i> Using the Navigator to add “child” records that are related to the “parent” record is the recommended approach to ensure data entry accuracy and avoid errors.</p> | <ul style="list-style-type: none"> • From Navigator at left of the Personnel Information record, <ul style="list-style-type: none"> ○ Click Functional Roles. • To add a Functional Role for the personnel member, <ul style="list-style-type: none"> ○ Click New at right. |
| 2. |  | <ul style="list-style-type: none"> • A new tab opens to input Functional Role Information in three sections. <ol style="list-style-type: none"> 1. Personnel information, 2. Container to associate the role, and 3. Role Identification. • Notice that Personnel and Container fields auto-populate when using the Navigator to add related records. |
| 3. |  | <ul style="list-style-type: none"> • To link the Personnel member with a Class, <ul style="list-style-type: none"> ○ Click the Class Definition field down-arrow and either – <ul style="list-style-type: none"> ▪ Type to search, or ▪ Click Select from Lister to pick from the list of Class Definition records. • RHAS Training: Select from Lister. |

| Step | Screen | Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------------|---|---|----------|-------------------|-------------------------|-----|----------------------|-------------------------|------|------------------|-------------------------|------|-----------|-----------------------|-----|----------------------|-------------------------|------|-----------------|--|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|---|---|---|---|---|--|
| 4. |  <p>Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: Personnel: 43 - Teacher New User</p> <p>Pick Cancel Pick Filter Columns Sort 1 / 931</p> <table border="1"> <thead> <tr> <th>Site</th> <th>Class ID</th> <th>Class Description</th> </tr> </thead> <tbody> <tr> <td>01 - RHAS: North Campus</td> <td>1</td> <td>Low Intermediate ABE</td> </tr> <tr> <td>01 - RHAS: North Campus</td> <td>1001</td> <td>ABE Intermediate</td> </tr> <tr> <td>01 - RHAS: North Campus</td> <td>1002</td> <td>ABE - CEC</td> </tr> <tr> <td>11 - RHAS: North City</td> <td>110</td> <td>Low Intermediate ESL</td> </tr> <tr> <td>01 - RHAS: North Campus</td> <td>1106</td> <td>ESL - Beginning</td> </tr> </tbody> </table> | Site | Class ID | Class Description | 01 - RHAS: North Campus | 1 | Low Intermediate ABE | 01 - RHAS: North Campus | 1001 | ABE Intermediate | 01 - RHAS: North Campus | 1002 | ABE - CEC | 11 - RHAS: North City | 110 | Low Intermediate ESL | 01 - RHAS: North Campus | 1106 | ESL - Beginning | <ul style="list-style-type: none"> Since the Personnel record is at the agency level, or in the parent container, we have access to select any Class from any Site or Sub-Site. You may Sort or Filter for a Class, and then – <ul style="list-style-type: none"> Click to highlight the Class, and then Click Pick at top of the list. RHAS Training: Select a Class at random. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Site | Class ID | Class Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01 - RHAS: North Campus | 1 | Low Intermediate ABE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01 - RHAS: North Campus | 1001 | ABE Intermediate | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01 - RHAS: North Campus | 1002 | ABE - CEC | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 - RHAS: North City | 110 | Low Intermediate ESL | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 01 - RHAS: North Campus | 1106 | ESL - Beginning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5. |  <p>Functional Role Information Container: 4908 - Rolling Hills Adult School (RHAS) Class Description: 1 - Low Intermediate ABE Personnel: 43 - Teacher New User</p> <p>Select Personnel Container: 4908 - Rolling Hills Adult School (RHAS) Personnel: 43 - Teacher New User</p> <p>Select container/associations for role Container: 4908 - Rolling Hills Adult School (RHAS) Class Definition: 1 - Low Intermediate ABE Special Program: No selection</p> | <ul style="list-style-type: none"> The Class Definition field populates with the Class selected for the Functional Role. If the Personnel member is <i>not</i> a teacher, leave “No selection” in the Class Definition field. Special Program will auto-populate if defined for the class selected. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6. |  <p>Role Identification</p> <p>Functional Role:</p> <p><input type="radio"/> Administrator <input type="radio"/> Scorer <input checked="" type="radio"/> Teacher</p> | <ul style="list-style-type: none"> Role Identification is the last section to add for Functional Role Information. Select Administrator, Scorer, or Teacher. <p>RHAS Training: Select Teacher.</p> <p><i>Note!</i> Scorer is used with the Workforce Skills Certification System, which requires additional training to implement.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7. |  <p>Role Identification</p> <p>Functional Role:</p> <p><input type="radio"/> Administrator <input type="radio"/> Scorer <input checked="" type="radio"/> Teacher</p> <p>Start Date: 7/1/2017</p> <p>End Date: July 2017</p> <p>Role is Related to Instructional Program</p> <table border="1"> <thead> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> </tr> <tr> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> <tr> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> </tr> <tr> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> </tr> <tr> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> </tr> <tr> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> </tbody> </table> | Sun | Mon | Tue | Wed | Thu | Fri | Sat | 25 | 26 | 27 | 28 | 29 | 30 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 3 | 4 | 5 | <ul style="list-style-type: none"> Click the Calendar drop-down arrow. <ul style="list-style-type: none"> Select the Start Date when the Functional Role begins within the current PY, and then repeat to Select the End Date when the Functional Role ends within the current PY. For Teachers, Start and End dates generally correspond to Start and End dates when Classes are scheduled. |
| Sun | Mon | Tue | Wed | Thu | Fri | Sat | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 25 | 26 | 27 | 28 | 29 | 30 | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |


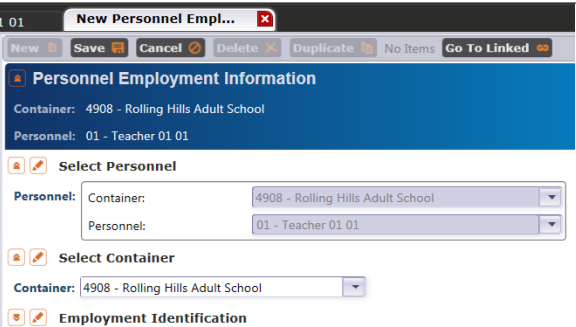
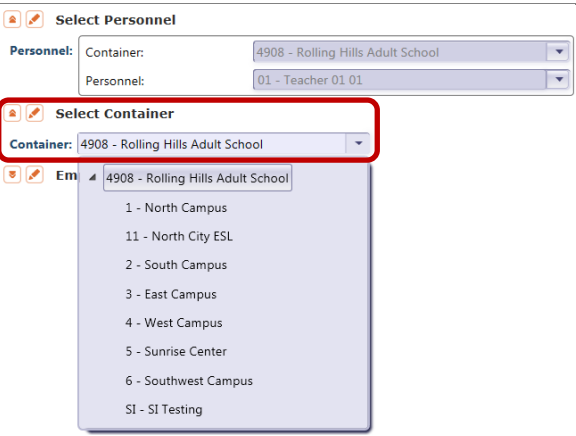
| Step | Screen | Description |
|------|---|--|
| 8. | <input checked="" type="radio"/> N/A <input type="radio"/> HSE <input type="radio"/> Basic Skills (ABE) <input type="radio"/> Career and Technical Education (CTE) <input type="radio"/> ESL/ELL <input type="radio"/> Workforce Readiness <input type="radio"/> Citizenship <input type="radio"/> Adults w/Disabilities <input type="radio"/> High School Diploma <input type="radio"/> Pre-Apprenticeship | <ul style="list-style-type: none"> • Role is Related to Instructional Program information is non-selectable. |
| 9. | | <ul style="list-style-type: none"> • After entering Functional Role Information, <ul style="list-style-type: none"> ◦ From the Toolbar at top of the record, <ul style="list-style-type: none"> ▪ Click Save. • To close the New Functional Role tab, <ul style="list-style-type: none"> ◦ Click the Red X Box and return to the Personnel record. |
| 10. | | <ul style="list-style-type: none"> • The new Functional Role record now displays at right for the Personnel Information record. • Personnel members may have more than one Functional Role within the agency. |

The screenshot shows the 'Personnel Information' record for '43 - Teacher New User'. The 'Functional Roles' section is expanded, displaying a table with the following data:

| Container | Personnel ID | Name | Class ID | Class Description | Start Date | End Date | Functional Role |
|--|--------------|------------------|----------|----------------------|------------|----------|-----------------|
| 4908 - Rolling Hills Adult School (RHAS) | 43 | Teacher New User | 1 | Low Intermediate ABE | 7/1/2017 | | Teacher |

Employment Records


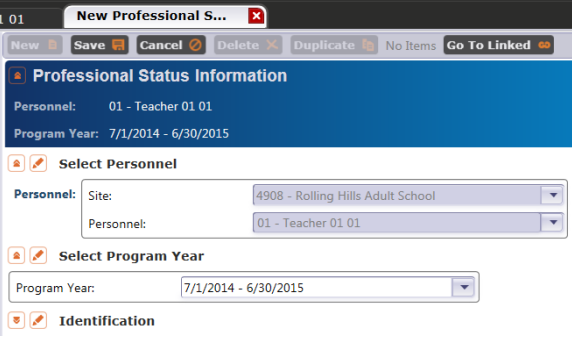
- The next record to add for the new **Personnel** member is information about **Employment**.
- **Employment Types** consist of
 - **State and Local Services**, and
 - **Teachers, counselors, and paraprofessionals**, working
 - **Full-time, part-time, or as unpaid volunteers**.
- **Personnel** may have more than one **Employment Type** within the agency.

| Step | Screen | Description |
|------|---|---|
| 1. |  <p><i>*Note!</i> Using the Navigator when adding “child” records that are related to the “parent” record is the recommended approach to ensure data entry accuracy and avoid errors.</p> | <ul style="list-style-type: none"> • From the Personnel Information record Navigator at left, <ul style="list-style-type: none"> ○ Click Personnel Employment. • To add Employment Information for the Personnel member <ul style="list-style-type: none"> ○ Click New at right. |
| 2. |  | <ul style="list-style-type: none"> • A new tab opens to input Personnel Employment Information in three distinct sections. <ol style="list-style-type: none"> 1. Personnel information, 2. The Container to associate employment, and 3. Employment Identification. • Notice that Personnel and Container fields auto-populate when adding an Employment record from the Navigator.* |
| 3. |  | <ul style="list-style-type: none"> • Employment may be at the agency level or at a site level. • To identify the Container to associate Employment, <ul style="list-style-type: none"> • Click the Container field down arrow and – <ul style="list-style-type: none"> ▪ Select a Site level, or child container to associate Employment, or ▪ Keep at the Agency level. |

| Step | Screen | Description |
|------|--------|---|
| 4. | | <ul style="list-style-type: none"> For Employment Identification, <ul style="list-style-type: none"> Click the drop-down calendar, and <ul style="list-style-type: none"> Select the Date, or enter manually, when employment began within the current program year. |
| 5. | | <ul style="list-style-type: none"> Select Employment Type, and Select Job Type to match the Employment Type at the Container selected. Personnel may have more than one Employment Type and Job Type within the agency. <ul style="list-style-type: none"> Add separate records per type. After entering Personnel Employment Information, from the Toolbar at top of the record, <ul style="list-style-type: none"> Click Save. |
| 6. | | <ul style="list-style-type: none"> To close the New Personnel Employment tab, <ul style="list-style-type: none"> Click the Red X Box and return to the Personnel record. |
| 7. | | <ul style="list-style-type: none"> The new Personnel Employment record now displays at right in the Personnel Information record. Personnel may have more than one Employment record within the agency. |

Professional Status

- The last record to add for the new **Personnel** member is information about **Professional Status**.
- A **Professional Status** record identifies –
 - **Years of experience in adult education**, and
 - **Teacher certificates**.
- This record applies to –
 - **Administrators**,
 - **Scorers**, and
 - **Teachers**.
- This record is reportable in **Federal Table 7**.

| Step | Screen | Description |
|-----------|---|---|
| <p>1.</p> |  <p><i>*Note!</i> Using the Navigator when adding “child” records that are related to the “parent” record is the recommended approach to ensure data entry accuracy and avoid errors.</p> | <ul style="list-style-type: none"> • From the Personnel Information record Navigator at left, <ul style="list-style-type: none"> ○ Click Professional Status. • To add Professional Status Information for the personnel member <ul style="list-style-type: none"> ○ Click New at right. |
| <p>2.</p> |  | <ul style="list-style-type: none"> • A new tab opens to input Professional Status Information in three distinct sections. <ol style="list-style-type: none"> 1. Personnel information, 2. Program Year, and 3. Identification. • Notice that Personnel and Program Year fields auto-populate when adding a Professional Status record from the Navigator.* |

| Step | Screen | Description |
|------|--------|---|
| 3. | | <ul style="list-style-type: none"> Enter Years of Experience in Adult Education, and Check all Teacher Certificates that apply. After entering Professional Status Information, from the Toolbar at top of the record, <ul style="list-style-type: none"> Click Save. |
| 4. | | <ul style="list-style-type: none"> To close the New Professional Status tab, <ul style="list-style-type: none"> Click the Red X Box and return to the Personnel record. |
| 5. | | <ul style="list-style-type: none"> The new Professional Status record now displays at right in the Personnel Information record. Personnel may have more than one Professional Status record within the agency as new credentials are earned per PY. |

Import Personnel and User Data

| Step | Screen | Description |
|------|--------|--|
| 1. | | <ul style="list-style-type: none"> See Exchanging Data with 3rd Party Systems v.1.1 for more information about importing Personnel and User Data <ul style="list-style-type: none"> ➤ IMPORT: PERS – Personnel and User Data A folder of TE WIOA Import Templates is available from the CASAS website to help you populate your online account without manual data-entry or 3rd Party Import. <ul style="list-style-type: none"> Go to: Home > Product Overviews > Software > TOPSpro Enterprise > TOPSpro Enterprise Help > Data Exchange > TE WIOA Import Templates |

Steps to Add and Manage Access Groups


A *User* may belong to one TE and one ET Access Group. The evaluation of **Access Rights** enabled at the individual **User Account** is dependent on the **Container** where rights are checked, and only membership in **Access Groups** defined at that **Container** level or above is taken into account.

- **Access Rights** from an **Access Group** defined at the evaluated **Container** will take precedence over rights defined at **Containers** above the evaluated container.
- **User** access to various data may differ if the **Access Groups** in which the **User** is a member have different rights set or are defined at different containers.

Access Group Information

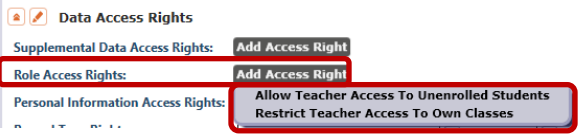

-   **Select Container**
-   **Access Group Identification**
-   **Menu Access Rights**
-   **Container Access Rights**
-   **Data Access Rights**

Menu and Data Access Rights Defined

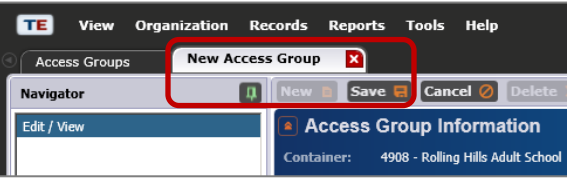
| Menu Access Rights | | Data Access Rights |
|--|---|---|
| <p>Shaded Box:</p> <ul style="list-style-type: none"> • By default, shaded boxes indicate that no specific access rights to menus are set for the User, which means all rights are granted. • If the User is a member of an Access Group, shaded boxes indicate that access rights to menus are inherited from the associated group. |  | <p>Shaded Box:</p> <ul style="list-style-type: none"> • By default, shaded boxes indicate that no access rights to data are set for the User, which means all rights are denied. • If the User is a member of an Access Group, shaded boxes indicate that access rights to individual record types are inherited from the associated group. |
| <p>Checked Box:</p> <ul style="list-style-type: none"> • A checked box indicates that access to a specific menu is granted for the User where otherwise is denied by an associated Access Group. | | <p>Checked Box:</p> <ul style="list-style-type: none"> • A checked box indicates that access to a specific menu is granted for the User where otherwise is denied by an associated Access Group. |
| <p>Empty Box:</p> <ul style="list-style-type: none"> • An empty box indicates that access to a specific menu is denied for the User where otherwise is granted by an associated Access Group. | | <p>Empty Box:</p> <ul style="list-style-type: none"> • An empty box indicates that access to a specific menu is denied for the User where otherwise is granted by an associated Access Group. |

Defining Group Access Rights

| Step | Screen | Description |
|------|--------|---|
| 1. | | <ul style="list-style-type: none"> For ease with managing Users through Access Group, establish and maintain groups at the agency level, or parent container. <ul style="list-style-type: none"> Check Usable in Child Containers to add Users from any level – agency or site. Give the Access Group a Title that best defines User access to data in TE. |
| 2. | | <ul style="list-style-type: none"> By default, <u>all</u> Menu Access Rights are enabled for Access Groups. <ul style="list-style-type: none"> Uncheck appropriate box(es) to deny access to specified Menus. If Users belonging to the group have <i>no</i> Menu Access Rights defined at the User Account, <ul style="list-style-type: none"> they will inherit the rights set for this group. If Users belonging to this group have Menu Access Rights defined at the User Account, <ul style="list-style-type: none"> those rights will take precedence. Specify Menu Access Rights for an Access Group <i>only</i> to restrict or open access where otherwise the User Account denies. |
| 3. | | <ul style="list-style-type: none"> Select Container Access Rights (if applicable) for the group. Depending on selected access right, Users belonging to the Access Group are allowed to see records from containers other than the default one where the Access Group is created. |

| Step | Screen | Description |
|------|---|--|
| 4. | <ul style="list-style-type: none"> • Container-Level Logic <ul style="list-style-type: none"> ○ If “View Records From Base Container” is selected, Users belonging to the Access Group are allowed to view data registered at base-level container. ○ If “View Records From Parent Container” is selected, Users belonging to the Access Group are allowed to view data registered in the parent container of the current container and in entire container tree below the parent container. ○ If “View Records from Sibling Container” is selected, Users belonging to the Access Group are allowed to view data registered in any container having the same parent as the current container. | |
| 5. | <p>Notes!</p> <ul style="list-style-type: none"> – Base Container for any Site or Sub-Site defined Access Group is the Agency-Level Container. – Base Container for an agency-defined Access Group is the State-Level Container. – Base Container for a state-defined Access Group is the System-Level Container. – Parent Container is one level above the Container where the Access Group is defined. – Sibling Container is any Container having the same parent container with the container where the Access Group is defined. | |
| 6. |  <p>Note! Teachers must have a Personnel Record with Functional Role for these settings to take effect.</p> | <ul style="list-style-type: none"> • For a Teacher Access Group, you have the option to – <ul style="list-style-type: none"> ○ Allow Teacher Access to Unenrolled Students so that teachers may enroll students in classes. ○ Restrict Teacher Access To Own Classes to prohibit teachers from viewing information about other classes. |
| 7. |  | <ul style="list-style-type: none"> • Enabling Record Type Rights requires strict adherence to the Family Educational Rights and Privacy Act (FERPA). • This setting is most appropriate for administrators and data managers. |
| 8. | <ul style="list-style-type: none"> • To enable Record Type Rights for access to data contained in the Menu(s) selected for the Access Group, click corresponding box(es). • By default, unchecked boxes indicate that access rights to individual record types are denied for Users belonging to the Access Group. <ul style="list-style-type: none"> ○ List Records –provides access to list records only. ○ View Record – provides access to view details of listed/selected/filtered records. ○ Create/Update/Delete Record – provides access to add, edit, and delete records. | |

| Lister / Record Type | <input type="checkbox"/> List Records | <input type="checkbox"/> View Record | <input type="checkbox"/> Create Record | <input type="checkbox"/> Update Record | <input type="checkbox"/> Delete Record | <input type="checkbox"/> Check All |
|----------------------------------|---------------------------------------|--------------------------------------|--|--|--|-------------------------------------|
| Agencies | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Program Years | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Sites | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Class Definitions | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Class Instances | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Testing Stations | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Testing Session Templates | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Testing Sessions | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Tests in Progress | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Test Administrations | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| WSCS Administrations | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AEBG Consortia | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Core Performance Measures | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Core Performance Surveys | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Deleted Objects | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Personnel | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Personnel Employment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Functional Roles | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professional Status | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Scoring Project Personnel | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Scoring Personnel Unavailability | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Assignments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Demographics | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| In Program Years | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Tests | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Student Records | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Class Enrollments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Class Records | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Program Enrollments | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Program Records | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Demographic History | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Employment History | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Certificates | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| LRI Results | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Access Groups | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Users | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Special Programs | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Assessment Forms | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Field Tests | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Form Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Form Items | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Additional Assessments | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Places of Employment | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Scoring Project Settings | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Reports Manager | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3rd Party Vendors | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3rd Party Import Log | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| Step | Screen | Description |
|------|--|---|
| 9. |  | <ul style="list-style-type: none"> • After creating or editing Access Group Information, from the Toolbar at top of the record, <ul style="list-style-type: none"> ○ Click Save. • To close the New Access Group tab, <ul style="list-style-type: none"> ○ Click the Red X Box and return to the Access Groups list of records. |
| 10. | <p><i>Ask CASAS!</i> To apply pre-configured Access Groups to your online account that you can further customize to meet your user group needs.</p> | |

CASAS Contact Information

| | |
|--|--|
| Mail: | CASAS 5151 Murphy Canyon Rd., Suite 220 San Diego, CA 92123-4339 |
| Website: | www.casas.org |
| Telephone: | (858) 292-2900 or toll free (800) 255-1036 |
| Fax: | (858) 292-2910 |
| E-mail: | |
| General questions: | casas@casas.org |
| Training questions: | training@casas.org |
| Ordering questions: | orders@casas.org |
| California Accountability: | capm@casas.org |
| California AEBG - Adult Ed Block Grant: | aebg@casas.org |
| CASAS Technology Support Team: | techsupport@casas.org |

Training Support

Help documentation is available at: [CASAS Home](#) > [Training and Support](#) >

- [eTests Online Help](#)
- [TOPSpro Enterprise Help](#).

Enroll in a complimentary workshop at: [CASAS Training Registration](#).

Technical Support

The **CASAS Technology Support Team** is available at techsupport@casas.org to provide technical assistance for successful online implementation and uninterrupted test delivery. Team members are available 6:00 am – 5:00 pm (Pacific), M – F, at 1-800-255-1036, option 2.

If you have any questions or if there is anything that we may help you with, please let us know.

CASAS Technology Support Team

techsupport@casas.org | 1-800-255-1036, option 2



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