ACTIVITY PACKET

TOPSpro Enterprise Basics
Quick Start!

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Session Description

Welcome to TOPSpro Enterprise (TE) Online! This session jump-starts your familiarity and use of this nationally recognized learner management and accountability system. It is important that you gain a fundamental understanding of the theoretical basis for TE Online before examining specific applications of the software. You will learn how this powerful database system works by experiencing first-hand how the features operate. This session will teach you the essentials of the application in this hands-on lab setting. System fundamentals include:

- Navigation
- Finding & Editing Data
- Add New Records Manually
- User Access

This session is appropriate for those who have little or no experience using TE Online.
Navigating TE

To use the many features of TOPSpro Enterprise (TE), you will need to know how to find them by navigating through the menus. TE uses the same type of menu system that you see in most Windows-based applications.

Install and Open TE Online

To access TOPSpro Enterprise Online (TE) for the first time, launch the web browser and enter the URL for the CASAS Online System your program uses.*

<table>
<thead>
<tr>
<th>Server</th>
<th>Use any modern web browser</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Global</td>
<td><a href="https://etestsonline.org/html5/#/">https://etestsonline.org/html5/#/</a></td>
</tr>
<tr>
<td>*California</td>
<td><a href="https://ca.etestsonline.org/html5/#/">https://ca.etestsonline.org/html5/#/</a></td>
</tr>
<tr>
<td>*LARAEC</td>
<td><a href="https://laraec.etestsonline.org/html5/#/">https://laraec.etestsonline.org/html5/#/</a></td>
</tr>
<tr>
<td>*Miami Dade</td>
<td><a href="https://etestsonline.org/MiamiDade/html5/#/">https://etestsonline.org/MiamiDade/html5/#/</a></td>
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</tbody>
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For Training, go to Rolling Hills Simulation – https://etestsonline.org/rollinghills/html5#/ |

<table>
<thead>
<tr>
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</table>
| 1.   | ![Screen 1](https://etestsonline.org/RollingHills/html5/#/) | - Access TE in one of three ways, from the –
  - **1. Web browser**
    - Click **Install TE Client** if first access on local machine.
  - **2. Taskbar** icon
  - **3. Desktop** icon |
| 2.   | ![Screen 2](https://etestsonline.org/) | - Click the **Server** field down-arrow and from the drop-down menu,
  - Select the **Server** for your online account.*
  - Enter your **Agency ID**.
  - Enter your **User** name.
  - Enter your **Password**.
  - Click **Connect**. |
Explore Menus and Submenus

TE opens with an empty screen and a menu bar along the top. Not all agencies using the CASAS Online System have access to all menus and data functions, and not all users have access to data or rights to edit records.

Visit the CASAS website for more information about Assessment and Database Management Features to understand ‘basic’ vs. ‘enhanced’ access to the CASAS Online System.

Take a Highlights Tour to look at some menu features and to see how TE organizes menus.

<table>
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<tbody>
<tr>
<td>1.</td>
<td><img src="1" alt="Screen" /></td>
<td>• All data and reports display on the screen from accessing the Menu bar along top left.</td>
</tr>
</tbody>
</table>
| 2.   | ![Screen](2) | • Top right displays,  
  o Logged-on User.  
  o Application Version.  
  o General screen Controls.  
  o Pages tab to clear your screen(s). |
| 3.   | ![Screen](3) | • Click the TE Icon at top left of your screen.  
  • Before exiting TE, it’s best to –  
    o Disconnect your TE Client to close connection with the server on your local machine.  
  • Click Options… |
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 4.   | ![Screen](general.png) | - Look at the **General** tab.  
  - **Interactive Timeout Interval**  
    - Adjust # of minutes before the TE Client suspends activity.  
    - Applies to TE Client on the local machine only. |
| 5.   | ![Screen](on_start.png) | - Click the **On Start** tab.  
  - **Remaining WTUs**  
    - Set a TE Client reminder when # of **WTUs** reaches a minimum set by users.  
    - Applies to TE Client on local machine only. |
| 6.   | ![Screen](edit_view.png) | - Click the **Edit / View** tab.  
  - **Name Options**  
    - Set option for entering names.  
    - Apply option to correct names.  
    - Applies to TE Client on local machine only.  
  - To close the **Options** window,  
    - Click the **Red X Box** at top right. |
| 7.   | ![Screen](view.png) | - Click the View menu.  
  - **Screen Display**  
    - Normal is the default.  
    - Adjust for viewing on local TE Client. |
### Navigation

<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td><strong>8.</strong></td>
<td><img src="image" alt="Organization" /></td>
</tr>
<tr>
<td><strong>9.</strong></td>
<td><img src="image" alt="Reports" /></td>
</tr>
<tr>
<td><strong>10.</strong></td>
<td><img src="image" alt="Tools" /></td>
</tr>
</tbody>
</table>

#### Description

- **Highlight or click the Organization menu.**
  - **Sub-menus** contain detailed information about the organizational setup of an online account.
- **Click the Records menu.**
  - **Menu Categories** identify groups of lists with records for tracking program and student activity.
  - **Sub-menus** identify the type of records.
- **Highlight or click the Reports menu.**
  - **Menu Categories** identify groups of reports that help programs meet a wide variety of reporting needs.
  - **Sub-menus** identify the type of report.
- **Highlight or click the Tools menu.**
  - **Sub-menus** list operations for managing data.
- **Highlight or click the Help menu.**
  - **Release Notes** are included with each update to the Online System.
  - Review **Notes** for important new features and enhancements as well as any necessary fixes.
Finding Information

The online system functions like a web browser to fetch information and display on the screen in tabbed pages. Using tabs as a navigational tool is a feature that allows you to switch between multiple pages of information.

Understanding the Relationship of Records in TE

TOPSpro Enterprise is a relational database that contains a collection of interrelated records, which stores information and relates records by a common element. In TE, that element is the identification field. For a student, that field contains the identification code unique to the learner that links all records related to the learner. The graphic below presents this concept.

The Student Identification (ID) code provides the minimum information for TE to add a student record. The student Demographics record is the "parent" record for all other learner-related records. Every time you add another record, TE links the ID to the corresponding student, and creates a new record. These other records contribute additional information to the student and are the “child” records in the database. TE connects the parent and child records by ensuring that they all include one common variable – the Student Identification (ID) code.

Customizing Lists of Records

TE uses Listers to display lists of records. Each lister name indicates the information that it contains. Listers are like spreadsheets but in electronic form. You may sort, filter, add, hide, and organize columns, set advanced filtering options, print, and export the information displayed.
Using the student as an example, let’s customize the Demographics lister.

<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
</table>
| 1.   | ![Menu bar and Click Records](Image) | - From the **Menu bar** at top,  
- Click **Records**.  
  - Select **Students**.  
  - Click **Demographics**. |
| 2.   | ![Tabbed page](Image) | - A tabbed page opens to the list of **Demographics** records with a **Toolbar** along the top.  
  - Records display for students having activity in the **Current Program Year** (July 1 – June 30).  
  - Sorts on **Student ID**.  
  - **Most Column Headers** have **Up/Down arrows** and **Filter icons**. |
| 3.   | ![Sorting by Name](Image) | - To sort by **Name**,  
  - Click the **Name column UP arrow**.  
  - By default, the **Name column** sorts by **First name**. |
| 4.   | ![Splitting Name column](Image) | - Each list of records has its own default **Schema**, or **Column Configuration**.  
  - You may change the configuration of columns and save the **Schema** on your **TE Client**.  
  - To split the **Name** column into **First**, **Middle**, and **Last** name columns,  
    - Point your mouse in the **Name column** header.  
    - Right mouse-click.  
  - From the drop-down menu listing all columns available in the **Demographics** lister,  
    - Click **Show First Name**. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 5.   | ![Screen](image1.png) | • Now you will see the **First** name has its own column.  
      • Repeat these steps to add a **Middle** name and **Last** name column. |
| 6.   | ![Screen](image2.png) | • Now that the **Name** column is split into three columns for **First**, **Middle**, and **Last** name, you no longer need the column.  
      • Right mouse-click in the **Name** column header.  
        o Select **Hide Full Name**. |
| 7.   | ![Screen](image3.png) | • The **Name** column is now hidden from the list.  
      • You may unhide any column to display again in the list of records.  
      • Lister may be **Reset to Defaults** at any time. |
| 8.   | ![Screen](image4.png) | • Reordering columns will further customize the list of **Demographics** records for your TE Client.  
        o Left click-and-hold your mouse in the **Last Name** column header.  
        o While holding, drag the **Last Name** column left of the **First Name**, and then release your mouse. |
<p>| 9.   | <img src="image5.png" alt="Screen" /> | • The <strong>Demographics</strong> lister now displays names in a <strong>Last</strong>, <strong>First</strong>, and <strong>Middle</strong> name column configuration. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen Description</th>
<th>Description</th>
</tr>
</thead>
</table>
| 10.  | ![Last Name Column](image1) | - In the **Last Name** column header  
  - Click the **UP** arrow to sort alphabetically. |
| 11.  | ![Sort Columns](image2) | - Suggestion: Configure and presort columns:  
  1. Click the **UP** arrow in the **Last Name** column header.  
  2. Click and hold the **Shift** key on your keyboard, and then click the **UP** arrow in the **First Name** column header.  
  3. Click and hold the **Shift** key again, and click the **UP** arrow in the **Middle Name** column header.  
  - Release the **Shift** key. |
|      | ![Gender and DOB](image3) | - Note! Adding **Gender** and **DOB** columns helps with identifying any duplicate records of the same student. |
| 12.  | ![Edit Schema](image4) | - To save the configuration of your columns,  
  - Click the **More** button from the **Toolbar** at top right for ‘more’ buttons.  
  - Click **Edit Schema**.  
  - Click **Save**.  
  **Remember!** You can always reset listers to their default column configuration. |
| 13.  | ![Demographics Tab](image5) | - Check to confirm that your TE Client will display the Demographics lister in ‘your’ default Schema next time you open it.  
  - To close the **Demographics** lister,  
  - Click the **Red X Box** on the **Demographics** tab. |
### Step 14

**Screen**

- You can also close several pages at the same time by clicking **Pages** at top right.
- From the drop-down menu,
  - Click **Close All Pages**.
  - Or click individual **Pages** listed at bottom of the menu.

### Step 15

- To reopen the **Demographics** lister, go to
  - **Records > Students > Demographics**
- The list of **Demographics** records should display as the saved default **Schema** on your TE Client.

### Step 16

**Note!**

- You may also name different **Schemas** and access them from the **Toolbar** at top of the list
  - Click the **(Default)** window down arrow and select a saved **Schema**.
Using the Navigator

Let the TE Navigator be your guide! In listers, the Navigator links all ‘child’ records related to the ‘parent’ record and displays them in a list to navigate easily between them. The report setup Navigator gives quick access to listers to refine information to include in the report.

The Navigator will also guide you to adding ‘child’ records to ‘parent’ records by prepopulating key fields from the ‘parent’ record. When entering data manually, it is recommended to use the Navigator for data-entry accuracy.

Using the student as an example, let’s explore ‘child’ records and see how many are linked to the student’s ‘parent’ Demographic record through the Navigator.

### Step 1

**Screen**

A filter for a Student with your First or Last Name.

- Click the First or Last Name column Filter icon.
- Enter your First Name.
- Click OK.

### Step 2

**Screen**

The Demographics lister may or may not display a record of a student having your First or Last Name. That’s Ok!

- Filter for a friend or any other name instead.
- Double click to open the Highlighted record.

### Step 3

A new tabbed page opens to a split screen with the –

- Record Navigator at left.
- Student Information at right.
- Edit/View contains the ‘parent record’ data for the student.
- Remaining selections on the Navigator represent ‘child records.’
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td><img src="image1" alt="Navigator Screen" /></td>
<td>• Clicking the different options from the <strong>Navigator</strong> provides views of a variety of information about that student.</td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Navigator Screen" /></td>
<td><strong>Remember!</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The student’s unique <strong>Identification (ID)</strong> code is what links all of the records assigned to the student, and supplies the minimum information TE needs to create a student Demographic record.</td>
</tr>
<tr>
<td>5.</td>
<td><img src="image3" alt="Navigator Screen" /></td>
<td>• From the <strong>Navigator</strong> at left,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Click <strong>In Program Years</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• At right lists records for each program year in which the student has dated activity.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A <strong>Program Year</strong> is defined as <strong>July 1 through June 30</strong>.</td>
</tr>
<tr>
<td>6.</td>
<td><img src="image4" alt="Navigator Screen" /></td>
<td>• From the <strong>Navigator</strong> at left,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Click <strong>Student Records</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The records listed at right are of all dated activity that occurred for the student during the program year.</td>
</tr>
<tr>
<td>7.</td>
<td><img src="image5" alt="Navigator Screen" /></td>
<td>• From the <strong>Navigator</strong> at left,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Click <strong>Class Enrollments</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• This list will only include one record for each class in which the student is enrolled.</td>
</tr>
</tbody>
</table>
### Training and Support

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<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 8.   | ![Class Records Screen](image1.png) | • From the *Navigator* at left,  
  ○ Click *Class Records*.  
  • This section includes separate records of all class related activity for the student. |
| 9.   | ![Program Enrollments Screen](image2.png) | • From the *Navigator* at left,  
  ○ Click *Program Enrollments*.  
  • This section will only include one listing for each program in which the student is enrolled. |
| 10.  | ![Program Records Screen](image3.png) | • From the *Navigator* at left,  
  ○ Click *Program Records*.  
  • This list includes separate records of all program related activity for the student. |
| 11.  | ![Tests Screen](image4.png) | • From the *Navigator* at left,  
  ○ Click *Tests*.  
  • This is a list of tests taken by the student. |
| 12.  | ![Edit/View Screen](image5.png) | • Return to *Edit/View* to edit Student Information. |
Editing Student Information

<table>
<thead>
<tr>
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</table>
| 13.  | ![Identification Screen](image1) | - By default, the Edit/View page opens in View mode.  
- To edit a student ID,  
  - Click the Pencil icon in the Identification section and Change to Edit Mode. |
| 14.  | ![Student ID Screen](image2) | - Type in the Student ID field and change the ID.  
- From the Toolbar at top.  
  - Click Save.  

  **Note!** A change to the Student ID will simultaneously edit all ‘child’ records linked to the student. |
| 15.  | ![Tests Screen](image3) | - To see how that works,  
  - Click Tests from the Navigator.  

  - You may notice that the ID does not appear to have changed.  
  - Continue on to solve the mystery!... |
16. • At top right of the student’s Tests lister,  
  ○ Click Refresh.
• This will ‘refresh’ the page on your TE Client.

17. • Voila!  
  ○ Now you see that the ID on all Tests linked to the student are changed.

18. • To clear your screen,  
  ○ Click Pages at top right.  
    ▪ Select Close all Pages.
Adding Records Manually

The CASAS Online System offers four methods for adding records to your online account through both applications – eTests Online together with TE Online.

- **eTests Online**
  1. **Sessions** – for testing and collecting demographic information

- **TE Online**
  2. **Manual data entry** – using the keyboard and mouse
  3. **Scanning** – using an optical mark scanner
  4. **Importing** – from a 3rd Party System or fillable Import Template

Steps to Add Sites

Sites are part of the organizational structure of an online account and represent physical locations where instruction and training take place. Sites may serve learners in multiple instructional programs. Agencies may add Sites to their online account at any time.

*eTests Site*

Any Site using eTests Online must comply with all testing requirements in each lab within a Site as outlined in the Online Implementation Agreement training.

- Web-test units (WTUs) must be available in an online account to enable an eTests Site.
- Sites must be enabled for eTests to register computers and administer tests.

### Step Screen Description

<table>
<thead>
<tr>
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</thead>
</table>
| 1.   | • From the **Menu bar** at top,  
|      |   o Click **Organization**.  
<p>|      |     ▪ Select <strong>Sites</strong>. |</p>
<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
</table>
| 2.   | ![Sites Setup Screen](image1.png) | • A new tabbed page opens listing the **Sites** setup in the online account.  
• Sites that use eTests Online are identified as an **eTests Site**.  
• To be an **eTests Site**, agencies complete a "**Going Live**" Checklist, which includes:  
  o Online Implementation Agreement  
  o Coordinator Certification  
  o Proctor Certification  
  o Order web-test units (WTUs)  
• From the **Toolbar** at top left,  
  o Click **New**. |
| 3.   | ![New Site Screen](image2.png) | • A new tabbed **Page** opens to add information about the new **Site** for your agency.  
• Sites are added to **Containers**, which ‘contain’ records of activity occurring at that site.  
  o Your **Agency** is the ‘parent’ container for your online account. |
| 4.   | ![Site Information Screen](image3.png) | • **Sites** are ‘child’ records of your **Agency**.  
• **Sites** are typically added to the ‘parent’ container but may also be a Sub-Site.  
• The determination of ‘where’ to add a new **Site** depends on How? you plan to track and record outcomes.  
• Click the **Container** field down-arrow.  
  o Select the **Container** to add the new **Site**. |
### Step 5

**Screen**

- **Site Identification**
  - **Site ID:** Enter the Site ID.
  - **Site Name:** Enter the Site Name.
  - **eTests Site:** Check if you plan to use CASAS eTests Online at the Site and WTUs are available for online test administration.

### Step 6

**Screen**

- To close the new Site record,
  - Click the Red X Box on the Site tab.

### Step 7

**Screen**

- This returns you to the Sites lister where you will see the new Site in the list of records.

### Step 8

**Screen**

- Click the Red X Box on the Sites tab and close the lister.
Steps to Add and Manage Users

Access to the CASAS Online System requires a User record with login credentials. Users are part of the organizational structure of your online account. When setting up a new account, CASAS establishes one User for the agency with rights to manage data and grant User access to TE Online and/or eTests Online for other staff as appropriate. When adding Users to your online account, CASAS recommends adding records at the agency level for ease with managing records and user access.

Access to TE Online

- May be granted to any staff as appropriate.
- eTests Online coordinator and proctor certification is not required for staff access TE Online.

Access to eTests Online

- May only be granted upon confirmation of coordinator and/or proctor certification.
- The agency must maintain copies of certificates on file.
  - Coordinator Certification – Staff responsible for online testing management.
  - Proctor Certification – Staff responsible for online test administration.

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</thead>
</table>
| 1.   | ![Organization](image1) | From the Menu bar,  
- Click **Organization**.  
  - Select **Users**. |
| 2.   | ![Users](image2) | A tabbed page opens to the list of **User** records.  
- From the **Toolbar** at top left of the list.  
  - Click **New**. |
### User Access

<table>
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</tr>
</thead>
</table>
| 3.   | ![User Information](image) | **Check Link with existing personnel** –  
  - When a **Personnel** record exists in your online account.  
  - If a record does not exist, you will have the option to link accounts when adding the **Personnel** record. |
| 4.   | ![Select Container](image) | **Click the Container field down-arrow.**  
  - Select the container to add the new **User** record.  
  **Note!** Add Users at the Agency level when linking accounts with Personnel records. |
| 5.   | ![User Identification](image) | **User Identification** will be the login credentials for the new **User**.  
  - Enter a **Work e-mail** address as the user name (recommended).  
  - Enter a temporary **Password**.  
  - Users are prompted to change their password the first time they log in. |
| 6.   | ![User Groups](image) | **Add the new **User** to an **Access Group**.**  
  - You have **three** options to do this.  
  - Click the **Group** field down-arrow,  
    1. **Type to Search** for the Group.  
    2. **Scroll to Select** the Group.  
    3. **Select [Group] from Lister.** |
| 7.   | ![User Identification](image) | **After selecting an **Access Group**,**  
  - Click **Add** at right of the selected **Group**. |
<table>
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</thead>
</table>
| 8.   | ![Screen](image1.png) | **If the new User will need access to eTests Online to:**  
  - Manage online testing (**Coordinator**).  
  - Administer online tests (**Proctor**).  
    - Add the new user to the access group that matches with their certification. |
| 9.   | ![Screen](image2.png) | **Add Contact Information** for the new User.  
  - The minimum information required for adding an account is:  
    - First Name.  
    - Last Name.  
    - Email |
| 10.  | ![Screen](image3.png) | **No other setup is needed for the new User when added to Access Groups.**  
  - Click **Save** from the **Toolbar** at top. |
| 11.  | ![Screen](image4.png) | **Click the Red X Box** on the **User** record tab and return to the lister. |
| 12.  | ![Screen](image5.png) | **Use the First/Last Name** column filter to locate the new **User** among the list of records. |
## User Access

### Defining Group Access Rights

For ease with managing Users through Access Groups, establish and maintain groups at the agency level (i.e., parent container).

<table>
<thead>
<tr>
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</thead>
</table>
| 1.   | ![Menu Bar](image1.png) | • From the **Menu bar**,  
  ▪ Click **Organization**. |
| 2.   | ![Access Groups](image2.png) | • The tabbed page opens listing **Groups** for Agencies to manage User **Access** to TE.  
  • TE Data Managers may –  
    ▪ **Edit**, **Rename**, or **Duplicate** the default set of groups added by CASAS when setting up a new online account. |
| 3.   | ![Access Group Information](image3.png) | • TE Data Managers may also –  
  ▪ **Add** new **TE Access Groups** to manage users based on their role at the Agency, such as a School Counselor or the Registrar. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 4.   | ![Access Group Information Screen](image) | • Groups have access to TE according to the rights enabled in **three** areas:  
1. **Menu** Access Rights  
   - Defines access to menus and submenus.  
2. **Container** Access Rights  
   - Defines access to sites and sub-sites.  
3. **Data** Access Rights  
   - Defines read-only access, or rights to create, update, and/or delete data. |
| 5.   | ![Data Access Rights Screen](image) | • Granting **Teachers** access to TE requires having a **User** record linked with a **Personnel** record to identify their **Functional Role** as the teacher for their classes.  
• Teachers may,  
  - Generate **Reports** for their own classes.  
  - Manage their **Class Enrollment**.  
  - Record **Attendance**.  
  - View **Test** results taken by students enrolled in their class. |

*Ask CASAS! To apply the default set of Access Groups to your online account*

For more information about **Access Groups** is available from the training materials library on the CASAS website at [Home > Training and Support](http://www.casas.org/training-support).
### Steps to Add and Link Personnel Records

Personnel records are part of the organizational structure of an online account and include Registration, Functional Role, Employment Record, and Professional Status information.

#### Personnel Registration

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | ![Menu bar and Personnel selection](image1.png) | - From the Menu bar.  
  - Select Personnel.  
  - Click Registration. |
| 2.   | ![Organization and Personnel selection](image2.png) | - To add a new Personnel record,  
  - Click Registration. |
| 3.   | ![Toolbar and New selection](image3.png) | - A tabbed page opens to the list of Personnel records in your online account.  
- From the Toolbar at top left of the list,  
  - Click New. |
### Personnel Information

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 4.   | ![Personnel Information](image1) | - When a User record exists in your online account,  
  - Check **Link with existing user.** |
| 5.   | ![Personnel Information](image2) | - Click the **Container** field down-arrow.  
  - Select the **Agency** level (recommended)  
  - Or **Site** level. |
| 6.   | ![Personnel Information](image3) | - You have **three** options to select an existing **User**.  
  - Click the **User** field down-arrow,  
    1. **Type to Search** for the User.  
    2. **Scroll to Select** the User.  
    3. **Select [User] from Lister.** |
| 7.   | ![Personnel Information](image4) | - When the **User** is located,  
  - Click on the **User** to select. |
### Personnel

**Step** | **Screen** | **Description**
--- | --- | ---
8. | ![Personnel Information fields auto-populate after selecting and linking the User.](image) | - **Personnel Information** fields auto-populate after selecting and linking the User.  
  - Enter an Agency **Personnel ID**.
9. | ![From the Toolbar at top,](image) | - From the **Toolbar** at top,  
  - Click **Save**.
10. | ![The new Personnel record page splits automatically with](image) | - The new **Personnel** record page splits automatically with  
  - **Personnel Information** at right  
  - **Navigator** at left to add and access Personnel records.  
  - Click the **Red X Box** on the **Registration** tab and return to the Personnel record.

### Functional Roles

Functional Roles identify personnel involved in the administration and teaching of adult learners. Personnel may have more than one Functional Role within the agency. Adding Functional Roles for teachers gives them access to their classes at any time from any location with Internet connection.

**Step** | **Screen** | **Description**
--- | --- | ---
1. | ![From Navigator at left of the Personnel Information record,](image) | - From **Navigator** at left of the **Personnel Information** record,  
  - Click **Functional Roles**.  
  - To add a **Functional Role** for the Personnel member,  
  - Click **New** at right.
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 2.   |        | • A new tab opens to input **Functional Role Information** in three sections.  
       |        |  1. Personnel information,  
       |        |  2. Container to associate the role.  
       |        |  3. Role Identification.  
       |        | • Personnel and Container fields auto-populate when using the Navigator to add records.  
| 3.   |        | • To link the Personnel member with a Class,  
       |        |   o Click the Class Definition field down-arrow and  
       |        |     ▪ Type to search.  
       |        |     ▪ Scroll to select.  
       |        |     ▪ Select from Lister  
       |        |   o Select the Class.  
| 4.   |        | • If the Personnel member is *not* a teacher,  
       |        |   o Leave “No selection” in the Class Definition field.  
       |        | • Special Program will auto-populate if defined for the selected class.  
| 5.   |        | • For Role Identification,  
       |        |   o Select Administrator, Scorer, or Teacher.  
       |        |   o Select the Start Date when the role begins.  
       |        |   o Leave End Date empty if the role will continue across program years.  

"Personnel"
## Personnel

<table>
<thead>
<tr>
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</table>
| 6.   | ![Toolbar Screen](image1.png) | • From the **Toolbar** at top,  
  o Click **Save**. |
| 7.   | ![Functional Role Screen](image2.png) | • Return to the **Personnel** record.  
  o Click the **Red X Box** on the **Functional Role** tab and return to the **Personnel** record. |
| 8.   | ![Personnel Screen](image3.png) | • The **Functional Role** record is now listed with the **Personnel** record.  
  
  **Note**! **Personnel** may have more than one **Functional Role** at the agency. |

### Employment Records

The next record to add for **Personnel** is information about their employment. **Personnel** may have more than one **Employment Record** to identify different types of employment within the agency.

### Professional Status

The last record to add for **Personnel** is information about their professional status.

Detailed steps for adding **Personnel Employment** and **Professional Status** records are available from the training materials library on the CASAS website at [Home > Training and Support](#).
### ACTIVITY: Access the New Teacher’s Class

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | ![TE Icon](image) | • At top left of your screen,  
  o Click the TE icon.  
  o Click Disconnect. |
| 2.   | ![Teacher Login](image) | • Log in as the Teacher.  
  o Enter Credentials.  
  o Click Connect. |
| 3.   | ![Menu Bar](image) | • From the Menu Bar at top,  
  o Click Organization.  
  o Click Classes.  
  o Click Instances. |
| 4.   | ![Class List](image) | • The teacher’s Class will display in the list.  
  • Double-click on the Class to open the record. |
| 5.   | ![Class Details](image) | • With access to Classes, teachers can –  
  o Record Attendance.  
  o Enroll students and update their Status in class.  
  o View Tests taken by students enrolled in the class.  
  o Generate Student & Class Reports. |
| 6.   | ![Note](image) | • **Note!** For training, you will need to Disconnect from TE and then Connect again with your Admin account to proceed with the next steps. |
Steps to Add Student Records

The recommended approach to adding and editing Student records is from the Demographics list of records. Using the Navigator to add or edit ‘child’ records will ensure data entry accuracy with prepopulated ‘parent’ information.

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | ![Menu Bar](image1) | • From the **Menu bar**,  
  o Click **Records**.  
  ▪ Select **Students**.  
  ▪ Click **Demographics**. |
| 2.   | ![Toolbar](image2) | • From the **Toolbar** at top left of the **Demographics** page,  
  o Click **New**. |
| 3.   | ![New Tabbed Page](image3) | • A new tabbed page opens to input **Student Information**.  
  o Select the **Site** where the student will have activity.  
  • Enter the minimum (recommended) **Identification**.  
  o **Student ID**.  
  o **First/Last Name**.  
  o **Gender**.  
  o **Birth Date**.  

*Note!* Use eTests Online to collect and ‘fill-in’ remaining **Demographics**, or add students in TE automatically.
### Student Records

#### Steps to Add Test Records

Use the Navigator from the student’s Demographics record to add a Test record. Again, this recommended approach will ensure data entry accuracy with prepopulated ‘parent’ information about the student.

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | ![Screen](image) | • From the Navigator at left,  
  o Click Tests.  
• From the student’s Tests lister,  
  o Click New. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td><img src="https://example.com/image1.png" alt="Test Information Screen" /></td>
</tr>
</tbody>
</table>

**Note!**
Assigning a Class to the Test Record is no longer necessary or required because TE tracks student activity through their ‘unique’ ID.

- A new tabbed page opens to input Test information.
- The Test record prepopulates with Site, Program Year and Student fields automatically.
- Enter the Assessment Date.
  - Use the drop-down calendar
  - Or type the Date.

- For Assessment Information,
  - Click the Form field down-arrow, and select a Test Form.
    - Type to Search.
    - Scroll to Select.
    - Select from Lister.

**Scoring Option #1**
- Check Score Override.
  - Enter the Raw Score.
- Scale Score auto-populates after saving the record.

**Scoring Option #2**
- You also have the option of entering item responses if you plan to generate performance reports from test results.
  - Leave Score Override unchecked
  - Enter Responses to each test item.
- Raw and Score Scale auto-populate after saving the record.
- Click Save from the Toolbar at top.
### Student Records

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click the Red X Box on the Test record tab and return to the student’s Demographics record.</td>
<td></td>
</tr>
</tbody>
</table>
| 6.   | You will now see the new record in the student’s Tests lister.  
  - Click Refresh in the Tests lister Toolbar if needed to display Tests. |
| 7.   | Click the Red X Box on the Student record tab and return to the Demographics lister.  
  - Click the Filter icon in the Student ID column.  
    - Enter the Student ID.  
    - Click OK. |
| 8.   | The new Student record is now in the Demographics list of records for the current program year. |

**ACTIVITY:** Sign back on as your fictitious Teacher to Enroll the Student in your Class and see the student’s Test record. Note: Student record must be at the Class Site to enroll and see Tests taken at any site.
Steps to Exit TE

To ensure data is secure and confidential and that unauthorized personnel are unable to gain access to personal data, it is important to disconnect from the server before exiting TE.

<table>
<thead>
<tr>
<th>Step</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1.   | ![Screen 1](image1.png) | - When you are finished working in TE, or at any time you have several tabbed pages open,  
  - Click **Pages** at top right.  
  - From the drop-down menu,  
    - Click **Close All Pages**. |
| 2.   | ![Screen 2](image2.png) | - At top left of your screen,  
  - Click the TE icon.  
  - Click **Disconnect**. |
| 3.   | ![Screen 3](image3.png) | - Click the TE icon again.  
  - Click **Exit**.  
  - Or click the **Red X Box** at top right of your screen. |
CASAS Contact Information

Mail: CASAS  
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Website: www.casas.org

Telephone: (858) 292-2900 or toll free (800) 255-1036

Fax: (858) 292-2910

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- General questions: casas@casas.org
- Training questions: training@casas.org
- Ordering questions: orders@casas.org
- Field Testing Opportunities: fieldtesting@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 to provide technical assistance for successful online implementation and uninterrupted test delivery.

- 7:00 am – 5:00 pm (Pacific Time)
- Monday – Friday
- techsupport@casas.org
- (858) 292-2900 or toll free (800) 255-1036, option 2
Thank you for attending!