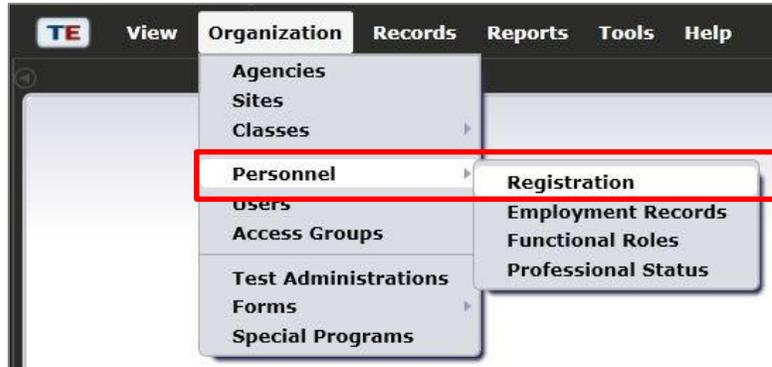


Adding Personnel Registrations

This document provides a step-by-step tutorial on how to add a **Personnel Record** to TOPSpro Enterprise. Each personnel record includes a **Registration**, **Functional Role**, **Employment Record**, and **Professional Status** information.

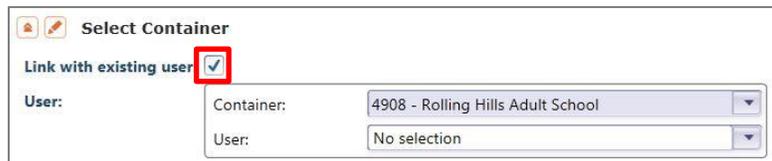
- 1) From the **Organization** menu, select **Personnel** -> **Registration**.



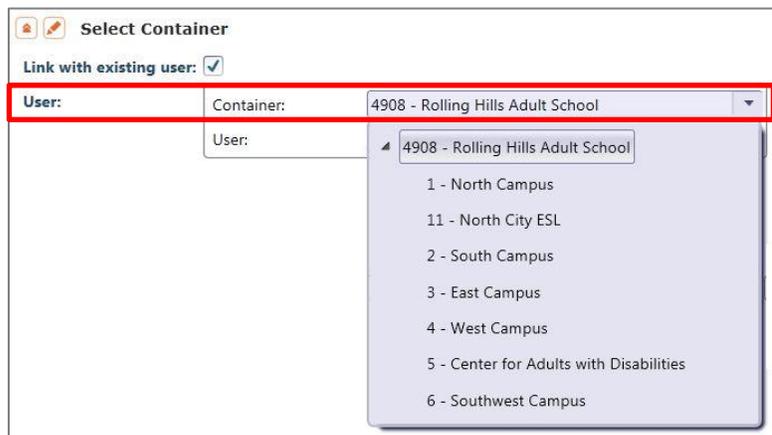
- 2) Click **New** to add a personnel registration record.



- 3) If a user account exists for the personnel member, check **Link with existing user**.



- a. Select the user **Container** wherein the personnel member has a user account.



- ❖ **Note!** If a user account does *not* exist for which to link the personnel member, skip to **Step 5**.

4) Select the **User** from the drop-down list of accounts.

a. To search for a user,

i. Click

Select from Lister...

ii. Click **User**

iii. Click **Pick**.

b. Skip to **Step 6**.

Container	User Account	First & Last Name
4908 - Rolling Hills Adult School	bsmith@rhas.org	Bob Smith
4908 - Rolling Hills Adult School	jsmith@rhas.org	John Smith
4908 - Rolling Hills Adult School	msmith@rhas.org	Mary Smith
4908 - Rolling Hills Adult School	ssmith@rhas.org	Sue Smith

5) Select the **Container** wherein the personnel member has an association.

6) Enter **Personnel Identification**.

a. If linked with an existing user account, this information will populate.

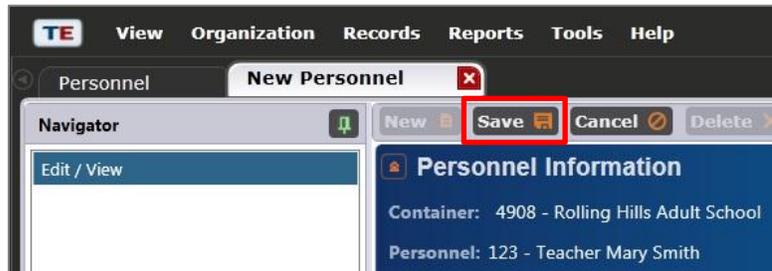
i. Enter **Personnel ID**.

ii. Add or correct information.

b. If *not* linked with an existing user account,

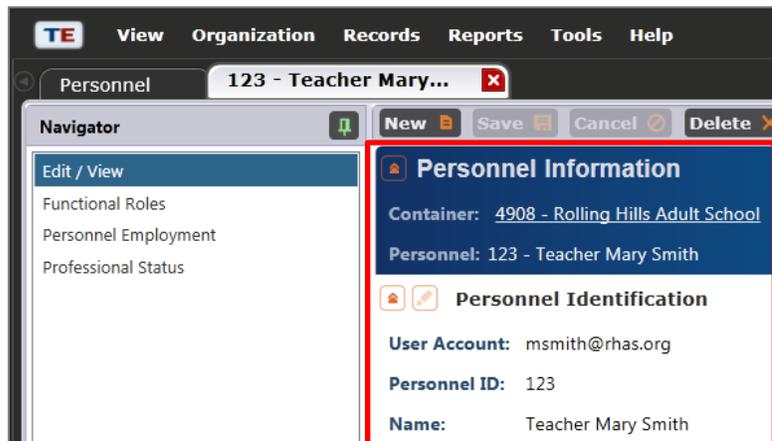
i. Enter **Personnel Identification**.

7) Click .

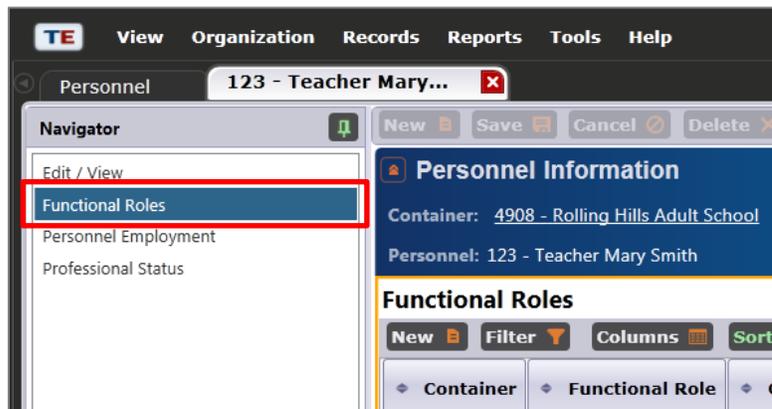


8) Review saved **Personnel Registration**.

a. Click  or  to edit saved information.



9) From the personnel record **Navigator**, click **Functional Roles**.



❖ **Note!** To continue, skip to **Step 6 on Adding Functional Roles**.

Adding Functional Roles

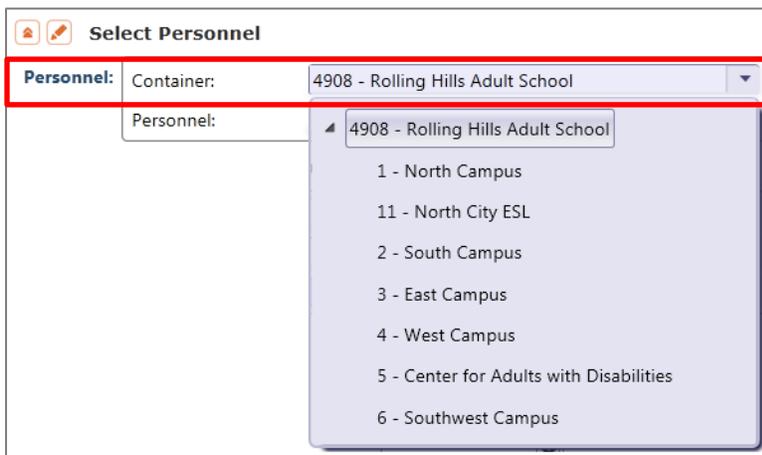
This document is a continuation of a step-by-step tutorial on how to add **Functional Roles** to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to **Step 6**.



- 1) From the **Organization** menu, select **Personnel -> Functional Roles**.

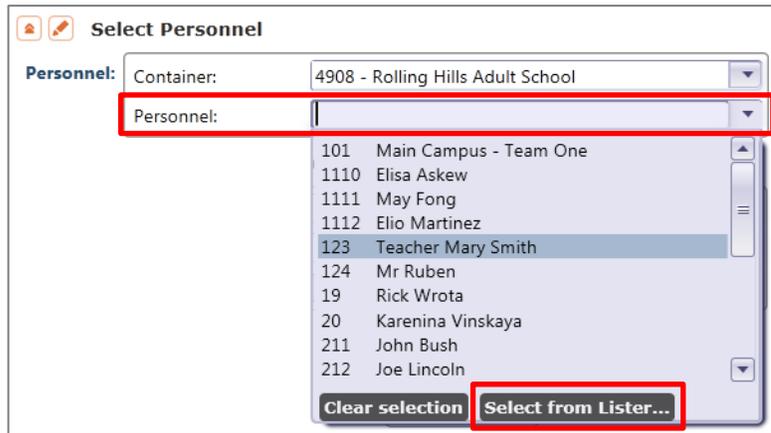


- 2) Click **New** to add a functional role for the personnel member.



- 3) Select the personnel **Container** to locate the personnel member.

4) Select the **Personnel** member from the drop-down list.



a. To search for a personnel member,

i. Click



ii. Click **User**

iii. Click

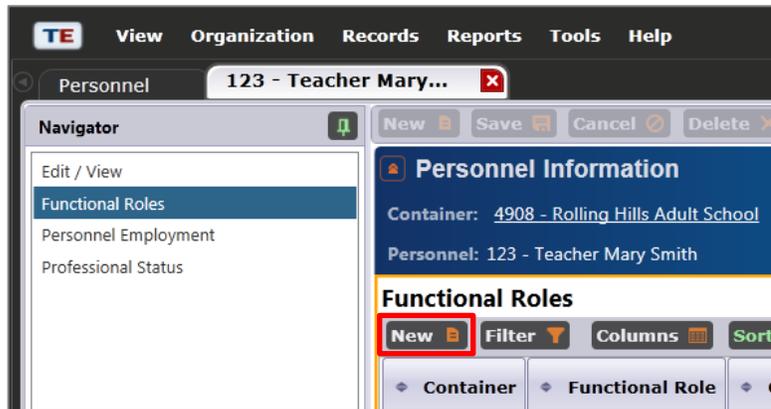
Container	Personnel ID	Name
4908 - Rolling Hills Adult School	101	Main Campus - Team One
4908 - Rolling Hills Adult School	1110	Elisa Askew
4908 - Rolling Hills Adult School	1111	May Fong
4908 - Rolling Hills Adult School	1112	Elio Martinez
4908 - Rolling Hills Adult School	123	Teacher Mary Smith
4908 - Rolling Hills Adult School	124	Mr Ruben

5) Skip to Step 7



❖ **Note!** Begin here if continuing from instructions on **Adding Personnel Registrations**.

6) Click to add a functional role for the personnel member.



7) Select the **Container** wherein the personnel member has a functional role.



Select container/associations for role

Container: 1 - North Campus

Class Definition: [Empty]

Special Program:

- 1 ABE
- 1001 ABE Intermediate
- 1002 ABE - CEC
- 101 AM ABE
- 1106 ESL - Beginning
- 1115 ESL - Intermediate
- 1116 ESL - Intermediate - High
- 12345 ESL - proxy
- 210 Concurrent - afternoon
- 3 GED

Clear selection | Select from Lister...

8) If the personnel member is a teacher, select the **Class Definition** from the drop-down list that corresponds to the functional role.

❖ **Note!** If the personnel member is *not* a teacher, leave **No selection** in the class definition field.

a. To search for a class definition,

- i. Click **Select from Lister...**
- ii. Click **Class definition**.
- iii. Click **Pick**.

Pick | Cancel Pick | New | Filter | Columns | Sort | Delete

Site	Class ID	Class Description	Extended ID
1 - North Campus	1	ABE	
1 - North Campus	1001	ABE Intermediate	
1 - North Campus	1002	ABE - CEC	
1 - North Campus	101	ABE	AM
1 - North Campus	1106	ESL - Beginning	

Select container/associations for role

Container: 4908 - Rolling Hills Adult School

Class Definition: 101 - AM - ABE

Special Program: No selection

9) **Special Program** will auto-populate if defined for the selected class definition.

Role Identification

Functional Role: Administrator Teacher

Start Date: 1/22/2013

End Date: [Empty]

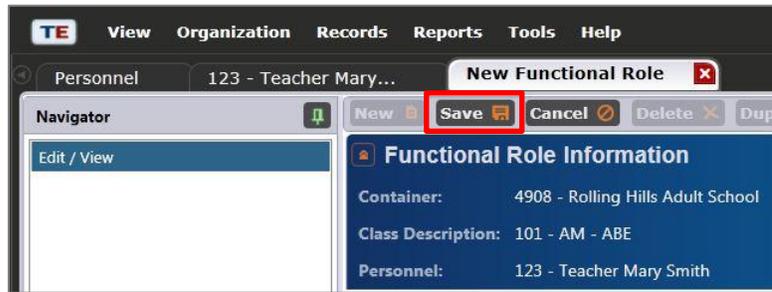
10) Enter **Role Identification** information.

- a. Select **Functional Role**.
- b. Select **Start Date**.
- c. Select **End Date**.
- d. When **Role is Related to Instructional Program**, this information becomes non-selectable.

Role is Related to Instructional Program:

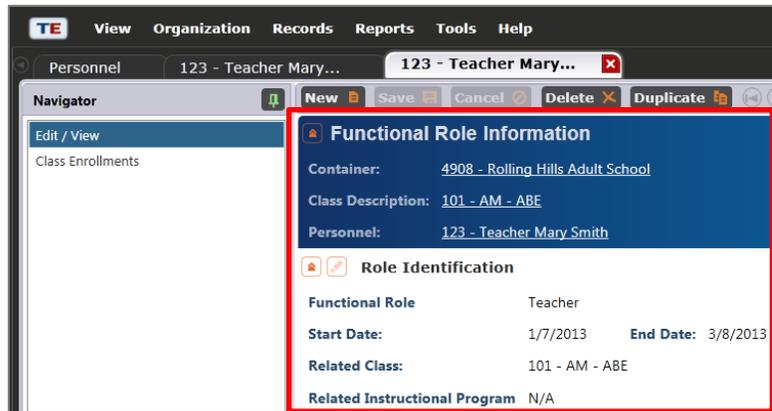
- N/A
- High School Diploma
- Adults w/Disabilities
- Other Program
- Basic Skills (ABE)
- GED
- Health & Safety
- ROCP
- ESL
- Spanish GED
- Home Economics
- ESL/Citizenship
- Career/Tech Ed
- Parent Education
- Citizenship
- Workforce Readiness
- Older Adults

11) Click .



12) Review saved **Functional Role Information**.

a. Click  or  to edit saved information.



13) Click  to close the personnel member's **Functional Role Tab** and:

a. Continue with **Step 14** if at the personnel record.

– OR –

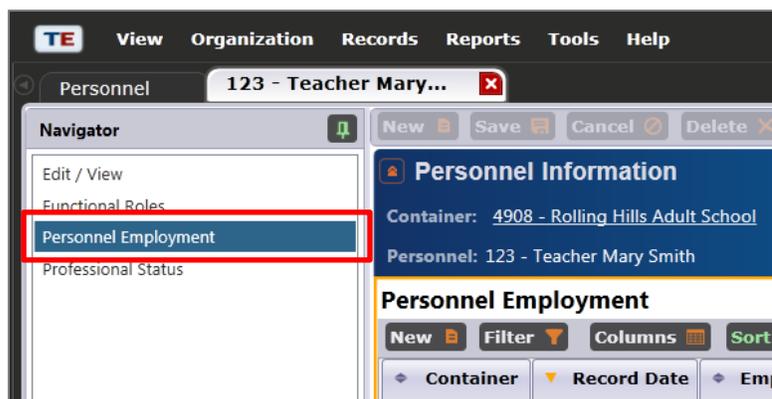
b. Continue to **Step 1** on **Adding Employment Records**

i. Click  to close the **Functional Roles Lister** tab.



14) From the personnel record **Navigator**, click **Personnel Employment**.

❖ **Note!** From here, skip to **Step 6** on **Adding Employment Records**.



Adding Employment Records

*This document is a continuation of a step-by-step tutorial on how to add an **Employment Record** to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to **Step 6**.*



- 1) From the **Organization** menu, select **Personnel** -> **Employment Records**



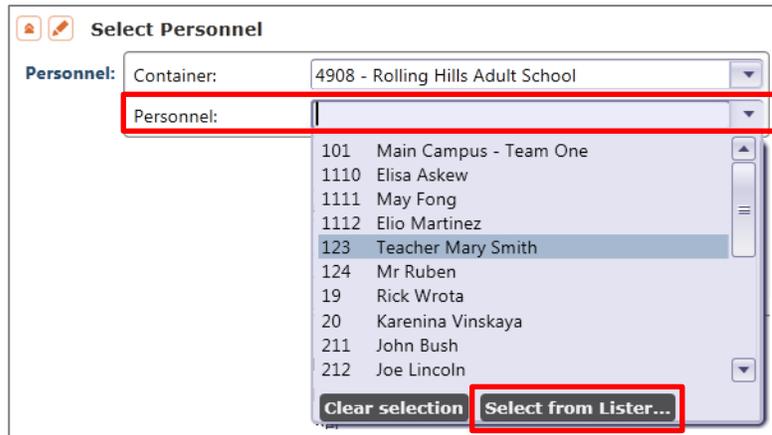
- 2) Click **New** to add an employment record for a personnel member.



- 3) Select the personnel **Container** to locate the personnel member.

4) Select the **Personnel** member from the drop-down list.

- a. To search for a personnel member,
 - i. Click .
 - ii. Click **Personnel** member.
 - iii. Click .



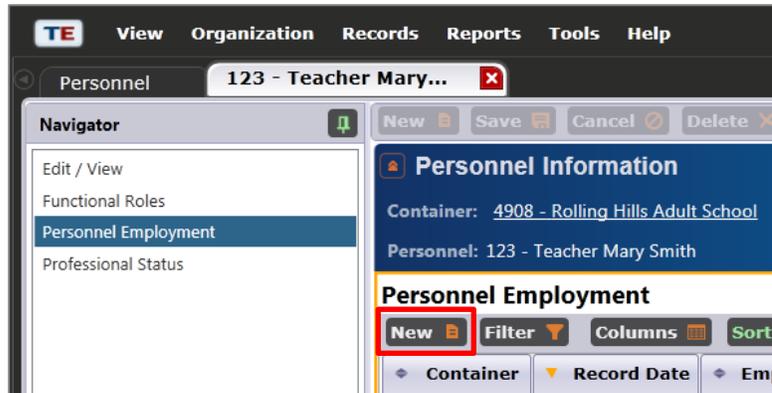
Container	Personnel ID	Name
4908 - Rolling Hills Adult School	101	Main Campus - Team One
4908 - Rolling Hills Adult School	1110	Elisa Askew
4908 - Rolling Hills Adult School	1111	May Fong
4908 - Rolling Hills Adult School	1112	Elio Martinez
4908 - Rolling Hills Adult School	123	Teacher Mary Smith
4908 - Rolling Hills Adult School	124	Mr Ruben

5) Skip to Step 7

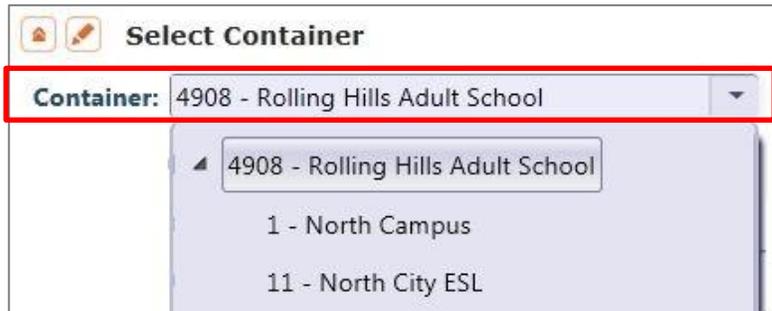


❖ **Note!** Begin here if continuing from instructions on **Adding Functional Roles**.

6) Click to add a functional role for the personnel member.



7) Select the **Container** wherein the personnel member has employment.



Employment Identification

Record Date: 7/1/2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	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

8) Enter **Employment Identification**.

a. Select **Record Date**.

b. Select **Employment Type**.

Employment Type:

N/A Local Paraprofessional

State-level Administrative/Supervisory/Ancillary Services

Local-level Administrative/Supervisory/Ancillary Services

Local Teacher

Local Counselor

Job Type:

N/A

Full-time

Part-time

Unpaid volunteer

c. Select **Job Type**.

TE View Organization Records Reports Tools Help

Personnel 123 - Teacher Mary... New Personnel Empl...

Navigator New Save Cancel Delete Dupli

Personnel Employment Information

9) Click **Save**.

TE View Organization Records Reports Tools Help

Personnel 123 - Teacher Mary... 123 - Teacher Mary...

Navigator New Save Cancel Delete Dupli

Personnel Employment Information

Container: 4908 - Rolling Hills Adult School

Personnel: 123 - Teacher Mary Smith

Employment Identification

Record Date: 7/1/2012

Employment Type: Local Teacher

Job Type: Full-time

10) Review saved **Personnel Employment Information**.

a. Click or **Edit Mode** to edit saved information.

11) Click  to close the personnel member's **Employment Record Tab** and:



a. Continue with **Step 12** if at the personnel record.

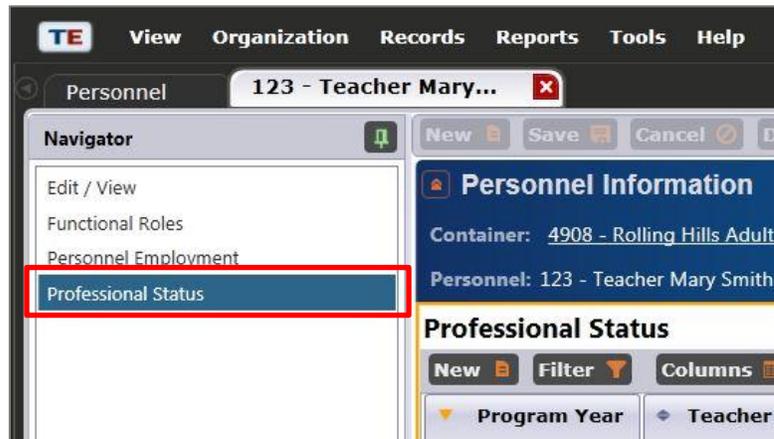
– OR –

b. Continue to **Step 1** on **Adding Professional Status**.



i. Click  to close the **Personnel Employment Lister** tab.

12) From the personnel record **Navigator**, click **Professional Status**.



❖ **Note!** From here, skip to **Step 6** on **Adding Professional Status**.

Adding Professional Status

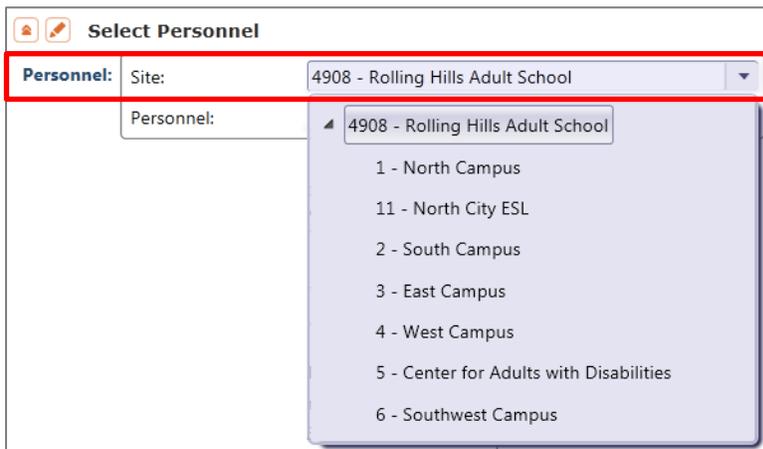
This document is a continuation of a step-by-step tutorial on how to add Professional Status to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to Step 6.



- 1) From the **Organization** menu, select **Personnel** -> **Professional Status**.

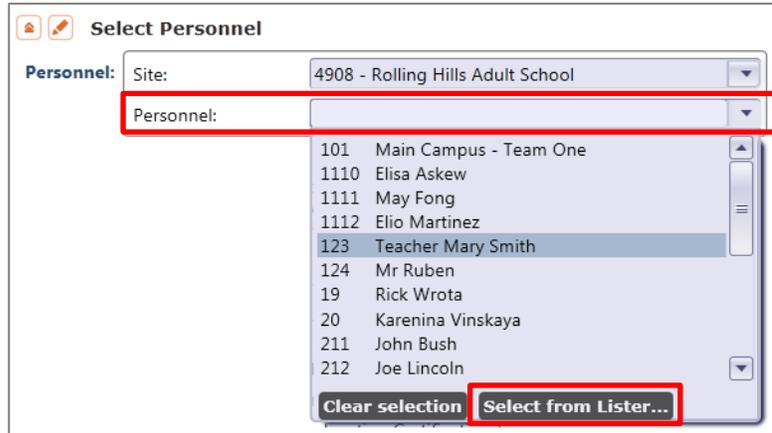


- 2) Click **New** to add a professional status record for the personnel member.



- 3) Select the personnel **Site** to locate the personnel member.

4) Select the **Personnel** member from the drop-down list.



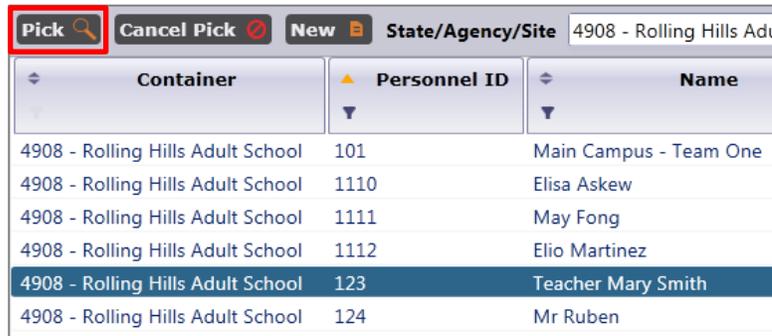
a. To search for a personnel member,

i. Click



ii. Click **Personnel**.

iii. Click .

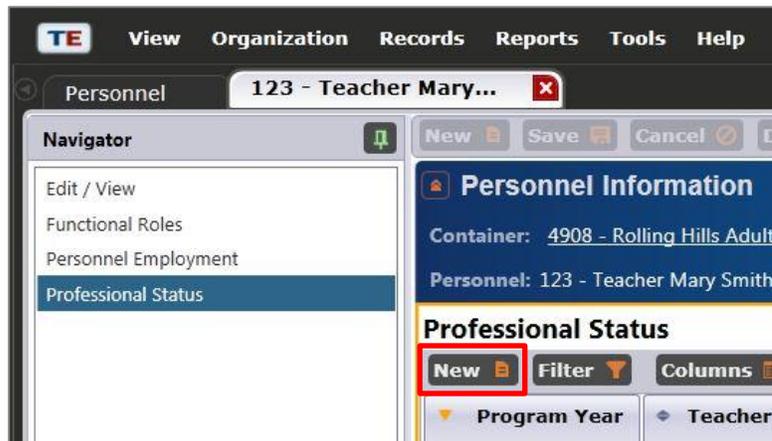


5) Skip to Step 7.



❖ **Note!** Begin here if continuing from instructions on **Adding Employment Records**.

6) Click to add professional status for the personnel member.



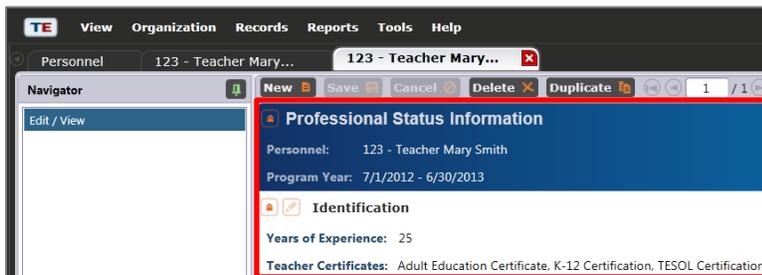
7) Select a **Program Year** to record the personnel member's professional status.



- 8) Enter professional status **Identification**.
 - a. Enter number for **Years of Experience**.
 - b. Select **Teacher Certificates**.



- 9) Click .



- 10) Review saved **Professional Status Information**.
 - a. Click  or  to edit saved information.



- 11) Click  to close the personnel member's **Professional Status Tab** and:
 - a. Continue with **Step 12** if at the personnel record.

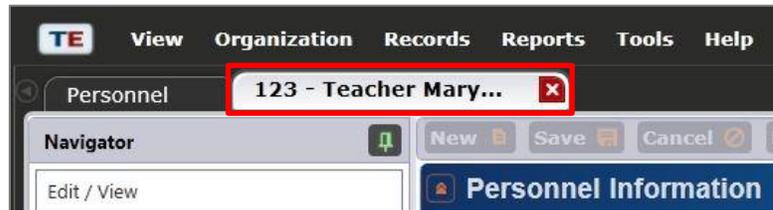
– OR –

- b. Continue to **Step 1** on **Adding Personnel Registration** to add more personnel records.



- i. Click  to close the **Professional Status Lister** tab.

- 12) Click  to close the **Personnel Record Tab**.



- 13) Click  to add more personnel records
- a. Return to **Step 3 on Adding Personnel Registration**.

– OR –

- b. Click  to close the **Personnel Lister** tab if finished.



- ❖ **Note!** This concludes the setup of a Personnel Record.