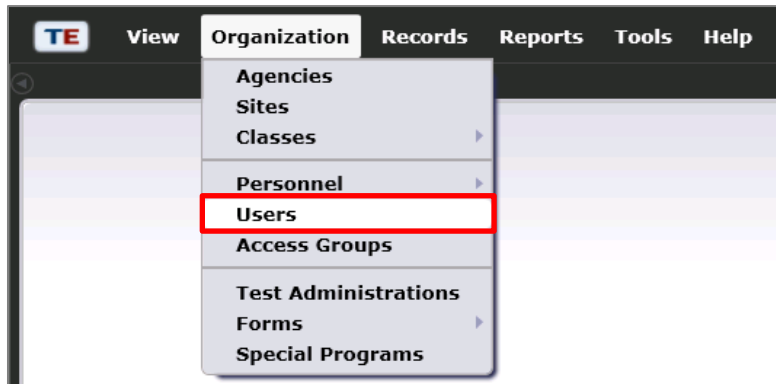


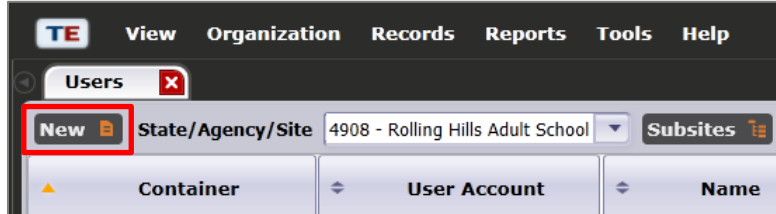
Adding User Accounts

This document provides a step-by-step tutorial on how to add a new **User** for access to TOPSpro Enterprise. To enable access to CASAS eTests Online, please send an e-mail to the CASAS Technology Support Team (techsupport@casas.org) with “New User Request” in the subject line.

- 1) From the **Organization** menu, select **Users**.
 - a. To display a list of users, click **Refresh** if auto-refresh is not enabled.
 - b. To enable auto-refresh, click the **TE icon**, select **Options - > Listers**, and check “**All Listers Auto-Refresh**”, then click **OK**.



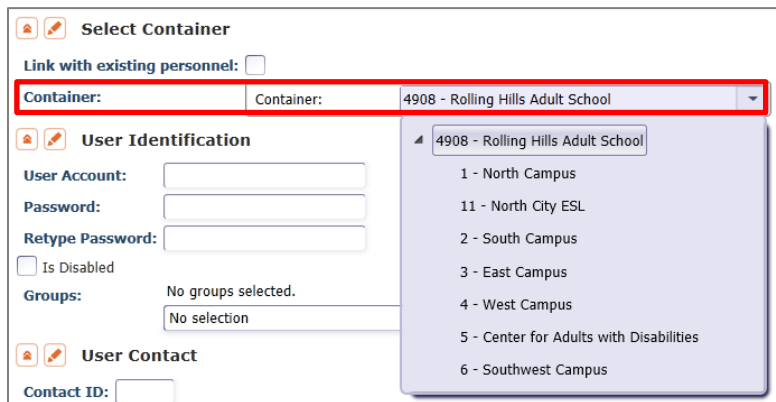
- 2) Click **New**.



- 3) Check “**Link with existing personnel**” if a personnel registration record pre-exists (refer to **Personnel Records**).



- 4) Select the **Container** within which the user should have access.
 - ❖ **Note:** If the container remains at the agency level (e.g. 4908 – Rolling Hills Adult School), the user has access to data across all sites (e.g. 1 – North Campus, 11 – North City ESL, etc.).



❖ **Note:** You have the option to disable an account without deleting it by checking **Is Disabled**.

❖ **Note:** Contact CASAS to add the **User** to a [CASAS Controlled Access Group](#) (i.e. CASAS eTests Coordinators and Proctors). After you **Save** the **User** account, send an e-mail to the **CASAS Technology Support Team** (techsupport@casas.org) with “**New User Request**” in the subject line.

❖ **Note:** If the **User** is *not* added to an **Access Group**, then you will need to enable rights to **Menus** and **Data**. Please continue with **Enabling Access Rights** instructions before saving the record.

- 5) Enter **User Identification**:
 - a. A **User Account** name for login.
 - i. Use e-mail addresses when users are accessing CASAS eTests Online.
 - b. An initial **Password**, which the user can change later.
 - c. **Retype Password**.

- 6) You have the option to **Add** the **User** to an **Access Group** with pre-defined rights to menus and data (refer to **Access Groups – [Creating Access Groups](#)**).

❖ **Note:** You can also add **Users** from the **Access Group**.

- 7) Enter **User Contact** information.
 - a. Please be sure to enter **Email** and **State**. This is important to ensure online users receive notifications from CASAS.

- 8) Click **Save** when the new **User** is added to an **Access Group** and no other setup is necessary.

Enabling Access Rights

A **User** may belong to multiple **Access Groups**. In such case, 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.

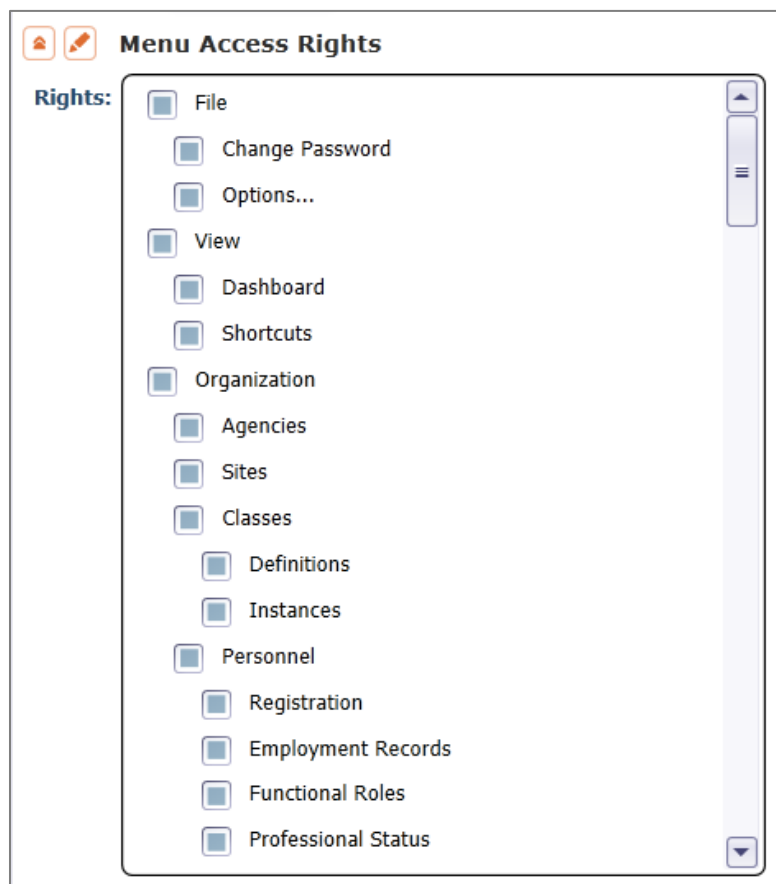
- **Access Rights** from an **Access Group** defined at the evaluated **Container** will take precedence over rights defined at **Containers** above the evaluated container.
- **User** access to various data may differ if the **Access Groups** for which the **User** is a part have different rights set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

1) Click appropriate box(es) to change the **Menu Access Right** state.

a. **By default**, shaded boxes indicate that no specific **Menu Access Rights** are set for this **User**, which means all rights are granted.

❖ **Note:** If the **User** is a member of an **Access Group**, shaded boxes indicate that access rights to menus are inherited from the associated group.

b. Specify **Menu Access Rights** for a **User** *only* to restrict or open access where otherwise the **Access Group** denies.



❖ **Note:** Refer to [Assessment and Database Management Features](#) for an outline of Basic vs. Enhanced access to menus and data.

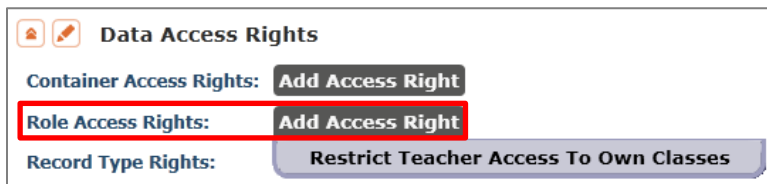


2) Select **Container Access Rights** (if applicable).

- a. Depending on selected access right, the **User** is allowed to see records from other containers than the default one where the **User** is created
- b. Refer to notes (below) for **Container** level logic.
 - i. If “*View Records From Base Container*” is selected, the **User** is allowed to view data registered at base-level container.
 - ii. If “*View Records From Parent Container*” is selected, the **User** is allowed to view data registered in the parent container of the current container and in entire container tree below the parent container.
 - iii. If “*View Records from Sibling Container*” is selected, the **User** is allowed to view data registered in any container having the same parent as the current container.

❖ **Notes:**

- **Base Container** for any **Site** or **Sub-Site** defined **User** is the **Agency-Level Container**.
- **Base Container** for an agency-defined **User** is the **State-Level Container**.
- **Base Container** for a state-defined **User** is the **System-Level Container**.
- **Parent Container** is one level above the **Container** where the **User** is defined.
- **Sibling Container** is any **Container** having the same parent container with the container where the **User** is defined.



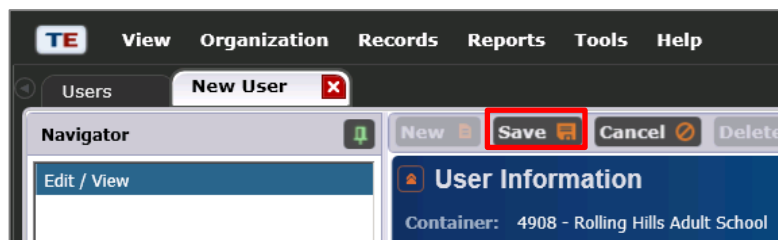
3) If the new **User** is a teacher, you have the option to **Restrict Teacher Access To Own Classes**.

❖ **Note:** Functionality is not yet implemented for this option.


- 4) To enable **Record Type Rights** for access to data contained in the **Menu(s)** selected for the **User**, click the corresponding box(es) to enable.
 - a. **By default**, shaded boxes indicate that no access rights to individual record types are set for this **User**, which means all rights are denied.
 - ❖ **Note:** 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.
 - i. **List Records** –provides access to list records only.
 - ii. **View Record** – provides access to view details of listed/selected/filtered records.
 - iii. **Create/Update/Delete Record** – provides access to add, edit, and delete records.

Record Type Rights:							
List / Record Type	List Records	View Record	Create Record	Update Record	Delete Record	Check All	
Agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	
Test Administrations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Core Performance Measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Core Performance Surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	
Students	<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"/>	
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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Additional Assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>	
Reports Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- 5) Click **Save** to close the record.



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.