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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| 1.   |        | From the Menu bar,  
|      |        |   - Click **Organization**.  
|      |        |     - Select **Users**. |
| 2.   |        | A tabbed page opens to the list of **User** records.  
|      |        |   - From the **Toolbar** at top left of the list.  
|      |        |     - Click **New**. |
### User Access

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| 3.   | ![User Information](image1.png) | - 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. |
|      | ![Select Container](image2.png) | ![Select Container](image2.png)  
- 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](image3.png) | ![User Identification](image3.png)  
- **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.   | ![No groups selected](image4.png) | ![No groups selected](image4.png)  
- 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.  
- **After selecting an Access Group**,  
  - Click Add at right of the selected Group. |
### User Access

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| 8.   | ![Screen 1](image1) | - 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 2](image2) | - Add **Contact Information** for the new User.  
  - The minimum information required for adding an account is:  
    - First Name.  
    - Last Name.  
    - Email |
| 10.  | ![Screen 3](image3) | - No other setup is needed for the new **User** when added to **Access Groups**.  
  - Click **Save** from the **Toolbar** at top. |
| 11.  | ![Screen 4](image4) | - Click the **Red X Box** on the **User** record tab and return to the lister. |
| 12.  | ![Screen 5](image5) | - Use the **First/Last Name** column filter to locate the new **User** among the list of records. |
Defining Group Access Rights

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

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| 1.   | ![Screen](image1.png) | • From the **Menu bar**,  
  o Click **Organization**.  
  • Select **Access Groups**. |
| 2.   | ![Screen](image2.png) | • The tabbed page opens listing **Groups** for Agencies to manage User **Access** to TE.  
  • TE Data Managers may –  
  o **Edit, Rename, or Duplicate** the default set of groups added by CASAS when setting up a new online account. |
| 3.   | ![Screen](image3.png) | • TE Data Managers may also –  
  o **Add new TE Access Groups** to manage users based on their role at the Agency, such as a School Counselor or the Registrar. |

13. • Click the **Red X Box** and close the **Users** lister.
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| 4.   | ![Access Group Screen](image1) | • 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](image2) | • 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**.