

Steps to Add User Records

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 other staff access to TE and eTests as appropriate. CASAS recommends adding User records at the agency level for ease with managing records and user access.

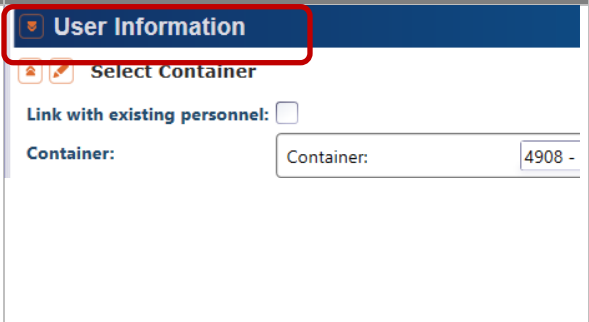
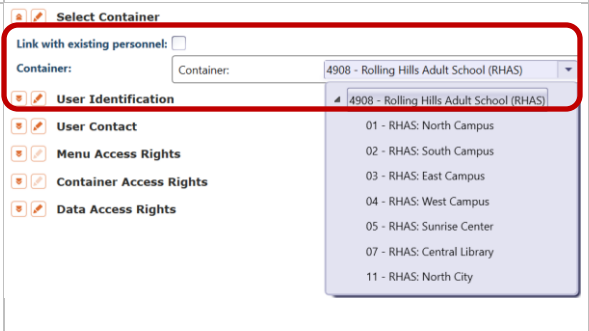
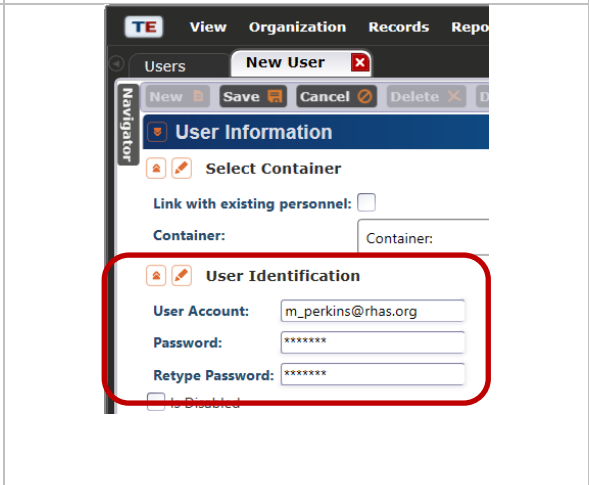
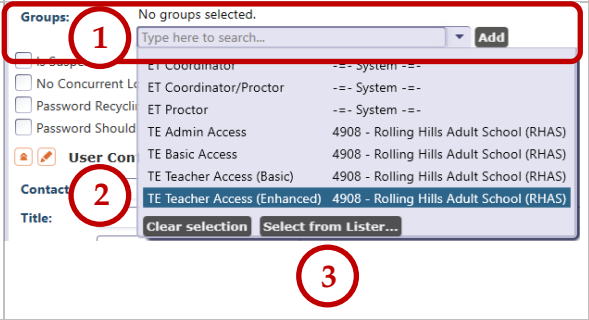
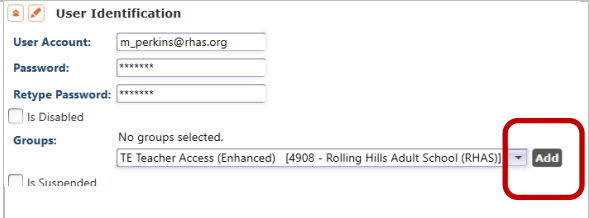
Access to TE

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

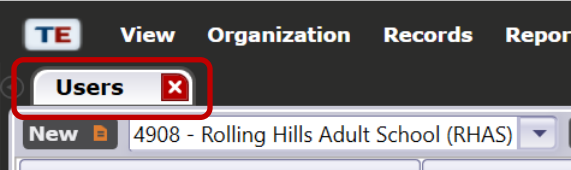
Access to eTests

- May only grant 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 administering online tests.

Step	Screen	Description
1.		<ul style="list-style-type: none"> • From the Menu bar, <ul style="list-style-type: none"> ○ Click Organization. <ul style="list-style-type: none"> ▪ Select Users.
2.		<ul style="list-style-type: none"> • A tabbed page opens to the list of User records. • From the Toolbar at top left of the list. <ul style="list-style-type: none"> ○ Click New.

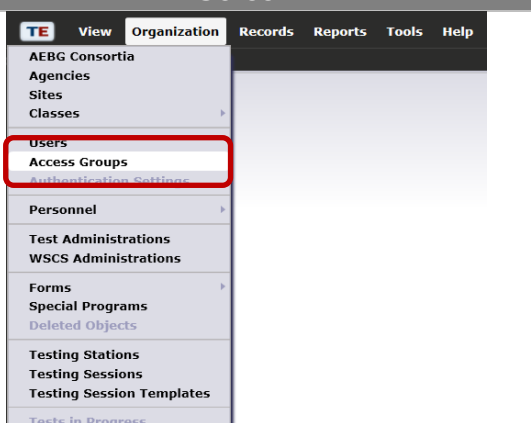
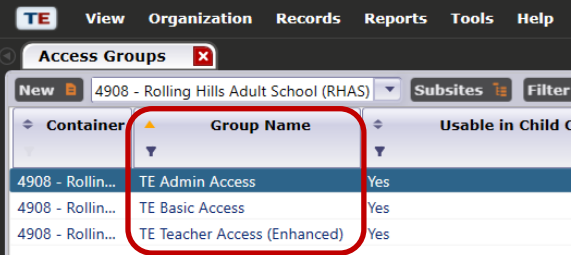
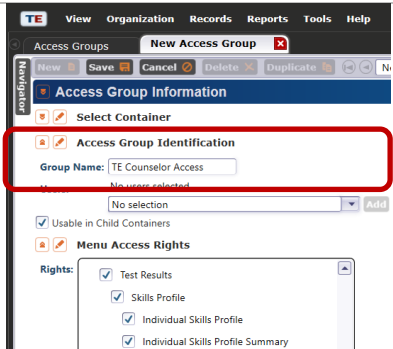
Step	Screen	Description
3.		<ul style="list-style-type: none"> • Check Link with existing personnel – <ul style="list-style-type: none"> ○ When a Personnel record exists in your online account. ○ If a record does not exist, you will have the option to link accounts when adding the Personnel record.
4.		<ul style="list-style-type: none"> • Click the Container field down-arrow. <ul style="list-style-type: none"> ○ Select the container to add the new User record. <p>Note! Add Users at the Agency level when linking accounts with Personnel records.</p>
5.		<ul style="list-style-type: none"> • User Identification will be the login credentials for the new User. <ul style="list-style-type: none"> ○ Enter a Work 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 the first time they log in.
6.		<ul style="list-style-type: none"> • Add the new User to an Access Group. <ul style="list-style-type: none"> ○ You have three options to do this. • Click the Group field down-arrow, <ol style="list-style-type: none"> 1. Type to Search for the Group. 2. Scroll to Select the Group. 3. Select [Group] from Lister.
7.		<ul style="list-style-type: none"> • After selecting an Access Group, <ul style="list-style-type: none"> ○ Click Add at right of the selected Group.

Step	Screen	Description
8.		<ul style="list-style-type: none"> • If the new User will need access to eTests to: <ul style="list-style-type: none"> ○ Manage online testing (Coordinator). ○ Administer online tests (Proctor). <ul style="list-style-type: none"> ▪ Add the new user to the access group that matches with their certification.
9.		<ul style="list-style-type: none"> • Add Contact Information for the new User. • The minimum information required for adding an account is: <ul style="list-style-type: none"> ○ First Name. ○ Last Name. ○ Email
10.		<ul style="list-style-type: none"> • No other setup is needed for the new User when added to Access Groups. • From the Toolbar at top, <ul style="list-style-type: none"> ○ Click Save.
11.		<ul style="list-style-type: none"> • Click the Red X Box on the User record tab and return to the lister.
12.		<ul style="list-style-type: none"> • Use the First/Last Name column filter to locate the new User among the list of records.

Step	Screen	Description
13.		<ul style="list-style-type: none"> Click the Red X Box and close the Users lister.

Group Access Rights

For ease with managing **Users**, CASAS will add a default set of **Access Groups** to a new account.

Step	Screen	Description
1.		<ul style="list-style-type: none"> From the Menu bar, <ul style="list-style-type: none"> Click Organization. <ul style="list-style-type: none"> Select Access Groups.
2.		<ul style="list-style-type: none"> The tabbed page opens listing Groups for Agencies to manage User Access to TE. TE Data Managers may – <ul style="list-style-type: none"> Edit, Rename, or Duplicate the default set of groups added by CASAS when setting up a new online account.
3.		<ul style="list-style-type: none"> TE Data Managers may also – <ul style="list-style-type: none"> Add new TE Access Groups to manage users based on their role at the Agency, such as a School Counselor or the Registrar. <p>Note! Establish and maintain groups at the agency level (recommended).</p>

Step	Screen	Description
4.		<ul style="list-style-type: none"> Groups have access to TE according to the rights enabled in three areas: <ol style="list-style-type: none"> Menu Access Rights <ul style="list-style-type: none"> Defines access to menus and submenus. Container Access Rights <ul style="list-style-type: none"> Defines access to sites and sub-sites. Data Access Rights <ul style="list-style-type: none"> Defines read-only access, or rights to create, update, and/or delete data.
5.		<ul style="list-style-type: none"> 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, <ul style="list-style-type: none"> Generate Reports for their own classes. Manage their Class Enrollment. Record Attendance. View Test results taken by students enrolled in their class.