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.

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<tr>
<th>Step</th>
<th>Screen Description</th>
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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**. |
### Adding Users

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<td>3.</td>
<td><img src="image" alt="User Information" /></td>
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**Description**

- 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.

- **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.

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<td><img src="image" alt="Select Container" /></td>
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**Description**

- **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.

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**Description**

- **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.**

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<td>7.</td>
<td><img src="image" alt="User Identification" /></td>
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**Description**

- **After selecting an Access Group,**
  - Click **Add** at right of the selected **Group**.
## Adding Users

### Step 8

**Screen**

- If the new User will need access to eTests to:
  - Manage online testing (Coordinator).
  - Administer online tests (Proctor).
    - Add the new user to the access group that matches with their certification.

### Step 9

- Add Contact Information for the new User.
- The minimum information required for adding an account is:
  - First Name.
  - Last Name.
  - Email

### Step 10

- No other setup is needed for the new User when added to Access Groups.
- From the Toolbar at top,
  - Click Save.

### Step 11

- Click the Red X Box on the User record tab and return to the lister.

### Step 12

- Use the First/Last Name column filter to locate the new User among the list of records.
Adding Users

Group Access Rights

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

1. From the Menu bar,
   - Click Organization.
     - Select Access Groups.

2. 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. 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.

*Note!* Establish and maintain groups at the agency level (recommended).
### Adding Users

#### Step 4

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| ![Group Access Rights](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. |

#### Step 5

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| ![Data Access Rights](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. |