eTests[®] TOPSpro[®]

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.

- From the Organization menu, select Personnel -> Registration.
 - a. To display a list of personnel records, 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** 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.





🔹 🖉 Select	Container		
Link with existi	ng user 🗸		
User:	Container:	4908 - Rolling Hills Adult School	
	Liser.	No selection	





lser:	Container:	4908 - Rolling Hills	Adult School	
	User:			
	<u>_</u> 25	bsmith@rhas.org	Bob Smith	
		jsmith@rhas.org	John Smith	
		msmith@rhas.org	Mary Smith	
		ssmith@rhas.org	Sue Smith	
		Clear selection	Select from Lister	

	Filter T Co	
Container	User Account	• First & Last Name
Y	т	Ŧ
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

Container:	Container:	4908 - Rolling Hills Adult School
		 4908 - Rolling Hills Adult School 1 - North Campus 11 - North City ESL 2 - South Campus
		5 - Cast Campus 4 - West Campus 5 - Center for Adults with Disabilities 6 - Southwest Campus

🔺 🖉 Pers	onnel Identification			
User Account	t: msmith@rhas.org			
Personnel ID:	:			
Title:	Last Name: Smith	Middle Name:	First Name:	Mary

Personnel Identification	
User Account:	
Personnel ID:	
Title: Last Name:	Middle Name: First Name:

- 4) Select the **User** from the dropdown 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.
- 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 Save.



Reports

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Tools Help

Delete

Organization Records

123 - Teacher Mary...

- 8) Review saved **Personnel Registration**.
 - a. Click 🜌 or Edit Mode 💰 to edit saved information.

TE

Personnel

View

- 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**.

View	Organization	Records	Reports	Tools	Help
	Agencies Sites Classes	þ			
	Personnel	Þ	Registr	ation	
	Users		Employ	ment Re	cords
	Access Grou	ips	Functional Roles		
	Test Admini Forms Special Prog	istrations prams	Profess	ional Sta	ntus
	View	View Organization Agencies Sites Classes Personnel Users Access Grou Test Admini Forms Special Prog	ViewOrganizationRecordsAgenciesSitesClassesPersonnelUsersAccess GroupsTest AdministrationsFormsSpecial Programs	View Organization Records Reports Agencies Sites Image: Sites Image: Sites Classes Classes Image: Sites Image: Sites Personnel Registring Registring Users Employ Function Access Groups Function Profess Forms Special Programs Image: Sites	View Organization Records Reports Tools Agencies Sites Image: Sites Image: Sites Image: Sites Image: Sites Sites Classes Image: Sites Image: Sites Image: Sites Image: Sites Personnel Image: Sites Image: Sites Image: Sites Image: Sites Image: Sites View Personnel Image: Sites Image: Sites Image: Sites Image: Sites Users Personnel Image: Sites Image: Sites Image: Sites Image: Sites Image: Sites Imag

TE	View	Organizatio	on I	Records	Reports	Tools	Неір	
I Fun	ctional	Roles 🛛 🛛						
New 🛙	State/	/Agency/Site	4908	- Rolling H	ills Adult Scł	nool 💌	Subsites 🍓	Filte
+ Cor	ntainer	A1 Personne	el ID	• Nam	e 🔺 2 Clas	s ID	Class Desc	ription

🔺 🖍 Sel	Select Personnel				
Personnel: Container: 4908 - Rolling Hills Adult School					
	Personnel:	4908 - Rolling Hills Adult School			
		1 - North Campus			
		11 - North City ESL			
		2 - South Campus			
		3 - East Campus			
		4 - West Campus			
		5 - Center for Adults with Disabilities			
		6 - Southwest Campus			

- From the Organization menu, select Personnel -> Functional Roles.
 - a. To display a list of functional role records, 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 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 Select from Lister.
 - ii. Click User
 - iii. Click Pick.
- 5) Skip to Step 7
-
- Note: Begin here if continuing from instructions on Adding Personnel Registrations.
- 6) Click New to add a functional role for the personnel member.
- 7) Select the **Container** wherein the personnel member has a functional role.

4908 - Rolling Hills Adult School	101
4908 - Rolling Hills Adult School	1110
4908 - Rolling Hills Adult School	1111
4908 - Rolling Hills Adult School	1112
4908 - Rolling Hills Adult School	123
4908 - Rolling Hills Adult School	124

🔺 🖉 🛛 Select Personnel

Personnel:

Cancel Pick 🥝

Container

Personnel: Container:

Pick

٢



Select container/associations for role				
Container:	Container:	4908 - Rolling Hills Adult School 🔹		
	Class Definition:	4908 - Rolling Hills Adult School		
	Special Program:	1 - North Campus		
		11 - North City ESL		
		2 - South Campus		
		3 - East Campus		



4908 - Rolling Hills Adult School

101 Main Campus - Team One

1110 Elisa Askew 1111 May Fong 1112 Elio Martinez 123 Teacher Mary Smith 124 Mr Ruben 19

Rick Wrota

John Bush 212 Joe Lincoln

Karenina Vinskaya

New 🔋 Filter 🍸 Columns 🕅

Personnel ID

\$

Ŧ

Elisa Askew May Fong Elio Martinez **Teacher Mary Smith**

Mr Ruben

Clear selection Select from Lister..

20

211

-

-

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-

Name

Sort 21 Delet

Main Campus - Team On



Container:	Container:	1 - North Ca	mpus	
	Class Definition:			•
	Special Program:	1 	ABE ABE Intermediate ABE - CEC	1
		101 AM 1106	ABE ESL - Beginning	=
		1115 1116	ESL - Intermediate ESL - Intermediate - High	
		12345	ESL - proxy Concurrent - afternoon	
		3	GED	-

Pick 🔍 Cancel Pick	🕗 New 🖹 F	ilter 🍸 Columns 📰	Sort 🕌 Delete 🎽
\$ Site	🔺 Class ID	Class Description	Extended ID
T	Ŧ	T	Ŧ
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	

🔺 🖍 Sel	ect container/ass	ociations for role	
Container:	Container:	4908 - Rolling Hills Adult School	•
	Class Definition:	101 - AM - ABE	•
	Special Program:	No selection	•

50 57 KLANDE 97	
Functional Role:	O Administrator
	 Teacher
Start Date:	1/22/2013
End Date:	

- 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.
- 9) Special Program will autopopulate if defined for the selected class definition.

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 nonselectable.

Role is Related to Instructional Program:	💿 N/A	O High School Diploma	Adults w/Disabilities	Other Program
	Basic Skills (ABE)	GED GED	Health & Safety	O ROCP
	ESL	Spanish GED	Home Economics	
	ESL/Citizenship	Career/Tech Ed	Parent Education	
	Citizenship	Workforce Readiness	Older Adults	

Records.



TE View Organization Records Reports Tools Help 11) Click Save. New Functional Role × Personnel 123 - Teacher Mary... Save 🔜 Cancel 🧭 Delete 🗶 Du Navigator Д Functional Role Information Edit / View 4908 - Rolling Hills Adult School Container: Class Description: 101 - AM - ABE 123 - Teacher Mary Smith Personnel: TE Organization Records Reports Tools Help View 12) Review saved Functional 123 - Teacher Mary... 🛛 🗙 123 - Teacher Mary... Personnel Role Information. Delete 🗙 Duplicate h New Navigator П a. Click 🜌 or Edit / View Functional Role Information Class Enrollments 4908 - Rolling Hills Adult School Edit Mode 🖌 Container: to edit Class Description: 101 - AM - ABE saved information. 123 - Teacher Mary Smith Personnel: Role Identification Functional Role Teacher End Date: 3/8/2013 1/7/2013 Start Date: Related Class: 101 - AM - ABE **13)** Click **14** to close the Related Instructional Program N/A personnel member's Functional Role Tab and: TE View Organization Records Reports Tools Help 123 - Teacher Mary... a. Continue with Step 14 if at Personnel 123 - Teacher Mary... the personnel record. Delete 🗙 New 🗎 П Navigator Functional Role Information Edit / View - OR -Organization Reports TE Records Help View Tools b. Continue to Step 1 on Adding Employment 123 - Teacher Mary... × Functional Roles Records New 📄 Delete Navigator П i. Click Market to close the **Functional Role Information** Edit / View **Functional Roles Lister** tab. TE View Organization Records Reports Tools Help 123 - Teacher Mary... × Personnel 14) From the personnel record 🖡 New 🗎 Navigator Navigator, click Personnel Personnel Information Edit / View **Employment.** Functional Role Container: 4908 - Rolling Hills Adult School Personnel Employment Personnel: 123 - Teacher Mary Smith Professional Status Personnel Employment Note: From here, skip to Step New 🖹 Filter 🍸 Columns 🥅 6 on Adding Employment

Container

Sort

Em



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**.

TE	View	Organization	Records	Reports	Tools	Неір
0	-	Agencies Sites Classes	þ		-	
		Personnel	Þ	l Registr	ation	
		Users		Employ	ment Re	cords
		Access Groups		Functional Roles		
		Test Admini Forms Special Prog	strations grams	Profess	ional Sta	atus

TE	View	Organiza	tion	Records	Report	ts To	ols	Help
Pers	sonnel I	Employme	ent	×				
New E	State,	/Agency/Sit	te 490	08 - Rolling H	lills Adult	School	•	Subsite
\$	Conta	iner	-	Personne	I ID	\$		Name

🔺 🖉 Sel	ect Personnel			
Personnel:	Container:	490	8 - Rolling Hills Adult School	
	Personnel:	4	4908 - Rolling Hills Adult School	
			1 - North Campus	
			11 - North City ESL	
			2 - South Campus	
			3 - East Campus	
			4 - West Campus	
			5 - Center for Adults with Disabilities	
			6 - Southwest Campus	

- From the Organization menu, select Personnel -> Employment Records
 - a. To display a list of class instances, 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 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 Select from Lister.
 - ii. Click **Personnel** member.
 - iii. Click Pick.

۷	Select Personnel
---	------------------

Personnel:	Container:	4908 - Rolling Hills Adult School	•
	Personnel:	[•
		101 Main Campus - Team One 1110 Elisa Askew 1111 May Fong 1112 Elio Martinez	
		123 Teacher Wary Smith 124 Mr Ruben 19 Rick Wrota 20 Karenina Vinskaya 211 John Bush 212 Joe Lincoln	
		Clear selection Select from Lister	

eTests TOPSpro

Pick 🔍	Cancel Pick 🥥 New	🔋 Filter 🍸 Colum	ns 🔟 Sort 💱 Delete
٠	Container	A Personnel ID	◆ Name
3	cal million interformer at	T	T
4908 - Ro	olling Hills Adult School	101	Main Campus - Team One
4908 - Ro	olling Hills Adult School	1110	Elisa Askew
4908 - Ro	olling Hills Adult School	1111	May Fong
4908 - Ro	olling Hills Adult School	1112	Elio Martinez
4908 - Ro	olling Hills Adult School	123	Teacher Mary Smith
4908 - Ro	olling Hills Adult School	124	Mr Ruben

5) Skip to Step 7

- *Note:* Begin here if continuing from instructions on Adding Functional Roles.
- 6) Click **New** to add a functional role for the personnel member.
- 7) Select the **Container** wherein the personnel member has employment.







Employme	ent Identification	8) Enter Employment
Record Date:	7/1/2012	identification.
	< July 2012 V	a. Select Record Date .
	Sun Mon Tue Wed Thu Fri Sat	
	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	b Select Employment Type
	29 30 31 1 2 3 4	b. Select Employment Type.
	(
Employment Type:	● N/A	Local Paraprofessional
	State-level Administrative/Superv	visory/Ancillary Services
	O Local Teacher	noory/Andilary Services
	O Local Counselor	
Job Type:	● N/A	c Select Job Type
	O Full-time	e. Sciect job Type.
	O Part-time	
	O Unpaid volunteer	
TE View Organizat	tion Records Reports Tools Help	0) Click Save
Personnel 123 -	Teacher Mary New Personnel Empl	S) Click Save.
Navigator	1 New B Save 🗐 Cancel Ø Delet	e 🗶 Dupli
Edit / View	Personnel Employment Info	ormation
TE View Organiza	tion Records Reports Tools Help	
Personnel 123 -	Teacher Mary	e X Dupli 10) Roviou caved Personnel
Edit / View	Personnel Employment Info	Finition Employment Information.
	Container: 4908 - Rolling Hills Adult Scho	a Click or
	Personnel: <u>123 - Teacher Mary Smith</u>	Edit Mode 🖍 to adit
	Employment Identification	saved information.
	Record Date: 7/1/2012	
	Job Type Full-time	

- 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.

- TE
 View
 Organization
 Records
 Reports
 Tools
 Help

 Personnel
 123 Teacher Mary...
 123 Teacher Mary...
 123 Teacher Mary...
 X

 Navigator
 Image: Cancel Organization
 Delete X
 Dupline

 Edit / View
 Personnel Employment Information
- TE
 View
 Organization
 Records
 Reports
 Tools
 Help

 Personnel Employment
 123 Teacher Mary...
 X

 Navigator
 Image: Cancel I

- 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**.

TE	View	Organization	Records	Reports	Tools	Help
3		Agencies Sites Classes	,			-
		Personnel	•	Registr	ation	
		Users Access Grou	ips	Employ Functio	ment Re nal Role	cords s
		Test Admini Forms Special Proc	strations prams	Profess	ional Sta	itus

TE	View	Organizati	on Records	Reports	Tools	Help
Prof	essional	Status				
New	State/A	gency/Site	4908 - Rolling H	Hills Adult Scl	hool 💌	Subsite
Pro	gram Yea	ır 🗢	Name		A P	ersonnel

Select Personnel					
Personnel:	Site:	4908 - Rolling Hills Adult School			
	Personnel:	4908 - Rolling Hills Adult School			
		1 - North Campus			
		11 - North City ESL			
		2 - South Campus			
		3 - East Campus			
		4 - West Campus			
		5 - Center for Adults with Disabilities			
		6 - Southwest Campus			

- From the Organization menu, select Personnel -> Professional Status.
 - To display a list of professional status records, 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.
- 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 Select from Lister.
 - ii. Click **Personnel.**iii. Click **Pick.**
- 5) Skip to Step 7
- Note: Begin here if continuing from instructions on Adding Employment Records.
- 6) Click New to add professional status for the personnel member.
- Select a Program Year to record the personnel member's professional status.

🔺 🖍 Sel	ect Personnel			
Personnel:	Site:	4908 - Rolling Hills Adult School		
	Personnel:		•	
		1110 Elisa Askew 1111 May Fong 1112 Elio Martinez 123 Teacher Mary Smith 124 Mr Ruben 19 Rick Wrota 20 Karenina Vinskaya 211 John Bush		
		Clear selection Select from Lister		

Pick Cancel Pick 🥥 New 🖹 State/Agency/Site 4908 - Rolling Hills Ad					
Container	 Personnel ID T 	¢ 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			



🗈 💉 Select Program Year				
Program year:	n year: 7/1/2012 - 6/30/2013			
	7/1/2010 - 6/30/2011			
	7/1/2011 - 6/30/2012			
	7/1/2012 - 6/30/2013			





TE

View

Personnel

Navigator

Edit / View

Organization Records

123 - Teacher Mary...

1 New

🔺 🖍 Identificatio	on
Years of Experience:	
Teacher Certificates:	• N/A
	Adult Education Certificate
	K-12 Certification
	Special Education Certification
	TESOL Certification

Reports Tools Help

New Professional S...

Save 🗮 Cancel 🖉 Delete

Professional Status Information

×

8)	Enter profes	siona	ıl st	atus
	Identificatio	on.		

- a. Enter number for **Years of Experience**.
- b. Select **Teacher Certificates**.
- 9) Click Save.

TE View Organization R	ecords Reports Tools Help				
Personnel 123 - Teacher	Personnel 123 - Teacher Mary 123 - Teacher Mary 🛛				
Navigator 🏨	New 🖹 Save 🗐 Cancel Ø Delete 🗙 Duplicate 隯 🗐 🕄 1 / 1 🕞				
Edit / View	Professional Status Information				
	Personnel: 123 - Teacher Mary Smith				
	Program Year: 7/1/2012 - 6/30/2013				
	Identification				
	Years of Experience: 25				
	Teacher Certificates: Adult Education Certificate, K-12 Certification, TESOL Certification				

TE View O	rganization Records	Reports	Tools He	elp
Personnel	123 - Teacher Mary	. 12:	3 - Teacher	Mary 🚺
Navigator	I New	Save	Cancel (🖉 Delete 🔀
Edit / View		Profession	nal Status	Information

📧 View Organizati	on Records Reports Tools Help	
Professional Status	123 - Teacher Mary 🛛	
Navigator	🖡 New 🖹 Save 🛒 Cancel 🥝 Delete >	
Edit / View	Professional Status Information	on

10) Review saved **Professional Status Information**.

a.	Click 🜌 or	
	Edit Mode 📌	to edit
	saved information	on.

11) Click to close the personnel member'sProfessional 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 **New** to add more personnel records
 - a. Continue to **Step 3** on **Adding Personnel Registration**.

– OR –

- b. Click to close the **Personnel Lister** tab.
- Note: This concludes the setup of a Personnel Record.



