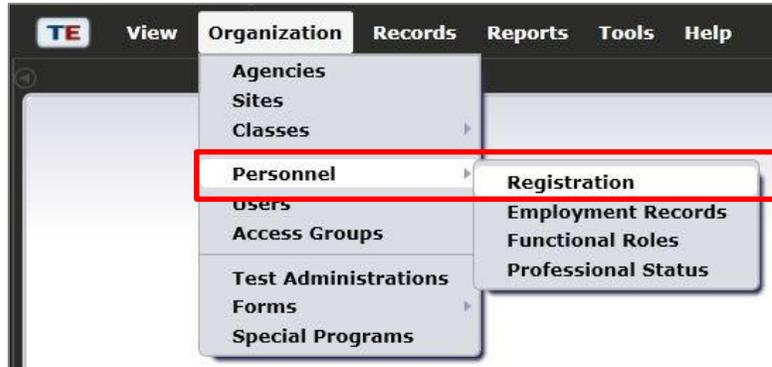


Adding Personnel Registrations

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.

- 1) From the **Organization** menu, select **Personnel** -> **Registration**.

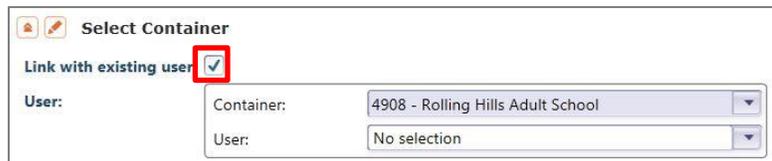


- a. To display a list of personnel records, click **Refresh** if auto-refresh is not enabled
- b. To enable auto-refresh, click the **TE icon**, select **Options** -> **Listers**, and check "All Listers Auto-Refresh", then click OK.

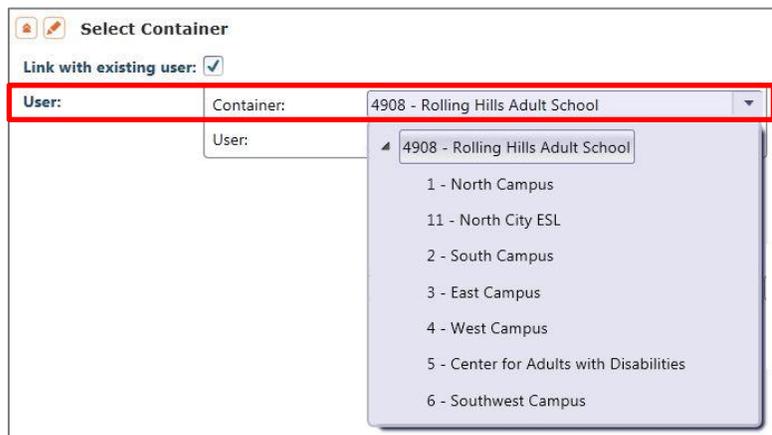
- 2) Click **New** to add a personnel registration record.



- 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**.

4) Select the **User** from the drop-down list of accounts.

- a. To search for a user,
 - i. Click **Select from Lister**
 - ii. Click **User**
 - iii. Click **Pick**.

Container	User Account	First & Last Name
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

b. Skip to **Step 6**.

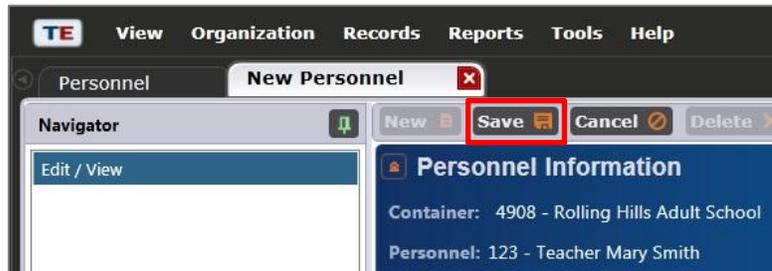
5) Select the **Container** wherein the personnel member has an association.

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.

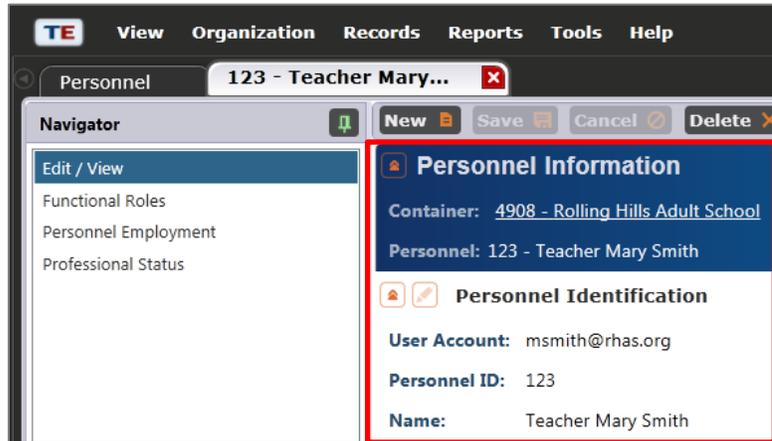
- b. If *not* linked with an existing user account,
 - i. Enter **Personnel Identification**.

7) Click Save.



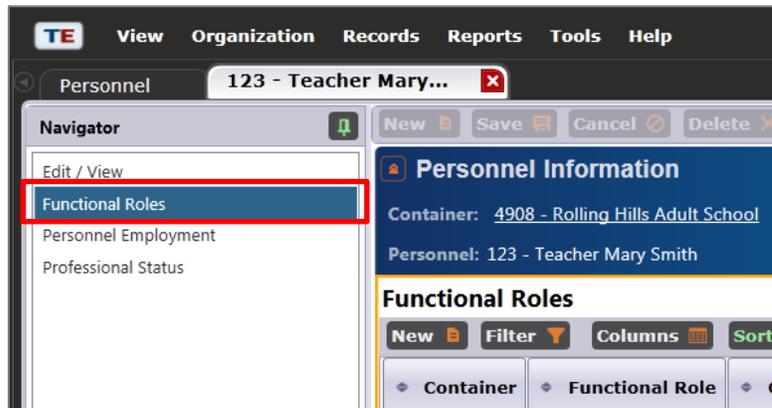
8) Review saved Personnel Registration.

- a. Click or **Edit Mode** to edit saved information.



9) From the personnel record Navigator, click Functional Roles.

❖ **Note:** To continue, skip to Step 6 on Adding Functional Roles.



Adding Functional Roles

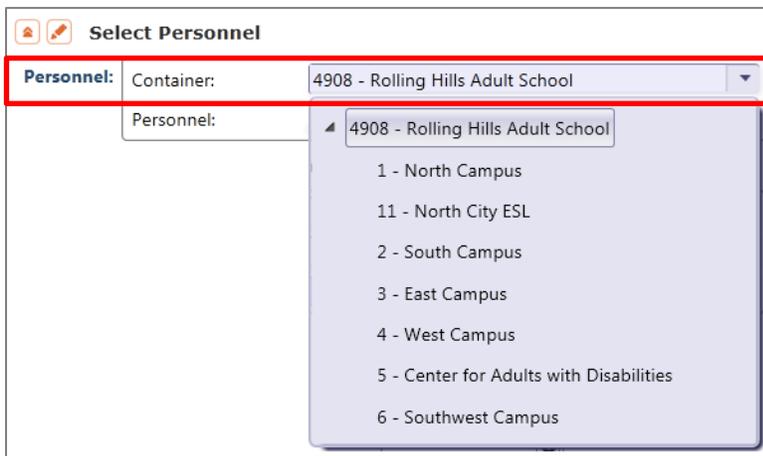
This document is a continuation of a step-by-step tutorial on how to add **Functional Roles** to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to **Step 6**.



- 1) 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**.

Container	Personnel ID	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

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.

Select container/associations for role

Container: 1 - North Campus

Class Definition: [Empty]

Special Program:

- 1 ABE
- 1001 ABE Intermediate
- 1002 ABE - CEC
- 101 AM ABE
- 1106 ESL - Beginning
- 1115 ESL - Intermediate
- 1116 ESL - Intermediate - High
- 12345 ESL - proxy
- 210 Concurrent - afternoon
- 3 GED

Clear selection | Select from Lister...

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**.

Pick | Cancel Pick | New | Filter | Columns | Sort | Delete

Site	Class ID	Class Description	Extended ID
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	

Select container/associations for role

Container: 4908 - Rolling Hills Adult School

Class Definition: 101 - AM - ABE

Special Program: No selection

9) **Special Program** will auto-populate if defined for the selected class definition.

Role Identification

Functional Role:

Administrator

Teacher

Start Date: 1/22/2013

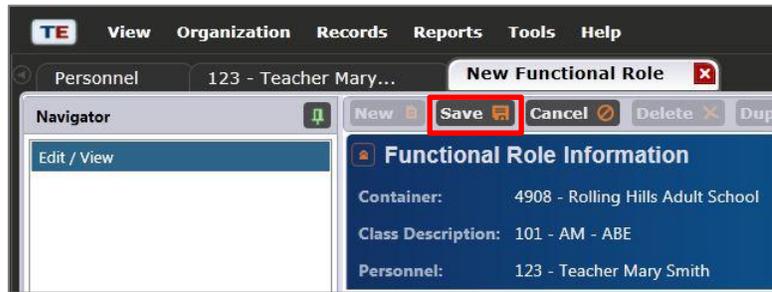
End Date: [Empty]

- 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 non-selectable.

Role is Related to Instructional Program:

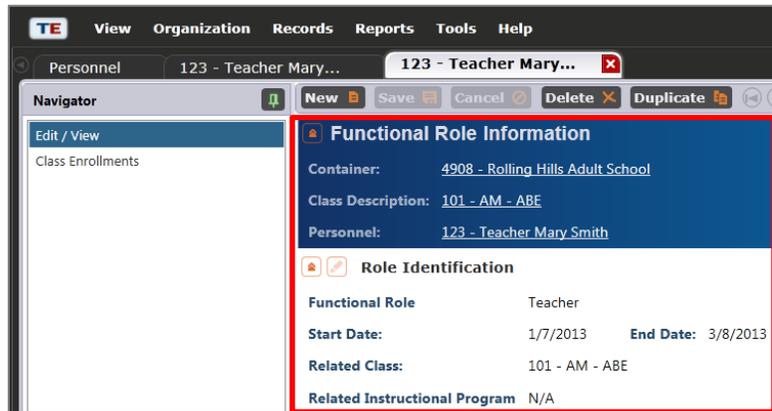
N/A
 High School Diploma
 Adults w/Disabilities
 Other Program
 Basic Skills (ABE)
 GED
 Health & Safety
 ROCP
 ESL
 Spanish GED
 Home Economics
 ESL/Citizenship
 Career/Tech Ed
 Parent Education
 Citizenship
 Workforce Readiness
 Older Adults

11) Click **Save**.



12) Review saved **Functional Role Information**.

- a. Click or **Edit Mode** to edit saved information.



13) Click to close the personnel member's **Functional Role Tab** and:

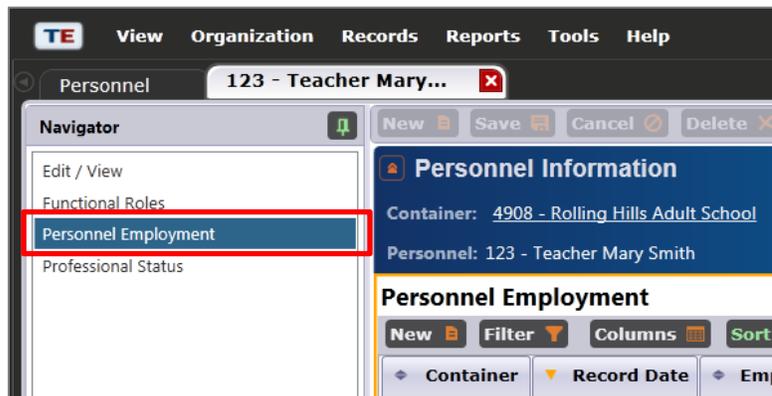
- a. Continue with **Step 14** if at the personnel record.

– OR –

- b. Continue to **Step 1** on **Adding Employment Records**
 - i. Click to close the **Functional Roles Lister** tab.



14) From the personnel record **Navigator**, click **Personnel Employment**.



❖ **Note:** From here, skip to **Step 6** on **Adding Employment Records**.

Adding Employment Records

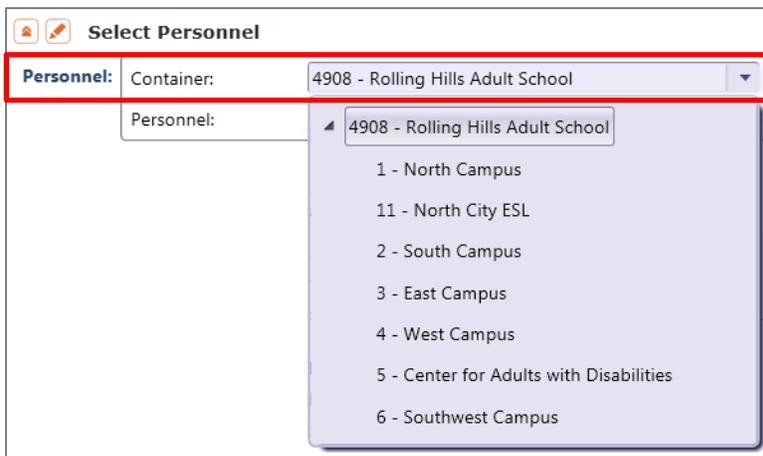
*This document is a continuation of a step-by-step tutorial on how to add an **Employment Record** to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to **Step 6**.*



- 1) 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**.



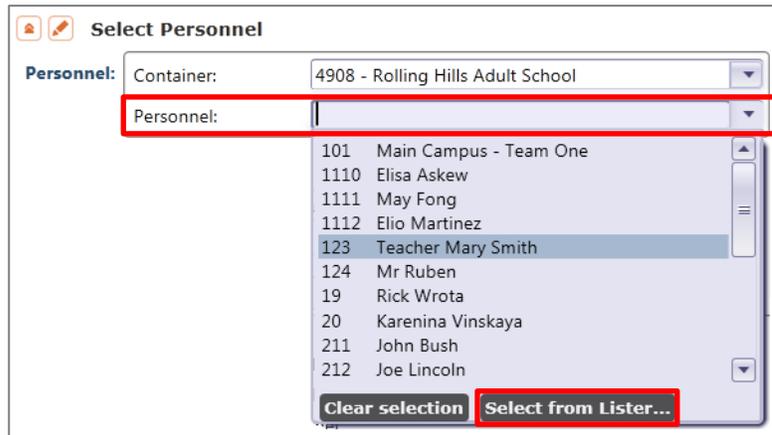
- 2) Click **New** to add an employment record for a personnel member.



- 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**.

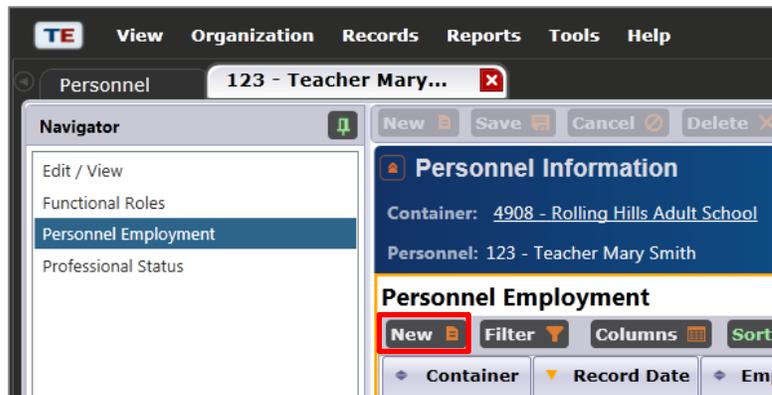


5) Skip to Step 7



❖ **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.



Employment Identification

Record Date: 7/1/2012

July 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
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
29	30	31	1	2	3	4

8) Enter **Employment Identification**.

a. Select **Record Date**.

b. Select **Employment Type**.

Employment Type:

N/A Local Paraprofessional

State-level Administrative/Supervisory/Ancillary Services

Local-level Administrative/Supervisory/Ancillary Services

Local Teacher

Local Counselor

Job Type:

N/A

Full-time

Part-time

Unpaid volunteer

c. Select **Job Type**.



9) Click **Save**.



10) Review saved **Personnel Employment Information**.

a. Click or **Edit Mode** to edit saved information.

11) Click  to close the personnel member's **Employment Record Tab** and:



a. Continue with **Step 12** if at the personnel record.

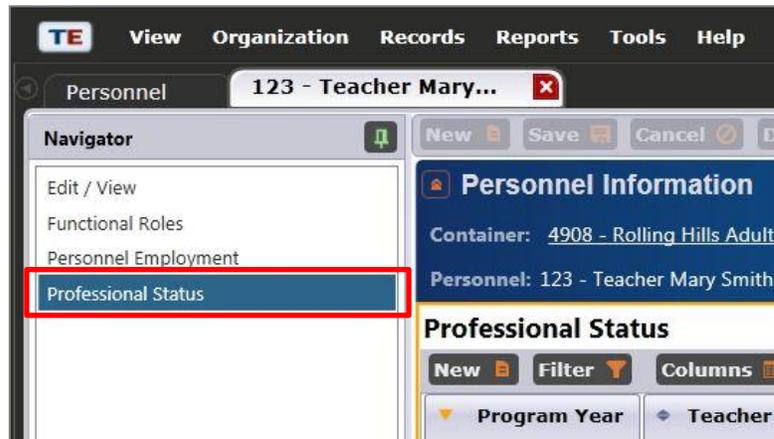
– OR –

b. Continue to **Step 1** on **Adding Professional Status**.
i. Click  to close the **Personnel Employment Lister** tab.



12) From the personnel record **Navigator**, click **Professional Status**.

❖ **Note:** From here, skip to **Step 6** on **Adding Professional Status**.



Adding Professional Status

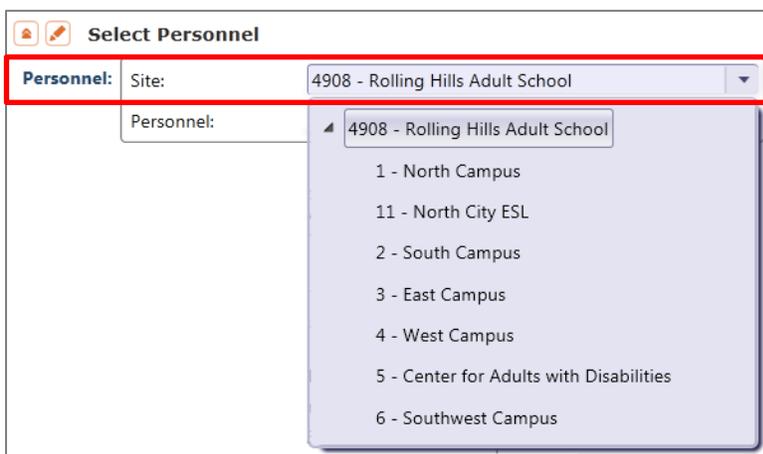
This document is a continuation of a step-by-step tutorial on how to add Professional Status to a personnel record in TOPSpro Enterprise. If continuing from previous steps, please skip to Step 6.



- 1) From the **Organization** menu, select **Personnel** -> **Professional Status**.
 - a. 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**.

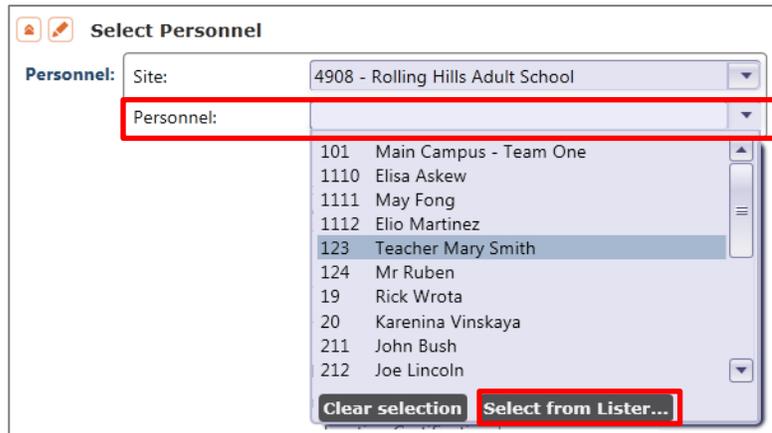


- 2) Click **New** to add a professional status record for the personnel member.

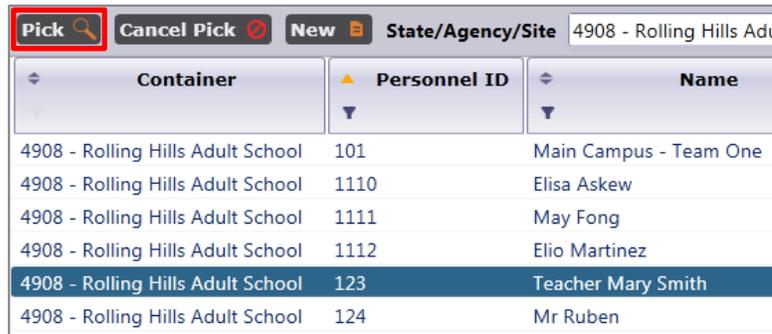


- 3) Select the personnel **Site** to locate the personnel member.

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**.

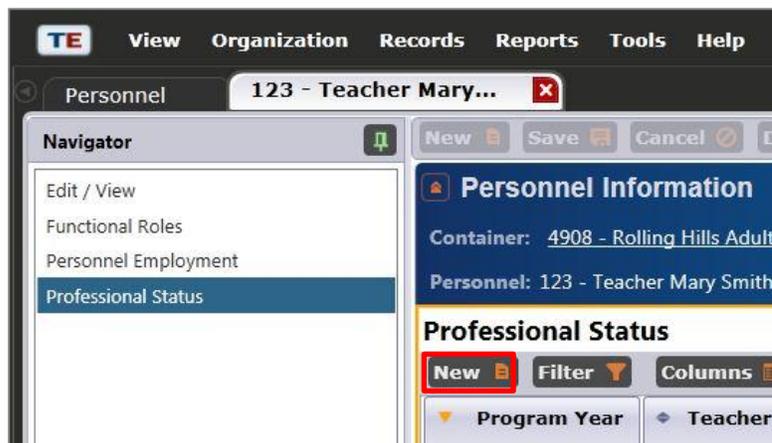


5) Skip to Step 7



❖ **Note:** Begin here if continuing from instructions on **Adding Employment Records**.

6) Click **New** to add professional status for the personnel member.



7) Select a **Program Year** to record the personnel member's professional status.



- 8) Enter professional status **Identification**.
 - a. Enter number for **Years of Experience**.
 - b. Select **Teacher Certificates**.



- 9) Click **Save**.



- 10) Review saved **Professional Status Information**.
 - a. Click  or **Edit Mode**  to edit saved information.



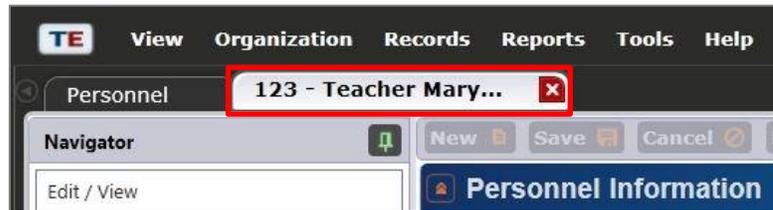
- 11) Click  to close the personnel member's **Professional Status Tab** and:
 - a. Continue with **Step 12** if at the personnel record.

– 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.