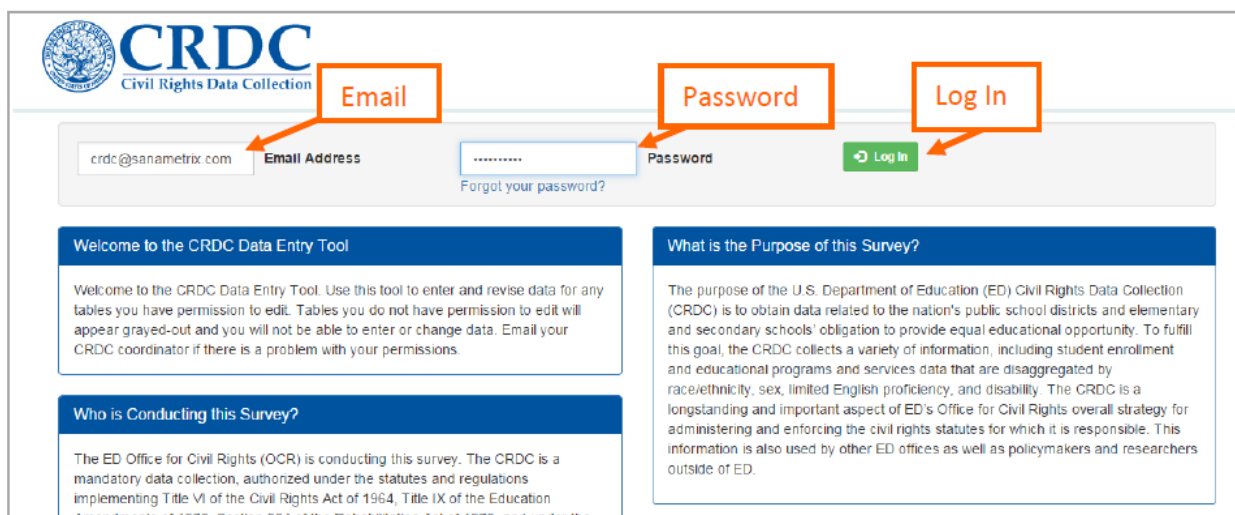


Add New Users and Set Permissions

A feature of the CRDC data submission tool is the ability to add new users to the online tool and grant specific personnel permissions to view or edit data. Steps 1-4 describe how to add new users and steps 5 and onward describe how to manage permissions.

Step 1: Log into the CRDC System

Access the CRDC survey at <http://surveys.nces.ed.gov/crdc>. Enter your email and password and click the green “Log In” button as shown in Figure 1.



The screenshot shows the CRDC login interface. At the top left is the CRDC logo. Below it, there are three input fields: 'Email Address' with the example 'crdc@sanamatrix.com', a password field with masked characters, and a 'Log In' button. Orange boxes with arrows point to each of these three elements, labeled 'Email', 'Password', and 'Log In'. Below the login fields are three informational boxes: 'Welcome to the CRDC Data Entry Tool', 'Who is Conducting this Survey?', and 'What is the Purpose of this Survey?'.

Figure 1 Log-In Screen



Don't have a password? See the information at crdc@aemcorp.com.

Step 2: Access the ADMIN page

Next to the silhouette icon with your username is the link to the ADMIN section of the site, shown in Figure 2.



Figure 2 CRDC Menu

Step 3: Select Add New Users

On the ADMIN home page, click on Add New Users, as shown in Figure 3.

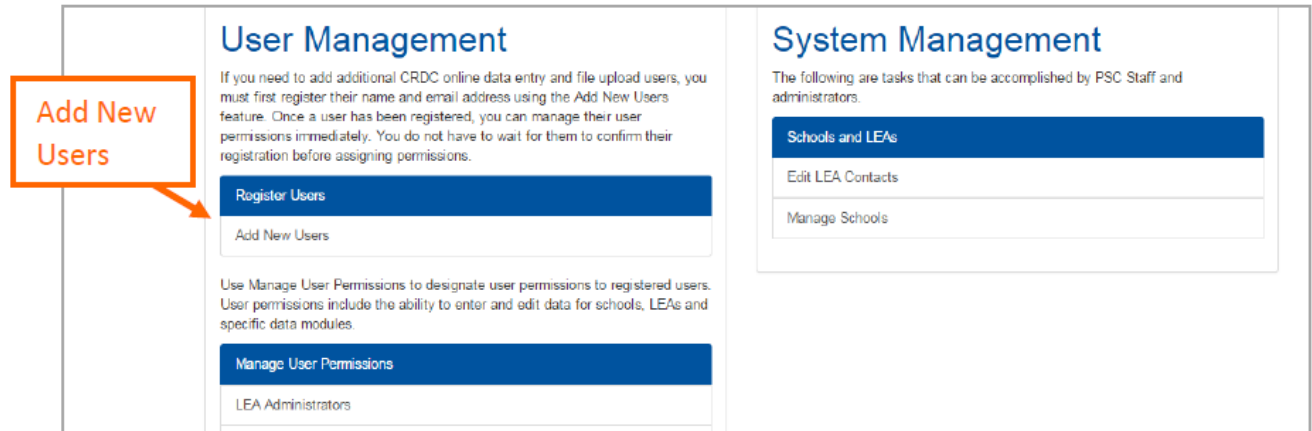


Figure 3 Admin Homepage

Step 4: Enter User Name and Email Information

After clicking “Add New User”, a box will appear asking to enter the first and last name of the user and his/her email address. Next, click “Confirm Registration”, as shown in Figure 4. The text in red explains the email verification process and the importance of informing new users that they will be receiving confirmation emails. After clicking “Confirm Registration”, a new box will open stating that a new user was created, as shown in Figure 5.

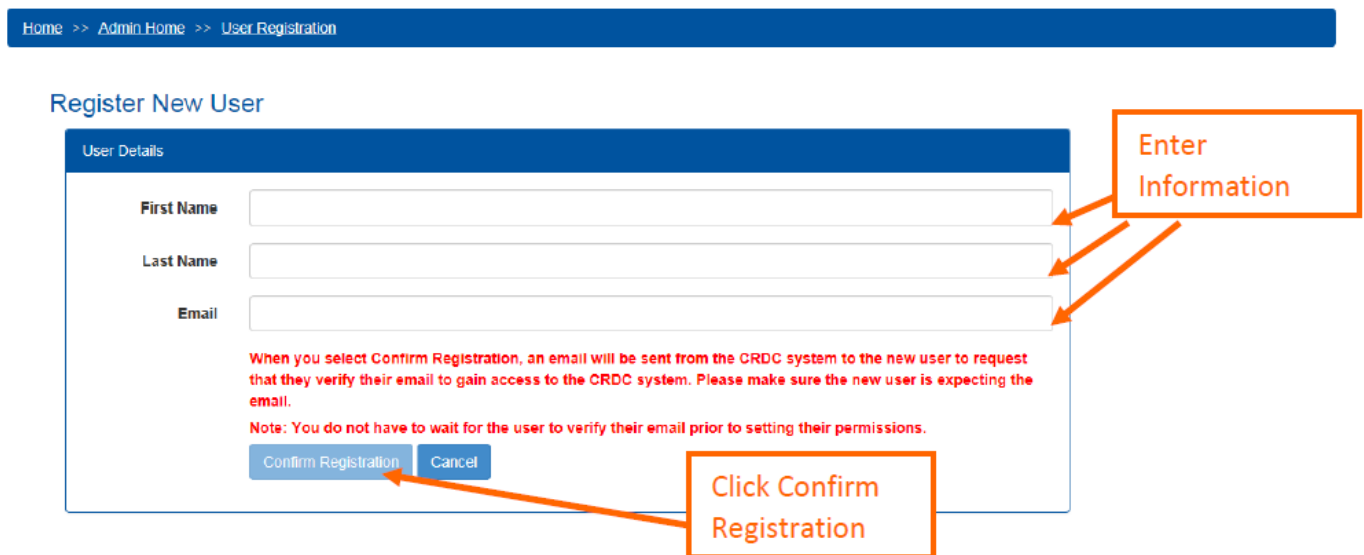


Figure 4 Register New User

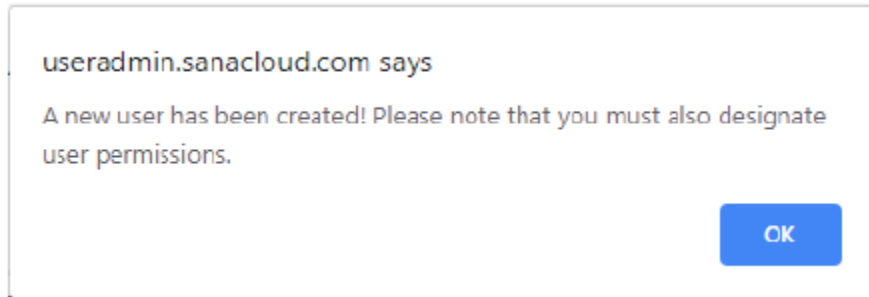


Figure 5 Confirmation that a new user was created

Important Tip:

The user will not be able to access the system before following the email link to verify his/her address and completing the registration process by setting a password. However, the administrator does not need to wait for the new user to verify his/her email before setting the new user's permissions.

Step 5: Select User Role

Under the Manage User Permissions section of Admin Page, you will see selections for the user roles in the CRDC system, including:

- **LEA Administrators:** LEA Administrators can add new users, enter and review data for schools and the district, and access reports. *Every LEA Admin always has full Read, Write, and Admin permissions for his/her LEA and all schools within it.*
- **LEA Staff:** LEA Staff can have specific permissions for certain schools and/or content-specific modules of CRDC questions. LEA Staff cannot add new users to the system.
- **School Staff:** School Staff can enter and review data for a specific school only.

Select the role assignment for the new user by clicking one of the options under the blue "Manage User Permissions" header. See Figure 6.

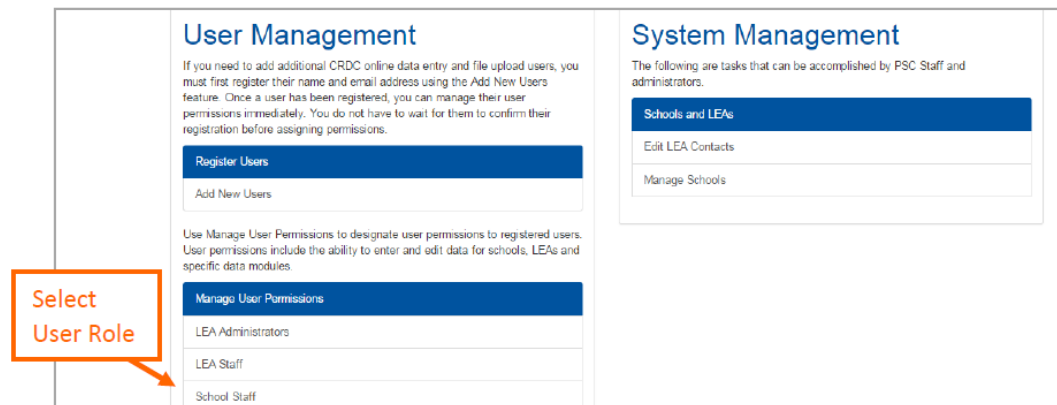


Figure 6 ADMIN Home Page – User Management

Step 6: Add User to the Selected Role

After selecting the user role, click the green “+ Add User” button to add a new user to your districts survey. Figure 7 shows where the button appears on the LEA Staff permissions page and the green button appears in a similar location for each of the user role pages.

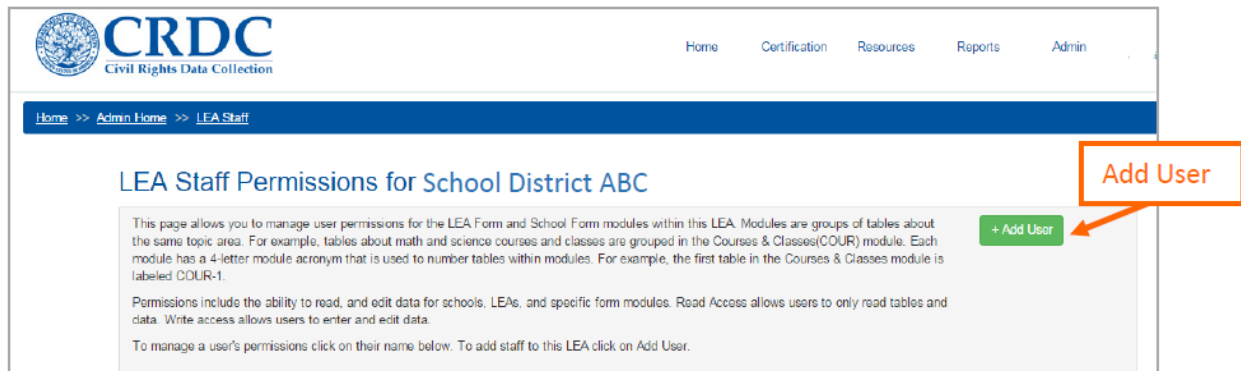


Figure 7 Add User to LEA Staff

Step 7: Enter the New User’s Email Address

After clicking the “+ Add User” button in Step 6, a pop-up box will appear to identify which new user to add to the selected role. The system starts searching for an existing user’s email address as you begin typing, as shown in Figure 8.

Figure 8 Add Users by Typing Email Address

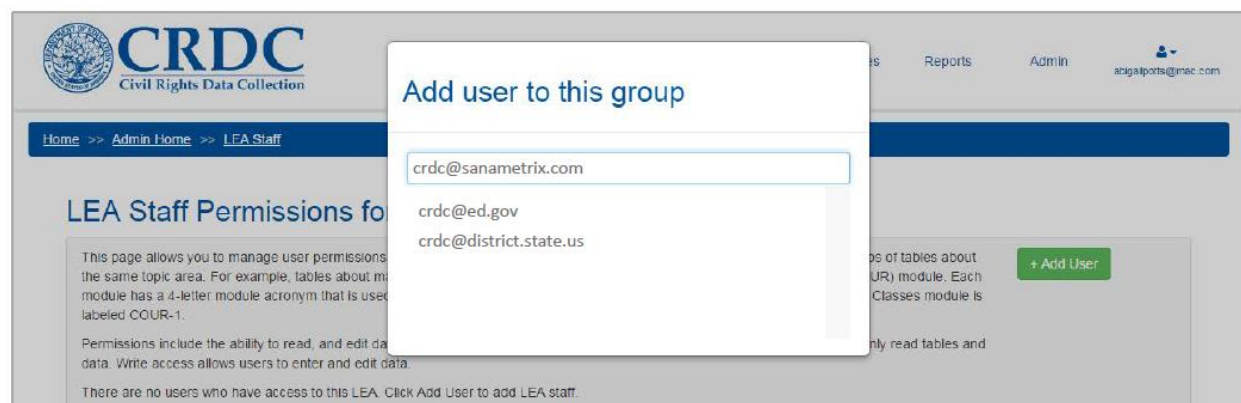


Figure 8: Add Users by Typing Email Address

Step 8: Click Add User

After selecting an email address, click “Add User” to add the specific user role.

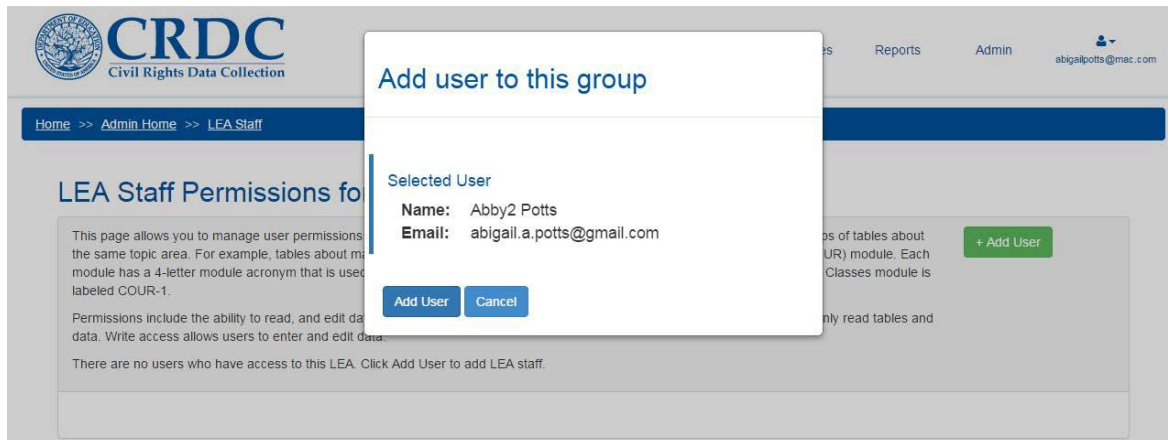


Figure 9 Add Users by Typing Email Address

Important Tip:

The next series of steps varies depending on the user role. We will start with an example of adding a new user to the role of “LEA Staff.” Steps 9-10 below give instructions on how to set permissions specifically for that role. LEA staff permissions are the most complex because of the multitude of options.

Scroll down to page 7 for examples on the easy process to set permissions for “LEA Admin” or “School Staff”.

Step 9 (LEA Staff): Set Permissions for Your New User

After adding a new user to the LEA Staff role, the new user will now show up in the list of those with LEA Staff Permissions. From this page you can manage permissions for the modules within both the District and School forms or wholly remove or disable access for that user. Set permissions for the user by clicking the plus (+) sign next to the username and email address.

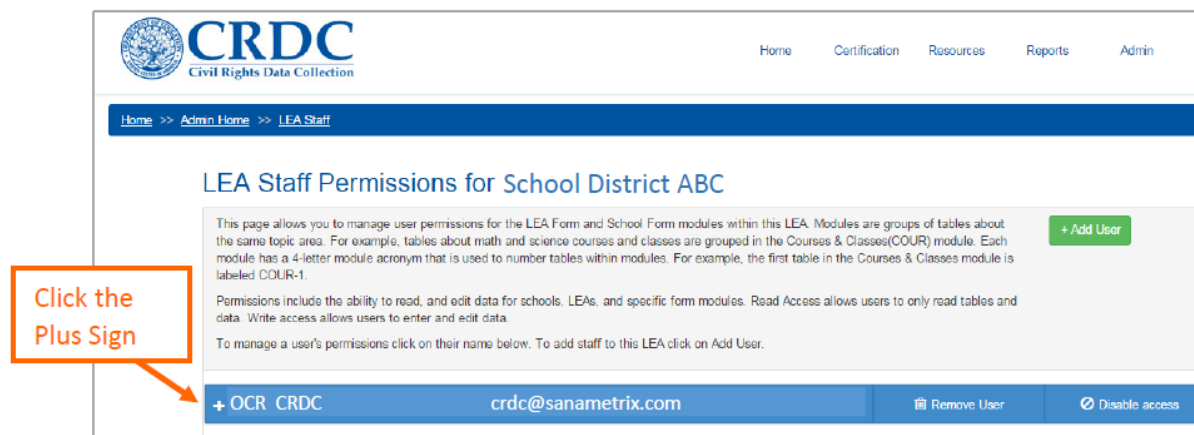
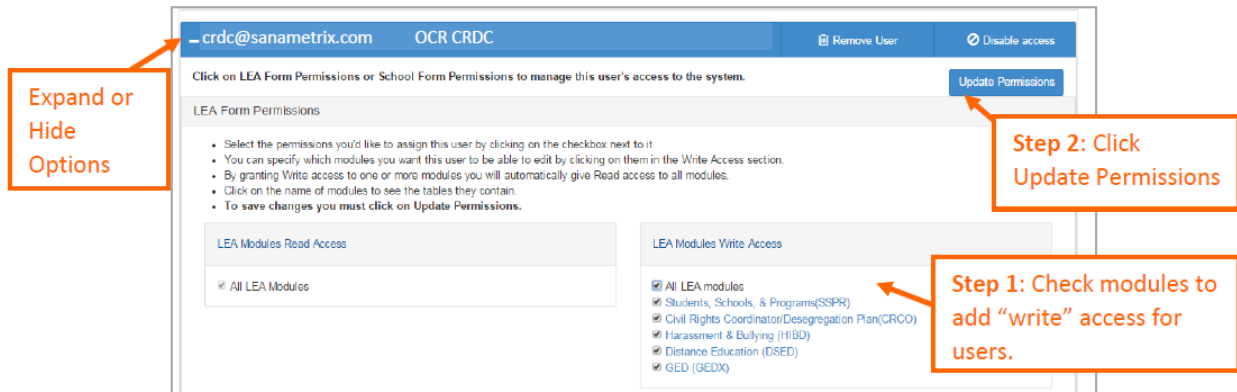


Figure 10 Access Options for Setting Permissions

Step 10 (LEA Staff): Add Access to the LEA or School Form by Module

Expanding the options allows you to grant permissions by district (LEA) or school and by topic-area module. Within the LEA form, the administrator may give this user read access (the ability to view data already submitted) to all LEA modules and write access (the ability to enter new data to questions and tables) to either all, or only selected, LEA modules. Figure 11 shows how to add access on the LEA form by checking all or some topic-area modules to grant “write” access.



Expand or Hide Options

Step 2: Click Update Permissions

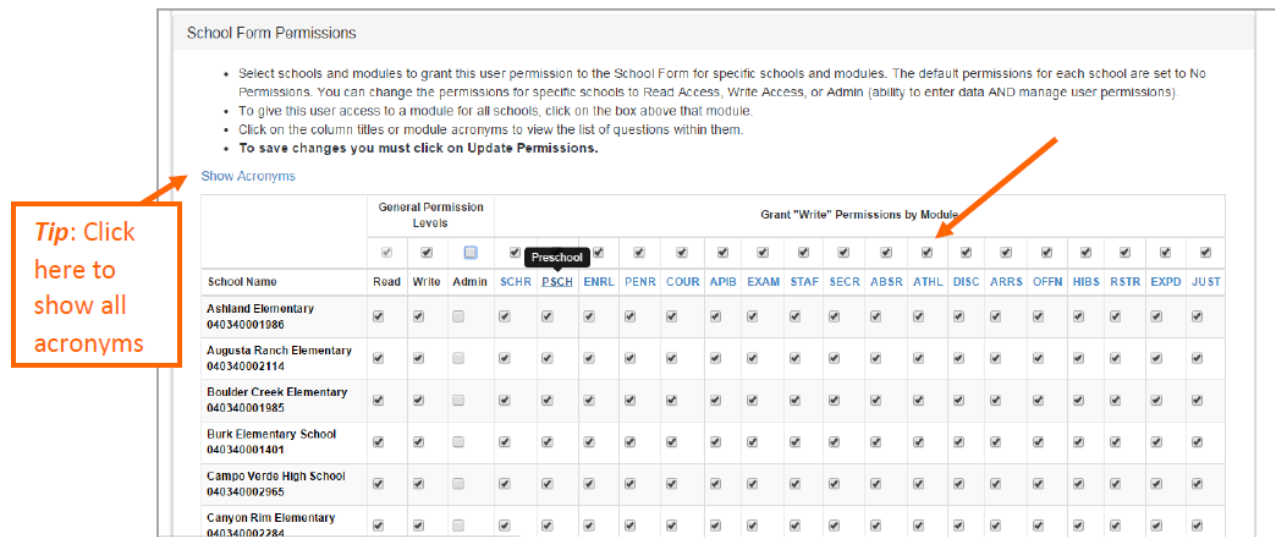
Step 1: Check modules to add “write” access for users.

Figure 11 Setting LEA Form Permissions

You can also set individual permissions for schools in your district. Figure 12 show options for adding permissions by topic-area module. When the administrator selects School Form Permissions, the process is somewhat more complicated, not only because there are a greater number of modules in the School Form, but because there are multiple schools within most LEAs.

Check header rows to add permissions by module across all schools.

Example: Check ATHL (or Athletics) to add access to athletics questions for all schools.



Tip: Click here to show all acronyms

School Name	General Permission Levels			Grant "Write" Permissions by Module																			
	Read	Write	Admin	Preschool	SCHR	ESCH	ENRL	PENR	COUR	APIS	EXAM	STAF	SECR	ABSR	ATHL	DISC	ARRS	OFFN	HIBS	RSTR	EXPD	JUST	
Ashtand Elementary 040340001986	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Augusta Ranch Elementary 040340002114	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Boulder Creek Elementary 040340001985	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Burk Elementary School 040340001401	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campo Verde High School 040340002965	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Canyon Rim Elementary 040340002284	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 12 Setting School Form Permissions by Adding Access to Modules

Figure 13 shows how checking “write” next to Augusta Ranch Elementary will add access across all school-level data for that school.

School Form Permissions

- Select schools and modules to grant this user permission to the School Form for specific schools and modules. The default permissions for each school are set to No Permissions. You can change the permissions for specific schools to Read Access, Write Access, or Admin (ability to enter data AND manage user permissions).
- To give this user access to a module for all schools, click on the box above that module.
- Click on the column titles or module acronyms to view the list of schools.
- To save changes you must click on Update Permission.

[Show Acronyms](#)

School Name	General Permission Levels			Grant "Write" Permissions by Module																		
	Read	Write	Admin	SCHR	PSCH	ENRL	PENR	COUR	APIB	EXAM	STAF	SECR	ABSR	ATHL	DISC	ARRS	OFFN	HIBS	RSTR	EXPD	JUST	
Ashland Elementary 040340001986	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Augusta Ranch Elementary 040340002114	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 13 Setting School Form Permissions by Adding Access to Schools.

You can also customize access by checking or unchecking any box on the grid. Figure 14 shows that access to upload preschool data was removed from Augusta Ranch Elementary and access to upload staff data was removed from Burk Elementary.

School Form Permissions

- Select schools and modules to grant this user permission to the School Form for specific schools and modules. The default permissions for each school are set to No Permissions. You can change the permissions for specific schools to Read Access, Write Access, or Admin (ability to enter data AND manage user permissions).
- To give this user access to a module for all schools, click on the box above that module.
- Click on the column titles or module acronyms to view the list of schools.
- To save changes you must click on Update Permission.

[Show Acronyms](#)

School Name	General Permission Levels			Grant "Write" Permissions by Module																		
	Read	Write	Admin	SCHR	PSCH	ENRL	PENR	COUR	APIB	EXAM	STAF	SECR	ABSR	ATHL	DISC	ARRS	OFFN	HIBS	RSTR	EXPD	JUST	
Ashland Elementary 040340001986	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Augusta Ranch Elementary 040340002114	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Boulder Creek Elementary 040340001985	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Burk Elementary School 040340001401	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campo Verde High School 040340002965	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Canyon Rim Elementary 040340002284	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 14 Setting Customized Access across Schools and Modules



Have more questions about setting custom access? See the CRDC user guide at crdc@aemcorp.com.

Last Step: Click Update Permissions

The last step in setting customized access is to update the permissions by clicking the “update permissions” button shown in Figure 15.

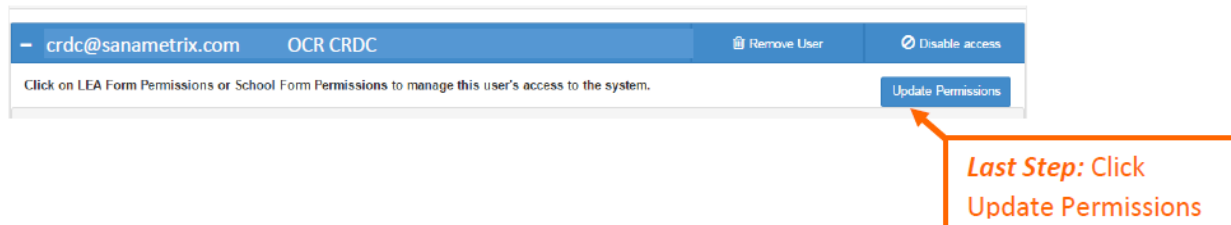


Figure 15 Click Update Permissions

Important Tip:

The following outlines the easy process for setting permissions for “LEA Admin” or “School Staff” after step 8 on page 4 has occurred.

Step 9 (LEA ADMIN): Enable LEA Admin Permissions

The only options are to add or remove users from the list of LEA Admins for a particular LEA. There is no need to define specific permissions, as *every LEA Admin always has full Read, Write, and Admin permissions for his/her LEA and all schools within it.* Figure 16 shows how your new LEA Admin will appear once the user is added to the group.

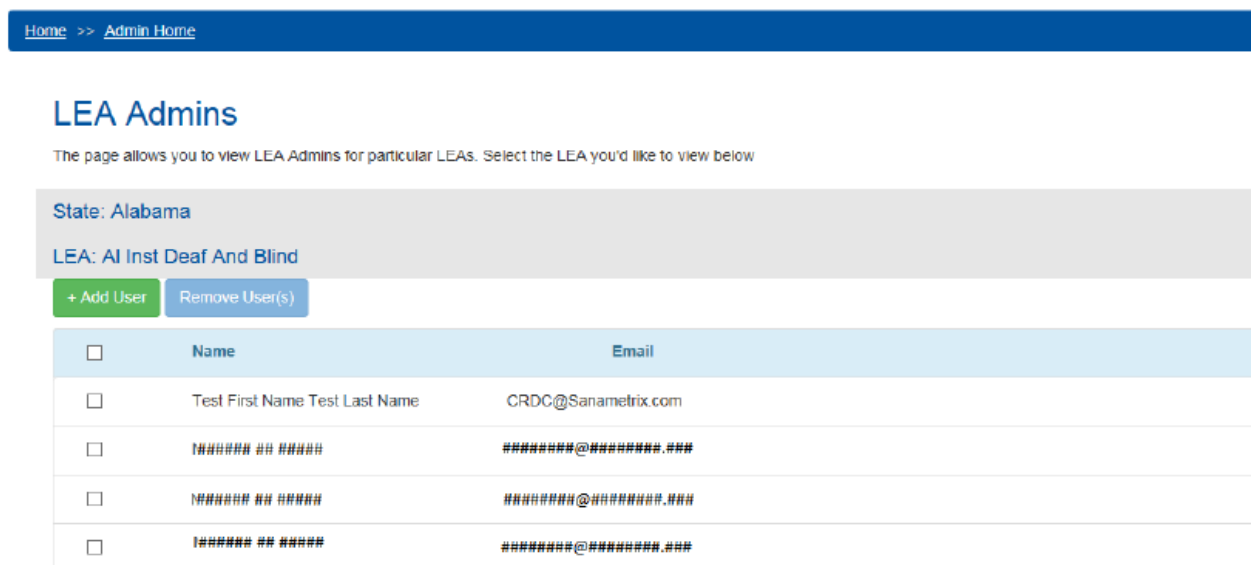
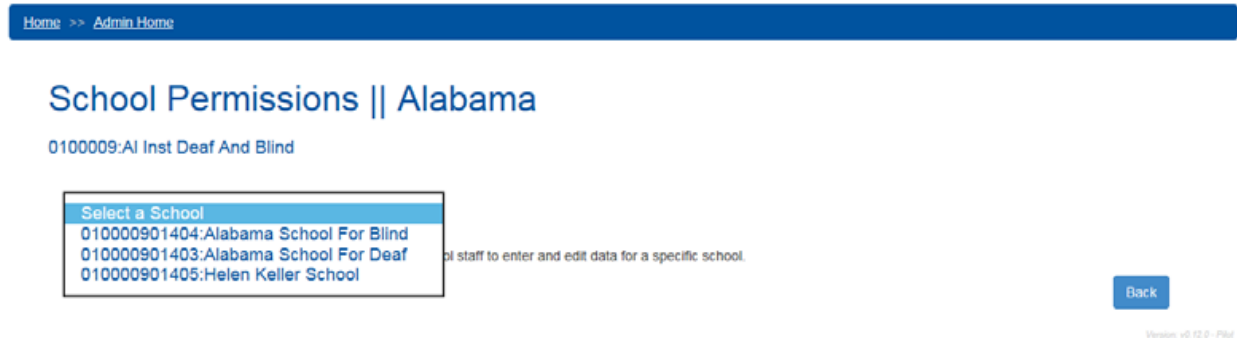


Figure 16 Click the Checkbox Next to the Username

Step 10 (School Staff): Add Access for School Staff

Managing user permissions for School Staff is simpler than for LEA Staff. For School Staff, permissions need only be defined for one school.

First, select the school to grant read/write access for your new user, as shown in Figure 17.



Home >> Admin Home

School Permissions || Alabama

0100009:Al Inst Deaf And Blind

Select a School
 010000901404:Alabama School For Blind
 010000901403:Alabama School For Deaf
 010000901405:Helen Keller School

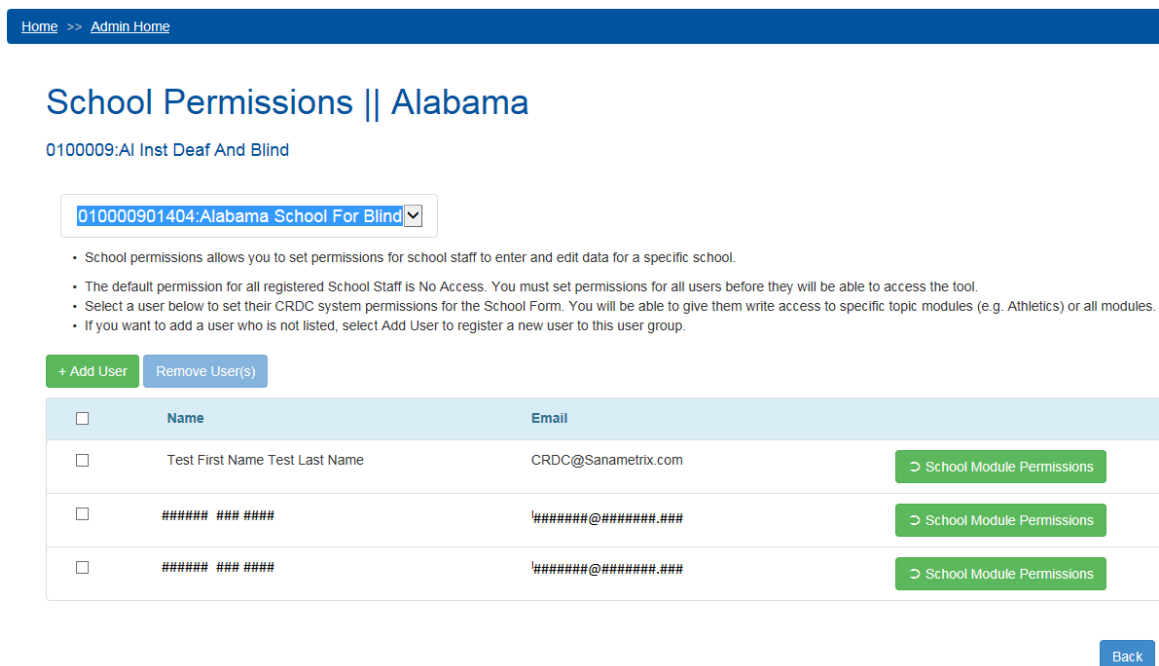
pl staff to enter and edit data for a specific school.

Back

Version: v0.12.0 - Final

Figure 17 Select a School

Once a school is selected, you modify permissions within that school form by clicking the “School Module Permissions” button next to the new user’s account, as shown in Figure 18.



Home >> Admin Home

School Permissions || Alabama

0100009:Al Inst Deaf And Blind

010000901404:Alabama School For Blind

- School permissions allows you to set permissions for school staff to enter and edit data for a specific school.
- The default permission for all registered School Staff is No Access. You must set permissions for all users before they will be able to access the tool.
- Select a user below to set their CRDC system permissions for the School Form. You will be able to give them write access to specific topic modules (e.g. Athletics) or all modules.
- If you want to add a user who is not listed, select Add User to register a new user to this user group.

+ Add User Remove User(s)

<input type="checkbox"/>	Name	Email	
<input type="checkbox"/>	Test First Name Test Last Name	CRDC@Sanamatrix.com	➤ School Module Permissions
<input type="checkbox"/>	##### ### ####	'#####@#####.###	➤ School Module Permissions
<input type="checkbox"/>	##### ### ####	'#####@#####.###	➤ School Module Permissions

Back

Figure 18 Click “School Module Permissions”

Next, select the modules for which the user should have data entry (Write) permissions, then select Update Permissions to make any changes effective, as shown in Figure 19. Selecting the top check box selects all modules for the School Form.

[Home](#) >> [Admin Home](#)

Managing Module Permissions for Test First Name Test Last Name for Alabama School For Blind

- Click on the school module to select the module(s) in this school that you want this user to have data entry permissions for. To select all modules, check the box that will appear in the top-left corner.
- Click on Update Permissions to save this user's permissions.

Back
Update Permissions

<input type="checkbox"/>	Acronym	Name	Access
<input type="checkbox"/>	SCHR	School Characteristics	No Access
<input type="checkbox"/>	PSCH	Preschool	No Access
<input type="checkbox"/>	ENRL	Enrollment	No Access
<input type="checkbox"/>	FNRL	Program Enrollment (Gifted & talented, Dual Enrollment, Credit Recovery)	No Access
<input type="checkbox"/>	COUR	Courses & Classes	No Access
<input type="checkbox"/>	APIB	Advanced Placement (AP) & International Baccalaureate Diploma Programme (IB) Enrollment	No Access
<input type="checkbox"/>	EXAM	SAT/ACT & Advanced Placement (AP) Exams	No Access
<input type="checkbox"/>	STAF	School & School Support Staff	No Access
<input type="checkbox"/>	SECR	School Security Staff	No Access
<input type="checkbox"/>	ABSR	Chronic Absenteeism & Retention	No Access
<input type="checkbox"/>	ATHL	Single-sex Interscholastic Athletics	No Access
<input type="checkbox"/>	DISC	Student Discipline (Suspension, Expulsion, Corporal Punishment)	No Access
<input type="checkbox"/>	ARRS	Student Discipline (Referrals to Law Enforcement & School-related Arrests)	No Access
<input type="checkbox"/>	OFFN	Offenses	No Access
<input type="checkbox"/>	HBS	Harassment & Bullying	No Access
<input type="checkbox"/>	RSTR	Restraint & Seclusion	No Access
<input type="checkbox"/>	EXPD	School Expenditures (Personnel and Non-Personnel)	No Access
<input type="checkbox"/>	JUST	Justice Facilities	No Access

Back
Update Permissions

Click module checkboxes to add access.

Last Step: Click Update Permissions

Figure 19 Click “Update Permissions”