

COMMUNITY SCHOOL ADMIN USER SCREENS

How Do I Gain CSADM Access?

Each school is required to identify a Financial Contact in the school's entity profile. If a Financial Contact has not been identified or if you wish to change the current contact, please complete a CSADM Profile Modification form. This form is located on the CSADM Corner webpage at:

<http://www.ode.state.oh.us/GD/Templates/Pages/ODE/ODEDetail.aspx?page=3&TopicRelationID=998&ContentID=15442&Content=27285>

The link to the CSADM Corner may also be found on the CSADM home page.

How Do I Log in to the System?

After your account has been created and you receive your login information, go to the CSADM login screen located on the Web at: <https://webapp.nwoca.org/csadm>

CSADM Login Page

CSADM [Test Version]

Warning This is a **TEST** version of the CSADM system. Only authorized users should login to this version.

User Login

Username

Password

[Forgotten your Password?](#)

Welcome to the CSADM web application!

See [Browser Requirements](#) for information about minimum browser requirements.

Need help? The [CSADM Support Forum](#) allows you to request assistance, ask questions, or report bugs with the CSADM system.

Type in the username and password sent to you from the CSADM administrator at NWOCA. **Security NOTE: To maintain the highest security for your school's information, please be sure to change your password regularly. In addition, your password should be confidential and not shared at any time.**

What If I Forgot My Password?

Click on the "Forgotten your password?" link

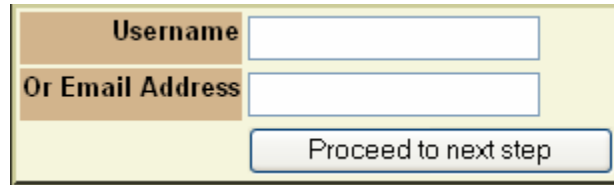
User Login

Username

Password

[Forgotten your Password?](#)

1. The user will be able to enter either their username or the e-mail address used to create the account.



A login form with a light yellow background and a brown header. The header contains the text "Username" and "Or Email Address" in white. Below the header are two white input fields. A blue button with the text "Proceed to next step" is located at the bottom right of the form.

2. Click the button labeled "Proceed to next step".
3. You will then be prompted to answer the secret question that you selected when you first logged into CSADM. Answering this question will complete your authentication process and your username and password will be e-mailed to you.
4. If you are unable to correctly provide either your username or e-mail address then the system will not be able to authenticate you. You will need to e-mail the CSADM administrator at csadm@nwoca.org.

CSADM Home Page

After you have successfully logged in to the system, you will be taken to the home page. The entity and the year that you are currently logged in under, is noted in the upper right hand corner of the screen.

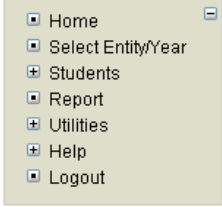
Home Page



A screenshot of the CSADM Home Page. The page has a brown header with "CSADM [Test Version]" on the left and "Smalltown" on the right. A navigation menu on the left includes: Home, Select Entity/Year, Students, Report, Utilities, Help, and Logout. A "Select" box contains "Smalltown Local Schools (47043)" and "Year 2006". Below the "Select" box is a link to the CSADM Support Forum with the text: "Need help? The CSADM Support Forum allows you to request assistance, ask questions, or report bugs with the CSADM system."

Prior to taking any action in the system, **be sure to confirm that you have selected the proper entity**. Many users have authorized access to multiple entities and should pay close attention to the selected entity when entering the system. The name of the entity will appear in the top right hand corner of the page.

Main Menu Options

	<p>Please Note: The small “minus” tab in the upper right hand corner. If you wish to reduce the menu while working in other screens, simply click here. It will be replaced with a small “plus” tab. To bring the menu back in to view, simply click on the plus tab.</p>
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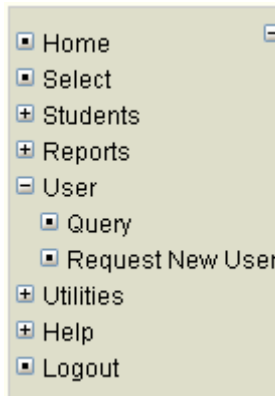
Home	After a successful login, all users will be taken to this screen.
Select Entity/Year	Users need to be sure to select the proper entity and year prior to completing any review or updates.
Students	Community schools will update student records and resident districts will review student records.
Report	Both community schools and resident districts have the ability to generate a variety of reports.
Utilities	The User Profile, Entity Profile and an Upload feature may be accessed here.
Help	This section contains information about the system, a history of changes to the system and access to the status page (see below for more information on the status page).
Logout	Use this to logout of the system.

Creating User Accounts

Before creating a new user account, you must first determine if the user currently has an account within the CSADM system. In order to determine this, you will need to run a query. Be sure to run a query each time you wish to create a new user account.

Running a User Query:

Click on the word User on the main menu and then click on the word Query.



















1. Please select the “Include” by clicking in the radio button. This will ensure that the query includes both enabled and disabled accounts.
2. Place the first 4 to 5 characters of last name of the person you are searching for in the “Last Name” field. (i.e. searching for Timothy Jones)
3. Then click the filter button to run the query.

Username Email Sort

First Name Last Name

Role Disabled: Exclude Include

8 items found, displaying all items.1

	Username	First Name	Last Name	Organization
 	eg-supt	Gary L	Jones	COLUMBUS GROVE LOCAL
 	irishmyluv	Patty D	Jones	REYNOLDSBURG CITY S...
 	jones.j	Lisa Payne	Jones	SHAKER HEIGHTS CITY
 	rdjones	Richard D	Jones	SOUTHWEST LICKING LO...
 	jones	Linda	Jones	Zanesville City Scho...
 	Kjones	Katy	Jones	Union-Scioto Local S...
 	jones0128	Celia	Jones	Chase Academy for Co...
 	djones	Darryl	Jones	East Muskingum Acade...

4. After running the query, there are several possibilities
 - a. you could not locate the user
 - b. the user has an enabled account
 - c. the user has a disabled account

In this example, there are a number of accounts under the last name of Jones, but no Timothy Jones. If however, you were looking for Darryl Jones, you would only need to add your school to their existing account and not create a new user account. If you were looking for Gary L Jones, he has an account but that account is currently disabled (indicated by the line through his username). Again, you would not need to create a new account, but would need to have his account enabled. More information on how to modify an existing user’s account can be found on Page 3.

Access Levels:

There are three different types of access levels that may be assigned to a user.

Read Only – the user can view data, but has no ability to enter or modify any data

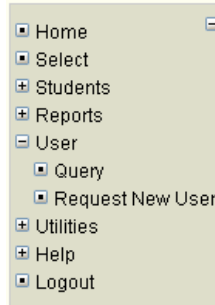
Update – the user can add and modify data

Admin – the user can add and modify data AND they can create and maintain user accounts

Adding a New User:

If you are unable to locate the user after running the user query, then you will need to create a new user account.

1. Click on Request New User, on the Main menu



2. Enter the required fields. Please pay close attention to the email address as a wrong entry here will delay the account being created. The username should be some combination of the user's first and last name (i.e.gjohnson). Each user must have a unique username.

New User Request Information		
First Name	<input type="text"/>	
Last Name	<input type="text"/>	
Username	<input type="text"/>	
Organization	<input type="text"/>	
Email Address	<input type="text"/>	
Contact Phone	<input type="text"/>	
FAX Number	<input type="text"/>	

Entity Name	IRN	Access
Demo Community School	133256	<input checked="" type="radio"/> None <input type="radio"/> Read-Only <input type="radio"/> Update <input type="radio"/> Admin
Smalltown Local Schools	47043	<input checked="" type="radio"/> None <input type="radio"/> Read-Only <input type="radio"/> Update <input type="radio"/> Admin

4. You may only grant access to Community Schools that have you listed as the financial contact in their entity profile. These schools will be listed below the new user fields.
5. The access level for any new user will default to "None". Select the community school and the security level that you wish to assign to the new user. If you do not want this user to have access to a particular entity, allow the user's access level to remain at "None".
6. When you have completed entering the data and assigning the appropriate access level for the user, click on the "Send Request" button.

- Once the account has been activated by the system administrator, the new user will receive an e-mail with their username and a password.
- NOTE:** You will receive an e-mail from the system administrator only if the e-mail address that was entered for the new user was undeliverable. Please verify the e-mail address and send the correction to csadm@nwoca.org. Make sure you include the user's first name, last name and the corrected e-mail address in your reply.











Adding or Removing an Entity to an Existing User

Query for the User:

As previously noted, you may only add and remove users from the entities that have identified you as the financial contact in their entity profile.

- Follow the instructions for running a user query on Page 3.

126 items found, displaying 1 to 25.[First/Prev] 1, 2, 3, 4, 5, 6 [Next/Last]

Username	First Name	Last Name	Organization	Email Address	Email Status	Role	Last Login
 test1	test1			test1@nwoca.org		User	04/12/2007 09:01:00 AM
 test2	test2			test2@nwoca.org		User	04/12/2007 10:14:00 AM
 veuser	veuser		Four County VOCED	bbestelle@nwoca.org		User	
 dbbbb	Darren			dd		User	
 z2	z2		z2	z2@yahoo.com		User	
 user@domain.com	Dave			smith+test@nwoca.org		User	05/08/2006 02:03:00 PM
						User	
 test3	test3			test3@nwoca.org		User	
 test4	test4			test4@nwoca.org		User	
 taccount	Test	Account	test school	taccount@aol.com		User	

- Locate the user and then click on the pencil icon next to the username. Review the user profile to confirm that the existing user is the person whose account you wish to modify.

Enabling a Disabled User:

If the user's account has been disabled (the username has a line through it), then email the system administrator at csadm@nwoca.org to have the account enabled. In your email, include the username, first name and the last name of the user. You will be notified when the account has been enabled. Upon notification you will be able to add or delete entities to the account

Adding an Entity to an Existing User:

- Follow the instructions for running a user query on Page 3.
- Locate the user and then click on the pencil icon next to the username. Review the user profile to confirm that the existing user is the person whose account you wish to modify.
- To add an entity to the user's account, use the dropdown menu next to the "Grant Access" button. This drop down menu will only display the schools that you have been authorized to maintain user accounts.

- Using the dropdown menu, select the school you wish to add to the user's account – make sure your selection is complete and then click on the Grant Access button
- Once you have made your selection, be sure to then select the Access level you wish to grant the user for the selected school.
- If you wish to add additional schools to the account, repeat steps 4 & 5.
- When you are finished adding entities, Click on the Save button.

Authorized User Information

ID 1315 *Last Login: (2007-04-12 09:01:00.0)*

Security Role District/School User

First Name test1

Last Name

Username test1

Account Status Enabled

Organization

Email Address test1@nwoca.org

Email Status

Contact Phone

FAX Number

Entity Name	IRN	Access
ADAMS COUNTY/OHIO VALLEY	61903	<input type="radio"/> Read-Only <input type="radio"/> Update <input type="radio"/> Admin
Demo Community School	133256	<input type="radio"/> Read-Only <input checked="" type="radio"/> Update <input type="radio"/> Admin
ACADEMY OF BUSINESS & TECHNOLOGY	134262	<input type="radio"/> Read-Only <input type="radio"/> Update <input type="radio"/> Admin
Smalltown Local Schools	47043	<input type="radio"/> Read-Only <input checked="" type="radio"/> Update <input type="radio"/> Admin
Acme Local School	12345	<input type="radio"/> Read-Only <input type="radio"/> Update <input type="radio"/> Admin
ADA EX VIL S.D	45187	<input type="radio"/> Read-Only <input checked="" type="radio"/> Update <input type="radio"/> Admin
ACADMY OF DAYTON	133918	<input type="radio"/> Read-Only <input checked="" type="radio"/> Update <input type="radio"/> Admin
ABC Academy Community	133355	<input type="radio"/> Read-Only <input checked="" type="radio"/> Update <input type="radio"/> Admin

Select an Entity, then click Grant Access.

Modifying A User's Entity Access:

- Run a User Query
- Select the user and click on the pencil to modify the account
- To change the access level of the user for an entity, click on the radio button that is to the left of the desired access level.
- Click the Save button

Removing a User's Access to an Entity:

- Run a User Query
- Select the user and click on the pencil to modify the account
- Click on the Scissors icon next to the name of the entity that you would like to remove from this user's account
- Click the Save button

Updating User Account Information:

Each individual user has the ability to update their own user profile. A financial contact does not have the ability to modify an individual's user profile. The user should log into the CSADM and go to Utilities on the Main Menu and select, User Profile. Then click on the Modify button.

User Profile Screen

Modify

Username	user (18)								
Name	User								
Email	yahoo@domain.com								
Phone	4195235088								
Fax	4195239276								
Address	1020 perry st Archbold OH 45875								
Organization	test school								
Security Role	USER RESIDENT								
Current Entity	Smalltown Local Schools								
Current Year	2006								
Entities	<table border="1"><thead><tr><th>Entity Name</th><th>Type</th></tr></thead><tbody><tr><td>Smalltown Local Schools</td><td>Resident District</td></tr><tr><td>County Career Center JVS</td><td>Vocational/Career Center</td></tr><tr><td>Demo Community School</td><td>Community School</td></tr></tbody></table>	Entity Name	Type	Smalltown Local Schools	Resident District	County Career Center JVS	Vocational/Career Center	Demo Community School	Community School
Entity Name	Type								
Smalltown Local Schools	Resident District								
County Career Center JVS	Vocational/Career Center								
Demo Community School	Community School								

Data Elements

Username – The username is the name the user uses to identify him/herself to the system when he/she first logs in to the system. This is what is entered each time the person logs in to the system. **This is generated by the system and cannot be changed by the user.**

User ID – this is a unique identification number that is assigned to the user when he/she establishes an account. **This is generated by the system and cannot be changed by the user.** It is the number in parenthesis () after the username.

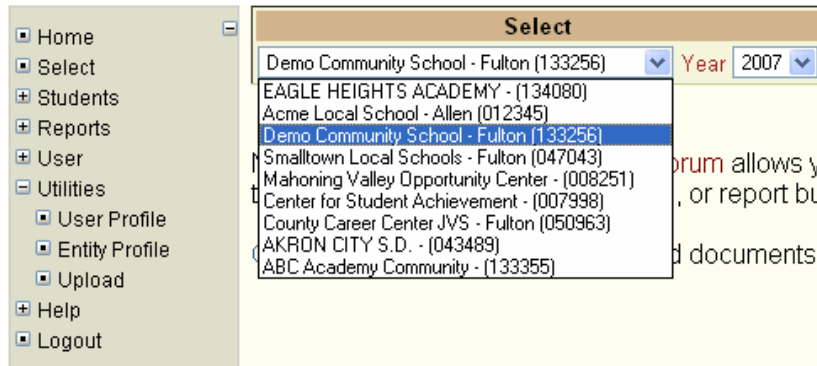
Entities – One user may have authorized access to a number of entities. All entities will be listed in the user's profile. **This list is generated by the system and cannot be changed by the user.**

1. The user should make the necessary changes.
2. Once all changes have been made, click the "Save" button to save all changes.
3. Click on the Cancel button if you do not wish to save the changes.

Managing Users via the Entity Profile:

Financial Contacts are able to manage the user accounts of their authorized schools via the Entity Profile. All users that have access to an entity are listed in the Entity Profile.

1. Click on “Select” in the Main Menu and use the dropdown menu that appears to select the school whose entity profile you wish to view.



2. Once the selection is complete (school name will appear in the top right hand side of the page), then click on “Utilities” in the Main Menu.
3. Then click on “Entity Profile”.
4. Once the profile opens, you can remove a user’s access to the entity by clicking on the scissors icon to the left of their username.
5. You may also modify the user’s access by clicking on the pencil icon. This will open up the user’s profile where you may modify their account.

Entity Information

ID 6
 Entity Type CS
 Entity Name Demo Community School
 IRN 133256
 County Fulton
 Financial Contact Mary Administrator
 Contact Email Joe.Educator@domain.com
 Contact Phone 419-222-5455
 FAX Number 419-222-4545

Community School Only

School Year: 2007

Annual Membership Units Days
 Total Annual Membership Days/Hours 120.00
 Kindergarten Program Type Full-day everyday kindergarten program
 First Day of Class Aug 22, 2006
 Last Day of Class Jun 1, 2007
 Days In Session 120.00
 Instructional Hours Per Day 7.25

Below is a list of users who have access to this entity.
 Please send changes and corrections to csadm@nwoca.org.

User Name	User Id	E-Mail	Phone Number	Access Level
test2	test2	test2@nwoca.org		Read-Only
Dave Smith	smith	smith@nwoca.org	419-267-6666	Update
test1	test1	test1@nwoca.org		Update
DAS User	das	smith@das@nwoca.org		Update
Darren Estelle	estelle	estelle@nwoca.org		Read-Only
Tom Community	ouser	tom@domain.com	419-555-9853	Admin
Dave	user@domain.com	smith+test@nwoca.org		Update
New Guy	newguy	newguy@nwoca.org	987-654-3210	Admin
Dean Reineke	reineke	reineke@nwoca.org		Update
Demo User	user	please_dont_change_this_profile@domain.com	123-456-7890	Update