

Add New Users and Set Permissions

The CRDC data submission tool can add new users to the online tool and grant specific personnel permissions to view or edit data.

The Permissions by Module table, shown on the right, has been updated.

• The Header row with column labels is now a freeze pane allowing users to scroll through the list of schools while viewing the modules.

on LEA Forn	n LEA Form Permissions or School Form Permissions to manage this user's access to the system. Update Permissions																						
A Form Permissions																							
hool 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 questions within them. To save changes you must click on Update Permissions. 																							
Click or To save Show Acronyr	n the co e chan ms	olumn ges ye	titles or ou mus	module t click	e acron on Up	iyms to date Pe	view th ermiss	ne list o ions.	f questi	ions witl	hin the	m.											
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Figure 1. School Form Permissions screen example

Below are the steps to add new users and manage permissions.

Step 1: Log into the CRDC System

Access the CRDC survey on the data submission tool at <u>http://surveys.nces.ed.gov/crdc</u>. Enter user email and password and click the green **Log In** button as shown in Figure 2.







Step 2: Access the ADMIN page

Next to the silhouette icon with the username is the link to the ADMIN section of the site, shown in Figure 3. Click on the link to navigate to the **ADMIN** page.

Civil Rights Data Collection	Home	Certification	Resources	Reports	Admin & crdcuser@crdc.com
Home					

Figure 3. CRDC Menu

Step 3: Select Add New Users

On the ADMIN home page, click on **Add New Users**, as shown in Figure 4.

User Management If you need to add additional CRDC online data entry and file upload users, you	System Management The following are tasks that can be accomplished by PSC Staff and administrator
Add New r has been registered, you can manage their user permissions y you do not have to wail for them to confirm their registration before	Schools and LEAs
ermissions.	Edit LEA Contacts
Register Users	Manage Schools
Add New Users	
Use Manage User Permissions to designate user permissions to registered users. User permissions include the ability to enter and edit data for schools, LEAs and specific data modules.	
Manage User Permissions	
LEA Administrators	

Figure 4. Admin Homepage

Step 4: Enter Username and Email Information

After clicking "Add New User", a box will appear asking to enter the first and last name of the user and their email address. Next, click **Confirm Registration**, as shown in Figure 5. 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 6.

ome >> Admin.Home >> U	er.Registration		
Register New U	ser		
User Details			Enter
First Name			Information
Last Name			
Email			
	When you select Confirm Registration, an email w that they verify their email to gain access to the C email.	vill be sent from the CRDC system to the new u RDC system. Please make sure the new user i	user to request is expecting the
	Note: You do not have to wait for the user to verif	y their email prior to setting their permissions	
	Confirm Registration Cancel	Click Confirm Registration	

Figure 5. Register New User

A new user has been created. Please note that you mus user permissions.	t designate
	ОК

Figure 6. 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 their address and completing the registration process by setting a password. However, the administrator does not need to wait for the new user to verify their email before setting the new user's permissions.

Step 5: Select User Role

Under the Manage User Permissions section of the Admin Page, there are selections for the user roles in the CRDC system, including:

- LEA Administrators: Local education agency (LEA) Administrators can add new users, enter and review data for schools and the LEA, and access reports. Every LEA Admin always has full Read, Write, and Admin permissions for their 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. LEA Staff need Read/Write permissions to be assigned.
- School Administrators: School Administrators can add new users within a specific school and enter and review data for a specific school only. School Administrators automatically have full Read/Write permissions for their assigned school.



• **School Staff**: School Staff can enter and review data for a specific school but cannot add new users to the system. School Staff need Read/Write permissions to be assigned.

Select the role assignment for the new user by clicking one of the options under the blue **Manage User Permission** header. See Figure 7.

Jser Management	System Management
you need to add additional CRDC online data entry and file upload users, you	The following are tasks that can be accomplished by PSC Staff and administrators
ust first register their name and email address using the Add New Users feature. nce a user has been registered, you can manage their user permissions mediately vurde at these to use if for them to easier the sector the sector.	Schools and LEAs
integlately. You do not have to wait for them to confirm their registration before signing permissions.	Edit LEA Contacts
Register Users	Manage Schools
Add New Users	
se Manage User Permissions to designate user permissions to registered users. ser permissions include the ability to enter and edit data for schools, LEAs and becific data modules.	
Manage User Permissions	
LEAAdministrators	
LEA Staff Select User	
Role	

Figure 7. 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 an LEA's survey. Figure 8 shows where the button appears on the LEA Staff permissions page. The green button appears in a similar location for each of the user role pages.



Figure 8. 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. Please enter the email address for the new user; the system will start searching for an existing user's email address when a user begins typing, as shown in Figure 9. Select the correct email address from the drop-down menu.

Civil Rights Data Collection	Add user to this group	is Reports Admin abgatports@mac.com
Home >> Admin Home >> LEASsian	crdc@sanametrix.com	
LEA Staff Permissions fo	crdc@ed.gov crdc@district.state.us	
This page allows you to manage user permissions the same topic area. For example, tables about mi- module has a 4-letter module acronym that is user labeled COUR-1.		os of tables about UR) module. Each Classes module is
Permissions include the ability to read, and edit da data. Write access allows users to enter and edit da	ta.	hly read tables and
There are no users who have access to this LEA. C	lick Add User to add LEA staff.	

Figure 9. 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.

Civil Rights Data Collection	Add user to this group	abigalpotts @mac.z
LEA Staff Permissions fo This page allows you to manage user permissions the same topic area. For example, tables about m module has a 4-letter module acronym that is use labeled COUR-1. Permissions include the ability to read, and edit da data. Write access allows users to enter and edit of There are no users who have access to this LEA.	Selected User Name: Abby2 Potts Email: abigail.a.potts@gmail.com Add User Cancel	os of tables about UR) module. Each Classes module is nly read tables and

Figure 10. Click Add User Button

Important Tip

The next series of steps varies depending on the user role. The following is 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 see additional steps for assigning "LEA Admin", "School Admin", or "School Staff" permissions.



Step 9 (LEA Staff): Set Permissions for a 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 the administrator can manage permissions for the modules within both the LEA and School forms or remove or disable access for that user. Set permissions for the user by clicking the plus (+) sign next to the username and email address.

	CRDC Civil Rights Data Collection		Home	Certification	Resources	Reports	Admin
Home >>	Admin Home >> LEA Staff						
	LEA Staff Permiss	sions for School District ABC	C			-	
	This page allows you to manage up the same topic area. For example, module has a 4-letter module acror labeled COUR-1.	er permissions for the LEA Form and School Form module tables about math and science courses and classes are gr ym that is used to number tables within modules. For exait the science of the science	is within this LEA rouped in the Cou mple, the first tab	Modules are group rses & Classes(CO le in the Courses 8	ps of tables about UR) module. Each & Classes module i	+ Ad	d User
Click the	Permissions include the ability to re data. Write access allows users to	ad, and edit data for schools. LEAs, and specific form mo enter and edit data.	dules. Read Acce	ss allows users to e	only read tables ar	nd	
Plus Sign	To manage a user's permissions cli	ck on their name below. To add staff to this LEA click on A	Add User.				

Figure 11. Access Options for Setting Permissions

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

Expanding the options allows a user to grant permissions by 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 12 shows how to add access on the LEA form by checking all or some topic-area modules to grant "write" access.



Figure 12. Setting LEA Form Permissions

Individual permissions can also be set for schools in a LEA. Figure 13 show options for adding permissions by topic-area module. When the administrator selects School Form Permissions, the process is 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.



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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.



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

Figure 14 shows how checking write next to Day Dreamer Academy will add access across all school-level data for that school.

	ermis	sions																				
 Select s set to N permiss 	chools o Perri	s and n	nodules is. You c	to gra an ch	ant this u ange the	iser per e permi	missions	on to the s for spe	School	Form nools to	for spe Read	cific sc Access	hools a s, Write	nd mo Acces	dules. T s, or Ad	The de dmin (a	fault pe ability to	rmissio enter (ons for data Al	each si ND mar	chool a nage u	are ser
· To give	this us	er acc	ess to a	modu	le for al	schoo	ls, clic	k on the	box ab	ove the	at modu	ile.										
 Click on 	the co	olumn	titles or r	modu	le acron	yms to	view t	he list of	questio	ons wit	hin ther	n.										
 To save 	chan	ges yo	ou must	click	on Upo	late Pe	rmiss	ions.														
Show Acronyn	ns																					
	Gene	ral Perr	nission								Grant "V	Vrite" P	ermissio	ons by	Module							
		Levels	5																			
				1	Tip	: Cli	ck	"wr	ite"	by	the	sc	hoc					0				C
School Name	Read	Write	Admin		Тір	Cli	ck	"wr	ite"	by	the	sc	hoc		ATHL	DISC	ARRS	OFFN	HIBS	RSTR	JUST	
School Name	Read	U Write	Admin		Tip: nan	: Cli ne t	ck to a	"wr add	ite" acce	by ess	the	sc	hoc		ATHL	DISC	ARRS	OFFN	D HIBS	C RSTR	U JUST	
School Name	Read	U Write	Admin		Tip nan	: Cli ne t	ck to a	"wr add	ite" acce	by ess	the	sc	hoc		ATHL	DISC	ARRS	OFFN	HIBS	RSTR	JUST	INE
School Name Day Dreamer Academy 019999900001	C Read	Urite	Admin		Tip: nan	Cline t	ck to a	"wri add	ite" acce	by ess	the o	sc	hoo		ATHL	DISC	ARRS	OFFN	HIBS	RSTR	JUST	

Figure 14. Setting School Form Permissions by Adding Access to Schools.

Access can be customized by checking or unchecking any box on the grid. Figure 15 shows that the user is now given permission to upload course data for Firehouse Elementary.

RESOURCE DOCUMENT



chool Form P	Permis	ssions																				
 Select s set to N permiss To give Click on 	chools o Perr ions). this us	s and n mission ser acc	nodules is. You o ess to a titles or	to gran can cha modul module	nt this u ange the le for al e acron	iser pei e permi I schoo yms to	missio issions ils, click view th	n to the for spe c on the list of	School cific sch box ab questio	I Form hools to hove the	for spec o Read / at modu hin then	cific sci Access IIe. n.	hools a s, Write	nd mod Access	lules. 1 6, or Ac	The def Imin (a	fault pe bility to	rmissio enter (ns for d data AN	each so ID man	thool a lage ut	re ser
To save Show Acronyn	Gene	ral Perr	mission	t click	on Upo	late Pe	ermis	Ad mo	d a odu	ces les	s to in c	sp ert	ecif ain	ic sch	ool	s						
			0	0			0	by	che	ecki	ng	oru	Incl	nec	kin	g b	oxe	s.				0
School Name	Read	Write	Admin	DIND	SCHR	PSCH	ENRL	PENR	COUR	APIB	ECAM	STAF	SECR	RETN	ATHL	DISC	ARRS	OFFN	HIBS	RSTR	JUST	INE
Day Dreamer Academy 019999900001	12			0		0	0		0	6					0	0	0	0	0	0	0	0
Firehouse Elementary 019999901010	0	0	0	0	0	0	0	0		0	0	0		0	0	0	0	0	0	0	0	0

Figure 15. Setting Customized Access across Schools and Modules



Have more questions about setting custom access? See the CRDC user guide at https://crdc.communities.ed.gov/resources/crdc-submission-system-user-guide .

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 16.

- crdc@sanametrix.com OCR CRDC	🗐 Remove User	O Disable access	
Click on LEA Form Permissions or School Form Permissions to manage this user's access to the system.		Update Permissions	
		Last	Step: Click
		Upda	ate Permissions

Figure 16. Click Update Permissions

The following outlines the process for setting permissions for "*LEA Admin*", "*School Admin*", or "*School Staff*" after step 8 has been conducted.

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 their LEA and all schools within it. Figure 17 shows how a new LEA Admin will appear once the user is added to the group.

RESOURCE DOCUMENT



LEA	Admins		
The pag	e allows you to view LEA Admins for partic	ular LEAs. Select the LEA you'd like to view below	
State	Indiana Concord Community :	Schools	
+/	Add User Remove User(s)		
	Name	Email	
	CRDC Tester	crdctester2020@gmail.com	

Figure 17. Click the Checkbox Next to the Username

Step 9 (School Admin): Enable Permissions for School Admin

Managing user permissions for School Administrators requires that the specific school(s) be chosen for the administrator to access. See the example in Figure 18 in which a school choice is required to assign School Admin permissions. Note: Users can be added as School Administrators for multiple schools.

School Admin			
Colort a State:	Alabama		
Select a State:	Alabama	Ť	
Select an LEA:	0199999:Rainbow County	~	
Select a School:	Select a School	~	1
	Select a School		
The School Admin function allows view and edit data.	01999900001039 Uneamer Academy 019999901010-Firehouse Elementary 019999901212:Imagine Middle School 019999907770:Lucky Strikes High School 019999907770:Lucky Strikes High School		nin permission can add new users for their school, as well as

Figure 18. Select a School

Once a school is selected, users can be added with the **+Add User** button as shown in Figure 19. No further steps are required since School Administrators are given full Write Access for their allocated school(s).

	1000000			
Select a State:	Alabama		~	
Select an LEA:	0199999:Rainbow County		*	
Select a School: he School Admin iew and edit data	019999900001:Day Drean	permissions for a school or schools. Sta	aff with School Admin permission can add new users for	their school, as well as
Select a School: he School Admin iew and edit data chool Admin user	unction allows you to assign administrative i can add new users for their school, as well	permissions for a school or schools. Sta I as view and edit data. If you want to ac	aff with School Admin permission can add new users for dd a user who is not listed, select Add User to register a i	their school, as well as new user for this school
Select a School: he School Admin iew and edit data. chool Admin user + Add User	unction allows you to assign administrative is can add new users for their school, as well it Remove User(s) Name	permissions for a school or schools. Sti II as view and edit data. If you want to an Email	aff with School Admin permission can add new users for dd a user who is not listed, select Add User to register a l	their school, as well as new user for this school

Figure 19. Add School Admin Users



RESOURCE DOCUMENT

Step 9 (School Staff): Add Access for School Staff

Managing user permissions for School Staff is simpler than for LEA Staff. For School Staff, permissions only need to be defined for one school. Note: Users can be added as School Staff for multiple schools.

First, select the school to grant Read/Write access for a new user, as shown in Figure 20.

Home >> Admin Home				
	School Permissions	;		
	Select a State:	Indiana 1802400.Concord Community Schools		
	Select a School: School permissions allows you to	Select a School Select a School R024000269: Concord Community High School R0240000269: Concord East Side Elementary Sch R024000244: Concord Intermediate School R024000271: Concord Aunior High School R024000272: Concord An. Bow Elementary School R0240000273: Concord South Side Elementary Sch R024000273: Concord South Side Elementary Sch R02400	~	Back

Figure 20. Select a School

Once a school is selected, users can be added, giving them Read Access. This means the school staff can see the school form(s) but cannot modify the data. To update permissions and give Write Access for school form(s), click the **School Module Permissions** button next to the new user's account, as shown in Figure 21.

Select	a State: la	ıdiana		
Select	an LEA: 1	802400:Concord Community Schools		
Select	a School:	180240000269:Concord Community High School	~	
School p The de Select If you y	ermissions allows you to fault permission for all re a user below to set their want to add a user who is dd User X Remove U	set permissions for school staff to enter and edit dat gistered School Staff is No Access. You must set pe CROC system permissions for the School Form. Yo not listed, select Add User to register a new user to serifs)	a for a specific school. missions for all users before they will be able to access will be able to give them write access to specific topic this user group.	s the tool. modules (e.g. Athletics)
School pr The de Select If you v	ermissions allows you to : fault permission for all re a user below to set their want to add a user who is id User	set permissions for school staff to enter and edit dal gistered School Staff is No Access. You must set pe CROC system permissions for the School Form. Yo not listed, select Add User to register a new user to ser(6)	a for a specific school. missions for all users before they will be able to access will be able to give them write access to specific topic this user group.	s the tool. modules (e.g. Athletics) (
School pr The de Select If you v	ermissions allows you to : fault permission for all re a user below to set their want to add a user who is tid User X Remove U Name	set permissions for school staff to enter and edit dal gistered School Staff is No Access. You must set pe CROC system permissions for the School Form. Yo not listed, select Add User to register a new user to ser(6) Email	a for a specific school. missions for all users before they will be able to access will be able to give them write access to specific topic this user group.	s the tool. modules (e.g. Athletics)
School p The de Select If you v	ermissions allows you to : fault permission for all re a user below to set their want to add a user who is id User X Remove U Name School Staff	set permissions for school staff to enter and edit dal gistered School Staff is No Access. You must set pe CRDC system permissions for the School Form. Yo not listed, select Add User to register a new user to ser(o) Email schoolstaff@crdc.com	a for a specific school, missions for all users before they will be able to access will be able to give them write access to specific topic this user group. C School Module Permissions	s the tool. modules (e.g. Athletics)
School pr The de Select If you v	ermissions allows you to fault permission for all re a user below to set their want to add a user who is dd User X Remove U Name School Staff School Staff 2	set permissions for school staff to enter and edit dal gistered School Staff is No Access. You must set pe CROC system permissions for the School Form. Yo not listed, select Add User to register a new user to scr(c) Email schoolstaff@crdc.com 2schoolstaff@crdc.com	a for a specific school. missions for all users before they will be able to access will be able to give them write access to specific topic this user group. 2 School Module Permissions 2 School Module Permissions	s the tool. modules (e.g. Athletics) (

Figure 21. Add Users and 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 22. Selecting the top check box selects all modules for the School Form.





	· Ca int - Ca	or on the school module to select the modula(a) in the school the be top left come. ck on Update Permissions to save this user's permissions.	t you want this user to have data only permissions for. To belief	t all modulae, un	ork the box th	at will appear
		Arran	New	Arren		
	-	Sciet .	Served Characteristics	No. Arrena	7	
	10	PSOI	Deschool	No Access	-	Last Step: Click
Click module		D.B.	Engineer	No Access		Update Permissions
heckboxes to	0	PDR	Program Enrollment (Offed & talanted, Dual Enrollment, Credit Recovery)	No Access		
add access.		COUR	Courses & Classes	No Access		
		APIB	Advanced Placement (AP) 5 International Baccalaureate Diploma Programme (IB) Enrollment	NO Access		
	•	EXAM	SATIACT & Advanced Placement (AP) Exern	No Access		
	•	\$TA#	School & School Support Staff	No Access		
	•	5007	School Security Staff	No Access		
		4854	Chronic Abermeelen & Retention	No Access		
		ATHL	Single-sox interacholastic Athletics	No Access		
		DISC	Student Discipline (Suspension, Expulsion, Corporal Punstment)	No Access		
		ARRS	Student Deciptine (Hefensis to Lew Enforcement & School-related America)	NO ACCORE		
		OFFN	Offenses	No Access		
	•	H85	Harassment & Bullying	No Access		
	•	RSTR	Restraint & Seclusion	No Access		
		EXPO	School Expenditures (Personnel and Non-Personnel)	No Access		
		JUST	Justice Facilities	No Access		

Figure 22. Click "Update Permissions"

Removing Permissions

If a user needs to be removed from having access as an LEA Admin/School Admin/School Staff, go to the corresponding Permissions pages described in previous sections. To remove a user, click the checkbox listed on the permissions page, then click **Remove User(s)** as shown in Figure 23.

	Home >> Admin	Home		
	LEA Admins The page allows you to view LEA Administor particular LEAs. Select the LEA you'd like to view below			
	State: Alab LEA: Al Ins	aama st Deaf And Blind	Step 2. Click 'Remove Users(s)' button to remove permissions.	
Step 1. Click checkbox for users.		Name	Email	
		Test First Name Test Last Name	CRDC@Sanametrix.com	

Figure 23. Removing User Permissions

Contact the Partner Support Center

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