

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.

Click on LEA Form Permissions or School Form Permissions to manage this user's access to the system.

Update Permissions

LEA Form Permissions

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 questions within them.
- **To save changes you must click on Update Permissions.**

Show Acronyms

	General Permission Levels			Grant "Write" Permissions by Module																				
	Read	Write	Admin	DIND	NBIN	SCHR	PSCH	ENRL	PENR	COUR	APIB	EXAM	STAF	SECR	RETN	ATHL	DISC	ARRS	OFFN	HIBS	RSTR	JUST	INET	
Rain Elementary 019999912345	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>												

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 <http://surveys.nces.ed.gov/crdc>. Enter user email and password and click the green **Log In** button as shown in Figure 2.

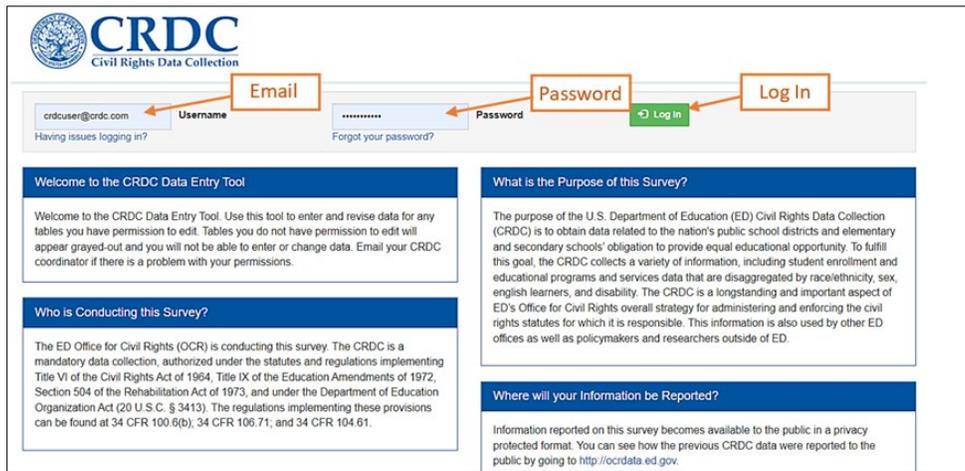


Figure 2. Log-In Screen

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.



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.

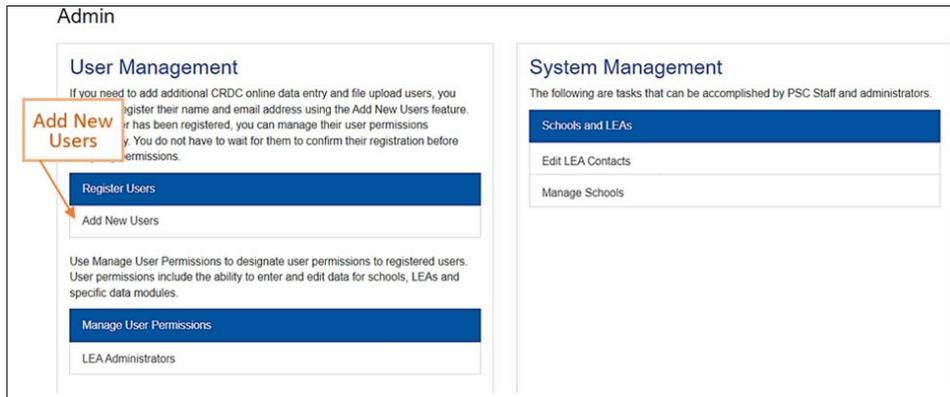


Figure 4. Admin Homepage

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.

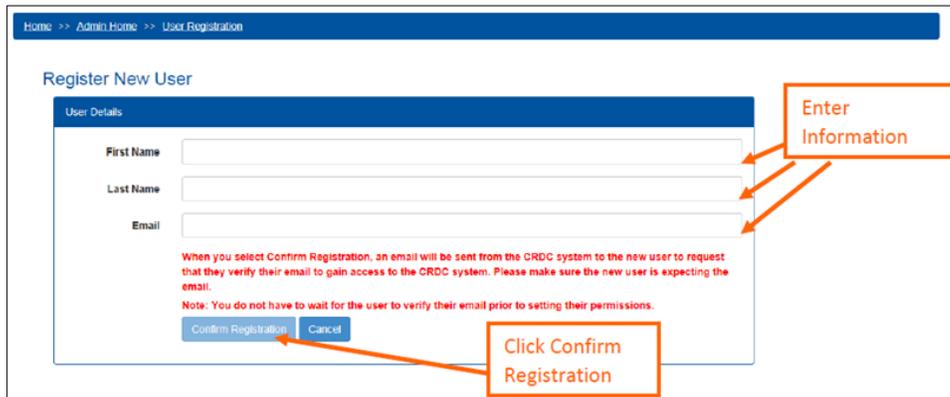


Figure 5. Register New User

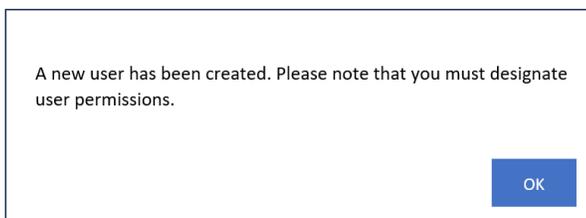


Figure 6. Confirmation that a new user was created

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.

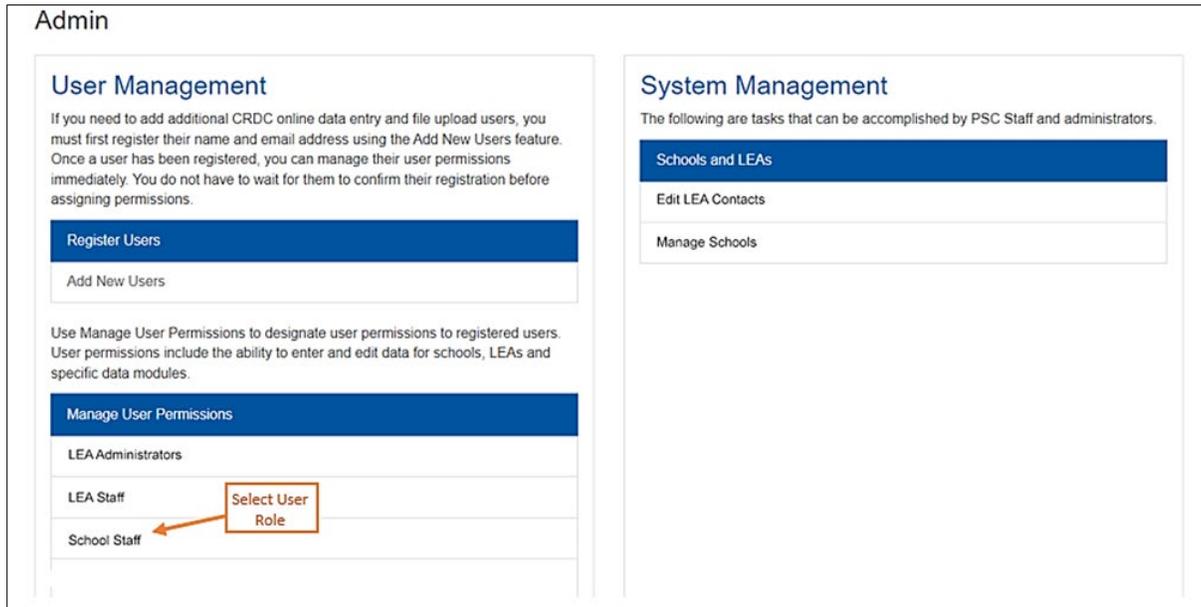


Figure 7. ADMIN Home Page – User Management

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.

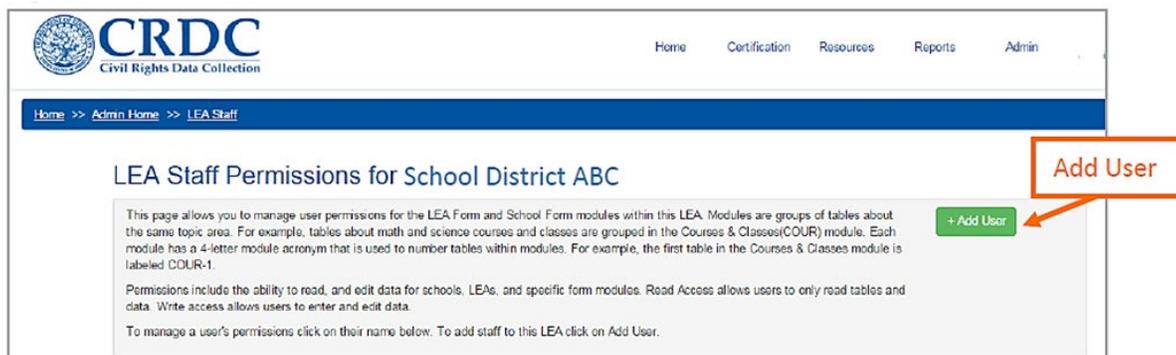


Figure 8. Add User to LEA Staff

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.

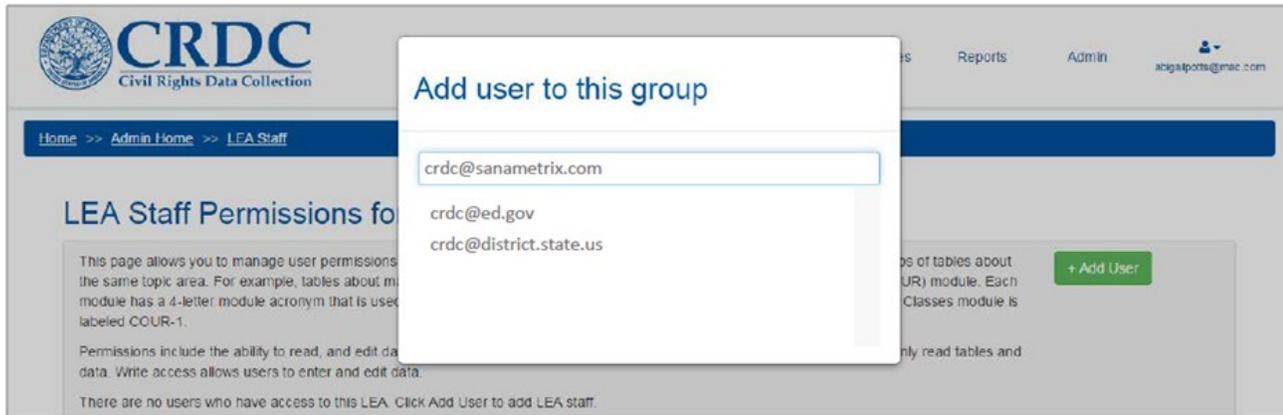


Figure 9. Add Users by Typing Email Address

Step 8: Click Add User

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

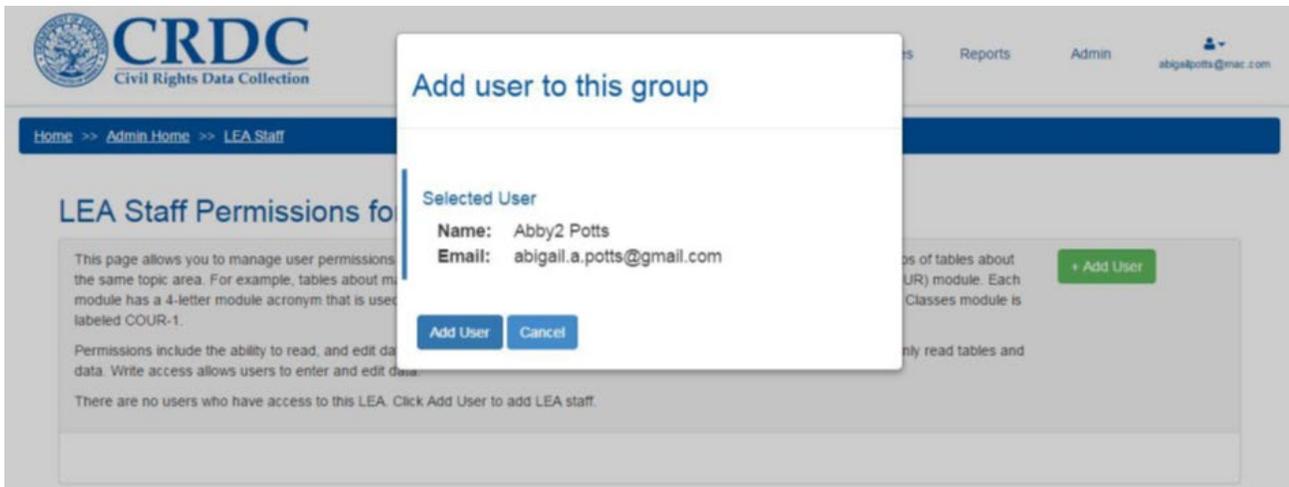


Figure 10. Click **Add User** Button

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.

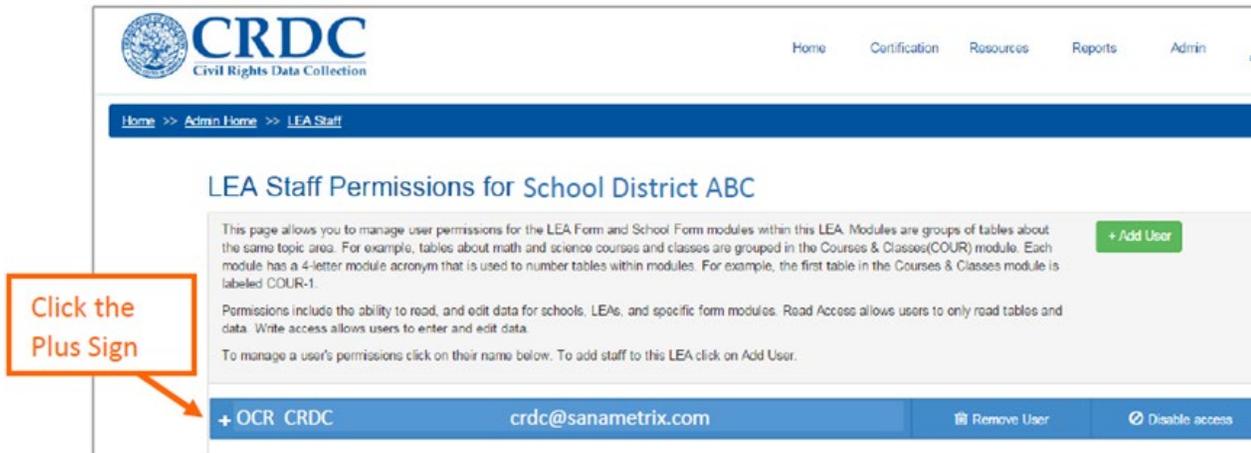


Figure 11. Access Options for Setting Permissions

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.

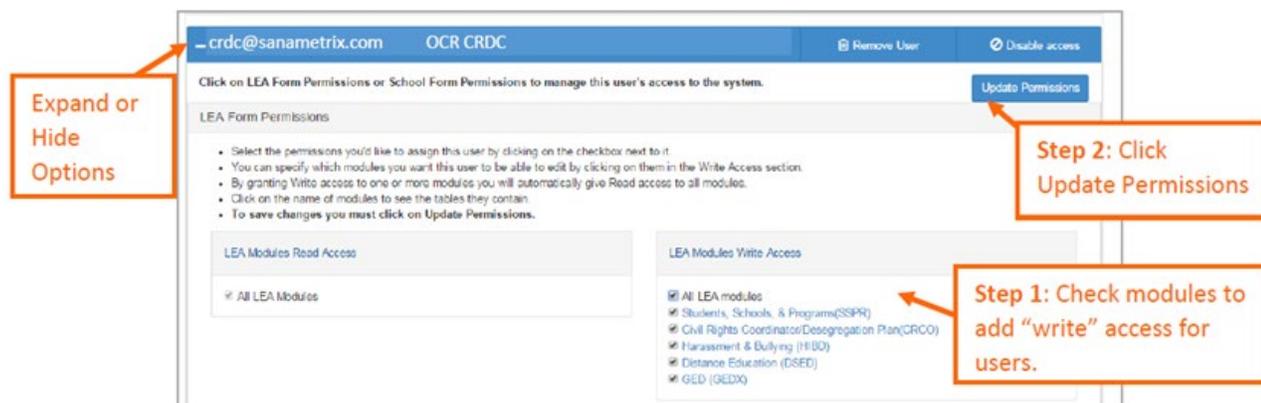
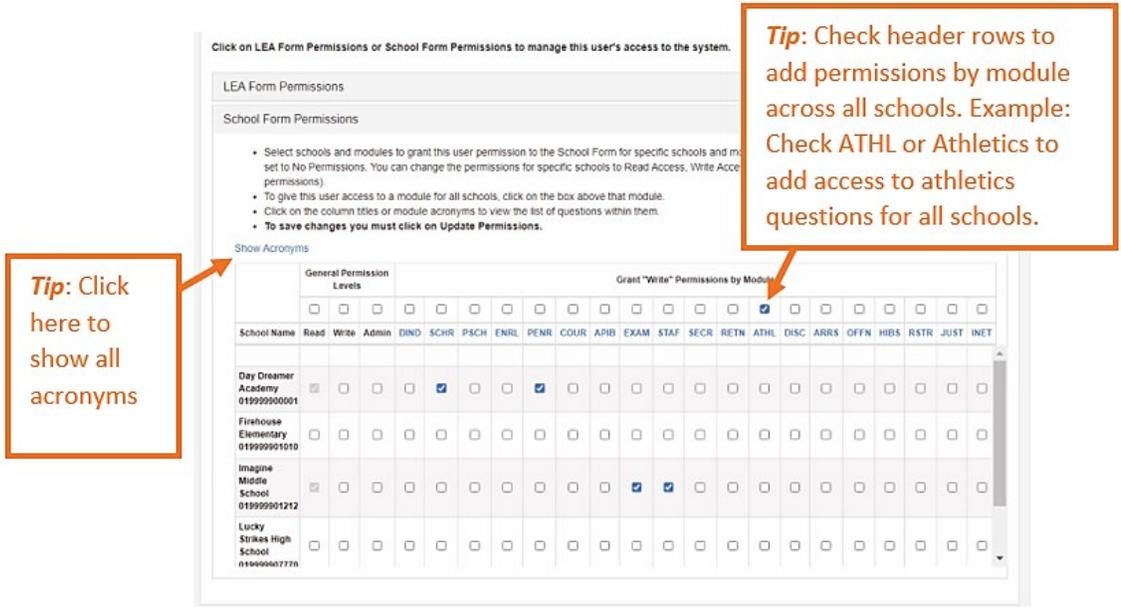


Figure 12. Setting LEA Form Permissions

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.



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.

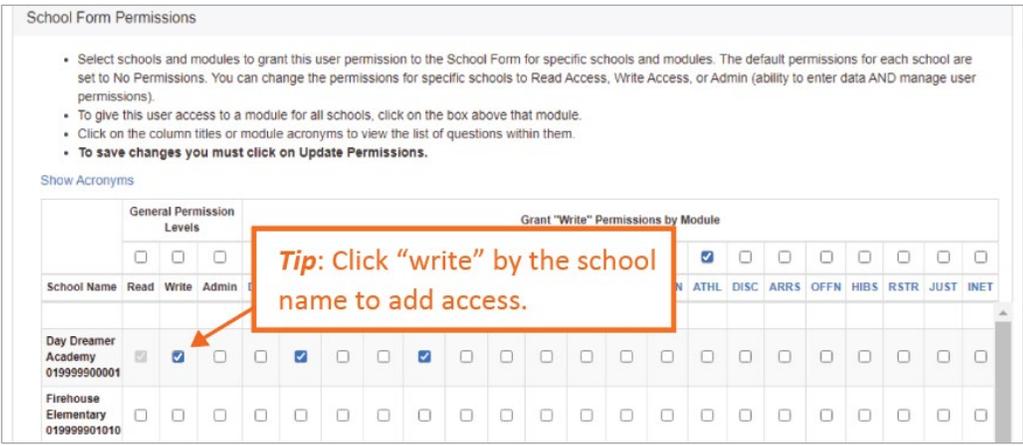


Tip: Click here to show all acronyms

Tip: 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.



Tip: Click "write" by the school name to add access.

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.

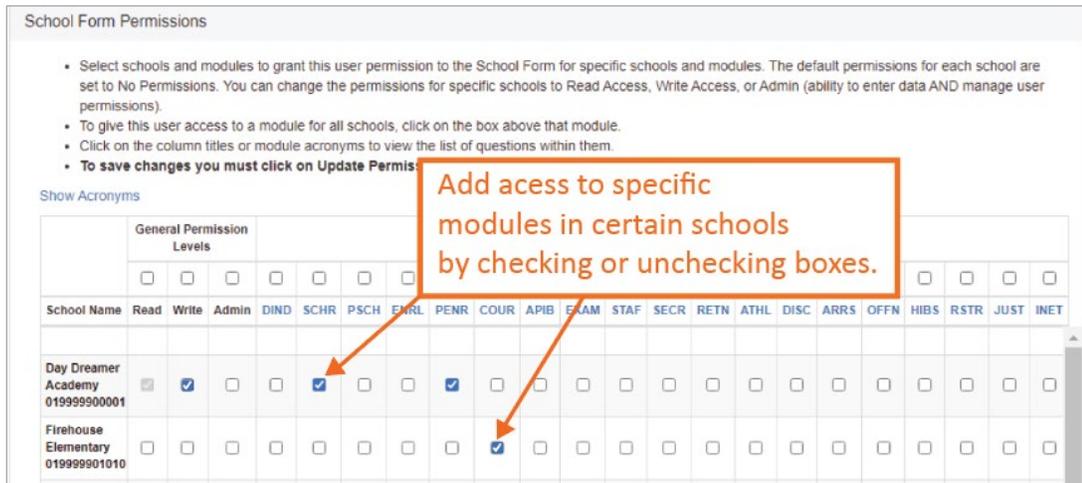


Figure 15. Setting Customized Access across Schools and Modules

 **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.

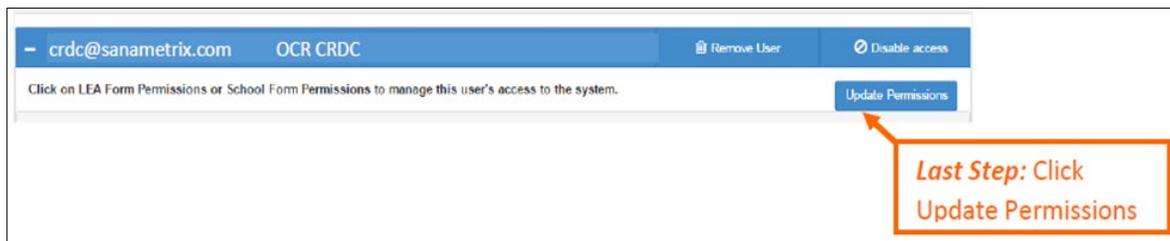
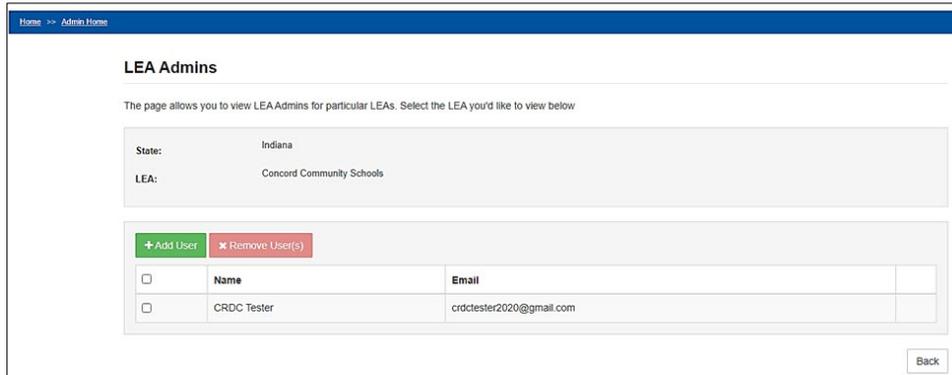


Figure 16. Click Update Permissions

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.



Home >> Admin Home

LEA Admins

The page allows you to view LEA Admins for particular LEAs. Select the LEA you'd like to view below

State: Indiana
LEA: Concord Community Schools

+ Add User ✖ Remove User(s)

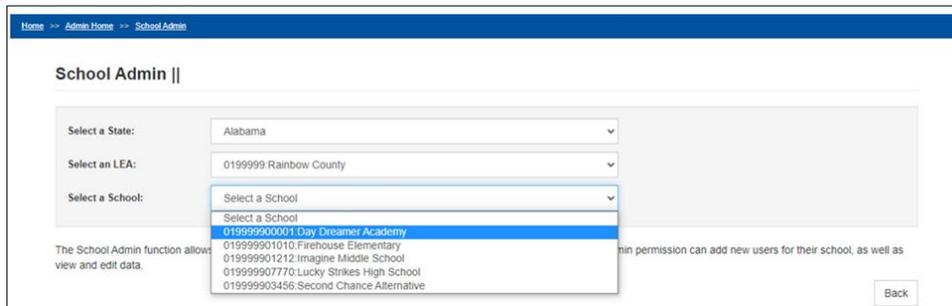
<input type="checkbox"/>	Name	Email
<input type="checkbox"/>	CRDC Tester	crdcster2020@gmail.com

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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.



Home >> Admin Home >> School Admin

School Admin ||

Select a State: Alabama
Select an LEA: 0199999 Rainbow County
Select a School: [Dropdown Menu]

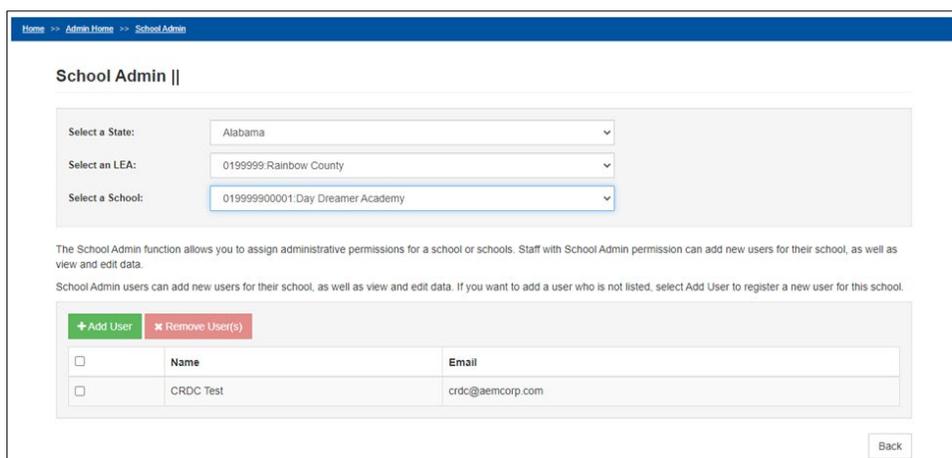
The School Admin function allows you to assign administrative permissions for a school or schools. Staff with School Admin permission can add new users for their school, as well as view and edit data.

01999990001 Day Dreamer Academy
019999901010 Firehouse Elementary
019999901212 Imagine Middle School
019999907770 Lucky Strikes High School
019999903456 Second Chance Alternative

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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).



Home >> Admin Home >> School Admin

School Admin ||

Select a State: Alabama
Select an LEA: 0199999 Rainbow County
Select a School: 01999990001 Day Dreamer Academy

The School Admin function allows you to assign administrative permissions for a school or schools. Staff with School Admin permission can add new users for their school, as well as view and edit data.

School Admin users can add new users for their school, as well as view and edit data. If you want to add a user who is not listed, select Add User to register a new user for this school.

+ Add User ✖ Remove User(s)

<input type="checkbox"/>	Name	Email
<input type="checkbox"/>	CRDC Test	crdc@aemcorp.com

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Figure 19. Add School Admin Users

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.

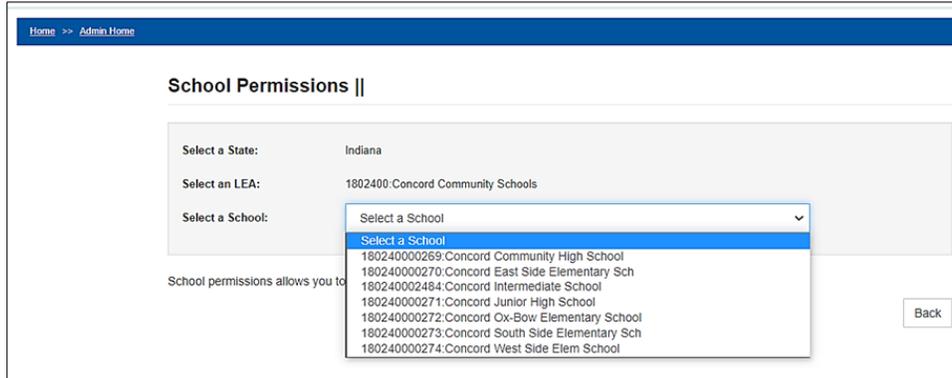


Figure 20. Select a School

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.

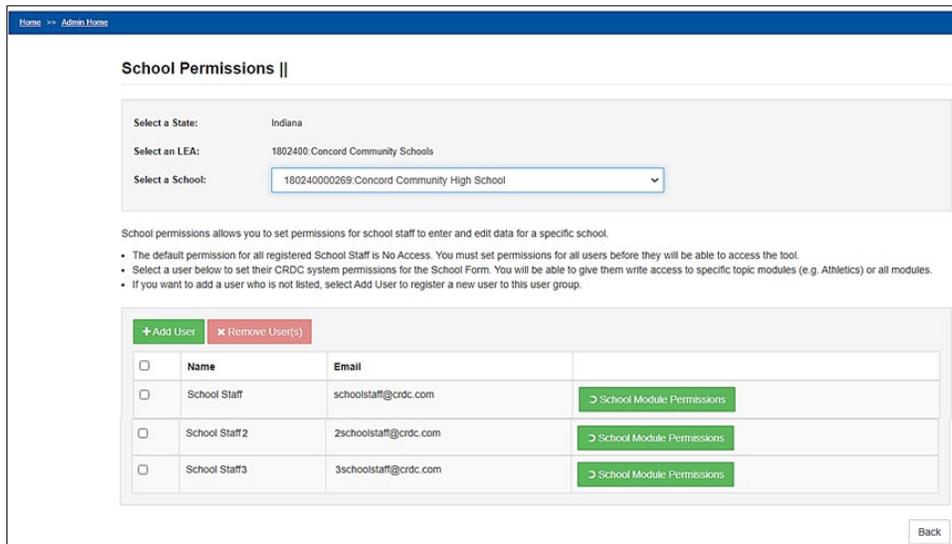


Figure 21. Add Users and Click “School Module Permissions”

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.

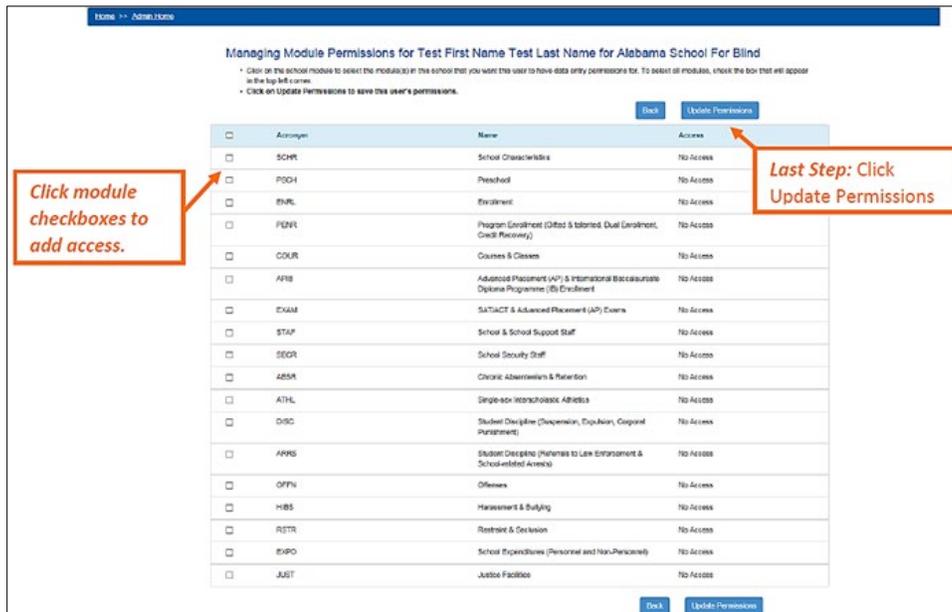


Figure 22. Click “Update Permissions”

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.

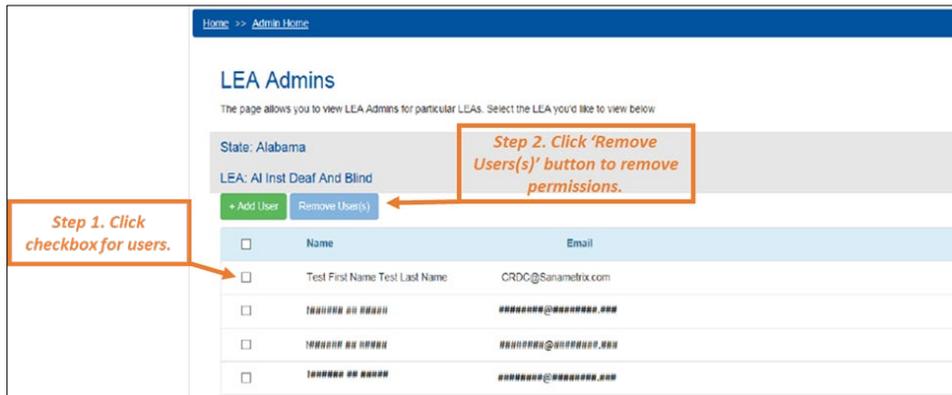


Figure 23. Removing User Permissions

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