<u>LACES Account Creation</u>

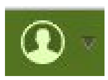
Persons with access to your database may be assigned these permission based-roles.

Agency System Administrator	Person with this role: ● Has access to the dashboard area only; may set dashboard widgets but is not allowed to drilldown. ● Is allowed to create user accounts. ● Is allowed to manage/edit existing user accounts including: o resend activation links o inactivate accounts o assign a different role to an account o unlock locked accounts Only one person in your agency should be assigned this role. **This person may also be assigned Agency Full Access or Agency Read Only in addition to the Agency System Administrator role.**
Agency Full Access	Persons with this role: ● Have access to **all** areas of the database. ● Are allowed to enter, edit, and delete records at all areas.
Agency Read Only	Persons with this role: ● Have read only access to all areas of the database. Toolbar icons that allow data entry are not available with this role.
Teacher I	Persons with this role: ● Must first be entered as a *staff at the Staff area and be assigned to classes and/or workshops. ● Have access to only their assigned classes and workshops. ● <u>**May**</u> add and edit hours and comments in their assigned classes and workshops. ● <u>**May not**</u> complete students in their assigned classes and workshops. ● <u>**May not**</u> edit the enrollment records for students in their assigned classes and workshops. ● <u>**May not**</u> delete.
Teacher II	Persons with this role: ● Must first be entered as a *staff at the Staff area and be assigned to classes and/or workshops. ● Have access to only their assigned classes and workshops. ● <u>**May**</u> add and edit hours and comments in their assigned classes and workshops.

	• **<u>May</u>** complete students in their assigned classes and workshops. • **<u>May</u>** edit the enrollment records for students in their assigned classes and workshops. • **<u>May not</u>** delete.
Teacher III	Persons with this role: • Must first be entered as a *staff at the Staff area and be assigned to classes and/or workshops. • Have access to only their assigned classes and workshops. • **May** add and edit hours and comments in their assigned classes and workshops. • **May** complete students in their assigned classes and workshops. • **May** edit the enrollment records for students in their assigned classes and workshops. • Delete Students and Instructors from their assigned classes. ○ if he deletes himself then he would no longer have access to that class and someone would have to re-assign him to the class if he still needs access. • Delete student hours and staff hours in their assigned classes. • Have Read-only access to in the Student area for students enrolled in their assigned classes.
Tutor	Persons with this role: • Must first be entered as a *tutor at the Tutor area and be assigned to groups and/or matched in pairs. • Have access to only their assigned groups and pairs. • **<u>May</u>** add and edit hours and comments in their assigned groups and pairs. • **<u>May</u>** complete students in their assigned groups. • **<u>May</u>** dissolve or activate their assigned pairs. • **<u>May</u>** edit the enrollment records for students in their assigned groups. • **<u>May not</u>** delete.
	*Persons who are entered as a staff and a tutor may be assigned a teacher role *and* the tutor role in order to see all of their assignments.
Data Entry Clerk I	Persons with this role: • **<u>May</u>** add and edit all records. • **<u>May not</u>** delete.

	• Does not see the All areas.
Data Entry Clerk II	Persons with this role: • **<u>May</u>** add and edit all records. • **<u>May</u>** delete. • Does not see the All areas.
Data Entry Clerk III	Persons with this role: • Only has access to the Student and Dashboard area • **<u>May</u>** add and edit student records. • **<u>May not</u>** delete.

<u>Create New User Accounts</u>

1. Sign in as Agency System Administrator.
2. Click the Profile icon. 
3. Select Account Manager from the dropdown list.
4. Click +Add New Account.
5. Enter the required fields.
    a. Account names must be unique.
    b. Email addresses may only be associated with one account.
6. Save and Return.
7. Open the account record.
8. The role <Agency name> Agency role will be added automatically. *This role establishes the account as part of the agency, and by itself has no permissions assigned.*
9. Click the Assign button at the Roles tab.
10. Check the row for the client and agency name at Agency Access. (Client refers to your state.)
11. Check the Role Assignment to be assigned to the new user account.
12. Click the Assign button.

> A link will be sent to the email address associated with the new account with an activation link to set a password and security question. This link is only active for 7 days. If the account was not activated, the Agency System Administrator may resend the activation link.

<u>Map to Person</u>

New accounts that haves been assigned the Teacher I, Teacher II, or Tutor role must be mapped to the appropriate person record. ***All other roles are not mapped.***

1. Open the account record.
2. Click the Account Details tab.
3. Click Map to Person.
4. Select the person to map to the account. (Only one person can be mapped to an account.)
5. Click the Map Person button.

<u>Teacher I, Teacher II, and Tutor Roles</u>

Before creating accounts with the Teacher I, Teacher II, or Tutor roles, a person with a full access account must first:

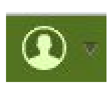
1. Enter student records.
2. Enter staff and/or tutor records.
3. Enter class, group, and workshop records.
4. Enroll students into the applicable class, group, and workshops.
5. Assign the staff member to the applicable classes and workshops.
6. Assign the tutor to the applicable groups.
7. Create the tutor/student pair records.

Multiple staff members may be assigned to a class and workshop, and multiple tutors may be assigned to a group. The Teacher I, Teacher II, and Tutor accounts may view all assigned instructors and add hours for all assigned instructors.

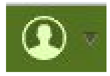
Resend the activation link to an existing user account

1. Open the account record.
2. Select the Account Details tab.
3. Click the link 'Resend Activation link for this account.'

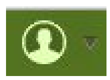
Inactivate accounts for persons no longer with your agency

1. Sign in as Agency System Administrator.
2. Click the Profile icon. 
3. Select Account Manager from the dropdown list.
4. Open the account record.
5. Click the Account Details tab.
6. Change Account Status to Inactive.
7. ***Optional*:** Remove mapping if the account is mapped to a staff or tutor record.
8. Save.

Assign a different role to an existing account

1. Sign in as Agency System Administrator.
2. Click the Profile icon. 
3. Select Account Manager from the dropdown list.
4. Open the account record.
5. At the Roles tab, delete the role that is no longer applicable by clicking the delete icon.
    a. Do not delete the <Agency name> Agency User role. Doing so will remove the account name from the list. If this happens, contact tech support to restore the account name to the account manager grid.
6. Click the Assign button.
7. Check the row for the client and agency name at Agency Access. (Client refers to your state.)
8. Check the Role Assignment to be assigned to the account.
9. Click the Assign button.

Unlock locked account

1. Sign in as Agency System Administrator.
2. Click the Profile icon. 
3. Select Account Manager from the dropdown list.
4. Open the account record.
5. Click the Account Details tab.
6. Change Account Status from Locked to Active.