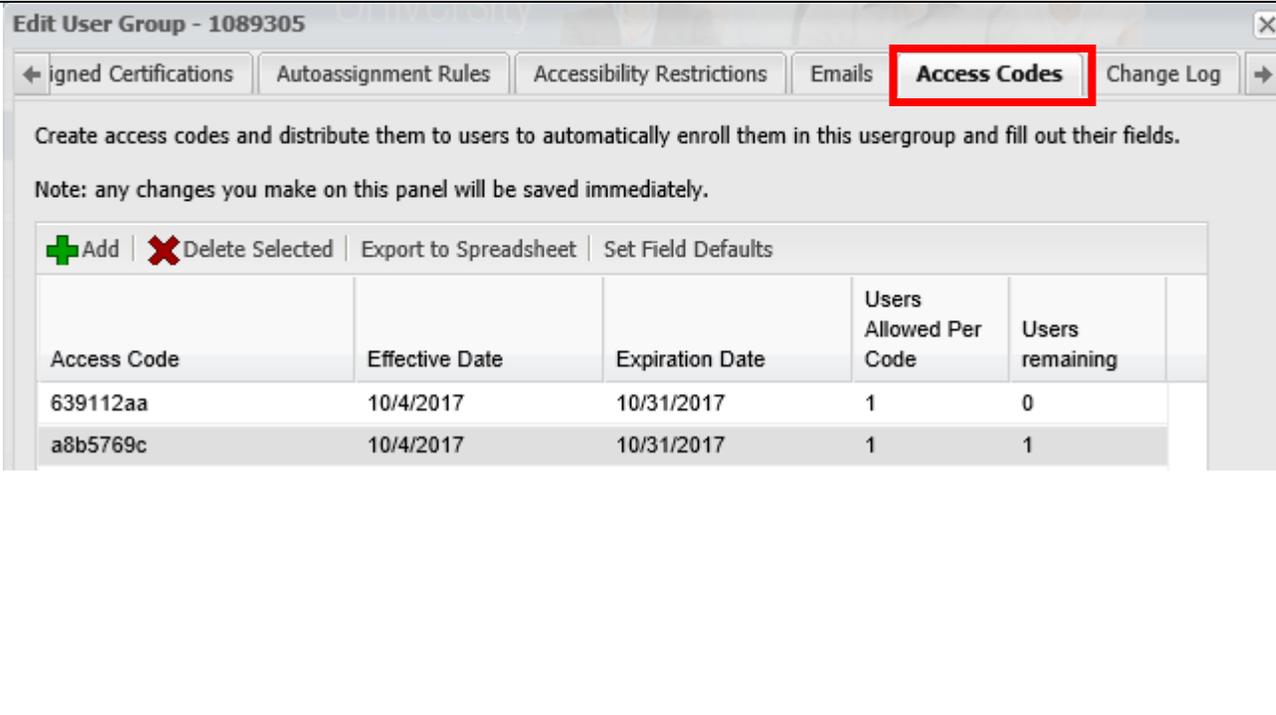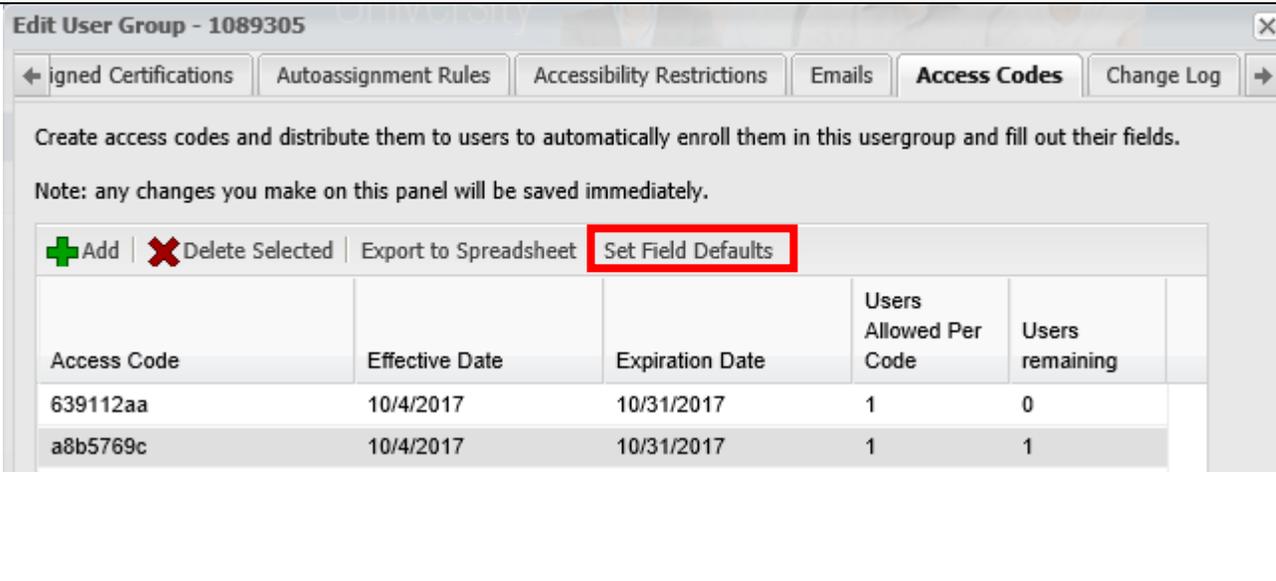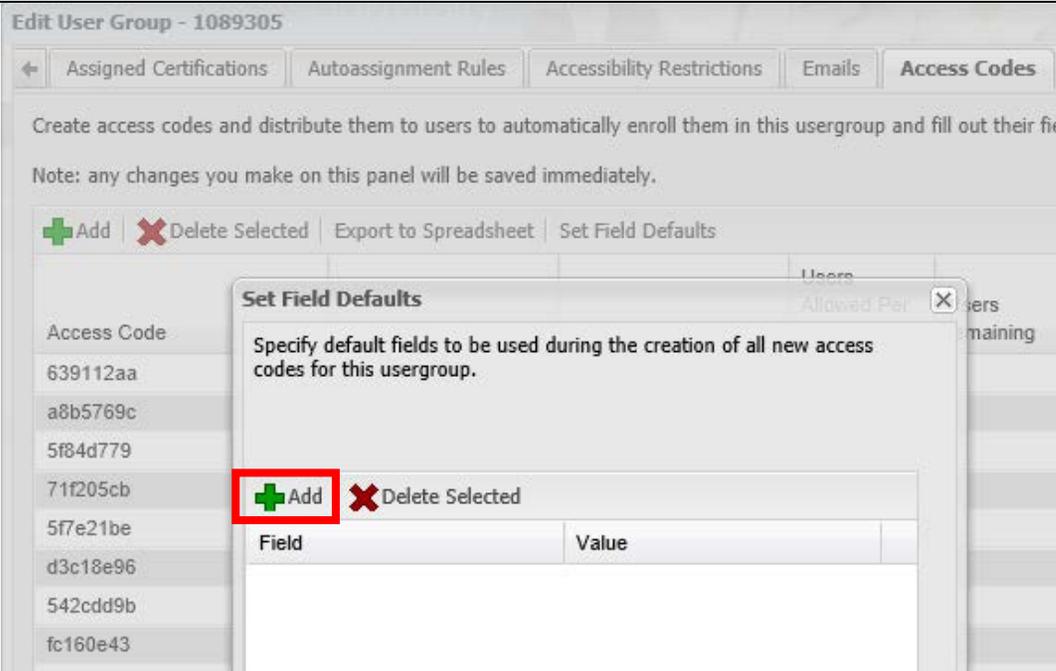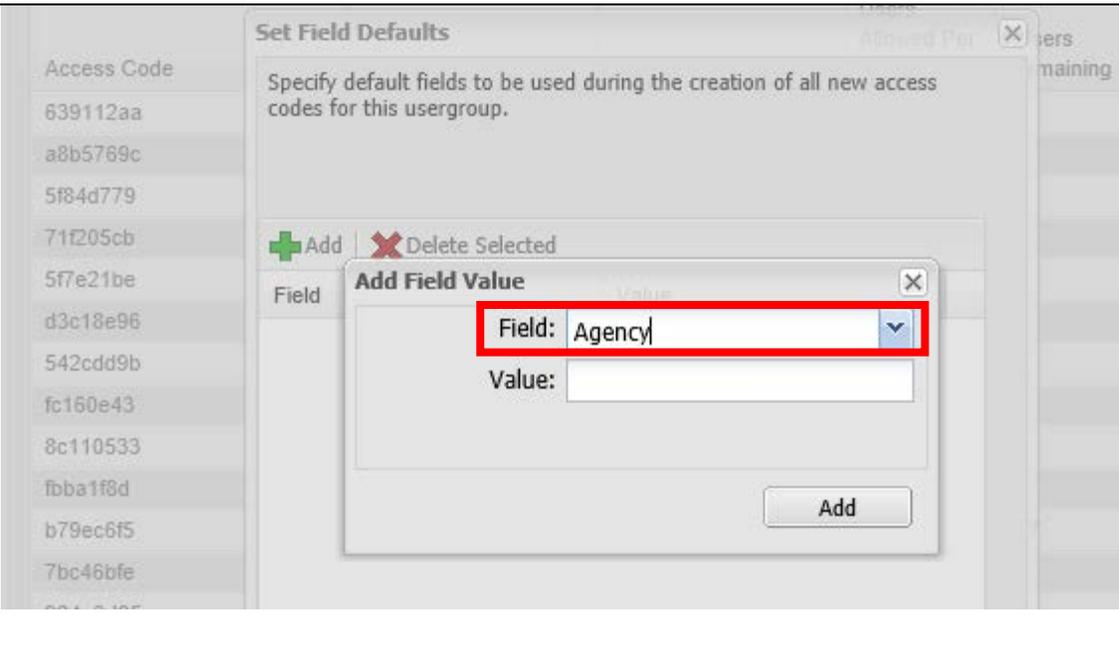# Standard Operating Procedure

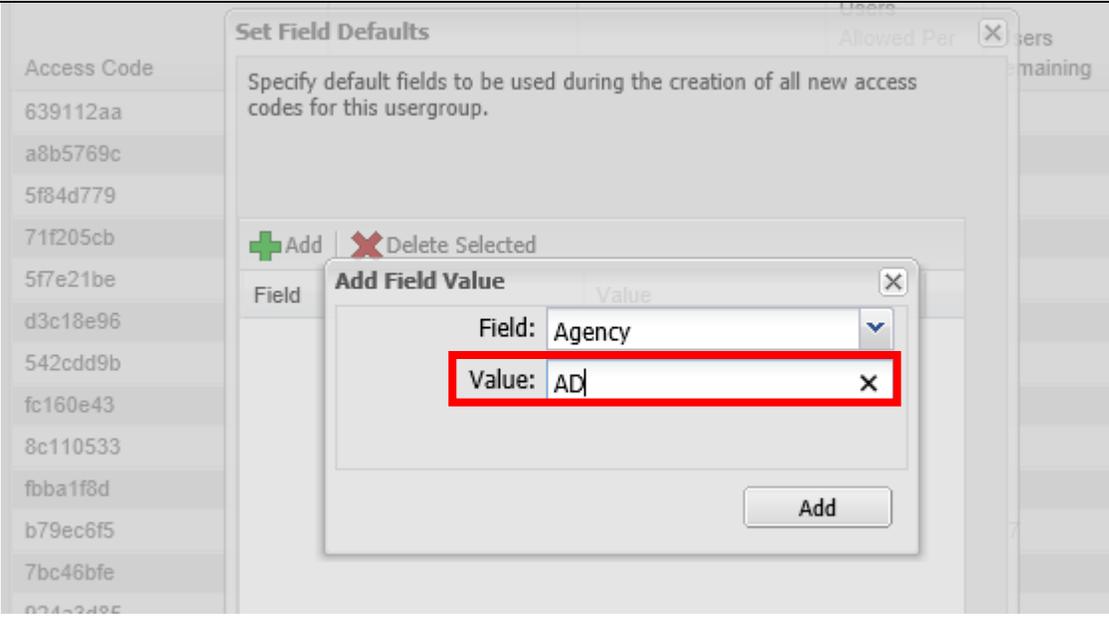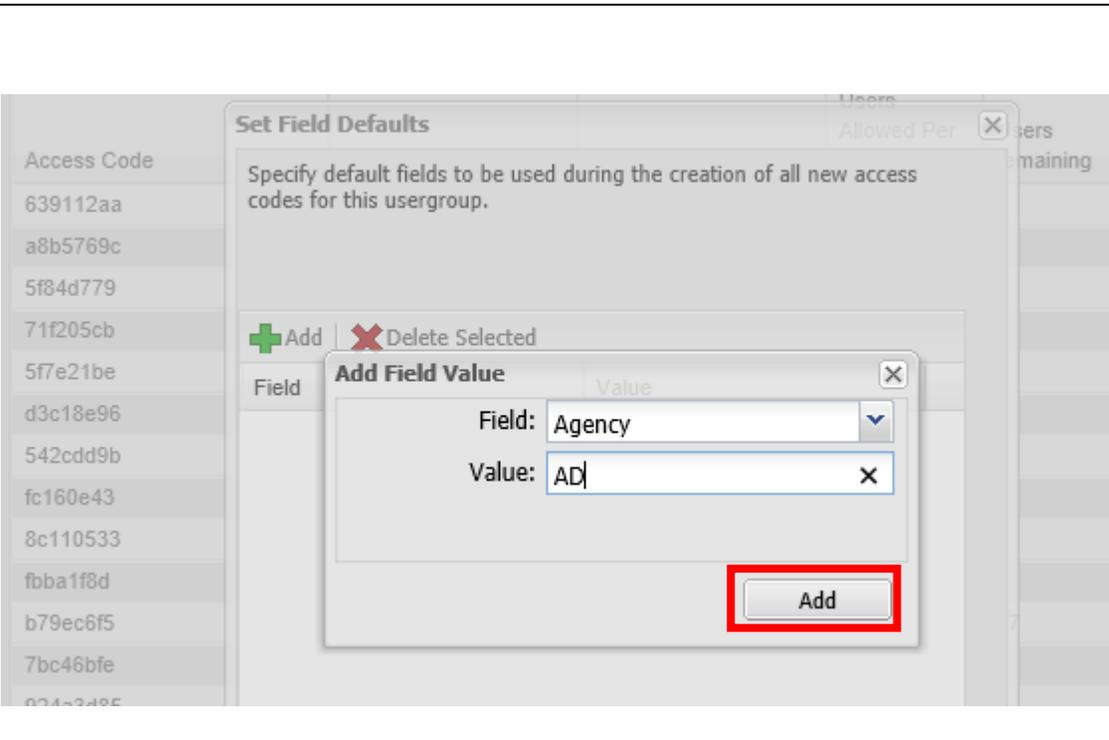| Process:	**Creating Access Codes for User Groups in the Non-State Workers Portal (e.g., contractors, volunteers, interns)**		
Purpose:	This SOP will show you how to create access codes for your agency's non-state workers. The access codes will be required for them to create their new user accounts.		
Owner:	Arizona Learning & Development	Date:	9/29/2017
		Revision:	1.0

Notes	Action	Action Detail	Screenshot
	1 **Log in to TraCorp.**	Enter your UGA username and password and click **Log In**.	
	2 **Select the User Groups button in the Admin Navigation panel.**	Click the **User Groups** button in the Admin Navigation panel. The User Groups tab appears, along with a list of available user groups.	

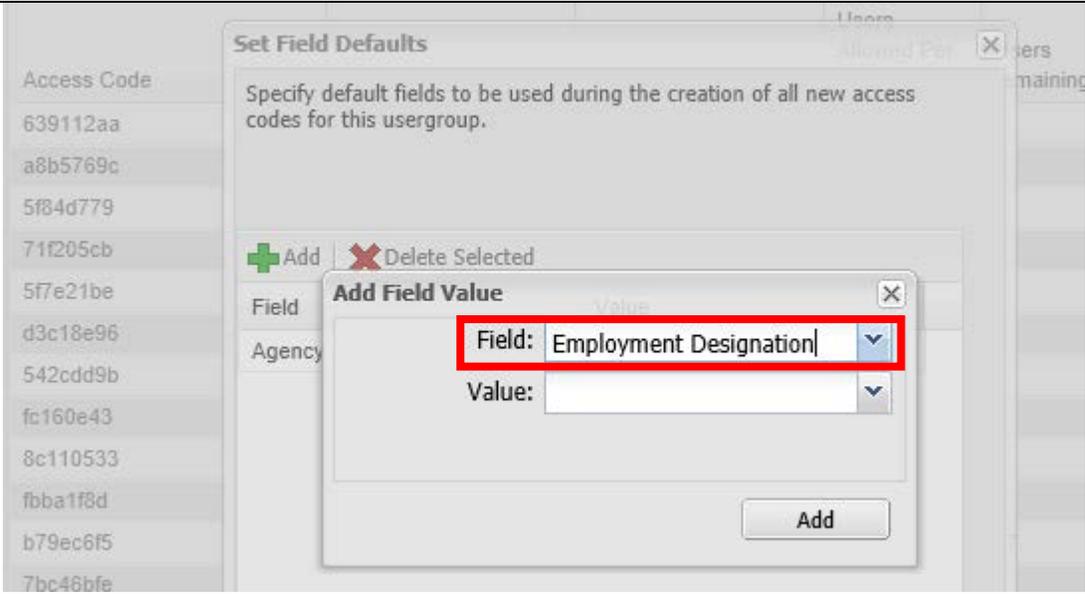|				
Note: If a specific user group does not exist, create one.	3	**In the Non-State Workers user group, select the user group for the workers for which you wish to create access codes (e.g., contractors, interns, volunteers, etc.)**	3.1 Expand the Non-State Workers user group for your agency (e.g., AD - Non- State Workers). 3.2 **Double-click** on the desired user group (e.g., AD – Agency Contract Workers). The Edit User Group window appears.	

	4	**Select the Access Codes tab.**	4.1 Use the right facing scroll arrow to the right of the tabs to scroll to the **Access Codes** tab. 4.2 Click on the Access Codes tab. The Access Codes window appears, with instructions.	Edit User Group - 1089305 ...
	5	**Select Set Field Defaults to specify default fields to be used during the creation of all new access codes for this specific user group.**	Click on Set Field Defaults button. The Set Fields dialog box will appear.	Edit User Group - 1089305 ...

Row 4 screenshot:

Edit User Group - 1089305

...igned Certifications | Autoassignment Rules | Accessibility Restrictions | Emails | **Access Codes** | Change Log

Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.

Note: any changes you make on this panel will be saved immediately.

Add | Delete Selected | Export to Spreadsheet | Set Field Defaults

Access Code	Effective Date	Expiration Date	Users Allowed Per Code	Users remaining
639112aa	10/4/2017	10/31/2017	1	0
a8b5769c	10/4/2017	10/31/2017	1	1

Row 5 screenshot:

Edit User Group - 1089305

...igned Certifications | Autoassignment Rules | Accessibility Restrictions | Emails | **Access Codes** | Change Log

Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.

Note: any changes you make on this panel will be saved immediately.

Add | Delete Selected | Export to Spreadsheet | Set Field Defaults

Access Code	Effective Date	Expiration Date	Users Allowed Per Code	Users remaining
639112aa	10/4/2017	10/31/2017	1	0
a8b5769c	10/4/2017	10/31/2017	1	1

| | 6 | **Select the Add button to add a field default for agency.** | In the Set Field Defaults dialog box, click the Add button. The Add Field Value dialog box appears. | |
| | 7 | **Select Agency in the Field drop-down box.** | Click on the down arrow to open the **Field** drop-down box and select **Agency**. | |

|	8	In the Value field, enter the agency for which you want to create access codes.	Enter the first two letters of your agency HRIS code.	
	9	Select the Add button to add the Agency field value.	Click the Add button. A line appears showing "Agency" for the Field and the agency that was added for the value, e.g., AD – see screen shot next page.	

	10	**Select the Add button again.**	Click on the "+" Add button. Again, the Add Field Value dialog box appears.	

	11	**Select Employment Designation in the Field drop-down box.**	Click on the Field drop-down box and select Employment Designation.	
	12	**Select the value that matches the user group for which you are creating the access code.**	Click on the Value drop-down box, then select the value based on the user group. For example, click on Contractor if the user group is contractors (or volunteers, interns, etc.).	
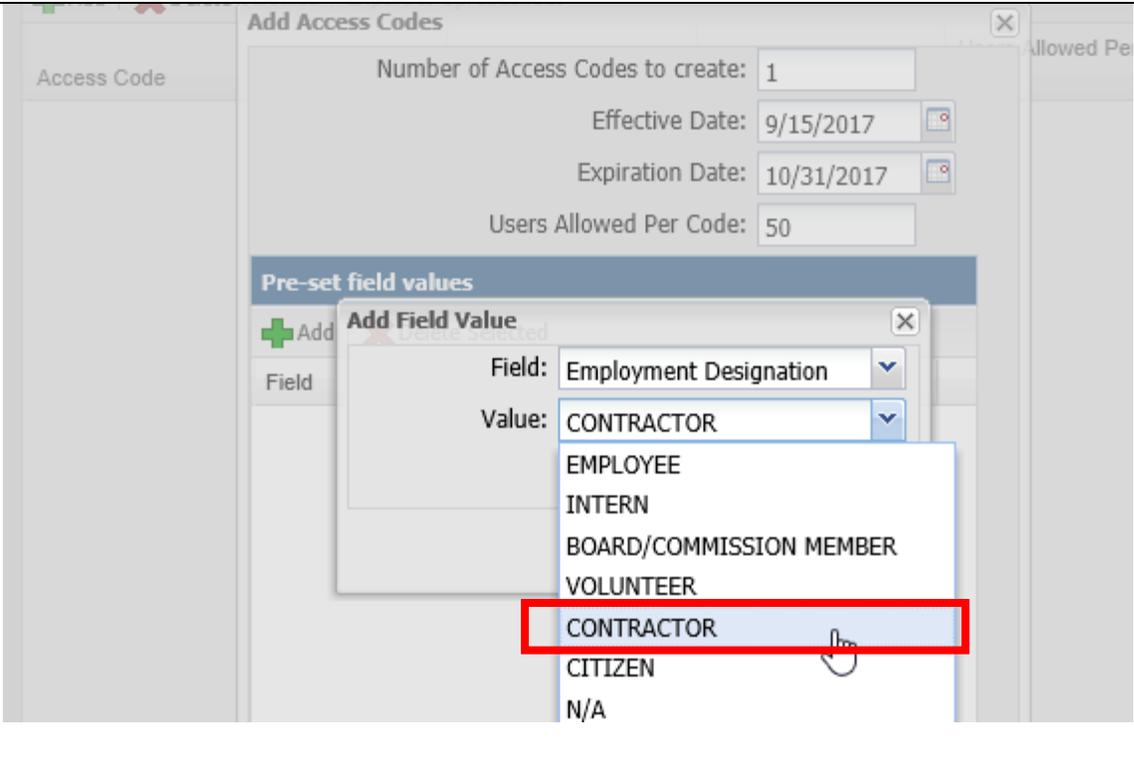
| 13 | **Select the Add button to add the Agency field value.** | Click the Add button. A line will appear showing "Employment Designation" as the Field and Contractor as the Value (see screen shot below right). | |
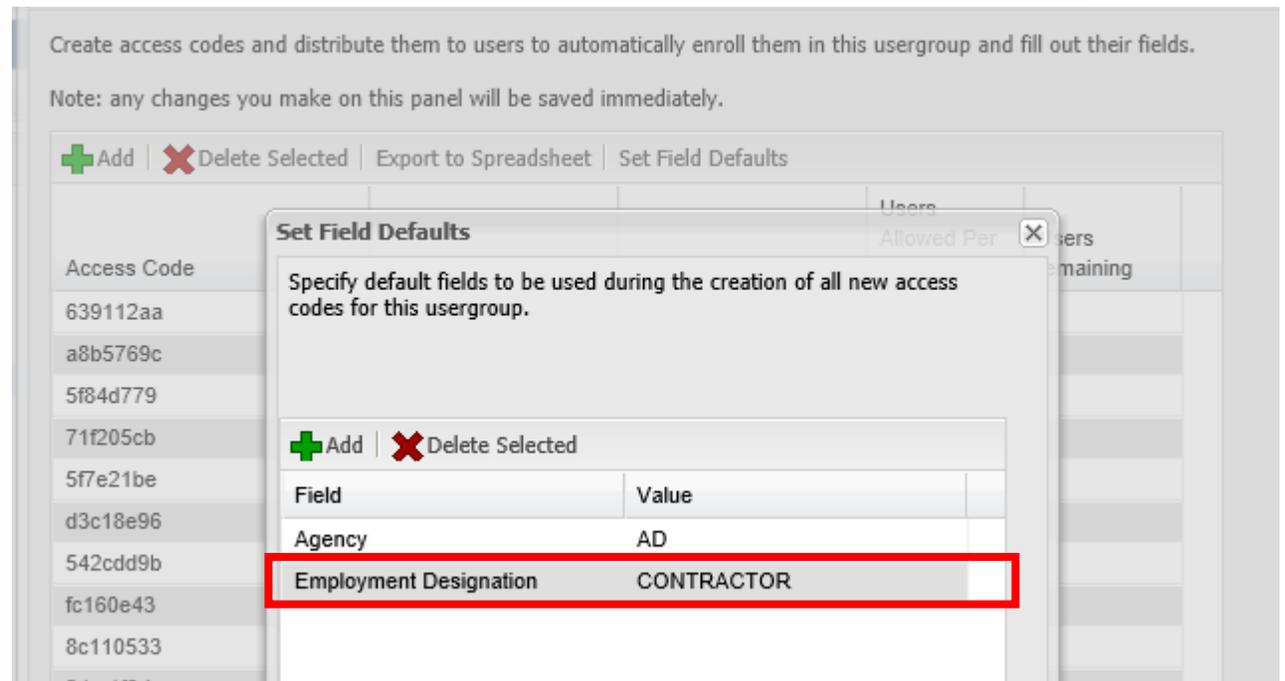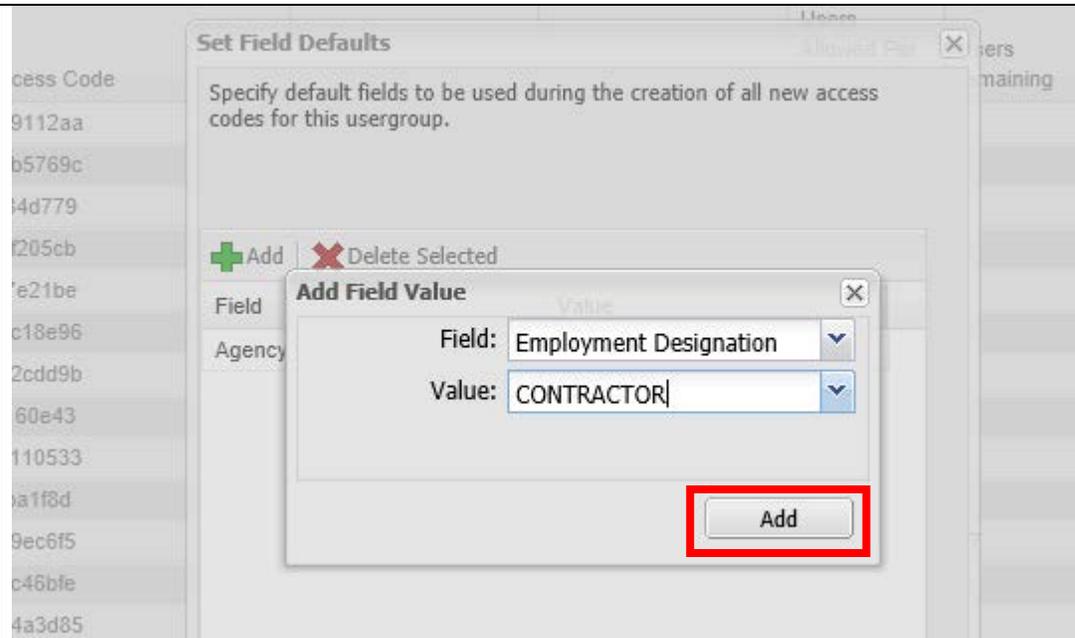
	14	**Select Save to save the new field defaults.**	Click Save. Now your default settings for this user group are set for all future access codes.	
	15	**Select the Add button to add your access code(s).**	Click on the "+" Add button. The Add Access Codes dialog box appears.	
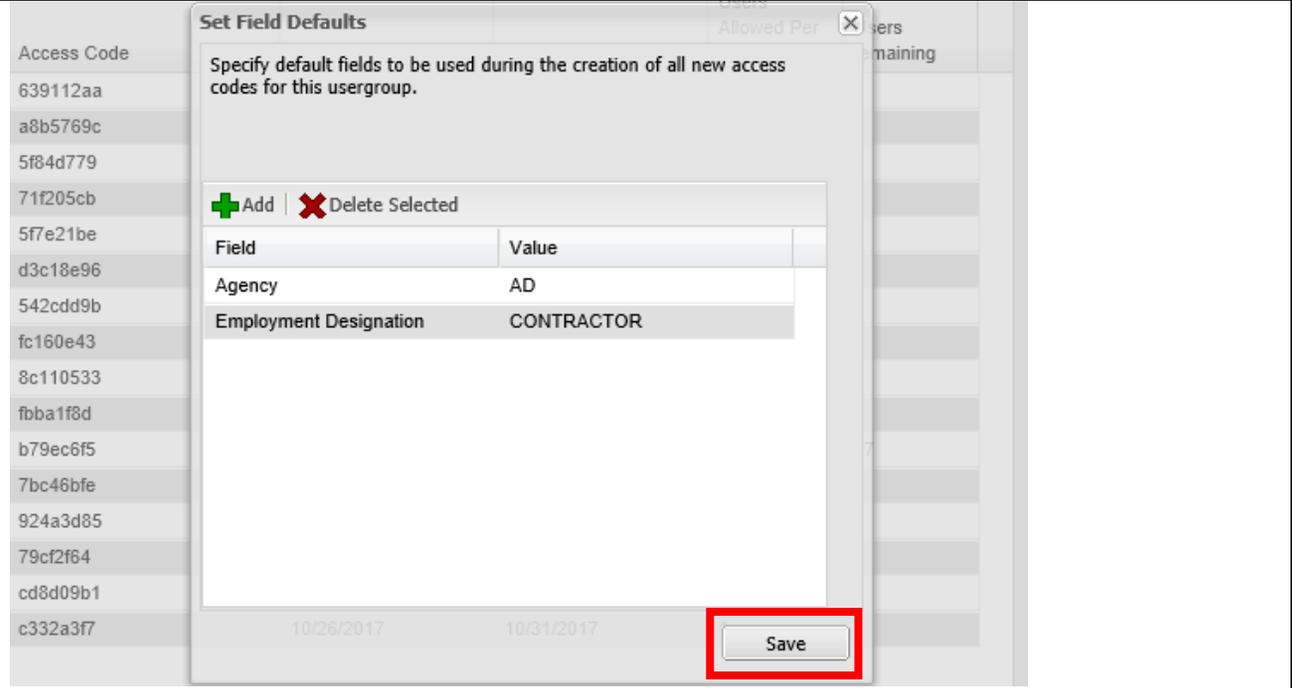
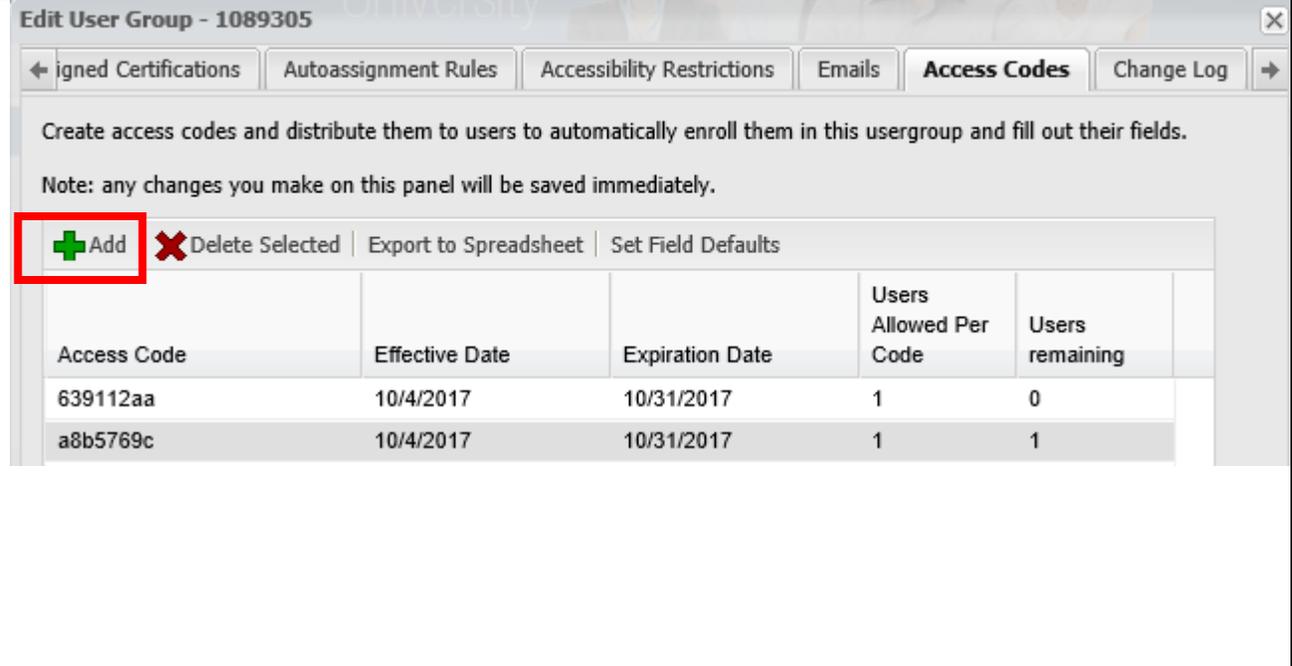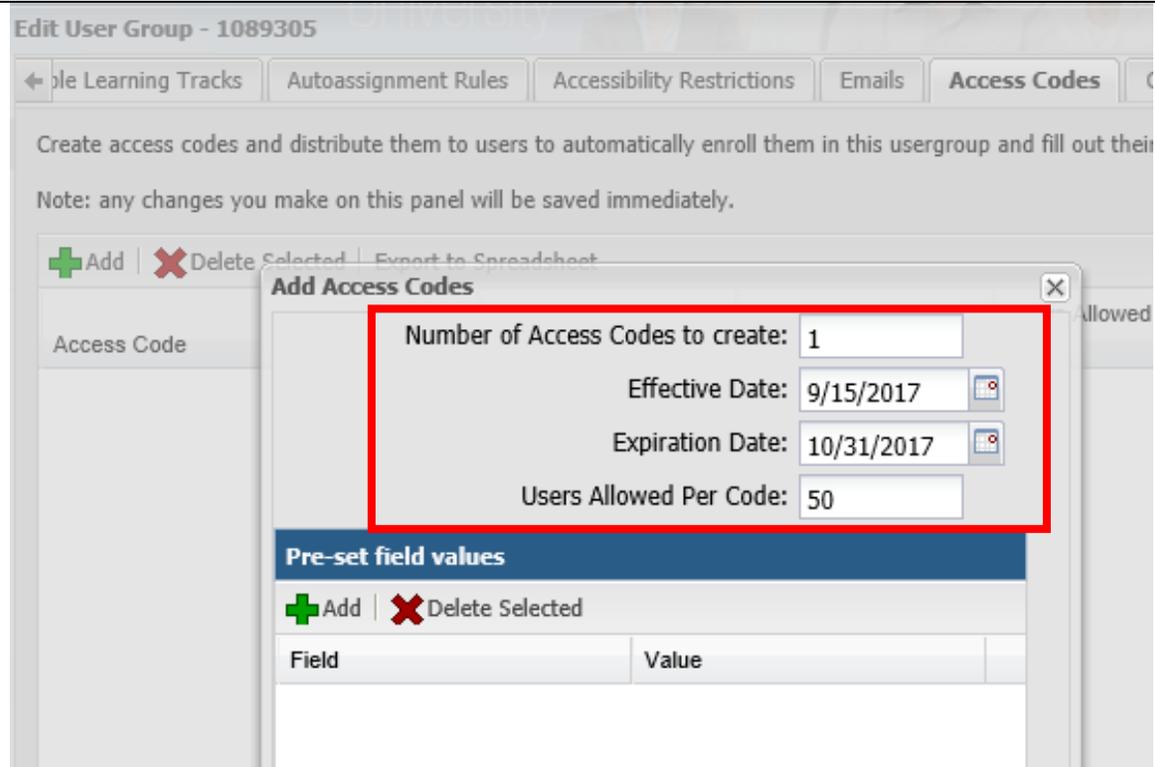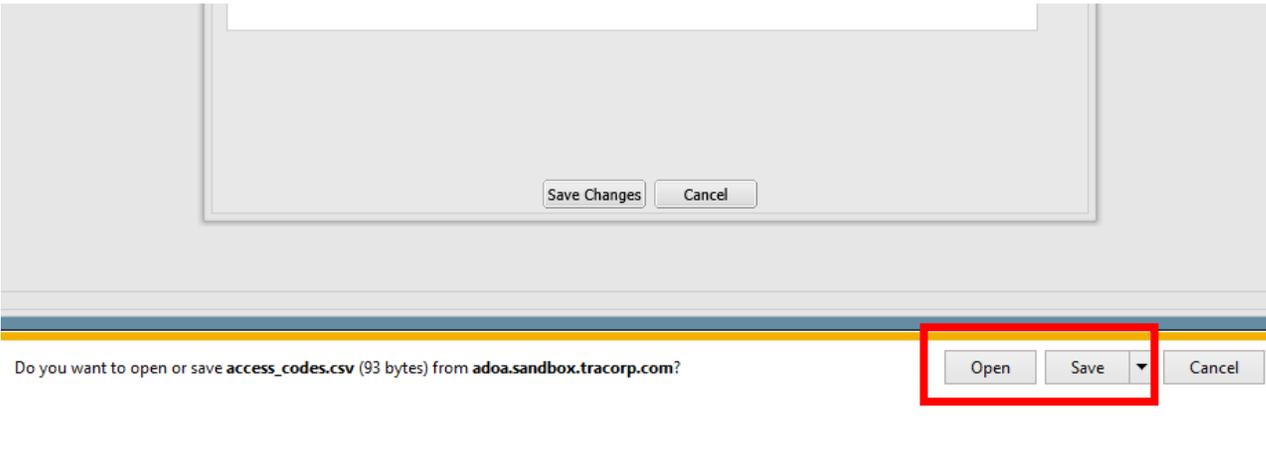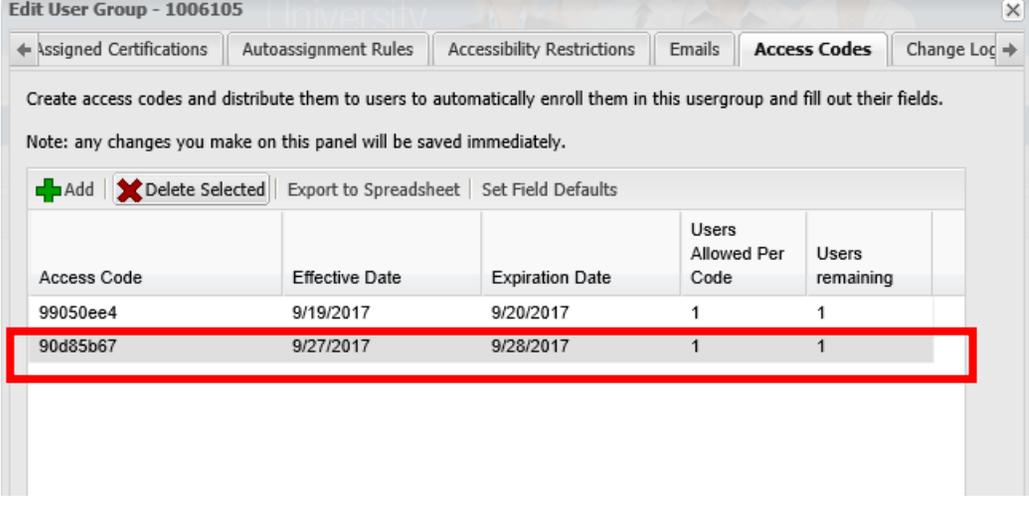|	16	Complete the fields in the Add Access Codes dialog box.	16.1 Enter a value for **the Number of Access Codes to create**. 16.2 Enter (or select using the Calendar) the **Effective Date** on which users can begin to use the Access Code. 16.3 Enter (or select using the Calendar) **Expiration Date** for the Access Code. Highly recommend for six months to a year. 16.4 Enter a value for **Users Allowed Per Code**.	
NOTE: Best practice is to only create 1 access code at a time and to allow no more than 100 users for that code.				

Edit User Group - 1089305

ple Learning Tracks | Autoassignment Rules | Accessibility Restrictions | Emails | **Access Codes**

Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their

Note: any changes you make on this panel will be saved immediately.

Add | Delete Selected | Export to Spreadsheet

Add Access Codes

Access Code

Number of Access Codes to create: 1

Effective Date: 9/15/2017

Expiration Date: 10/31/2017

Users Allowed Per Code: 50

Pre-set field values

Add | Delete Selected

Field	Value

	17	Select Save to save the new access codes.	Click Save. A message appears: "Access Codes Created," followed by the question, "Would you like to download a file containing them?"	
	18	Click Yes or No in the Access Codes Created message box.	Click Yes if you want to download the access codes in an Excel file; click No if not. In either case, your new access code(s) will appear in the Edit User Group window.	
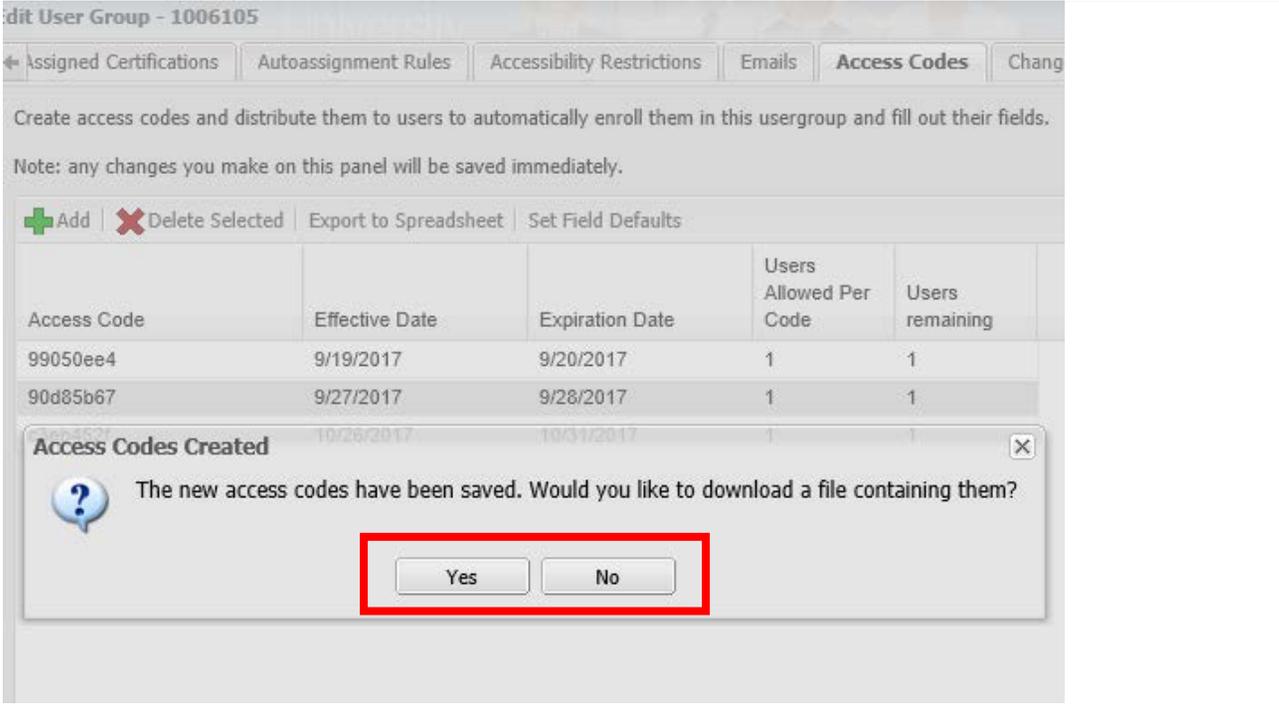
	19	**If you click Yes, either open or save the Excel file.**	Click Open or Save in the Windows pop-up to open or save the Excel file with your access codes.	 Do you want to open or save **access_codes.csv** (93 bytes) from **adoa.sandbox.tracorp.com**? [Open] [Save ▼] [Cancel]
	20	**Review and record your new access code(s) for later distribution and usage (along with the effective date and expiration date).**	Write down your access code(s) for future distribution and easy access.	

21	**Select Save Changes.**	Click Save Changes. The new access code will be saved in the appropriate user group if you wish to retrieve them later.	

Add | Delete Selected | Export to Spreadsheet | Set Field Defaults

Access Code	Effective Date	Expiration Date	Users Allowed Per Code	Users remaining
99050ee4	9/19/2017	9/20/2017	1	1
90d85b67	9/27/2017	9/28/2017	1	1

Save Changes   Cancel