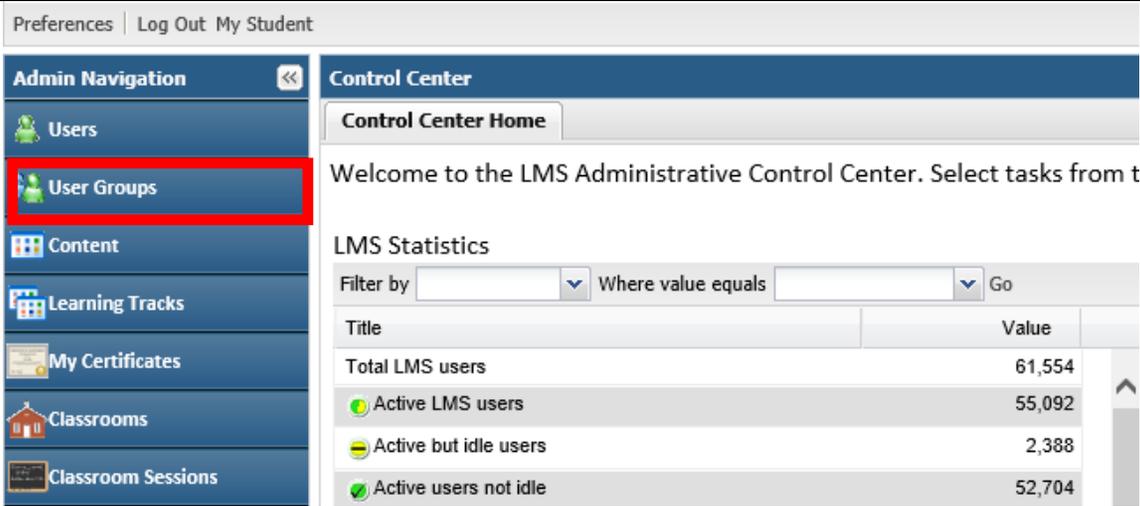
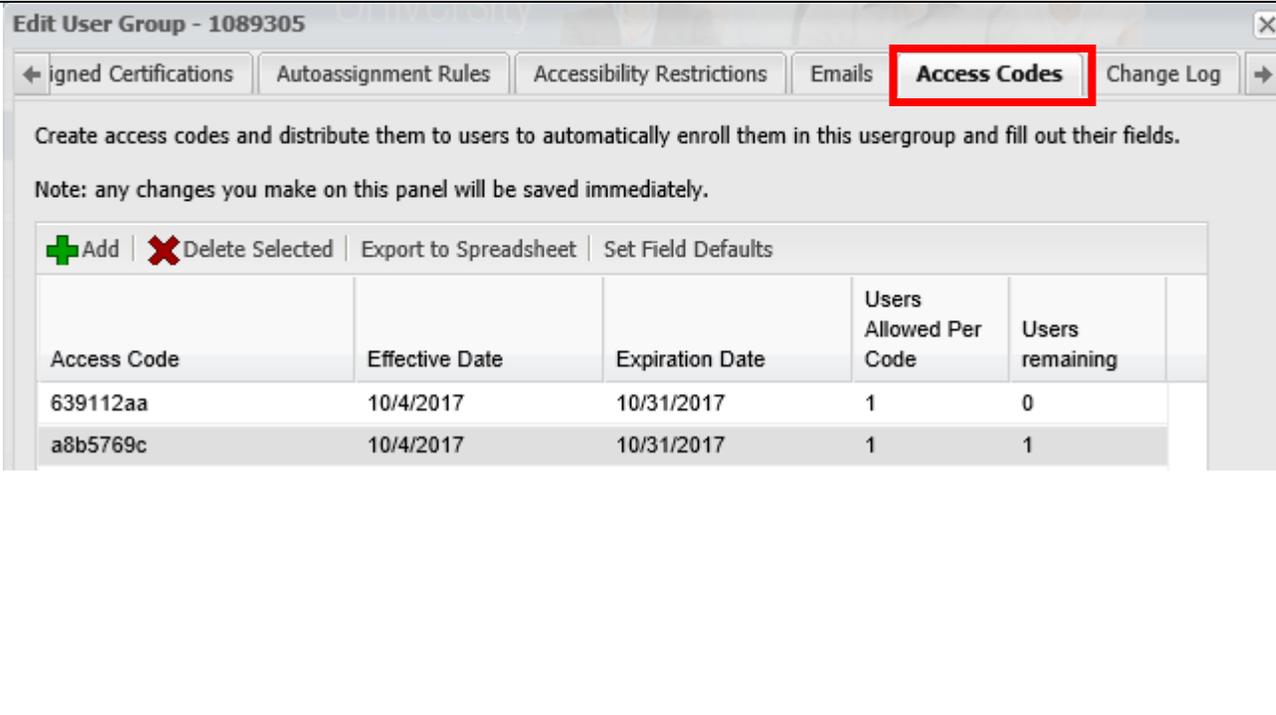
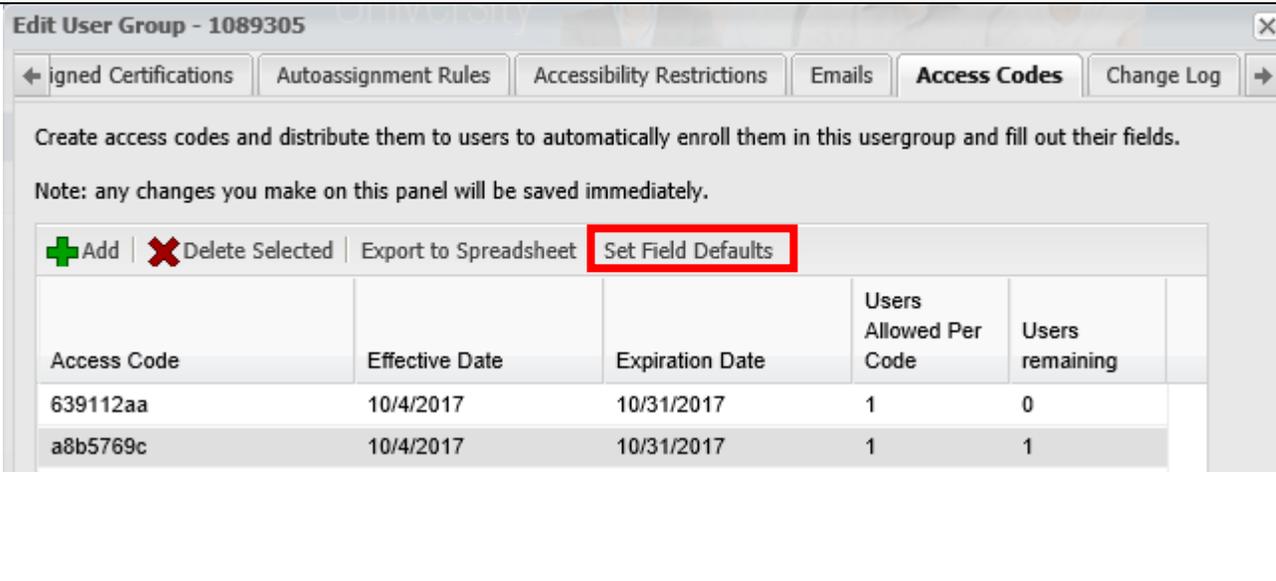


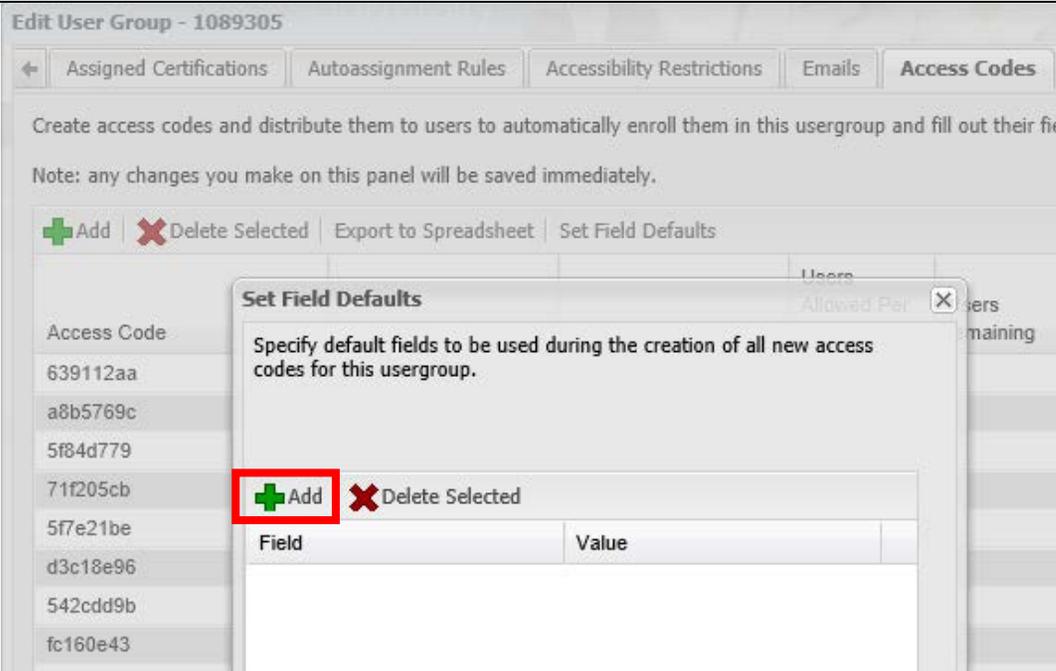
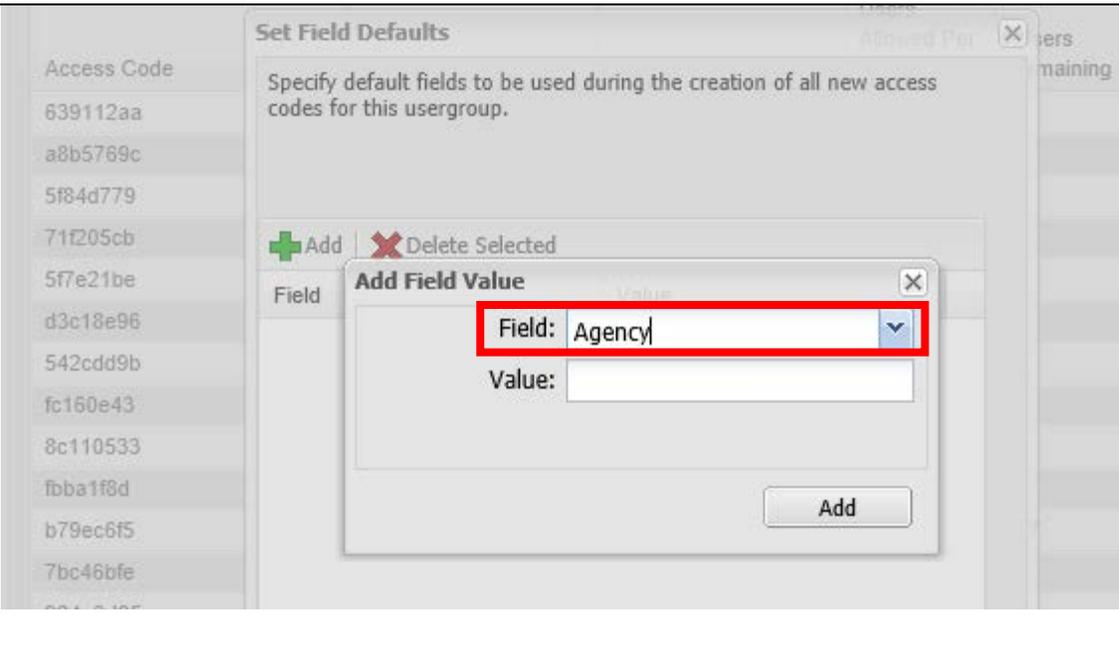
Standard Operating Procedure

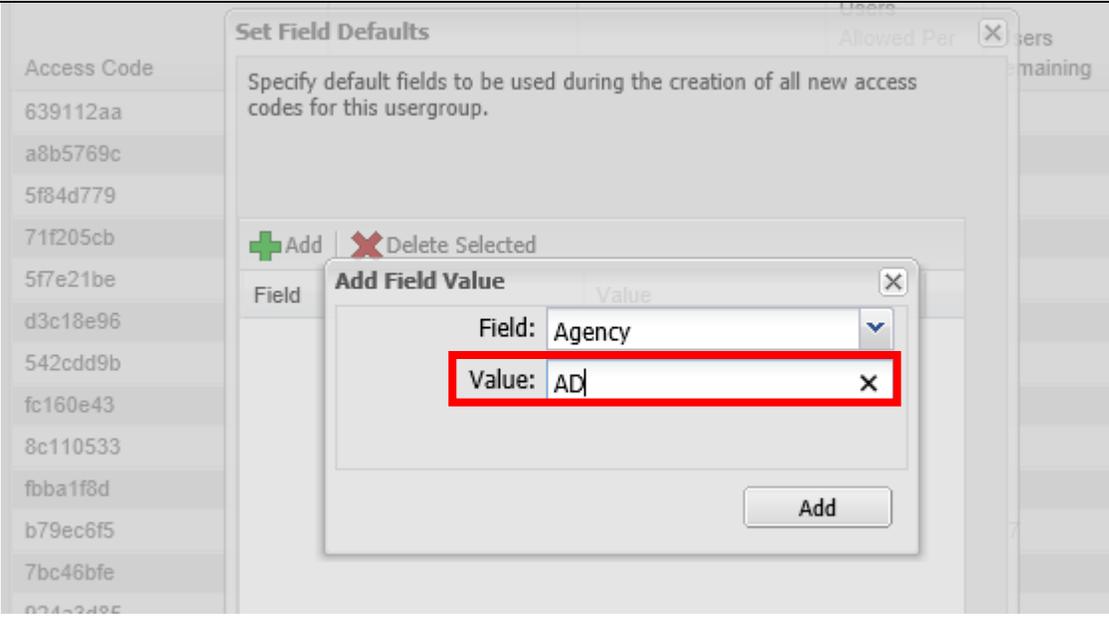
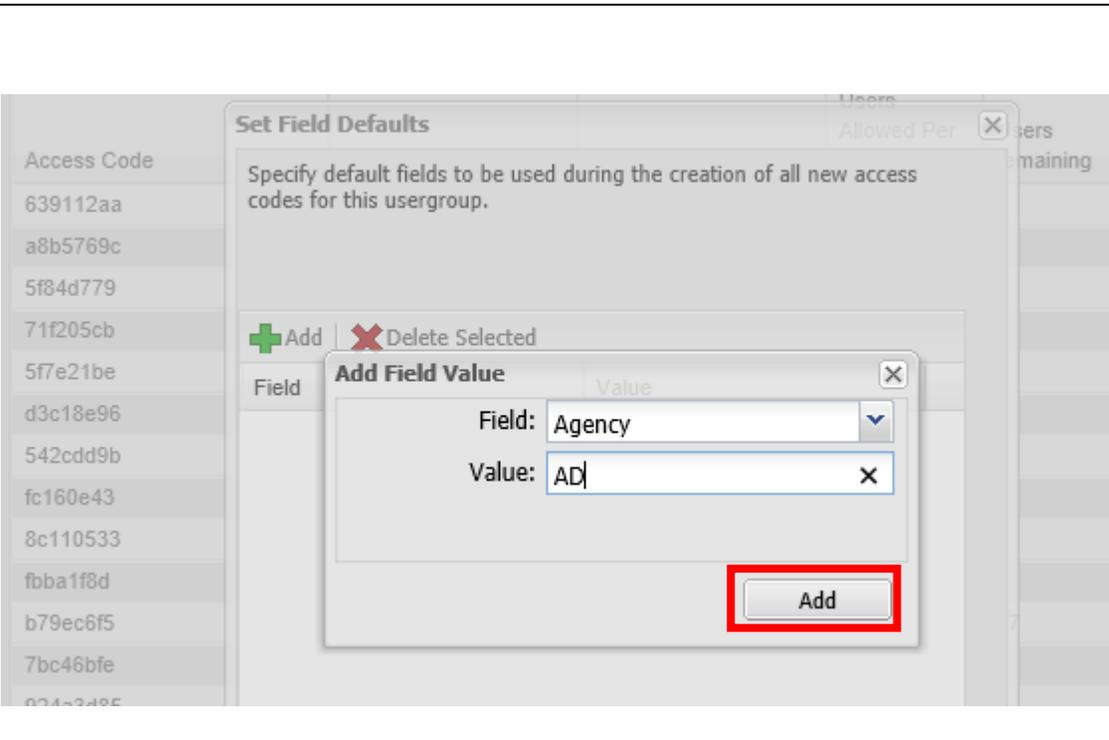
Process:	Creating Access Codes for User Groups in the Non-State Workers Portal (e.g., contractors, volunteers, interns)		
Purpose:	This SOP will show you how to create access codes for your agency's non-state workers. The access codes will be required for them to create their new user accounts.		
Owner:	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.	 <table border="1" style="margin-top: 10px;"> <caption>LMS Statistics</caption> <thead> <tr> <th>Title</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Total LMS users</td> <td>61,554</td> </tr> <tr> <td>Active LMS users</td> <td>55,092</td> </tr> <tr> <td>Active but idle users</td> <td>2,388</td> </tr> <tr> <td>Active users not idle</td> <td>52,704</td> </tr> </tbody> </table>	Title	Value	Total LMS users	61,554	Active LMS users	55,092	Active but idle users	2,388	Active users not idle	52,704
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Total LMS users	61,554												
Active LMS users	55,092												
Active but idle users	2,388												
Active users not idle	52,704												

<p>Note: If a specific user group does not exist, create one.</p>	<p>3</p>	<p>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.)</p>	<p>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.</p>	<p>The screenshot shows the 'Control Center' interface with the 'User Groups' tab selected. A list of user groups is displayed, including 'AD - Administration (15)', 'AD - Supervisors (0)', 'ASET (0)', 'Benefits (0)', 'Contractors (0)', 'Director's Office (0)', 'G-Sutie Champions Group (0)', 'GAO (0)', 'GSD (0)', 'Human Resources (0)', 'New Employees (0)', 'New Supervisors (0)', 'Non-State Employee Board Members (0)', 'Non-Supervising Employees (0)', 'Risk Management (0)', 'State Procurement (0)', 'AD - Non-State Workers (4)', 'Agency Boards and Commissions Members (0)', 'Agency Contract Workers (0)', 'Agency Interns (0)', and 'Agency Volunteers (0)'. The 'AD - Non-State Workers (4)' and 'Agency Contract Workers (0)' items are highlighted with red boxes. A red arrow points to the 'Agency Contract Workers (0)' item.</p>
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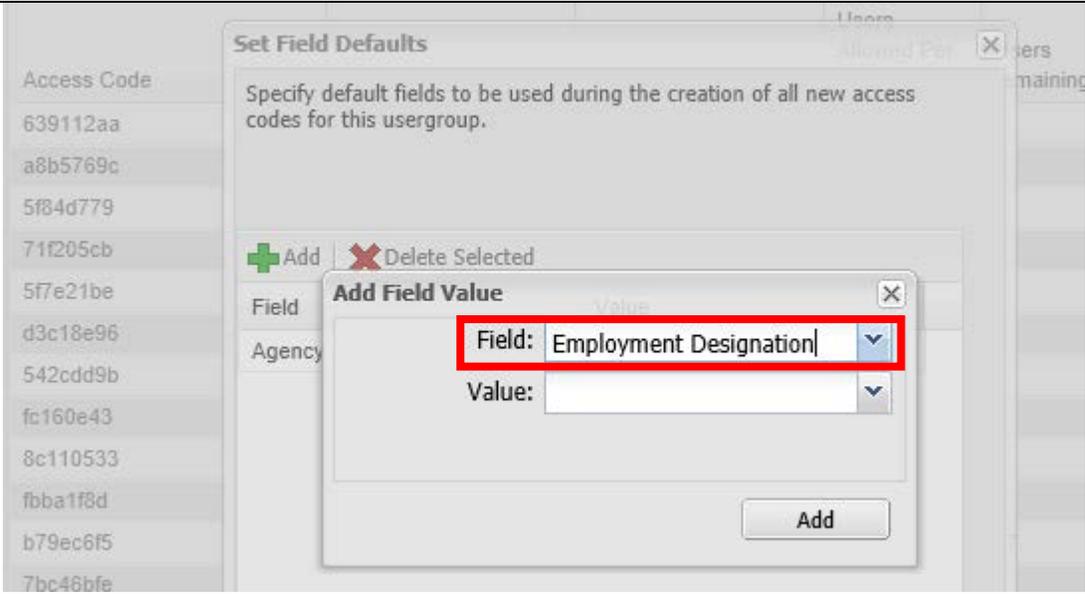
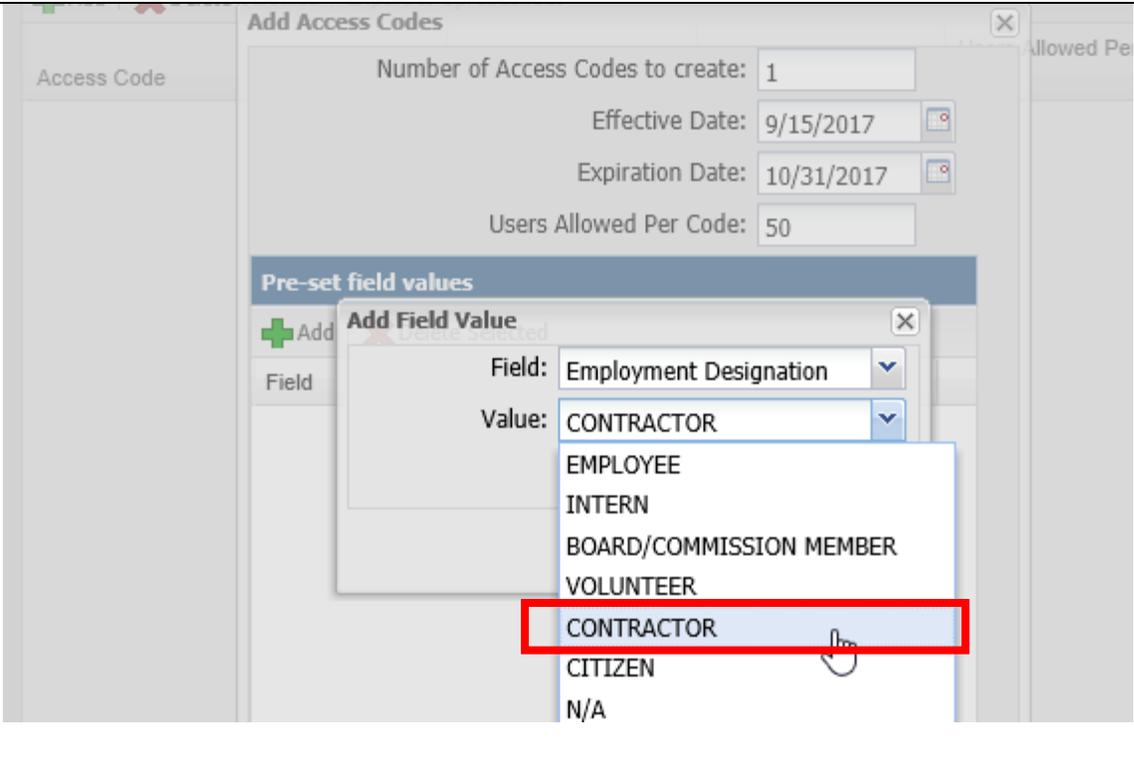
4	<p>Select the Access Codes tab.</p>	<p>4.1 Use the right facing scroll arrow to the right of the tabs to scroll to the Access Codes tab.</p> <p>4.2 Click on the Access Codes tab. The Access Codes window appears, with instructions.</p>	 <p>Edit User Group - 1089305</p> <p>← Ignored Certifications Autoassignment Rules Accessibility Restrictions Emails Access Codes Change Log →</p> <p>Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.</p> <p>Note: any changes you make on this panel will be saved immediately.</p> <p>+ Add ✗ Delete Selected Export to Spreadsheet Set Field Defaults</p> <table border="1"> <thead> <tr> <th>Access Code</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Users Allowed Per Code</th> <th>Users remaining</th> </tr> </thead> <tbody> <tr> <td>639112aa</td> <td>10/4/2017</td> <td>10/31/2017</td> <td>1</td> <td>0</td> </tr> <tr> <td>a8b5769c</td> <td>10/4/2017</td> <td>10/31/2017</td> <td>1</td> <td>1</td> </tr> </tbody> </table>	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
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5	<p>Select Set Field Defaults to specify default fields to be used during the creation of all new access codes for this specific user group.</p>	<p>Click on Set Field Defaults button. The Set Fields dialog box will appear.</p>	 <p>Edit User Group - 1089305</p> <p>← Ignored Certifications Autoassignment Rules Accessibility Restrictions Emails Access Codes Change Log →</p> <p>Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.</p> <p>Note: any changes you make on this panel will be saved immediately.</p> <p>+ Add ✗ Delete Selected Export to Spreadsheet Set Field Defaults</p> <table border="1"> <thead> <tr> <th>Access Code</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Users Allowed Per Code</th> <th>Users remaining</th> </tr> </thead> <tbody> <tr> <td>639112aa</td> <td>10/4/2017</td> <td>10/31/2017</td> <td>1</td> <td>0</td> </tr> <tr> <td>a8b5769c</td> <td>10/4/2017</td> <td>10/31/2017</td> <td>1</td> <td>1</td> </tr> </tbody> </table>	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
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6	<p>Select the Add button to add a field default for agency.</p>	<p>In the Set Field Defaults dialog box, click the Add button. The Add Field Value dialog box appears.</p>	 <p>The screenshot shows the 'Set Field Defaults' dialog box overlaid on the 'Edit User Group - 1089305' page. The dialog box contains a list of access codes and a table with 'Field' and 'Value' columns. A red box highlights the '+ Add' button.</p>
7	<p>Select Agency in the Field drop-down box.</p>	<p>Click on the down arrow to open the Field drop-down box and select Agency.</p>	 <p>The screenshot shows the 'Add Field Value' dialog box overlaid on the 'Set Field Defaults' dialog box. The 'Field' dropdown menu is highlighted in red, and 'Agency' is selected. The 'Value' field is empty.</p>

8	<p>In the Value field, enter the agency for which you want to create access codes.</p>	<p>Enter the first two letters of your agency HRIS code.</p>	
9	<p>Select the Add button to add the Agency field value.</p>	<p>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.</p>	

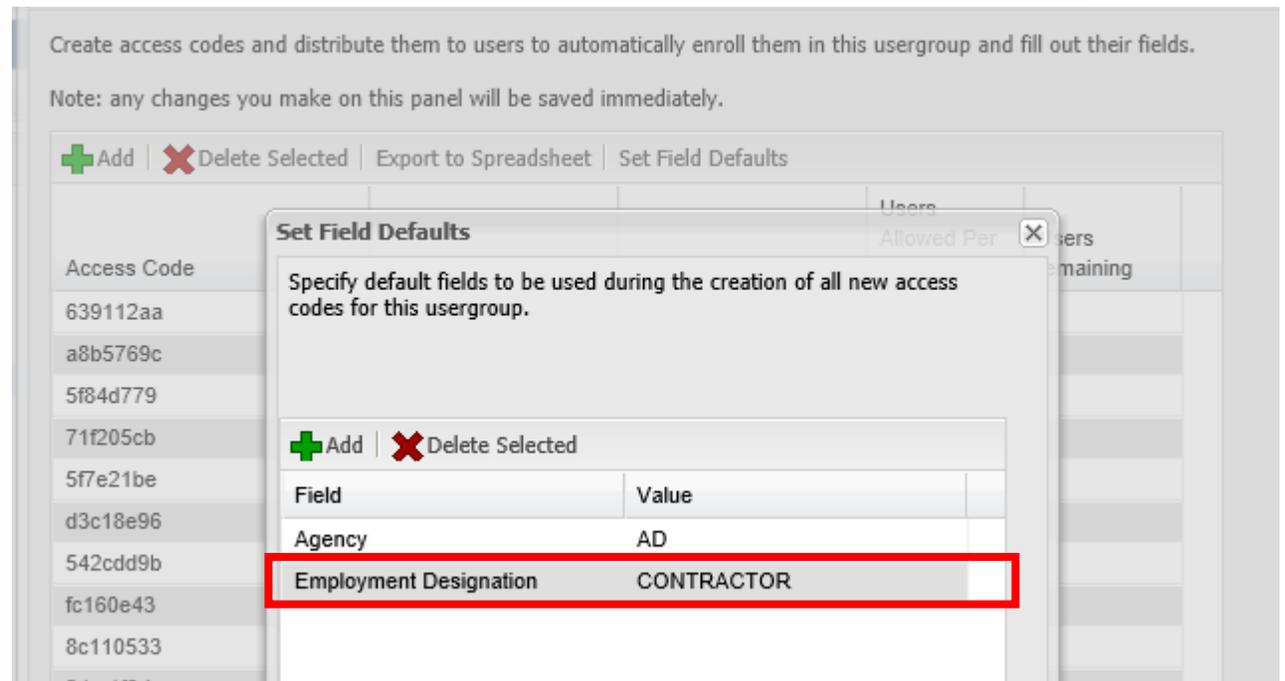
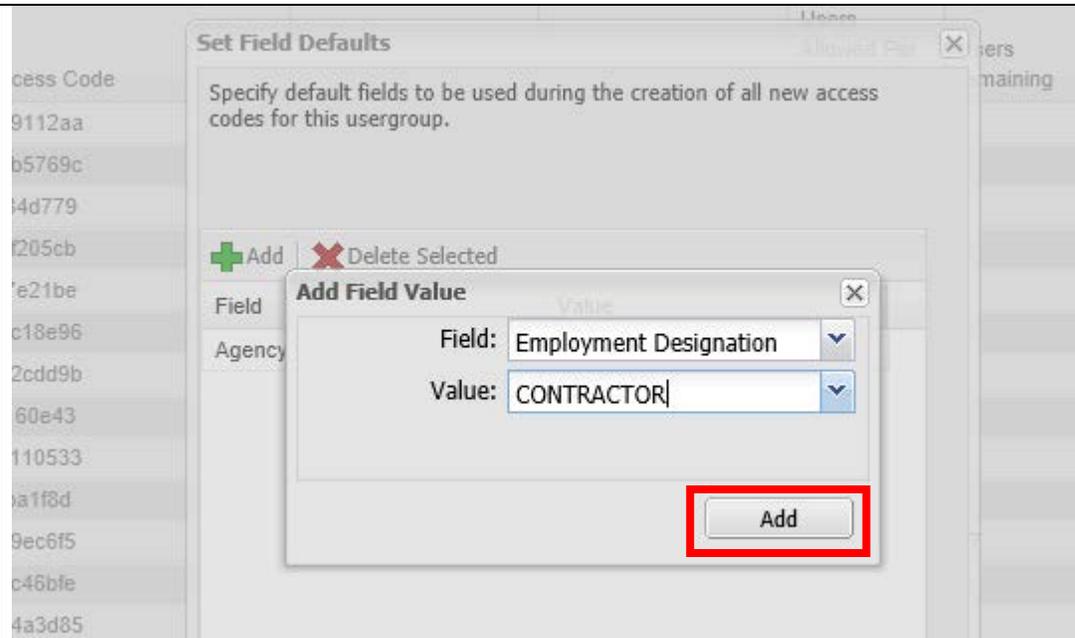
			<p>Assigned Certifications Autoassignment Rules Accessibility Restrictions Emails Access Codes</p> <p>Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.</p> <p>Note: any changes you make on this panel will be saved immediately.</p> <p>+ Add X Delete Selected Export to Spreadsheet Set Field Defaults</p> <p>Set Field Defaults</p> <p>Specify default fields to be used during the creation of all new access codes for this usergroup.</p> <p>+ Add X Delete Selected</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Agency</td> <td>AD</td> </tr> </tbody> </table>	Field	Value	Agency	AD
Field	Value						
Agency	AD						

10	<p>Select the Add button again.</p>	<p>Click on the "+" Add button. Again, the Add Field Value dialog box appears.</p>	<p>Assigned Certifications Autoassignment Rules Accessibility Restrictions Emails Access Codes</p> <p>Create access codes and distribute them to users to automatically enroll them in this usergroup and fill out their fields.</p> <p>Note: any changes you make on this panel will be saved immediately.</p> <p>+ Add X Delete Selected Export to Spreadsheet Set Field Defaults</p> <p>Set Field Defaults</p> <p>Specify default fields to be used during the creation of all new access codes for this usergroup.</p> <p>+ Add X Delete Selected</p> <table border="1"> <thead> <tr> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Agency</td> <td>AD</td> </tr> </tbody> </table>	Field	Value	Agency	AD
Field	Value						
Agency	AD						

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.).	

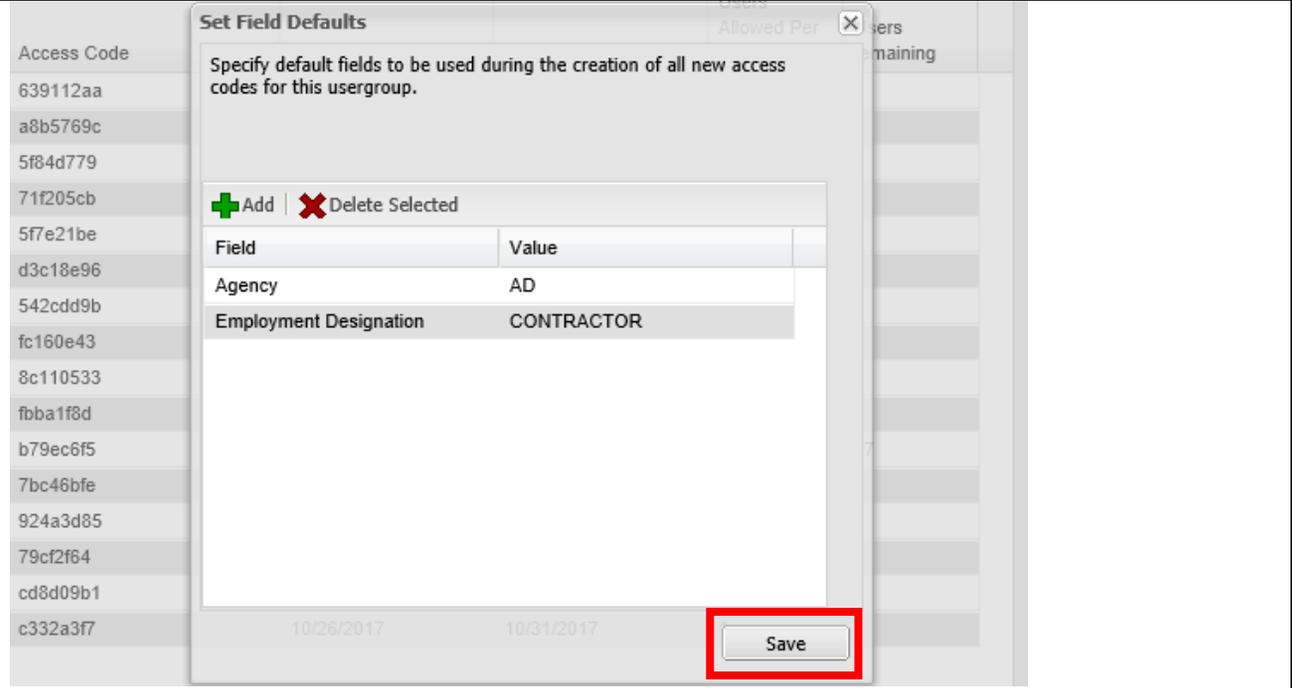
13 Select the Add button to add the Agency field value.

Click the Add button. A line will appear showing "Employment Designation" as the Field and Contractor as the Value (see screen shot below right).



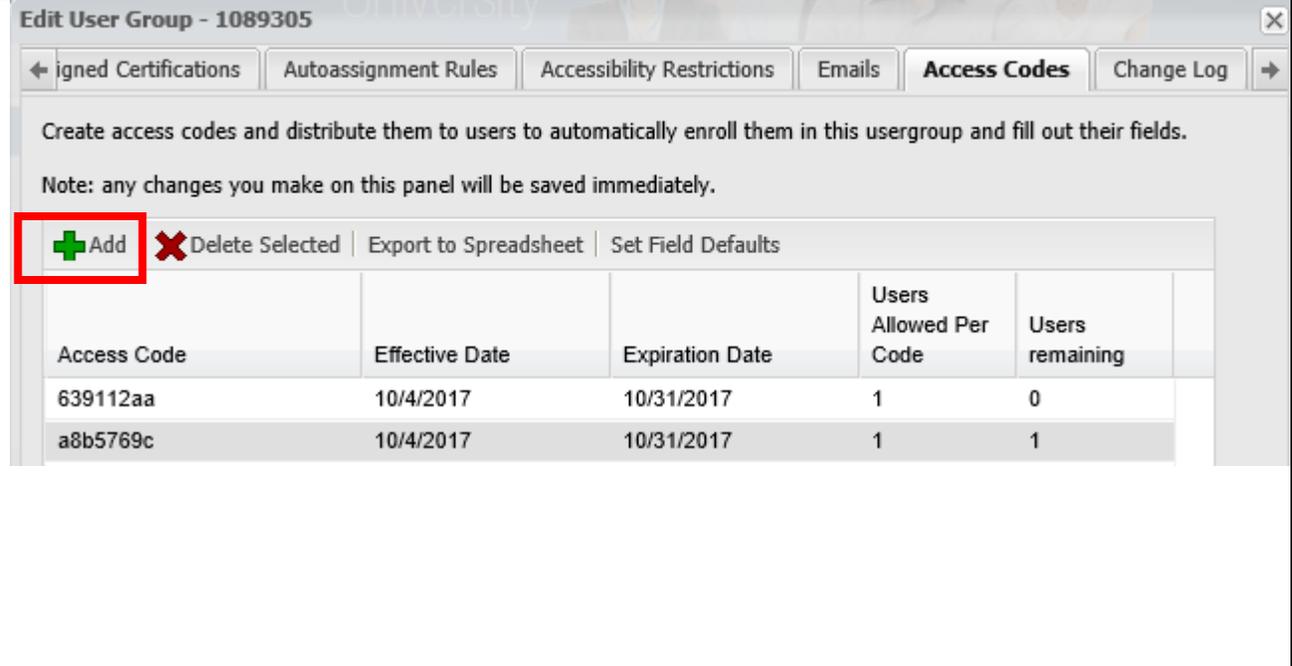
14 **Select Save to save the new field defaults.**

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).**

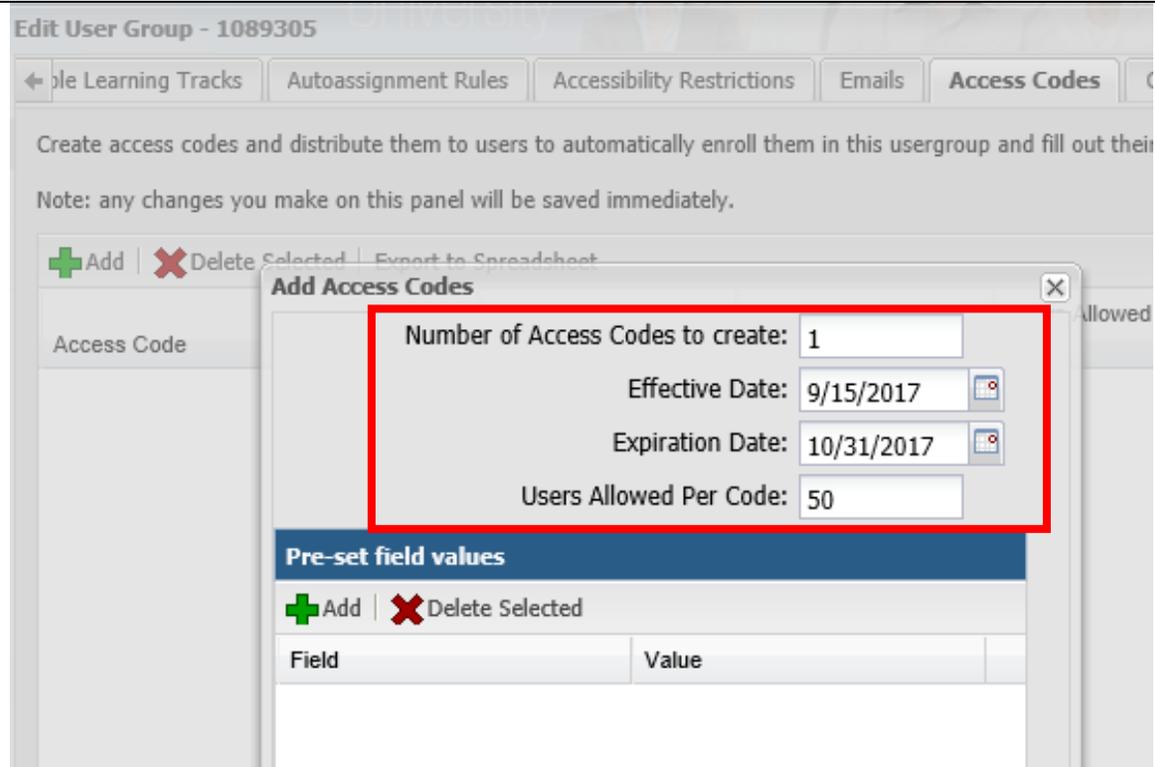
Click on the "+" Add button. The Add Access Codes dialog box appears.

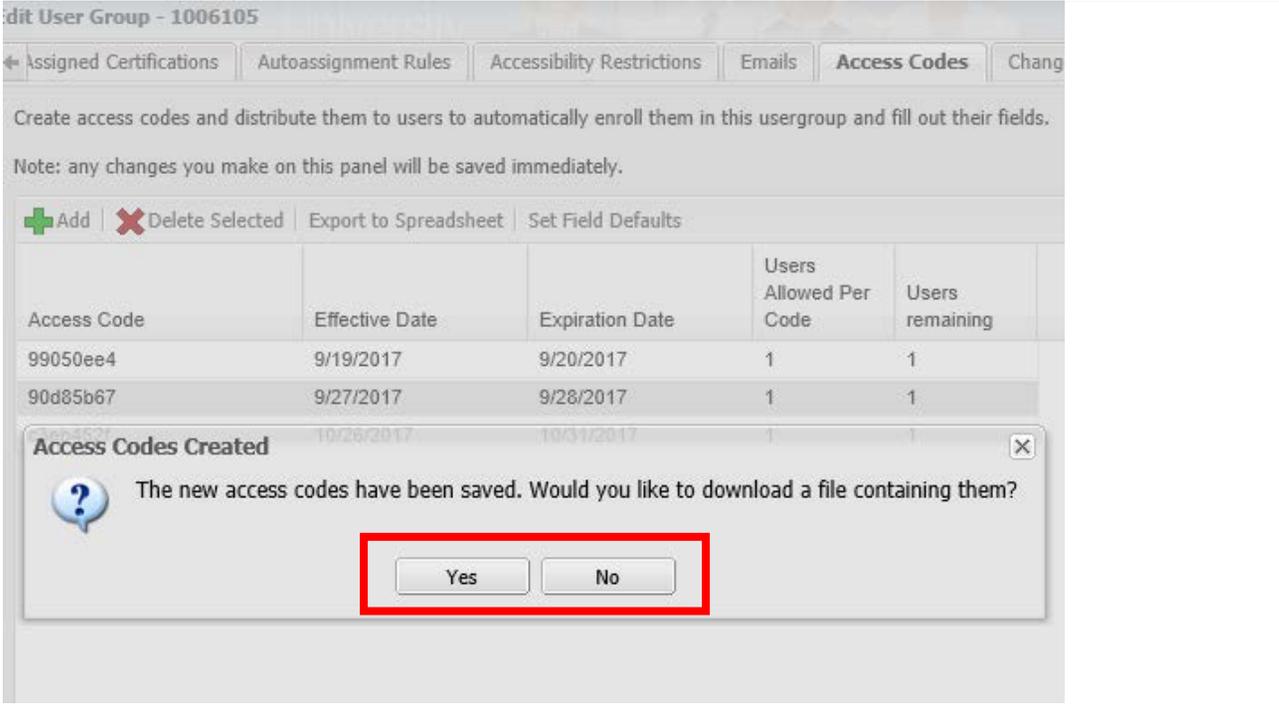


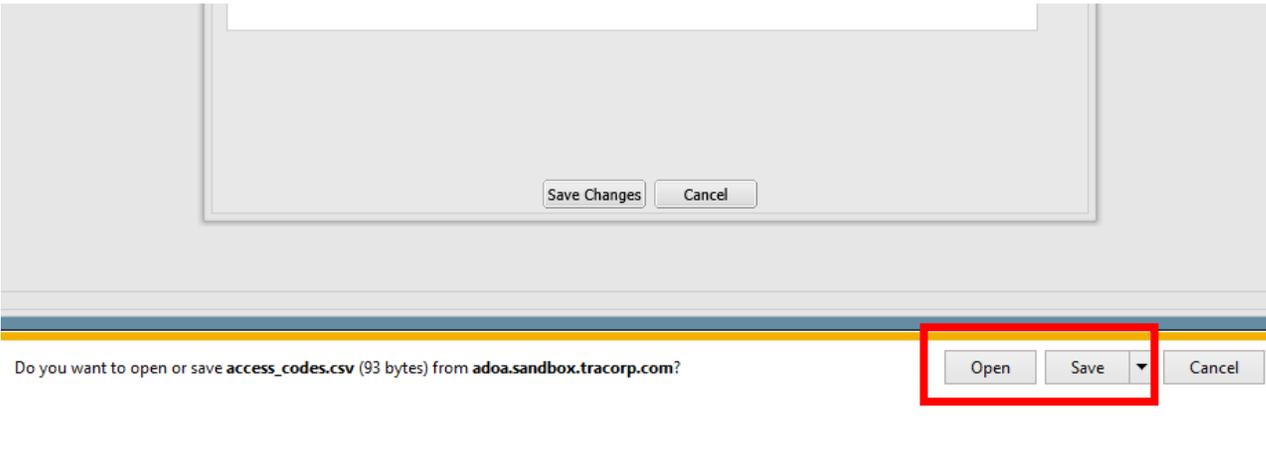
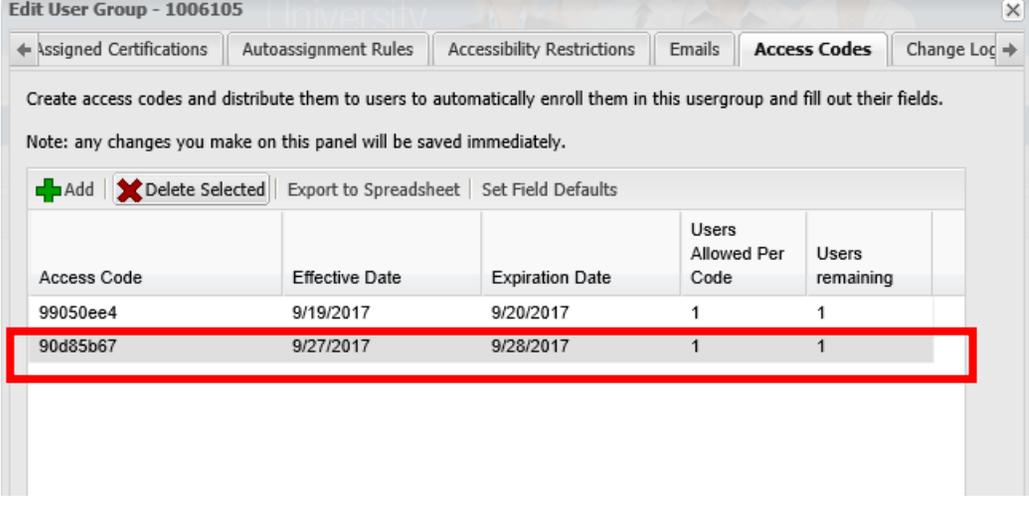
NOTE:
Best practice is to only create 1 access code at a time and to allow no more than 100 users for that code.

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**.



	17	<p>Select Save to save the new access codes.</p>	<p>Click Save. A message appears: "Access Codes Created," followed by the question, "Would you like to download a file containing them?"</p>	
<p>Note: You also have the ability to view users remaining for each access code.</p>	18	<p>Click Yes or No in the Access Codes Created message box.</p>	<p>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.</p>	

	<p>19 If you click Yes, either open or save the Excel file.</p>	<p>Click Open or Save in the Windows pop-up to open or save the Excel file with your access codes.</p>																
	<p>20 Review and record your new access code(s) for later distribution and usage (along with the effective date and expiration date).</p>	<p>Write down your access code(s) for future distribution and easy access.</p>	 <table border="1" data-bbox="739 776 1711 945"> <thead> <tr> <th>Access Code</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Users Allowed Per Code</th> <th>Users remaining</th> </tr> </thead> <tbody> <tr> <td>99050ee4</td> <td>9/19/2017</td> <td>9/20/2017</td> <td>1</td> <td>1</td> </tr> <tr style="border: 2px solid red;"> <td>90d85b67</td> <td>9/27/2017</td> <td>9/28/2017</td> <td>1</td> <td>1</td> </tr> </tbody> </table>	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
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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.

The screenshot displays a software interface with a table and a toolbar. The toolbar includes a green plus icon for 'Add', a red X icon for 'Delete Selected', and links for 'Export to Spreadsheet' and 'Set Field Defaults'. The table contains two rows of data:

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

At the bottom of the interface, there are two buttons: 'Save Changes' (highlighted with a red box) and 'Cancel'.