Virtual Test Center Console Administrator Guide

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HELP

What's New

Validus Test Registration, Administration (VTC Admin / VTC RSP / MyWorkKeys)

Release: 7.0
General Availability: Winter, 2010

Features At-A-Glance

If a corresponding help topic is available in the VTC Admin User Guide, the link provided after each will take you directly to that section.

Use the "What's New" page listed on the Table of Contents to return here.

NOTE: Depending on your assigned User Role, the following changes and enhancements may not affect your use of the VTC Admin Console.

Export Examinees

Repackaged the ‘Export Examinee’ data function from User Management into a report that is available under ‘Reports’. The report is now run in the batch environment and not as part of the user's session.

- *Reports,* Export Examinees

ACT Invoice Reports

New security model for the ‘Invoice Details Report’.

- *Reports,* ACT Invoice Report

Finance Reports

Two new Financial Reconciliation reports allow ACT Finance to better track order data between the Validus system and the eBusiness system. An ‘Orders not in Oracle’ report and an ‘Orders not Booked or Closed’.

- *Reports,* Financial Order Reconciliation

New ‘Financial Charge Back report’ that allows retrieving aggregate count information system about the number of registrations created in the system and the number of assessments taken. New ‘financial charge back’ data fields for Programs and Realms.

- *Reports,* Financial Charge Back

USER BATCH LOADER

Validus Registration Loader (Batch Loader) enhancements include: True duplicate record checking within an input file, duplicate file checking within a realm, and strict validation requirements checking for attributes. New data fields on Realms and Attributes.

- *User Batch Load*
- *Create a Realm*, Realm details tab
- *Create Attribute*, Attribute tab

WEB SERVICES

Updates to the Identity and Registration web services to allow 3rd parties to create and retrieve user accounts and data. Updates to allow calling from PHP Client code. New token base security model.

ATTRIBUTES

New multi-response attribute type allows the user to select multiple values for an attribute.

- *Create Attributes*
- *User Batch Load*, & data exports

MWK AUTO-UPDATE

New process that automatically updates the MWK automated run output files upon retrieval should the files fail to save properly during the nightly certificate generation run.

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VTC Console Administrator Overview

Help Navigation? For instructions on how to navigate the VTC Online Help System, print topics or chapters, or to access or print a single-screen PDF version of the online help, please refer to the *References* topic. Please also verify you meet the hardware and software *Requirements* before running this application.

What's New? For a list of updates since the last VTC Admin Console release, please see the *What's New* page. Direct links to the new, corresponding help topics are provided.

The Validus® Virtual Test Center (VTC) is a multi-purpose application designed to assist a variety of clients in administering tests, online courses and questionnaires, and registering the users who are required to complete them.

This Virtual Test Center Console Administrator Guide is an all-encompassing view of the available administrative features of the VTC Administrator Console. You can use the VTC Console to manage site information pertaining to realms, groups, user accounts and access levels. You may also set up test assessments, register examinees, monitor the use of the application, and authorize the launching of tests.

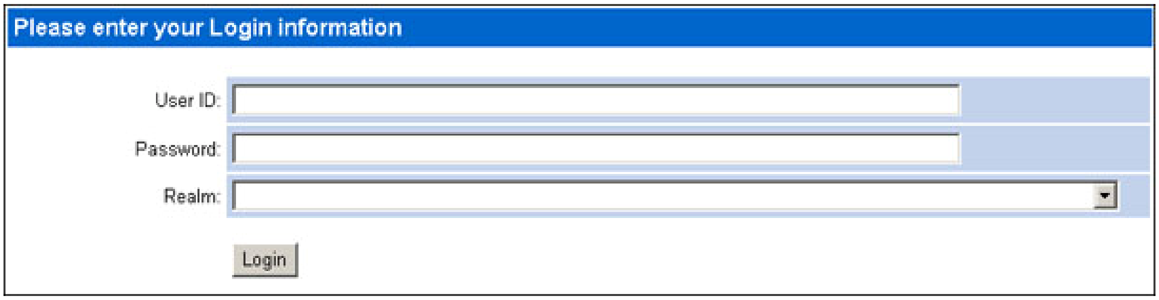
Based on the user role(s) assigned to you, you may or may not have access to all of the features described, or they may not apply to the needs of your realm.

For a detailed explanation of the user roles, functions, and system access, review the section on "User Roles" at the end of the VTC Overview topic.

- **NOTE**: The VTC RSP application (which stands for Registration, Schedule, and Payment) is the application examinees will log into to launch their scheduled assessments. Examinees should never log into the VTC Administrator Console.

Logging In

After navigating to the URL for the VTC Administrator Console, enter your User ID, Password. Use the drop-down box to select the Realm you wish to enter.



Click **Login**.

After the user's information is authenticated, the Welcome page and Main Menu will display according to the realm you selected and your assigned user role within that realm.

- Users logging in for the first time should click **My Account** from the main menu to verify the information is correct and complete.

If you experience trouble logging in, double-check that your User ID, Password, and selected Realm were entered correctly. Passwords are case sensitive. If you still cannot log in, contact your Realm Manager or contact ACT's Help Desk staff at 1-800-498-6485.

Locked Out

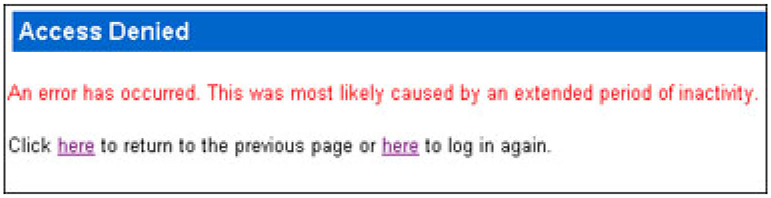
For security reasons, if a user tries to log in five times in a row and is unsuccessful, the account will be disabled. Users should contact the Realm Manager or the ACT Help Desk to have someone re-enable the account. If a user has forgotten the password, the Realm Manager can reset the password, and a new one will be sent to the email address on file for that account.

An account can also be locked by someone with sufficient authority (account manager or above). The locked account will be inaccessible until it is unlocked.

- For details about how to lock, unlock, or enable existing user accounts, please refer to "Change account status" in the *Account Management* topic.
- For details about how to change user information including password, refer to the "Security tab" in the topic *Create a New User*.

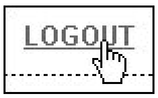
Timing Out

For security reasons, after a long period of inactivity the application will time out. You will be required to log back in.



Logging Out

Be sure to log out when you are finished using the application by clicking the **Logout** button located in the top right corner of every screen.



Main Menu

The Virtual Test Center main menu appears on the left-hand side of nearly every screen in the application. A brief description of the menu items are listed below. The "active" menu item you are using will be highlighted.

***NOTE**: Depending on the role assigned to you, you may not have access to all of the described features. Program Management, Realm Management, Global User Search, and Title Management are for ACT Administrative use only.*

Ultra Users have access to all Menu functions.

My Information

- **Home** — Click the **Home** key to return to the opening Welcome page. If the realm owner has set up customized "Welcome Text," users will see that message displayed here.
  User Role Access: All user roles
- **My Realm** — Review, edit, create, or delete your realm's attributes including roles, templates, banners and logos, etc. Depending on your access level, you may or may not be able to modify all of these characteristics.
  User Role Access: Finance Manager, Realm Manager
- **My Account** — Review your user account including password, user name, email address, and assigned user roles. Depending on your access level, you may or may not be able to modify all of these characteristics.
  User Role Access: All user roles

Users and Assessments

- **User Management** — Search for existing users, view search results, create, edit or delete user accounts.
  User Role Access: Finance Manager, Password Manager, Proctor, User Manager, User Viewer
- **User Batch Load** — Batch load new user accounts within a realm and monitor previously uploaded files.
  User Role Access: Validus Registration Loader, Validus Registration Loader Admin, Validus Registration Loader Manager; Program Manager may be added to one of the Loader roles
- **Account Management** — Search for existing accounts, view search results, or modify a selected account's status.
  User Role Access: Account Manager
- **Group Management** — Search for existing groups, view search results, edit a selected group name or authorization, assign users and sub-groups, send email to a selected group, delete or create a group.
  User Role Access: Proctor, User Manager
- **Profile Management** — Set up or review profile "shortcuts" which list the assessments a user is required to take and the scores that an examinee is expected to earn.
  User Role Access: Profile Manager
- **Barcode Management** — Define the Barcodes and the paper and pencil tests (PNP) or other assessments associated with them.
  User Role Access: Barcode Manager
- **PNP Management** — Associate paper and pencil (PNP) site codes with a realm, manage certificate flags, and set up PNP site administrators.
  User Role Access: PnP Manager
- **Order Management** — View billing orders associated with the realm.
  User Role Access: Order Manager
- **Financial Profiles** — Define billing profiles that link the launching of VTC tests requiring payment and the finance system as well as change the default profile.
  User Role Access: Financial Profile Manager

- **Attribute Management** — Define the personal and registration characteristics for your realm.
  User Role Access: Attribute Manager
- **Assessment Management** — View the current administration and assessment list, set up a new administration, assessment, or edit or delete an existing administration or assessment.
  User Role Access: Assessment Manager, Attribute Manager, Finance Manager (for payment options)
- **Reports Portal** — Launch an external web site to run reports that have been set up by ACT staff. Not all realms will require access to the reports portal.
  User Role Access: Portal Manager

Outside your realm

- **Program Management** — View a list of existing programs, edit a selected program's name or portal URL, or create a new program.
  User Role Access: Ultra User only
- **Realm Management** — Search for existing realms, view search results and realm details, edit, copy, or delete a selected realm, or create a new realm.
  User Role Access: Ultra User only
- **Entity Management** — Manage entities and the corresponding contact lists for those institutions. Search for an existing entity to view, edit, or delete, or to create a new entity.
  User Role Access: Entity Manager
- **Barcode Generate** — Generate 10 Barcodes in CSV file format to use in conjunction with tracking paper and pencil tests.
  User Role Access: Barcode Generator
- **Global User Search** — Search for an existing user account in any realm to find the user's first name, last name, User ID, or associated realms.
  User Role Access: Help Desk
- **Title Management** — View the current list of titles, create a new title, edit or delete an existing title, or control sites that have access to view and administer the titles.
  User Role Access: Test Author
- **Reports** — Run reports based on the data stored in the Virtual Test Center.
  User Role Access: Financial Charge Back Reports, Finance Reporting, FSOT Reporter, Report Invoice Admin, Report Invoice Remote, Report Invoice, Report Manager, User Manager (for Export Examinees)
- **System Management** — Only System Managers and ACT staff have access to this portion of the application. Controls automated system-level functions and user roles.
  User Role Access: System Admin

Help

- **References** — Launch the help documentation. Default help is the VTC Online Help System. Adobe® Acrobat® Reader® is required to view PDF help documents.
  User Role Access: All user roles

User Roles

User roles are predefined by the applications that use VTC and can only be set up by authorized ACT staff and developers.

The primary functions and menu access point of the roles within the Virtual Test Center system are as follows:

***NOTE**: All user roles have access to Home, My Account, and References.*

System management roles

- **System Admin** — Modify system-level configurations for the realm including automated job scheduling and maintenance, batch process cleanup, and user role management.
  Menu Access: System Management
- **Ultra User** — Access all features of the VTC.

Realm and Program management roles

- **Entity Manager** — Create, view, and update various educational institution data. (Entity Management is currently a standalone section of the Virtual Test Center Console and not widely used at this time.)
  Menu Access: Entity Management
- **PnP Manager** — Associate Paper and Pencil sites with a realm.
  Menu Access: PNP Management
- ***Realm Manager** — Create, update, and delete realms, (including user roles) for the realm or realms you are assigned to manage.
  Menu Access: My Realm

User/Account management roles

- **Account Manager** — Disable, lock, unlock, and reset passwords of existing users within the realm.
  Menu Access: Account Management
- **Help Desk** — Search for users across realms.
  Menu Access: Global User Search
- **Examinee** — Register, schedule, and pay for tests launched using the VTC RSP application. Examinees do **not** use the VTC Administrator Console URL.
- **Go to RSP** — Enables the "Go to RSP" button which launches the VTC RSP application. User Managers and User Viewers can register or schedule tests, or launch tests for registered examinees. (Must be assigned in conjunction with the User Manager and/or User Viewer role.)
  Menu Access: User Management
- ***Password Manager** — View and edit passwords in the Security tab in User Management, provided they are also assigned the User Manager role.
  Menu Access: User Management

- ***Proctor** — Authorize or release proctored tests. Send a pre-defined email template to a group of users.
  Menu Access: User Management, Group Management
- ***Program Manager** — Under User Batch Load, allows users to escalate a batch file within a Program. (Must be assigned in conjunction with user management role Validus Registration Loader Admin or Registration Loader.)
  Menu Access: User Batch Load
- ***User Manager** — Create, view, update, and delete user records within the realm (includes roles). To view or edit user passwords, User Managers must also be assigned the Password Manager role. To export user records from the Reports menu, users must also be assigned the Report Manager role.
  Menu Access: User Management, Group Management, Reports (if assigned the Report Manager role)
- ***User Viewer** — View user records within the realm (includes roles and registrations). User Viewers may not edit user information unless given the User Manager or Password Manager role.
  Menu Access: User Management
- **Validus Registration Loader Admin** — View and manage all batch load user files; does not include setting priority levels.
  Menu Access: User Batch Load
- ***Validus Registration Loader** — View and manage only the batch load files they have uploaded.
  Menu Access: User Batch Load
- ***Validus Registration Loader Manager** — View and manage all batch load user files; includes setting realm-level priority levels.
  Menu Access: User Batch Load

Assessment management roles

- **Assessment Manager** — Create, view, update, and delete Administrations and Assessments within the Realm.
  Menu Access: Assessment Management
- ***Attribute Manager** — Create, view, and manage the personal and registration attributes and other data characteristics that you want to collect from users.
  Menu Access: Attribute Management, Assessment Management
- **Barcode Generator** — Generate the CSV file of barcodes that will be linked to assessments under Barcode Management.
  Menu Access: Barcode Generate
- **Barcode Manager** — Define the generated barcodes and the assessments that are linked to them.
  Menu Access: Barcode Management
- **Profile Manager** — Set up the profile "shortcuts" to pre-select the assessments that examinees are required to take.
  Menu Access: Profile Management
- **Test Author** — Create, view, update, and delete test titles.
  Menu Access: Title Management

Reports management roles

- **Portal Manager** — Launch the realm's portal reporting site.
  Menu Access: Reports Portal

- **Finance Reporting** — Generate both financial report types, Financial Charge Back and Financial Order Reconciliation reports.
  Menu Access: Reports
- **Financial Charge Back Reports** — Generate the Financial Charge Back reports. (Must be assigned in conjunction with the Report Manager role.)
  Menu Access: Reports
- **FSOT Reporter** — Generate the FSOT Extract reports. (Must be assigned in conjunction with the Report Manager role.)
  Menu Access: Reports
- ***Report Invoice** — Generate the ACT Invoice Details reports for their realm and retrieve previous reports that they generated. (Must be assigned in conjunction with the Report Manager role.)
  Menu Access: Reports
- ***Report Invoice Remote** — Allows users generating ACT Invoice Reports from a different (remote) realm to include order details and examinee data from the assigning realm. (That user must also be assigned the Report Manager and Report Invoice role in their own realm.)
  Menu Access: Reports
- ***Report Invoice Admin** — Users may run ACT invoice details reports for their realm and retrieve reports generated by others. (Must be assigned in conjunction with the Report Manager role.)
  Menu Access: Reports
- ***Report Manager** — Access to the Reports menu. Must be assigned in conjunction with one or more report type role (or the User Manager role for Export Examinees) to view reports on the Reports menu.
  Menu Access: Reports
- ***User Manager** — Export user records from the Reports menu. (Must be assigned in conjunction with the Report Manager role.)
  Menu Access: User Management, Group Management, Reports

Finance management roles

- ***Finance Manager** — Edit the realm and user details related to finance.
  Menu Access: My Realm, Assessment Management, User Management
- **Financial Profile Manager** — Create and edit financial profiles.
  Menu Access: Financial Profiles
- **Order Manager** — View the status and details of billing orders.
  Menu Access: Order Management

* = Can perform limited functions within the menu where access is granted.
Specific access limitations are described at the top of each relevant menu topic.

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Home Page

User Role Access: All user roles

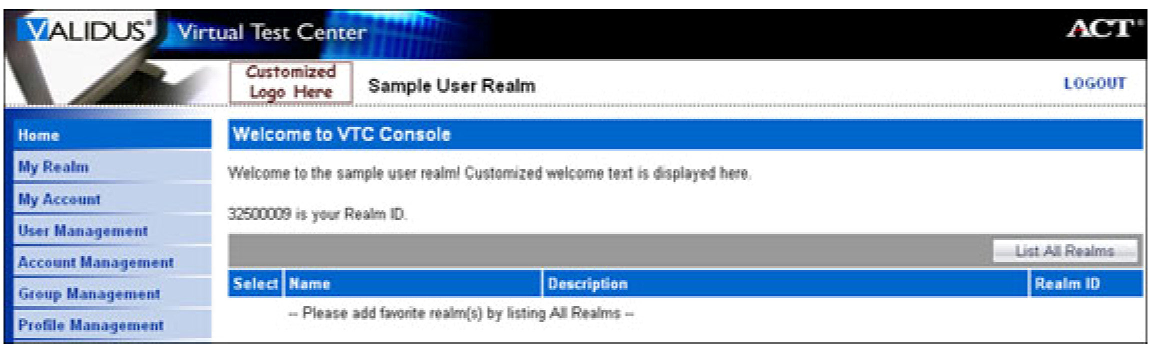
Clicking the **Home** option from the main menu will return you to the Realm's home page.

The Home Page is the first page users will see after logging in. If customized "Welcome Text" has been entered, users will see the message displayed on the realm's home page.

Users who have access to multiple realms can use the Home page to switch between realms without having to log out.

On all screens of the application:

- You will see the realm name and Realm ID displayed at the top of the screen. Should you need to refer to your Realm ID for any reason this is where you can locate that number.
- Any customized logo that may have been entered by a Realm Manager will be displayed next to the name of the realm.

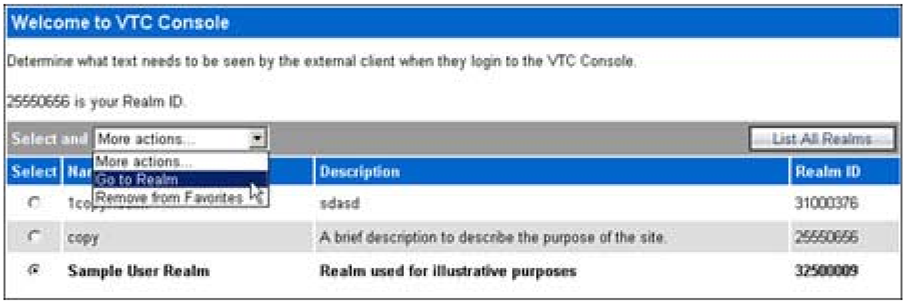


- Switching Realms
- Favorite Realms

Switching Realms

Click **List All Realms** to view a list of realms you have access to. Or, if you have a list of favorites stored, and the realm you want to switch to is shown on the Home page, click the radio button next to the realm you wish to switch to.

Then, using the **More Actions...** drop-down box, click **Go to Realm**.



You will immediately be transferred to the other realm.

All menu access, functionality, and Home Page text is dependent on how the realm has been set up, and also on your user role within that realm. For example, if you have different user roles between realms, you will see a different Main Menu.

Favorite Realms

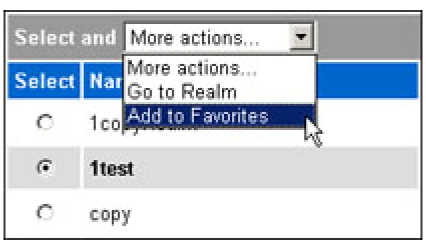
If you find you switch between realms frequently, you may want to add them to your list of favorites so that they automatically appear on your Home Page.

Add a favorite

To set up a list of favorites, or add to your list of favorites, first click **List All Realms** to view a list of the realms you have access to.

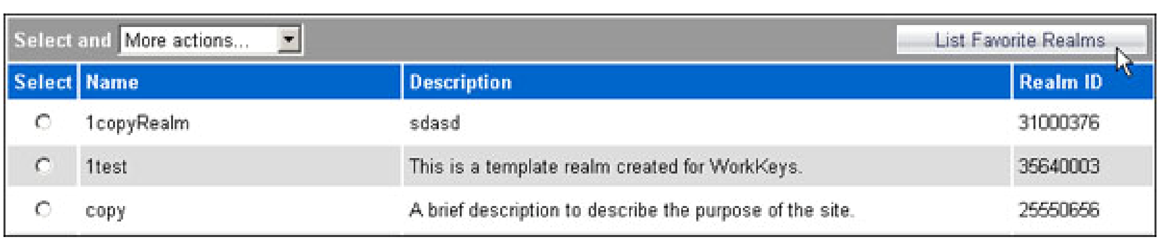
Click the radio button next to the realm you want to add to your list of favorites.

Then, using the **More Actions...** drop-down box, click **Add to Favorites**.

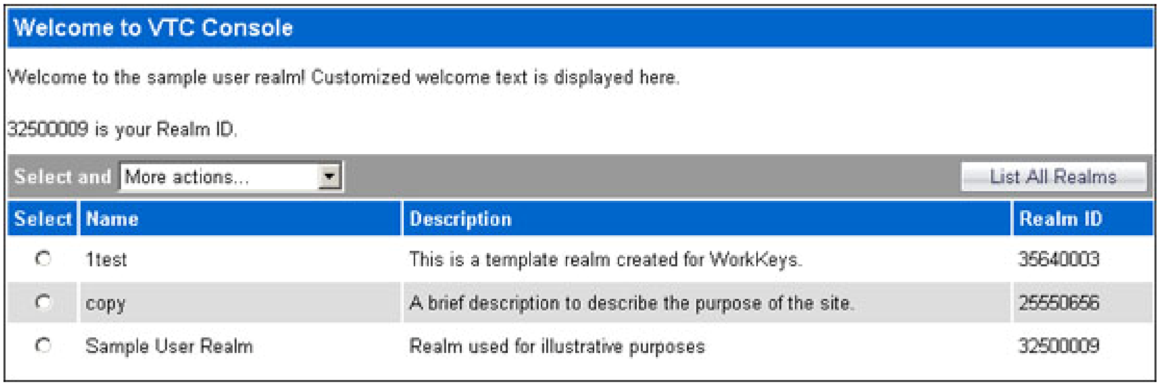


Continue adding as many realm names to your list as you want.

When you are finished, click **List Favorite Realms**.



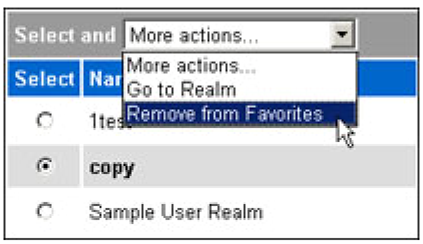
This will return you to the Home Page where you can view the list of favorites you have created. Anytime you return to the Home Page, your favorites will be listed for you.



Remove a favorite

From the list of favorites on the Home Page (as shown above), click the radio button next to the realm you want to remove.

Then, using the **More Actions...** drop-down box, click **Remove from Favorites**.



The realm name will be removed from the list and will no longer be displayed on the Home Page.

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My Realm

User Role Access: Ultra User, Finance Manager, Realm Manager

- *The Finance Manager role only has access to the Realm and Finance tabs.*
- *The Realm Manager role has access to all but the Finance tab.*

Click **My Realm** from the main menu to view and/or edit the characteristics of the realm you are logged into. The functions available to you are based on your assigned user role.

WARNING: Before changing your realm's settings, be sure that any User Batch Load files in your realm have finished processing. Any file already in progress will continue processing while the new settings take effect and may cause the file processing to fail. (See the *User Batch Load* topic for more information.)

See also: Create a New Realm

Edit your realm

There are several tabs of information associated with each realm. They are labeled "Realm," "Finance," "Roles," "Languages," "Templates," "Entities," "SubRealms," and "Scheduling Types." The tabs available to you are based on your assigned user role.

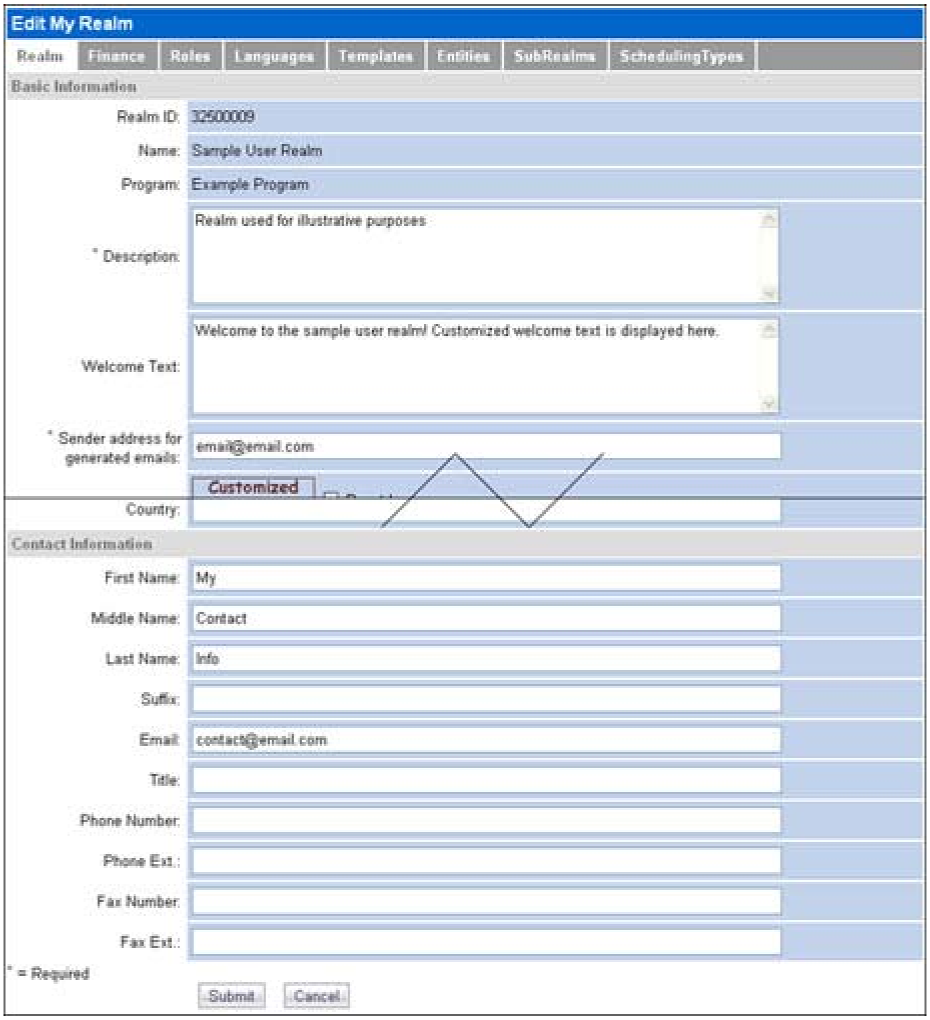
Click the tab title to view or edit the stored data for your realm. Required fields will be marked with an asterisk.

Realm details tab

The **Realm** tab is the first tab, shown by default when you click **My Realm**.

It includes the basic realm characteristics and setup information. (Partial view shown below.)

**Indicates a required field.*



- On the "Realm" tab, the Realm ID, Name, and Program fields are always uneditable. If it becomes necessary to change this information, the realm will have to be deleted by ACT staff and a new realm created.

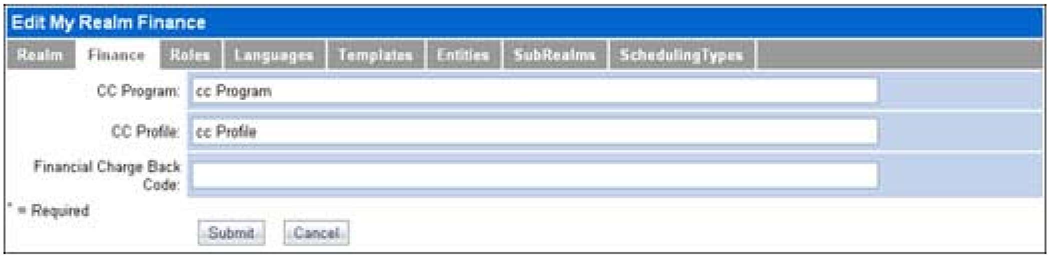
Click **Submit** if you have made changes to your data.

- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under the "Realm details tab".

Finance tab

The **Finance** tab stores credit card information if the realm requires examinees to pay a fee.

- **NOTE**: This information should only be filled in by a staff person in ACT's financial department. Setting or changing this information will require a user with access to the Finance Manager Role.



Click **Submit** if you have made changes to your data.

- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "Finance tab".

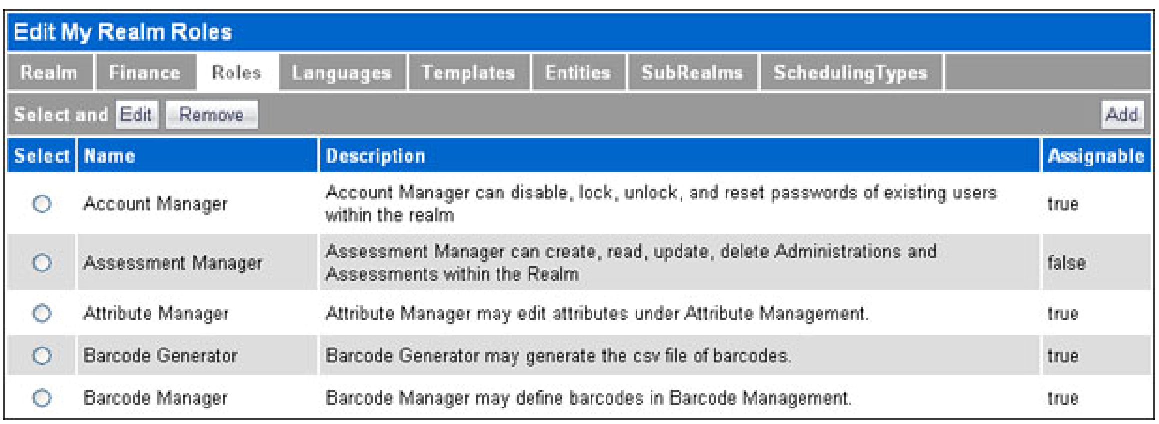
Roles tab

Designate the user roles that are required to access the realm and whether those roles may be assigned by others with that user role. All roles currently available to your realm will be listed.

Click the radio button to select a role if you need to **Edit** whether the role is assignable, or **Remove** role from use at your Realm.

Click **Add** to select additional roles for use at your Realm.

- **NOTE**: Roles are typically defined by the applications that use VTC. Roles can only be created and/or made visible for Realm usage under System Management.



Click **Submit** if you have made changes to your data.

- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "Roles tab".

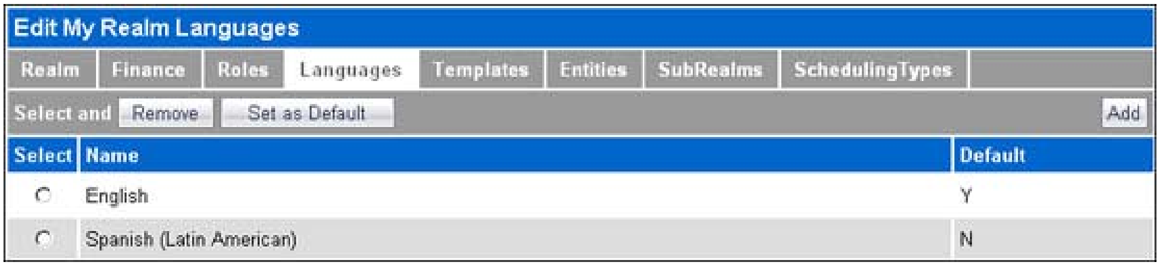
Languages tab

Set the default language or add language translations for your realm. The current default and language settings will be displayed. For new realms, English is the default language.

Click the **Add** button to add a language to your realm.

To remove a language or change the selected default language, select the radio button next to the language name. Then click **Remove** or **Set as Default**.

You cannot remove the language currently marked as default and realms must have at least one language.



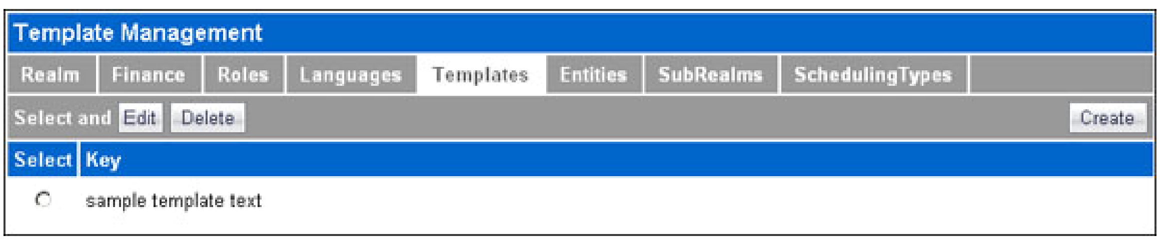
- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "Languages tab".

Templates tab

Templates help disseminate important information about your realm to users and examinees.

The list of templates that have already been set up will be displayed. If none are listed, you will need to create a template. Choose the subject, content, formatting, and data fields that best suit your needs.

To edit or delete a template, select the radio button next to the template title. Then click **Edit** or **Delete**.



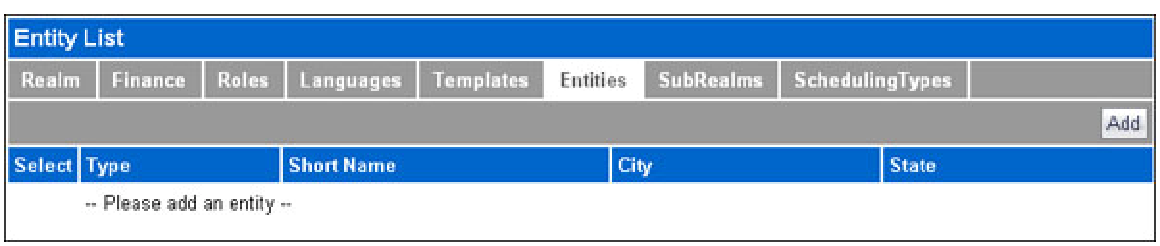
- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "Templates tab".

Entities tab

The **Entities** tab is the only tab not available in Realm Management. It is only available by clicking **My Realm**.

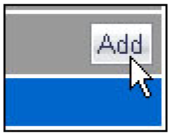
Entities are institutions that may be linked to your realm so that assessments that are offered at or required by those institutions may be selected during assessment setup.

If entities have been added they will be listed for you.



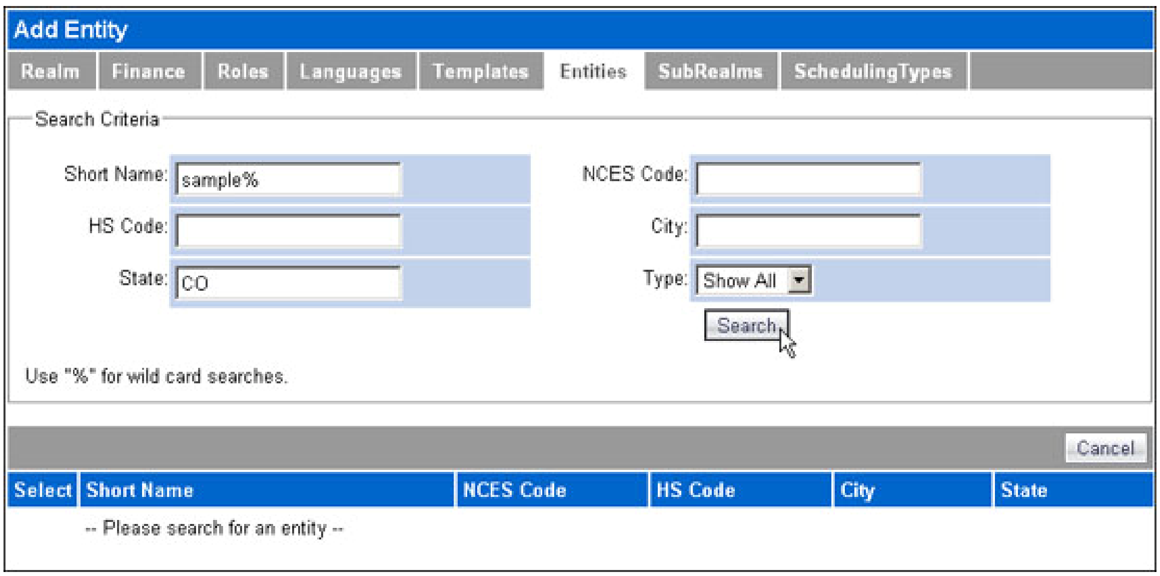
ADD AN ENTITY

To link Entities to your realm, click the **Add** button on the far right side of the screen.



In the search criteria text entry fields, enter text in the Short Name or City fields, a 2-letter state abbreviation in the State field, and/or numerical values in either of the code fields. If you wish, use the % sign as a wild card character to help you. Use the drop-down box to select Institution or Show All.

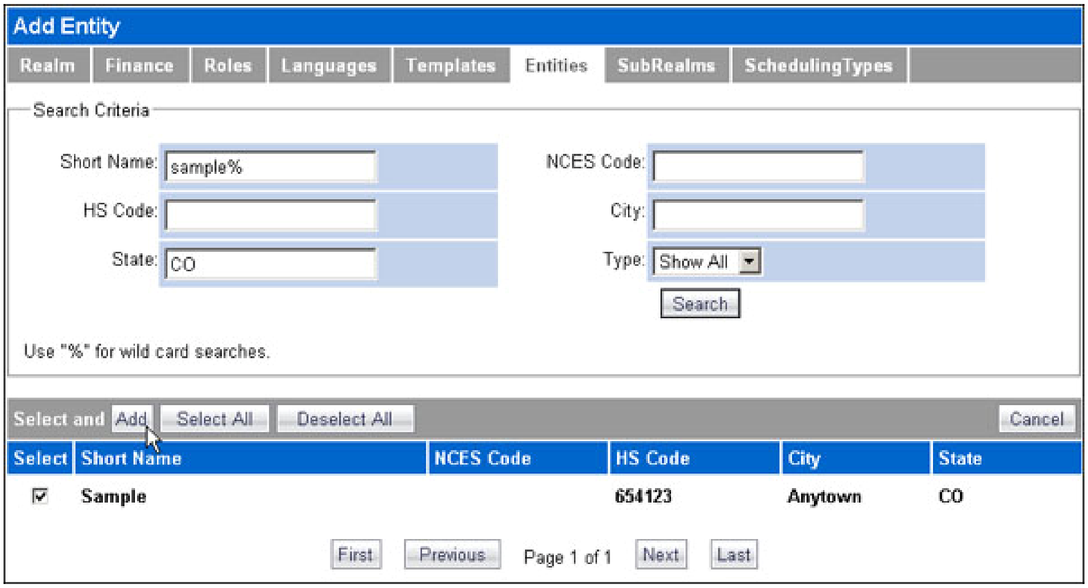
Make your criteria selections and click the **Search** button. (Or, you may leave the search fields blank to display all available institutions.)



The search results, including the entity's name, NCES Code, HS Code, City and State will be displayed beneath the search criteria, in the lower frame.

If you see the Entity you want to add to your realm, mark the checkbox next to the name.

Click the **Add** button located above the entity list.

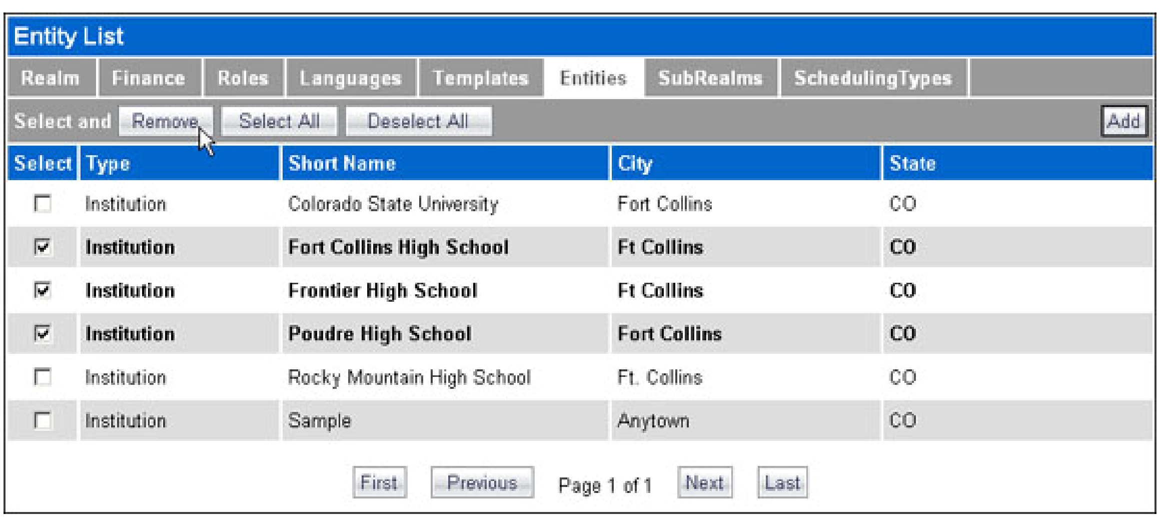


This will return you to your list where your Institution will be displayed.

REMOVE AN ENTITY

To remove an entity from your list, mark the checkbox next to the institutions you wish to remove.

Then click the **Remove** button located above the list. (If you have to select a large number of entities, use the **Select All** and **Deselect All** buttons.)



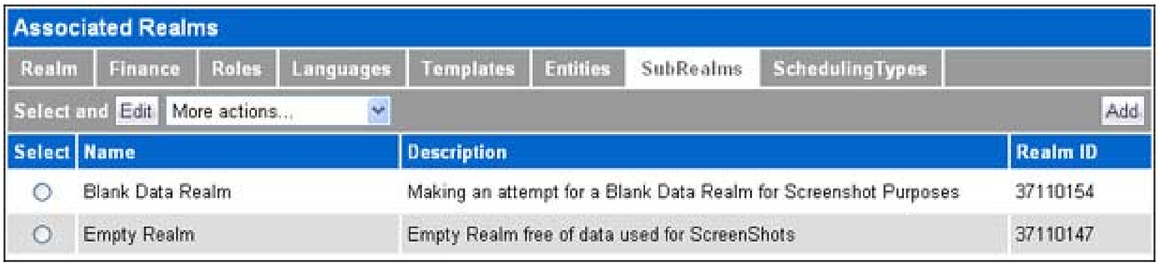
A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to remove the selected entities and return to the updated list, or click **Cancel** to return to the list without making changes.

SubRealms tab

If your user ID is linked to other realms, you may add one or more of those realms as a SubRealm. Also, if your Realm has been marked as an Agency in the Realm tab, it will automatically be set up as a SubRealm of itself. (SubRealms are primarily for "MyWorkKeys" users.)

From the "SubRealms" tab, you may view, add, or remove associated realms, and manage administrator accounts that are linked to the SubRealm.



Select	Name	Description	Realm ID
○	Blank Data Realm	Making an attempt for a Blank Data Realm for Screenshot Purposes	37110154
○	Empty Realm	Empty Realm free of data used for ScreenShots	37110147

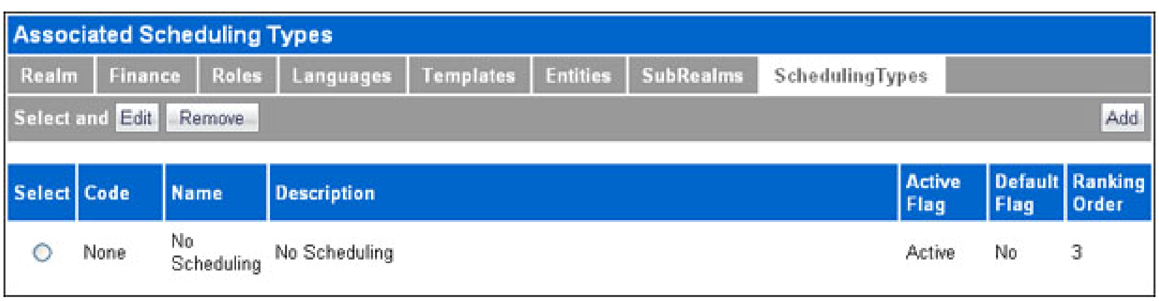
- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "SubRealms tab".

SchedulingTypes tab

If Scheduling Types have been set up under System Management by ACT Administrators for your Program, the Realm will automatically default to the System's settings.

Use this section to further customize the Scheduling Types for your realm.

- If Scheduling Types have not been set up for your Program, you will not be able to use this feature.



Select	Code	Name	Description	Active Flag	Default Flag	Ranking Order
○	None	No Scheduling	No Scheduling	Active	No	3

- For detailed information about the contents and features of this tab, please refer to the *Create a New Realm* topic, under "SchedulingTypes tab".

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My Account

User Role Access: All user roles

Click **My Account** from the main menu to review stored user account data including password, user name, email address, and user roles. Be sure your account is complete and up-to-date.

Edit your account

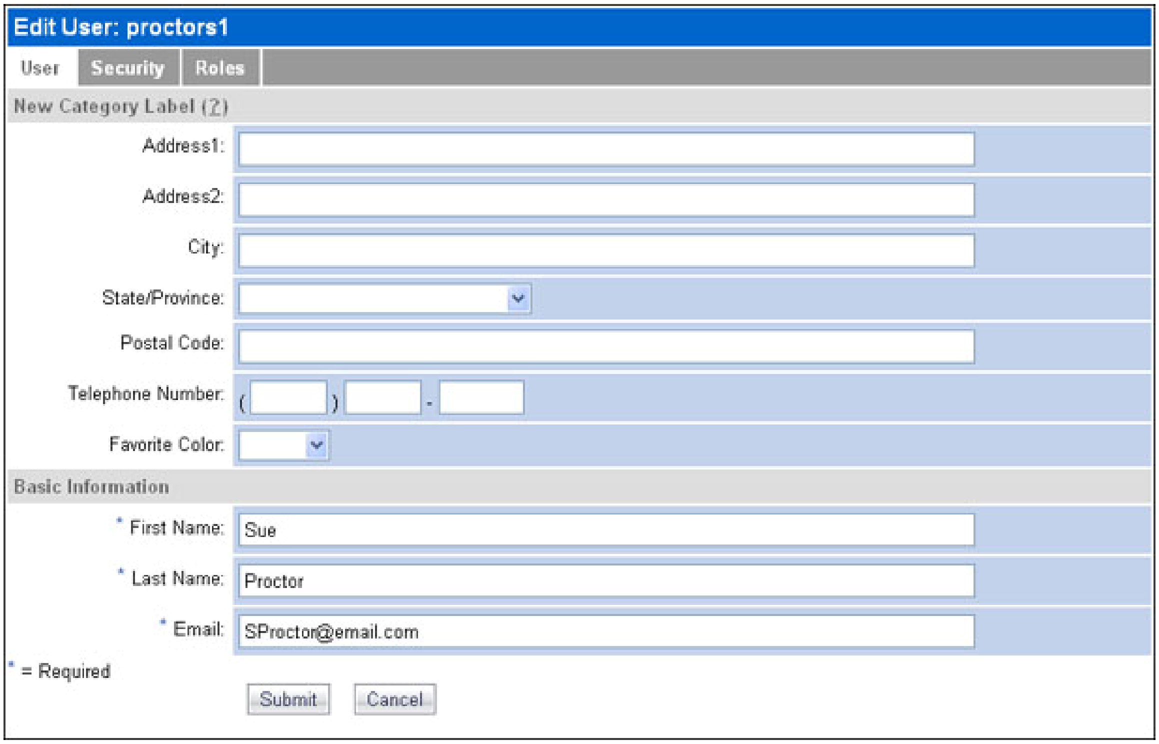
There are three tabs of information associated with each user account. They are labeled "User," "Security," and "Roles." Click the tab title to view the stored data.

User tab

**Indicates a required field.*

First name, last name, and email are by default the only required attributes but others may have been set up as needed for your realm.

- For detailed instructions about how to set up customized user attribute fields, please refer to the topic on *Attribute Management*.



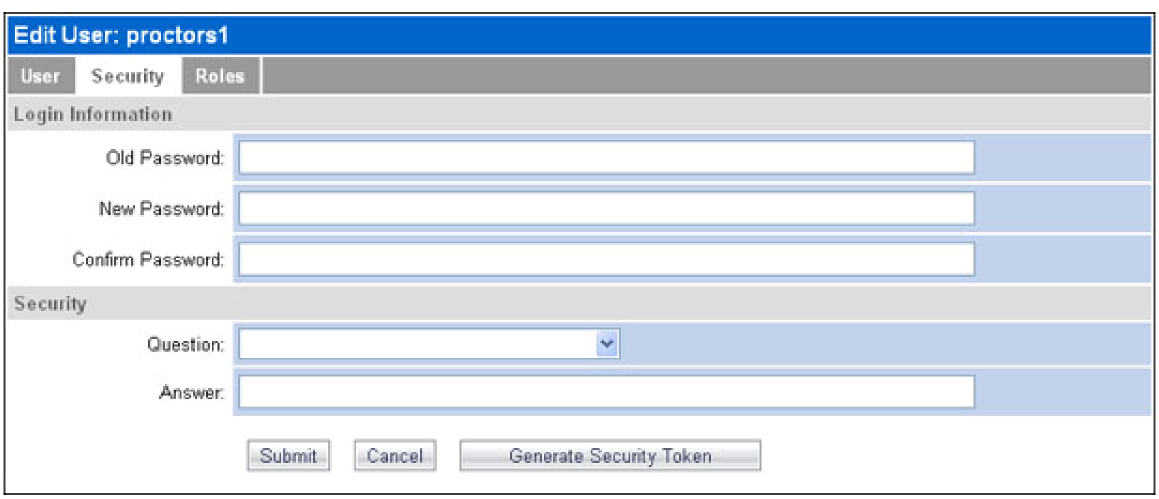
Enter any user data for empty attribute fields that are requested or required.

Make changes to existing information if necessary.

When you are finished, click **Submit** to save your data and advance to the "Security" tab.

Security tab

From here you may change your password, set up your security question, or generate security tokens if a user from another realm needs to associate your user account with that realm.



Password: To change your password, first enter your old password in the top field. Enter your new password twice. For security reasons, the password will not be displayed on-screen.

Security Question: To set up your security question, select a question from the drop-down list of questions. Enter the answer to the security question in the text box below.

NOTE: The security question is only applicable to examinees or other users who may need a password reminder to log onto the RSP (Registration, Schedule, and Payment) application. It does not affect user accounts in the VTC Admin Console.

Generate Security Token: As a security precaution, users seeking to add your account to their realm must have a security token that you generate before they will be allowed to associate your ID with their realm. (Users with higher administrative rights to the VTC Admin Console will not need a token). Please note the tokens are only valid for 15 minutes. You will need to coordinate timing with the user who needs to link to their realm or realms.

Click **Generate Security Token** when you are ready.

A pop-up window will appear. The token will be displayed. Click **Print** to print the token or write it down.

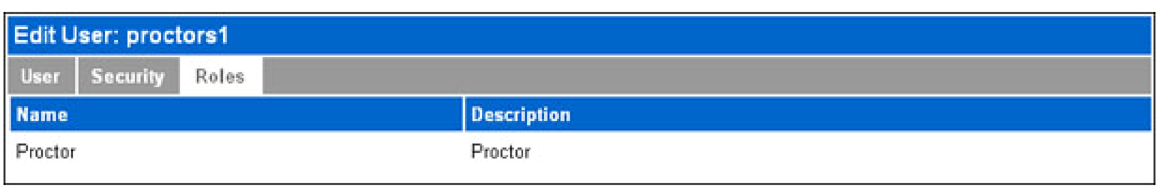
Provide this number and your User ID to the User Manager or other administrator who will link you to their realm.

Close the pop-up window to return to the My Account window and the VTC Admin Console.

When you are finished, click the **Submit** button to save your data and advance to the "Roles" tab.

Roles tab

All the roles that have been assigned to you will be displayed. You cannot change your own role assignment.



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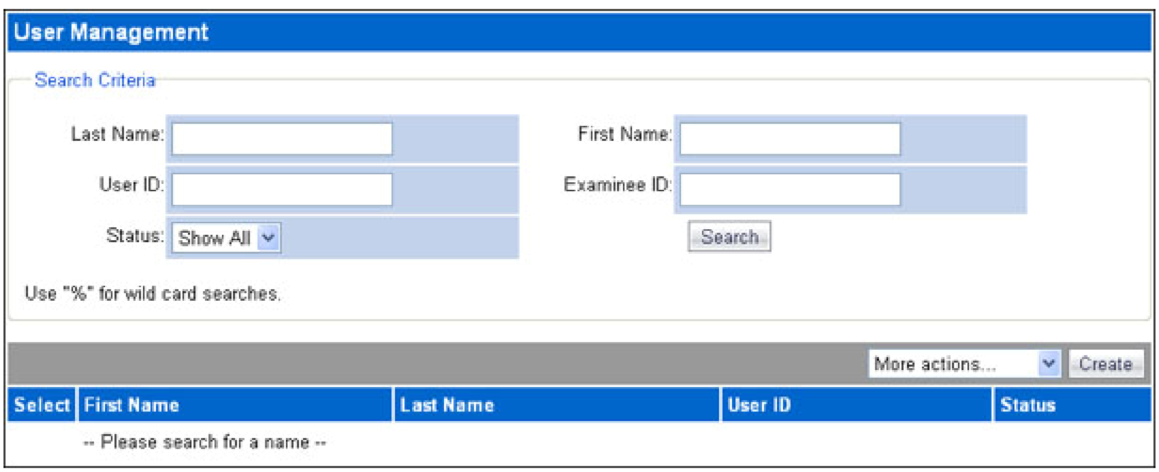
User Management

User Role Access: Ultra User, Finance Manager, Password Manager, Proctor, User Manager, User Viewer

- *The Finance Manager, Proctor, User Manager, and User Viewer roles have partial access based on the tasks that are assigned to that role.*
    - *The Finance Manager role can charge examinees a fee for no-shows and has access to the user's personal and registration attributes in view-mode only.*
    - *The Proctor role can only perform proctor-related tasks (such as run an instant report, assign individual users to a group, view user data and registration, stop an active session, or to authorize/unauthorize individual examinees).*
    - *The User Manager role does not have access to the Realm tab and cannot authorize or unauthorize an examinee.*
    - *The User Viewer role has access to the user's data in view-mode only.*
- *The Password Manager role only allows access to the Security tab and must be assigned in conjunction with a User Manager or User Viewer role or it will not be activated.*

User Management will help you create, edit, and delete examinee accounts, register users for tests, view or modify the user's demographics information, etc. However, this section can also be used to assign user roles, monitor staff accounts, associate user accounts with other realms, export examinee records, and batch load user records into the application.

Click **User Management** from the main menu to manage the user accounts at your realm.



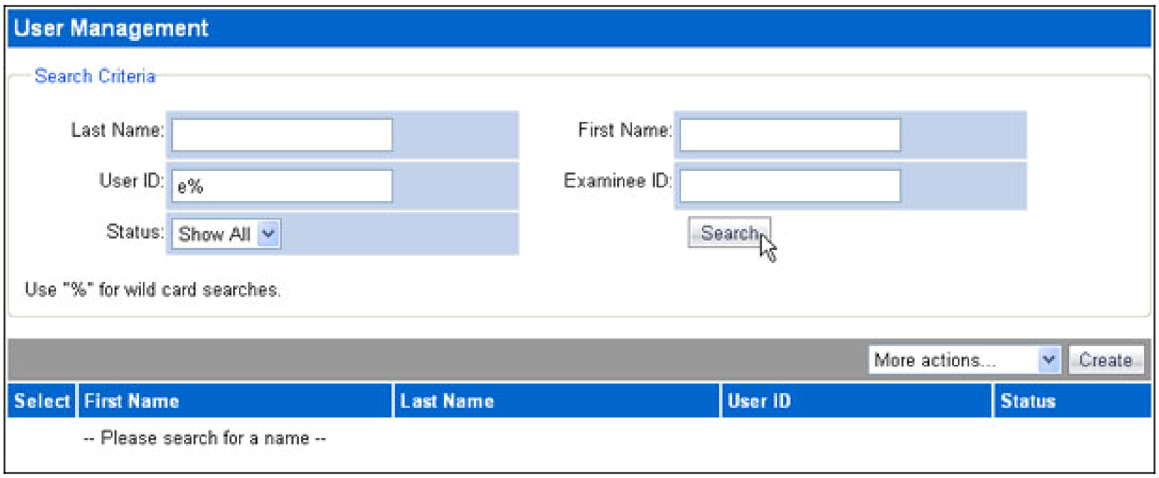
- Search for a user
- Edit a user
- Delete a user
- More actions... (drop-down box)
    - Associate User

See also: Create a New User, User Batch Load

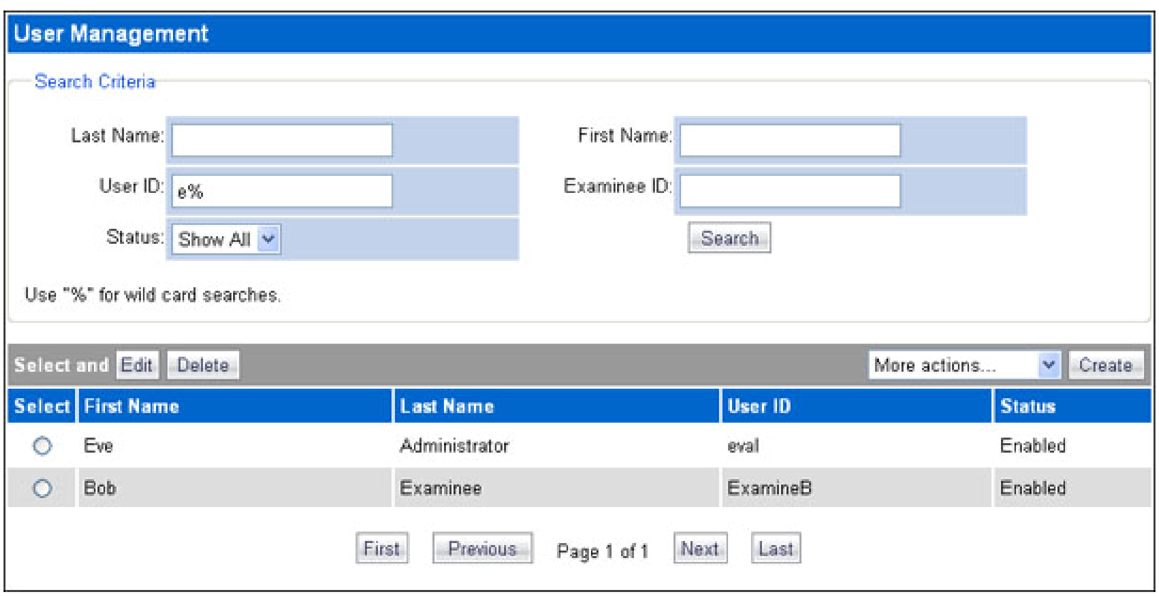
Search for a user

If you do not know the exact user you are looking for, use the % sign as a wild card character to enter any part of the last name, first name, User ID, and/or Examinee ID in the search criteria fields. Use the drop-down box to select the user status. (Or, you may leave the search fields blank to display all users in your realm.)

Make your criteria selections and click the **Search** button.



The search results, including the user's first and last name and user ID, will be displayed beneath the search criteria in the lower frame.



If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

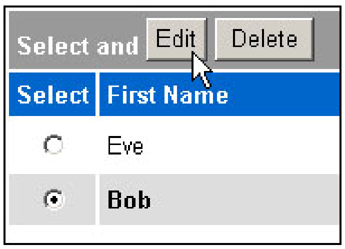
- *If there are too many pages of results and you are having trouble locating the user record you want, narrow your search criteria and try again.*

Edit a user

To edit a user, you must first perform a search to find the user record you wish to modify.

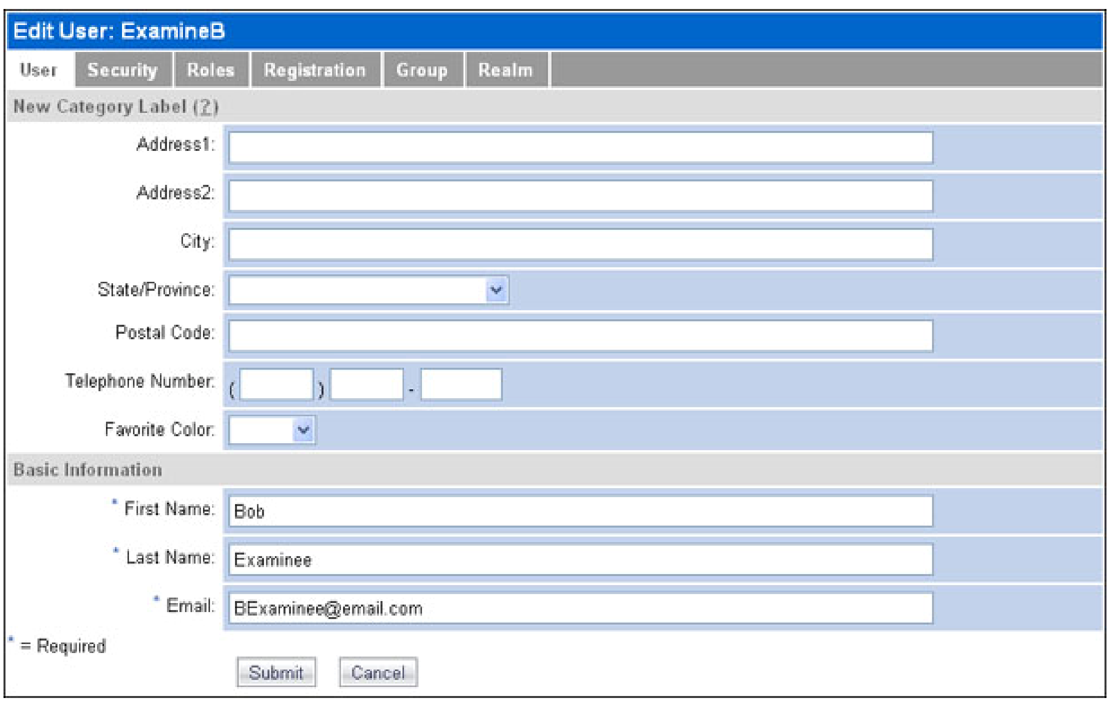
Once the user record is displayed in the search results, select the radio button next to the user's name.

Click the **Edit** button located above the user list.



There are several tabs of information associated with each user. They are labeled "User," "Security," "Roles," "Registration," "Group," and "Realm." Click the tab title to view the stored data.

An example of the User tab is shown below.



If you make a change on any page with a "Submit" button, you must click **Submit** to save your changes.

- For detailed information about the data fields in each tab, refer to the topic *Create a New User*.

Delete a user

To delete a user, you must first perform a search to find the user record you wish to remove.

Once the user record is displayed in the search results, select the radio button next to the user's name.

Click the **Delete** button located above the user list.

A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected user and return to the updated list, or click **Cancel** to return to the user list without deleting.

- **NOTE**: A user record cannot be deleted once registrations are associated with it.

More actions... (drop-down box)

Associate User

Associate User allows you to link users from other realms to your realm. This allows you to give access to your realm to other users without having to create a new account. (Please note you will need to assign user roles to the account once it has been linked.)

Unless you have higher administrative rights to the VTC Admin Console, you will need to work in tandem with the user you are associating with your realm.

As an added security measure, that user will need to access *their* My Account menu, and generate a token from the Security tab. They must provide their user name and token to you before you can associate them with your realm.

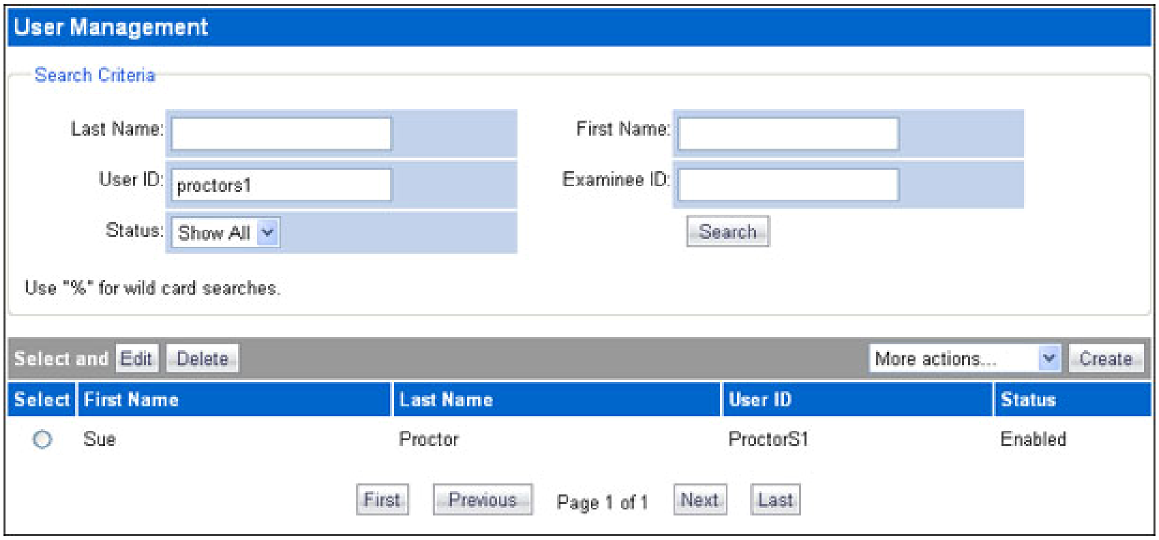
From the User Management page, click the **More actions...** drop-down box and select **Associate User**.

In the required User ID text-entry field, enter the exact User ID of the user you wish to link to your realm.

Enter the security token ID.

Click the **Submit** button.

If the search is successful, the search criteria for User ID will be filled in for you, the user will be displayed in the search results below, and the user account will be added to your realm.



If the search is unsuccessful, verify the User ID and token you entered is correct, and try again. If the token has expired, have the user generate another token.

- Please note the tokens are only valid for 15 minutes. You will need to coordinate timing with the user or users you are associating.

Once you associate the user, YOU MUST assign user roles to enable the correct access rights to your realm.

Click the radio button next to the user's name and on the **Edit** button located above the list of names to assign user roles, register the user for assessments, etc.

- For detailed information about the data fields in each user record, refer to the topic *Create a New User*.

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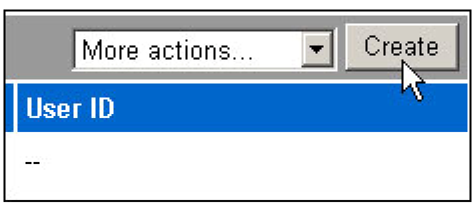
Create a New User

This section describes how to create a new user account and also describes in detail the fields and functionality of each tab in the User Record. Depending on your user role, you may not have access to all of the features described.

Create a new user

Click **User Management**.

To create an individual user, click the **Create** button located on the far right of the main User Management page.



- **NOTE**: If the Realm's "End User Create Required" flag has been set in *My Realm* or *Realm Management* "Realm Details tab", there will be no **Create** button on this page. Examinees will be required to create their own accounts when they log onto the RSP application.

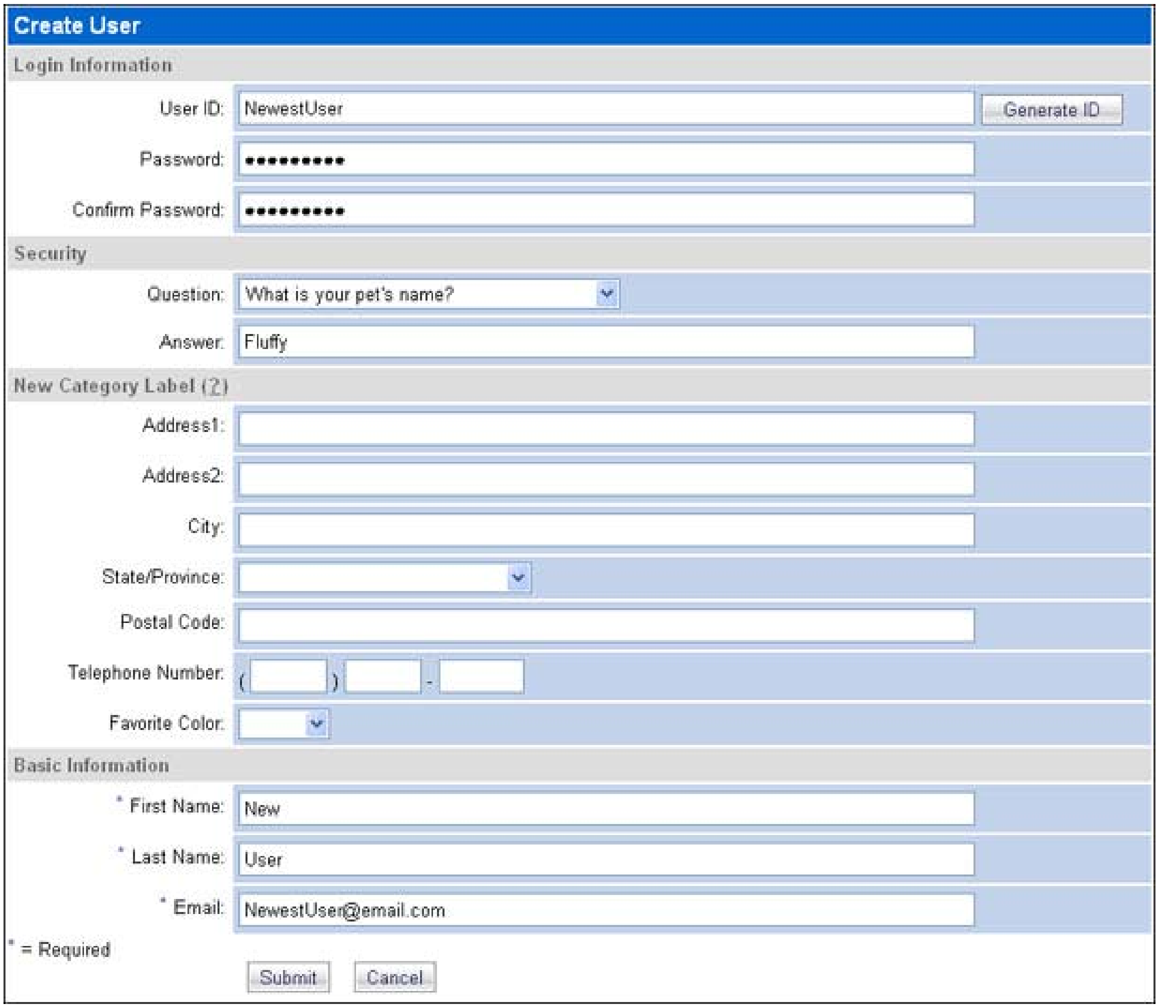
  If a non-ACT, administrative VTC account is required, that person will need to create their account using RSP and give their User ID to a current VTC Admin with User Management access. The Admin will then remove the Examinee role and grant the proper user roles to the account.

There are several tabs of information associated with each user. They are labeled "User," "Security," "Roles," "Registration," "Group," and "Realm." You must first enter the required, basic information on the "User" tab before advancing to the subsequent tabs.

User details tab

Enter basic user details and login information. (Your fields may vary based on the customizations set up for your realm.)

**Indicates a required field.*



Login Information: If you do not fill in the User ID and/or Password field, the login information will be auto-generated based on the first and last name fields when you click **Submit**. You may also click **Generate ID** after filling in the first and last name fields to generate a unique ID, as shown in this example.

Security: If desired, use the drop-down box to select a security question. Enter the answer to the security question in the text box below.

NOTE: The security question is only applicable to examinees or other users who may need a password reminder to log onto the RSP (Registration, Schedule, and Payment) application. It does not affect user accounts in the VTC Admin Console.

***Basic Information**: Enter the user's first name, last name and current email address. It is important that the email address be accurate as it may be used to send important information to the user.

NOTE: By default, only the first name, last name, and email address are required fields. However, Realm Managers may configure these attributes and other requested information if desired. The examinee will then be prompted to enter or update their own attributes when they log into the RSP.

When you are finished entering details in the fields listed above, you must click **Submit** to save your data.

You will automatically advance to the "Roles" tab where you can continue setting up the user account by assigning user roles.

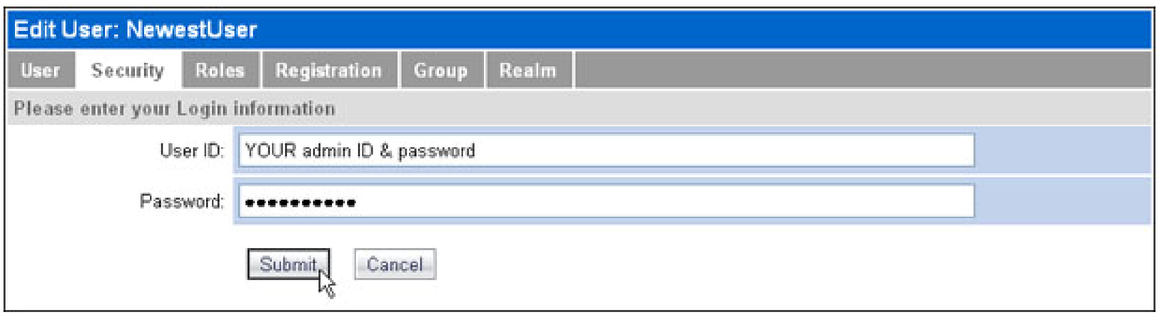
Security tab

The Security tab only appears for users who have been assigned the Password Manager role and is only useful when you Edit users. When you Create a user, the tab is skipped during creation.

This tab may be used to change or reset an existing user's password, look up a password, User ID, or Person ID.

When you click the Security tab, you will be asked to provide <u>your</u> User ID and Password, to verify that you are the valid account-holder who is making the change.

Enter your information in the fields and click **Submit**.

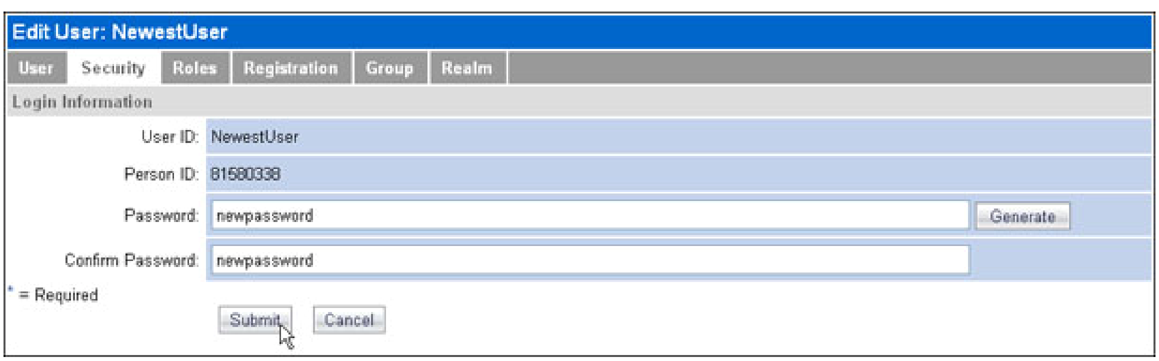


If your access is validated, you will see the user data for the account whose password you would like to view or change.

The Person ID may be used as a reference in communications with ACT about specific user accounts.

To change a password, enter a new password in the Password and Confirm Password fields, or click **Generate** to generate a password.

Click **Submit** when you are finished.



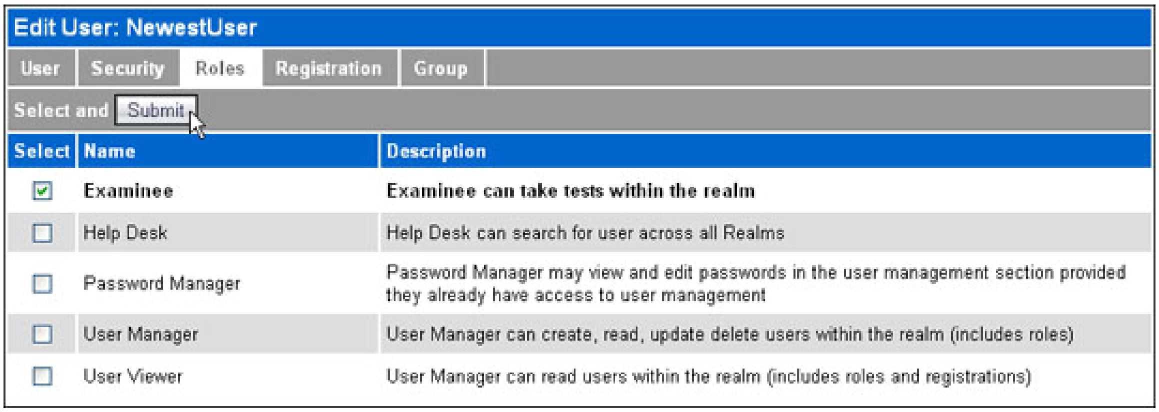
You will automatically advance to the "Roles" tab.

Roles tab

The roles tab allows you to designate the level of access for each user account. The available roles will be displayed for you.

Please note that for security reasons, users cannot assign additional roles they do not already have. Users also may or may not have permissions to assign one or more of the roles they have been assigned. (e.g., a Manager role may not be able to create a new Manager role user.)

Mark the checkboxes to select one or more of the user roles.

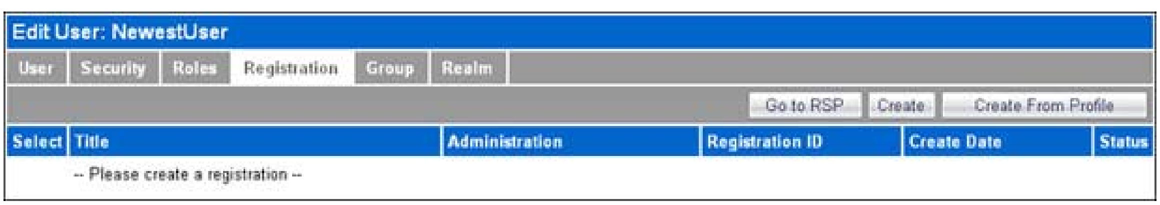


- **NOTE**: If you plan to use the Registration tab (as described below) to launch the RSP and register or schedule a user for an exam, you must assign the Examinee user role to this user.

When you are finished selecting user roles, you must click **Submit** to save your data. You will automatically advance to the "Registration" tab where you can continue setting up the user account.

Registration tab

From here, you can register and schedule users for test assessment Titles, and/or authorize or unauthorize tests if your realm has been configured to require proctor authorization to launch a test. Depending on the type of test that was launched, you can get an Instant Score Report after a user has completed the assessment.



By default, there are no additional registration attributes or characteristics other than the steps described below. However, Realm Managers may configure these attributes and other requested information if desired. You may be asked to enter other information as part of your registration process.

- For more information on customizing registration attributes, refer to the topic on *Attribute Management*.

REGISTER USERS FOR ASSESSMENTS

If your realm is set up to automatically register new users for assessments, or the batch-load user data was configured to register users for any specified assessments, those registrations will be listed for you when you click the Registration tab.

If your realm has *not* been configured to pre-register candidates for assessments, or the batch-load registration process failed, you will need to register your candidates manually.

There are three ways to register users for an assessment. Choose one of the following three methods.

- Option 1: "Go to RSP" to access the Registration/Schedule/Payment application.
- Option 2: "Create" a list of registered titles from a list of individually selected titles.
- Option 3: "Create From Profile" a list of registered titles from a list of pre-selected titles.

Option 1: "Go to RSP" to access the Registration/Schedule/Payment application

(**NOTE**: If you do not have user rights to access the RSP, this option will not be available.)

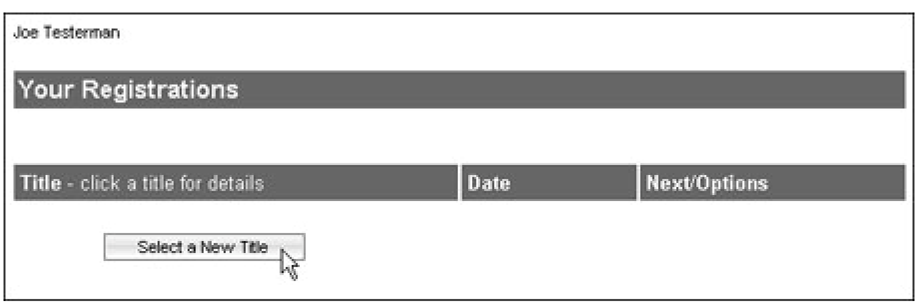
From the Registration tab, click the **Go to RSP** button.

This will launch the RSP application in a separate window, logging you into the user's account as though you were the examinee, though all activity will be logged under your name.

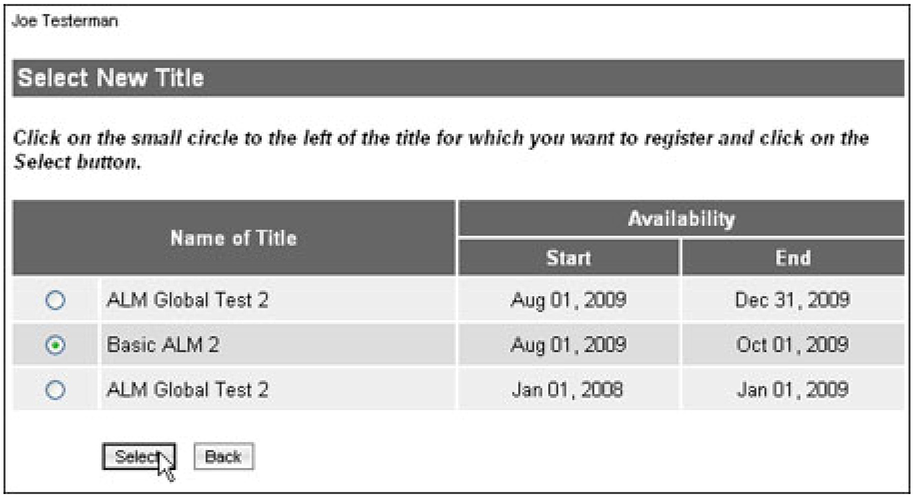
- *Please note that examinees are typically expected to log into the RSP directly and register themselves for the exams. There should not be a frequent need to register users this way.*

A partial view is shown below.

Click **Select a New Title**.



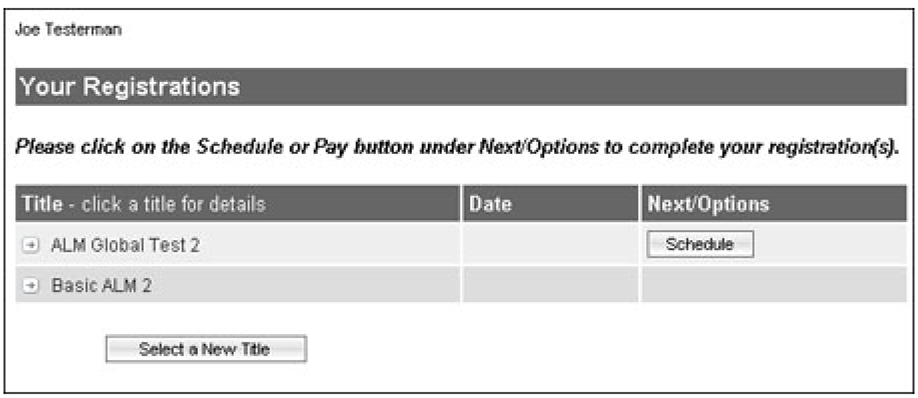
The Titles available for registration will be displayed. Click the radio button next to the Name of Title and on the **Select** button to register the user for that title.



(If any registration attributes have been set up and linked to the assessment, next you will be asked to fill those in and click **Submit** when you are finished.)

This will return you to the list of registered titles within the RSP application. If you wish to register the user for more titles, repeat the steps by selecting the next available title.

When you are finished with registration, your registered titles will be displayed.



If you are required to schedule one or more of the assessments (as shown in the example above), you may continue using RSP to schedule the registered Title at this time.

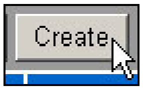
- Refer to the next section for the continuation on how to "Schedule users for assessments."

Or, click **Log Out** in the RSP application window and close it to return to the VTC Admin Console.

Click the **Registration tab** to display the newly registered title(s).

Option 2: "Create" a list of registered titles from a list of individually selected titles

From the Registration tab, click the **Create** button.



Mark the checkbox next to the Title(s) you wish to register the user for and click **Submit**.

(If any registration attributes have been set up and linked to the assessment, you will be asked to fill those in and click **Submit** when you are finished.)

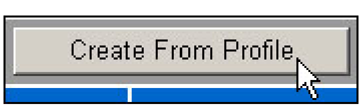
You will be asked to confirm each of the selected registrations on separate screens where the registrant information will be displayed. Click the **Submit** button to confirm each registration or the **Cancel** button to indicate you do not wish to register the user for the registration.

When you are finished, the titles you submitted will be added to the user's list of registered assessments under the Registration tab.

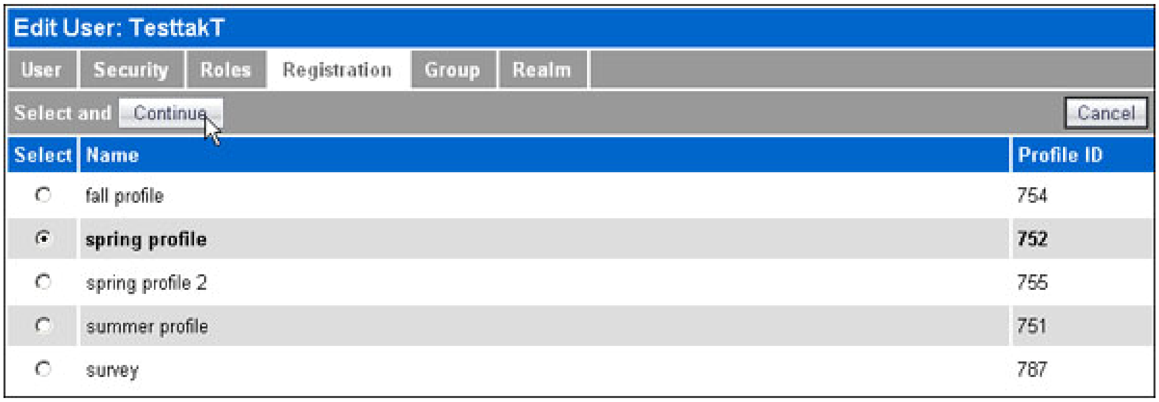
- Refer to the next section for the continuation on how to "Schedule users for assessments."

Option 3: "Create From Profile" a list of registered titles from a list of pre-selected titles

From the Registration tab, click the **Create from Profile** button.



Mark the checkbox next to the profile you wish to register the user for and click **Continue**.



All of the Title(s) that are available for registration will be displayed. The ones set up as part of the profile you selected will already be marked for you. If you wish, you may change the selected checkboxes next to the title names.

If you are satisfied with your selections, click the **Submit** button.

You will be asked to confirm each of the selected registrations on separate screens where the registrant information will be displayed. Click the **Submit** button to confirm each registration or the **Cancel** button to indicate you do not wish to register the user for the registration.

(If any registration attributes have been set up and linked to the assessment, you will also be asked to fill those in and click **Save Changes** when you are finished.)

The titles will be added to the user's list of registered assessments under the Registration tab.

- Refer to the next section for the continuation on how to "Schedule users for assessments."

SCHEDULE USERS FOR ASSESSMENTS

Once the examinee is registered for at least one title, and scheduling is required, he or she must be scheduled for the exam. If self-scheduling is allowed, examinees can log onto the RSP application to schedule the exam and arrange payment (if a test fee is required). Or, VTC staff assigned to the User Manager role can make the arrangements for the examinee by clicking "Go to RSP."

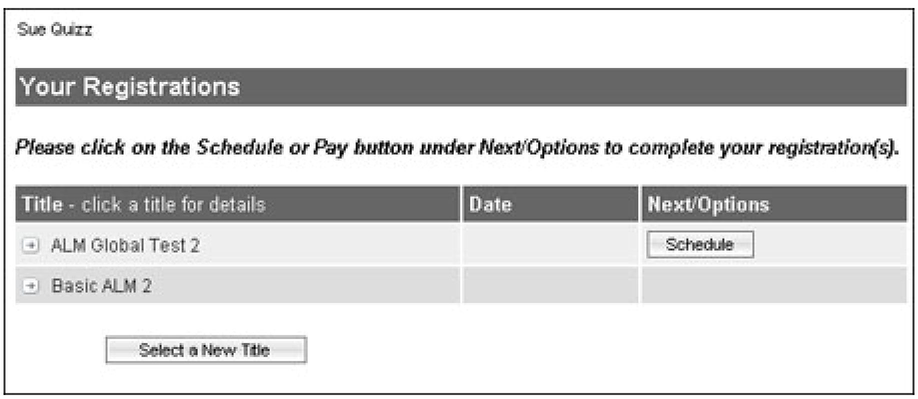
If you wish to schedule users for the assessments using the RSP application, select the user account you wish to edit.

Click the **Registration tab** to display the user's registered test titles.

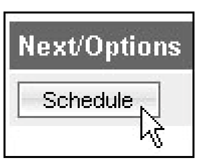
Click the **Go to RSP** button.

(**NOTE**: If you do not have user rights to access the RSP, this option will not be available.)

This will launch the RSP application in a separate window. The registered title(s) will be displayed for you. Titles requiring scheduling will be indicated by a "Schedule" button.

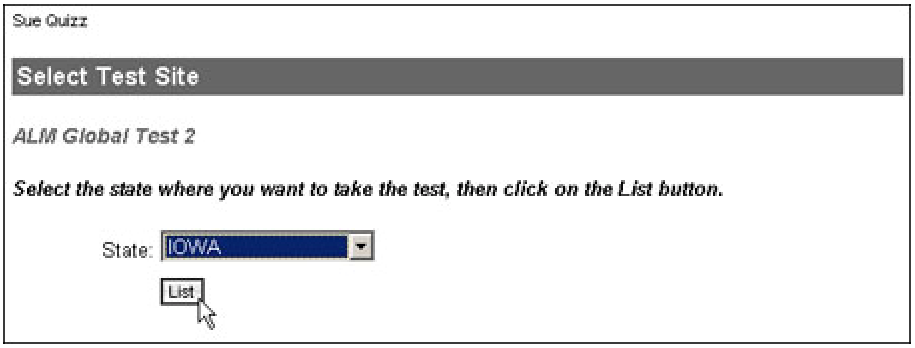


Click the **Schedule** button.



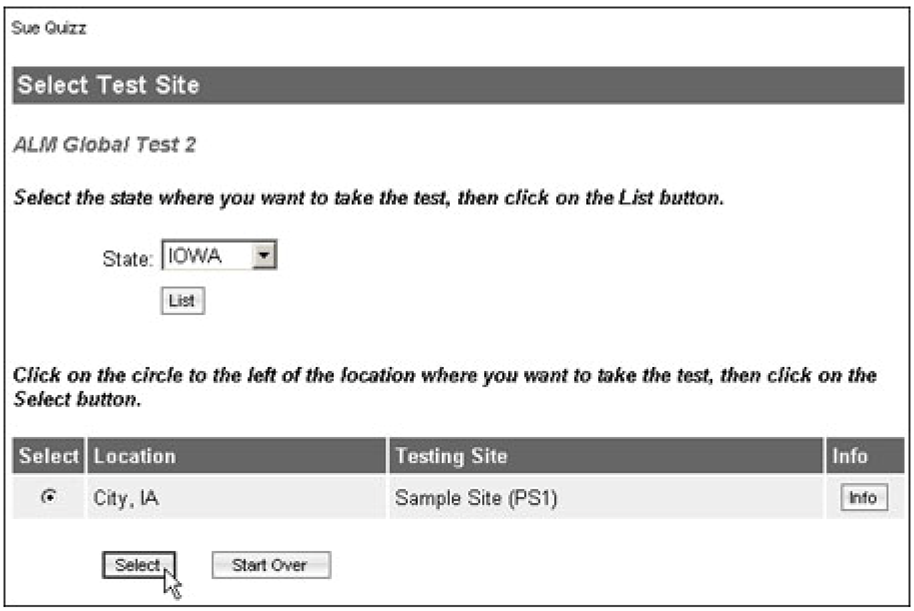
Your next step will be to select the state where the examinee will take the test.

Click the drop-down button to select the state, then on the **List** button.



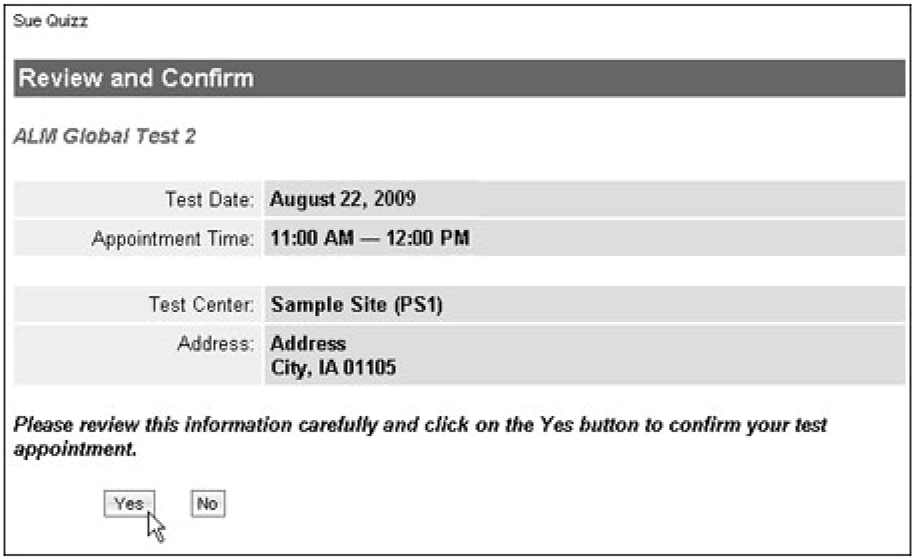
A list of test centers in the state you selected will be displayed. (Click the **Info** button to get information on the testing site to verify it is the location you are looking for.)

When you have found the location you want, click the radio button in the select column. Click the **Select** button.



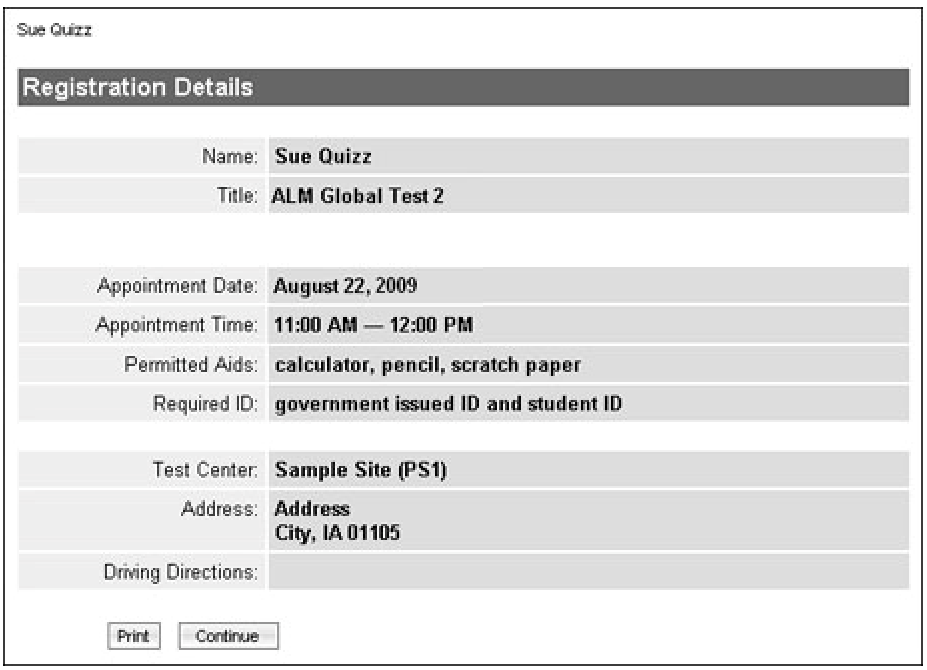
Continue selecting other scheduling characteristics as needed, such as the month, date, and time of the examinee's appointment. When you are finished, you will be asked to review your selections and confirm the appointment.

Click **Yes** if you are satisfied (or **No** to reschedule the appointment.)



A registration and schedule summary will be shown. Click **Print** to give a copy of the information to the examinee.

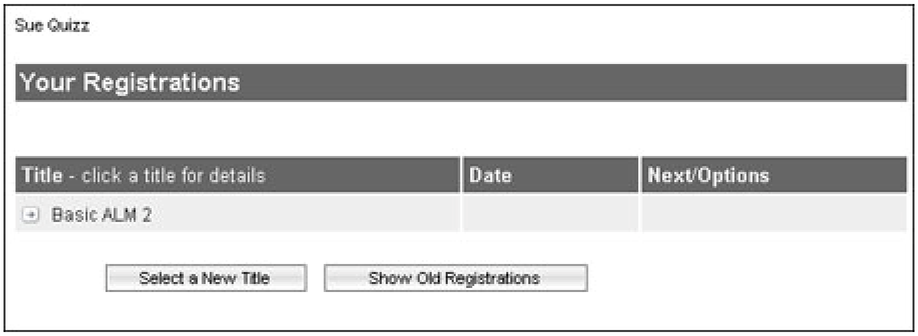
Click **Continue** to go on.



This will return you to the main menu of the RSP application which will show the status for all titles, registration, scheduling, and payment for each assessment assigned to the user. Continue scheduling assessments if any remain.

Click **Select a New Title** if you need to register the user for any additional titles.

- *Please note that examinees are typically expected to log into the RSP directly and register themselves for the exams.*



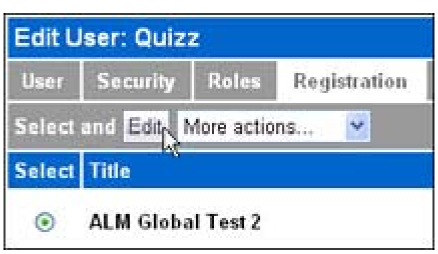
When you are finished with the RSP application, click **Log Out** in the RSP application window and close it to return to the VTC Admin Console.

MANAGE REGISTERED ASSESSMENTS

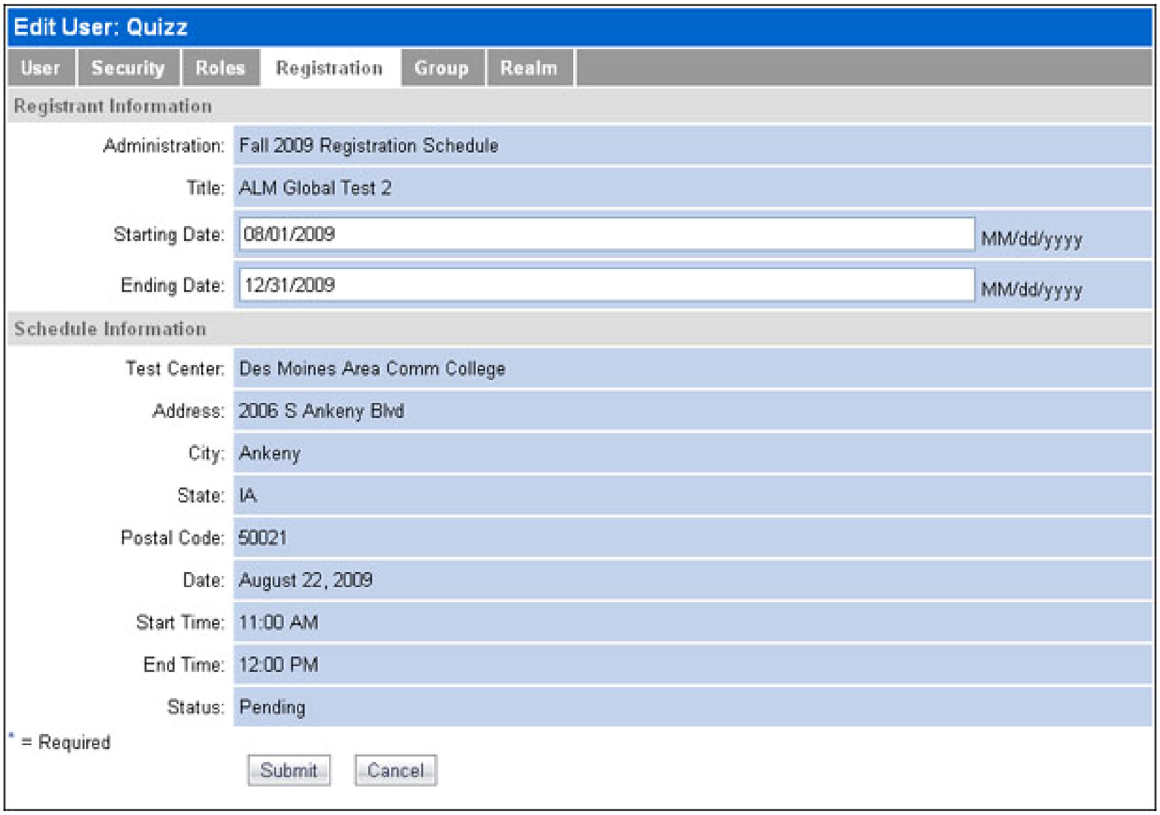
Once an examinee is registered for an assessment (either automatically or manually), the user's registration status will be displayed in the "Status" column, as well as any additional comments (shown in the example below).

Edit: Edit selected assessment characteristics for a user's registered assessments.

Select the radio button next to the test title. Click the **Edit** button. (If the registered assessment status is "completed", you will not be able to edit data.)



Modify or enter the test administration dates (the time frame in which time the examinee must come in to take the test.) If a user has been scheduled for a session, that information will be included as shown in the example below.



- Depending on the type of title that was selected, other fields such as Score Report and Extended Time fields may also be available. Select the parameters for those fields at this time.

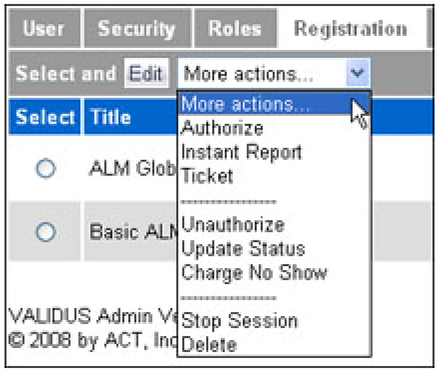
Click **Submit** when you are finished to return to the list of registered assessments.

More actions... (Registration tab drop-down list): First select the radio button next to the assessment you wish to act on.

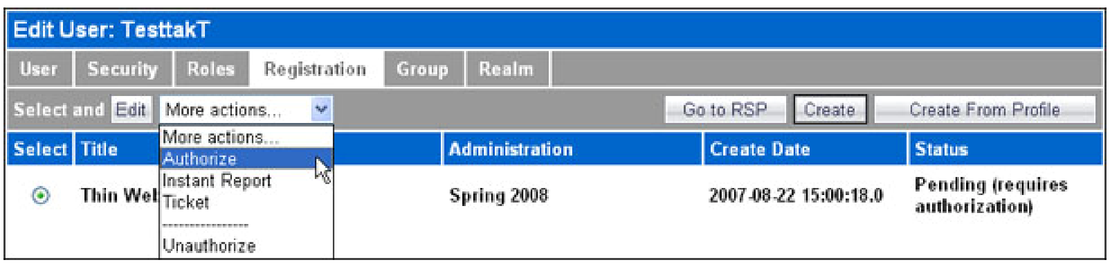
Then select one of following commands from the drop-down box.

Depending on the type of assessments and status of the assessments that the user is registered for, the available command list may vary.

- Authorize
- Instant Report
- Ticket
- Unauthorize
- Update Status
- Charge No Show
- Stop Session
- Delete



Authorize: If an assessment has been set up as a proctor-authorized launch, a proctor or user with proctor access must first select the **Authorize** command for that Title before an examinee can launch the assessment. Authorization lasts for 30 minutes during which the examinee must begin the test or the proctor must re-authorize the Title.

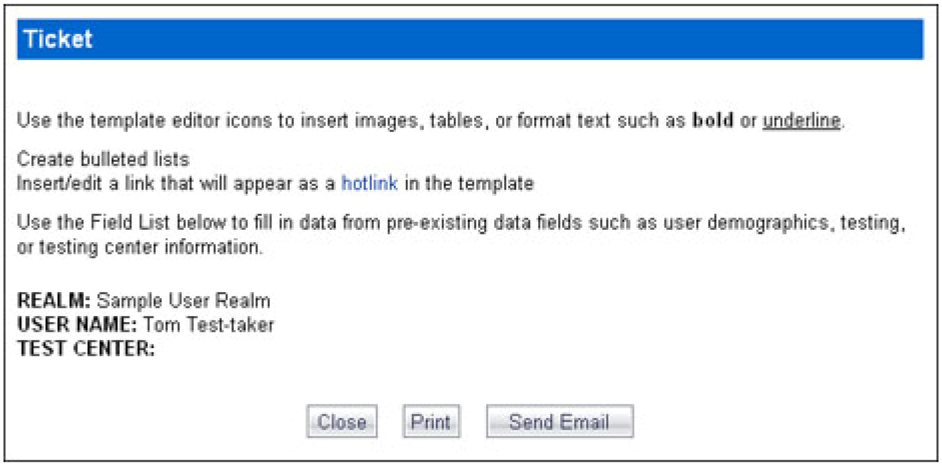


Instant Report: Once a user has *completed* the assessment, select the **Instant Report** command. A separate pop-up window will display the report.

To print the report, right-click in the report window and choose **Print** from the menu. Follow the print dialog box instructions to select a printer and output preferences. Close the pop-up window when you are finished.

Ticket: Once a user has been registered for the assessment, the **Ticket** command will generate information that can be emailed or printed and given to the candidate, if a template has been set up and assigned to the assessment. The ticket will typically contain details the candidate will need before coming in to take the test.

Click the **Ticket** option from the drop-down box. If a ticket has been set up, the contents will be displayed in a separate pop-up window. (Formatting may vary slightly from the actual email, but the contents remain the same.)



Click **Print** to print the information for the candidate or for your own records.
Click **Send Email** to email the information to the candidate's email address, stored in the user profile.
Click **Close** if you do not wish to print or email the ticket information, or when you are finished with the Ticket window.

- Ticket templates must be created in *Realm Management* using the Templates tab, and assigned to the assessment under *Assessment Management*. Refer to those topics for further details.

Unauthorize: If a test has been authorized by mistake, or you decide you do NOT want to authorize the exam, repeat the procedure for Authorize except select the **Unauthorize** command.

Update Status: This task button only applies to surveys. For a survey with status of "In Progress", you can change it to "In Progress - Reset Eligibility" or "Complete". For a "Complete" survey, you can only change the status back to "In Progress". You cannot update status on a "Pending" survey.

Charge No Show: If an examinee doesn't show up for the scheduled test, and the assessment was set up for no show charging, you have the option of charging the fee for the test.

Stop Session: If an examination session needs to be interrupted (e.g., a hung workstation or session, evidence of misconduct during exam, etc.) the **Stop Session** command will halt or "kill" the existing session. This will prevent the examinee from continuing or relaunching the session.

Delete: Remove a Title from the user's registration list by selecting the **Delete** command. A pop-up box will display. Read the message carefully before confirming your choice. Click **OK** to delete the selected registration and return to the updated list.

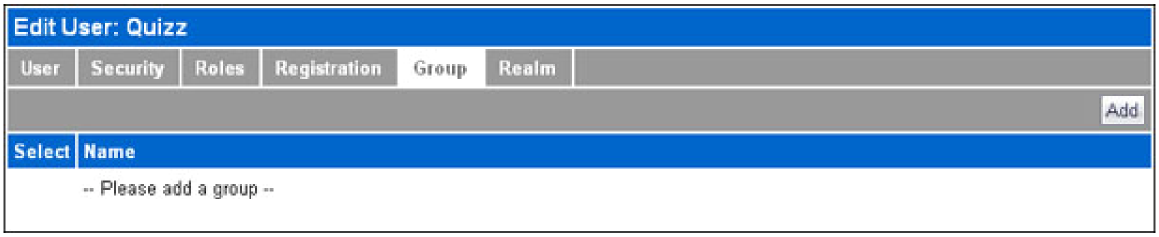
NOTE: You cannot delete a registration record once the test has been scheduled or launched.

After you are finished registering users for assessments, click the **Group** tab if you wish to assign the user to one or more group of users. This will make it easier for a proctor to authorize many users for the same examination at one time.

Group tab

Assigning users to Groups enables a proctor to authorize more than one user exam at a time or contact users by email. Groups are especially helpful for sites that have many examinees that will all require proctor authorization to launch an assessment.

- **NOTE**: Groups are created in *Group Management*. If none have been created, you may skip this step and add the user to a group at another time.



Add: To assign a user to a group, click **Add** to select a group or groups from the group selection list.

Mark the checkbox next to each group name. Click **Add** again when you are ready to go on.

The group(s) you assigned will be listed for you.

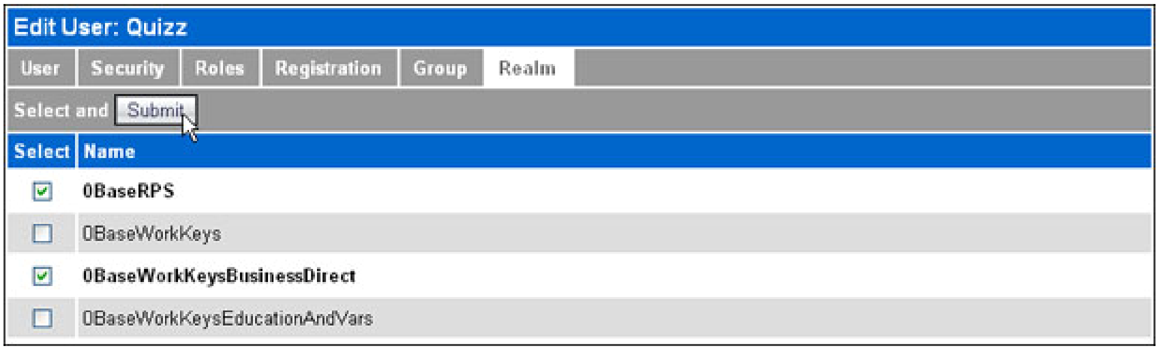
Remove: If you wish to remove a user from a group, click the radio button next to the assigned group. Click **Remove**.

Click the **Realm** tab if you wish to assign the user to additional realms.

Realm tab

Enable user login access to more than one realm.

The current realm is selected by default. Mark the checkboxes to indicate other realms you wish to assign to the user.



Click **Submit** to assign the user to the realm(s) you selected and return to the User Management main menu.

Back to [Table of Contents]

User Batch Load

User Role Access: Ultra User, Validus Registration Loader, Validus Registration Loader Admin, Validus Registration Loader Manager; Program Manager may be added to one of the Loader roles

- *The Program Manager role controls program-level priority escalation for batch files. It must be assigned in conjunction with one of the Validus Registration Loader roles to be activated.*
- *The Validus Registration Loader role only has access to view and manage the files they have uploaded.*
- *The Validus Registration Manager Loader role has access to view and manage all batch load user files; controls realm-level escalation for batch files.*
- *The Validus Registration Loader Admin role can view and manage batch files uploaded by any other user in the realm; does not include file escalation.*

Users with access to User Batch Load may upload a comma-delimited data file to create user records that are pre-populated with data. You may also auto-register examinees for a test when you batch load the file to the system and/or assign records to a group of users.

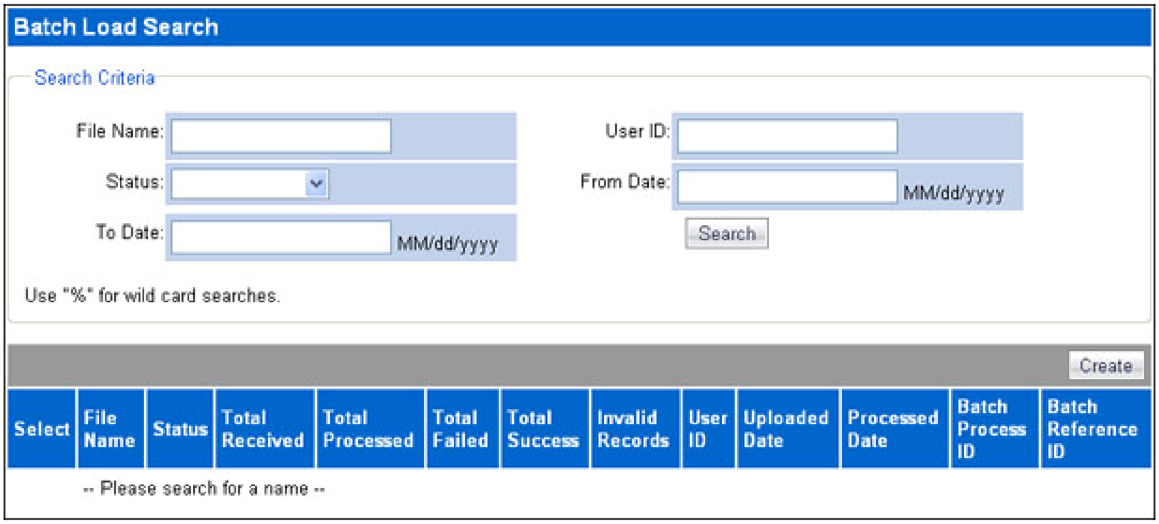
Once records have been batch loaded, you may also search for the batch load files, check processing status, and correct any errors that may have occurred.

WARNING: Before changing any data at your realm, be sure that all User Batch Load files have finished processing. Any file already in progress will continue processing while the new settings take effect and may cause the file processing to fail.

- Create a batch file
- Upload a batch file
- Batch Load search
- More Actions...
    - Download Uploaded File
    - Download Invalid Rows File
    - Download Log File
    - View Processing
    - Escalate File (within Realm / Program / System)
- Troubleshooting Batch Files

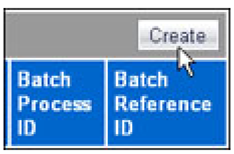
Click **User Batch Load** from the main menu to begin.

This brings you to the Batch Load Search page.

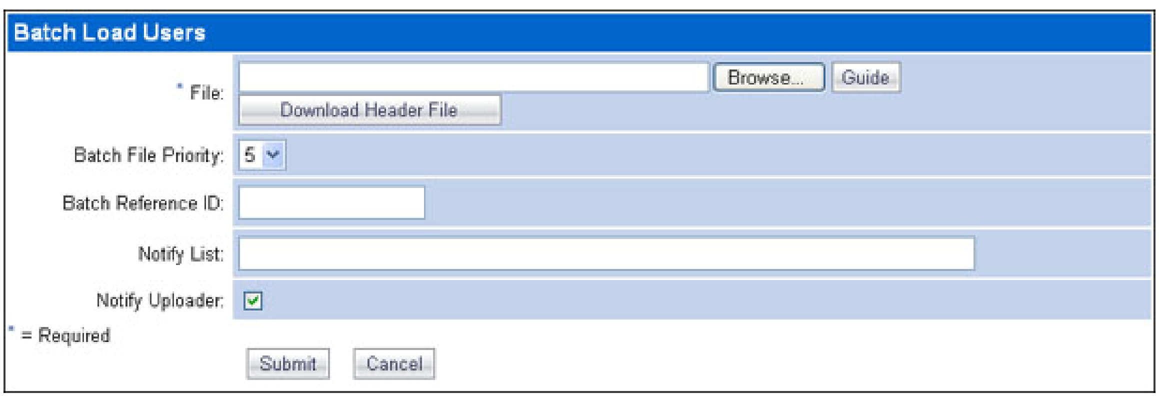


Create a batch file

Click the **Create** button to upload your file.



This brings you to the **Batch Load Users** page.



If you have not created a file to upload, you need to download a template you can use to create a user record file.

Click **Download Header File** to download a commented CSV file similar to the one shown below. (The headers in the CSV file may vary based on the attributes, assessments, groups, etc. that have been defined for the realm.)

Click to **Save** the file to a location on your network or hard drive, or click to **Open** it using a CSV file editing tool such as Microsoft® Excel®.

- **Excel users**: See Appendix A: Handling CSV Files for more information about creating and handling CSV files in Excel.

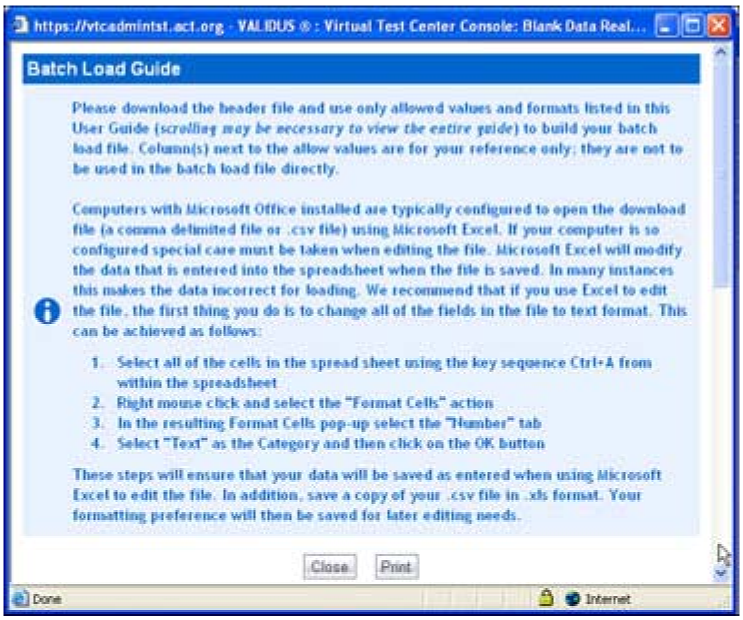
	A	B	C	D	E	F
1	firstName	lastName	email	FavoriteColor	userName	password
2						
3						
4						
5						

- *You may use any CSV file editor to display and generate CSV header files.*

Click the **Guide** button in VTC to identify the characteristics and attribute parameters in use by your realm.

The Batch Load Guide will open in a separate pop-up window as shown below.

- Be sure to scroll past the instructions that appear at the top of the Guide window.



You can print the Guide by clicking the **Print** button. Click **Close** when you are finished.

Use the information in the Guide to help you enter data in the CSV header file as shown in the Excel example below.

	A	B	C	D	E	F
1	firstName	lastName	email	FavoriteColor	userName	passworc
2	record	one	one@emai	color1	oneoneone	passworc
3	record	two	two@emai	color2	twotwotwo	passworc
4	record	three	three@em	color3	threethreet	passworc
5	record	four	four@emai	color4	fourfourfou	passworc

Records containing data errors in any field will cause a failure during batch load. This will prevent your file from being imported to the system. Therefore:

BEFORE YOU CREATE YOUR BATCH FILE, please read the following notes to help minimize batch load errors.

- All columns that are included in the file are automatically processed during upload. If your realm requires certain user data, those columns must be filled in. You cannot upload a blank column that is marked as required data.

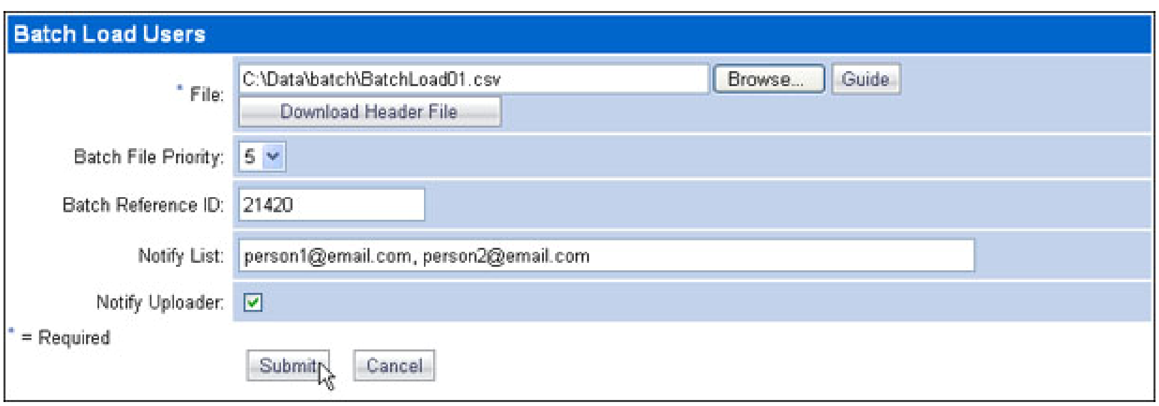
  For example, if registrations are required and you are not registering users for an assessment during batch load, you would need to remove all registration columns (assessmentId, eligibilityStart, eligibilityEnd, etc.) and any associated registration attribute columns.

  NOTE: Unless "Batch Load Strict Required Validation" has been turned on for your realm, Batch processing cannot enforce validation of required fields if the column is not included in the batch file. If you remove required fields so the batch file can be processed, you will need to manually update the user record at a later time.
- If you have auto-registration turned on for your realm, do not *also* register users using User Batch Load. (See the Realm details tab in the *Create a New Realm* topic for more information.)
- If your realm has restricted the Batch Loader from updating existing user records, only new accounts may be created via the Batch Loader. Loading a user record with firstName and lastName columns that match an existing user record will cause the Batch Load file to fail. (See the Realm details tab in the *Create a New Realm* topic for more information.)
- **Excel users**: See Appendix A: Handling CSV Files for more information about creating and handling CSV files in Excel.

Please note that file size may affect the order in which jobs are processed. Files smaller than 150KB will be placed in the work queue ahead of larger files to ensure fast processing. However, this will not affect the priority of the job once the system begins processing a file.

Upload a batch file

When you are ready to upload the file you created, return to the **Batch Load Users** page.



Notify List: If you would like to send notifications to others via automated email during the batch file processing, enter email addresses separated by a comma in the text entry field. (e.g., address1@email.com, address2@email.com, address3@email.com.)

Users on the list will receive three notification emails:

1. When the batch load file has been uploaded and received for processing.
2. When the system begins to process the file.
3. When the system has completed processing. This final notification email will indicate success or failure, as well as a list of record error indicators if a failure occurred during the batch load process. (This information may be found in the Log File.)

Batch Reference ID: If you are uploading a file that you wish to link to a previously uploaded batch file (example if your first attempt failed and you are uploading a corrected file), enter the original Batch Reference ID number in the text entry field. (You can find the Batch Reference ID listed on the Batch User Load main page once a batch file has been loaded.) This number can be used at a later date to identify data being pulled from the system. **NOTE**: If you need to upload the same, corrected file multiple times, be sure to reference the original file so that all subsequent uploads refer to the same Batch Reference ID.

File: Next, click **Browse** to find the location of the CSV file you wish to upload. When you have selected it, either double-click the filename or click **Open** to populate the File field.

Batch File Priority: Users with administrative access can set the priority of the batch file. Numbers range from 1-9, with 9 being the lowest priority in the queue. The default is typically 5 for "normal" processing time. If the batch load is not an immediate priority, use the drop-down box to set the priority down to 9. If processing a file is critical, set the priority higher than 5. If files come to the queue at the same priority level they will be handled in the order they are received.

Notify Uploader: If you would like to be notified via automated email when the file is being processed and when processing is complete (which will include a list of errors indicating any failures that may have occurred), mark the **Notify Uploader** checkbox.

You will receive emails #2 and #3 from the Notify List above.

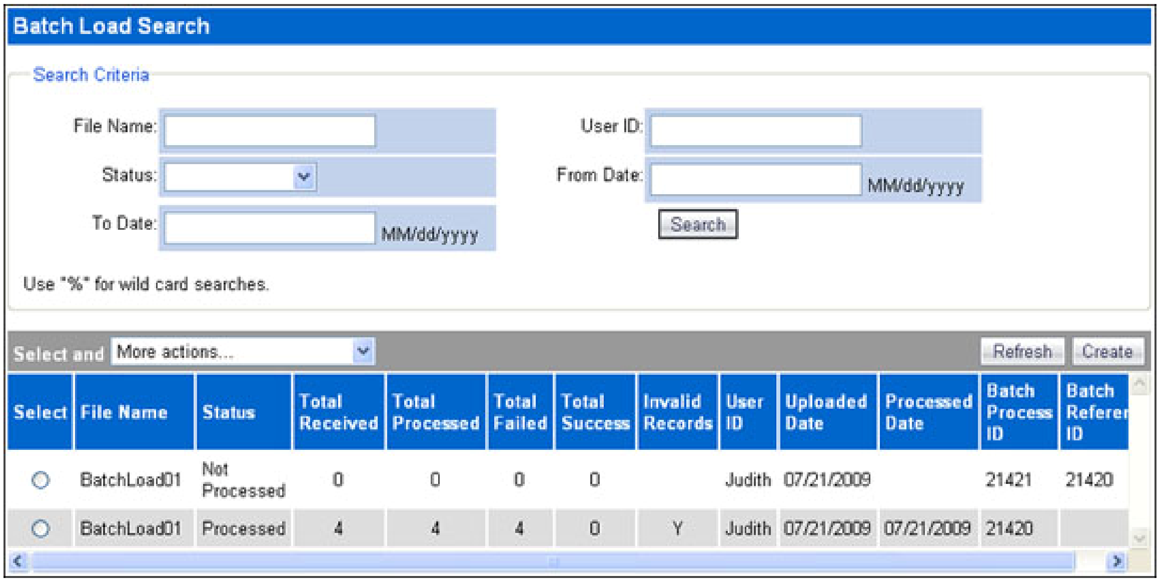
These emails will be sent to the email address in your user account. If you would like notifications sent to a different email address than the one on file, use the Notify List field.

If you do not wish to be notified, do not check the box.

NOTE: The notification system may occasionally send out duplicate emails. Please ignore them if this occurs; the batch file will only be processed one time.

Click **Submit** when you are ready.

You will now return to the Batch Load Search page. Your uploaded Batch file will be displayed along with the status, upload date, and process date. (Once processing is complete, the status is changed to Processed.) You should receive a confirmation email that your batch file has been received, is being processed, and when it is completed.



Batch Load search

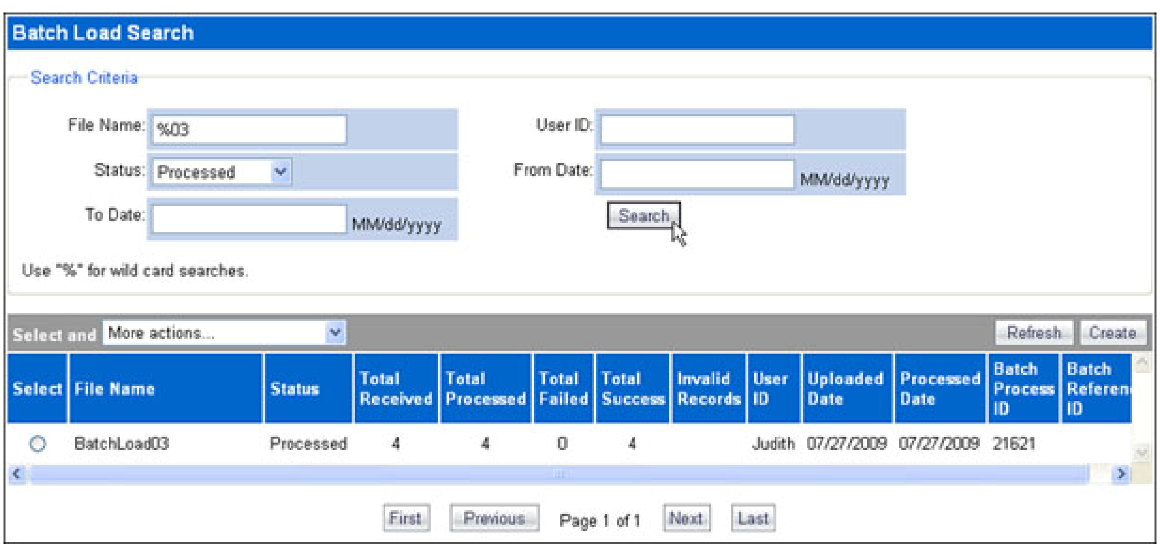
Once batch files have been loaded, they are stored for that realm for a period of time specified by the realm's System Manager. Using Batch Load Search, you may search for previously uploaded files that are currently being stored.

Using the search screen you may download uploaded files, check the file for errors, manage a loaded file, and verify whether a file has been processed.

Use one or more of the following criteria to begin your search or leave all fields blank to display all available batch load files.

Use the % sign as a wild card character to enter any part of the File Name or User ID. Use the drop-down box to select the Status, or enter a Date range that the batch file was loaded.

When you have made your selections, click **Search**.



The results will be displayed below the search fields as shown above.

Use the scrollbar located at the side and bottom of the screen to view all of the data in the table.

Click the column header to sort by column.

More Actions... (drop-down box)

- Download Uploaded File
- Download Invalid Rows File
- Download Log File
- View Processing
- Escalate File (within Realm / Program / System)

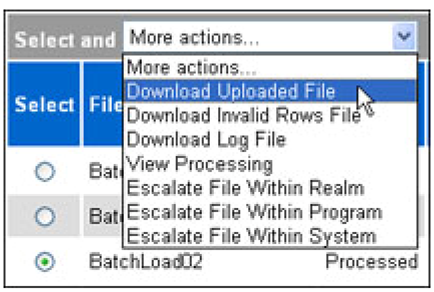
Download or View a Batch File

DOWNLOAD UPLOADED FILE

After a file has been processed, you may **Download** the **Uploaded File** and save it to a new location to be stored or upload it to a different realm (assuming that realm also uses the same headers, user record and registration parameters.)

Click the radio button to select your Batch Load file name.

Next, use the **More Actions...** drop-down box and select **Download Uploaded File**.



Click to **Save** the file to a location on your network or hard drive.

Or, click to **Open** it and view the records in a CSV file editing tool such as Microsoft Excel.

- **Excel users**: see Appendix A: Handling CSV Files for more information about creating and handling CSV files in Excel.

You may also print or save your records using the commands in the CSV editor. Close the CSV window when you are finished to return to the VTC Console.

Check Batch File for Errors

After a file has been processed, the processing data for all records is stored in a log file.

Any invalid records that are detected during the batch file upload can be found in the log file, which will specify the error(s) found in each row.

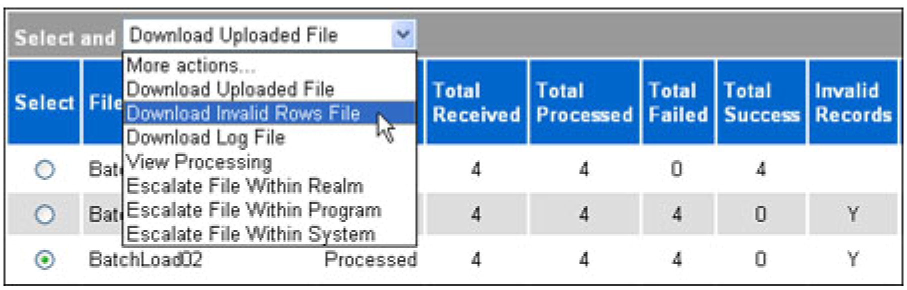
Use the information in the **Invalid Rows** file in conjunction with the **Log File** to identify and correct any errors in the batch file before saving and re-uploading the records.

DOWNLOAD INVALID ROWS FILE

If a processed file contained invalid records, it will be marked with a **Y** in the "Invalid Records" column. To view the rows of data that contained errors (valid, successfully loaded rows will not be shown), click the radio button next to the batch file with the error.

Click the radio button to select your Batch Load file name.

Next, use the **More Actions...** drop-down box and select **Download Invalid Rows File**.



Click to **Save** the file to a location on your network or hard drive, or click to **Open** it and view the records in a CSV file editing tool such as Microsoft Excel.

Download and check the Log File (see instructions below) to determine what the error was and how to correct it.

Correct the errors in the Invalid Rows File. Then save and upload the file, referencing the original Batch Reference ID during upload.

After doing so, verify that the newly uploaded file no longer displays a **Y** in the Invalid Records column.

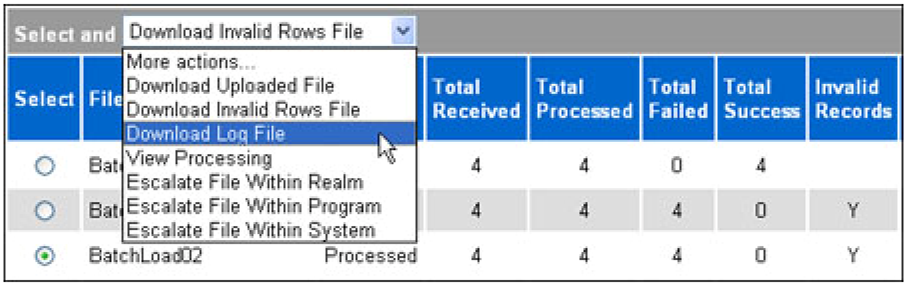
- **NOTE**: If you continue making corrections and uploading the same file, use the first Batch Reference ID for all subsequent uploads.

DOWNLOAD LOG FILE

After a file has been processed, you may view the log file history of how data was processed for each record. If you received a notification email of the batch process completion, this processing data is also sent via email.

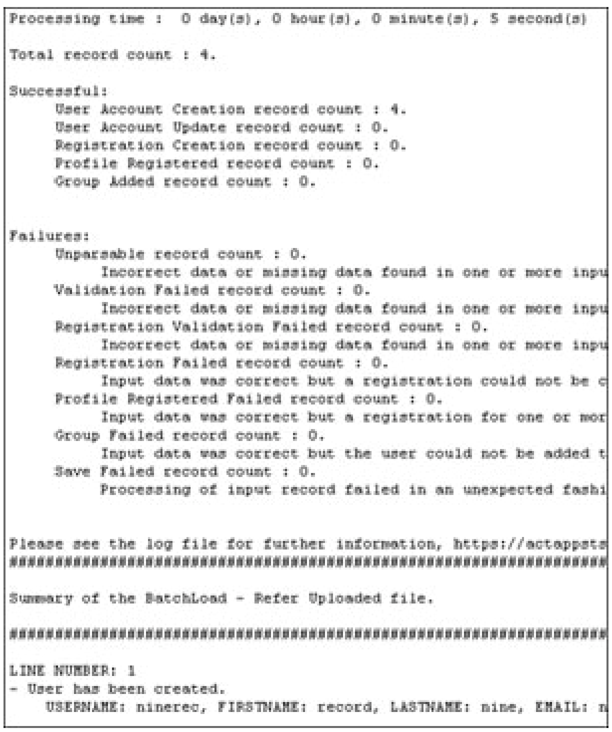
Click the radio button to select your Batch Load file.

Next, use the **More Actions...** drop-down box and select **Download Log File**.



Click to **Save** the .log file to a location on your network or hard drive, or click to **Open** it and view the file. (If you do not have an application assigned to open it, use any .txt file reader such as Notepad.)

Successes, failures, and record counts for each category will be indicated for you in the log file as shown in the example below.



```
Processing time :  0 day(s), 0 hour(s), 0 minute(s), 5 second(s)

Total record count : 4.

Successful:
     User Account Creation record count : 4.
     User Account Update record count : 0.
     Registration Creation record count : 0.
     Profile Registered record count : 0.
     Group Added record count : 0.


Failures:
     Unparsable record count : 0.
          Incorrect data or missing data found in one or more inpu
     Validation Failed record count : 0.
          Incorrect data or missing data found in one or more inpu
     Registration Validation Failed record count : 0.
          Incorrect data or missing data found in one or more inpu
     Registration Failed record count : 0.
          Input data was correct but a registration could not be c
     Profile Registered Failed record count : 0.
          Input data was correct but a registration for one or mor
     Group Failed record count : 0.
          Input data was correct but the user could not be added t
     Save Failed record count : 0.
          Processing of input record failed in an unexpected fashi


Please see the log file for further information, https://actappsts
##################################################################

Summary of the BatchLoad - Refer Uploaded file.

##################################################################

LINE NUMBER: 1
- User has been created.
    USERNAME: ninerec, FIRSTNAME: record, LASTNAME: nine, EMAIL: n
```

Failures Category Message	Possible Reason For Error	How to Correct It
Unparsable record – Incorrect data or missing data found in one or more input record fields.	Incorrect punctuation or other unallowed character in file (e.g., spaces, < >). List items are separated by anything other than a single comma (including double commas or a tab.) Empty data in required field. Use of double-quotes in the file's data.	Download the Batch Load guide; check that the user data follows the allowed values on file for your realm. Fill in all required data fields; delete required columns if you are not using them. If header was removed, verify header and comma were deleted correctly. If you need to use quotations, use single-quotes only.
Validation Failed – Incorrect data or missing data found in one or more input record fields.	User data entered in the file was not in the correct format. Did not match parameters specified for your realm.	Download the Batch Load guide; check that the user data follows the allowed values on file for your realm (e.g., Username, password in proper format, etc.).
Registration Validation Failed – Incorrect data or missing data found in one or more input record fields.	User data and dates were valid, but the registration data was invalid. Could not register user.	Download the Batch Load guide; check that the assessment registration data follows the allowed values on file for your realm.
Registration Failed – Input data was correct but a registration could not be created for the user in the system.	The user data and registration data in the batch file are valid, but system registration failed.	Check that the assessments in the system are set up correctly so that users may be registered (e.g., expired registration windows, registration or schedule limits, etc.).
Profile Registered Failed – Input data was correct but a registration for one or more tests defined in the profile could not be created for the user in the system.	User data is in the correct format, but did not match the parameters specified by your realm.	Download the Batch Load guide; check that the profile registration data follows the allowed values on file for your realm (e.g., Profile ID).
Group Failed – Input data was correct but the user could not be added to the specified Validus Group.	User data is in the correct format, but did not match the parameters specified by your realm.	Download the Batch Load guide; check that the group registration data follows the allowed values on file for your realm (e.g., Group ID).
Save Failed – Processing of input record failed in an unexpected fashion.	User data may or may not pass all criteria. Experiencing database issues.	A system processing error occurred during upload. Try again later.

Once you verify what type of failure has occurred, download and check the Invalid Rows File (see instructions above) to find and correct the errors in the specific records or rows in the file. Then you will save and reprocess the incorrect rows that caused the initial failure.

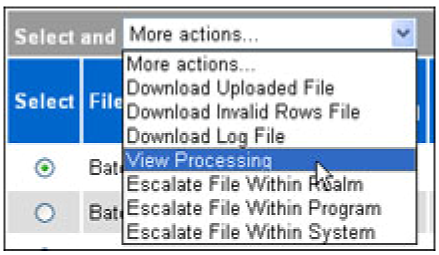
Manage Batch Processing

VIEW PROCESSING

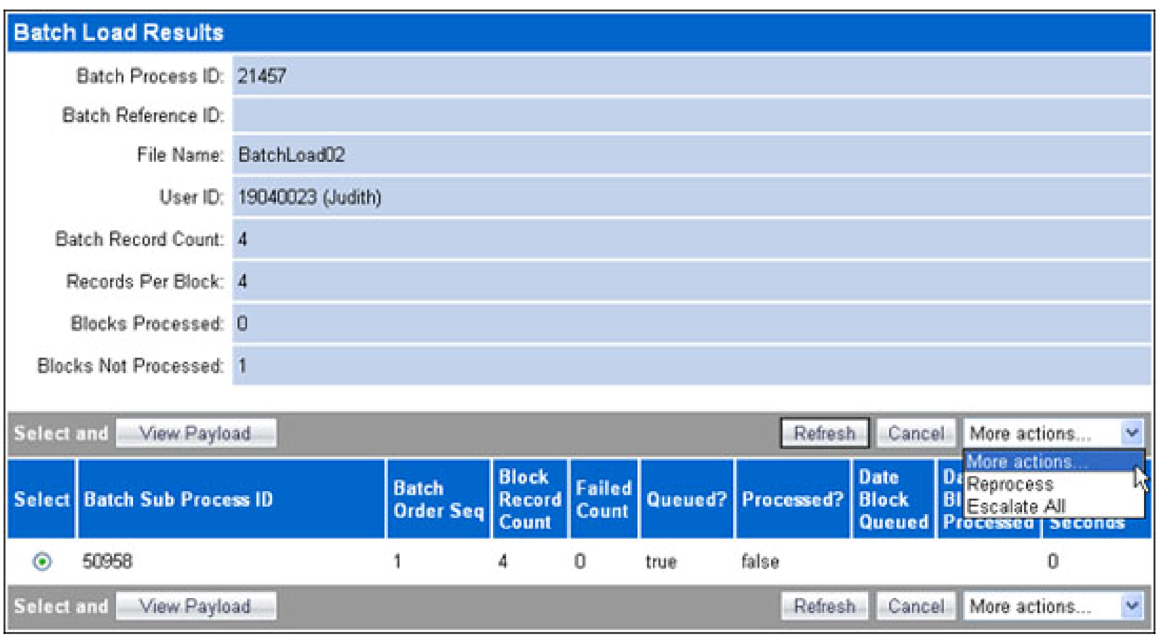
If the status column of the User Batch Load page lists your file as "In Process", you may view processing details about the file before processing has completed.

Click the radio button to select your Batch Load file.

Next, use the **More Actions...** drop-down box and select **View Processing**.



This will tell you what is currently being processed and if there are any errors in progress.



- *Please note the Batch Order Sequence column does not necessarily reflect the order the order the record appears in your file.*

View Payload: Users with administrative access can view the data being returned while the sub processes are running. It is a way to determine if everything is running smoothly. Data from the Payload file will be stored in the Log File once the batch load file has been processed.

To View Payload, select the radio button next to the Batch Sub Process ID you wish to view. Click **View Payload**. You will be asked whether you want to **Open** or **Save** your .txt file. Click **Open** to see the statistics from sub process for the file in progress. The processed payload files are in XML format.

If the payload file is blank, be sure the processed flag for the sub process ID is 'true' indicating the sub process is finished or there will be no processing data to view.

Refresh: Click **Refresh** to update the screen as records are being processed. Once the file is finished processing, you will be returned to the main User Batch Load page.

More Actions... Reprocess: If a record fails or hangs during initial processing, users with administrative access have the option to send the record back through for reprocessing before the Batch Load file is complete.

Click the radio button next to the record you wish to reprocess. Use the **More Actions...** drop-down box and select **Reprocess**.

NOTE: This does not guarantee that the file will process correctly the second time. However, if there was a momentary system hang, or the file has ceased to process, the file will be sent back through the queue. If errors continue, check the file data.

More Actions... Escalate All: Similar to Escalate File within the System on the main User Batch Load page (described below), users with administrative access can boost the processing time for all records in the Batch Load file.

Use the **More Actions...** drop-down box and select **Escalate All**.

When you are finished, click **Cancel** to return to the User Batch Load page.

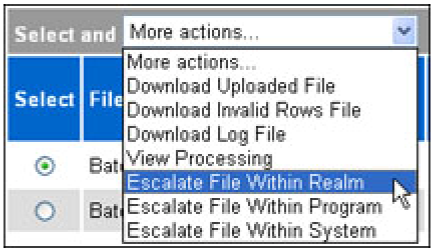
ESCALATE FILE

Users with administrative access can set the priority level for batch files during upload on a scale of 1-9. If there are multiple files in the queue, lower numbers are processed ahead of other files with a higher number. The default setting for all files is 5. Typically, there should not be a need to alter these numbers and all files in the queue will be processed when they are received. Batch files with the same priority level are handled in the queue on a first come, first served basis.

However, if there is a need to rush a particular file that is in process, it is possible to "escalate" the file's processing time within the Realm, Program, or System.

Click the radio button to select your Batch Load file.

Next, use the **More Actions...** drop-down box and (depending where you need to escalate the file's processing status) select **Escalate File Within Realm/Program/System**.



Escalating a file within the Realm will bump a file to the top of your realm's list of batch processing files. Escalating a file within the Program will put the file ahead of all other realm's files connected to your program, and choosing System will put the processing ahead of all other files in the queue.

- **NOTE**: This option should be used sparingly as it is not possible to rush all files to the top of the queue at the same time.

Troubleshooting Batch Files

- Please note that depending on your User Role you may only have access to the batch files you uploaded.
- Your User ID and role may also affect your ability to view batch files and records.

  To properly locate batch files and uploaded user records, *you must log into VTC Admin with same User ID in the exact case that it was created in the system*. In other words, if your ID was created "LastFirst0123", and L and F are uppercase, you will need to log on using uppercase letters. Logging on "lastfirst0123" or any other combination may cause the batch loaded files or user records not to appear on the main Batch Load screen or on the User Management pages even though they have been successfully loaded.

  If you have successfully loaded files without receiving an error message, but they do not appear on the Batch Load page even after pressing the refresh button, please find the correct form of your User ID by clicking **My Account** from the main menu. Log out and log back in using the correct User ID.
- If your realm settings require specific attribute fields and/or that those attributes fields must be filled in, your file will fail the validation check if it does not meet those requirements.
- Excel users: If you are still having trouble with your Batch Load file, be sure to read Appendix A: Handling of CSV Files for more information.

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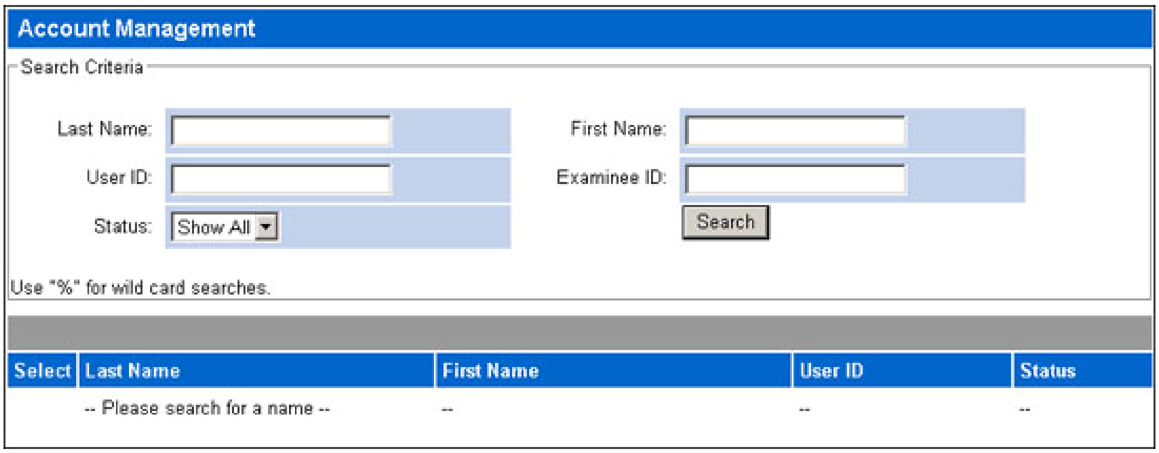
Account Management

User Role Access: Ultra User, Account Manager

Click **Account Management** from the main menu to search for a user account to view, reset user passwords, and monitor or change the account status.

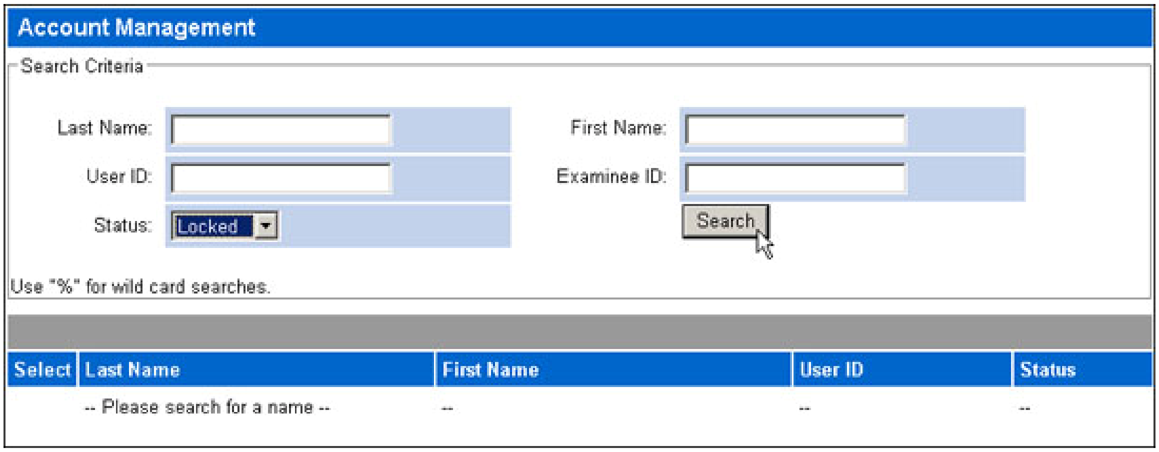


- Search for an account
- Change account status
- Reset account password

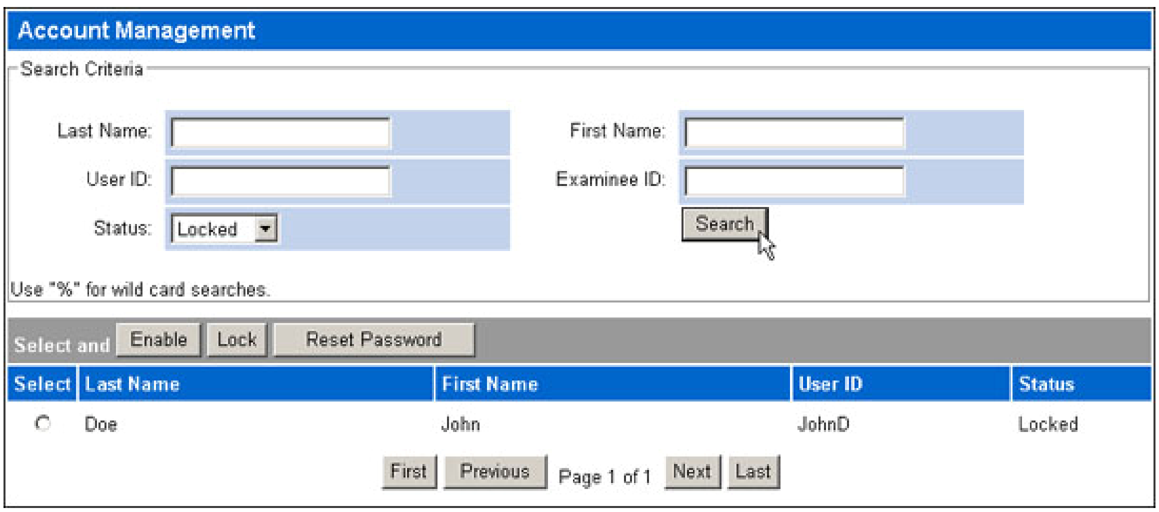
Search for an account

If you do not know the exact user you are looking for, use the % sign as a wild card character to enter any part of the last name, first name, User ID, and/or Examinee ID in the search criteria fields. (Or, you may leave the search fields blank to display all users.) You may also use the status drop-down box to find enabled, disabled, or locked accounts, or select "Show All" to display users of any status.

Make your criteria selections and click the **Search** button.



The search results, including the user's first and last name, user ID, and account status will be displayed beneath the search criteria in the lower frame.



If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

- If there are too many pages of results and you are having trouble locating the user account you want, narrow your search criteria and try again.

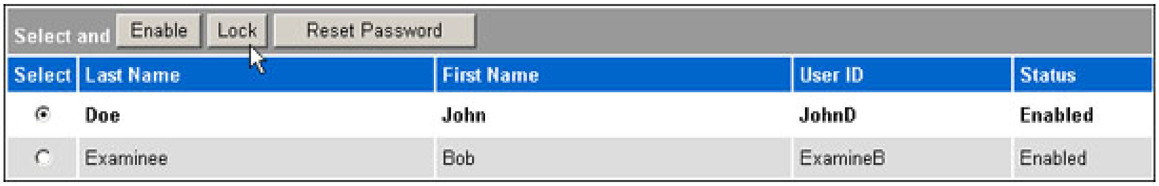
Change account status

You can use this feature to lock a user account to prevent a user from logging in. You can also enable a previously locked account. Users who tried unsuccessfully to log on more than five times will have their account disabled automatically; you can use this feature to enable the account.

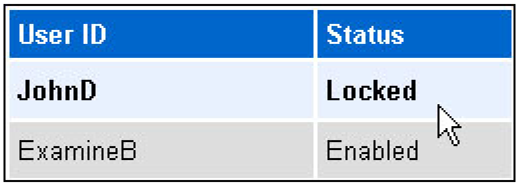
To change the status of a user account, you must first perform a search to find the user record you wish to modify.

Once the user record is displayed in the search results, select the radio button next to the user's name.

Click the **Lock** or **Enable** button, located above the user list.



The user's status will be updated and displayed in the "Status" column.



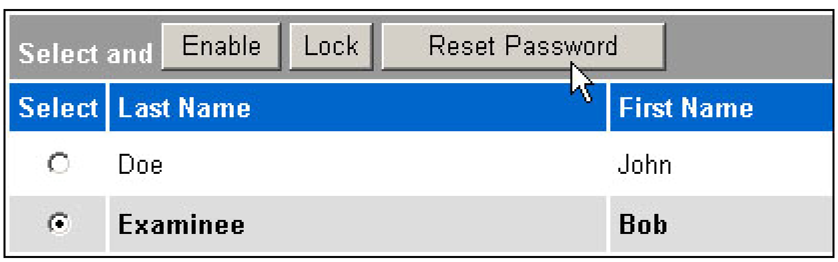
Reset account password

Reset the account password for users who have forgotten their password. If an account was auto-disabled due to repeated unsuccessful logins, you should also reset the account password.

To reset the account password, you must first perform a search to find the user record you wish to modify.

Once the user record is displayed in the search results, select the radio button next to the user's name.

Click the **Reset Password** button located above the user list to reset the password.



A new password will be generated and automatically sent to the email address on file in the user's record.

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Group Management

User Role Access: Ultra User, Proctor, User Manager

- *The Proctor role can only perform proctor-related tasks (such as register examinees for a group, email a group of examinees, or authorize/unauthorize examinees for an assessment). They cannot create, edit, or delete groups.*

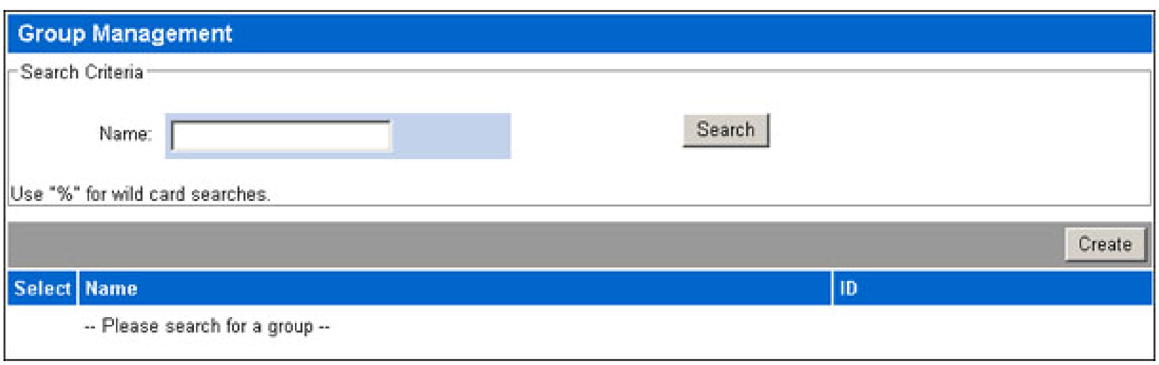
If your realm requires proctor authorization before the examinee can launch an assessment, and you have a lot of users who will need to launch proctor-authorized assessments, you can assign those users to a group and authorize the launch for all users in the group.

Groups are created in *Group Management*. Users may be assigned to those groups in large numbers using the *Group Management* menu option, or individually under *User Management*. Similarly, *Group Management* is used to authorize or unauthorize large numbers of examinees at one time. You would use *User Management* to authorize each user individually at the time of the exam.

- For additional information about how to require proctor authorization for each assessment, please refer "Edit an assessment" in the *Assessment Management* topic.

Click **Group Management** from the main menu to search for and manage an existing group or create a new group.

- **NOTE**: If you do not plan to send email to groups of users, or to require proctor authorization to launch assessments, you will not need to create groups.



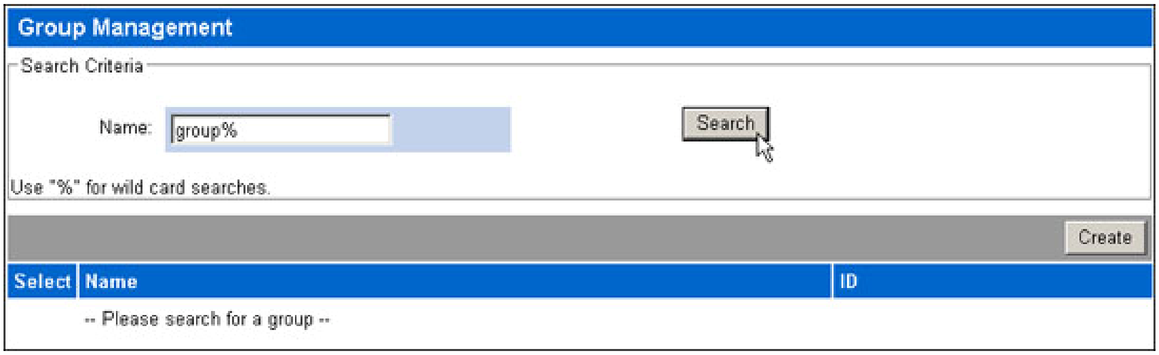
- Search for a group
- Edit a group
- Authorize or Unauthorize a group
- Email a group
- Register a group
- Delete a group

See also: Create a New Group

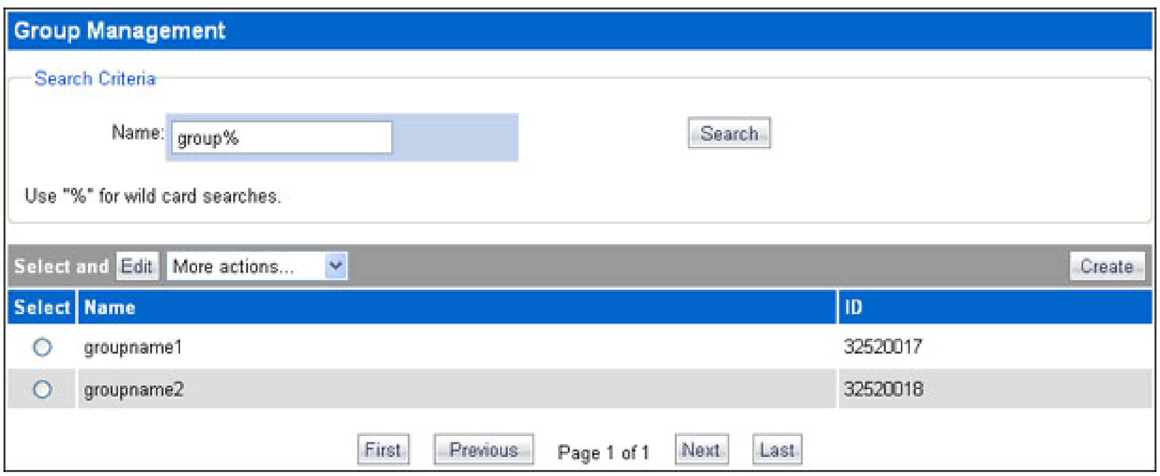
Search for a group

If you do not know the exact group name you are looking for, use the % sign as a wild card character to enter any part of the group name in the search criteria field. (Or, you may leave the field blank to display all groups.)

Make your criteria selections and click the **Search** button.



The search results will be displayed beneath the search criteria in the lower frame.



If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

- If there are too many pages of results and you are having trouble locating the group you want, narrow your search criteria and try again.

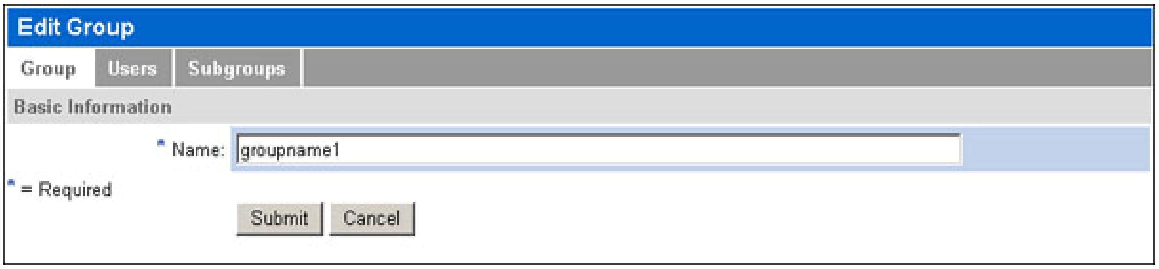
Edit a group

To edit a group, you must first perform a search to find the group you wish to modify.

Once the group is displayed in the search results, select the radio button next to the group's name.

Click the **Edit** button, located above the group list.

There are three tabs of information associated with each group. They are labeled "Group," "Users," and "Subgroups." Click the tab titles to view the stored data. The Group tab is shown below.



- For detailed information about the data fields in each tab, please refer to the topic *Create a New Group*.

Authorize or Unauthorize a group

To Authorize or Unauthorize a group of users, you must first perform a search to find the group you wish to act on.

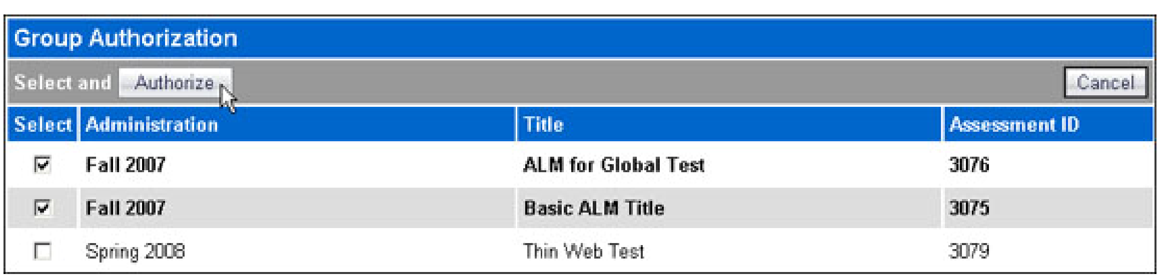
Once the group is displayed in the search results, select the radio button next to the group's name.

Use the drop-down box located above the group list to select **Authorize** or **Unauthorize**.

- If there are no assessments requiring authorization, a message will display to and you will be unable complete the process. Click **Cancel** to return to the group list.

If there are assessments to authorize/unauthorize, mark the checkbox next to the title you wish to act on.

Click the button, **Authorize** or **Unauthorize**, as appropriate.



This will return you to the list of groups.

NOTE: Authorization only lasts for 30 minutes. During this time the examinee(s) must begin the test, or the proctor will need to re-authorize the assessment.

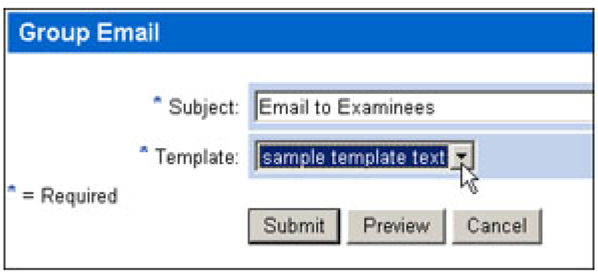
Email a group

To send an email to a group of users, you must first perform a search to find the group you wish to contact.

Once the group is displayed in the search results, select the radio button next to the group's name.

Use the drop-down box located above the group list to select **Email**.

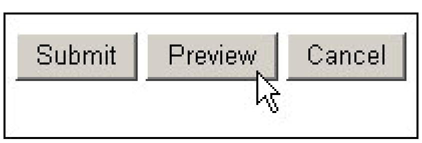
This will display the Group Email screen.



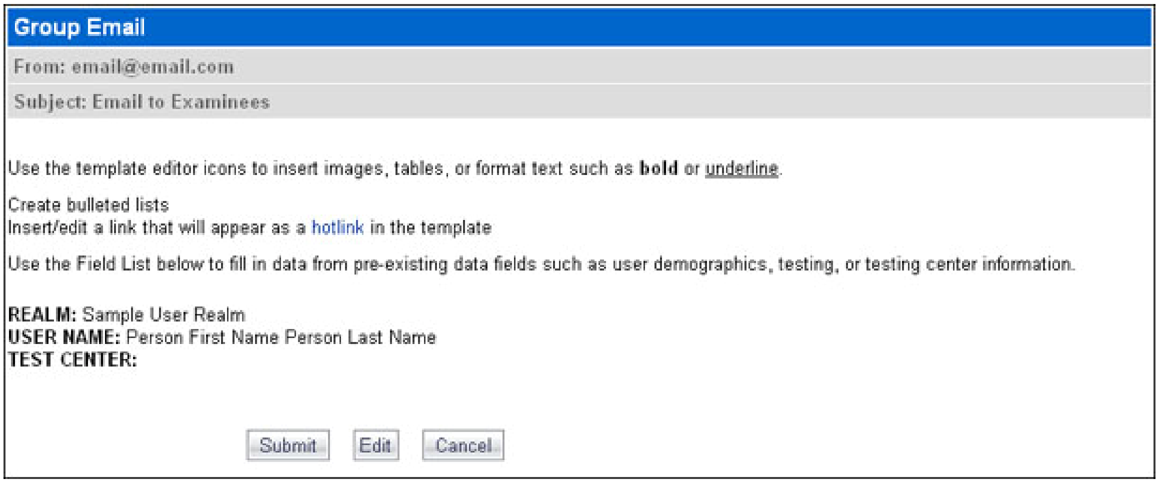
*__Subject__: Enter the subject line of your email in the Subject box.

*__Template__: Use the drop-down box to select the email template you wish to send. (If you do not have any defined templates, you cannot use this feature to send an email.)

If you are ready to send the email, click the **Submit** button. -*OR*- If you are not sure what template to use and you want to see the content of your email, click the **Preview** button instead of Submit.



Your email contents will be displayed on-screen. (Formatting may vary slightly from the actual email, but the contents remain the same.)



If you are satisfied with the email's content, click **Submit** on the Preview screen to send the email and return to the list of groups. Or, click **Edit** to return to the email editor and choose a different subject line or template.

You may also click **Cancel** to return to the group selection menu without sending the email.

- For detailed instructions about how to create or edit templates, please refer to the "Templates tab" in the *Create a New Realm* topic.

Register a group

To register a group of users for the titles, you must first perform a search to find the group you wish to register.

Once the group is displayed in the search results, select the radio button next to the group's name.

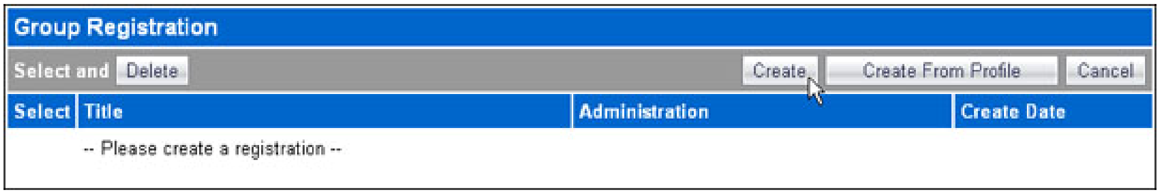
Use the drop-down box located above the group list to select **Register**.

The Group Registration page will display, listing any existing assessments the group is already registered for. If none exist, or if more are required, you have two options.

You can add registered titles individually, or, if profiles containing specific title selections have been set up using *Profile Management*, you may access registered title selections by profile.

Add registered titles individually

Click the **Create** button located to the far right side of the screen.



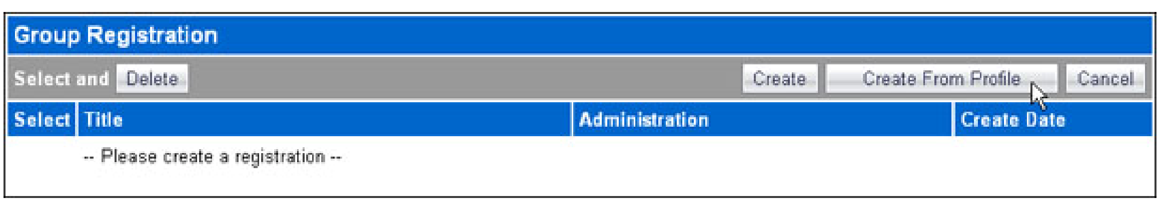
Select the checkbox next to the title or titles the group is being registered for and click the **Submit** button.

NOTE: If a title you selected has Registration Attributes attached, you will be prompted to fill those in at this time before the Group Registration is complete.

Once the registration process is complete, you will return to the Group Registration page. The group's registered titles will be displayed.

Add registered titles by profile

Click the **Create from Profile** button located to the far right side of the screen.



If profiles have been set up, they will be listed for you. Select the radio button next to the profile you want and click **Continue**.

Group Registration : Select Profile:

Select and Continue | Cancel

Select	Name	Profile ID
○	fall profile	754
○	spring profile	752
○	spring profile 2	755
○	summer profile	751
◉	**survey**	**787**

The title or titles that are part of the profile you selected will be marked for you. (If you wish, you may also select additional titles or remove preselected titles by clicking the appropriate checkboxes.)

Click **Submit** to register the group for the selected titles.

Group Registration

Select and Submit | Cancel

Select	Title	Administration	Number Remaining
☐	ALM Global Test 2	Fall 2007 Registration Schedule	6
☐	Basic ALM 2	Fall 2007 Registration no Schedule	*
☐	Thin Web Test	Spring 2008	*
☑	**Surveys**	**Summer Surveys**	*
☑	**SurveySample**	**Surveys**	*

Select and Submit | Cancel

NOTE: If a title you selected has Registration Attributes attached, you will be prompted to fill those in at this time before the Group Registration is complete.

Once the registration process is complete, you will return to the Group Registration page. The group's registered titles will be displayed.

Group Registration

Select and Delete | Create | Create From Profile | Cancel

Select	Title	Administration	Create Date
○	Surveys	Summer Surveys	2008-06-19 11:30:11.0
○	SurveySample	Surveys	2008-06-19 11:30:53.0

Remove a registered title

To delete a registered title from the Group Registration list, highlight the radio button next to the title and click **Delete**.

Delete a group

To delete a group, you must first perform a search to find the group you wish to delete.

Once the group is displayed in the search results, select the radio button next to the group's name.

Use the drop-down box located above the group list to select **Delete**.

A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected group and return to the updated list, or click **Cancel** to return to the group list without deleting.

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Create a New Group

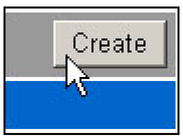
This section describes how to create a new group and also describes in detail the fields and functionality of each tab.

- Create a new group
    - Group tab
    - Users tab
    - Subgroups tab

Create a new group

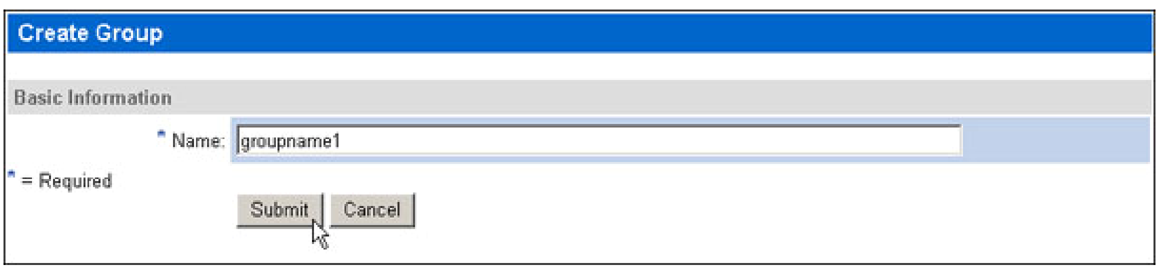
Click **Group Management** from the main menu.

Click the **Create** button located on the far right of the Group Management page.

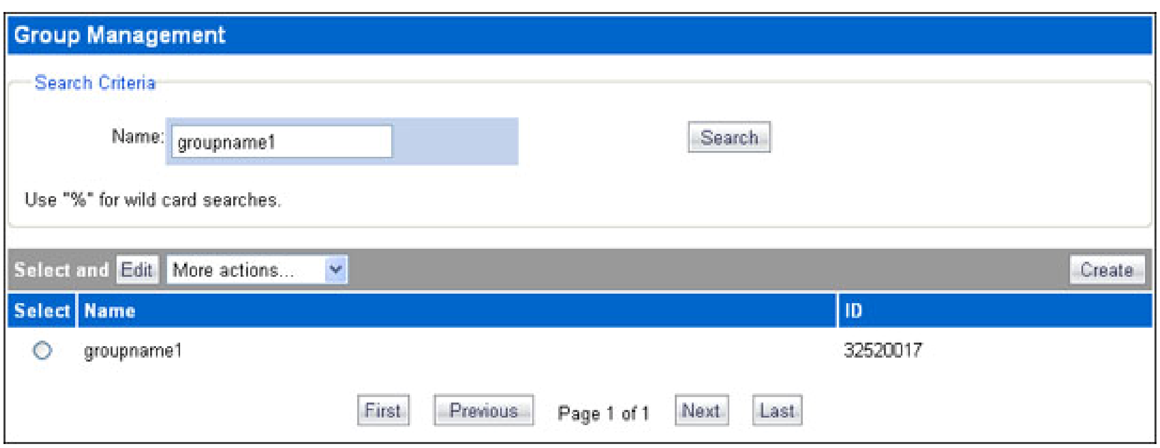


In the text entry field, enter the name of your group.

Click **Submit** to add your group and return to the Group List screen.



The new group title will automatically populate the search criteria field and will be the only group currently listed.



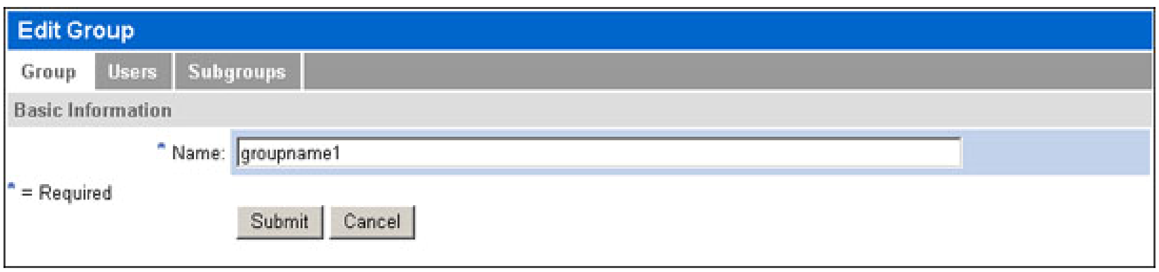
To add users or subgroups to your new group, click the radio button next to the group title.

Click the **Edit** button.

There are three tabs of information associated with each group. They are labeled "Group," "Users," and "Subgroups." Click the tab titles to view the data fields in each tab.

Group tab

The Group tab displays automatically when you click to "Edit" your group.



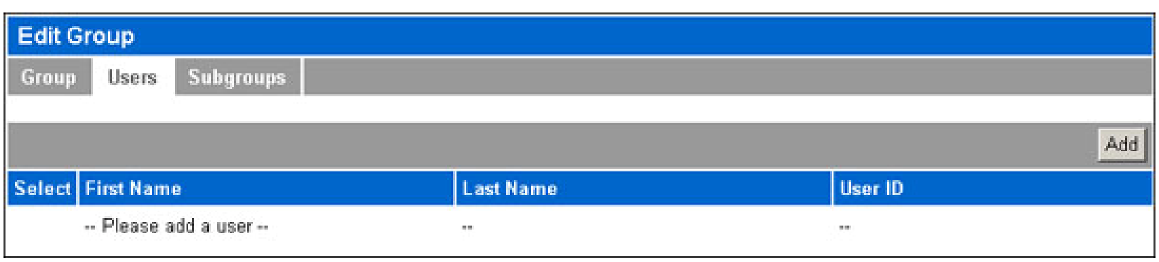
Indicates a required field.

***Name**: If you wish to change the name of your group, enter the new title in the text entry field.

If you have made changes, you must click **Submit** to save your data. You will automatically advance to the "Users" tab.

Users tab

Designate the users that are assigned to this group.



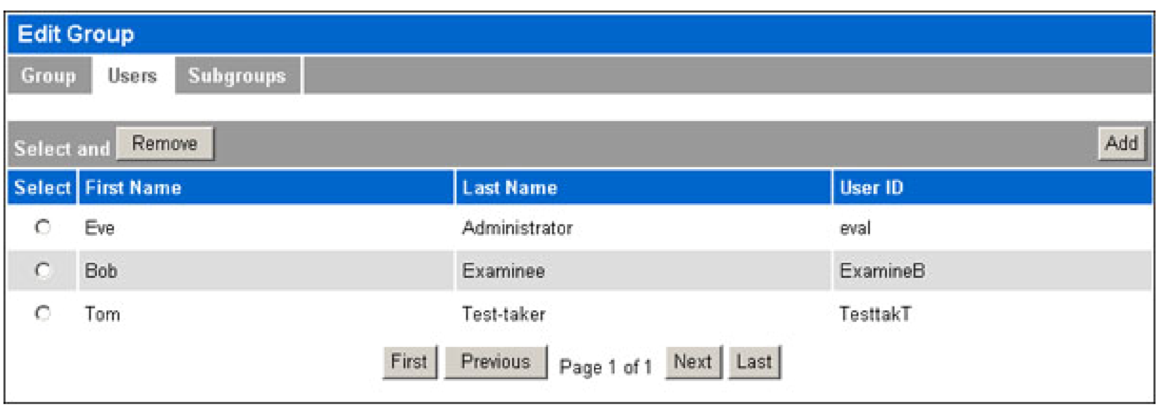
ADD USER

Click the **Add** button located on the far right of the screen.

Mark the checkbox next to the user's name to indicate which users you want to add to the group.

Click **Add** to add the users to your group.

The users you selected will be displayed for you.



REMOVE EXISTING USER

From the user list, click the radio button next to the individual's name.

Click the **Remove** button. This will remove the user name from the list.

When you are finished assigning users, click **Subgroups** if you wish to create or modify subgroups (groups within groups).

Subgroups tab

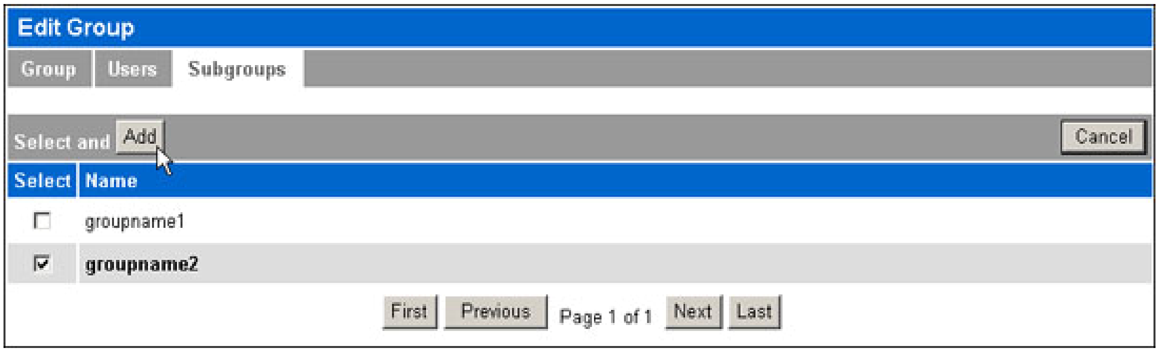
Create and manage subgroups, or groups within the group.

ADD SUBGROUP

Click the **Add** button located on the far right of the screen.

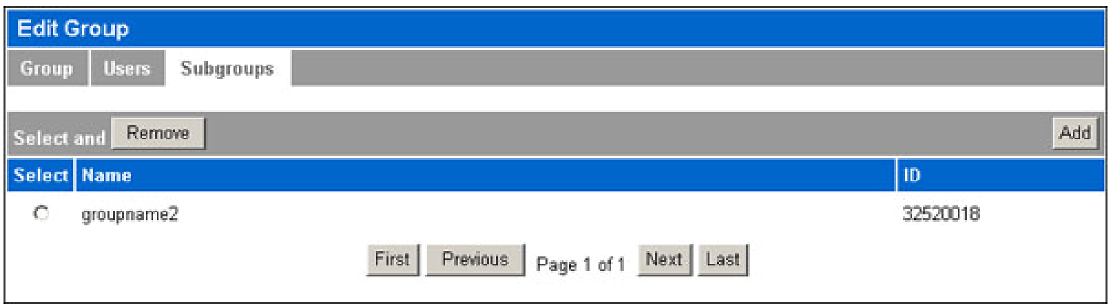
Mark the checkbox next to the group name(s) to indicate which group you want to add as a subgroup.

Click **Add** to add the subgroup(s) to your group.



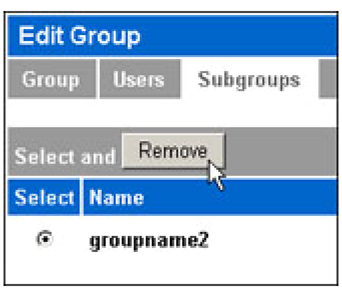
NOTE: Please be careful that you **do not add a group as a subgroup of itself**. The system does not check for cyclic definitions in subgroups either directly or through a chain of subgroups. If a group has a cyclic definition, an error will be reported when that group is used in an action.

The group or groups you selected will be listed for you.



REMOVE SUBGROUP

From the list of subgroups, click the radio button next to the group's name. Click the **Remove** button. This will remove the subgroup from the list.



After you have entered each page of information, you can review the data you have entered. Click the tab title to view the stored data.

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Profile Management

User Role Access: Ultra User, Profile Manager

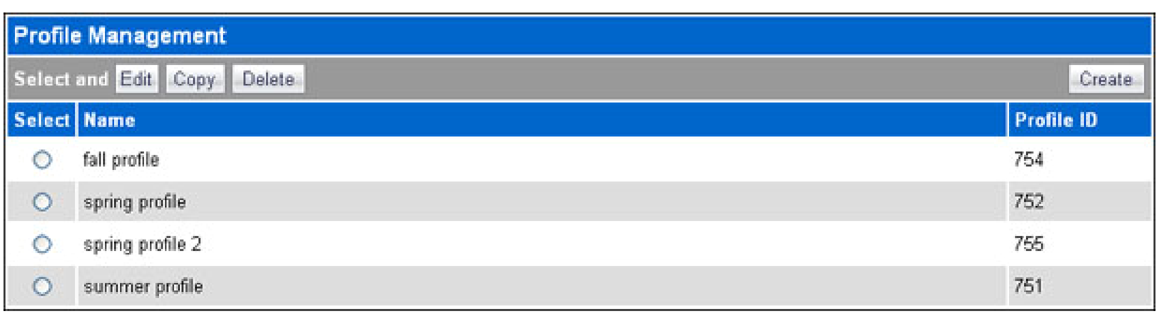
Each profile is a collection of assessments that examinees are required to take. Profiles can be set up to include the minimum score that an examinee is expected to earn on each assessment. These profile "shortcuts" are accessible in *User Management* and *Group Management* to help save time when registering users for the required assessments.

Click **Profile Management** from the main menu to set up or review profiles.

- Edit a profile
  - Profile tab
  - Assessments tab
    - Edit assessment scoring data
    - Delete assessments
    - Order of assessments
- Copy a profile
- Delete a profile

Edit a profile

Click the **Profile Management** button from the main menu. Existing profiles will be displayed for you.



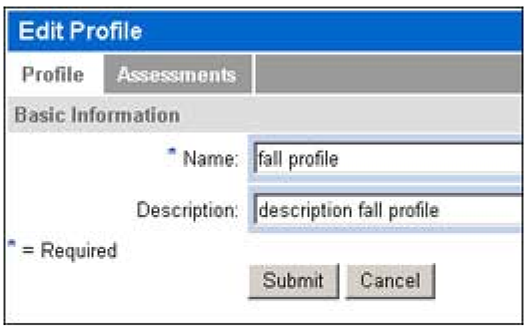
- For details on how to create a profile, see the topic *Create a New Profile*.

To edit an existing profile, select the radio button next to the profile you wish to modify.

Click the **Edit** button located above the list of profiles.

There are two tabs of information associated with each profile. They are labeled "Profile" and "Assessments." Click the tab title to view the stored data. The "Profile" tab is shown below.

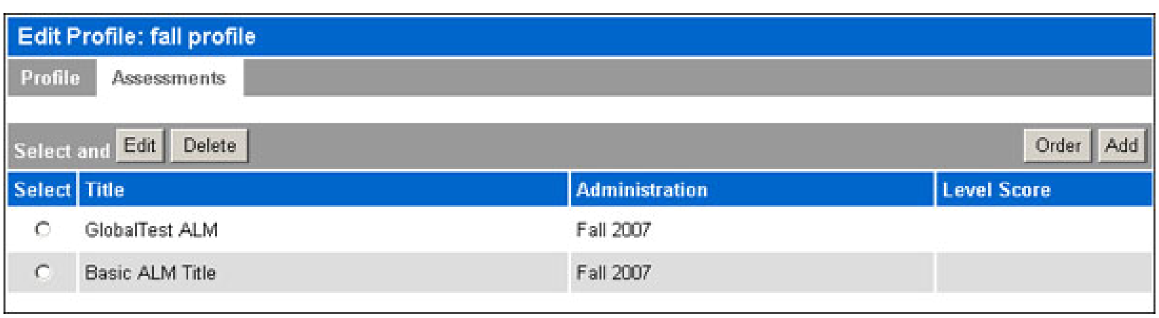
Profile tab



If you wish, you may edit the name or description fields. You must click **Submit** to save your changes.

Assessments tab

If assessments have already been linked to the profile, you will see them listed in the "Assessments" tab as shown below. If assessments have not been linked or you wish to include additional assessments, you may add them at this time by clicking the **Add** button on the far right.

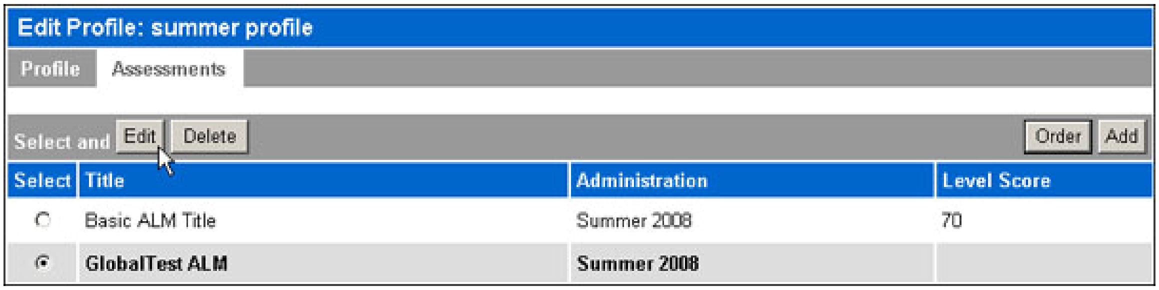


- For detailed information about how to add assessments to a profile, please refer to the "Assessment tab" section in the topic *Create a New Profile*.

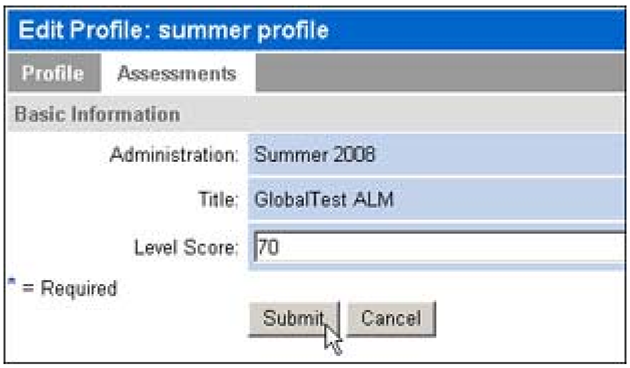
Once a profile has been added, the data can be customized based on the needs of the site.

EDIT ASSESSMENT SCORING DATA

From the assessments tab, if you wish to add a score requirement or "level score" to the assessment, select the radio button next to the assessment you wish to modify. Click the **Edit** button.



This will allow you to enter the score examinees are expected to achieve.



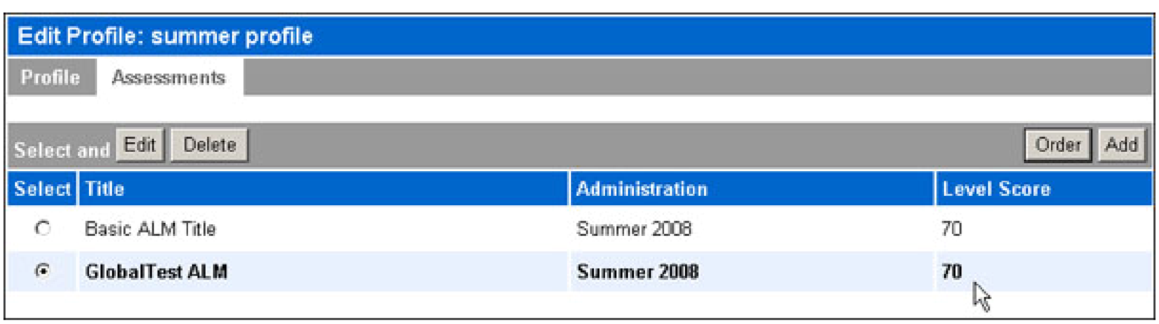
Level Score: Enter the score or skill level the examinee is expected to achieve. Typically, this would be a numerical value, but all alphanumeric characters are allowed for those with special needs.

Score Report (not applicable to all selected Titles): Select the report type from the drop-down box, or select "No Report" if you do not wish to generate a score report after the exam is complete.

Extended Time (not applicable to all selected Titles): If the field is available, select the hour value of extended time examinees are allowed to have to complete a test. Or, select "Standard time" if you do not wish to extend the time limit.

When you are finished entering data, click the **Submit** button to save your changes and return to the list of assessments.

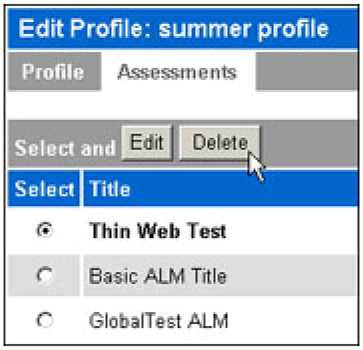
The updated level score will be displayed in the third column.



DELETE ASSESSMENTS

To delete an assessment from a profile, select the radio button next to the one you wish to delete.

Click the **Delete** button located above the list of assessments.



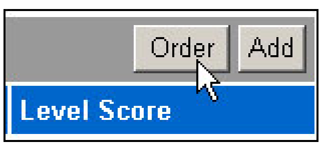
A pop-up box will display. Read the message carefully before confirming your choice.

Click OK to delete the selected assessment and return to the updated list, or click Cancel to return to the list without deleting.

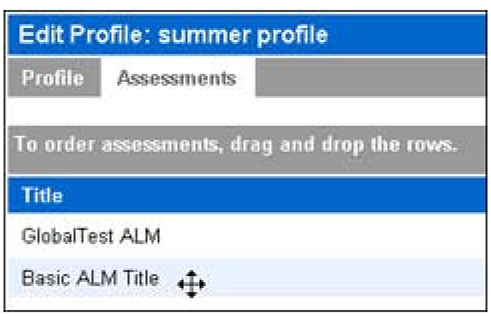
ORDER OF ASSESSMENTS

If more than one assessment has been selected, you can opt to present the assessments to the examinee in a specific order.

Click the **Order** button, located on the far right of the screen, to arrange the order assessments in the profile



Place your mouse over the Title you wish to move. Click and drag the assessment row to the new location and let go of the mouse.

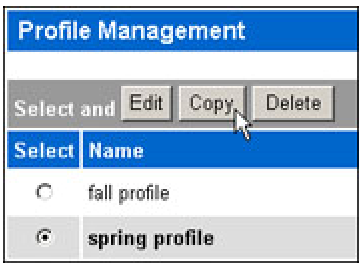


When you are finished arranging the assessments, click the **Submit** button to save the changes.

Copy a profile

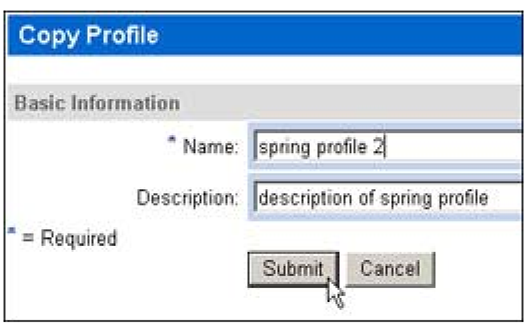
To copy an existing profile, select the radio button next to the profile you wish to copy.

Click the **Copy** button located above the list of profiles.



Enter a new name for your copied profile. You cannot create a profile with the same name.

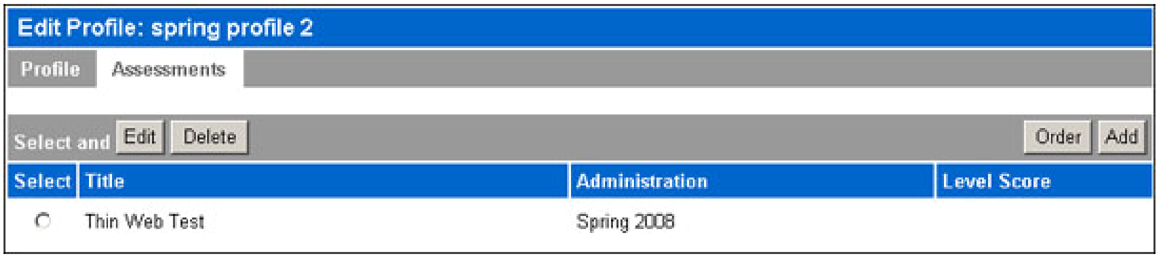
Change the description if you wish.



There are two tabs of information associated with each profile. They are labeled "Profile" and "Assessments."

Click **Submit** when you are ready to go on to the next tab and view the assessments associated with this profile.

The assessments and level scores that were in the original profile will be set up for you.

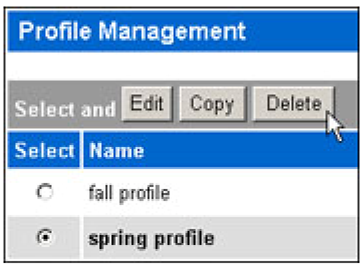


- If you wish to make changes to your profile, please refer to the section at the beginning of this topic on how to "Edit a profile."

Delete a profile

To delete an existing profile, select the radio button next to the one you wish to delete.

Click the **Delete** button located above the list of profiles.



A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected profile and return to the updated list, or click **Cancel** to return to the list without deleting.

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Create a New Profile

This section describes how to create a new profile and also describes in detail the fields and functionality of each tab.

- Create a profile
  - Profile tab
  - Assessments tab

See also: Edit a Profile

Create a profile

Click **Profile Management** from the main menu.

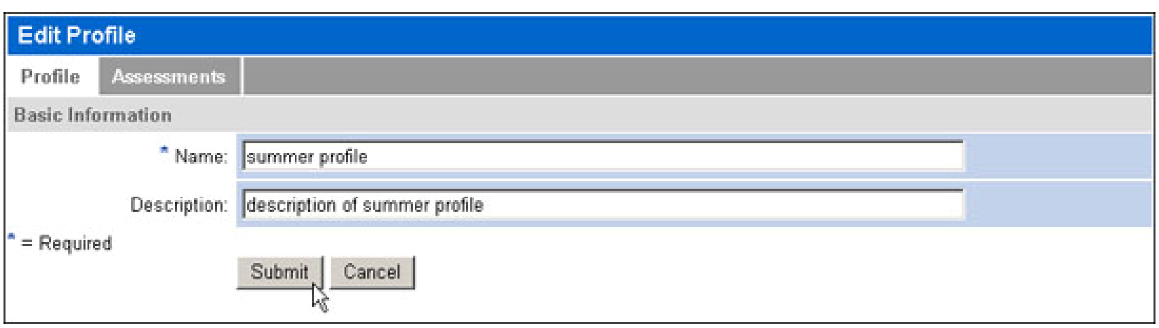
Click the **Create** button located on the far right of the main Profile Management page.

There are two tabs of information associated with each profile. They are labeled "Profile" and "Assessments." You must first enter the required, basic information in the first tab before advancing to the next tab.

Required fields are marked with an asterisk.

Profile tab

**Indicates a required field.*



***Name**: Enter the name of your profile.

Description: Enter a brief description of the profile or purpose of the profile or required assessments.

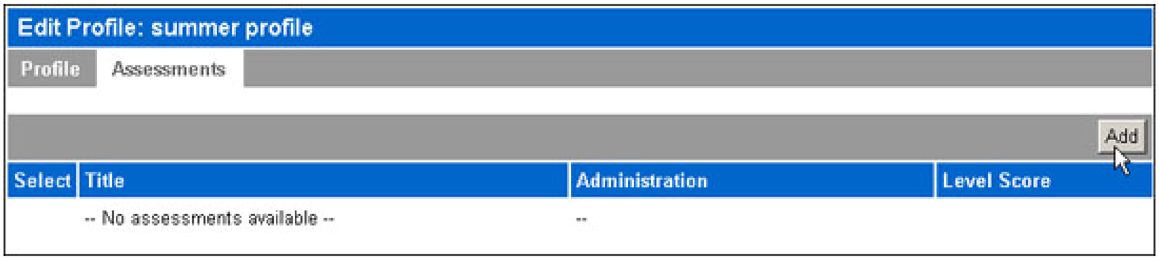
Click **Submit** when you are ready to go on to the next tab.

Assessments tab

In a new profile, assessments have not yet been linked to the profile and so none will be listed.

ADD ASSESSMENTS

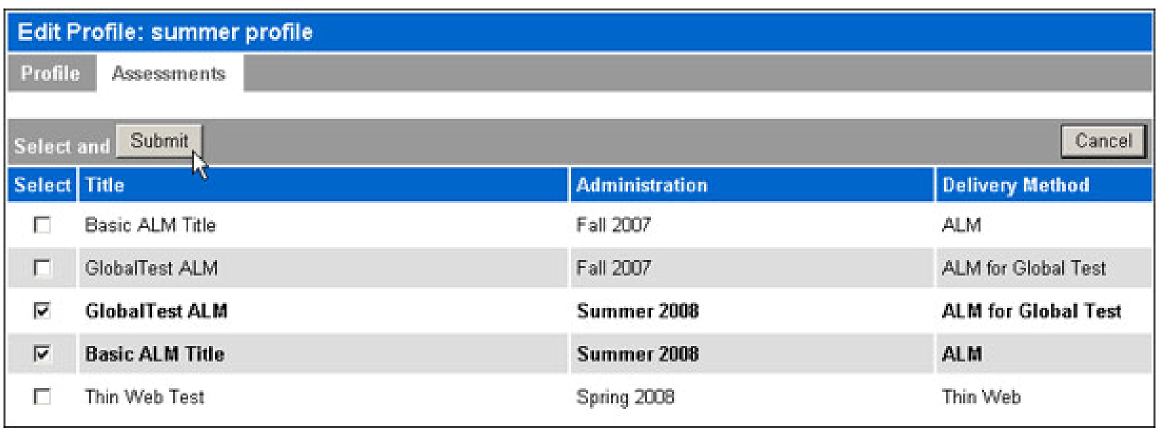
Click the **Add** button, located on the far right of the screen, to add assessments to the profile.



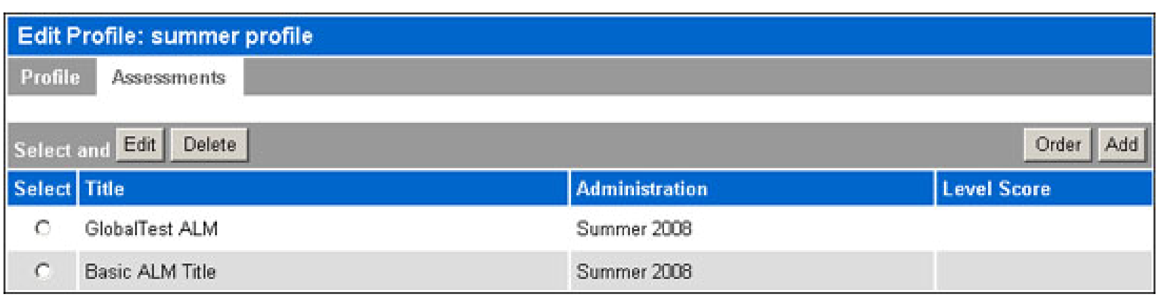
If assessments have been created, they will be listed for you.

- **NOTE**: You cannot create profiles if there are no assessments to add. If you do not have access to the main menu item "Assessment Management," inform your realm manager that assessments must be created before you can set up profiles.

Mark the checkbox next to the test Title(s) you wish to add to your profile and click **Submit**.



This will return you to the assessment list where your selected Titles have been added to your profile.



Now that your profile has been created, you can fine-tune the profile you have added. These customizations include adding additional assessments, editing assessment scoring data, and selecting the order of assessment delivery.

- For more details, please refer to the section on "Edit a profile" at the beginning of the topic on *Profile Management*.

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Barcode Management

User Role Access: Ultra User, Barcode Manager

The **Barcode Management** page will help you define the barcodes you have generated, linking them to the assessments and registration attributes you have created. Barcodes are used to track paper and pencil-delivered tests and other assessments as defined.

There are three steps that must take place before you will be able to use Barcode Management:

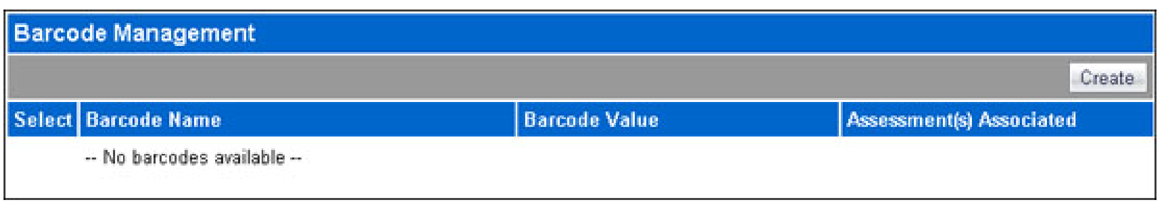
- First, barcodes are generated using the *Barcode Generate* utility and distributed for use.
- Second, registration attributes must be defined using the *Attribute Management* portion of the VTC Admin Console if you want to link assessments.
- Third, registration attributes must be linked to the assessments using *Assessment Management*.

Once these steps are completed, you may then begin assigning generated barcodes to your realm using the Barcode Management menu option. You may also link them to assessments. This will automatically link the registration attributes to your assessments based on the assigned barcode.

In this way, when you deliver an assessment via paper and pencil, you can require the same registration attribute standards for each examinee as if they had taken an online-delivered version of the exam. Once the paper and pencil tests are collected, the data is transferred to a data warehouse based on the barcode, and the tests will have values stored in the database for the registration attributes.

Click **Barcode Management** from the main menu to define generated barcodes.

If you need assistance obtaining barcodes, talk to the person responsible for obtaining barcodes for your realm.

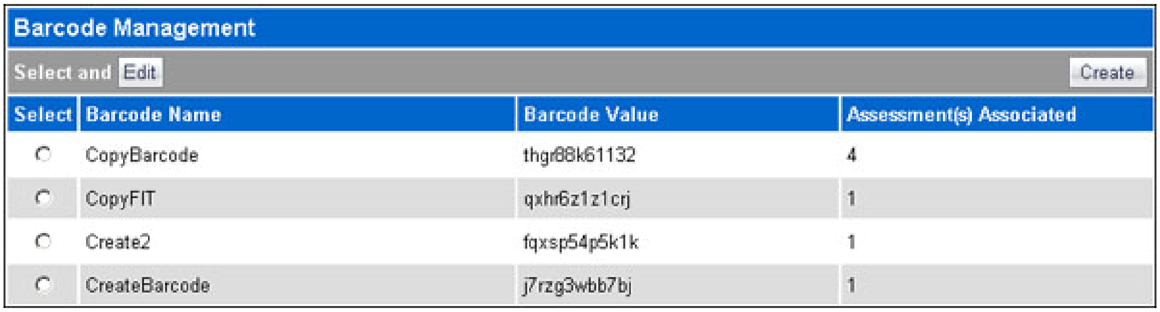


- View/Edit barcode
- Create (define) barcode

See also: *Barcode Generate*

View/Edit barcode

If barcodes have already been associated and defined, click **Barcode Management** to view the list of Barcodes that have been associated with your realm.

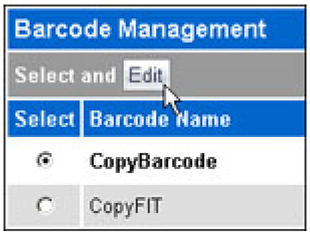


Barcode Management

Select and Edit | Create

Select	Barcode Name	Barcode Value	Assessment(s) Associated
○	CopyBarcode	thgr88k61132	4
○	CopyFIT	qxhr6z1z1crj	1
○	Create2	fqxsp54p5k1k	1
○	CreateBarcode	j7rzg3wbb7bj	1

To view the details of an individual barcode, click the radio button next to the barcode you wish to view. Click the **Edit** button located above the list of barcodes.

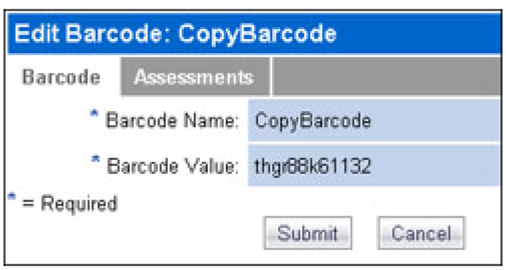


Barcode Management

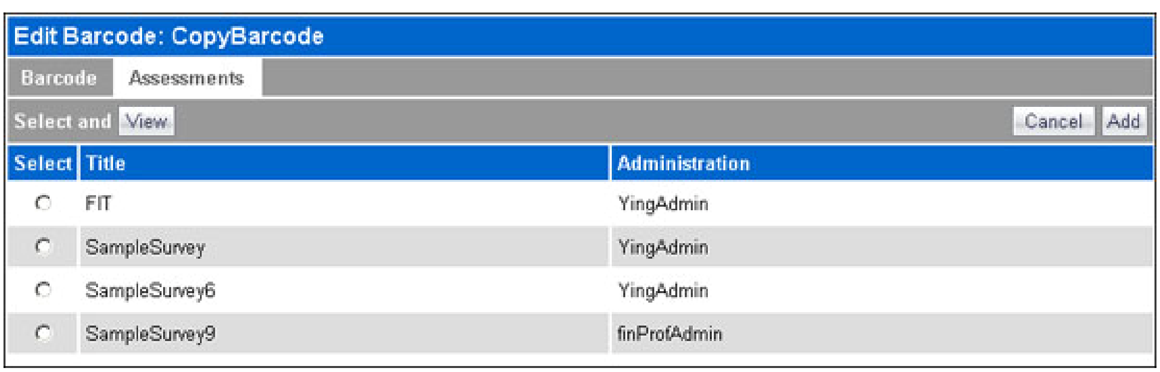
Select and Edit

Select	Barcode Name
◉	**CopyBarcode**
○	CopyFIT

There are two tabs of information associated with each Barcode. They are labeled "Barcode," and "Assessments." Click the tab titles to view the stored data. The Barcode tab is shown below.



Click the **Assessments** tab or the **Submit** button to view any assessments that are linked to the barcode.



Edit Barcode: CopyBarcode

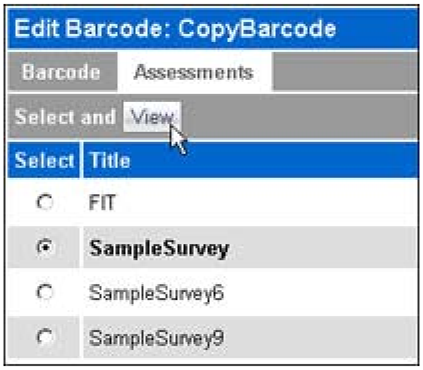
Barcode | Assessments

Select and View | Cancel | Add

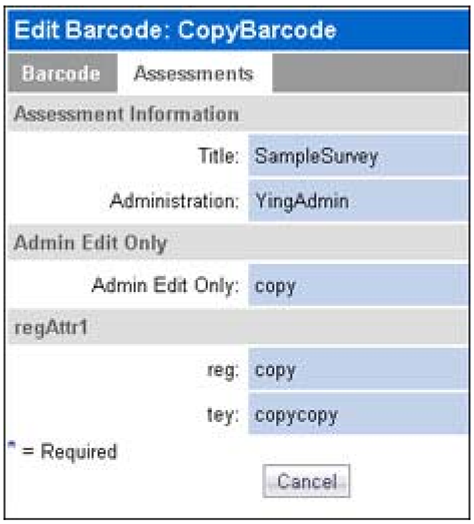
Select	Title	Administration
○	FIT	YingAdmin
○	SampleSurvey	YingAdmin
○	SampleSurvey6	YingAdmin
○	SampleSurvey9	finProfAdmin

- If you wish to add assessments to the barcode, click the **Add** button located to the far right of the screen. Follow the steps below in the section "Create (define) barcode."

To view specific details about an assessment, click the radio button next to the assessment title and click **View**.



The assessment's details and registration attributes will be displayed.



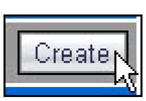
To return to the list of assessments, click the **Cancel** button.

When you are finished, click the **Barcode Management** menu option, or continue to press **Cancel** to return to the Barcode Management page.

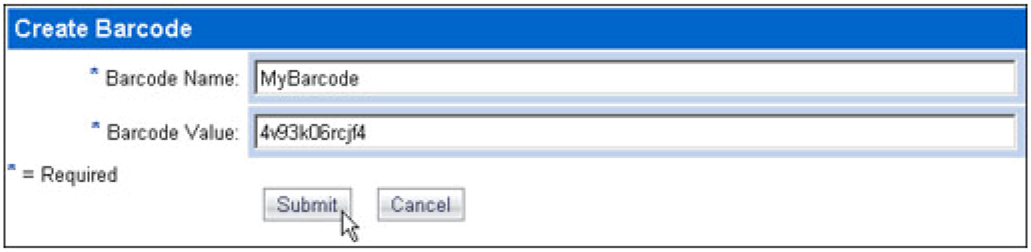
Create (define) barcode

Once you have been provided barcodes, you are ready to associate them with your realm and link any assessments that you wish.

To begin, click the **Create** button located on the far right of the Barcode Management page.



This will display the Create Barcode screen.



Barcode Name: Enter a unique name to identify your barcode.

Barcode: Enter one of the provided barcodes.

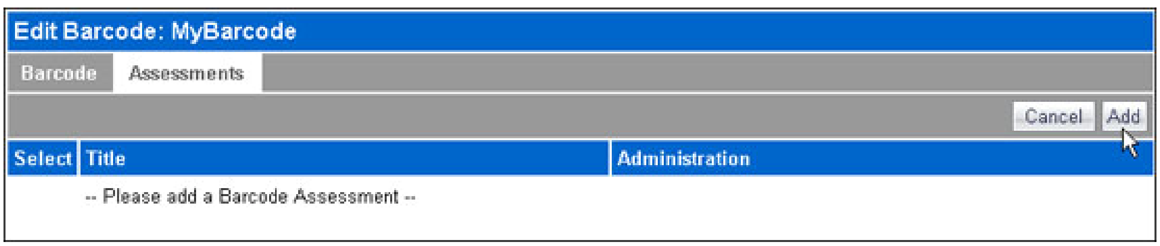
- **NOTE**: The barcode should be included in the header at the top of the test form.

Click the **Submit** button when you are ready to go on.

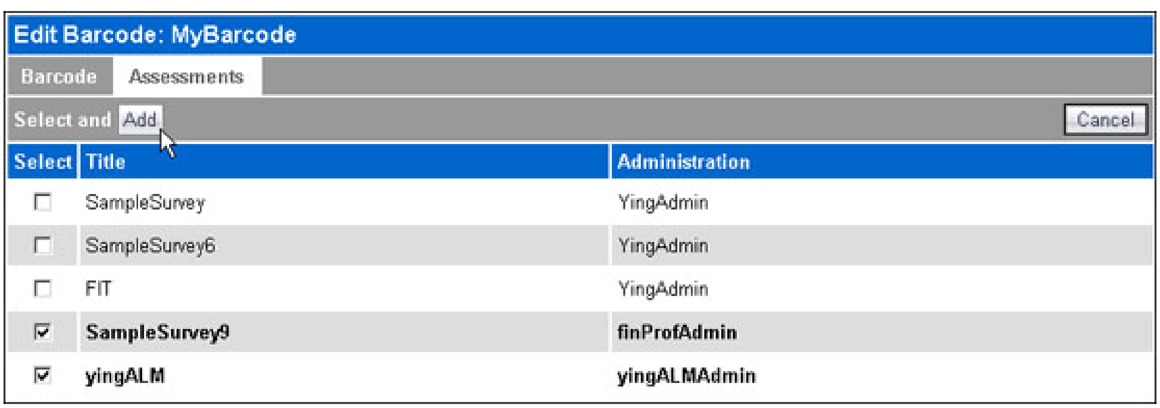
This will display the tabs for the barcode you are defining. The Barcode tab, you have just set up. Now you will define the assessments that will be linked to the barcode.

If you wish to link assessments at this time, click the **Add** button located to the far right of the screen.

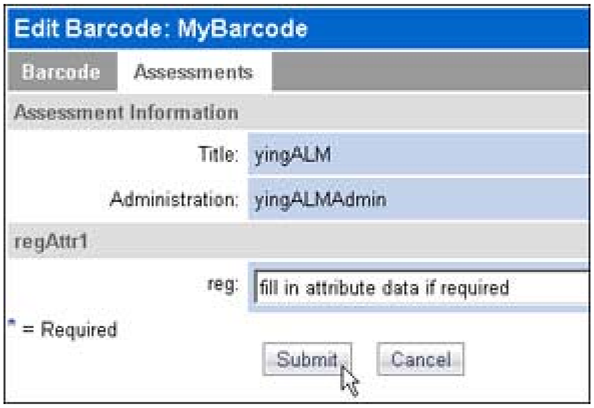
- **NOTE**: You do not need to link assessments to your barcode. You may continue to set up barcodes and return at a later time to link the assessments if needed.



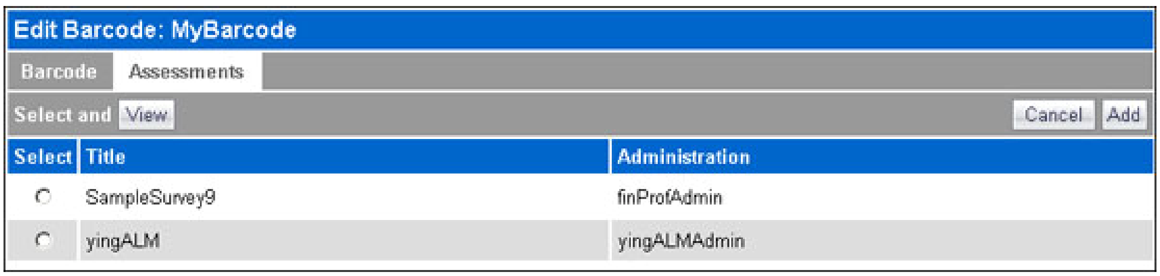
Mark the checkbox next to the available titles to indicate one or more of the assessments that you want to link to your barcode. When you are finished making selections, click the **Add** button.



Because you have defined registration attributes for the assessment you selected (as shown in the example below), you will be asked to fill those in at this time. Click the **Submit** button after each assessment if you selected more than one.



After you reach the last assessment, you will return to the barcode list where your assessment or assessments will be displayed.



If you are finished adding assessments, click the **Barcode Management** menu option, or continue to press **Cancel** to return to the Barcode Management page.

Your new barcode will be displayed on the Barcode Management page.

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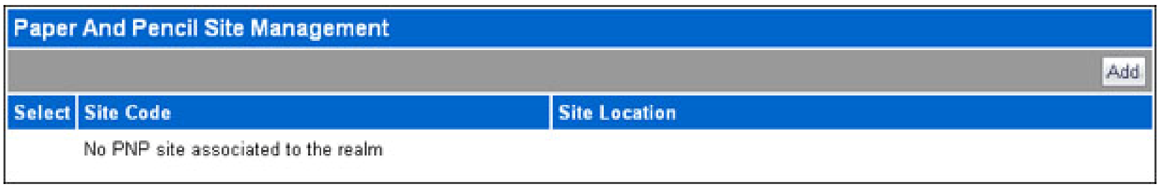
Paper and Pencil (PNP) Site Management

User Role Access: Ultra User, PnP Manager

Sites that administer paper and pencil tests have been issued a PNP Code. The **PNP Site Management** will help you associate paper and pencil (PNP) site codes with a realm.

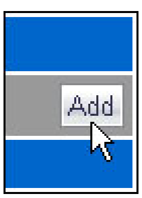
Click **PNP Site Management** from the main menu to display a list of linked paper and pencil sites. From this page you may add or remove a PNP site link from your realm.



- Add a PNP site
- Edit a PNP site
    - Manage Administrators
    - Remove PNP administrator
    - Refresh PNP site
- Remove a PNP site

Add a PNP site

To add a PNP site, click the Add button located on the far right side of the screen.

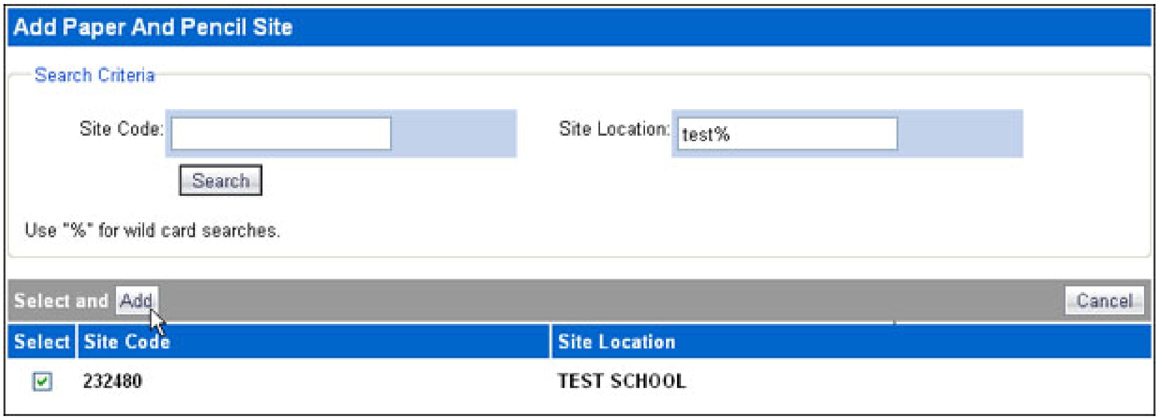


If you do not know the exact site code or location you are looking for, use the % sign as a wild card character to enter any part of the data in the search criteria fields. (Or, you may leave the fields blank to display all available sites.)

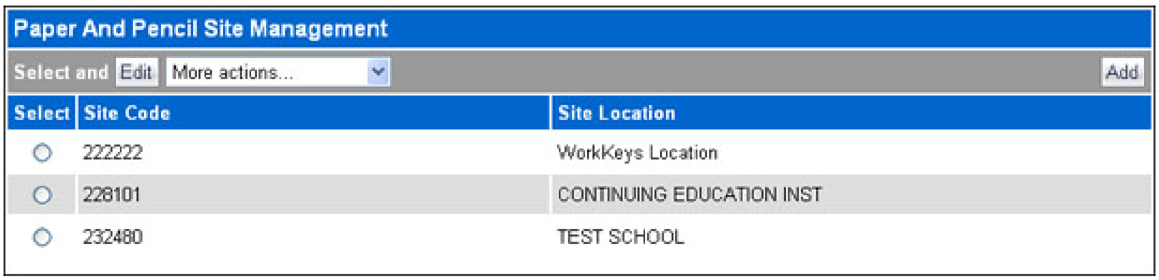
Make your criteria selections and click the **Search** button.

The list of sites matching your criteria will be displayed below.

Next, mark the checkbox to indicate the sites you wish to link to your realm. Click the **Add** button located above the list.



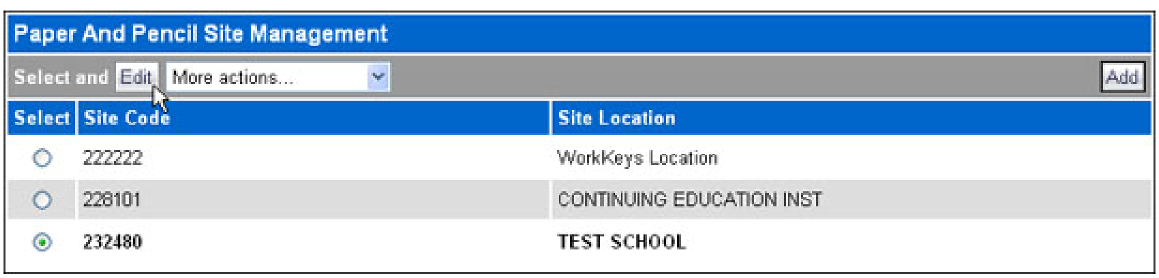
Your linked site will be shown on the updated Paper and Pencil Site list.



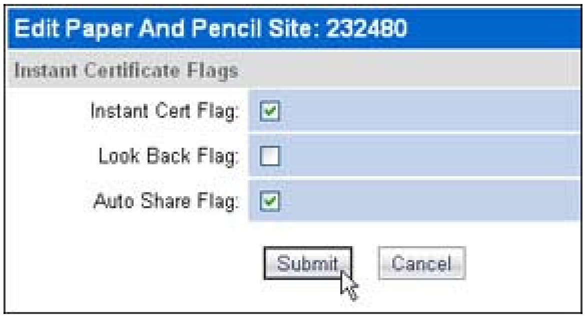
Edit a PNP site

To edit the PNP site options for a given site on your list, select the radio button next to the site you wish to edit.

Click the **Edit** button located above the list of Paper and Pencil Sites.



From this screen you can modify the Instant Certificate Flags attached to this PNP site. Check the box to indicate which flags you want set.



Instant Cert Flag: Mark the **Instant Cert Flag** to turn instant certificate processing on when test results are received from that particular testing site. (Instant certificates will be generated to show test scores and other pre-defined user data fields.)

Look Back Flag: If the instant certificate processing flag is on, mark the **Look Back Flag** to notify the system to include all of an individual's assessments, both current and past, when making the determination if a certificate should be created for the individual.

If the flag is not set, only the current tests from the processing bundle will be used to generate instant certificates.

Auto Share Flag: Mark the **Auto Share Flag** if you want Instant Certificates to be shared with the public. This allows employers or other authorized users to log in and verify results.

Click **Submit** to save your settings and return to the PNP site list.

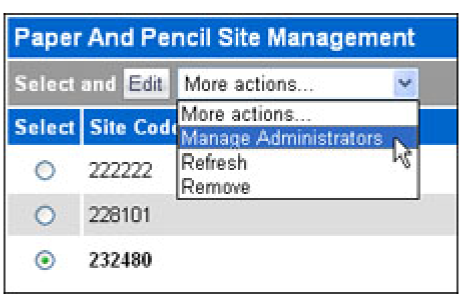
More Actions... (drop-down box)

- Manage Administrators
- Remove PNP administrator
- Refresh PNP site

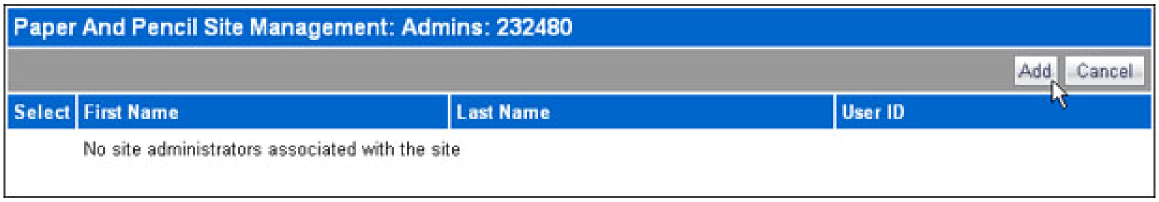
Manage administrators

ADD PNP ADMINISTRATOR

To link an administrator account to your PNP site, first select the radio button next to the PNP Site Code. Next, select **Manage Administrators** from the drop-down box.



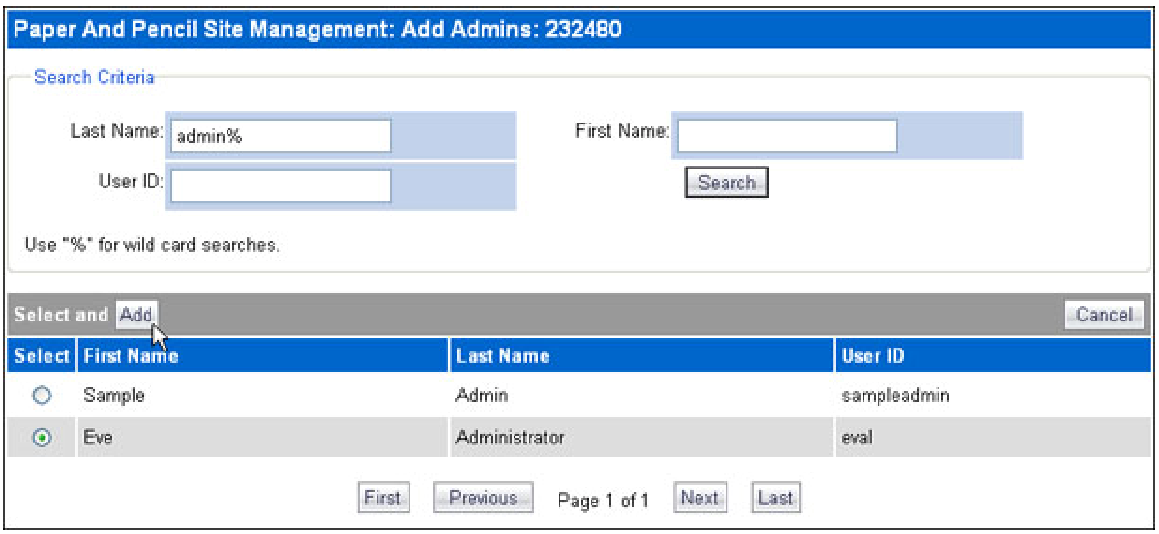
Any existing administrators will be displayed. To add to or begin your list, click the **Add** button.



If you do not know the exact name of the user you are looking for, use the % sign as a wild card character to enter any part of the name the search criteria fields. (Or, you may leave the search fields blank to display all available user names.)

Make your criteria selections and click the **Search** button. The search results will be displayed below the criteria list.

Select the radio button next to the name of the account you wish to add as a PNP administrator. Click **Add**.

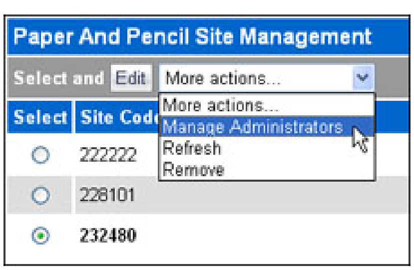


The name will be displayed on your list of administrators.

- **NOTE**: By default, administrator accounts are automatically set up to receive summary emails regarding the Instant Certificate process. If you do not wish to send these email notifications, you must **Edit** the administrator data as described below.

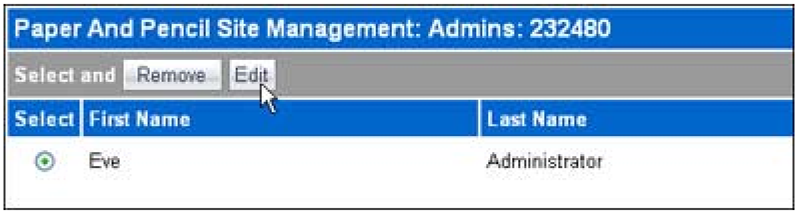
EDIT PNP ADMINISTRATOR EMAIL SUMMARY (ON/OFF)

If you are not already on the PNP administrator page, first select the radio button next to the PNP Site Code. Next, select **Manage Administrators** from the drop-down box.

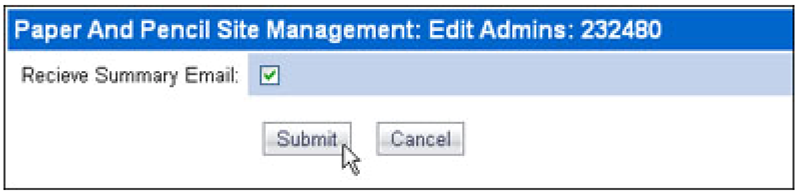


To edit the administrator's summary email preferences, select the radio button next to the administrator name you wish to edit.

Click the **Edit** button located above the list of names.



Click the checkbox to indicate whether the administrator will receive the Instant Certificate summary emails. Click **Submit**.



This will return you to the list of administrators.

REMOVE PNP ADMINISTRATOR

As with Edit PNP Sites, you must be on the PNP administrator page.

From the list of PNP Sites, select the radio button next to the PNP Site Code. Next, select **Manage Administrators** from the drop-down box.

To remove the administrator's association to your PNP Site, select the radio button next to the administrator's name you wish to remove.

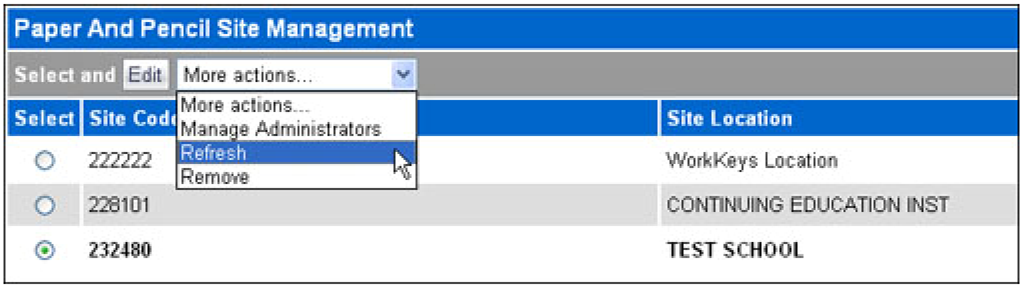
Click the **Remove** button located above the list of names.

The site administrator will be removed from the list.

Refresh PNP site

If the name of the PNP site has changed in the database, but is not reflected in the table on the Site Management page, you have the opportunity to "Refresh" it and force the name change.

To refresh a site name, first select the radio button next to the PNP Site Code. Next, select **Refresh** from the drop-down box.

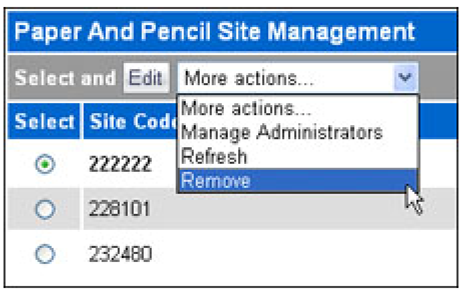


If the site name has been altered, the new name will be changed in the Site Location column.

Remove a PNP site

To remove a PNP site, select the radio button next to the site's name.

Next, select **Remove** from the drop-down box.



The PNP site will be removed from the list.

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Order Management

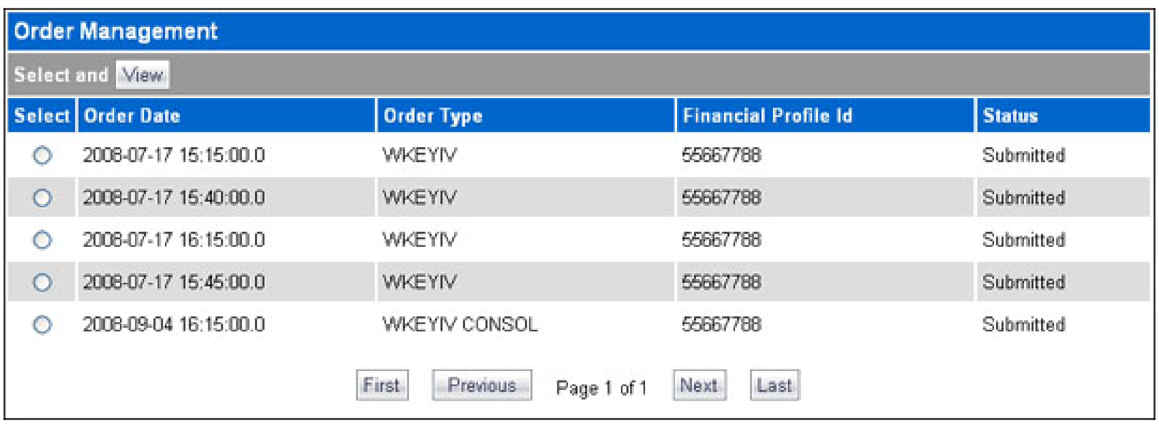
User Role Access: Ultra User, Order Manager

Users with the Order Manager role can view the status and details of billing orders associated with the realm. If your realm has an eBusiness account and you have Assessments set up to bill to your site upon launch, an order will be generated upon launch. There may be other billing order entries tracked through Order Management that would also appear on this list.

- View order list
- View order details
    - Order Header tab
    - Order Line tab

View order list

Click **Order Management** from the main menu to view the status and order details of the active orders associated with your Realm.



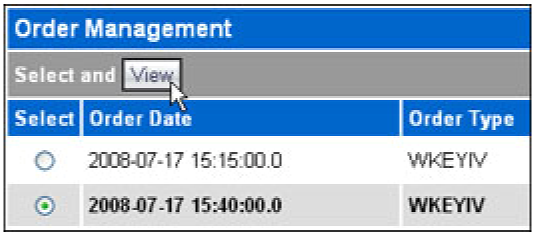
Select	Order Date	Order Type	Financial Profile Id	Status
○	2008-07-17 15:15:00.0	WKEYIV	55667788	Submitted
○	2008-07-17 15:40:00.0	WKEYIV	55667788	Submitted
○	2008-07-17 16:15:00.0	WKEYIV	55667788	Submitted
○	2008-07-17 15:45:00.0	WKEYIV	55667788	Submitted
○	2008-09-04 16:15:00.0	WKEYIV CONSOL	55667788	Submitted

- If the list is more than one page, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you find the order you want.

View order details

To view a specific order, select the radio button next to the order.

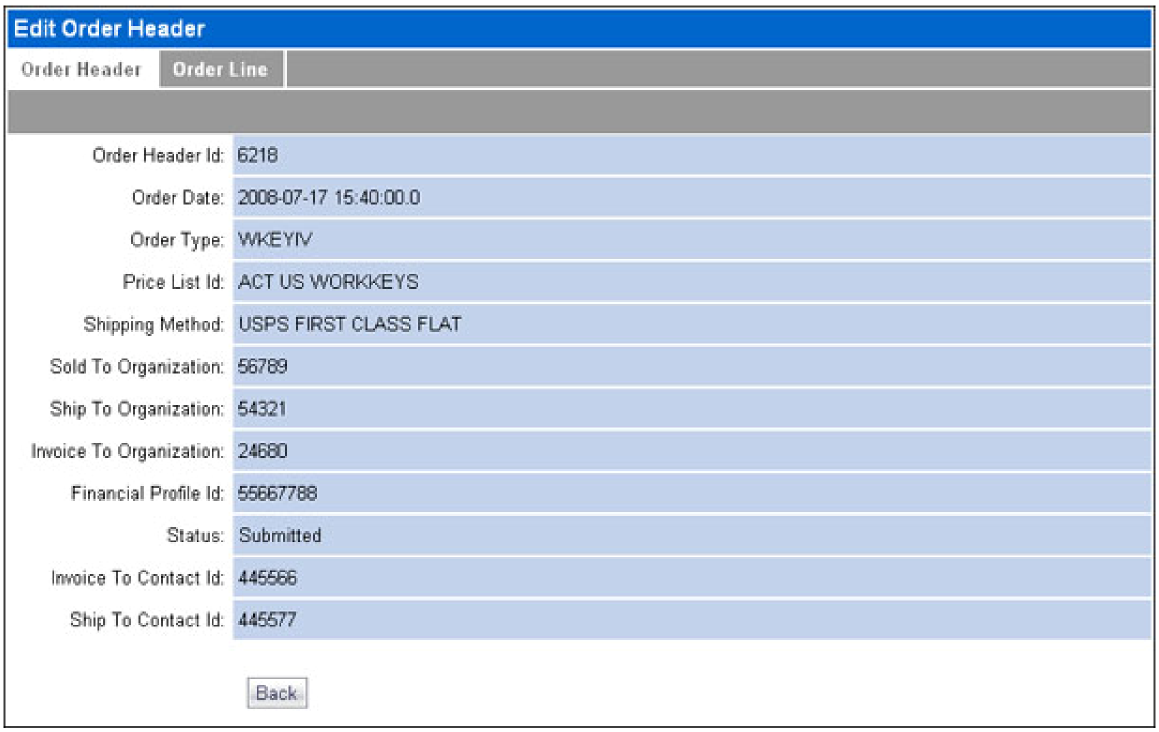
Click the **View** button, located above the order list.



There are two tabs of information associated with each order. They are labeled "Order Header," and "Order Line." Click the tab titles to view the stored data.

Order Header tab

This will display the Order Header data.



Click **Back** if you are finished and want to return to the list of orders.

Or, click the **Order Line** tab.

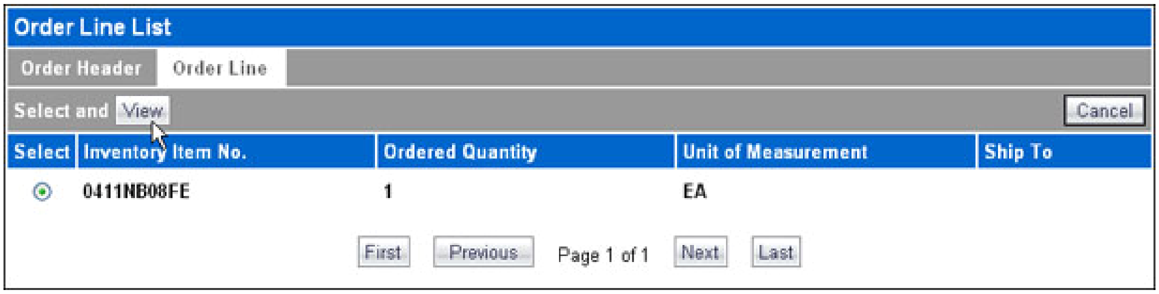
Order Line tab

This will display the Order Line item list.

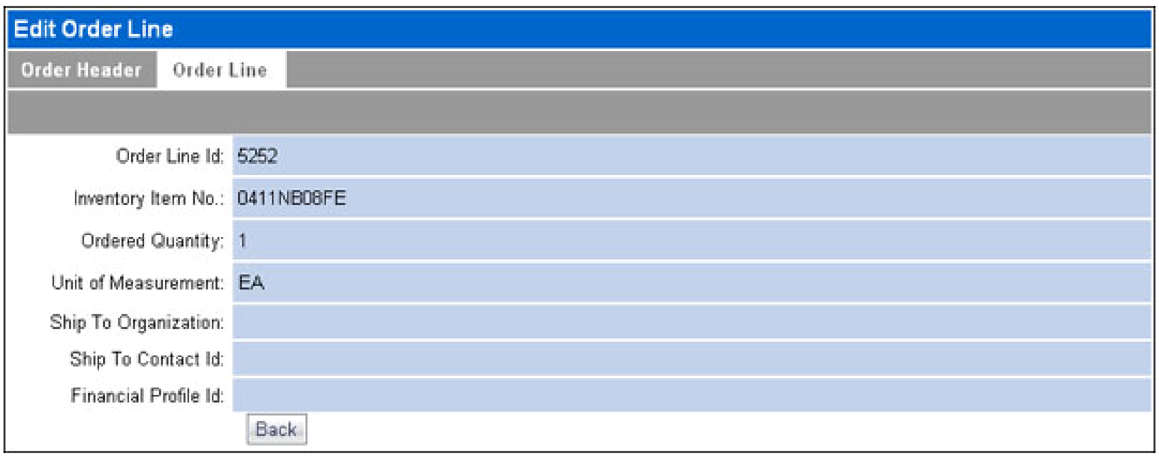
- If the list is more than one page, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you find the item you want.

To view a specific order line, select the radio button next to the Inventory Item Number.

Click the **View** button, located above the list.



This will display the Order Line data.



Click **Back** if you are finished and want to return to the order line list.

Then, click **Cancel** if you are finished and want to return to the list of orders.

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Financial Profiles

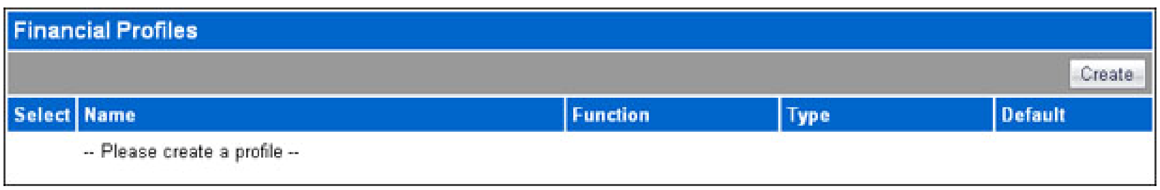
User Role Access: Ultra User, Financial Profile Manager

Financial Profiles will help you define billing profiles that link the launching of VTC tests requiring payment and the finance system. It defines in advance who will be billed for those tests. You may change the default profile if the realm is set up with more than one profile. If examinees registers themselves for a test that does not require them to select a financial profile as part of the registration attributes, that exam will automatically be billed to the default profile.

To enable use of the Financial Profiles options, you must first set up a standard registration attribute named finProf.

- That process is described in the *Create Attributes* topic in the section "Add attributes to a category" under "Standard Registration Attributes."

Click **Financial Profiles** to create and edit financial profiles, and change the profile default.

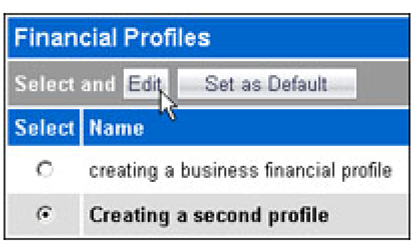


- Edit financial profile
- Set profile default

See also: Create a Financial Profile

Edit financial profile

To edit or view an existing profile, select the radio button next to the profile you wish to modify. Click the **Edit** button located above the list of profiles.



There are several tabs of information associated with each profile. They are labeled "Numbers," "Addresses," and "Contacts."

Click the tab title to view or edit the stored data for your realm. Required fields will be marked with an asterisk.

- For detailed information about the data fields in each tab, please refer to the topic *Create a Financial Profile*.

Numbers tab

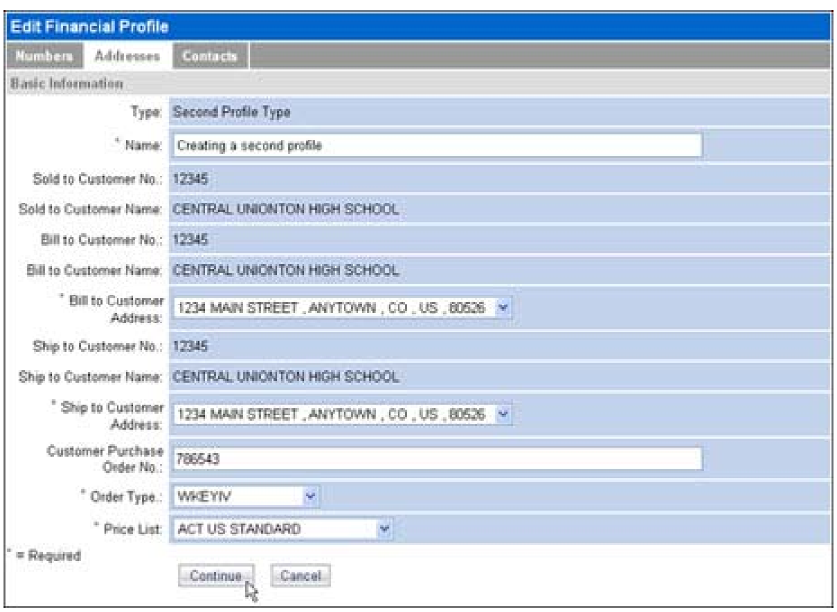
The **Numbers** tab is the first tab shown by default.

From here, you may modify the Sold to, Bill to, or Ship to Customer number fields. Click the **Continue** button to save any data changes.

If you do not wish to make changes, click the **Addresses** tab when you are ready to go on.

Addresses tab

This will open the Addresses tab where you can modify or view stored address information.



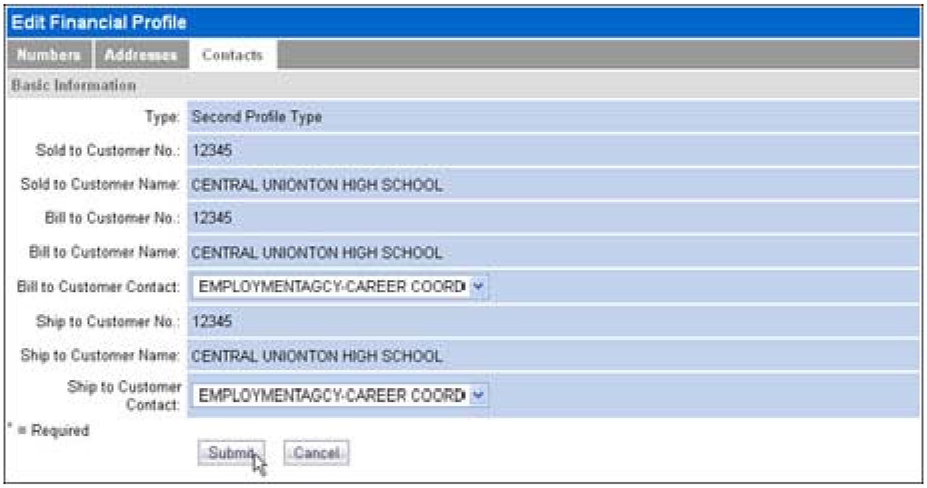
(If you have changed the customer numbers on the Numbers tab, you may need to select a new address from the drop-down list.)

Click the **Continue** button to save any data changes.

If you do not wish to make changes, click the **Contacts** tab when you are ready to go on.

Contacts tab

This will open the Contacts tab where you can modify or view stored contact information.



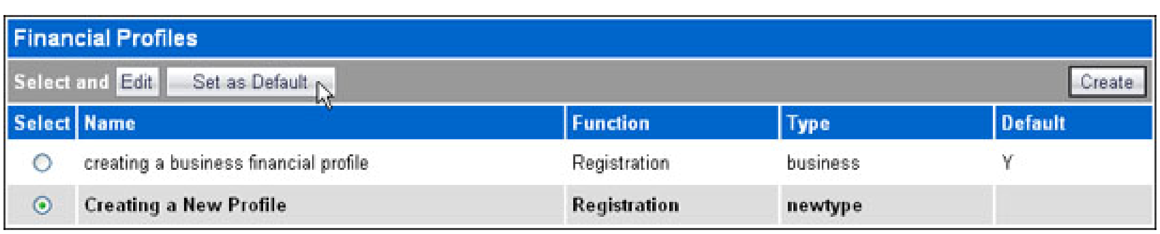
(If you have changed the customer numbers in the previous screens, you may need to select a new address from the drop-down list.)

Click **Submit** when you are finished or on **Cancel** if you do not wish to save your changes.

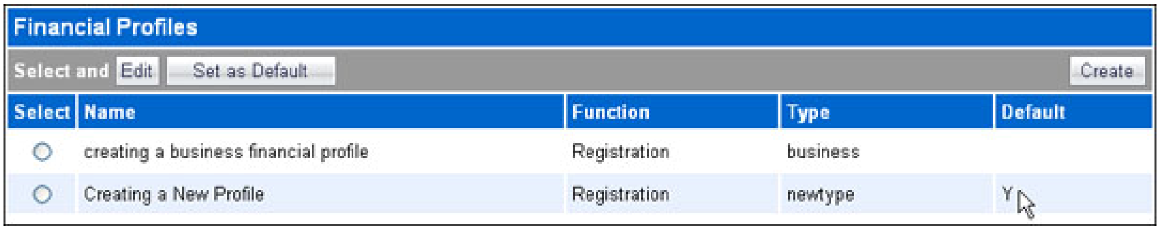
Set profile default

For realms with one profile, the single profile is automatically set as default. For realms with more than one profile, the first profile created is automatically set as default. The default profile is marked with a **Y** in the Default column.

To change the default setting, select the radio button next to the profile you wish to set as default. Click the **Set as Default** button located above the list of profiles.



This will update your list indicator in the Default column.



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Create a Financial Profile

This section describes how to create a new financial profile and also describes in detail the fields and functionality of each tab.

- Create financial profile
    - Numbers tab
    - Addresses tab
    - Contacts tab

Create a financial profile

Click **Financial Profiles** from the main menu.

Click the **Create** button located above the list of profiles.

First, select the financial profile function from the drop-down box.

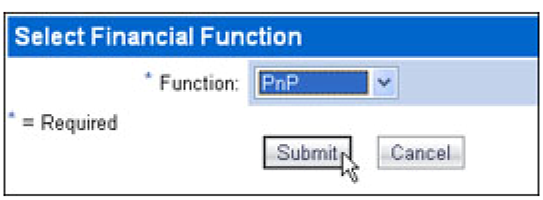
PnP: Set up billing for PNP sites associated with a realm.

Realm: Billing defined at the realm level.

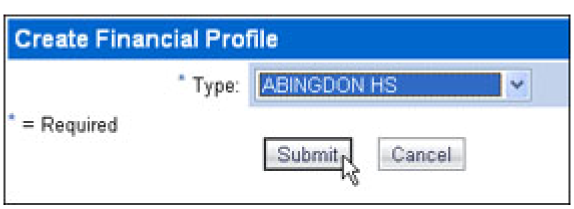
Registration: Billing for testing events.

NOTE: To create Registration Financial Profiles, first you must set up the standard registration attribute "finProf", and define the values list for your financial profile selection types. If these have not been set up, or are not enabled, an error message will prevent you from going on.

- Setting up the finProf registration attribute and values list is described in the *Create Attributes* topic in the section "Add attributes to a category" under "Standard Registration Attributes."



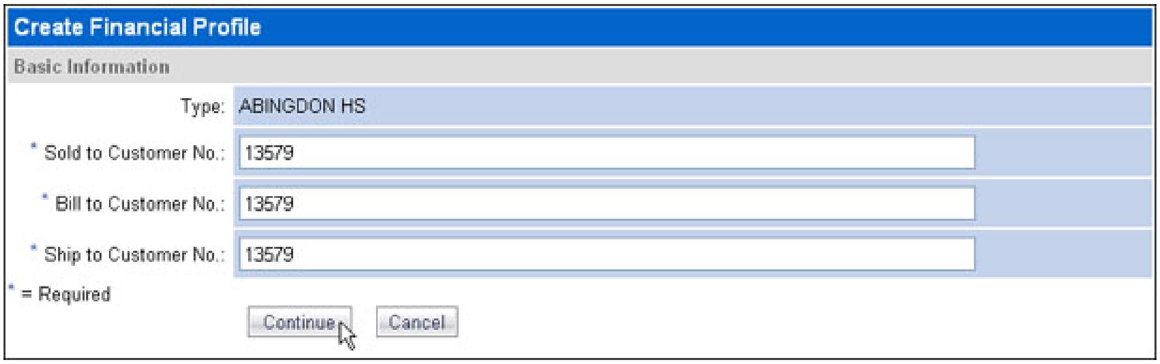
Click **Submit** when you are finished with your selection.



- **IMPORTANT TO NOTE**: Once you have created a financial profile of that type, you will be unable to use the same type to create another profile.

Numbers tab

The **Numbers** tab is the first tab shown by default.



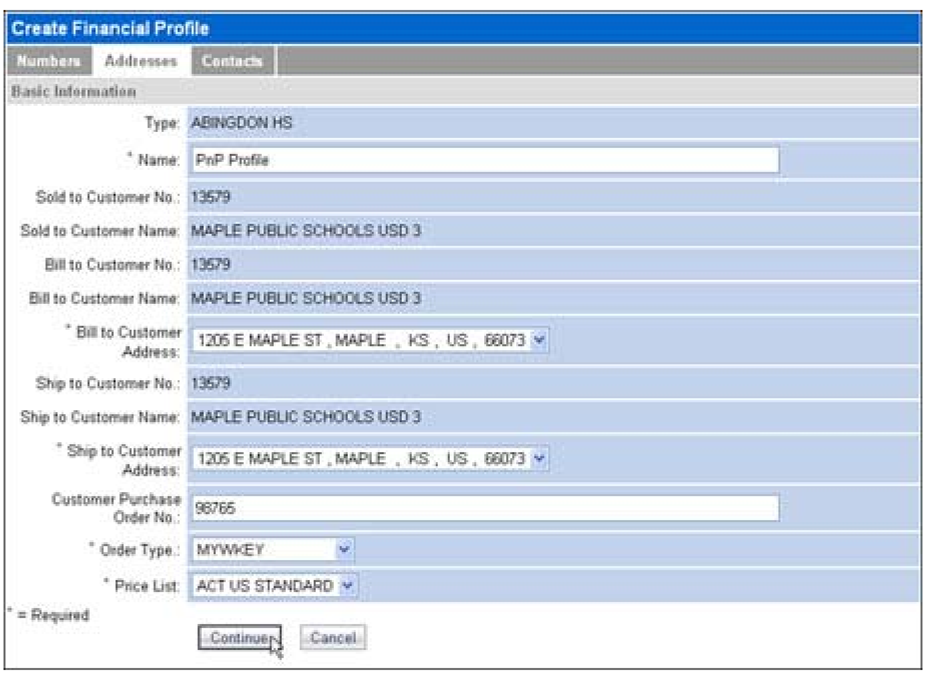
** Indicates a required field.*

Under Basic Information, enter the required Sold to, Bill to, Ship to customer numbers.

Click **Continue** to go on. (If you do not enter valid numbers for these fields, you will be unable to go on.)

Addresses tab

This will display the Addresses tab for the Financial Profile.



** Indicates a required field.*

Type: The type of profile that you selected. Once you have selected the type, this field is no longer editable.

* **Name**: Enter a name for your profile. This name will be displayed on the Financial Profiles page.

Sold To Customer No.: The buyer's customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Sold to field.

Sold To Customer Name: The name of the sold to customer is automatically populated based on the customer number you entered.

Bill to Customer No.: The billing customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Bill to field.

Bill to Customer Name: The name of the bill to customer is automatically populated based on the customer number you entered.

* **Bill to Customer Address**: Use the drop-down box to select the address associated with the customer number.

Ship to Customer No.: The shipping customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Ship to field.

Ship to Customer Name: The name of the ship to customer is automatically populated based on the customer number you entered.

* **Ship to Customer Address**: Use the drop-down box to select the address associated with the customer number.

Customer Purchase Order No.: Enter the purchase order number. This field is optional.

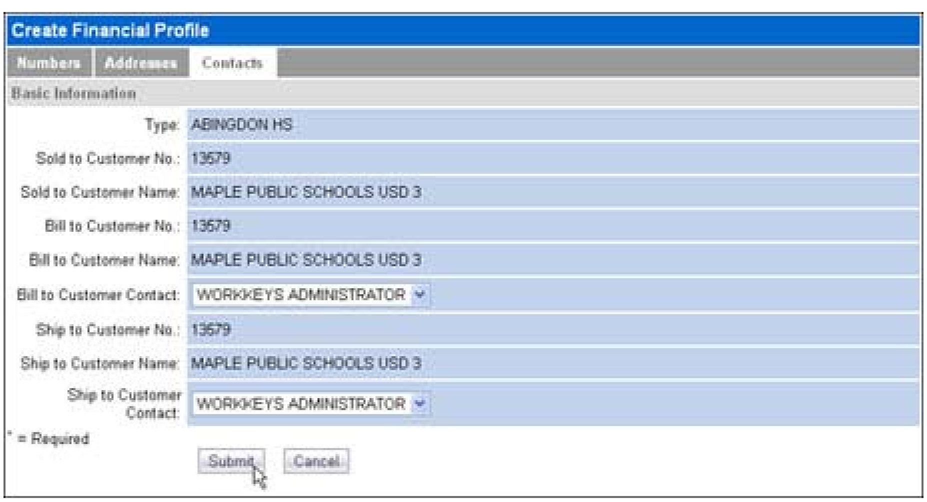
*** Order Type**: Use the drop-down box to select the order type.

* **Price List**: Select one of the eBusiness Price List options from the drop-down box.

When you have finished entering the required data, click the **Continue** button to go on.

Contacts tab

This will display the Contacts tab for the Financial Profile.



** Indicates a required field.*

Type: The type of profile that you selected. Once you have selected the type, this field is no longer editable.

Sold To Customer No.: The buyer's customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Sold to field.

Sold To Customer Name: The name of the sold to customer is automatically populated based on the customer number you entered.

Bill to Customer No.: The billing customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Bill to field.

Bill to Customer Name: The name of the bill to customer is automatically populated based on the customer number you entered.

Bill to Customer Contact: Use the drop-down box to select the contact name associated with the customer number.

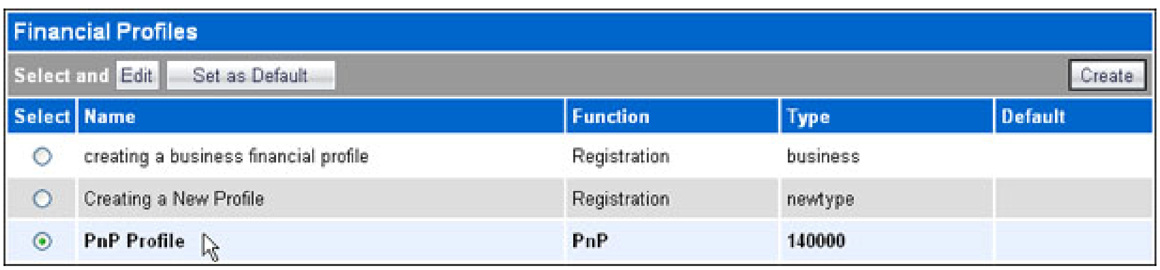
Ship to Customer No.: The shipping customer number you entered. Once you have selected it, this field is not editable on this page. Click the **Numbers** tab to edit the Ship to field.

Ship to Customer Name: The name of the ship to customer is automatically populated based on the customer number you entered.

Ship to Customer Contact: Use the drop-down box to select the contact name associated with the customer number.

When you are finished with your selections, click the **Submit** button to store your new profile.

This will return you to the Financial Profiles page where you will see your financial profile on the list.



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Attribute Management

User Role Access: Ultra User, Attribute Manager

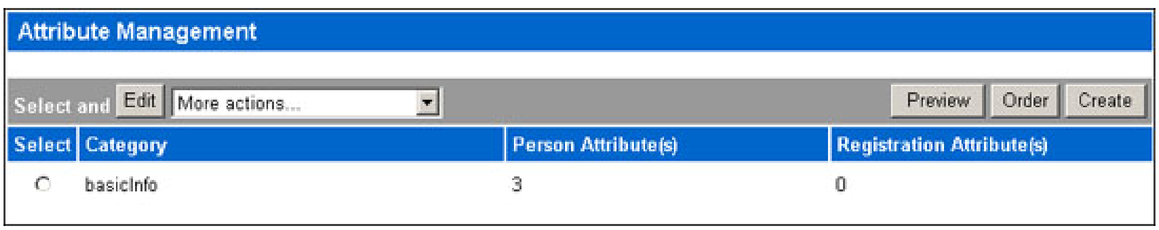
- *The Attribute Manager role can only access the **Assessment Management** menu to set up and edit the attributes associated with the assessments.*

Attribute management will help you define the demographic characteristics and registration requirements for your realm. You may edit, delete, or create attribute categories, create and/or assign the individual attributes in each category, and select the order you want the attribute categories and individual attributes to be presented.

The only attribute category that is standard for each realm is the "basicInfo" category. It contains the First Name, Last Name, and Email Address attributes. While it is possible to delete these attributes, it is not recommended.

Additional attributes are not required, but it is helpful if you wish to collect more information from your users, specify additional registration requirements, etc. Furthermore, to enable Registration Financial Profiles, you must set up and define a standard registration attribute named finProf. That process is described below.

Attribute Management is fully customizable. For a function (person or registration attribute), you may add up to 25 date attributes, 125 other attributes, and as many attribute categories as you need.



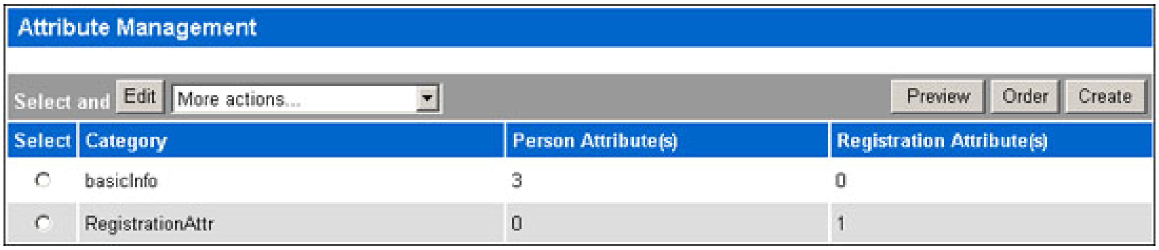
- Edit attribute category
- More actions... (drop-down box)
    - Edit Person or Registration Attribute(s)
        - Delete attributes from a category
        - Order of attributes within a category
    - Delete a category
- Preview attributes
- Order of categories

See also: Create Attributes (and attribute categories)

Edit attribute category

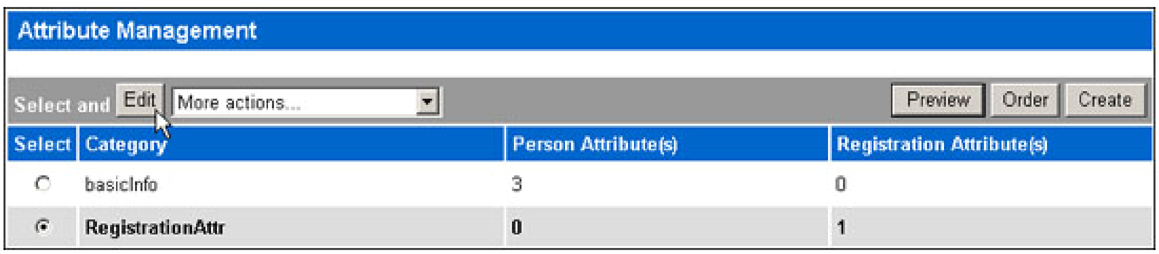
Click **Attribute Management** from the main menu. If attribute categories have been set up they will be displayed for you. If none have been created, skip to the section "Create attribute category" in the *Create Attributes* topic to begin.

Once an attribute category has been created, you cannot modify the name of the category that is stored in the database. But you can modify the label identifying the category to the end-user, or set up or modify the help text.



Click the radio button next to the category you wish to modify.

Click the **Edit** button located above the list of attribute categories.

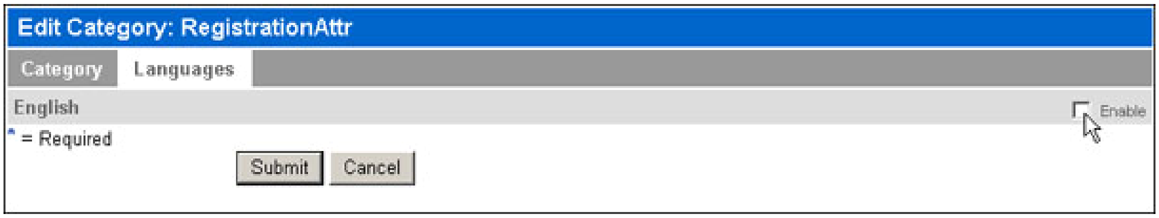


There are two tabs of information associated with each attribute category. The first tab, "Category", is display only and contains the name of the category. It cannot be modified after it has been created.

Click the **Languages** tab title to view the information stored in the "Languages" tab.

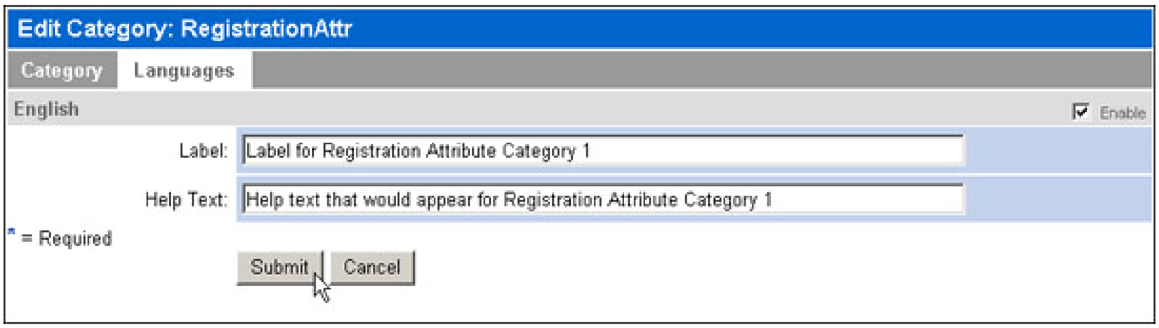
If the help text and category label has been set up for a language, that information will be displayed. You may modify the text if you wish.

If that text has NOT been set up for a language, click the **Enable** checkbox to the far right of that language.



- If your realm has been set up to accommodate multiple languages, additional rows of labels and help text will be available for each language. Each row can be enabled separately by clicking the **Enable** checkbox.

This will display the label and help text fields as shown below.



Label: In order for the category to be displayed for an end-user in that language, you must enter a label. When the attributes are displayed for an end user, the Label is what will be displayed to identify the attribute category. The Label may contain spaces. The category *name* which is stored in the database cannot contain spaces.

Help Text: In order to help users who need to fill in the attribute data, help text can be provided. When the Help Text field is filled in, a **(?)** will appear next to the label when the attribute is shown to the user allowing the user to access the help text. To remove the help text at a later date, delete the text in the field.

- **NOTE**: If at any time you decide you do NOT wish to display the category to the end-user, disable the **Enable** checkbox for the selected language.

Click **Submit** when you are finished entering data.

This will return you to the Attribute Management page.

More actions... (drop-down box)

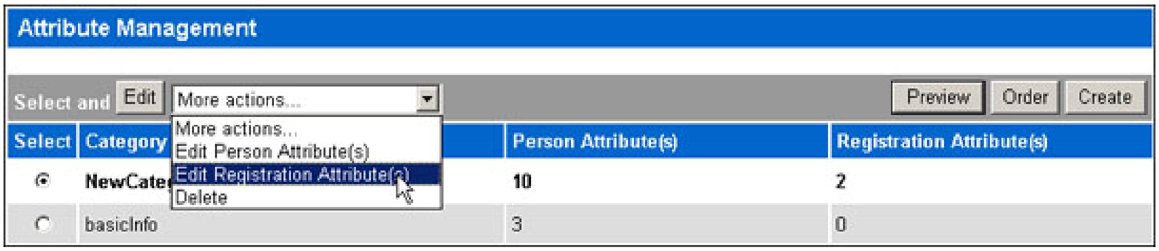
- Edit Person or Registration Attribute(s)
  - Delete attributes from a category
  - Order of attributes within a category
- Delete a category

Edit Person or Registration Attribute(s)

Once your categories and list of attributes have been created, you may need to edit or view certain characteristics within your categories.

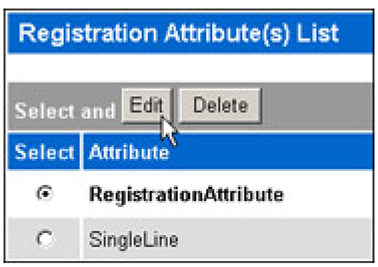
From the Attribute Management page, select the radio button next to the category containing the attribute you wish to modify.

Select the corresponding **Edit Attribute(s)** function from the **More actions...** drop-down box.



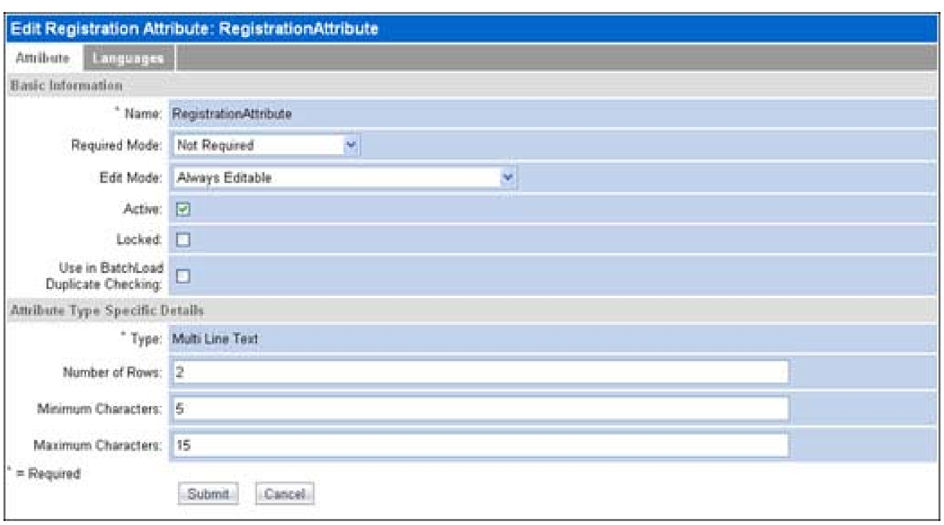
From the Attribute list, select the radio button next to the attribute you wish to modify.

Click the **Edit** button above the list of attributes.



With the exception of the attribute name, function, and value name (for predefined and multi response lists), most attribute characteristics in the Attributes and Languages tabs can be modified.

Click **Submit** to advance to the Languages tab or click the tab titles to toggle between the tabs of information.



From the Languages tab, clicking **Submit** will return you to the list of attributes.

- **NOTE**: If you have selected the Predefined or Multi Response List attribute type, you will have an additional tab of data called "Values." Please review the "Values tab" section in the *Create Attributes* topic if you have selected one of those attribute types.
- For a detailed description of the attribute types, fields, and options, please refer to the section on how to "Add attributes to a category" in the Create Attributes topic.

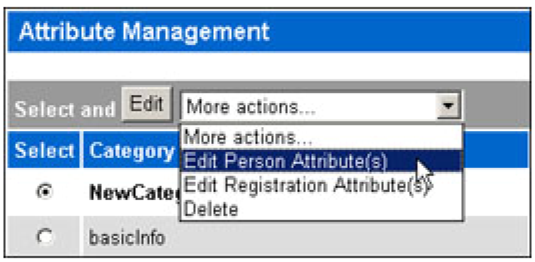
Delete attributes from a category

The default status for all created attributes is Active. Once an attribute is in use, it is strongly recommended that you do not delete the attribute. Instead, it is recommended that you edit the active attribute's status checkbox located in the Basic Information section of data and mark the attribute as inactive. Once an attribute is inactive, it will no longer be presented to users.

However, you may remove an attribute from a category in cases where one has been created in error.

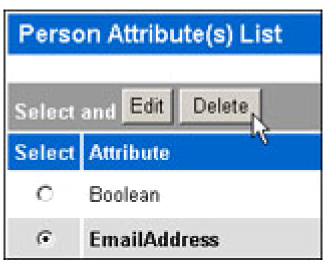
From the Attribute Management page, select the radio button next to the category containing the attribute you wish to delete.

Select the corresponding **Edit Attribute(s)** type from the **More actions...** drop-down box.



From the list of attributes, select the radio button next to the attribute you wish to delete.

Then click the **Delete** button located above the list.



A pop-up box WARNING message will display. Read the message carefully before confirming your choice.

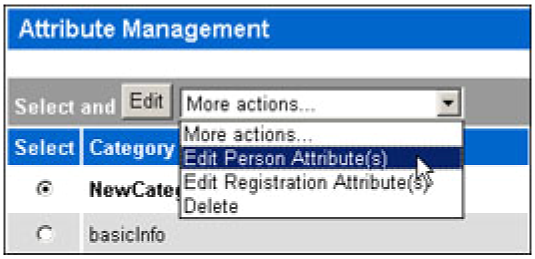
Click **OK** to delete the selected attribute and return to the updated list, or click **Cancel** to return to the list without deleting.

Order of attributes within a category

Within the attribute category and attribute type, you may select the order you want the attributes presented.

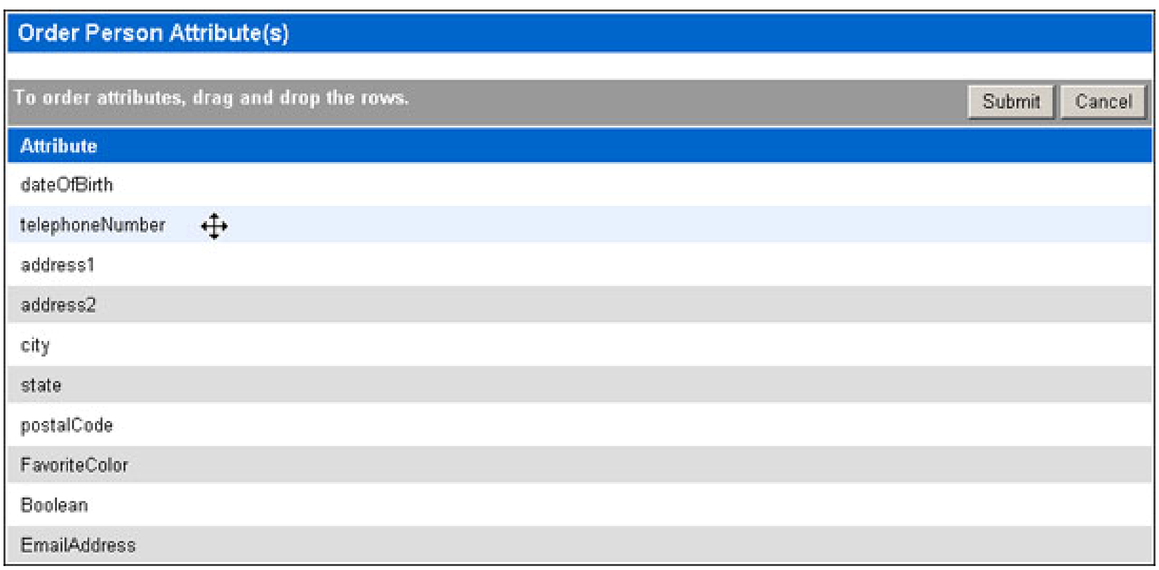
From the Attribute Management page, select the radio button next to the category containing the attribute list you wish to modify.

Select the corresponding **Edit Attribute(s)** type from the **More actions...** drop-down box.

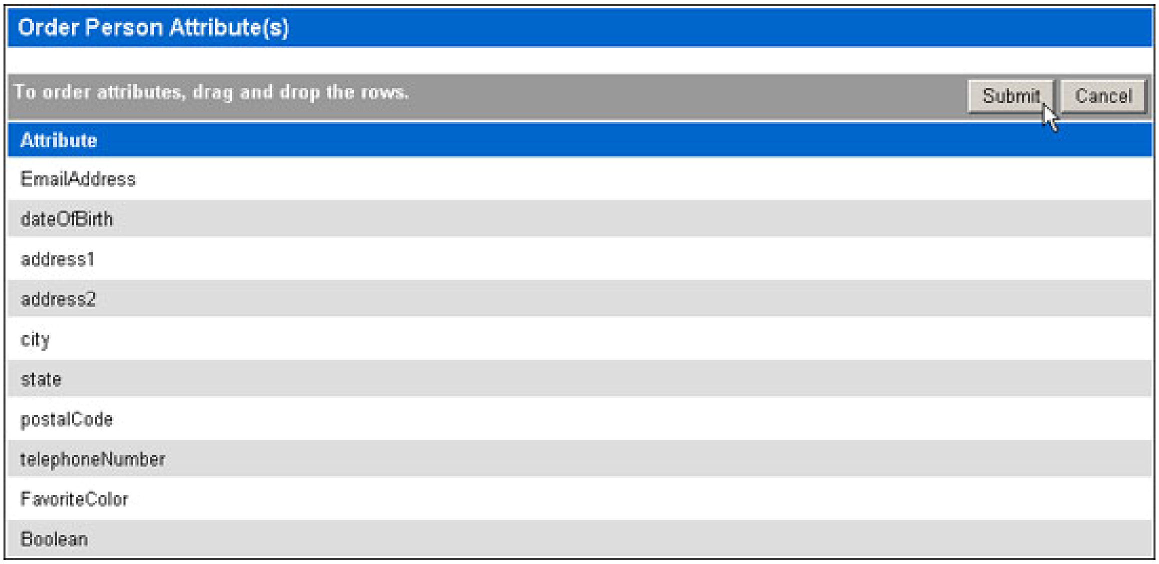


Click the **Order** button located on the far right of the Attributes List screen.

Place the mouse over the Attribute you wish to move. Click and drag the row to the new location and let go of the mouse.



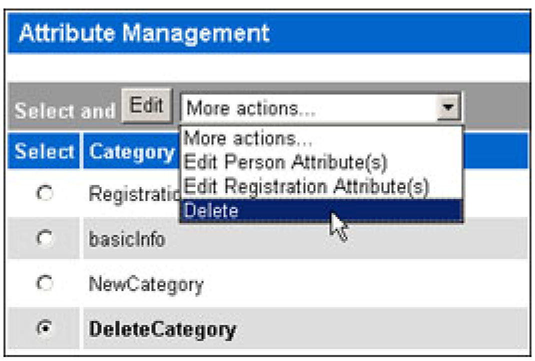
When you are finished arranging the values, click the **Submit** button to save your changes.



Delete a category

To delete an attribute category and associated attributes, select the radio button next to the category you wish to delete.

Then select **Delete** from the "More actions..." drop-down box



A pop-up box WARNING message will display. Read the message carefully before confirming your choice. You cannot retrieve the data that was stored in the category once you have deleted the category.

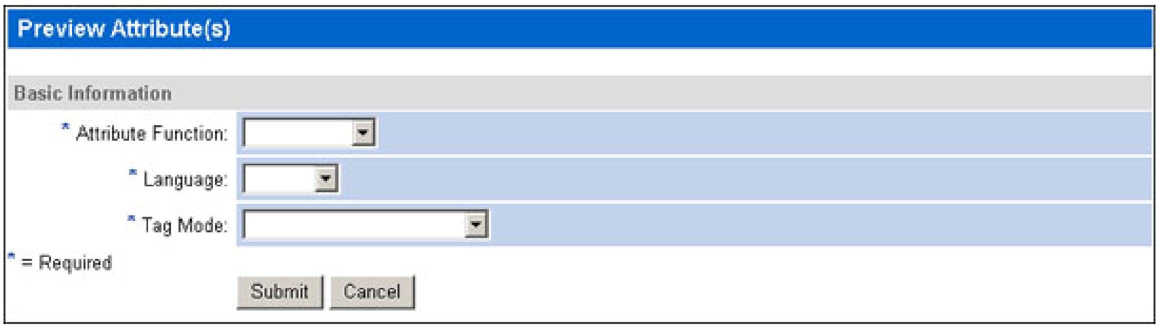
- **NOTE**: If you decide you no longer wish to display the category to the end-user, but you do not want to delete it, disable the **Enable** checkbox for the selected language as described above under "Edit attribute category."

Click **OK** to delete the selected category and return to the updated list, or click **Cancel** to return to the list without deleting.

Preview attributes

To preview the attributes you have set up, click the **Preview** button located on the far right side of the Attribute Management page.

Use the drop-down boxes to make your criteria selections and search for the attributes you wish to preview.



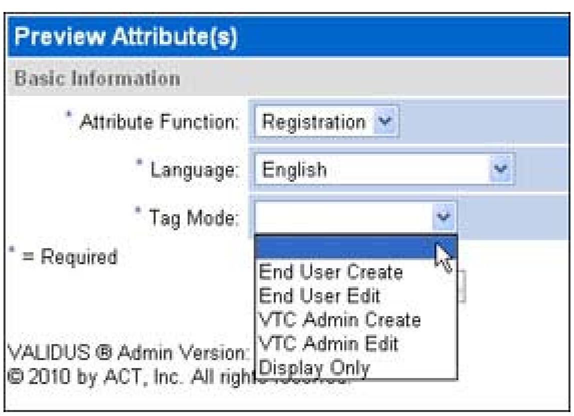
* *Indicates a required field.*

* **Attribute Function**: Select whether you are previewing for a Person or Registration attribute.

* **Language**: Select the language in which you want to view the selected attribute (Additional languages will only appear as an option for realms that have enabled multiple languages in *Realm Management*.)

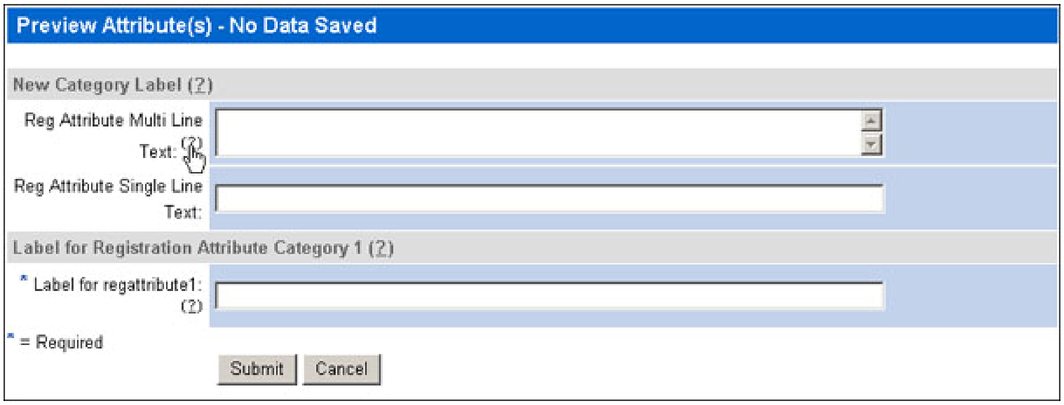
* **Tag Mode**: Select the tag mode characteristic of the attribute you are searching for. (For example, attributes that are accessible by end users during the create or registration process, an end user who may be editing their record, a staff person in VTC Admin during create or edit mode, or attributes in display only.)

Click **Submit** after you have made your selections.



Attributes will be displayed based on the criteria you selected. You will be allowed to interact with the attributes as though you were an end-user.

- In the example shown below, help text was included as part of the attribute. This is indicated by the **(?)** that appears by the category and attribute label fields. If you were to mouse over those question marks, the help text you entered would be displayed as pop-up text on-screen.



Fill in the information as requested. Any required information will be marked as required. If you set up field parameters requesting specific data types, those requirements must be met before you will be allowed to go on. (e.g., field length, character specifications, etc.)

Click **Submit** when you are ready to go on and test attribute setup.

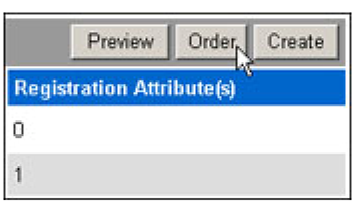
- If an error is detected, you will be asked to correct the error and resubmit the information. If you have set up customized error messages, those will be displayed for you.
- If an error is NOT detected, the application will indicate that under real circumstances, your information would have been submitted successfully.

When you are finished previewing the attribute, click **Cancel** to return to the Preview Attribute(s) selection screen to select new attribute characteristics to preview additional attributes.

If you are finished previewing attributes altogether, click on **Cancel** again to return to the Attribute Management page.

Order of categories

To rearrange the order of your attribute categories, click the **Order** button located on the far right side of the Attribute Management page.



Place the mouse over the Category you wish to move. Click and drag the category row to the new location and let go of the mouse.

When you are finished arranging the categories, click the **Submit** button to save your changes.

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Create Attributes

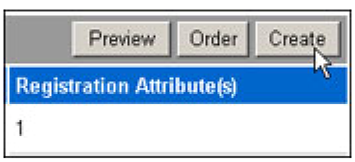
This section describes how to create attribute categories and set up add attributes to those categories. It describes in detail the fields and functionality of each tab.

WARNING: Before changing your attributes, be sure that any User Batch Load files in your realm have finished processing. Any file already in progress will continue processing while the new settings take effect and may cause the file processing to fail. (See the *User Batch Load* topic for more information.)

Create attribute category

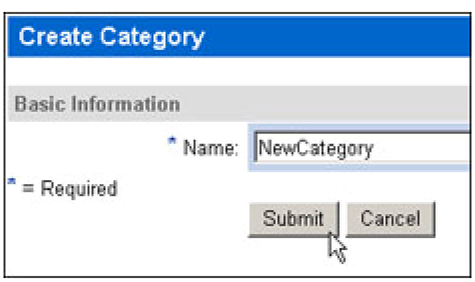
Click **Attribute Management** from the main menu.

Click the **Create** button on the far right side of the Attribute Management page.



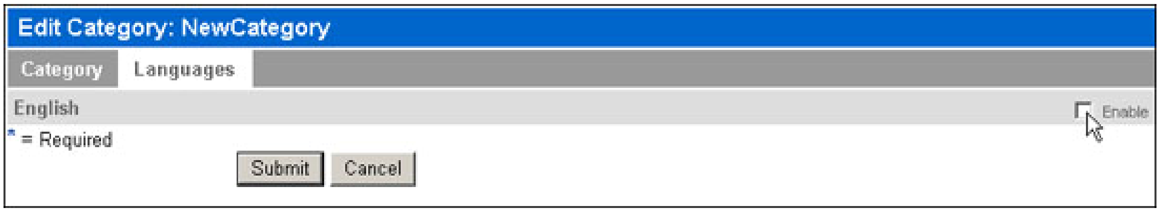
This will open the Create Category screen. Enter a name for your Category using ONLY alphanumeric characters. Spaces are <u>not</u> allowable characters.

Click **Submit** after you have selected a name.



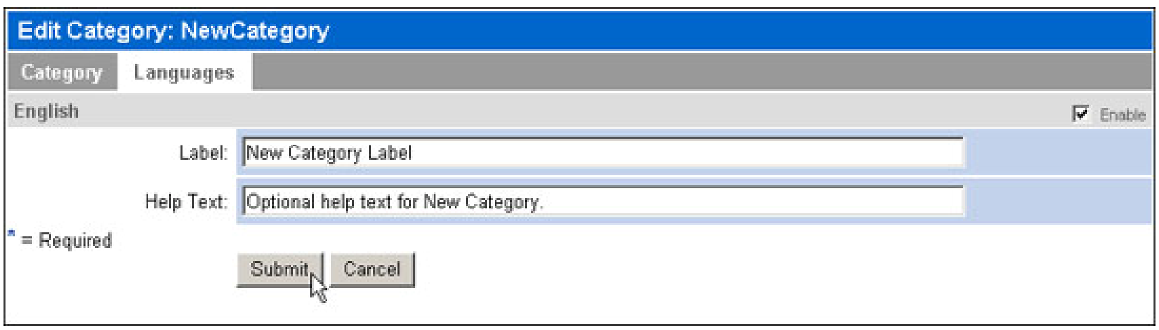
There are two tabs of information associated with each attribute category. The first, "Category", contains the name of your category. The "Languages" tab contains the category label and optional help text fields.

For a language, click the **Enable** checkbox located to the far right of that language if you wish to set up a category label and/or help text for your category.



- If your realm has been set up to accommodate multiple languages, additional rows of labels and help text will be available for each language. Each row can be enabled separately by clicking the **Enable** checkbox.

This will display the label and help text fields as shown below.



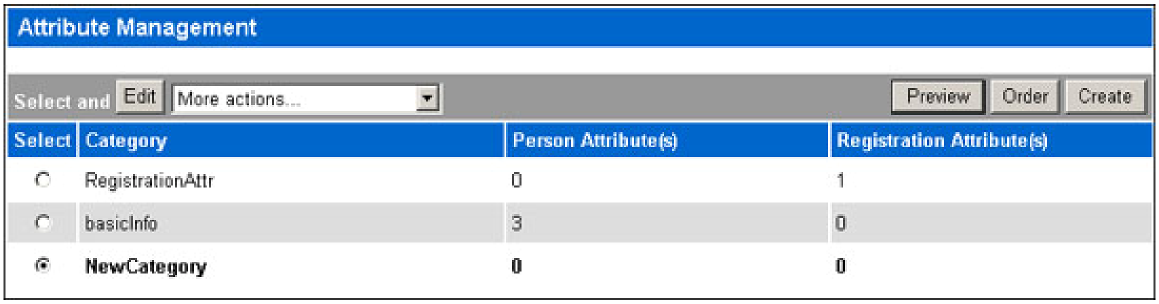
Label: In order for the category to be displayed for an end-user in that language, you must enter a label. When the attributes are displayed for an end user, the Labels are what will be displayed to identify the attribute category. The Label may contain spaces. The category *name* which is stored in the database cannot contain spaces.

Help Text: In order to help users who need to fill in the attribute data, help text can be provided. When the Help Text field is filled in, a **(?)** will appear next to the label when the attribute is shown to the user allowing the user to access the help text.

- **NOTE**: If at any time you decide you do NOT wish to display a category to the end-user, disable the **Enable** checkbox for the selected language.

Click **Submit** when you are finished entering data.

This will return you to the Attribute Management page where your new category will be displayed.



IMPORTANT: Now that you have created your attribute category, you will notice the number of attributes in the category is '0'.

Your next step, which is described below, is to **add attributes to the category**. <u>You must add individual attributes to your new attribute category before it will be useful to you</u>.

Add attributes to a category

Once the attribute category has been created, you must add attributes to the category for it to be useful. There are two types of attributes.

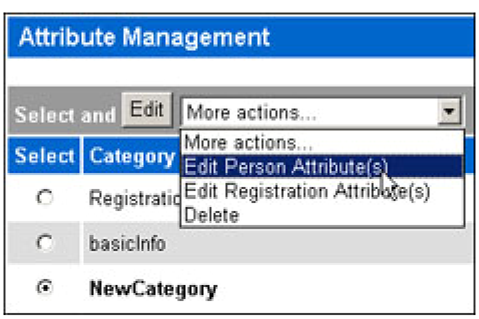
- **Person attributes** are the personal demographic type questions that you would like to gather from examinees and other users. You may specify that a field is required for an examinee to fill in but NOT required in user management when a staff person would be creating an account. This is helpful when creating staff accounts as opposed to examinee or user records.
- **Registration attributes** are the characteristics and questions you can set up as part of registration requirements, linking them to assessments within your realm. When a user is registered for the assessment, they may be required to fill in these attributes before registration can be completed.

Both attribute types are customizable to the needs of your realm.

To add attributes to a category, select the radio button next to the category title.

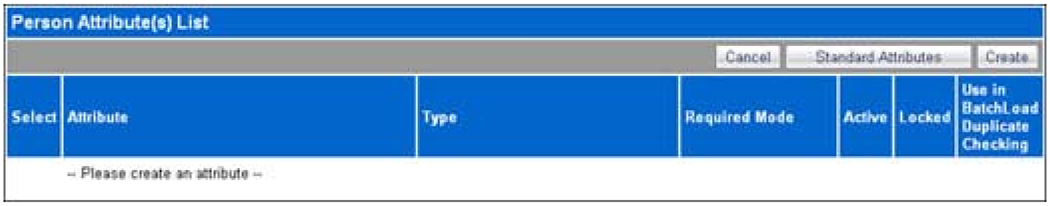
More Actions... (drop-down box)

Click the **More Actions...** drop-down box and select **Edit Person Attribute(s)** or **Edit Registration Attribute(s)**, depending on the type of attribute you wish to create.



If you already have attributes selected for this category, those will be displayed for you.

If you do NOT have attributes selected, you will need to add attributes to your category.



There are two ways to add attributes:

- Clicking **Standard Attributes** will allow you to select from a list of commonly used characteristics that have already been set up for your convenience. The two categories in this topic, "Standard Person Attributes" and "Standard Registration Attributes" describe how to set up attributes already available for selection.
- Clicking **Create** will allow you to create your own customized attributes specific to your realm. The section on "Create customized attributes" describes how to set up your own attributes.

Standard Attributes

Standard Person Attributes

To select from a list of commonly requested characteristics for Person Attributes, click the **Standard Attributes** button located on the far right of the Person Attributes screen.

This will display the list of characteristics already included as part of the VTC Admin Console.

Standard Person Attribute(s) List

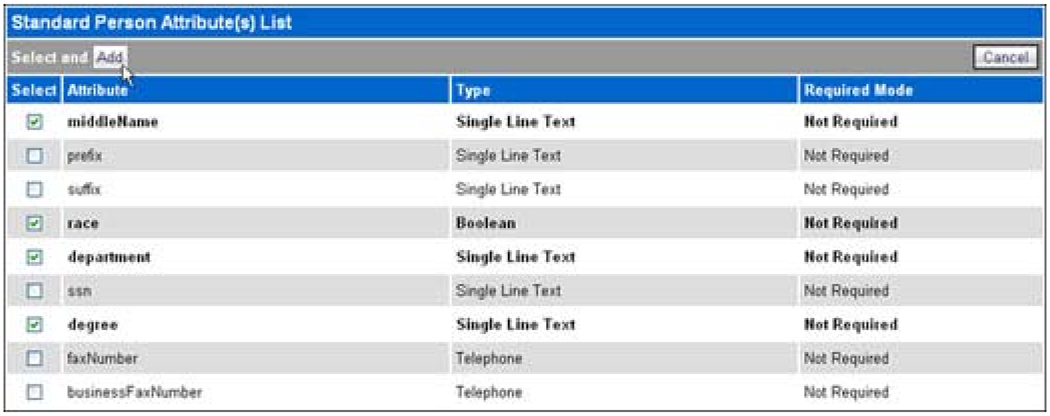
Select and Add | Cancel

Select	Attribute	Type	Required Mode
☐	middleName	Single Line Text	Not Required
☐	prefix	Single Line Text	Not Required
☐	suffix	Single Line Text	Not Required
☐	race	Boolean	Not Required
☐	ethnicity	Predefined List	Not Required
☐	department	Single Line Text	Not Required
☐	ssn	Single Line Text	Not Required
☐	degree	Single Line Text	Not Required
☐	faxNumber	Telephone	Not Required
☐	businessFaxNumber	Telephone	Not Required
☐	address3	Single Line Text	Not Required
☐	zipCode	Single Line Text	Not Required
☐	country	Predefined List	Not Required
☐	gender	Predefined List	Not Required
☐	adaUser	Boolean	Not Required
☐	address1Secondary	Single Line Text	Not Required
☐	address2Secondary	Single Line Text	Not Required
☐	address3Secondary	Single Line Text	Not Required
☐	citySecondary	Single Line Text	Not Required
☐	stateSecondary	Predefined List	Not Required
☐	postalCodeSecondary	Single Line Text	Not Required
☐	zipCodeSecondary	Single Line Text	Not Required
☐	countrySecondary	Predefined List	Not Required
☐	address1Tertiary	Single Line Text	Not Required
☐	address2Tertiary	Single Line Text	Not Required
☐	address3Tertiary	Single Line Text	Not Required
☐	cityTertiary	Single Line Text	Not Required
☐	stateTertiary	Predefined List	Not Required
☐	postalCodeTertiary	Single Line Text	Not Required
☐	zipCodeTertiary	Single Line Text	Not Required
☐	countryTertiary	Predefined List	Not Required
☐	externalId	Single Line Text	Not Required

Select and Add | Cancel

Mark the checkbox to indicate which attribute(s) you wish to use.

Click **Add** to add them to your list of attributes.



Standard Person Attribute(s) List

Select and Add | Cancel

Select	Attribute	Type	Required Mode
☑	middleName	Single Line Text	Not Required
☐	prefix	Single Line Text	Not Required
☐	suffix	Single Line Text	Not Required
☑	race	Boolean	Not Required
☑	department	Single Line Text	Not Required
☐	ssn	Single Line Text	Not Required
☑	degree	Single Line Text	Not Required
☐	faxNumber	Telephone	Not Required
☐	businessFaxNumber	Telephone	Not Required

Your Person Attribute(s) List will be updated to display the attributes you selected.

Person Attribute(s) List

Select and Edit Delete | Cancel Order Standard Attributes Create

Select	Attribute	Type	Required Mode	Active	Locked	Use in BatchLoad Duplicate Checking
○	middleName	Single Line Text	Not Required	Y	N	N
○	race	Boolean	Not Required	Y	N	N
○	department	Single Line Text	Not Required	Y	N	N
○	degree	Single Line Text	Not Required	Y	N	N

If you need to change the requirements or specify parameters for one or more of the attributes you selected, click the radio button next to the attribute you wish to change. Click **Edit**.

Use the Attribute, Languages, and Values tabs (for list attributes only) as described below under "Create customized attributes" to continue setting up your attribute.

- **Special note about the person attribute External ID**: The External ID field can only be used ONCE within a Realm. This is intended for Realms to request an ID or value not already set up in the VTC application. (e.g., School ID number, a specific Customer ID, etc.).

  Return to the menu shown above. Click the radio button next to **External ID**. Then click **Edit** to complete setup of your External ID attribute.

  Use the Attribute and Languages tabs as described below under "Create customized attributes" to define the External ID attribute.

STANDARD REGISTRATION ATTRIBUTES

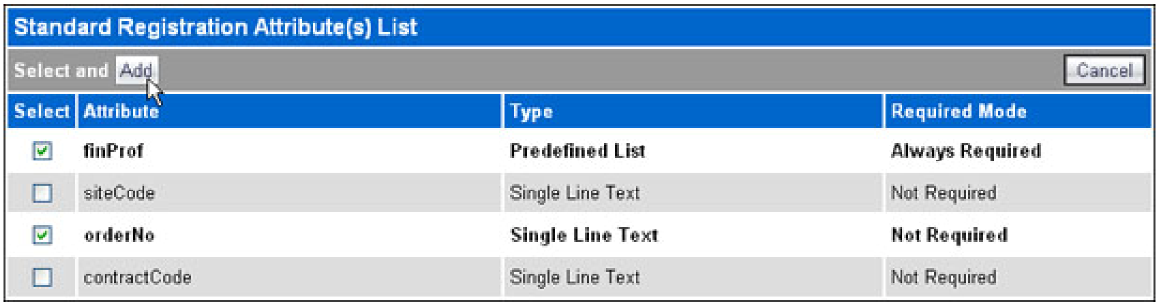
To select from a list of requested characteristics for Registration Attributes, click the **Standard Attributes** button located on the far right of the Registration Attributes screen.

This will display the list of characteristics already included as part of the VTC Admin Console.

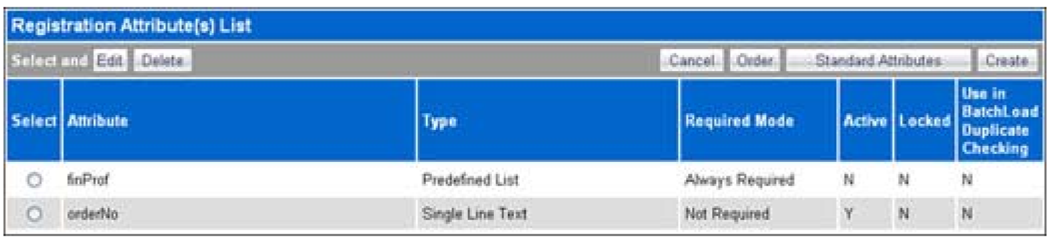
Mark the checkbox to indicate which attribute(s) you wish to use.

- **NOTE**: If you wish to enable the Registration Financial Profiles capability in the VTC Admin Console, you *must* set up the standard registration attribute "finProf" and define the registration values (profiles) that users will select.

Click **Add** to add the attribute(s) to your list of attributes.



Your Standard Registration Attribute(s) List will be updated to display the attributes you selected.



If you need to change the requirements or specify parameters for one or more of the attributes you selected, click the radio button next to the attribute you wish to change. Click **Edit**.

Use the Attribute, Languages, and Values tabs (for list attributes only) as described below under "Create customized attributes" to continue setting up your attribute.

- **Special note about the registration attribute finProf**: The finProf attribute is a predefined list type. You must define the values on that list before finProf will be fully functional.

  Return to the menu shown above. Click the radio button next to **finProf**. Click the **Edit** button located above the list of registration attributes to complete setup of your finProf attribute.

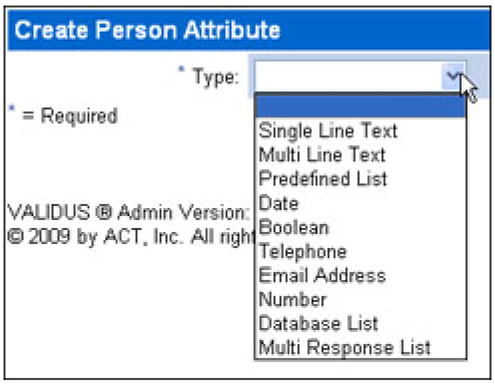
  Use the Attribute, Languages, and Values tabs as described below under "Create customized attributes" to define the finProf attribute.

Create customized attributes

If you find that you need attributes in addition to or instead of the Standard Attributes, click the **Create** button located on the far right side of the Person or Registration Attribute list.

There are several types of attributes to choose from and several ways you can set up a single attribute. (The examples shown are for Create Person Attributes but the same process is used when creating Registration Attributes.)

Select the Attribute **Type** from the drop-down box.



Single Line Text: One-line prompt with room for a one-line or one-word answer.

Multi Line Text: One-line prompt with multiple lines for answers.

Predefined List: One-line prompt with a pre-defined list of answers that will be presented to the user in drop-down box format.

Date: One-line prompt with various date formats available for selection, or set up your own format preference.

Boolean: One-line prompt with a single checkbox.

Telephone: One-line prompt with telephone number formatted text-entry boxes.

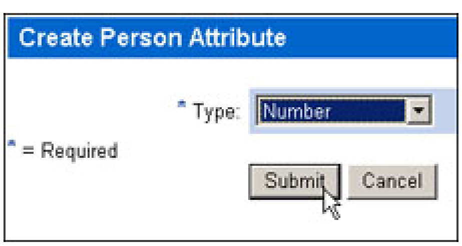
Email Address: One-line prompt with a room for one-line answer.

Number: One-line prompt with a room for one-line numerical answer. Several numerical formats are available for selection or you may opt to set up your own format.

Database List: *Not in use at this time.*

Multi Response List: One-line prompt with a pre-defined list of options that will be presented to the user in checkbox format. Users may select one or more options. Data is stored and returned as a single vertical bar '!' separated string. (e.g. 'A!B!D'.)

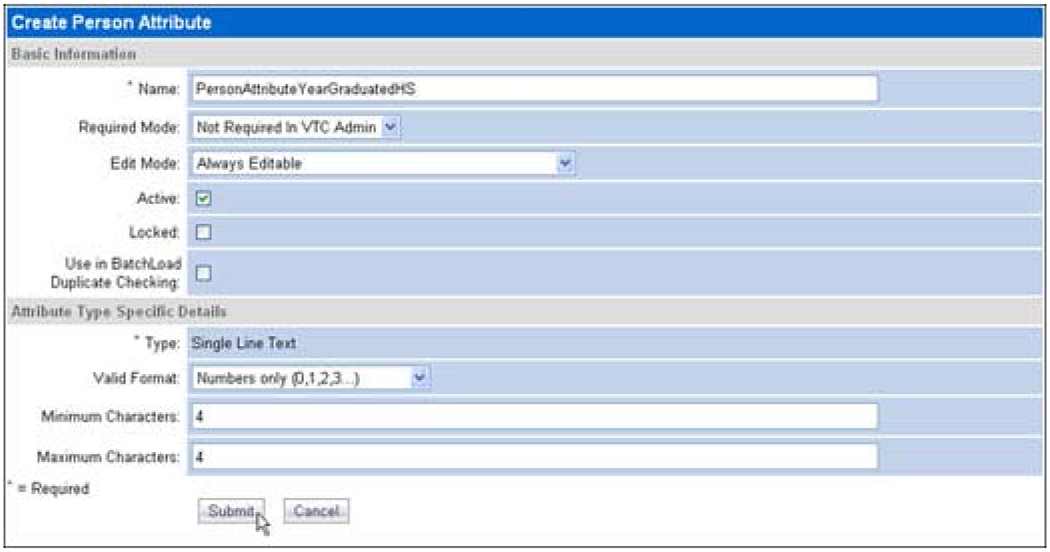
Click the **Submit** button after you have made your selection.



Attribute tab

This will display the Create Attribute screen for the attribute type you selected.

- The Basic Information data fields are the same for each type.
- The Attribute Type Specific Details will vary. All are described below.



** Indicates a required field.*

BASIC INFORMATION

* **Name**: Enter a name for your attribute using ONLY alphanumeric characters. Spaces are <u>not</u> allowable characters.

Required Mode: Use the drop-down box to indicate whether an attribute is a required field at all times, not required in VTC Admin (e.g., for staff persons creating user accounts), or not required at all.

Edit Mode: Use the drop-down box to indicate whether an attribute is editable by an end user, editable only in user management, hidden to the end-user, or not editable by the end-user. If it is marked not editable, it would become a display-only field after it has been entered. If you are a VTC Admin you have the option to mark the field as editable by VTC Admin only.

Active: The default status for all created attributes is Active. It is recommended that rather than deleting attributes, especially once they have been in use, they are marked inactive.

Locked: This field may only be set as locked by an Ultra User. Once an attribute is locked, it may not be edited or deleted by a user who is only assigned the Attribute Manager role.

Use in Batch Load Duplicate Checking: When user records are batch loaded, duplicate records can be ignored and will not be loaded into the system. Mark this checkbox if you want to use the attribute during a check for duplicate records. Leave it blank and the batch load check for duplicate records will skip this field.

ATTRIBUTE TYPE SPECIFIC DETAILS

*** Type**: Display-only field that shows the type of attribute you selected.

Valid Format: Select one of the pre-defined format types from the drop-down box. Or, if available, select "Use your own format" and define a format of your own.

Custom formatting is available for Single Line Text, Date, and Number fields. The Valid Format field allows a user to specify the format used for collecting data. If the string entered by the user matches the custom format, then the data is accepted. Otherwise it will be flagged as an error.

It's recommended that you contact your ACT Account Representative before using this functionality.

For information about regular expressions, please see http://en.wikipedia.org/wiki/Regular_expression

- **NOTE**: By clicking on the above link, you will leave this ACT-sponsored website. ACT is not affiliated with Wikipedia and cannot endorse the content of the pages contained therein.

Number of Rows: Specific to the Multi Line Text attribute type, specify the number of rows that should be made available to the end-user.

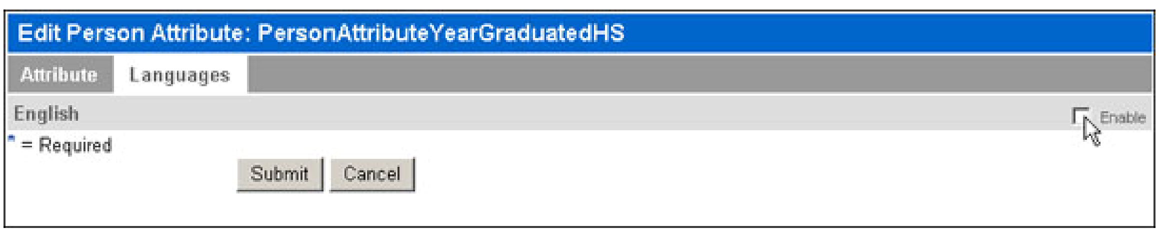
Minimum/**Maximum Value or Characters**: Specify the range of characters in the fields that you will accept.

When you are finished setting up your attribute characteristics, click the **Submit** button to continue.

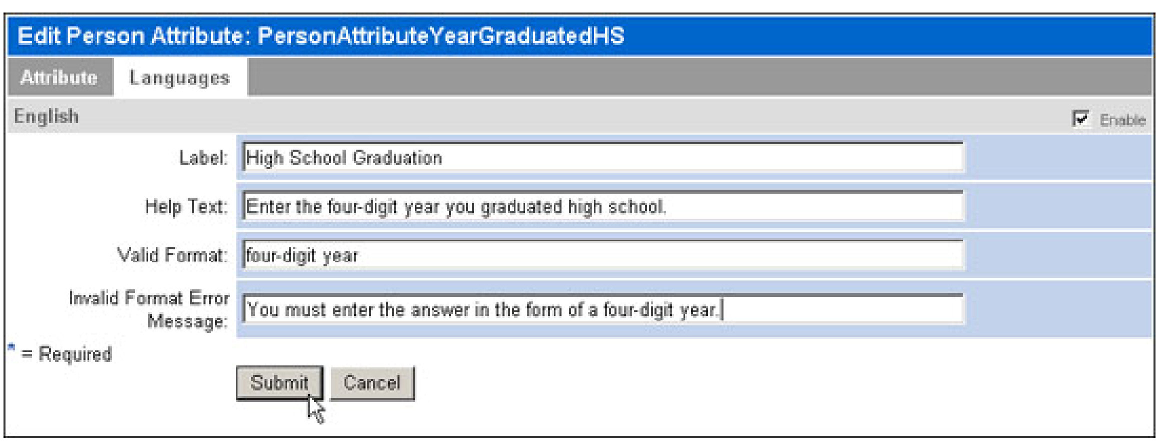
Languages tab

There are at least two tabs of information associated with each attribute type. The first, "Attribute", contains the name of your attribute. The "Languages" tab contains the attribute label, optional help text, and valid format and invalid format error message fields as shown below.

Click the **Enable** checkbox located to the right of the language to set up an attribute label and/or help text for your attribute.



This will open the Languages tab where you can enter the label and optional help text data.



Label: In order for the attribute to be displayed for an end-user in that language, you must enter a label. When the attributes are displayed for an end user, the Label is what will be displayed to identify the attribute. The Label may contain spaces. The attribute *name* which is stored in the database cannot contain spaces.

Help Text: In order to help users who need to fill in the attribute data, help text can be provided. When the Help Text field is filled in, a **(?)** will appear next to the label when the attribute is shown to the user allowing the user to access the help text.

Valid Format: (This will appear on the Languages tab for the Single Line Text, Date, and Number attribute types.) The data entered in this field will overwrite the default format on the attribute, if applicable.

For example, in a date field where the default format is "MM/dd/yyyy" and the Valid Format entered for the Spanish language is "dd/MM/yyyy", if the user is using the Spanish language, that date field will be validated against "dd/MM/yyyy" instead of "MM/dd/yyyy".

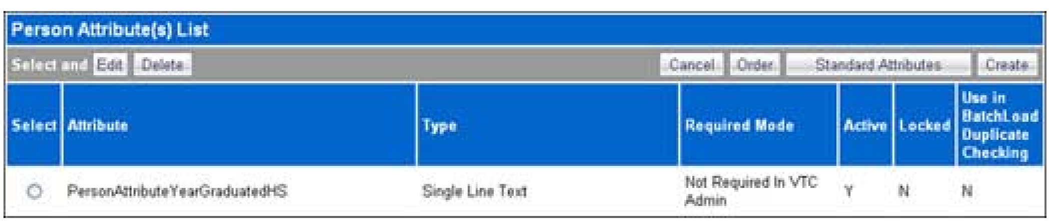
Invalid Format: (This will appear on the Languages tab for the Single Line Text, Date, and Number attribute types.) The data entered in this field will overwrite the default format validation error message that would normally appear for the attribute in the event of an error.

For example, if you define a custom format for a Single Line Text that allows all characters with no spaces, the default format validation error message would be “[name of the attribute] does not meet the required format.” If you input the message, “This attribute may not contain spaces,” using the correct language, that error message would be displayed to better explain the format validation.

- **NOTE**: If at any time you decide you do NOT wish to display the attribute to the end-user, disable the **Enable** checkbox for the selected language.

Click **Submit** when you are finished entering data.

Unless you are creating a Predefined List or Multi Response List attribute, this will return you to the Attribute list where your new attribute will be displayed as shown.



Person Attribute(s) List

Select and Edit Delete | Cancel Order Standard Attributes Create

Select	Attribute	Type	Required Mode	Active	Locked	Use in BatchLoad Duplicate Checking
○	PersonAttributeYearGraduatedHS	Single Line Text	Not Required In VTC Admin	Y	N	N

If you are creating a list attribute, please continue to follow the steps below.

Values tab (for list attributes only)

The following instructions ONLY apply to attribute types Predefined List and Multi Response List.

If you selected an attribute type PREDEFINED LIST or MULTI RESPONSE list, you will have access to a third tab following the Languages tab. The **Values tab** allows you to define the items presented on the list.

- Predefined list values are presented to an examinee in a selection drop-down box. Users may select only one.

- Multi response list values are presented in a checkbox format. Users may select one or more options.

You have two ways you can enter values.

- Create them individually.
- Batch Load a pre-defined CSV file.

Once values have been entered into the system, you will have the opportunity to arrange the order in which they are presented.

ENTER ATTRIBUTE VALUES INDIVIDUALLY

To build the list items one at a time, use the drop-down box located on the far right of the Edit Attribute, Values tab screen to select **Create**.

This will display the Create Attribute Value screen.

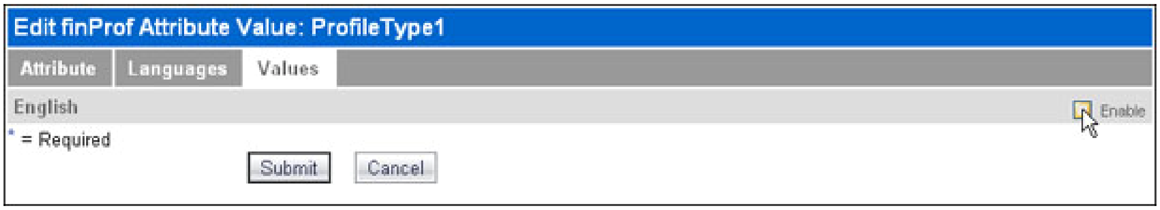
*** Name**: Enter the name of your first item. As with other items in the attribute section, spaces are <u>NOT</u> allowable characters.

Active: The default status for all created values is Active. It is not possible to delete values. Instead, they are marked inactive and are not displayed.

Click **Submit** when you are finished.

Next you will need to set up your drop-down labels for your list of items. <u>You must complete this step so that your list will display properly</u>.

Click the **Enable** button located on the far right for that language as shown below.

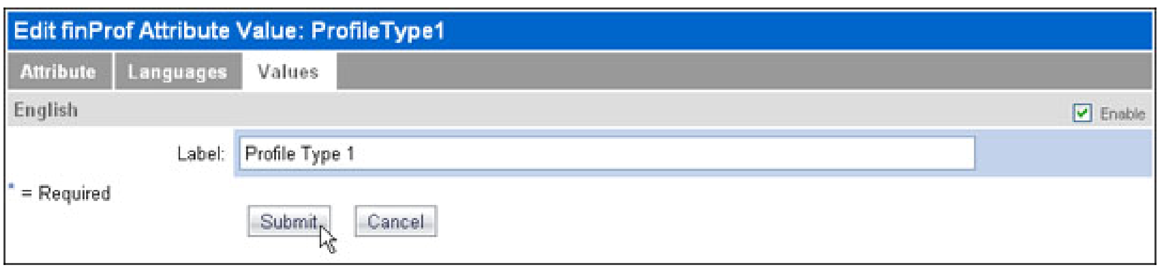


- If your realm has been set up to accommodate multiple languages, additional rows of labels will be available for each language. Each row can be enabled separately by clicking the **Enable** checkbox.

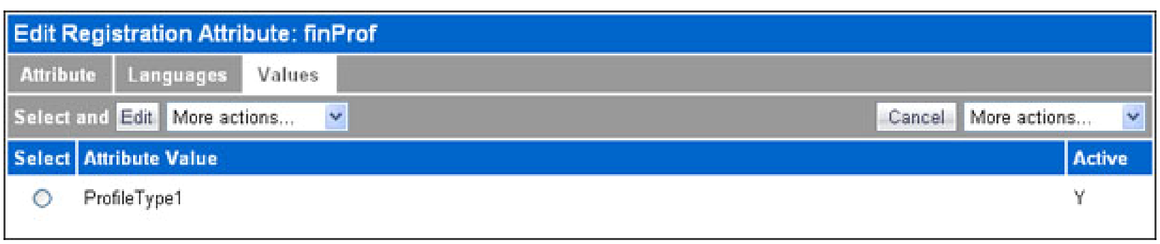
Enter the label for your value.

- In order for the value to be displayed for an end-user in that language, you must enter a label. When the values are displayed in list format to the end user, the Label is what will be displayed to identify the value. The *Label* may contain spaces and is ultimately the value displayed in the drop-down box to the end-user. The value *Name* which is stored in the database cannot contain spaces.

Click **Submit** when you are finished.



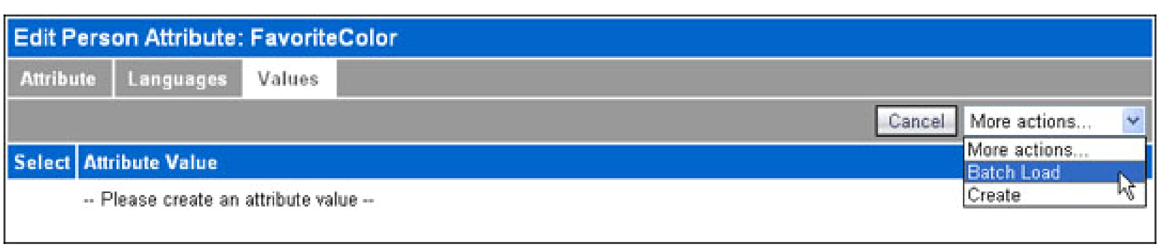
This will return you to your list of values where your new value will be shown.



Continue entering values until you are satisfied with your list.

BATCH LOAD ATTRIBUTE VALUES

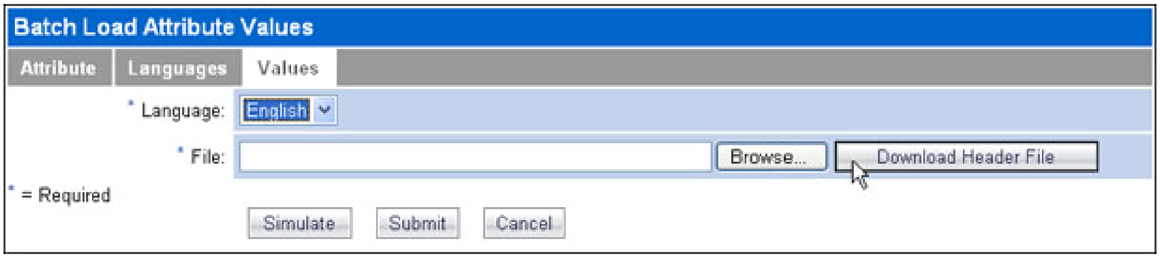
To build the list items by batch entering them at once, use the drop-down box located on the far right of the Edit Attribute, Values tab screen to select **Batch Load**.



This brings you to the Batch Load Attribute Values screen.

First, you need to download a template you can use to create a title record file.

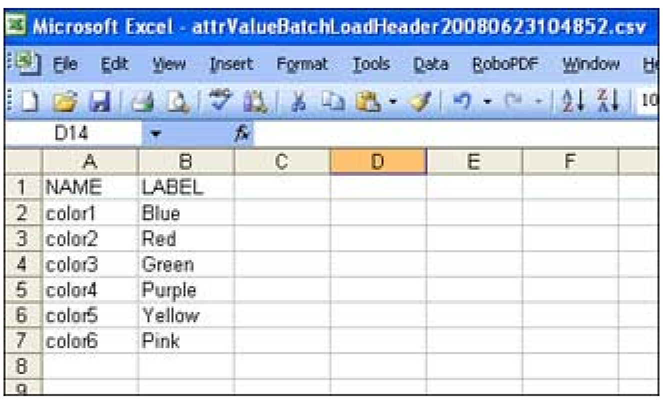
Click **Download Header File** to download a CSV (comma separated values) file.



A download pop-up dialog will appear. Click to **Save** the file to a location on your network or hard drive, and then click to **Open** it using a CSV file editing tool such as Microsoft® Excel®.

- **Excel users**: see Appendix A: Handling CSV Files for more information about creating and handling CSV files.

Fill out the fields with allowable values for your Batch Titles as shown in the example below.



- *You may use any CSV file editor to display and generate CSV header files.*

The *Label* may contain spaces and is ultimately the value displayed in the drop-down box to the end-user. The value *Name* which is stored in the database cannot contain spaces.

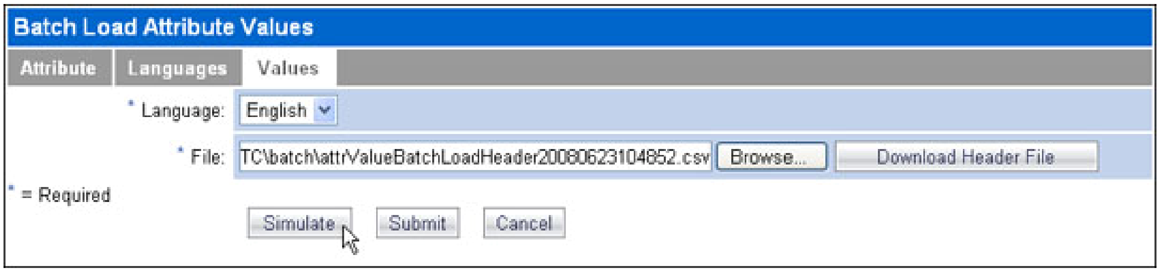
Save your spreadsheet data in .CSV format.

When you are ready to upload the file you created, return to the **Batch Load** screen.

Use the drop-down box to select the **Language** of the file you are uploading.

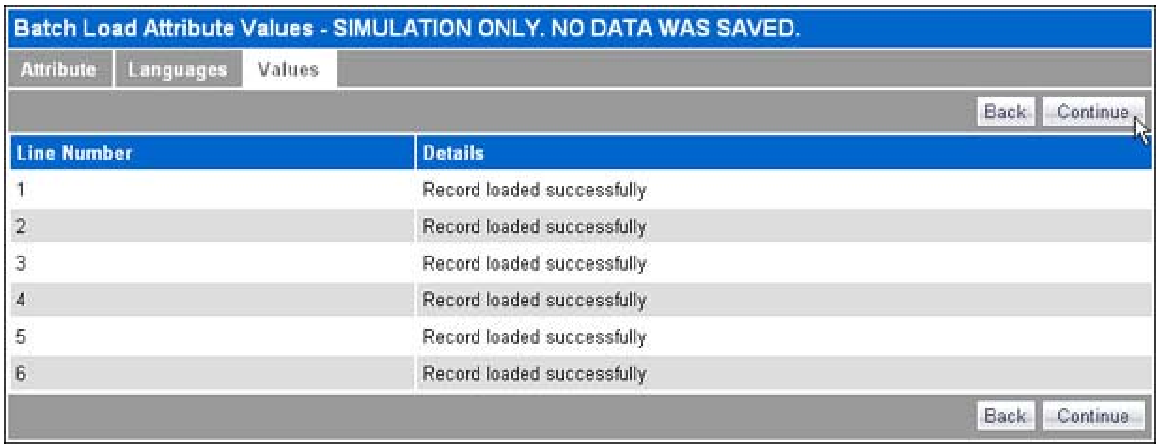
Click **Browse** and select the location of the CSV file you wish to upload.

Once you have selected the file to upload, it is recommended that you click the **Simulate** button to test the data format of your file before uploading any real data.



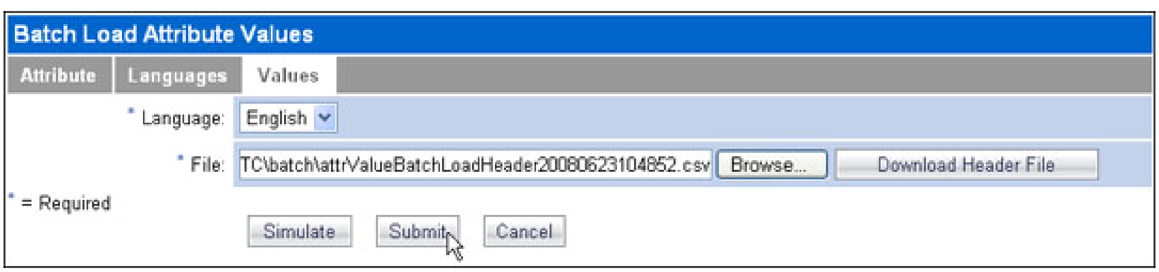
The data you plan to import will be displayed on-screen along with a message that NO DATA WAS SAVED during the simulation.

If the data is valid, click the **Continue** button and begin the **Batch Load** process again.

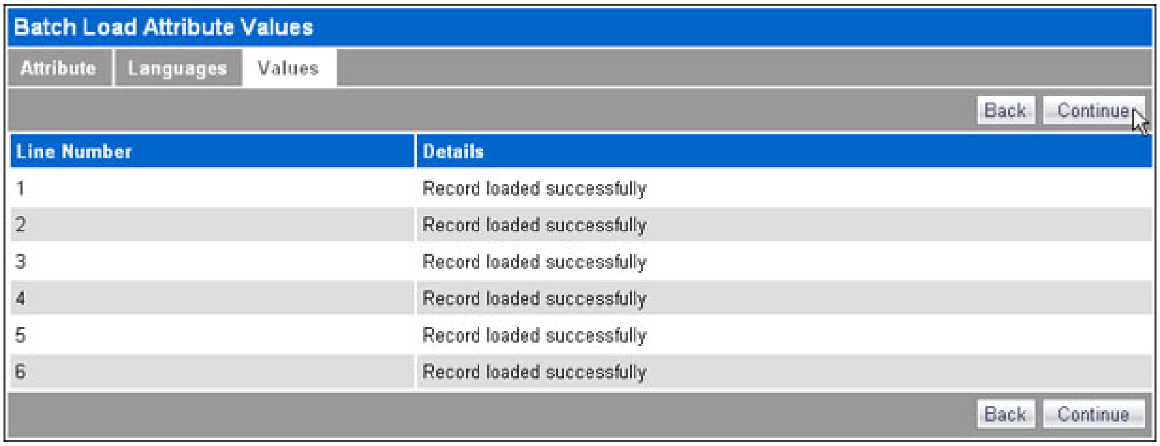


- If there are any errors, the line number title containing the error will be shown. If the data is invalid, click **Back**, correct the errors in the data file, and simulate the batch upload again.

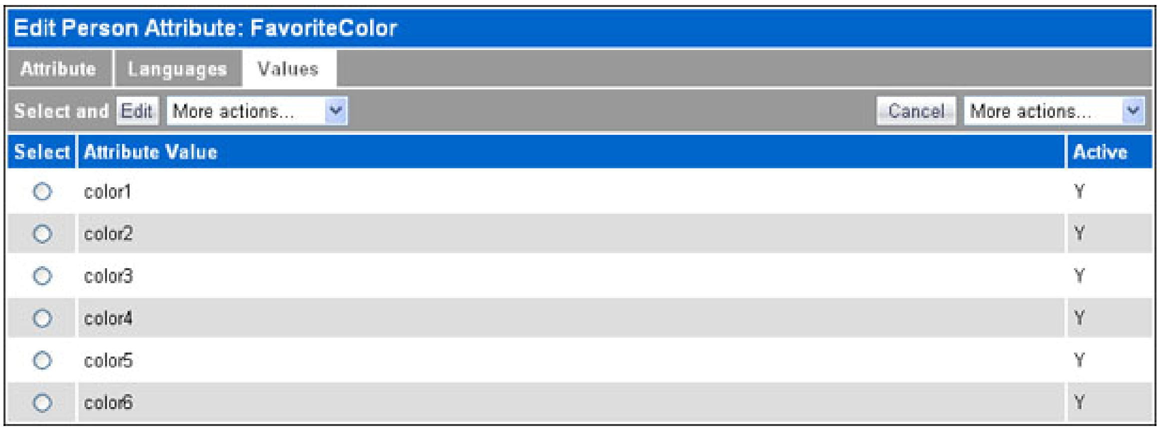
After you return to the Batch Load screen and reselect your CSV file to upload, do not click "Simulate." Instead, click the **Submit** button to upload the values to the system.



The data you imported will be displayed on-screen.



Click **Continue** to view your list of imported values.



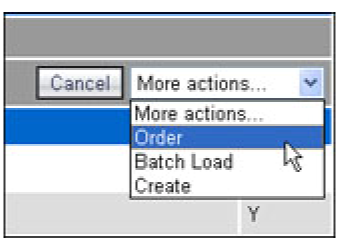
ORDER OF VALUES

Values on a predefined list will be presented to examinees in a drop-down box.

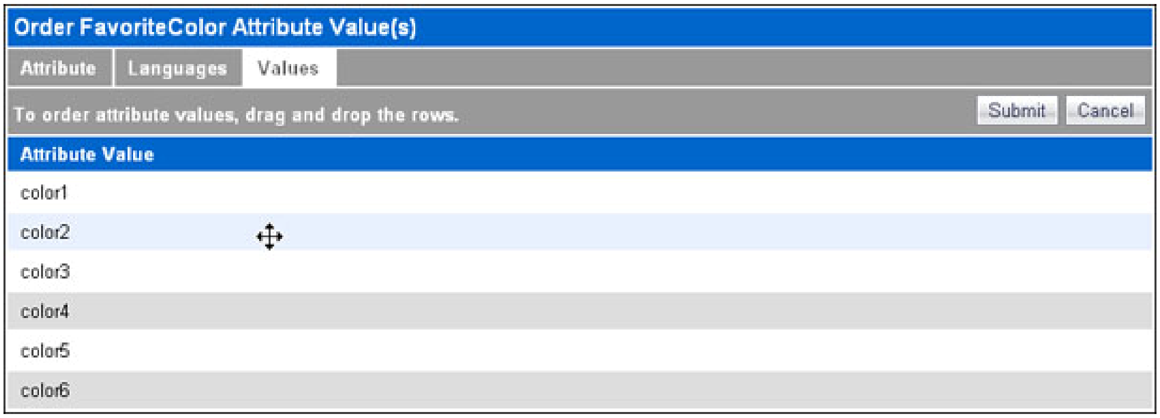
Values on a multi response list will be presented with a checkbox next to each option.

Once your list of values has been entered, you may wish to select the order in which the values are presented.

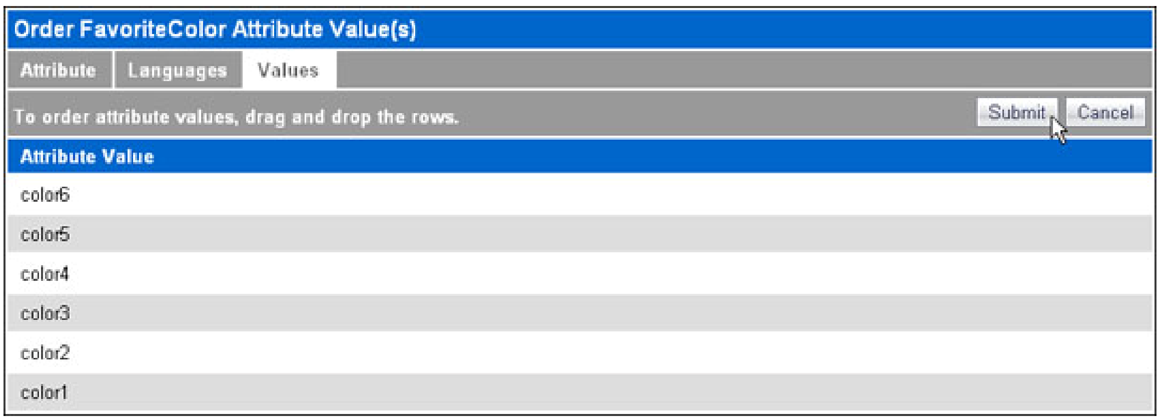
Use the drop-down box located on the far right of the Values tab screen to select **Order**.



Place your mouse over the Attribute Value you wish to move. Click and drag the value row to the new location and let go of the mouse.

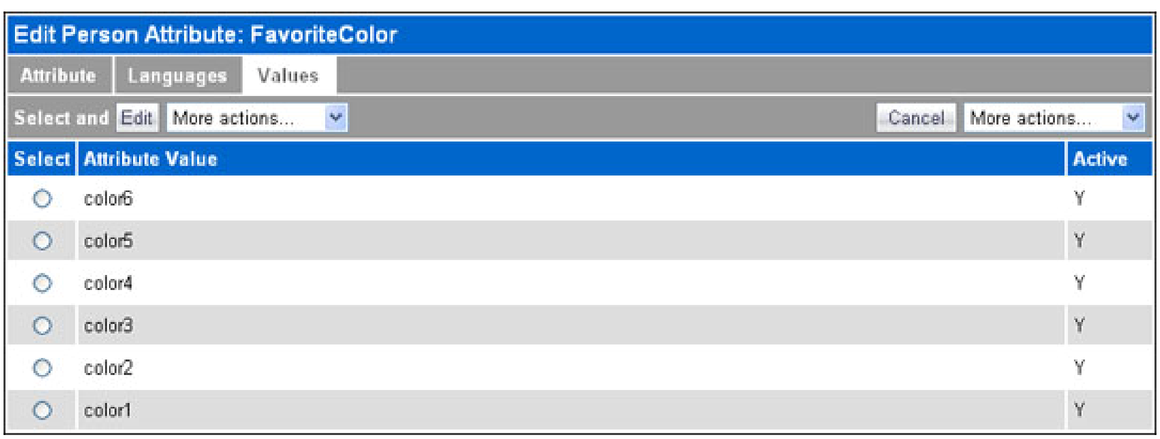


When you are finished arranging the values, click the **Submit** button to save the changes.



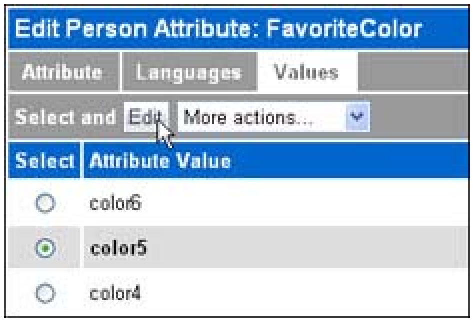
DEACTIVATE/REACTIVATE VALUES

The default status for all created values is Active. It is not possible to delete values. Instead, they may be marked as inactive after which they are no longer displayed to users. The active status will be indicated with a **Y** or **N** in the active column in the values list as shown below.

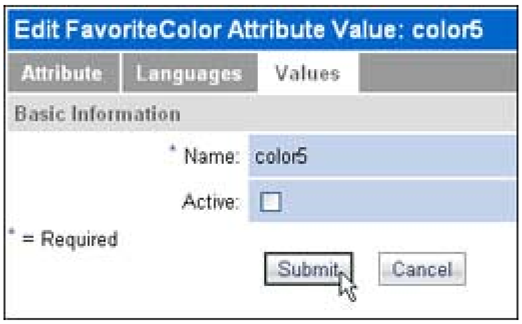


To deactivate or reactivate an attribute value for an item in a predefined list, select the radio button next to the attribute value you wish to deactivate/reactivate.

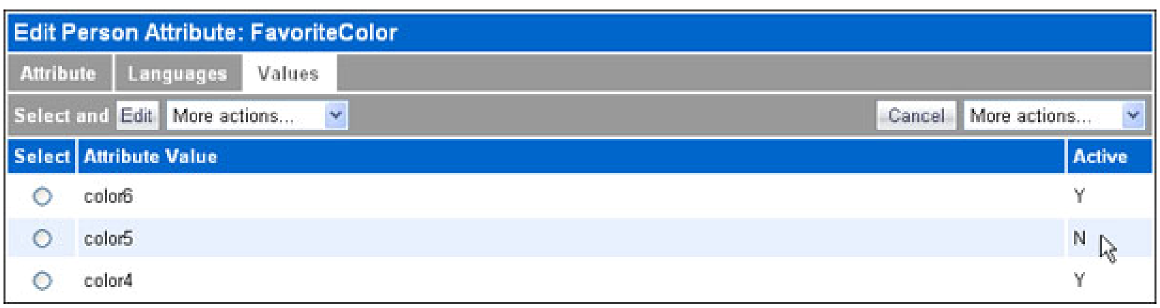
Click the **Edit** button located above the list of values in the values tab.



Mark the checkbox to change the active status and click **Submit**.



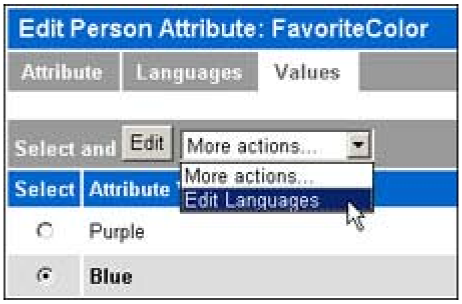
The updated status will be displayed in the active column.



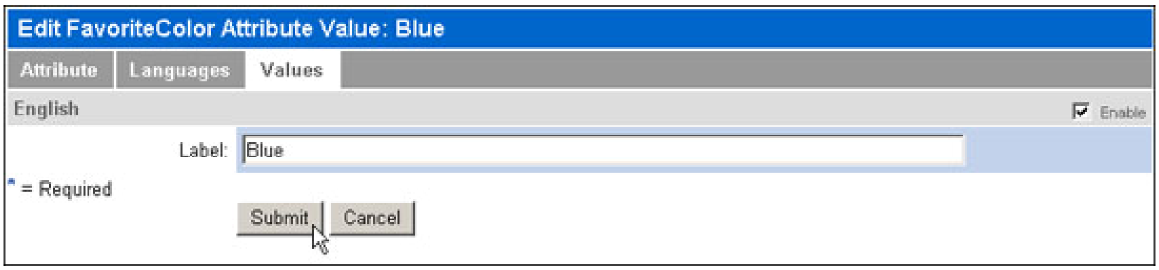
EDIT VALUES LABEL

To edit the displayed label that appears in the drop-down box, select the radio button next to the attribute value you wish to modify.

Then select **Edit Languages** from the **More actions...** drop-down box.



Enter a new name for the label if you wish. Click **Submit** when you are finished.



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Assessment Management Overview

The **Assessment Management** page allows you to define the test Title(s), scoring messages, registration and scheduling requirements associated with each assessment, and to define the Administration date windows during which examinees must register for, be scheduled for, and actually take the required assessment(s).

The following components must be defined before you can begin registering users, scheduling exams, and launching assessments:

- First, the **Title** is the individual test. The Titles required by your realm should already be loaded into the VTC application by ACT staff.
- Second, the **Administration** defines the set of date windows within which various activities occur.
    - For example, when a candidate/examinee may register or be registered with VTC indicating they want to take a test, when the examinee may schedule or be scheduled for a test, and when the examinee may log in and take the actual test.
- Finally, the **Assessment** is the personalization of how the Title or set of Titles will be delivered within the Realm. These are the items that are launched when an examinee is ready to take the exam.
    - The registration and scheduling requirements for each assessment (such as automatic or manual registration) define the registration process available to examinees.
    - An optional part of setting up an assessment is verifying or modifying the **Score Messages** which provide additional information to the examinee about the usage and meaning of the assessment scores. These messages are included on the Instant Score Report after an assessment has been completed.

      NOTE: Score messages are not used by all VTC clients.

Registering and Scheduling Examinees for an Assessment

As part of setting up the assessment, each realm can decide how to handle the examinee registration and scheduling process.

Examinees can register for assessments one of three ways:

- If the assessment is set up for auto-registration, users will be registered when the user record is created.
- A staff person with User Management access to the VTC Admin Console can make the arrangements for the examinee.
- Users can log onto the RSP application to register for the exam and arrange payment (if a test fee is required).

Realms that require examinees to schedule a time to take the exam can have the scheduling process completed by examinees or by a staff person with User Manager access.

- If you require additional information about how to register and schedule examinees, please refer to the "Registration tab" in the *Create a New User* topic.

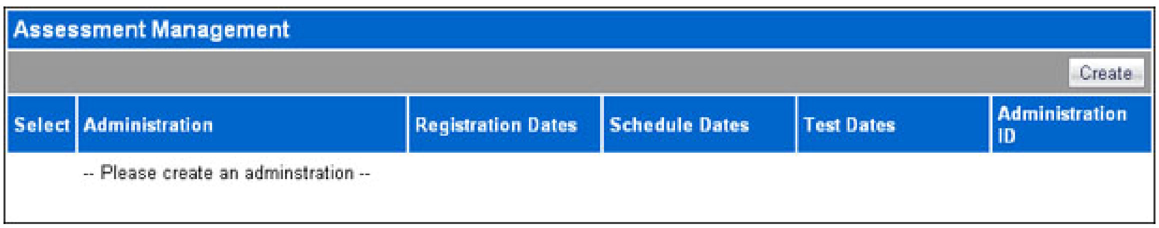
Assessment Management

User Role Access: Ultra User, Assessment Manager, Attribute Manager, Finance Manager (to set payment options)

- *The Attribute Manager role can only set up and edit the attributes associated with the assessments.*
- *The Finance Manager role must be used in conjunction with the Assessment Manager role in order to set assessment payment options.*

The **Assessment Management** page will help you view, edit, or delete existing assessments, testing parameters, and test administration windows, and to create new ones. You may also email registered examinees using predefined templates and manage the requested attributes associated with each assessment.

If there are no assessments or test administrations listed, you will need to create one.



- Edit an assessment
    - Edit test administration dates
- Copy an assessment
- Edit associated assessments
    - Edit assessment details
- More Actions... (drop-down box)
    - Edit Attributes
    - Edit Score Messages
    - Edit Realm Entities
    - Copy Realm Entities
    - Email registered examinees
    - Delete assessments
- Delete a test administration and associated assessments

See also: Create a New Assessment

Edit an assessment

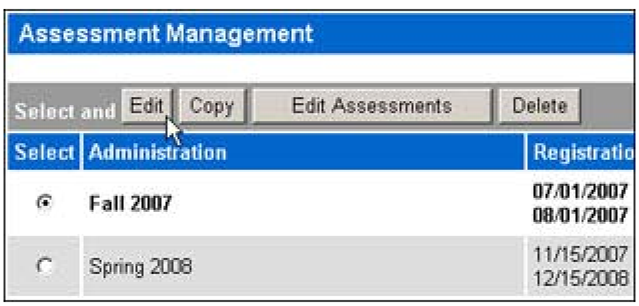
Click **Assessment Management** from the main menu. Unless you are starting a new realm, any existing test administrations will be listed for you.

- Information on creating assessments can be found in the topic *Create a New Assessment*.

Edit test administration dates

To edit the assessment's test administration dates, select the radio button next to the administration name you wish to modify.

Click the **Edit** button, located above the administration list.



Enter new dates for the test administration windows.

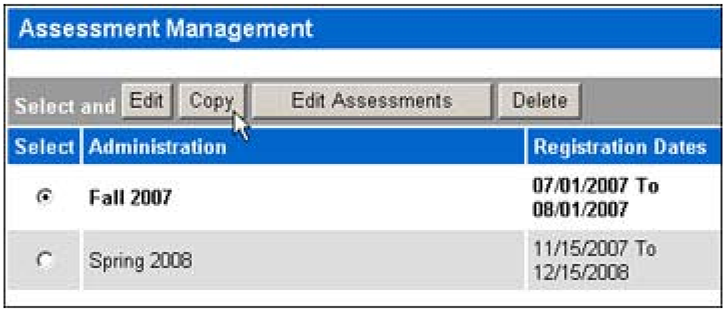
- For detailed information about the administration date fields, please refer to the section "Set up test administration dates" in the *Create a New Assessment* topic.

Click **Submit** when you are finished (or on **Cancel** if you do not wish to make changes) to return to the Administration list.

Copy an assessment

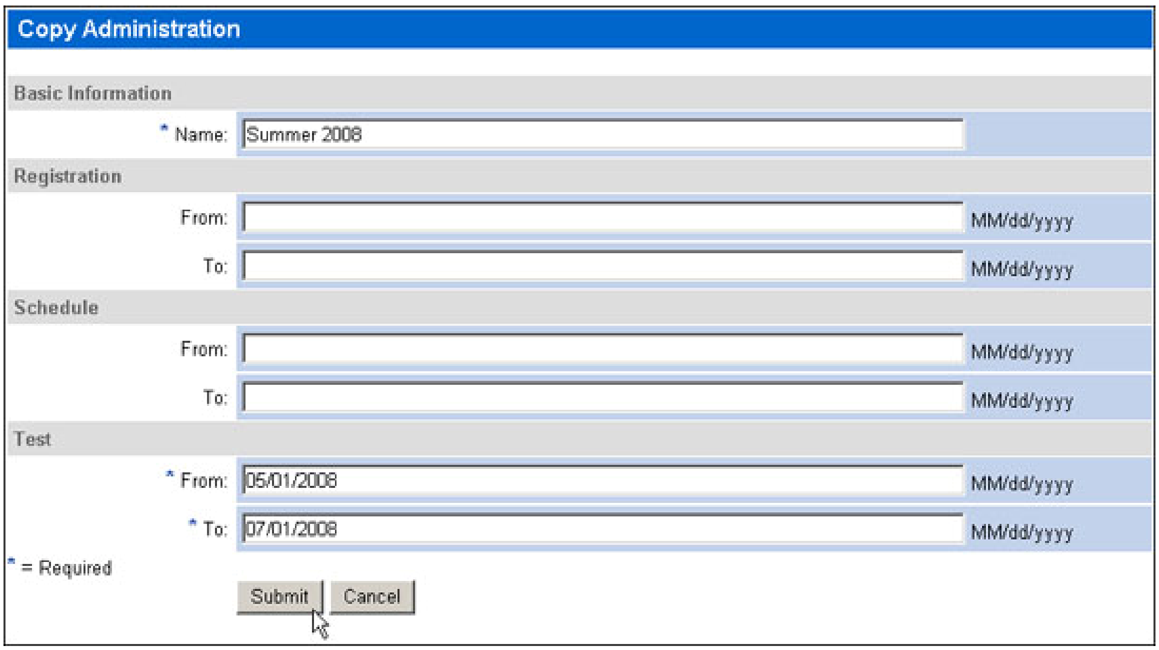
To copy an administration (test assessment setup only), select the radio button next to the administration name you wish to modify.

Click the **Copy** button, located above the administration list.



Copying an administration ONLY copies the test title and test assessment setup. It does <u>not</u> copy the administration date setup.

Enter a new name for your administration and enter dates where applicable in the registration, schedule, and test fields.



- For detailed information about the administration date fields, please refer to the section "<u>Set up test administration dates</u>" in the *Create a New Assessment* topic.

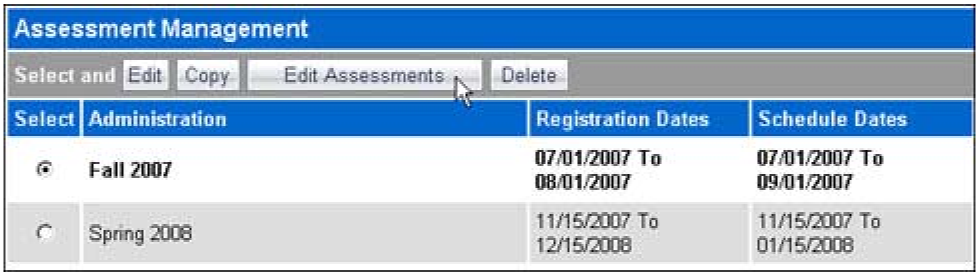
Click **Submit** when you are finished to return to the Administration list where your new administration will be shown.

- If you need to verify or modify one or more of the copied test assessments, please refer to the section below on "Edit associated assessments."

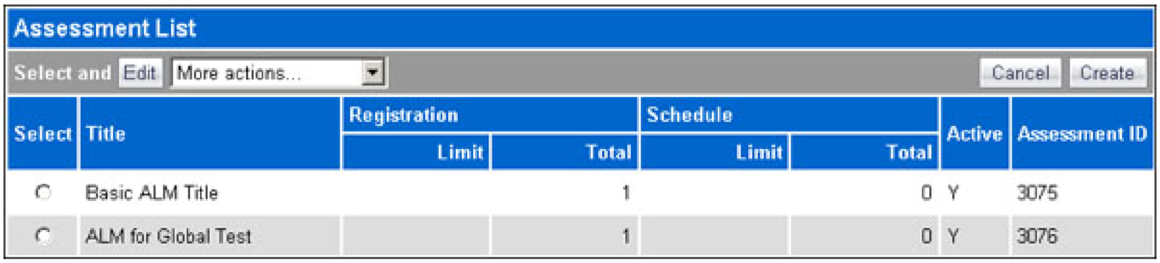
Edit associated assessments

To edit the assessments associated with a test administration window, select the radio button next to the administration name you wish to modify.

Click the **Edit Assessments** button, located above the administration list.



If you have already selected Titles to add to the administration session, those Titles will be listed for you.

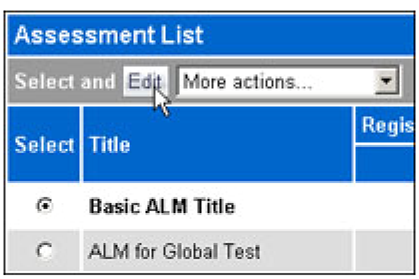


The Y in the active column means the tests are eligible for registration. Values displayed in the Total columns under Registration or Scheduled indicates the number of students who are currently registered or scheduled for that Title. If limits have been set up for scheduling or registration, the numbers will be filled in those fields as well.

Edit assessment details

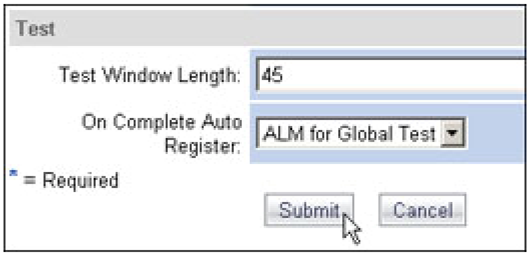
To view or edit the assessment setup details, select the radio button next to the assessment title.

Click the **Edit** button located above the title list.



The assessment ID and Title will be displayed at the top. Values displayed under Registration Total or Scheduled Total indicates the number of students who are currently registered or scheduled for that Title.

Make any changes to the other, editable data fields that you wish. Click the **Submit** button below the data fields to return to the list of assessments (partial view shown below).



- For detailed information about the assessment data fields, please refer to the section in the *Create a New Assessment* topic which describes the "Create Assessment Screen."

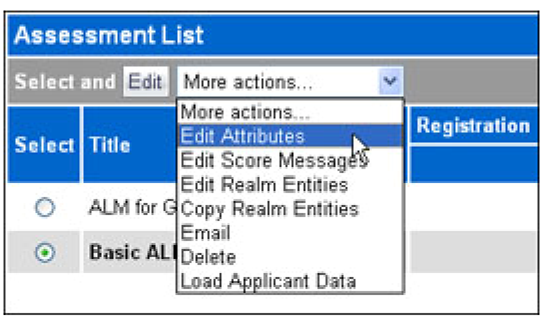
More actions... (drop-down box)

- Edit Attributes
- Edit Score Messages
- Edit Realm Entities
- Copy Realm Entities
- Email registered examinees
- Delete assessments
- Load Applicant Data

Edit Attributes

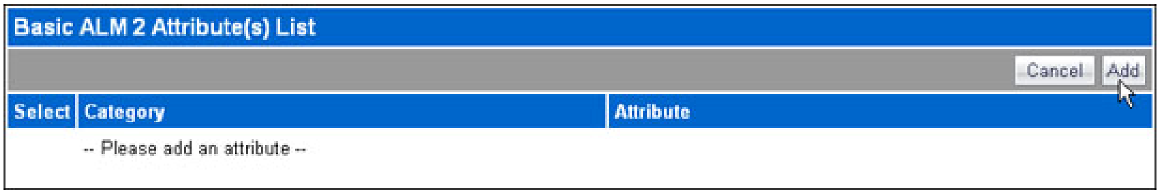
To edit the registration attributes associated with the assessment, select the radio button next to the assessment title.

Click the **More Actions...** drop-down box and select **Edit Attributes**.



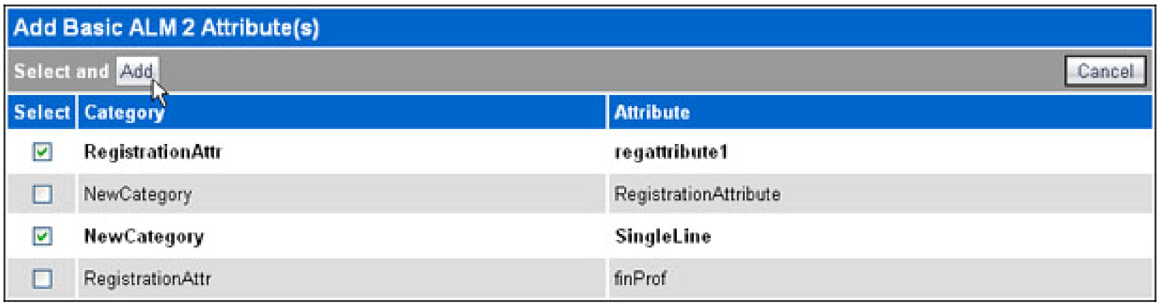
This will open the registration attribute list for the assessment you selected. If there are registration attributes already linked to your assessment, they will be listed for you.

If there aren't any currently linked to your assessment, or you wish to link more registration attributes to this assessment, click the **Add** button located on the far right of the Attribute List screen.

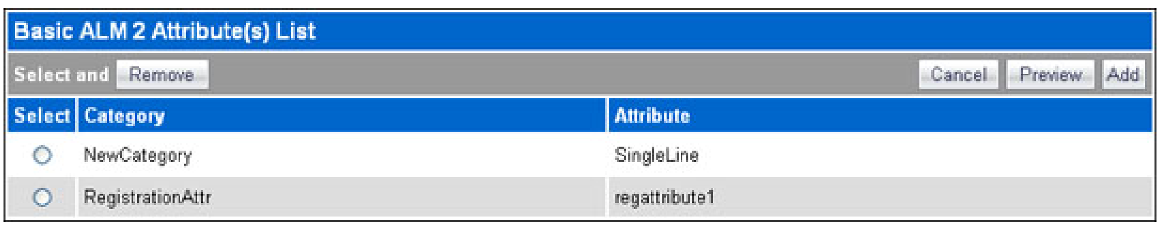


A list of all available registration attributes will be displayed for you.

Mark the checkbox next to the registration attributes you wish to link to the assessment and click the **Submit** button located above the list of attributes.



This will link the registration attributes to your assessment and they will appear on your list.



REMOVE REGISTRATION ATTRIBUTES

To remove one of the attributes from your list of attributes, select the radio button next to the item you wish to delete.

Click the **Remove** button located above the list of attributes.

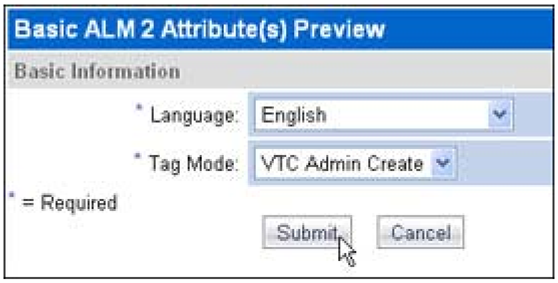
A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected item and return to the updated list, or click **Cancel** to return to the list of attributes without deleting.

PREVIEW REGISTRATION ATTRIBUTES

To preview your registration attributes, click the **Preview** button located on the far right side of the Attribute List screen.

Use the drop-down boxes to select the make your criteria selections for the attributes you wish to preview.



* *Indicates a required field.*

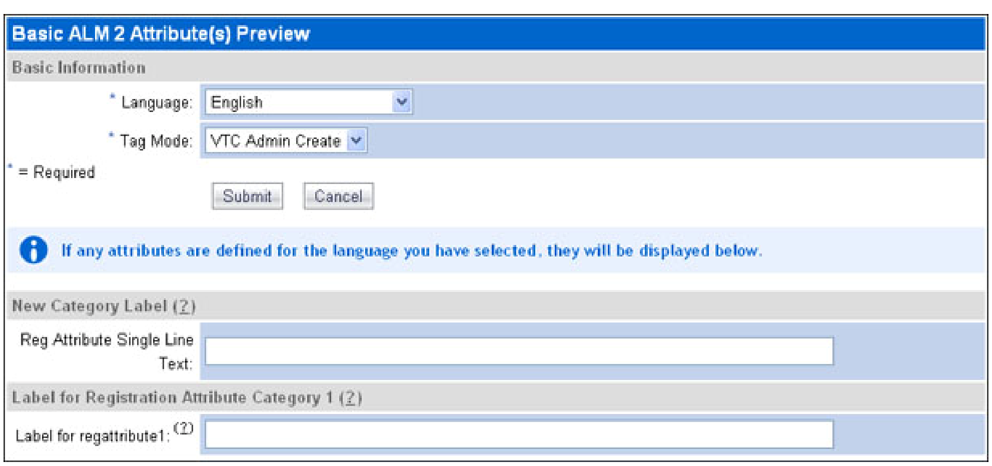
* **Language**: Select the language in which you want to view the selected attribute (Additional languages will only appear as an option for realms that have enabled multiple languages in *Realm Management*.)

* **Tag Mode**: Select the tag mode characteristic for previewing. (For example, attributes that are accessible by end users during the registration process, an end user who may be editing their record, a staff person in the VTC Management during create or edit mode, or attributes in display mode only.)

Click **Submit** after you have made your selections.

Attributes will be displayed based on the criteria you selected. You will be allowed to interact with the attribute as though you were an end-user.

- In the example shown below, help text was included during attribute setup for the attribute categories and for the second attribute. Mousing over the question mark indicators **(?)** will display the help text as a pop-up.



Fill in the information as requested. Any required information will be marked as required. If you set up field parameters requesting specific data types, those requirements must be met before you will be allowed to go on. (e.g., field length, character specifications, etc.)

Click **Submit** when you are ready to go on so you can preview attribute setup.

When you are finished previewing the attribute, you may use the drop-down boxes to select different attributes or modes to preview, or click **Cancel** to return to the Attribute List.

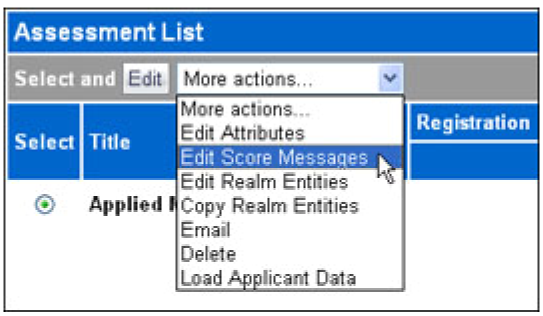
Edit Score Messages (not applicable to all VTC clients)

If score messages have not already been set up for your realm, you will not need to complete this step. They are only in use by specific applications and realms throughout the Virtual Test Center.

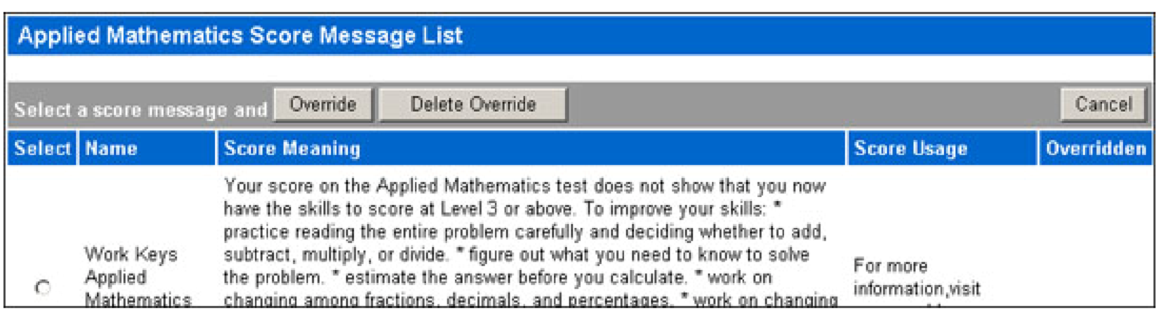
Score messages provide additional information to the examinee about the usage and meaning of the assessment scores and are included on the Instant Score Report. You can customize the score messages used by your realm. Any changes you make will override the standard message. You may not delete or add scoring messages.

To view or edit the score messages select the radio button next to the assessment title.

Click the **More actions...** drop-down box and select **Edit Score Messages**.

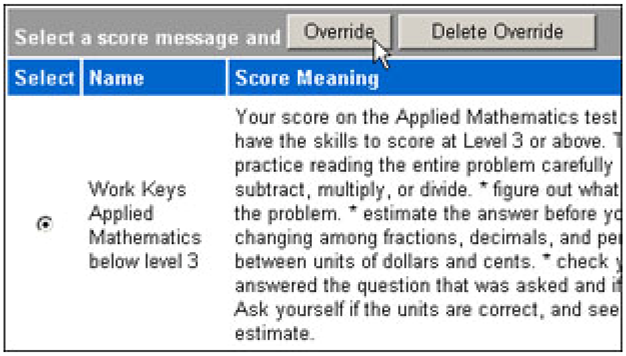


If score messages are in use by your realm, they will be displayed. (Partial view shown in the example below.)

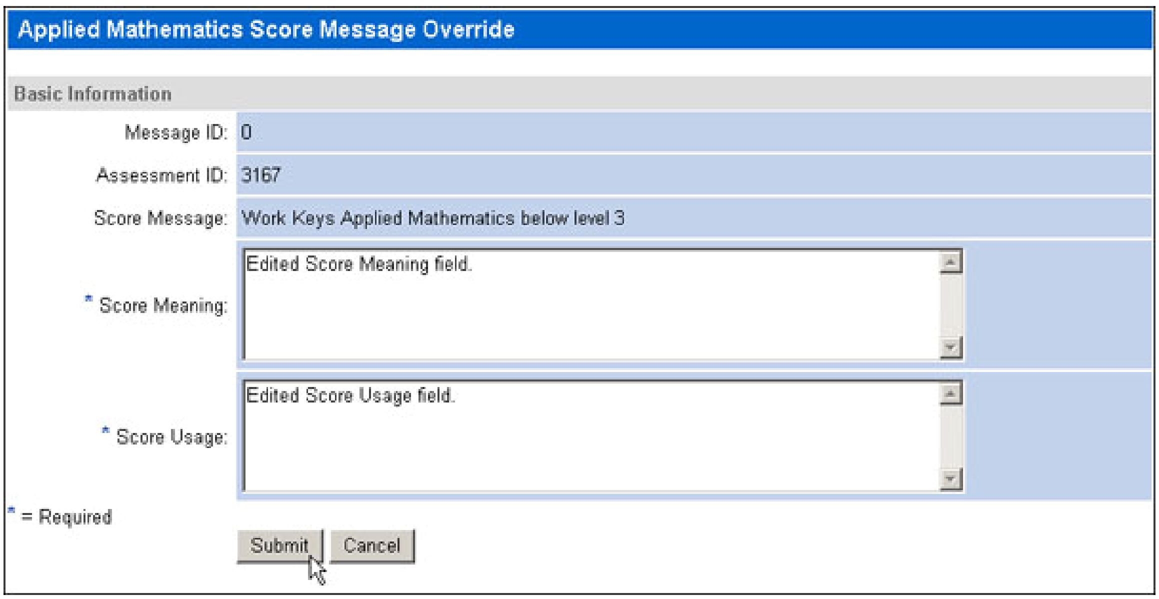


OVERRIDE DEFAULT TEXT

If you wish to make changes to one of the score messages, select the radio button next to the message you want to edit and click **Override**.



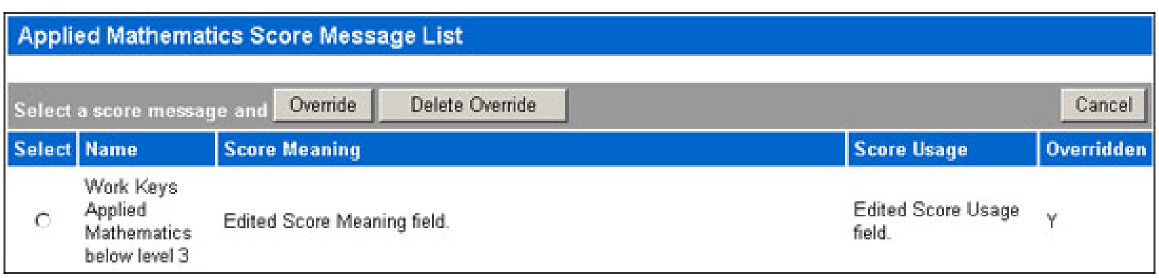
You may edit the Score Meaning and Score Usage fields only. These fields may not be left blank.



Score Meaning: The description of the score received.

Score Usage: Information about how the scores are used.

Click **Submit** when you are finished making changes to return to the updated list of score messages.



REVERT TO DEFAULT TEXT

Any messages that have been modified will be marked with a Y in the "Override" column.

To undo a modified message and revert to the default text, select the radio button next to the message you want to undo and click **Delete Override**.

A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to undo the changes and return to the displayed list of messages.

When you are finished editing/reviewing score messages, click **Cancel** to return to the list of assessments.

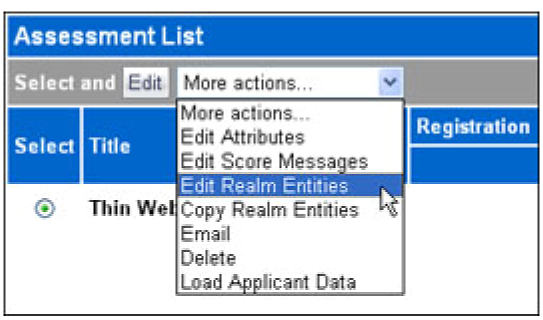
Edit Realm Entities

You must first use **My Realm** to link a list of eligible entities to your realm before you can use this feature. Then, you may associate the assessments to the entities that will be using them.

- For details on how to add entities to your realm, please refer to the "Entities tab" in the *My Realm* topic.

To edit the entities linked to this assessment, select the radio button next to the assessment title.

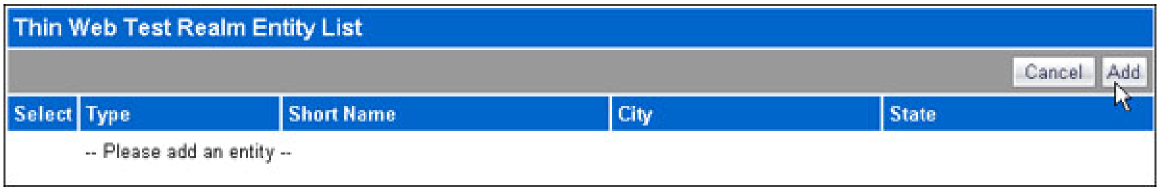
Click the **More actions...** drop-down box and select **Edit Realm Entities**.



ADD ENTITIES

Click the **Add** button located on the far right side of the screen.

- Please note that the Search feature (not pictured here) will only locate entities that have already been added to your list.

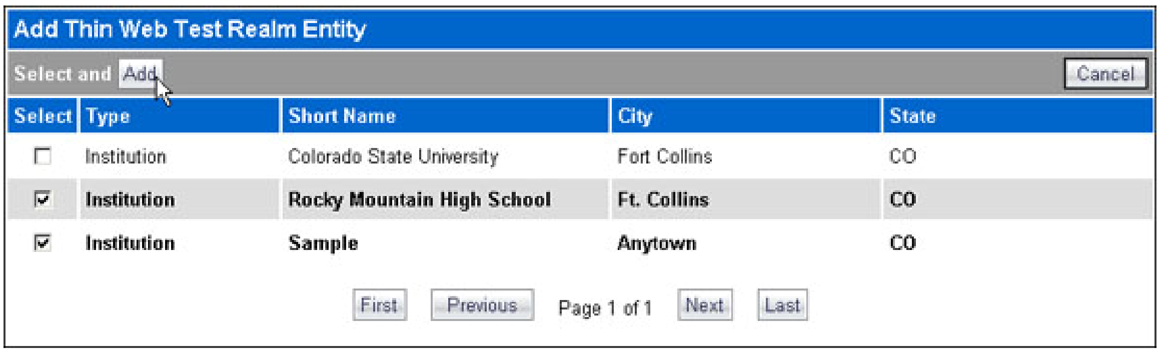


The entities that have been linked to your realm will be displayed.

- If none are listed, or the entity you are looking for is not on the list, you will need to have it linked to your realm using the "Entities tab" located in the *My Realm* main menu option.

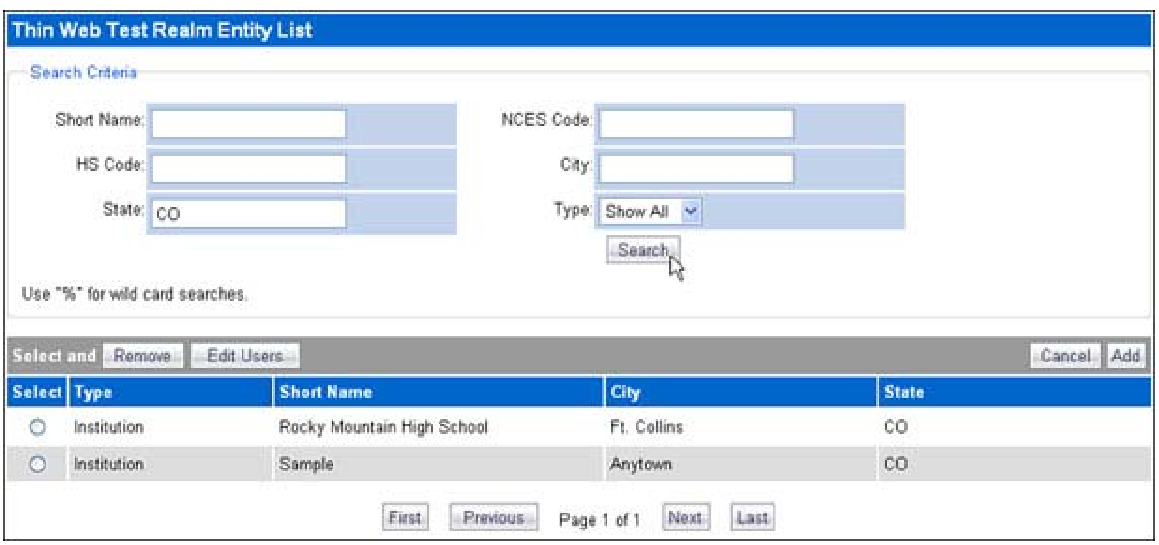
Mark the checkbox next to the institutions you wish to link to the assessments as shown below.

Click the **Add** button located above the list of entities.



The entities you selected will be added to your list.

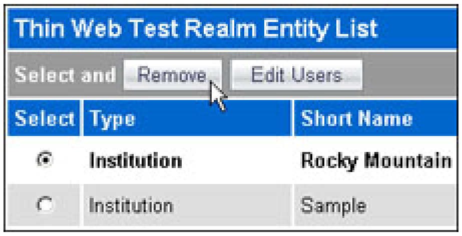
Now you may use the available Search criteria (pictured below) to find Entities that have been added to your list.



Remove Entities

To remove an associated entity from the assessment, select the radio button next to the institution name.

Click the **Remove** button located above the entity list.



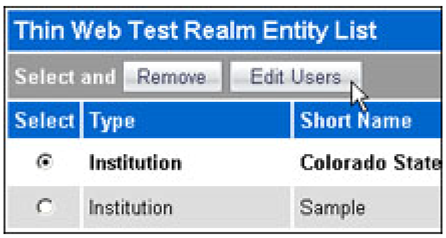
A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected item and return to the updated list, or click **Cancel** to return to the list of entities without deleting.

ENTITY USER LISTS

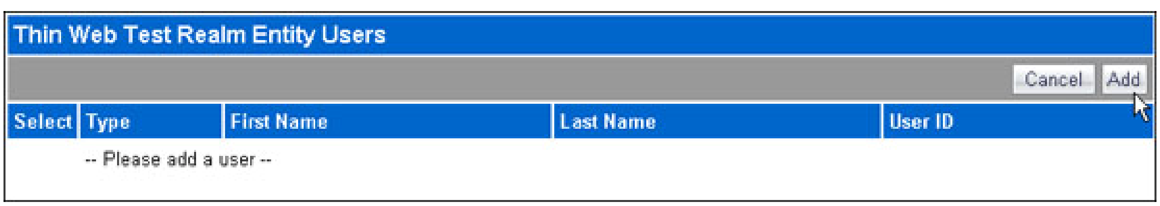
To edit the list of users associated with the entity, select the radio button next to the entity's name.

Click the **Edit Users** button located above the entity list.



Add entity users

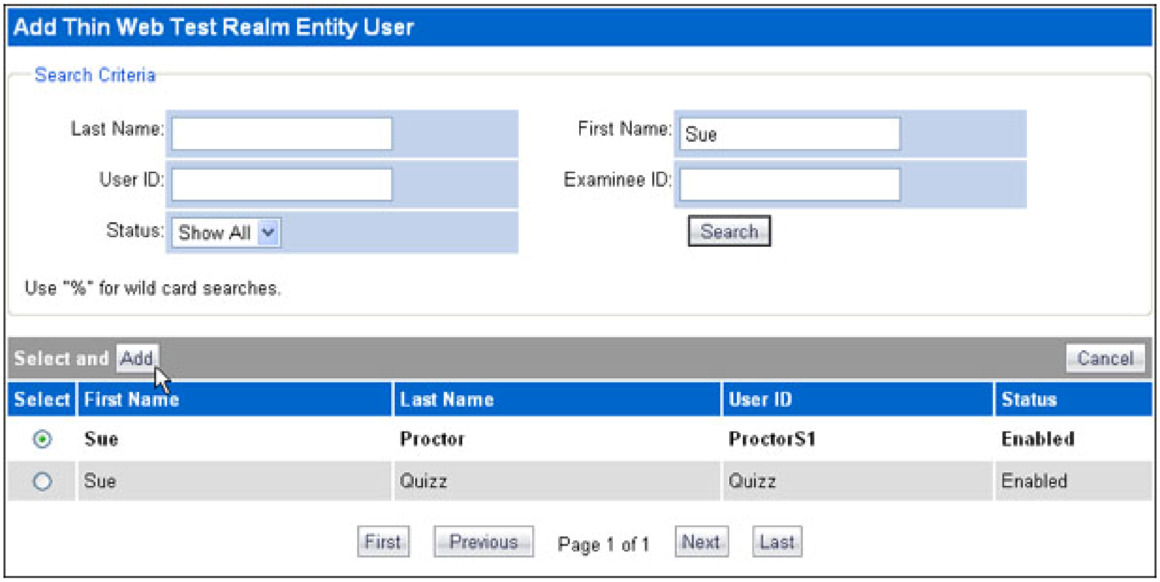
The list of current users from your realm will be displayed. If you need to add users, click the **Add** button on the far right side of the screen.



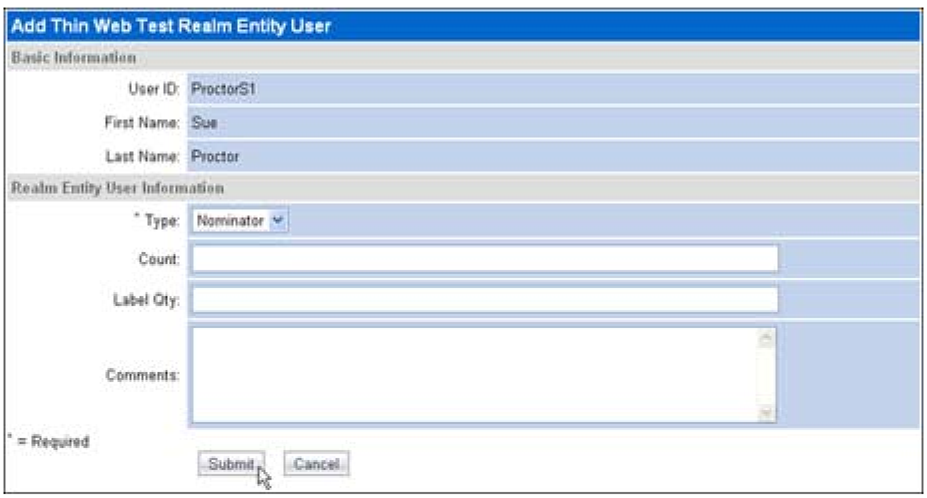
First, you must perform a user search for the users at your realm.

Enter search criteria to narrow your search, or leave the criteria fields blank to show a list of all available users.

When the user name you want is located, click the radio button next to the user name. Click the **Add** button located above the list of search results.



The Basic Information will be displayed, and is not editable. Enter the Realm Entity User Information in the data entry fields.



** Indicates a required field.*

* **Type**: Use the drop-down box to select the user type.

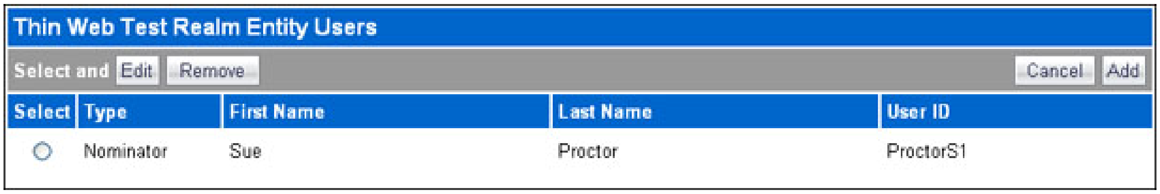
Count: The number of applicants a Nominator can nominate from their Institution.

Label Qty: Label Qty is used by RPS Admin to indicate how many address labels should be printed for this person.

Comments: Enter any comments you may have about this user in the text entry field.

Click **Submit** when you are finished.

Your user will be displayed on the list of users.

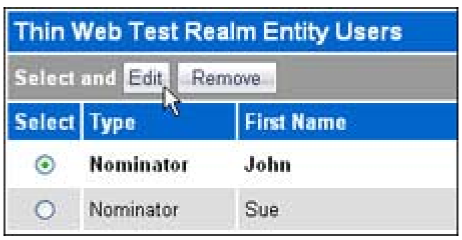


You may continue to add entity users, or click **Cancel** to return to the list of entities.

Edit entity users

To edit the user data from the list of users associated with the entity, select the radio button next to the user name.

Click the **Edit** button located above the user list.



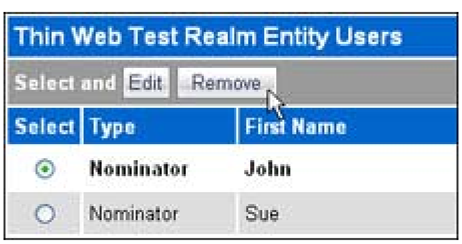
This will open the data page for the user as described above in the section "Add Entity Users."

Make any modifications you wish. Then click the **Submit** button to accept your changes.

Remove entity users

To remove a user associated with an entity, select the radio button next to the user name.

Click the **Remove** button located above the user list.



A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected item and return to the updated list, or click **Cancel** to return to the list of users without deleting.

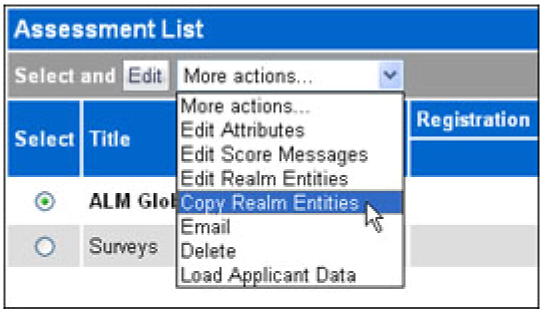
Copy Realm Entities

Once you have added a list of entities to one assessment, you may copy that list for use in other assessments. Please note that copying a list will only add to your current list. It does not supersede any existing entities you may already have added.

- For details on how to add entities to your assessment, please refer to the section above that describes how to "Edit realm entities."

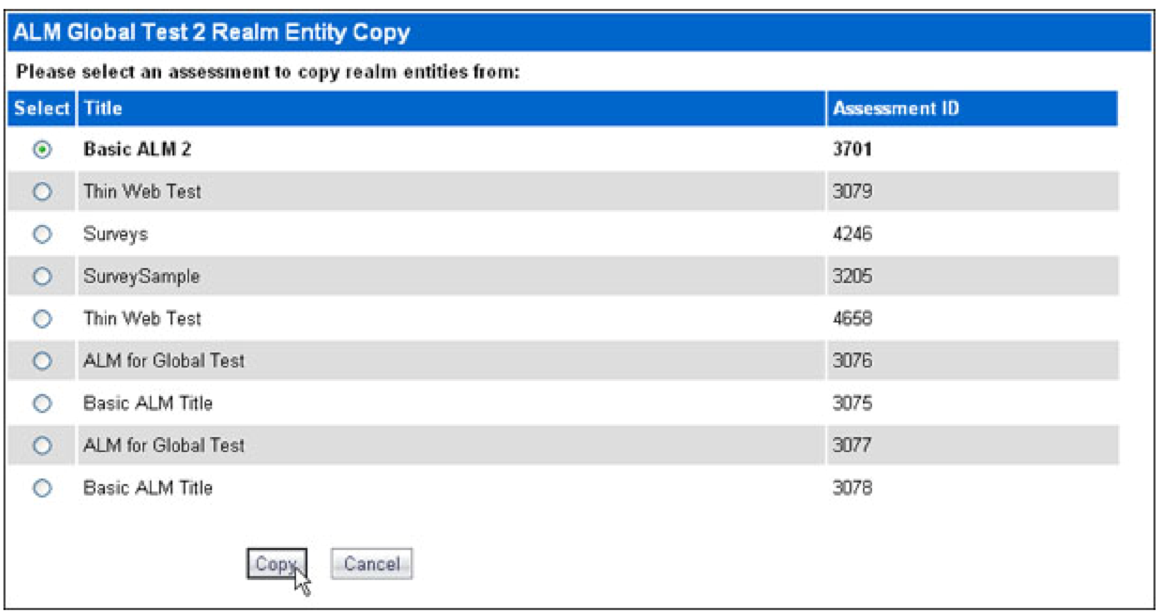
To copy the entities list from another assessment, select the radio button next to the assessment title.

Click the **More actions...** drop-down box and select **Copy Realm Entities**.



Your realm's assessment titles will be displayed.

Mark the radio button next to the assessment containing the list of entities you wish to copy. Click the **Copy** button located beneath the assessment list.



The list of entities will be added to the selected assessment. Existing entities you may already have will not be overwritten.

- **NOTE**: If the list you attempt to copy contains entities that are already listed in your current assessment, you will receive a message indicating "Values are not unique." Either select another assessment's list to copy, or use the drop-down box to Edit realm entities, delete the duplicates, and try the copy process again.

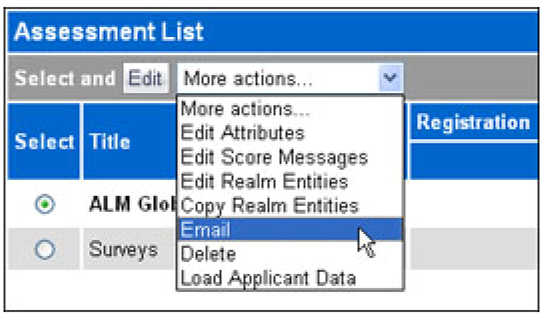
You will return to the assessment page where you can continue making modifications to your assessment.

If you wish to verify the list of entities, or make modifications to the newly copied list, review the section above on how to "Edit realm entities."

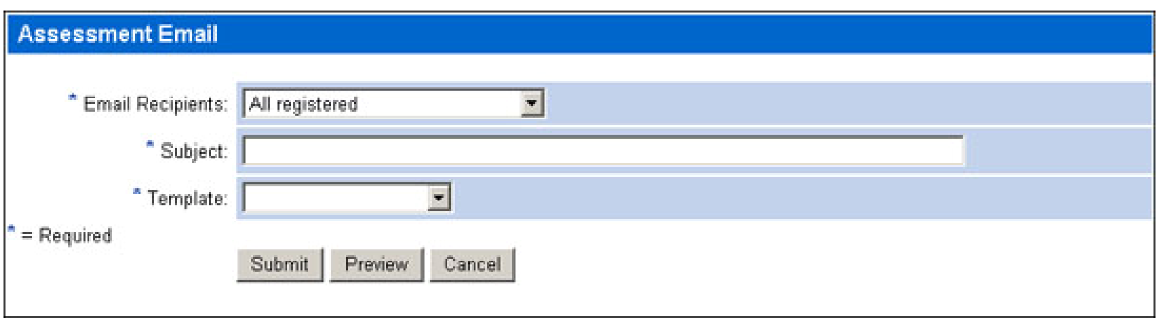
Email registered examinees

To email examinees that have registered for a selected title, select the radio button next to the assessment title.

Click the **More actions...** drop-down box and select **Email.**



This will open the Assessment Email screen as shown below.



**Indicates a required field.*

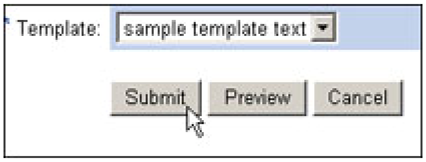
***Email Recipients**: Use the drop-down box to select the email recipients among those who are registered for the assessment.

***Subject**: Enter the subject line of the email.

***Template**: Use the drop-down box to select the email template.

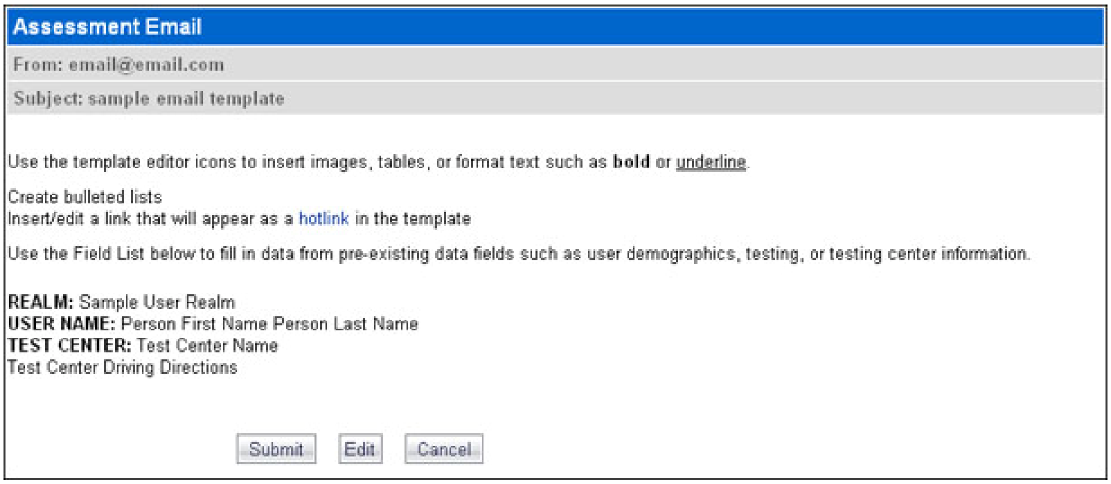
- Please note that all templates are created in *Realm Management* using the Templates tab.

If you are ready to send the email, click the **Submit** button. *-OR-* If you are not sure what template to use and you want to see the content of your email, click the **Preview** button instead of Submit.



-*OR*- If you are not sure what template to use and you want to see the content of your email, click the **Preview** button instead of Submit.

Your email contents will be displayed on-screen. (Formatting may vary slightly from the actual email, but the contents remain the same.)



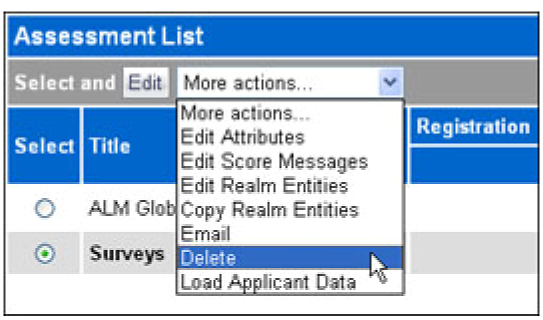
If you are satisfied with the Preview, you may click **Submit** in the preview window to send the email.

If you are not satisfied, you may click **Edit** in the preview window to select another template or click Cancel to return to the list of assessments.

Delete assessments

To delete an associated assessment from your list of assessments, select the radio button next to the assessment title.

Click the **More actions...** drop-down box and select **Delete**.



A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected item and return to the updated list, or click **Cancel** to return to the list of assessments without deleting.

- **NOTE**: If a user is currently registered for the assessment, you will not be able to remove it from the administration.

Load Applicant Data

To load a prepared .csv survey data file, which will populate an applicant's survey answers, select the radio button next to the assessment title. (This feature is only applicable to Survey titles.)

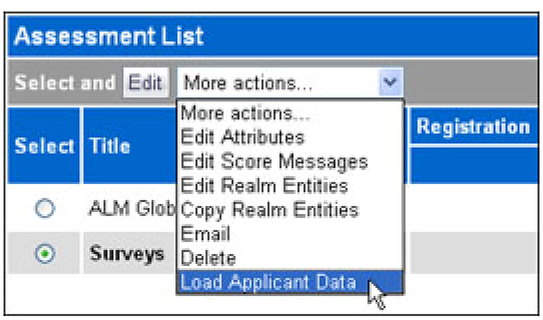
- **NOTE**: The survey title must first be created/loaded using Title Management (see *Create a New Title*), be created and linked as a new survey assessment with administration dates using Assessment Management (see *Create a New Assessment*), and examinees must be registered for the appropriate survey title under User Management (see the Registration tab under *Create a New User*) for this feature to be linked correctly to the correct file.

The Applicant Data file must contain the following information:

RegistrationId	ApplicantType	SurveyQuestionName1	SurveyQuestionName2 (et. al.)

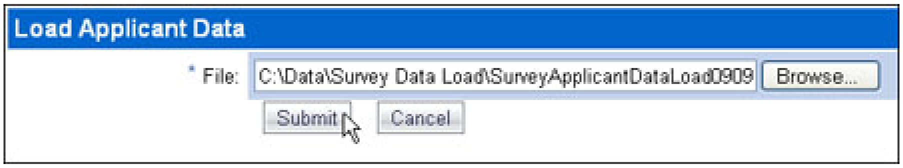
Once a user has been registered for the existing Survey, find the RegistrationID under *User Management*, Registration tab.	Examinee	If (ESY), entire length of actual essay text.
		If (MC), QuestionChoiceName.
		If (MR), QuestionChoiceName.
			If (SEL), QuestionChoiceName.
			(or RESPONSE$#$RESPONSE_MEANING if SurveyQuestionChoiceQuery is applicable.)
			If (TXT), Text length actual text.
			If (YN), Y or N.

Click the **More actions...** drop-down box and select **Load Applicant Data**.



Click **Browse** to find the .csv data file you wish to load.

Click **Submit**.



You will return to the assessment list. When examinees go to take the survey, they will find their answers pre-populated. They can either change them or confirm them.

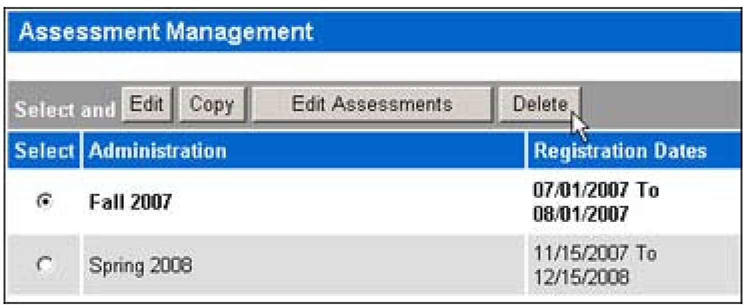
Delete a test administration and associated assessments

Click **Assessment Management** from the main menu. Any existing test administrations will be listed for you.

To delete an existing test administration window with all associated assessments, you must first delete all assessments that have been linked to the administration as described in the previous section.

Once the test administration is "empty" of related assessments, select the radio button next to the test administration you wish to delete.

Click the **Delete** button located above the administration list.



A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected item and return to the updated list, or click **Cancel** to return to the administration list without deleting.

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Create a New Assessment

This section describes how to create a new assessment, setup administration dates and add titles to the assessment. It also describes in detail the fields and functionality of each tab.

Create a new assessment

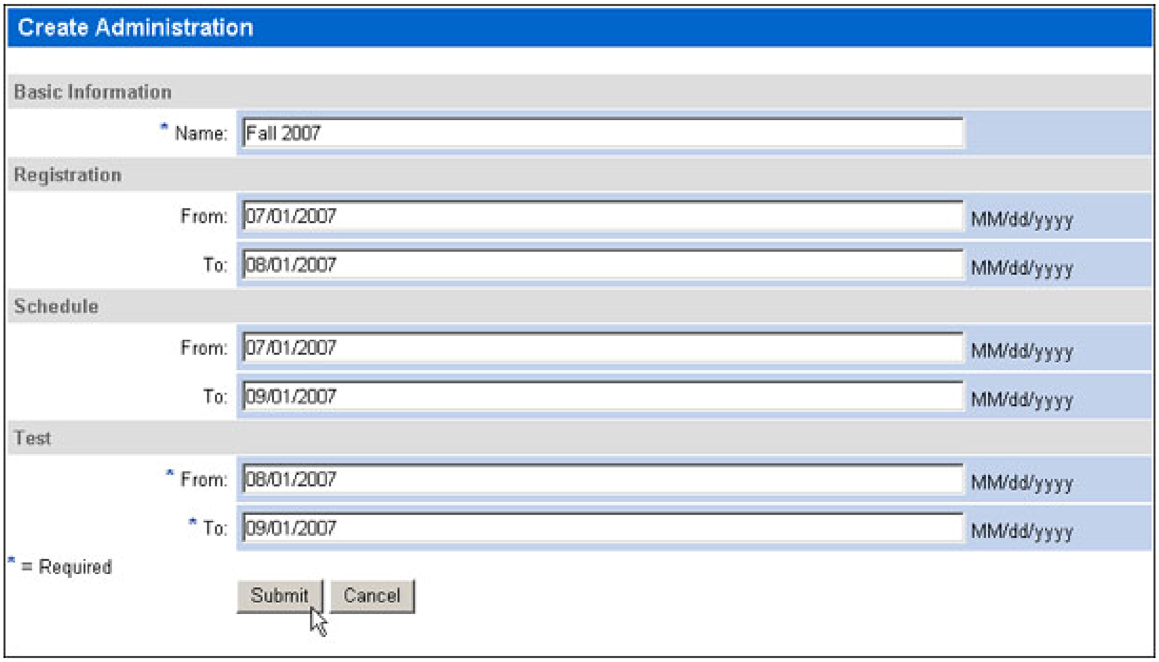
To create an assessment, you must first set up the test administration dates, or a "window", during which the test Title or collection of Titles will be administered. After the administration is set up, then you may add the assessments that are to be delivered to the examinees.

Set up test administration dates

Click **Assessment Management** from the main menu.

Click the **Create** button located on the far right of the main Assessment Management page.

First, you will be asked to set the test administration registration, scheduling, and testing dates. These dates designate the "window of events" for the assessment you are creating.



**Indicates a required field.*

***Name**: Enter a name for the test administration parameters. Choose a name that describes the assessment type or dates to help identify it later. e.g., "Fall YYYY."

Registration: Enter the date range during which students can register or be registered for an assessment. If there is no deadline or registration window, leave the date fields blank.

Schedule: Enter the date range during which students should complete the scheduling process. If examinees are not required to schedule their test session by a certain date, leave the date fields blank.

***Test**: Enter the date range when the assessment will be administered.

> **NOTE**: This is a required field for the purposes of the VTC application. However, if a fixed date range is not required by your realm, enter today's date in the "From" field, and a "To" date up to ten years in the future.

When you are finished entering the test administration dates, click the **Submit** button to return to the list where your new administration will be shown on the administration list.


Assessment Management

Select and Edit | Copy | Edit Assessments | Delete | Create

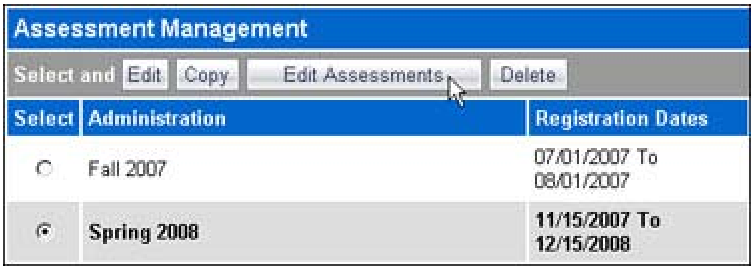
Select	Administration	Registration Dates	Schedule Dates	Test Dates	Administration ID
○	Fall 2007	07/01/2007 To 08/01/2007	07/01/2007 To 09/01/2007	08/01/2007 To 09/01/2007	1749
○	Spring 2008	11/15/2007 To 12/15/2008	11/15/2007 To 01/15/2008	12/15/2007 To 01/15/2008	1750

Your next step, "Add assessments," is to add the titles that will be delivered to the examinees.

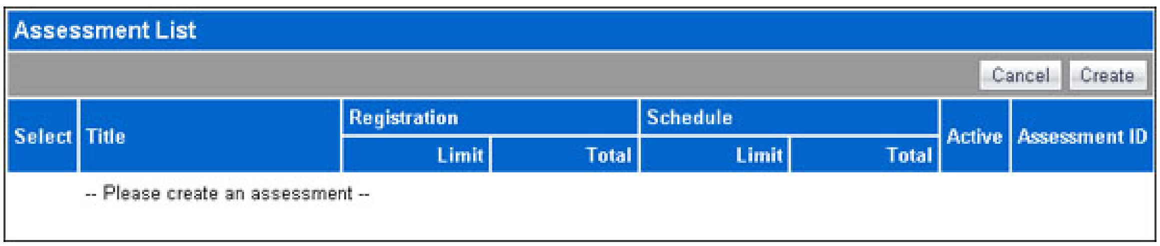
Add assessments

Now that your administration dates are set, you will need to select the test Title(s) to be administered when the assessment is launched.

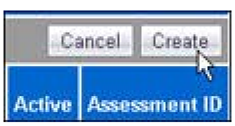
Select the radio button next to the test administration parameters you wish to use, and then click **Edit Assessments**.



This will bring you to the Assessment List screen.

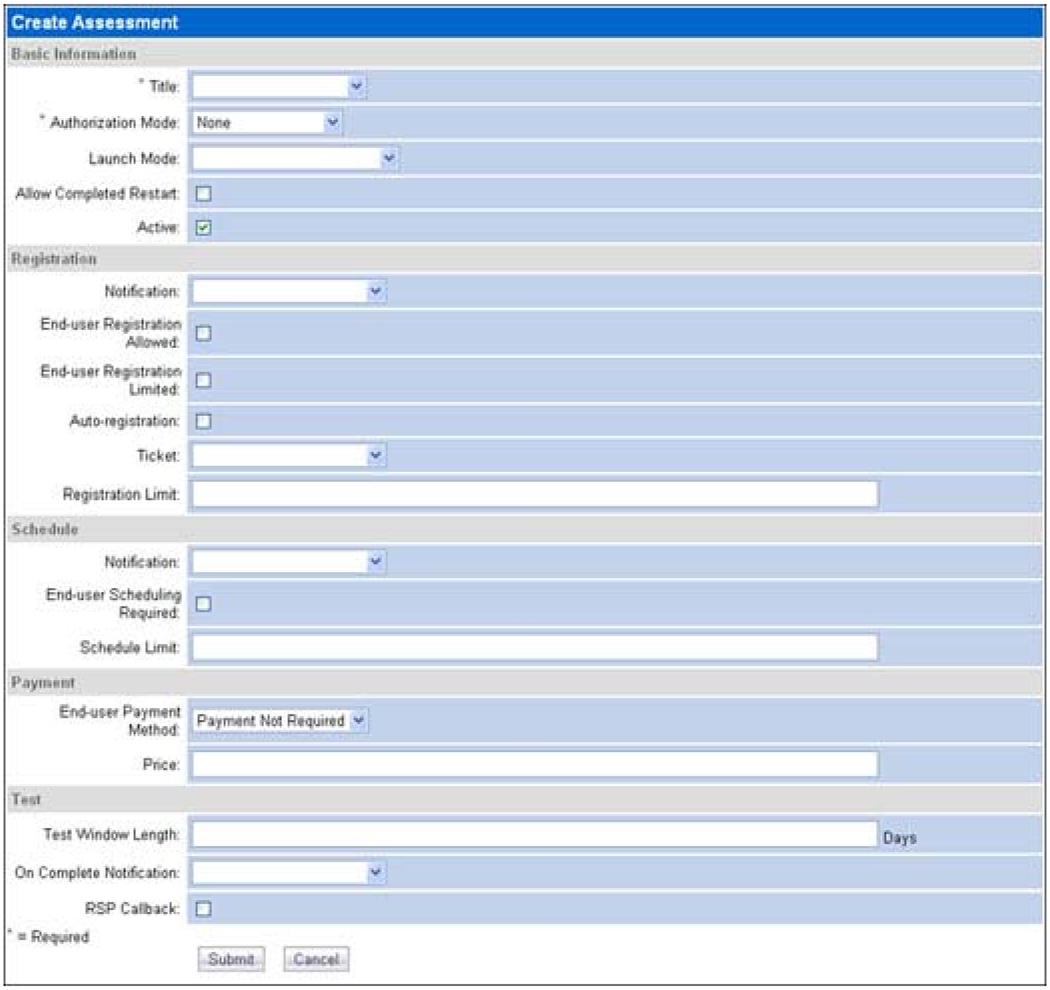


To create a new assessment and add it to your list, click the **Create** button located on the far right of the Assessment List screen.



<u>Create Assessment screen</u>

The Create Assessment screen will display as shown below.



BASIC INFORMATION

**Indicates a required field.*

***Title**: Select the name of the associated title from the drop-down list.

> **NOTE**: You must have at least one Title available for selection before you can set up an assessment. Titles associated with your realm should already be loaded or set up in *Title Management* or you cannot create Assessments.

***Authorization Mode**: Use the drop-down box to indicate whether or not a proctor must signal approval before the candidate can launch the exam.

Launch Mode: Use the drop-down box to select whether you want to launch the test or survey in the same window (Inline), or in a separate window (New Window), with or without allowing access to the scroll bar.

The 3 options are as follows:

- **Inline** — Most surveys are to be delivered inline.
- **New Window - no scroll bar** — Most tests are delivered without a scroll bar. Any required screen-scrolling is managed by the test delivery engine itself (e.g., WorkKeys.)

- **New window - scroll bar** — Choose this option for delivery of Personal Skills Assessments.

Allow Completed Restart: Use the checkbox to indicate whether you wish to allow users to review their responses after they have completed the assessment.

Active: Use the checkbox to indicate whether the assessment is active and available for selection. The default status is active. No one can register or be registered for an inactive assessment.

REGISTRATION

Notification: Use the drop-down box to select the email template to be sent to users when they are successfully registered for the assessment.

- For detailed instructions about how to create notification templates, please refer to the "Templates tab" under in the *Create a New Realm* topic.

End-user Registration Allowed: Use the checkbox to indicate whether or not examinees are allowed to register themselves for this assessment.

End-user Registration Limited: Use the checkbox to indicate whether or not examinees are allowed to register for this assessment more than once.

Auto-registration: Use the checkbox to indicate whether or not examinees should automatically be registered for the assessment at time the user account is created.

NOTE: You must also activate the Auto-registration button in Realm Management for the Auto Registration process to work. Clicking Auto-registration at the realm level activates auto-registration for the realm; Auto-registration in Assessment Management activates auto-registration for the individual assessments.

Ticket: Use the drop-down box to select the ticket template which will be linked to the assessment. If a template has been set up, any information that a candidate should have will be generated upon request. The registering staff person can then print the information and distribute it to the examinee or send it via email. (Tickets are generated under *User Management*.)

- Please note that all templates are created in *Realm Management* using the Templates tab.

Registration Limit: Set the number of examinees that may register for the assessment. Once the limit has been reached, examinees can no longer be registered.

SCHEDULE

Notification: Use the drop-down box to select the email template to be sent to users when they are scheduled to take the assessment.

- Please note that all templates are created in *Realm Management* using the Templates tab.

End-user Scheduling Required: Use the checkbox to indicate whether or not scheduling a time to take the assessment is required.

Schedule Limit: Set the number of examinees that may be scheduled for the assessment. Once the limit has been reached, examinees can no longer be scheduled.

PAYMENT

End-user Payment Required: Use the drop-down to indicate whether or not payment is required before taking the assessment, or whether payment is only required in the event of a no-show.

Price: If payment is required, enter the cost for taking the assessment. (Allowable characters 0-9, decimal point optional.)

NOTE: Users must also be assigned the Finance Manager role to set payment price.

TEST

Test Window Length (in days): Enter the number of days that a registered user has to complete the test.

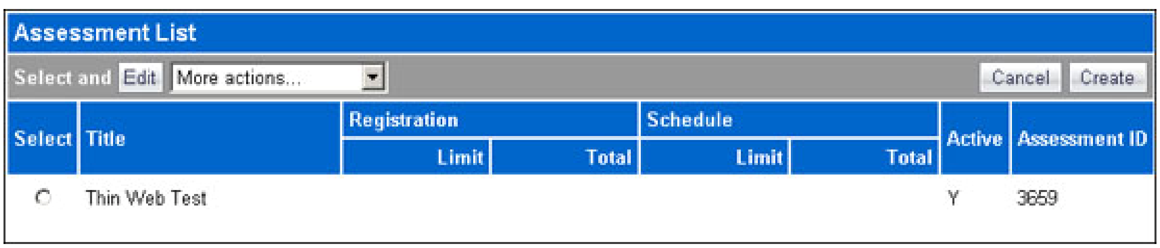
NOTE: The test window length field in each individual assessment will override the test window value that is defined by the test administration dates.

On Complete Notification: Use the drop-down box to select an email template to be sent to the user when they have completed the assessment. (To be used with ThinWeb, ALM ThinWeb, and Surveys only.)

RSP Callback: Use the checkbox to indicate whether the system should keep the RSP (Registration, Schedule, and Payment) session active. If enabled, RSP will be re-displayed without log on screen after a launched assessment session is over.

When you are finished entering data, click the **Submit** button to return to the assessment list where your new test Title will be shown.

If you have set up Registration or Schedule Limits, those values will be displayed in the appropriate columns.



Repeat the above steps if you wish to add additional test titles to the assessment.

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Reports Portal

User Role Access: Ultra User, Portal Manager

If a reporting portal is required, ACT IT staff will set up the external URL that site administrators will use to launch the reports. Client access to the reports portal is assigned by ACT, based on the user's role and site type. Not all sites will need to access the Reports Portal.

If a Portal URL has been set up for your realm in *Realm Management*, click **Reports Portal** from the main menu to launch the reports site. This will launch a site address outside of the VTC application.

Once you have launched the Reports Portal window you have left the Virtual Test Center Console application.

Close the Reports Portal window to return to the VTC.

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Program Management

User Role Access: Ultra User only

Click **Program Management** from the main menu to display a list of existing programs. From this page you may create a new program or edit an existing program's name or portal URL. *Program Management is for ACT Administrative use only.*

- Edit a program
- Create a program
  - o Program tab
  - o SchedulingTypes tab

Edit a program

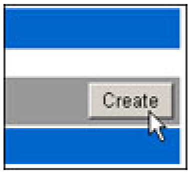
To edit an existing program, select the radio button next to the program you wish to modify. Click the **Edit** button located above the list of programs.

There are two tabs of information associated with each program. They are labeled "Program," and "Scheduling Types." The tabs available to you are based on your assigned user role. Click the tab titles to view or edit the stored data.

- For detailed information about the data fields and processes in each tab, please refer to the section below on how to "Create a program."

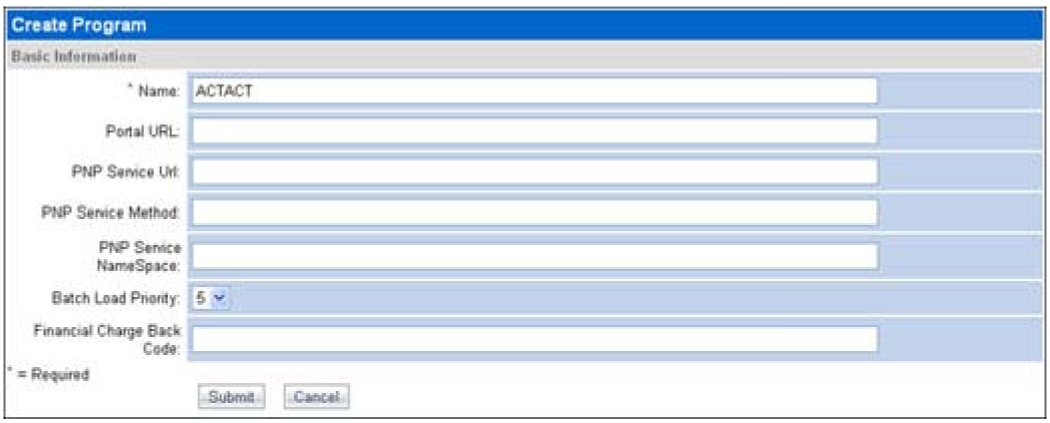
Create a program

To create a new program, click the **Create** button located above the list of programs.



Program tab

Enter the program data in the text entry fields.



Indicates a required field.

Name: The name of the program.

Portal URL: Enter the complete Portal URL including http:// (e.g., http://www.act.org). This is an optional field. Entering the Portal URL will launch an external reports site when a site administrator clicks the "Reports Portal" button on the main menu.

PNP Service URL, Service Method, and NameSpace: If a realm within the program is to be associated with paper and pencil (PNP) site codes, these three fields define the web service that will be used for PNP Site Management.

Batch Load Priority: Set the default priority level for processing user records for your program. Numbers range from 1-9, with 9 being the lowest priority in the queue. The default is typically 5 for "normal" processing time. If files come to the queue at the same priority they will be handled in the order they are received.

NOTE: There will be an opportunity for users with access to "escalate" a batch load for higher priority processing should the need arise. However, high priority batch settings should be used sparingly as it is not possible to rush all files to the top of the queue at the same time.

Financial Charge Back Code: Project code used by the ACT Finance department to collect usage data.

Click **Submit** when you are finished entering data.

SchedulingTypes tab

This will open the SchedulingTypes tab. (If you are editing a Program, any existing Scheduling Types that have already been set up will be displayed.)

Once Scheduling Types have been set up for your Program, the Realms within your program can further customize the settings using *Realm Management*. Otherwise, all Realms will automatically default to the Program's settings.

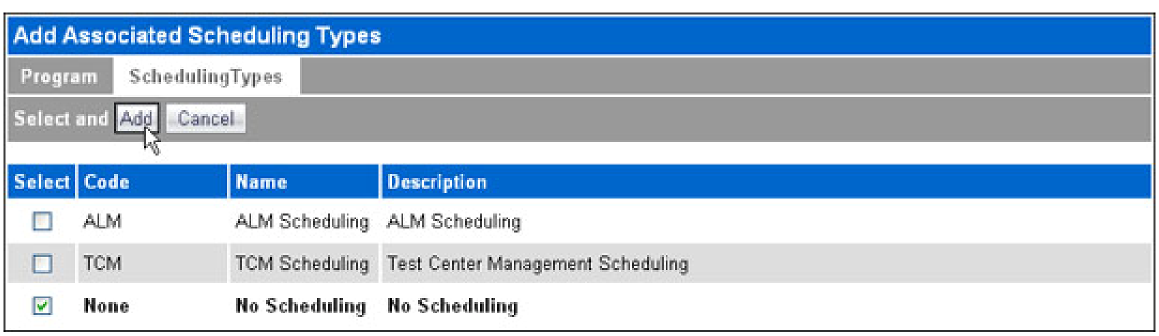
- If Scheduling Types have not been set up for your System, you will not be able to use this feature for the Realms or Programs that are linked underneath.

ADD AVAILABLE SCHEDULING TYPES

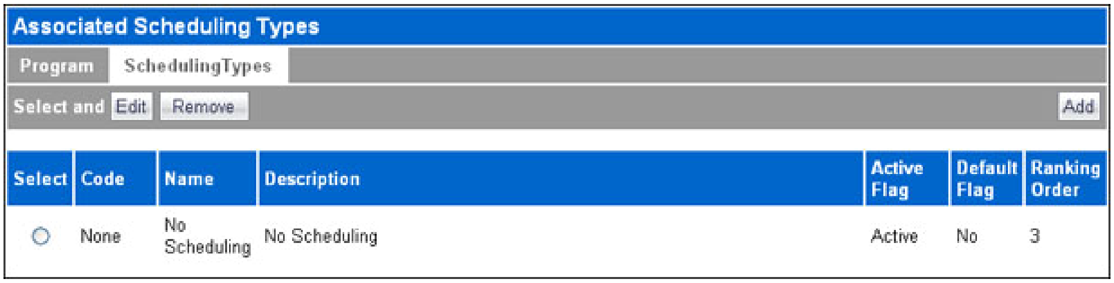
To select available Scheduling Types for use in the Realms at your Program, click the **Add** button located in the upper right corner.

Mark the checkbox to indicate which Scheduling Types are in operation at your program. The types you choose will determine the default settings and selections set up for the Realms associated with your Program.

Click the **Add** button when you are finished.



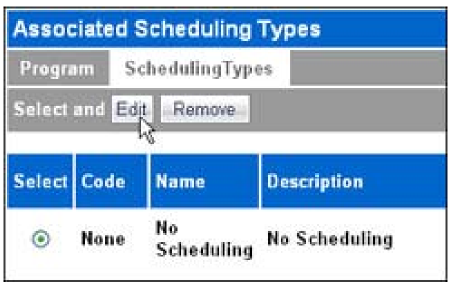
You will return to the Associated Scheduling Types screen where the scheduling types will be listed.



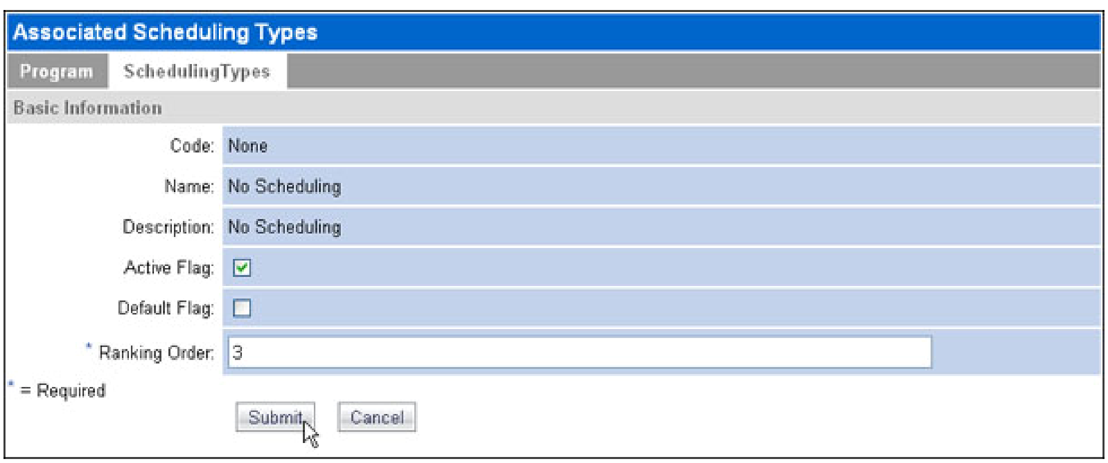
EDIT SCHEDULE TYPE

The current Active Flag, Default Flag, and Ranking Order are indicated in the columns on the Schedule Types tab as shown above.

To change these settings, click the radio button to select that Scheduling Type. Click the **Edit** button located above the list of types.



Use the checkboxes to set the Active and Default flags, and set the numerical value for the Ranking Order by typing a number in the field.



Active Flag: This field is not yet functional at the Program level and must be set by the System.

Default Flag: This field is not yet functional at this time.

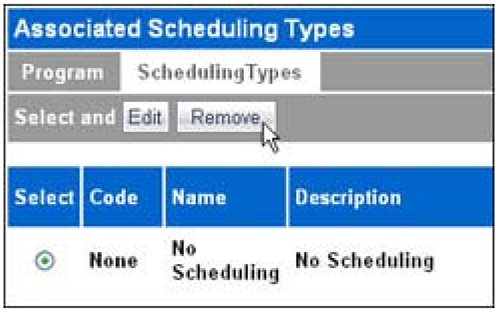
Ranking Order: The order that your schedule types will be displayed on-screen.

Click **Submit** when you are finished.

You will return to the Associated Scheduling Types screen.

Remove a Schedule Type

To remove a type from use in your Program, click the radio button to select the Scheduling Type. Click the **Remove** button.



The ScheduleType will be removed from the list.

When you are finished creating your program, click **Program Management** from the side menu. Your new program name will be shown on the updated program list.

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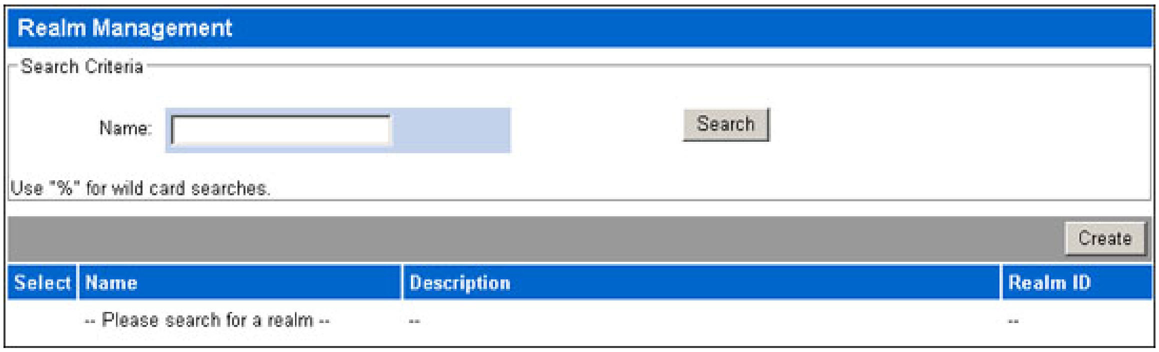
Realm Management

User Role Access: Ultra User only

- *Realm Management is for ACT Administrative use only. However, the Realm tabs described here under Edit a realm and Create a New Realm are also accessible by clicking **My Realm**.*

Click **Realm Management** from the main menu to search for an existing realm to view, edit, copy or delete, or to create a new realm. Only users who have been assigned the "Ultra User" user role will have access to this menu item.



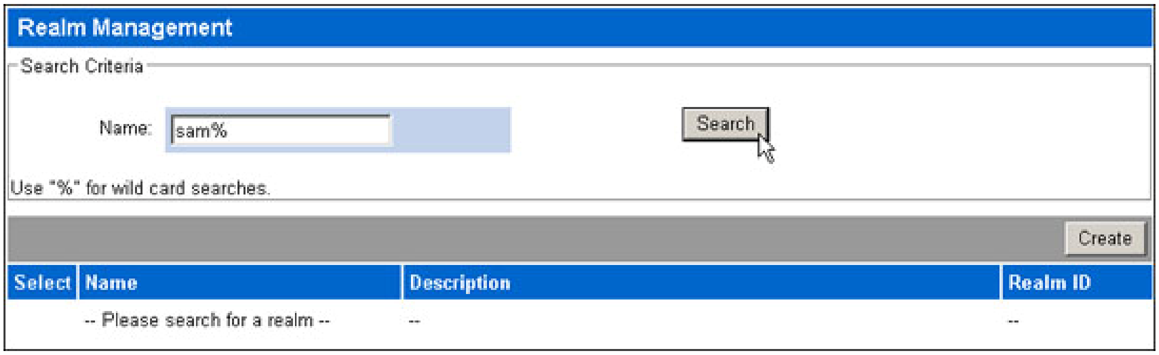
- Search for a realm
- Edit a realm
- Copy a realm
- Go to Realm
- Delete a realm

See also: Create a New Realm, My Realm

Search for a realm

If you do not know the exact name of the realm you are looking for, use the % sign as a wild card character to enter any part of the name of the realm in the search criteria fields. (Or, you may leave the search fields blank to display all the realms.)

Make your criteria selections and click the **Search** button.



The search results, including the realm's name, brief description, and realm ID, will be displayed beneath the search criteria, in the lower frame.

If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

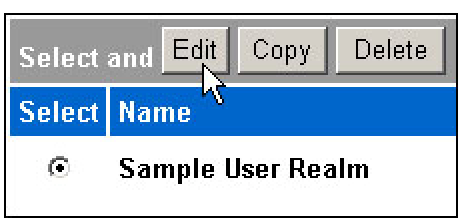
- If there are too many pages of results and you are having trouble locating the realm you want, narrow your search criteria and try again.

Edit a realm

To edit a realm, you must first perform a search to find the realm you wish to modify.

Once the realm is displayed in the search results, select the radio button next to the realm's name.

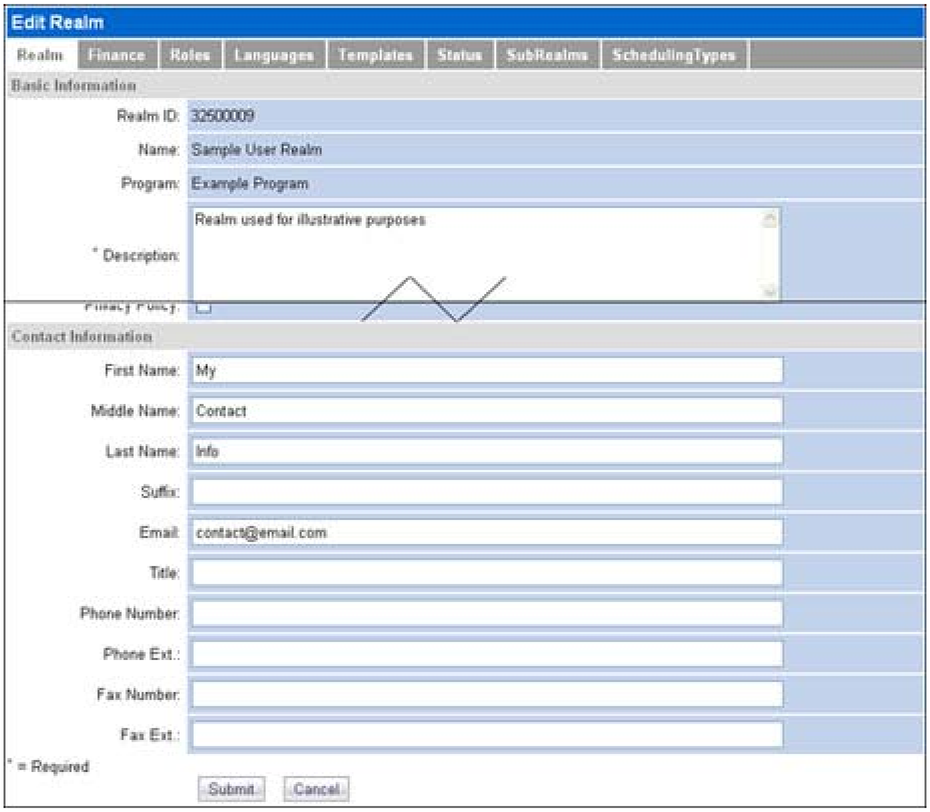
Click the **Edit** button, located above the list of realms.



There are several tabs of information associated with each realm in the Realm Manager. They are labeled "Realm," "Finance," "Roles," "Languages," "Templates," "Status," "SubRealms," and "Scheduling

Types." The tabs available to you are based on your assigned user role. Click the tab titles to view the stored data.

A partial view of the **Realm** tab is shown below.



Required fields will be marked with an asterisk. Depending on your user role, some fields may be uneditable.

- **NOTE**: On the "Realm" tab, the Realm ID, Name, and Program fields are always uneditable. If it becomes necessary to change this information, the realm will have to be deleted and a new one created.

If you make a change on any tab with a "Submit" button, you must click **Submit** to save your changes.

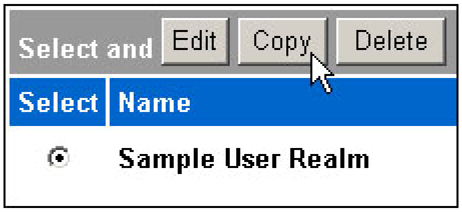
- For detailed information about the data fields in each tab, please refer to the topic *Create a New Realm*.

Copy a realm

To copy a realm, you must first perform a search to find the realm you wish to modify.

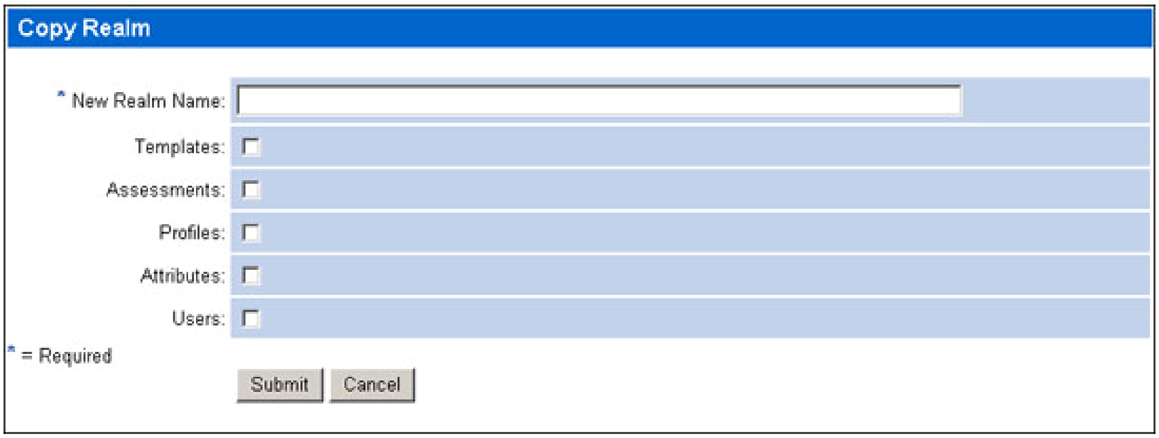
Once the realm is displayed in the search results, select the radio button next to the realm's name.

Click the **Copy** button, located above the list of realms.



You will be asked to choose a new name for your realm. Enter the name in the text entry field.

Then, mark the checkboxes to indicate what data you want to bring over to your new realm (Templates, Assessments, Profiles, Attributes, and/or Users).



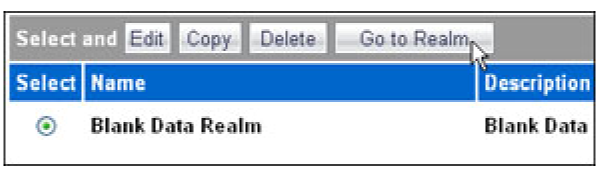
Click **Submit** to create your new realm, or **Cancel** if you do not wish to copy the realm.

Go to Realm

If you would like to go to another realm (without logging out) and access Users, Assessments, etc., or other Realm data you have been given access to, you must first perform a search to find the realm you wish to enter.

Once the realm is displayed in the search results, select the radio button next to the realm's name.

Click **Go to Realm** which is located above the list of realms.



If you are an authorized user within that realm, you will be taken to the Home page of the realm.

If you are not authorized to access the realm, you will receive an authentication error. (Speak to the Realm's Manager if you feel you need access to the realm.)

Delete a realm

To delete a realm, you must first perform a search to find the realm you wish to remove.

Once the realm is displayed in the search results, select the radio button next to the realm's name.

Click the **Delete** button, located above the list of realms.

A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the realm and return to the updated list, or click **Cancel** to return to the list of realms without deleting.

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Create a New Realm

This section describes how to create a new realm and also describes in detail the fields and functionality of each tab. Depending on your user role you may not have access to all the features described. Many of the fields and features of the Realm Management tabs are also accessible by clicking **My Realm**.

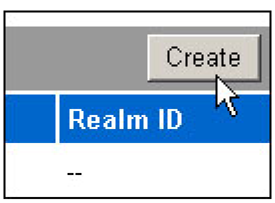
NOTE: The Entities tab is only available under *My Realm*. The Status tab (shown below) is only available under *Realm Management*.

- Create a new realm
  - Realm details tab
  - Finance tab
  - Roles tab
  - Languages tab
  - Templates tab
  - Status tab
  - SubRealms tab
  - SchedulingTypes tab

Create a new realm

Click **Realm Management** from the main menu.

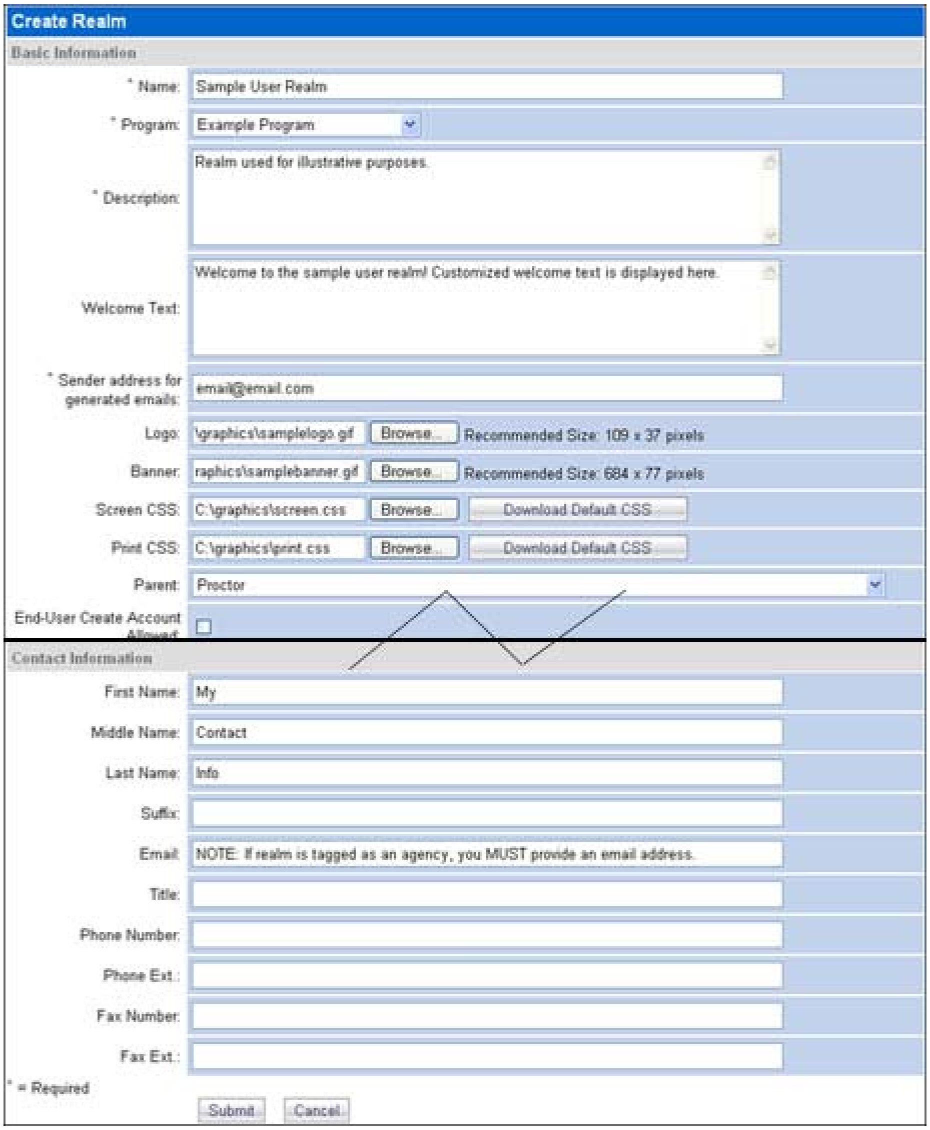
Click the **Create** button located on the far right of the main Realm Management page.



There are several tabs of information associated with each realm. They are labeled "Realm," "Finance," "Roles," "Languages," "Templates," "Status," and "SubRealms." You must first enter the required details on the "Realm" tab before advancing to the other tabs.

Realm details tab

Enter basic realm characteristics and setup information. (Partial view below.)



**Indicates a required field.*

BASIC INFORMATION

***Name**: Enter the name of the realm.

***Program**: Select the associated program from the drop-down box.

***Description**: This is the description that will appear on the list of realms. It should be brief but clear enough to help people identify the realm. Enter the text for the description. HTML code brackets and related symbols are not allowable characters.

Welcome Text: This is optional text that will appear on the realm's "Welcome" page. It is the first page users will see after logging in. Enter the welcome text. Basic HTML code such as font modifications (size, color, etc.), text modifications (including italics, bold, and underline), paragraph breaks, bullets, image source and hyperlinks, etc., are allowable characters.

***Sender address for generated emails**: Enter the return email address to be used in all automated email generated from the realm.

Logo: Each realm can be set up to display a different logo at the top of each screen, just under the Virtual Test Center logo. Create a .jpg image using your favorite graphic tool (recommended size: 109x37 pixels). Click the **Browse** button and browse to find the file you created. Click **OK** to upload the image.

Banner: Each realm can be set up to display a banner across the top of the examinee pages in the VTC RSP (Registration, Schedule, and Payment) application. Create a .jpg image using your favorite graphic tool (recommended size: 684 x 77 pixels). Click the **Browse** button and browse to find the file you created. Click **OK** to upload the image.

Screen CSS/Print CSS: Upload a cascading style sheet to override other style settings (such as fonts, background, layout, etc.) to display and/or print the examinee RSP pages in a style of your choosing. (This will not affect the VTC Administration Console screens.) Click the **Browse** button and browse to find the style sheet you wish to use. Click **OK** to upload the file. You may also download the current CSS file by clicking **Download default CSS**. Click **Open** to view the CSS details or click **Save** to save the file to a location of your choosing.

Parent: Link to a parent realm by selecting the name from the drop-down list of realms. (e.g., Main site location vs. site test centers.)

End-User Create Account Allowed: Use the checkbox to indicate whether the examinees/applicants are allowed to create their own new accounts. If the box is checked, a 'Create Account' link will be displayed on the examinee/applicant login page for the test administration login page (the RSP application). Examinees/Applicants may click the link to create a new account. VTC Administrators will also be allowed to create user accounts in User Management using the VTC Console.

See also the 'Auto-registration' and 'End User Create Account Required' fields below for potential modifiers to this behavior.

Auto-registration: Use this checkbox to indicate whether or not examinees will be automatically registered for assessments when the user account is created. If it is marked, candidates will be pre-registered for those assessments that have also been marked for auto-registration.

NOTE: Assessment Auto Registration only occurs when a user account is created either through the VTC Admin application interface or by the batch loader. (See the *User Batch Load* topic for more information). Or, if you have End-User Create Account Allowed enabled, users who create their accounts will also be auto-registered.

Make Realm Hidden: Use the checkbox to indicate whether other users can see or select your realm. e.g., If the box is checked, users will need the direct link to find the realm. They will not be able to select the name from the drop-down box during login.

Agency: Use the checkbox to indicate whether this realm is marked as an Agency (primarily for MyWorkKeys users). Doing so will automatically add your realm as a subrealm to itself. Disabling the checkbox will remove it. (See the SubRealms tab below.)

End User Create Account Required: Use the checkbox to indicate that users are required to create their own accounts using the RSP application. If the box is checked, VTC Admin Console users cannot set up accounts for other users.

Privacy Policy Required: Use the checkbox to indicate that users creating an account using the RSP are required to accept the Privacy Policy before continuing.

(To customize or configure your privacy policy text, see the Templates tab below.)

Batch Load Priority: Set the default priority level for processing user records for your realm. Numbers range from 1-9, with 9 being the lowest priority in the queue. The default is typically 5 for "normal" processing time. If files come to the queue at the same priority they will be handled in the order they are received.

NOTE: There will be an opportunity for users with access to "escalate" a batch load for higher priority processing should the need arise. However, high priority batch settings should be used sparingly as it is not possible to rush all files to the top of the queue at the same time.

Batch Load Person Update Allowed: Use the checkbox to indicate whether existing user records may be updated via the batch loader. If not checked, User Batch Load may only be used to create accounts; duplicate accounts will not be allowed. (See the *User Batch Load* topic for more information.)

Batch Load Restrict Required Validation: Use the checkbox to indicate that all required attribute data columns must be included in the user record during User Batch Load *and* that the attribute is filled in as required. If the attribute or the required data is missing, the record will return an error.

Batch Load Duplicate Check Required: Mark this checkbox if you want to run the duplicate record check during User Batch Load and duplicate records will not be loaded to your realm.

(To customize which attributes are used in the duplicate record check, see *Create Attributes*, Attribute tab.)

WARNING: Before changing a realm's settings, be sure that any User Batch Load files in that realm have finished processing. Any file already in progress will continue processing while the new settings take effect and may cause the file processing to fail.

CONTACT INFORMATION

Fill in the point of contact information for the Realm Manager.

NOTE: If the realm is marked as an agency in the **Agency** checkbox under Basic Information, the **Email** address field MUST be filled in under Contact Information.

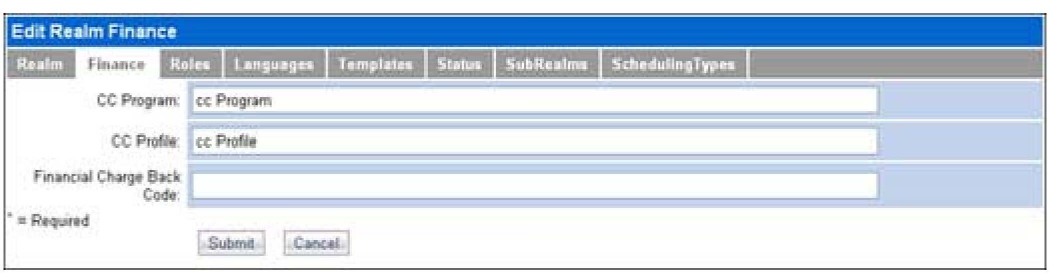
When you are finished entering details in the fields listed above, you must click **Submit** to save your data.

You will advance to the next tab where you can continue setting up your realm.

Finance tab

Enter the credit card information if the realm requires examinees to pay a fee.

- **NOTE**: This information should only be filled in by a staff person in ACT's financial department. Setting or changing this information will require a user with access to the Finance Manager Role.



CC Program: The name used for tracking within the ACT financial system.

CC Profile: The Via Warp profile that is used when the transaction is sent through for charging.

Financial Charge Back Code: Project code used by the ACT Finance department to collect usage data.

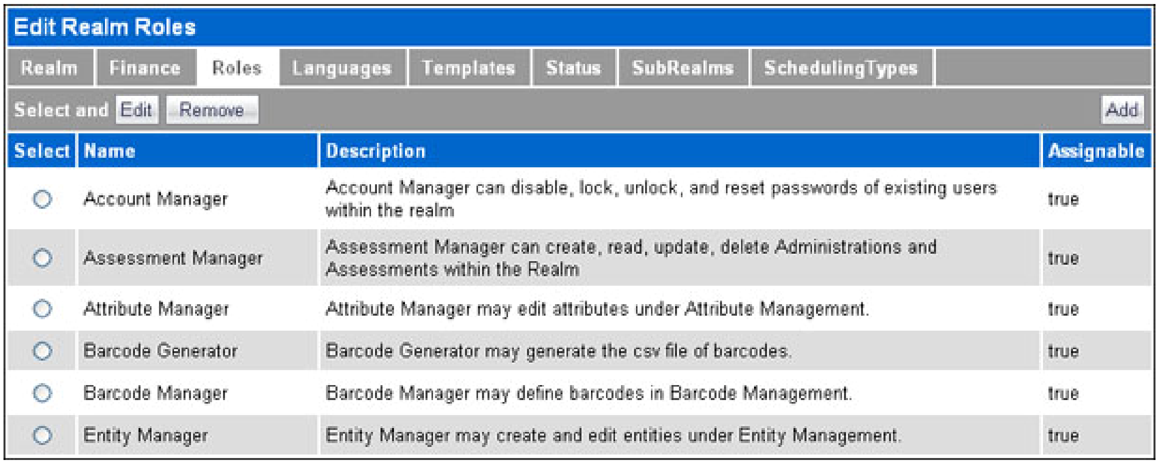
Click **Submit** to save your data.

You will advance to the next available tab where you can continue setting up your realm.

Roles tab

Designate the user roles that are required to access the realm and whether those roles may be assigned by others with that user role. All roles currently in use will be listed.

- **NOTE**: Roles are typically defined by the applications that use VTC. Roles can only be created and/or made visible for Realm usage under System Management.


Edit Realm Roles

Realm | Finance | Roles | Languages | Templates | Status | SubRealms | SchedulingTypes

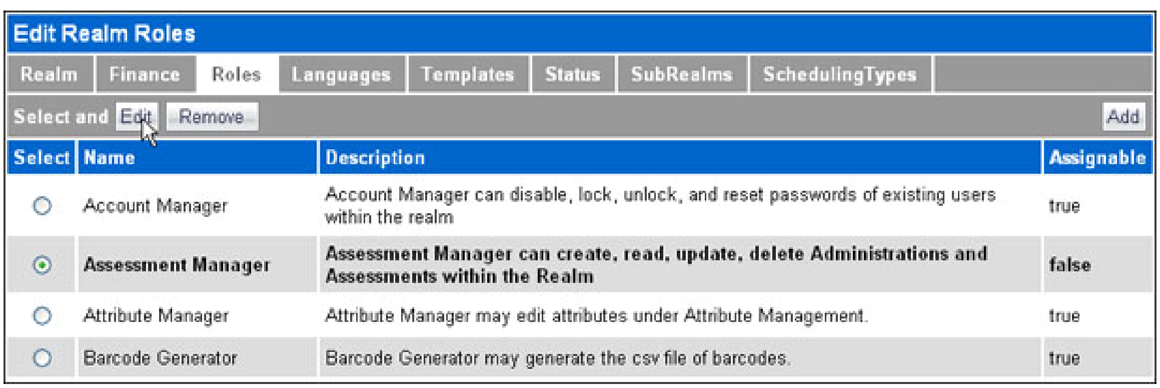
Select and Edit Remove Add

Select	Name	Description	Assignable
○	Account Manager	Account Manager can disable, lock, unlock, and reset passwords of existing users within the realm	true
○	Assessment Manager	Assessment Manager can create, read, update, delete Administrations and Assessments within the Realm	true
○	Attribute Manager	Attribute Manager may edit attributes under Attribute Management.	true
○	Barcode Generator	Barcode Generator may generate the csv file of barcodes.	true
○	Barcode Manager	Barcode Manager may define barcodes in Barcode Management.	true
○	Entity Manager	Entity Manager may create and edit entities under Entity Management.	true

EDIT ASSIGNABLE STATUS

The current status is indicated on the Roles tab in the Assignable column as true or false as shown above.

To change whether the role is assignable, click the radio button to select that role. Click the **Edit** button located above the list of roles.

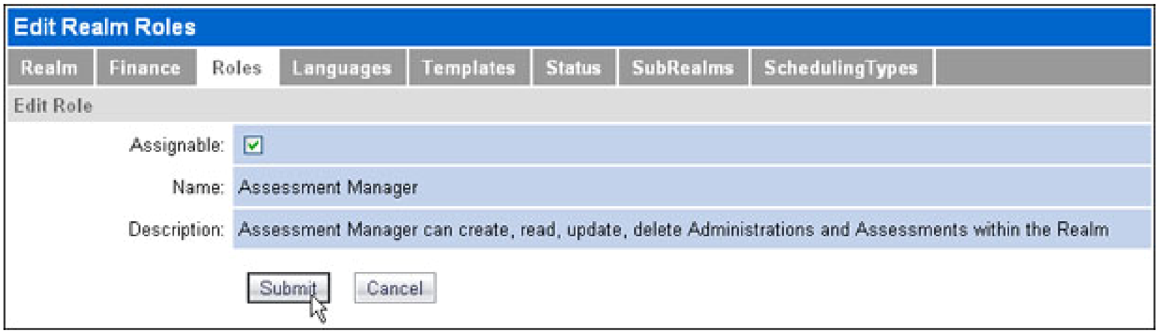

Edit Realm Roles

Realm | Finance | Roles | Languages | Templates | Status | SubRealms | SchedulingTypes

Select and Edit Remove Add

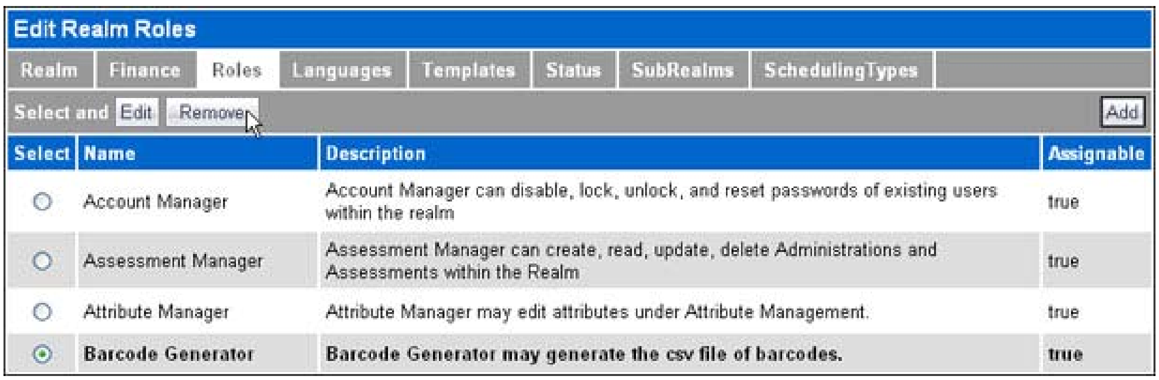
Select	Name	Description	Assignable
○	Account Manager	Account Manager can disable, lock, unlock, and reset passwords of existing users within the realm	true
⊙	**Assessment Manager**	**Assessment Manager can create, read, update, delete Administrations and Assessments within the Realm**	**false**
○	Attribute Manager	Attribute Manager may edit attributes under Attribute Management.	true
○	Barcode Generator	Barcode Generator may generate the csv file of barcodes.	true

Use the **Assignable** checkbox to indicate whether users with this role can assign the role to other users. Click **Submit** when you are finished.



REMOVE A ROLE

To remove a user role from use at your Realm, click the radio button to select the role. Click the **Remove** button.

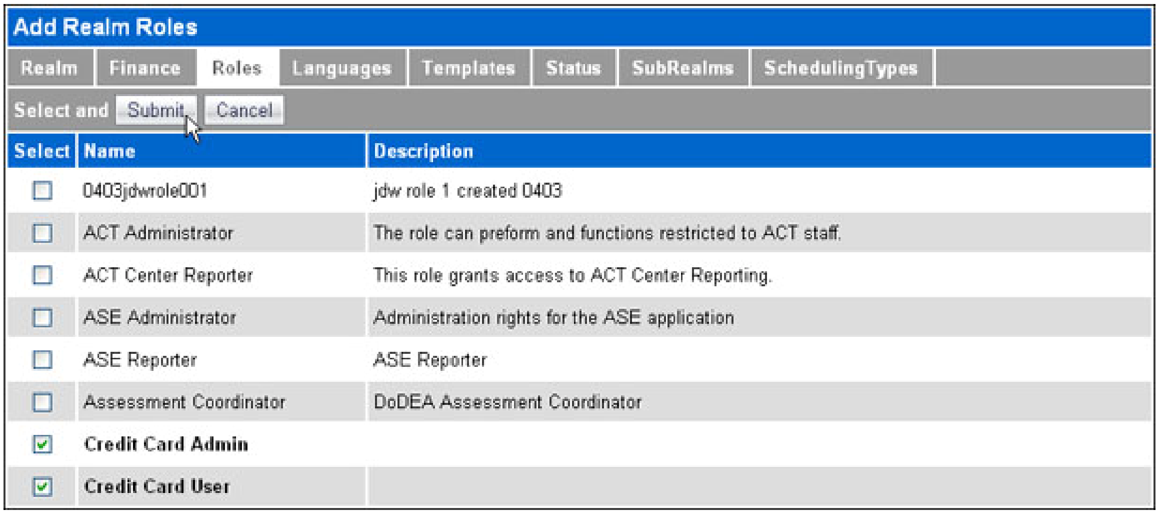


ADD AVAILABLE ROLES

To select additional roles for use at your Realm, click the **Add** button located in the upper right corner.

Mark the checkbox to indicate which user roles are in operation at this realm. The roles you choose will be available for selection when you create or modify an individual user account.

Click the **Submit** button when you are finished.



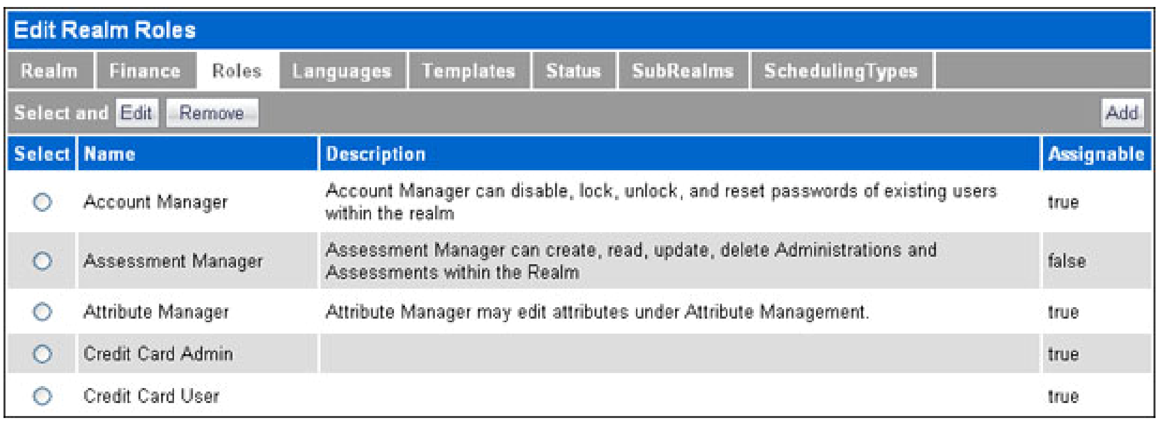
Add Realm Roles

Realm | Finance | Roles | Languages | Templates | Status | SubRealms | SchedulingTypes

Select and Submit Cancel

Select	Name	Description
☐	0403jdwrole001	jdw role 1 created 0403
☐	ACT Administrator	The role can preform and functions restricted to ACT staff.
☐	ACT Center Reporter	This role grants access to ACT Center Reporting.
☐	ASE Administrator	Administration rights for the ASE application
☐	ASE Reporter	ASE Reporter
☐	Assessment Coordinator	DoDEA Assessment Coordinator
☑	**Credit Card Admin**	
☑	**Credit Card User**	

You will return to the Edit Realm Roles screen where the roles will be listed.



Edit Realm Roles

Realm | Finance | Roles | Languages | Templates | Status | SubRealms | SchedulingTypes

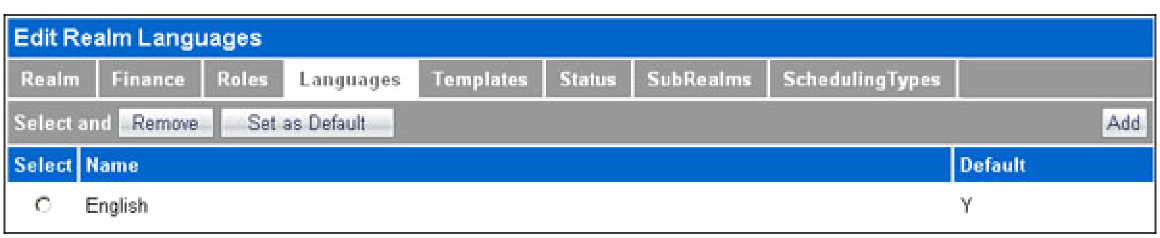
Select and Edit Remove Add

Select	Name	Description	Assignable
○	Account Manager	Account Manager can disable, lock, unlock, and reset passwords of existing users within the realm	true
○	Assessment Manager	Assessment Manager can create, read, update, delete Administrations and Assessments within the Realm	false
○	Attribute Manager	Attribute Manager may edit attributes under Attribute Management.	true
○	Credit Card Admin		true
○	Credit Card User		true

When you are finished with the language settings, click the "Languages" tab (or next tab available to you) to continue setting up your realm.

Languages tab

Set the default language or add language translations for your realm. The current default and language settings will be displayed. For new realms, English is the default language. (The languages will become important when you begin setting up personal and registration attributes.)



Edit Realm Languages

Realm | Finance | Roles | Languages | Templates | Status | SubRealms | SchedulingTypes

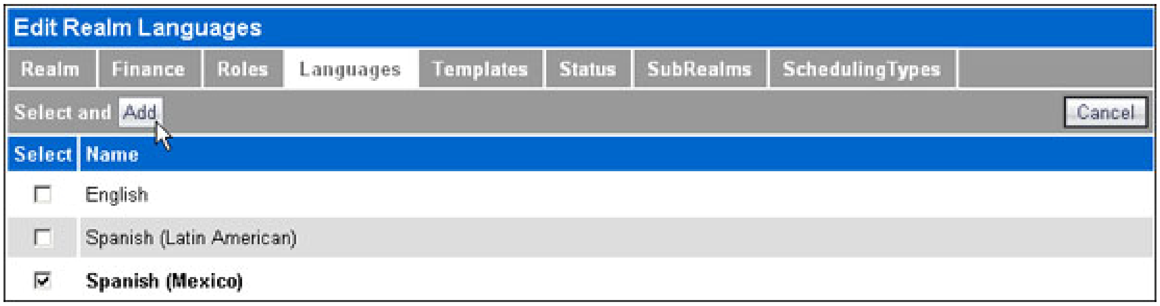
Select and Remove Set as Default Add

Select	Name	Default
○	English	Y

ADD A LANGUAGE

To add a language, click the **Add** button. The list of languages options will be displayed as shown in the image below.

Mark the checkbox next to the language(s) you wish to add and click the **Add** button again. The languages you selected will be included on the list.

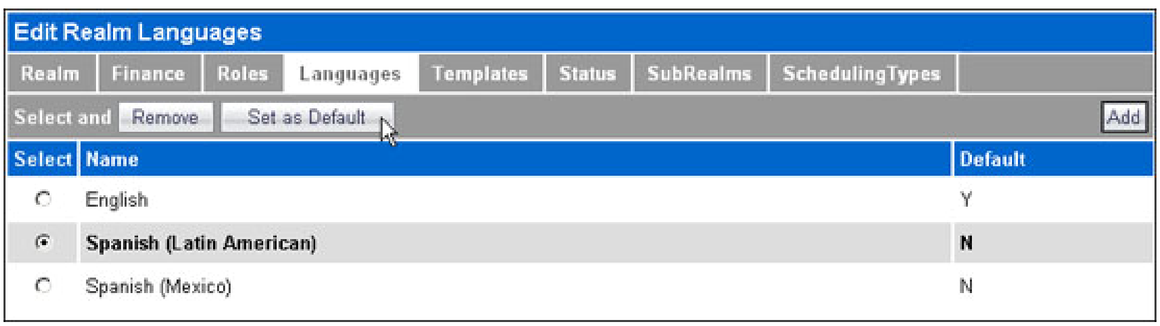


SET LANGUAGE AS DEFAULT

The current default language will be marked with a **Y** in the Default column.

To select a different default language, select the radio button next to the language you wish to set as default.

Click the button **Set As Default**.



REMOVE A LANGUAGE

To remove a language you have previously added, select the radio button next to the language you wish to remove.

Click the **Remove** button.

- **NOTE**: You cannot remove the language currently marked as default and realms must have at least one language.

When you are finished with the language settings, click the "Templates" tab (or next tab available to you) to continue setting up your realm.

Templates tab

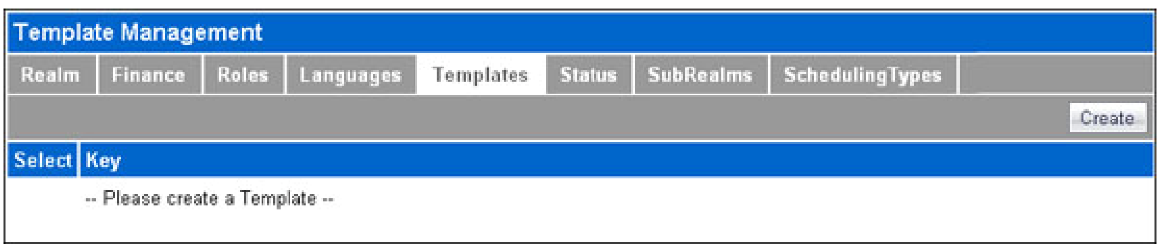
Create templates that will help disseminate important information about your realm to users and examinees. Examples include candidate registration notifications and tickets, scheduling notifications, login information, site-specific information, etc.

All templates used in conjunction with *User Management*, *Group Management*, and *Assessment Management* must first be set up for the purpose they are intended before they can be linked to those features in the realm.

- Please refer to the topics *Create a New User*, *Group Management*, and *Assessment Management* for further details on how templates are used.

You may also create templates that link to specific areas of the RSP, which will allow you to display customized messages to your examinees.

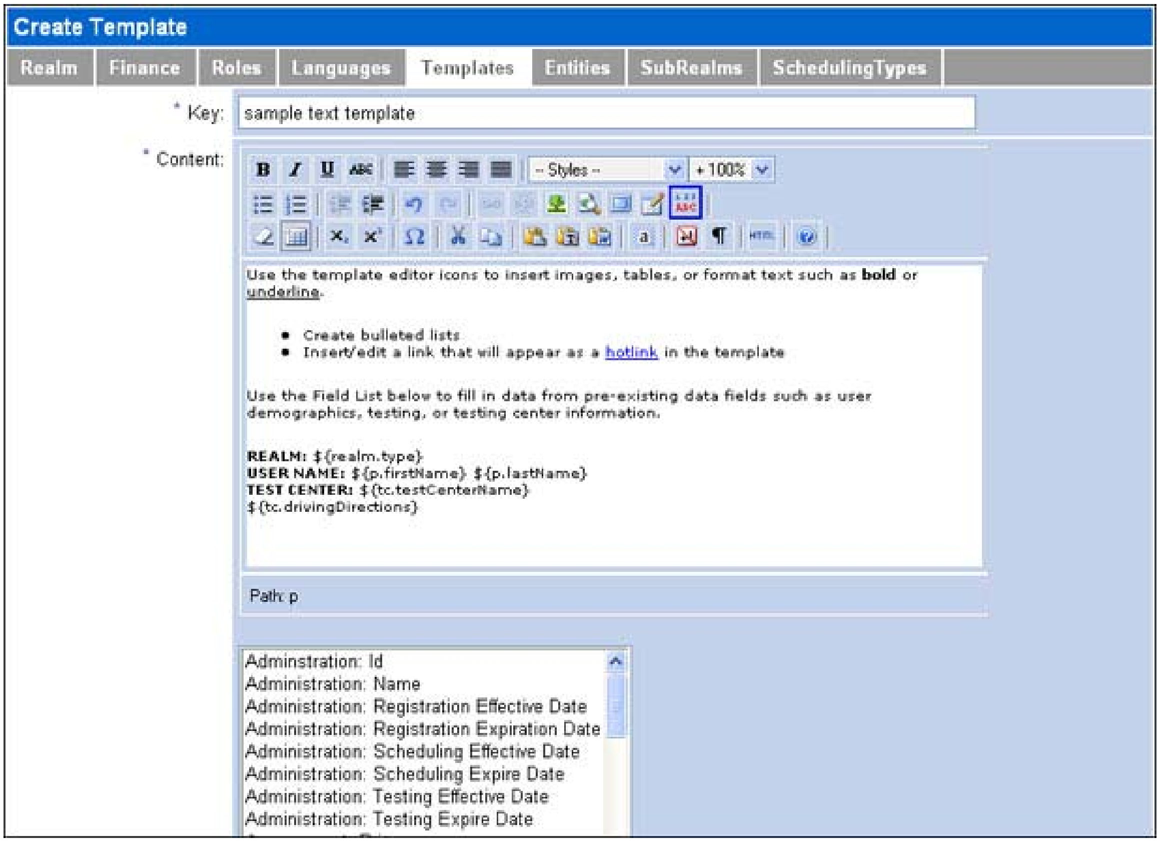
The list of templates that have already been set up will be displayed. If none are listed, you will need to create a template. Choose the subject, content, formatting, and data fields that best suit your needs.



CREATE A TEMPLATE

Create a new template by clicking the **Create** button on the far right side of the screen as shown in the image above.

This will open the Create Template screen.



** Indicates a required field.*

*** Key**: The "subject type" of the template you are creating. Enter a unique template name. e.g., "March exam schedule." Or use a special pre-coded 'key' value for the template which enables the template's use for specific purposes as defined below:

- **_ADA** – During the registration and scheduling process, if a template is created as a registration or scheduling email template, starts the same name as the original template and ends with "_ADA", it will be sent to examinees that have been flagged in the system as ADA examinees.

  For example, if you define a registration template named "Notify Registered" that is selected as the Registration Notification template, and you also have a template named "Notify Registered_ADA", a user that has the ADA flag indicator associated with their account will be sent an email based on the "Notify Registered_ADA" template when that user is registered for an assessment.

RSP and VTC key values – Use of these key values instructs the RSP application to use the content in the appropriate locations. The following key values are <u>not</u> associated with the automated email template selections.:

- **RSP_ADA** – Message that appears on the RSP screen for users who have requested ADA accommodations.
- **RSP_CONTACT_NO** – Phone number to replace default number given in error messages such as disabled account and no security question or email found in **Forgot User ID or Password.**
- **RSP_LOGIN_MSG** – Message that appears on the realm's login page.

- **RSP_LOGOUT_URL** – The body of the template is a fully specified URL. Control will be transferred to this URL when the user logs out of RSP.
- **RSP_MOTD** – Message of the day that will be displayed on the RSP examinee pages.
- **VTC_ADDITIONAL_INFO_PAGE** – Replaces the additional info page for a realm (those realms that have an Additional Info field.)
- **VTC_CONTACT_US_PAGE** – Replaces the contact us page for a realm (those realms that have a Contact Us field.)
- **VTC_CREATE_ACCOUNT** – When an account is created, this information will be emailed to the new user if an email address is provided.
- **VTC_ERROR_MSG** – Customized error message that replaces the generic error message in VTC and in RSP.
- **VTC_PRIVACY_POLICY** – Customized text that replaces the generic ACT privacy policy. Users will see this message as pop-up text when they click the Privacy Policy link in the RSP pages.
- **VTC_PRIVACY_POLICY_URL –** Rather than link to a pop-up privacy policy, you can link to a URL by entering the web address in the Content field. Users will launch the URL in a separate window when they click the Privacy Policy link in the RSP pages.

  NOTE: You may only link to the VTC_Privacy_Policy *or* VTC_Privacy_Policy_URL. If you enter both templates, the URL will supersede the pop-up text.
- **VTC_REFERENCE_URL** – Entering an alternate URL address in the Content field replaces the reference guide for the realm. Users clicking **References** will no longer open the Online Help Guide.

* **Content**: There are three rows of commands above a large text entry field. Use the following commands in the template editor to help you write the text and content of your template. Mouse over the icon to remind you what the command is for.

The first line of icons is your text-based, style commands:

- **Font Style**: Use **B**, **I**, **U**, and **ABC** to make fonts appear in Bold, Italic, Underline, and/or Strikethrough.
- **Alignment**: Use the alignment icons to shift the alignment of your paragraphs to Left, Center, Right, or Full justification.
- **Magnify Content**: Use the drop-down box to Enlarge your content up to two and half times larger. (This does not alter the final size, only the appearance in the Template Window.)

  NOTE: For the true view of your selected layout, be sure to click the **Preview** icon in the Template editor.

The second line of icons is your lists, tables, and other visual formatting commands:

- **Lists**: Indicate whether you want bulleted or numbered lists (**Unordered** or **Ordered**.)
- **Indent**: Use the **Outdent** or Indent keys to shift your content to the left or right.
- **Undo**: Use **Undo** and **Redo** to retract or retrace your most recent actions.
- **Insert/edit link**: If you type a web address in the content, the address will be auto-formatted as an active hyperlink. If you want text to appear as a hotlink to the web address, highlight the text where you want to create a hotlink. Click the **Insert/edit link** icon. A pop-up box will appear.

Enter the **Link URL** and page **Title**. (The **Target** field is automatically set up to open a URL in a new window.) Click **Insert** to add the hotlink.

- To verify the hyperlinked text is active, be sure to click the **Preview** icon in the Template editor.

- **Unlink**: If you do not want a link to be active, click once on the link to activate the Unlink icon. Click **Unlink** to deactivate the hyperlink.
- **Insert Image File**: Use **Insert/edit image** to insert the realm's logo or banner into the template content. Click the drop-down box to select the image from the **Image List** field which will populate the rest of the fields. (You may edit the Image Description or Title fields if you wish.)

  Once the image is placed, you may click and drag it to a new location if you need to.

  To edit the image or view image properties, click once on the image, and again on the **Insert/edit image** icon. Or, right-click the image and on **Image Properties**.
- **Preview Template**: Use the **Preview** icon to launch a separate window where you can preview the format and layout of your template. Close the preview window when you are finished, taking care not to close the VTC Console window.

  Please note the Preview *icon* is not the same as the Preview button below the template editor. The **Preview *button*** will convert any content field codes you may have selected to populated text but it is not necessarily an accurate representation of layout.
- **Fullscreen**: Use **Toggle fullscreen mode** to maximize the template editor window view. Click it again to switch back.
- **Insert Tables**: Use the **Insert Table** icon to insert a table into your template. Use the tabs, drop-down boxes, and data fields in the table editor to select your table properties. Then click the **Insert** button to place the table in your template.
  - To edit a table after it has been inserted, right-click on the table to access the table editor and properties menu.
- **Word Count**: Use the **Word/Character Count** icon to show you the word and character count of your content, with and without spaces.

The third line contains your character and code formatting commands:

- **Remove Code Formatting**: Highlight text and then click **Remove formatting** to get rid of existing formatting (often used in conjunction with Select All).
- **Invisible Elements**: Use the **Toggle guidelines/Invisible Elements** icon to make certain elements of the content window visible or invisible (such as table borders.)
- **Sub/Superscript**: Use the **X_2** and **X^2** icons to make fonts appear in Subscript or Superscript.
- **Custom Symbols**: Use the **Omega** icon to insert a custom character (such as certain math symbols, a tilde, an accent character, Greek letters, etc.)
- **Text Editing**: Use **Cut** and **Copy** to help move sections of text, tables, or images from one place to another, or from one template to another.
- **Paste text within Template Editor Window**: Click the **Paste** icon to paste the copied text in its new location.

  The first button is the default paste from the clipboard, which you can also activate by pressing CTRL-V or right-click-paste. The standard paste option retains copied formatting but replaces two standard spaces with one standard space and one non-breaking space.

- **Paste non-formatted text as Plain Text**: In order to help you speed up the template writing or editing process, you have to option to draft your text external to the VTC Console. When you are ready, copy the text from the application you used, and click the template editor Window icon **"T"** to **Paste as Plain Text**.

  The plain text paste option removes all formatting and replaces two standard spaces with one standard space.

- **Paste formatted text from Word**: If you draft your text in Microsoft® Word®, copy your text in Word, then use the template editor icon **"W"** to **Paste from Word**.

  For example, you may find it easier to create complex tables in Word rather than in the template editor window. You can paste the table into the editor and most of the properties will be retained. The paste from Word option replaces two standard spaces with one standard space and one non-breaking space.

  NOTE: Please be aware that some formatting may ***not*** be retained. To see how it will be presented to end-users and test your formatting, be sure to click the **Preview** button below the template content window.

- **Select All**: Use **Select All** to highlight all of the content in the text entry field.
- **Non-breaking Space**: Use the **Non-breaking Space** icon to force non-breaking space characters between template content. The presence of non-breaking spaces can be used to prevent text from wrapping across natural line breaks or force spacing between sentences.

  For example, if you prefer two spaces between sentences whether it is displayed on-screen or printed, use one standard space and one non-breaking space. This will ensure that spacing remains consistent.

- **Reveal Formatting**: Similar to **Show/Hide** in Word, use the paragraph symbol to toggle Visual control characters on/off (such as spaces).
- **HTML**: If you prefer to write your template in HTML code, click **HTML**. A pop-up window will appear, converting any existing content to HTML. Enter any new content using properly formatted HTML code. Click **Update** when you are finished. Your new content will be displayed in the template window. (**NOTE**: The HTML editor will not correct mistakes and may inadvertently erase content if you submit improperly closed tags.)

Field list: Insert a "call" code for specific information about the realm, exam and scheduling information, or examinee data. Place your cursor in the text entry field where you want to insert the text and double-click the field name.

e.g., instead of addressing a generic email to "Dear Examinee," you can insert the user's first and last name by selecting those fields. When the email template is sent, "Dear ${p.firstName} ${p.lastName}," will be populated with the examinee's data.

Certain fields (listed below) are not always available for a template to interpret the data call when data is not present. If text is present, the text or data will be displayed. If data is not available the field will be blank. These fields may be customized with If / Else text to show specific text instead of a blank.

e.g., if your Realm does not require users to enter their DOB, and the DOB field is in the template, you can code different text in the "Else" tag so that "N/A" will display in the DOB field instead of a blank.

Field displays blank DOB: <#if p.dateOfBirth??>${p.dateOfBirth?date}<#else></#if>

Modified field displays "N/A": <#if p.dateOfBirth??>${p.dateOfBirth?date}<#else>N/A</#if>

These special fields include:

Administration: Registration Effective Date
Administration: Registration Expiration Date
Administration: Scheduling Effective Date
Administration: Scheduling Expire Date
Administration: Testing Effective Date
Administration: Testing Expire Date
Person: Phone Number
Person: Fax Number
Person: Cell Phone Number
Person: Date Of Birth
Registration: Starting Date
Registration: Ending Date
Appointment: Date
Test Center: Telephone Number

- **IMPORTANT**: If you are using an older template and you chose one of the fields listed above, it may still be using the previous tag which may not validate your data correctly. If you are experiencing template or email errors as a result, delete the existing field value and select the new field and code in its place. As you modify or create templates based on existing ones, update these fields as a precaution. This should not be an issue for new templates.

The "Submit" button is located below the Field list at the bottom of the screen.

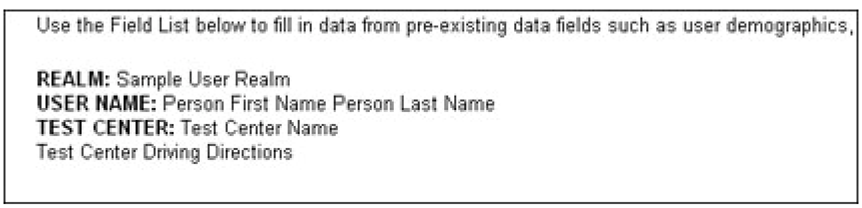
You must click **Submit** when you are finished writing or editing your template content or all of your work will be lost.

PREVIEW TEMPLATE CODES

Click the **Preview** button located below the data input fields to show the populated text view of any data fields you may have selected for use in your template.

- Please note the Preview *button* is not the same as the Preview icon located in the template editor. Clicking the **Preview *icon*** will show you an accurate representation of layout and formatting but will not convert any content field codes you may have selected to populated text.

This will display the template codes you selected as populated text fields.



If you are satisfied with the template's appearance, click **Submit** to save your work and return to the list of templates.

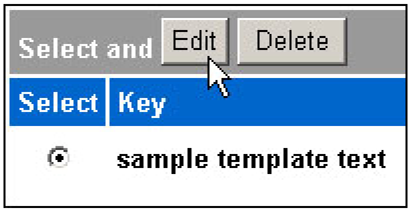
Or, click **Edit** to return to the template editor and continue making changes.

You may also click **Cancel** to return to the template selection menu without accepting the recent modifications.

EDIT TEMPLATE

From the list of templates, select the radio button next to the template you wish to modify.

Click the **Edit** button to view your template.



- Please review the section above on "Create a Template" for a detailed description of the template fields.

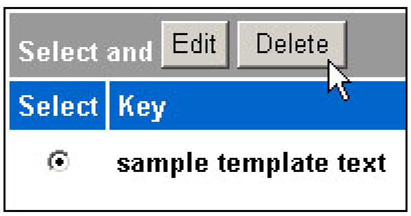
When you are finished making changes, you may click to **Preview** your template and view your changes.

Or, click to **Submit** your changes and return to the template list.

DELETE TEMPLATE

From the list of templates, select the radio button next to the template you wish to remove.

Click the **Delete** button.



A pop-up box will display. Read the message carefully before confirming your choice.

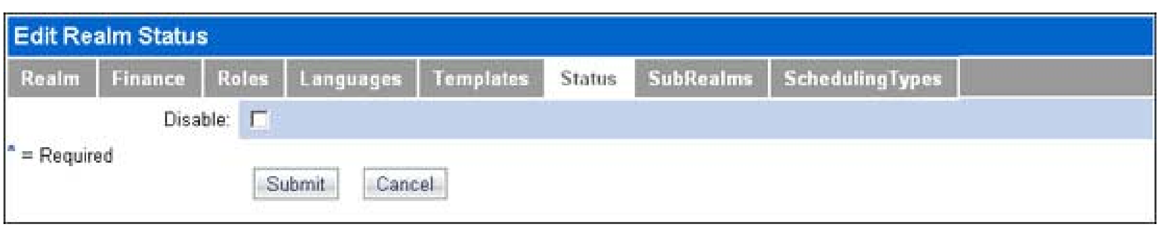
Click **OK** to return to the updated list of templates, or **Cancel** to return to the list without deleting.

When you are finished creating and/or modifying templates, click the **Status** tab to view or modify your realm's status.

Status tab

From the "Status" tab, you may check or change the status of the realm.

Use the checkbox to disable or enable the realm.



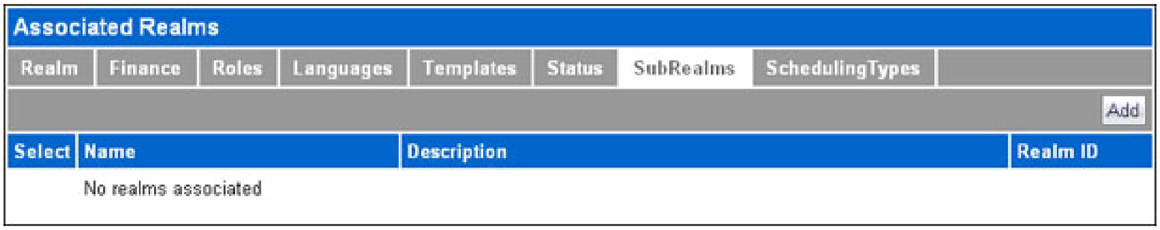
If you have changed the status, you must click **Submit** to save your data and return to the list of realms.

After you have entered and submitted the data in each tab, you can review the data by clicking the tab's title.

SubRealms tab

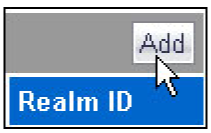
If your user ID is linked to other realms, you may add one or more of those realms as a SubRealm. Also, if your Realm has been marked as an Agency in the Realm tab, it will automatically be set up as a SubRealm of itself. (SubRealms are primarily for "MyWorkKeys" users.)

From the "SubRealms" tab, you may view, add, or remove associated realms, and manage administrator accounts that are linked to the SubRealm.



Add a SubRealm

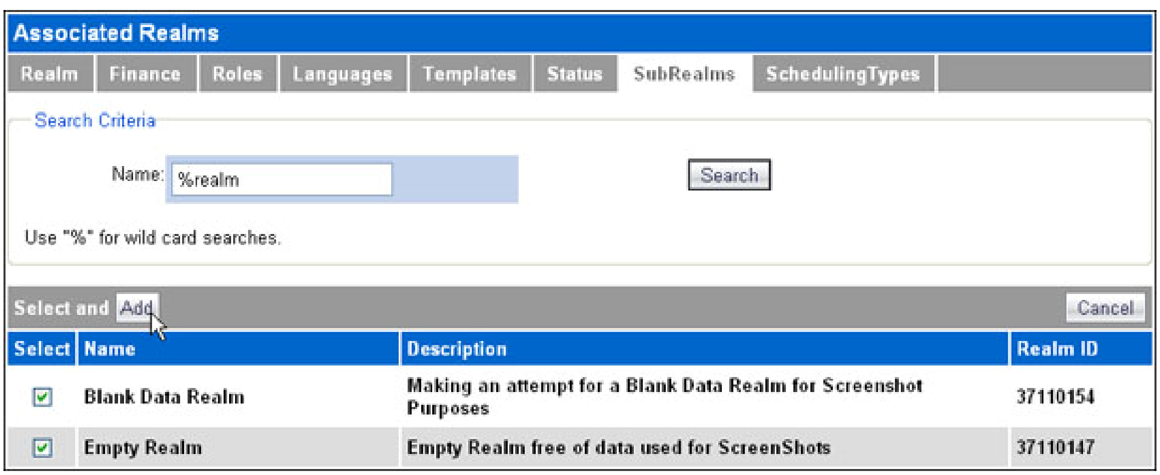
To link SubRealms, click the **Add** button on the far right side of the screen.



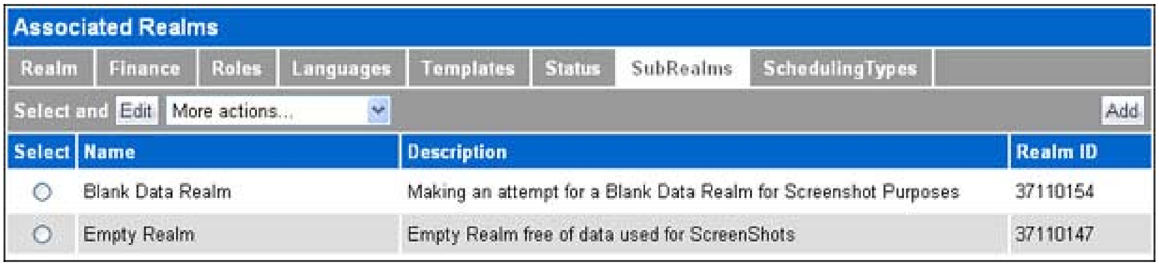
All of the available realms you are associated with will be displayed. If you have more than one page of results, use the navigational buttons at the bottom of each page to scroll through the list and locate the realm you wish to add. If you need to narrow down the list of results, use the search tool.

When you see the realm you want to link, mark the checkbox next to the name.

Click the **Add** button. Add buttons are located on each page above and below the list of results.



This will return you to your list where your SubRealms will be displayed.

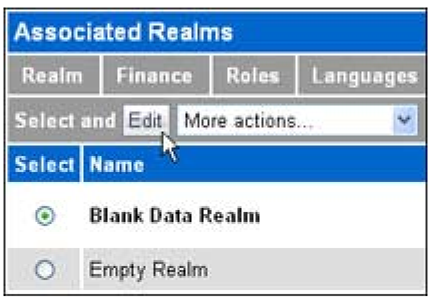


IMPORTANT TO NOTE: If you are using the Realm function *Financial Profiles* in the parent realm, you must also set up the same Realm Financial Profiles in the subrealm before you can select it for use as a subrealm. You cannot select a subrealm with different Financial Profiles.

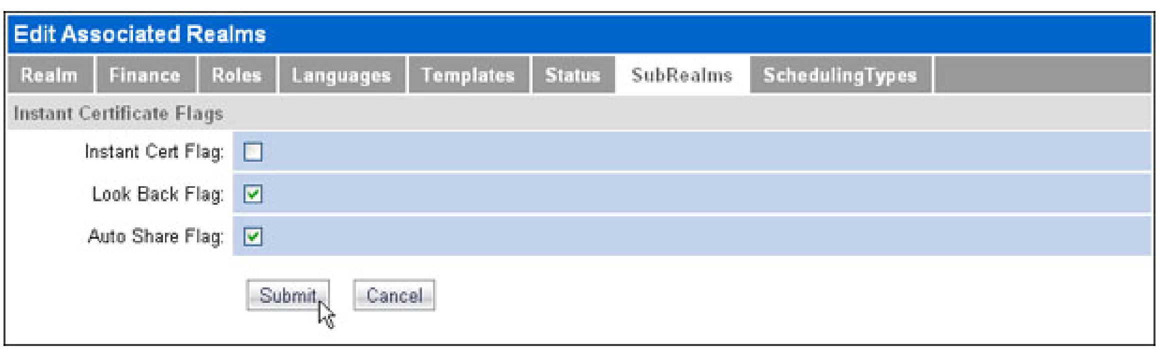
EDIT A SUBREALM

To edit the SubRealm options for a given site on your list, select the radio button next to the realm you wish to edit.

Click the **Edit** button located above the list of SubRealms.



From this screen you can modify the Instant Certificate flags attached to this subrealm. Check the box to indicate which flags you want set.



Instant Cert Flag: Mark the **Instant Cert Flag** to turn instant certificate processing on when test results are received from that particular testing site. (Instant certificates will be generated to show test scores and other pre-defined user data fields.)

Look Back flag: If the instant certificate processing flag is on, mark the **Look Back Flag** to notify the system to include all of an individual's assessments, both current and past, when making the determination if a certificate should be created for the individual.

If the flag is not set, only the current tests from the processing bundle will be used to generate instant certificates.

Auto Share Flag: Mark the **Auto Share Flag** if you want Instant Certificates to be shared with the public. This allows employers or other authorized users to log in and verify results.

Click **Submit** to save your settings and return to the SubRealms list.

MORE ACTIONS... (DROP-DOWN BOX)

- Manage administrators
- Remove a SubRealm

MANAGE ADMINISTRATORS

Add SubRealm administrator

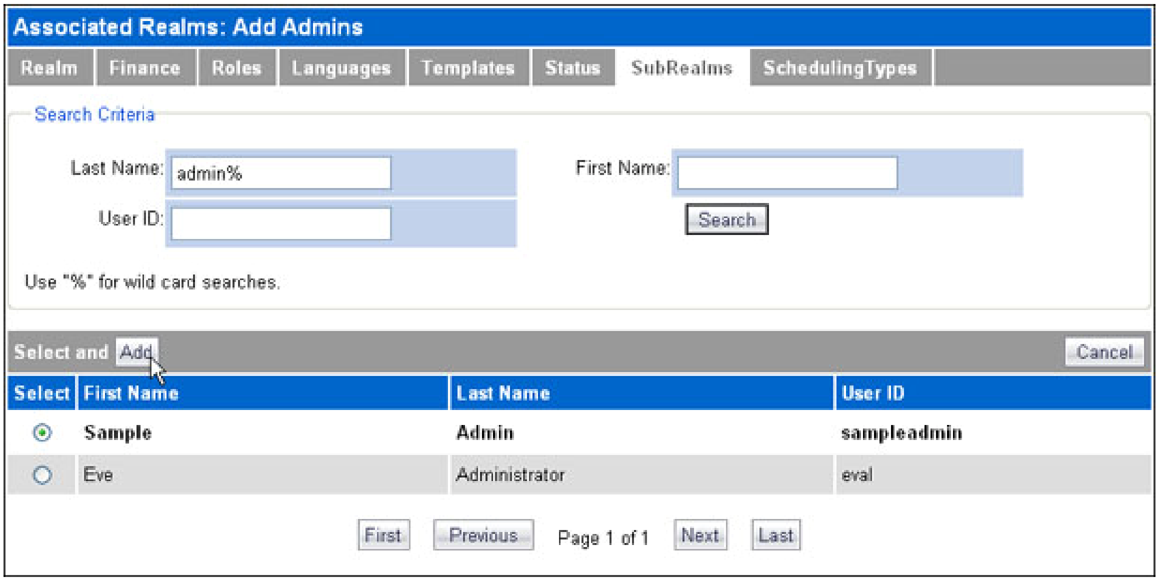
To link an administrator account to your SubRealm, first select the radio button next to the SubRealm. Next, select **Manage Administrators** from the drop-down box.

Any existing administrators will be displayed. To add to or begin your list, click the **Add** button.

If you do not know the exact name of the user you are looking for, use the % sign as a wild card character to enter any part of the name the search criteria fields. (Or, you may leave the search fields blank to display all available user names.)

Make your criteria selections and click the **Search** button. The search results will be displayed below the criteria list.

Select the radio button next to the name of the account you wish to add as a SubRealm Administrator. Click **Add**.

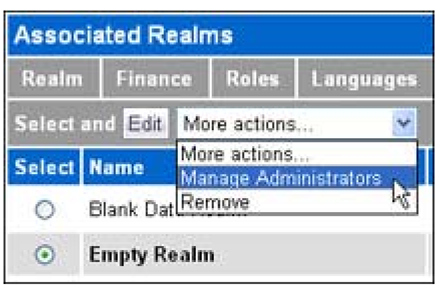


The name will be displayed on your list of administrators.

- **NOTE**: By default, administrator accounts are automatically set up to receive summary emails regarding the Instant Certificate process. If you do not wish to send these email notifications, you must **Edit** the administrator data as described below.

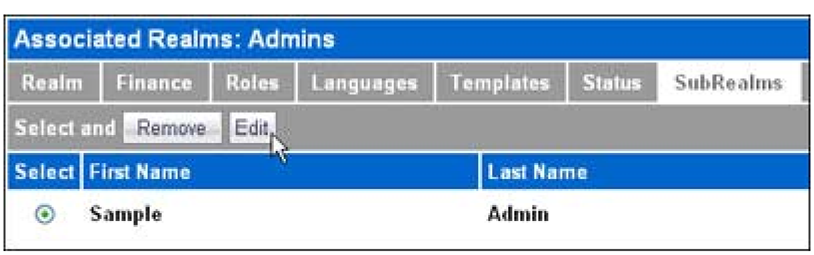
Edit SubRealm administrator summary email (on/off)

If you are not already on the SubRealm administrator page, first select the radio button next to the SubRealm. Next, select **Manage Administrators** from the drop-down box.



To edit the administrator's summary email preferences, select the radio button next to the administrator name you wish to edit.

Click the **Edit** button located above the list of names.



Click the checkbox to indicate whether the administrator will receive the Instant Certificate summary emails. Click **Submit**.

This will return you to the list of administrators.

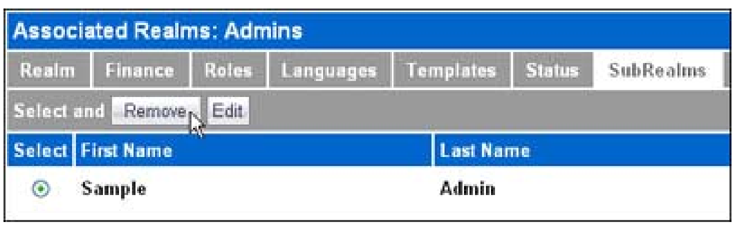
Remove SubRealm administrators

As with Edit SubRealms, you must be on the SubRealm administrator page.

From the list of SubRealms, select the radio button next to the SubRealm. Next, select **Manage Administrators** from the drop-down box.

To remove the administrator's association to your SubRealm, select the radio button next to the administrator's name you wish to remove.

Click the **Remove** button located above the list of names.

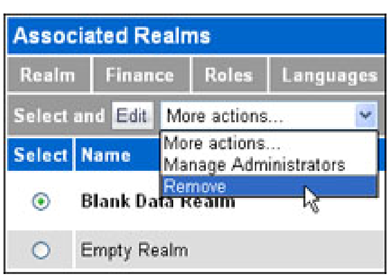


The site administrator will be removed from the list.

REMOVE A SUBREALM

To remove a SubRealm from your list, select the radio button next to the realm you wish to remove.

Click the drop-down box located above the list and select **Remove**.



The SubRealm will be removed from the list.

SchedulingTypes tab

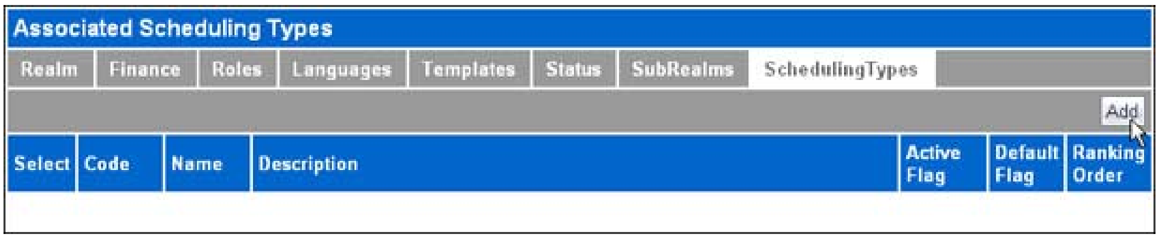
If Scheduling Types have been set up under *Program Management* by ACT Administrators for your Program, the Realm will automatically default to the Program's settings.

Use this section under Realm Management to further customize the Scheduling Types for each realm.

- If Scheduling Types have not been set up for your System, you will not be able to use this feature for the realms that are linked underneath.

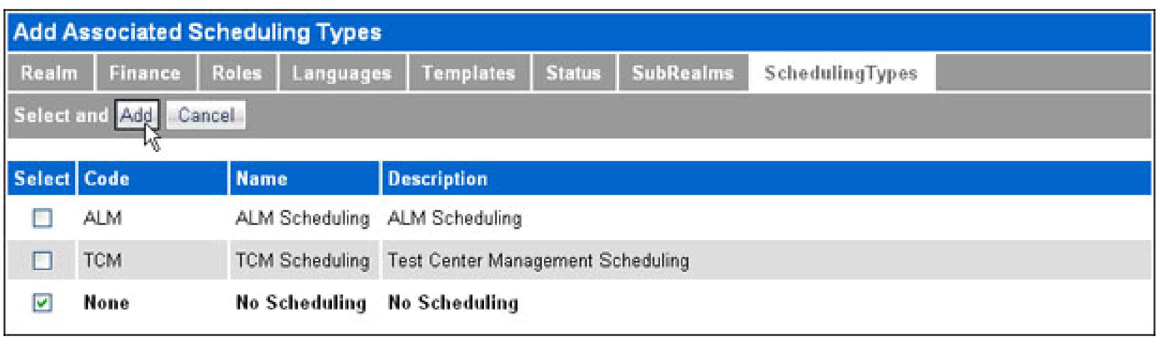
ADD AVAILABLE SCHEDULING TYPES

To select available Scheduling Types for use at your Realm, click the **Add** button located in the upper right corner.

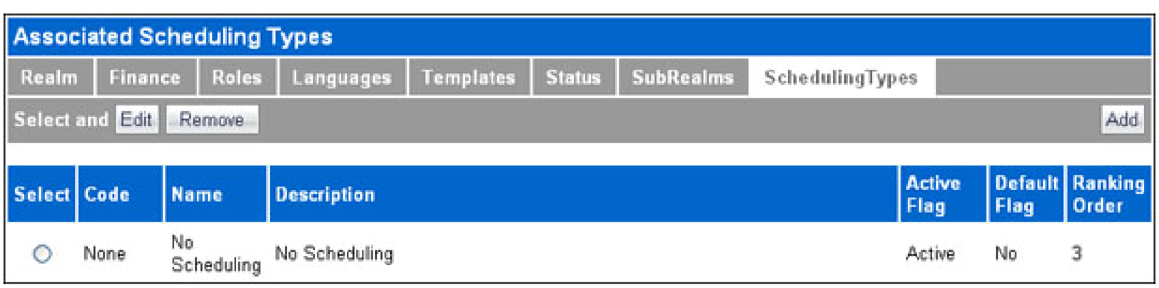


Mark the checkbox to indicate which Scheduling Types are in operation at your realm. The types you choose will override the settings and selections set up for the Program level.

Click the **Submit** button when you are finished.



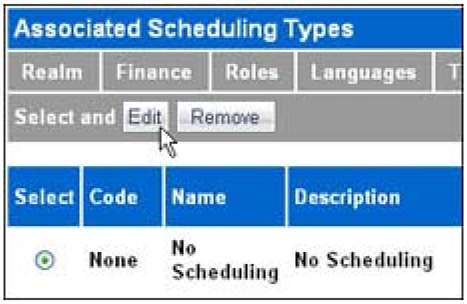
You will return to the Associated Scheduling Types screen where the scheduling types will be listed.



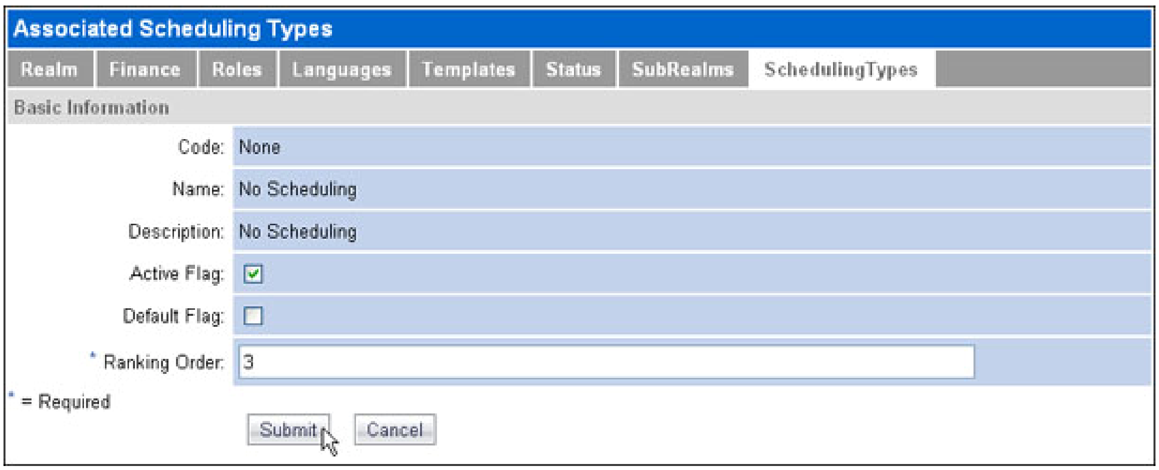
EDIT SCHEDULE TYPE

The current Active Flag, Default Flag, and Ranking Order are indicated in the columns on the Schedule Types tab as shown above.

To change these settings, click the radio button to select that Scheduling Type. Click the **Edit** button located above the list of types.



Use the checkboxes to set the Active and Default flags, and set the numerical value for the Ranking Order by typing a number in the field.



Active Flag: This field is not yet functional at the Realm level and must be set by the System.

Default Flag: This field is not yet functional at this time.

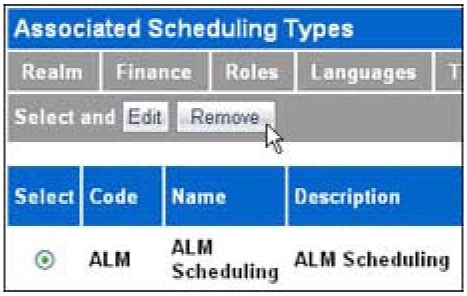
Ranking Order: The order that your schedule types will be displayed on-screen.

Click **Submit** when you are finished.

You will return to the Associated Scheduling Types screen.

REMOVE A SCHEDULE TYPE

To remove a type from use at your Realm, click the radio button to select the Scheduling Type. Click the **Remove** button.



The ScheduleType will be removed from the list.

NOTE: After a realm is created, you must link at least one user account to the new realm. You can either go to *User Management* to assign an existing or newly created account to the realm, or log into the new realm as an Ultra User and create the accounts you need. Either method you choose, you must log into the new realm to set up the User Roles for each account before those users can log into their new realm.

Typically, you would first create one administrative access type account for the new realm and that person would be responsible for setting up the rest of their user accounts.

- For a detailed description on setting up user accounts, please refer to the topics on *User Management* *or* *Create a New User*.

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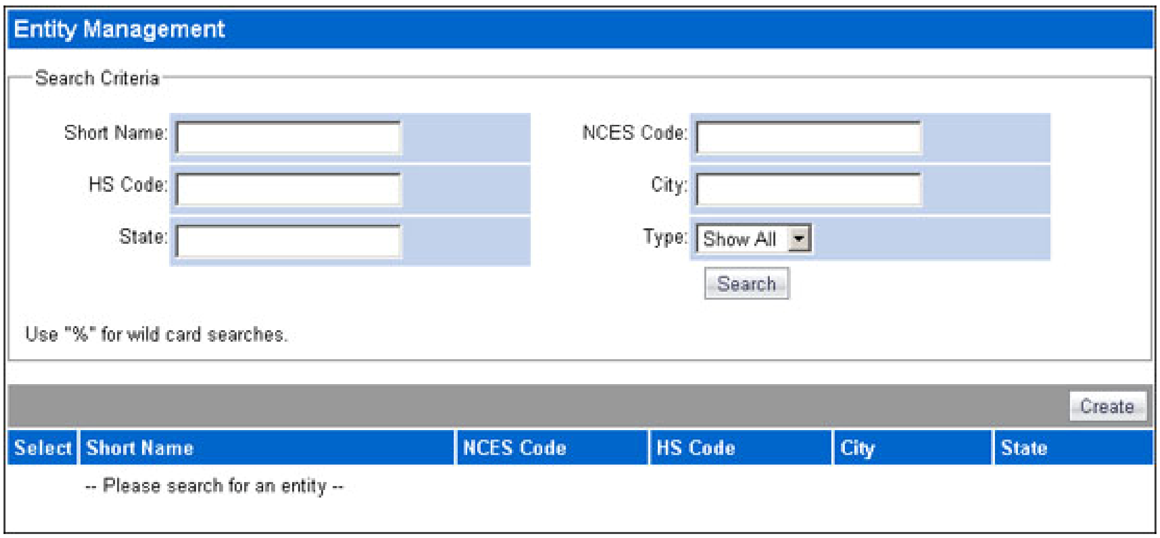
Entity Management

User Role Access: Ultra User, Entity Manager

Entities are institutions or schools. Use Entity Management to set up entities and the corresponding contact lists for those institutions. Entities may later be linked to realms and to assessments that are used by the institutions.

Click **Entity Management** from the main menu to search for an existing entity to view, edit, or delete, or to create a new entity. You may also manage the contact list for the entity.

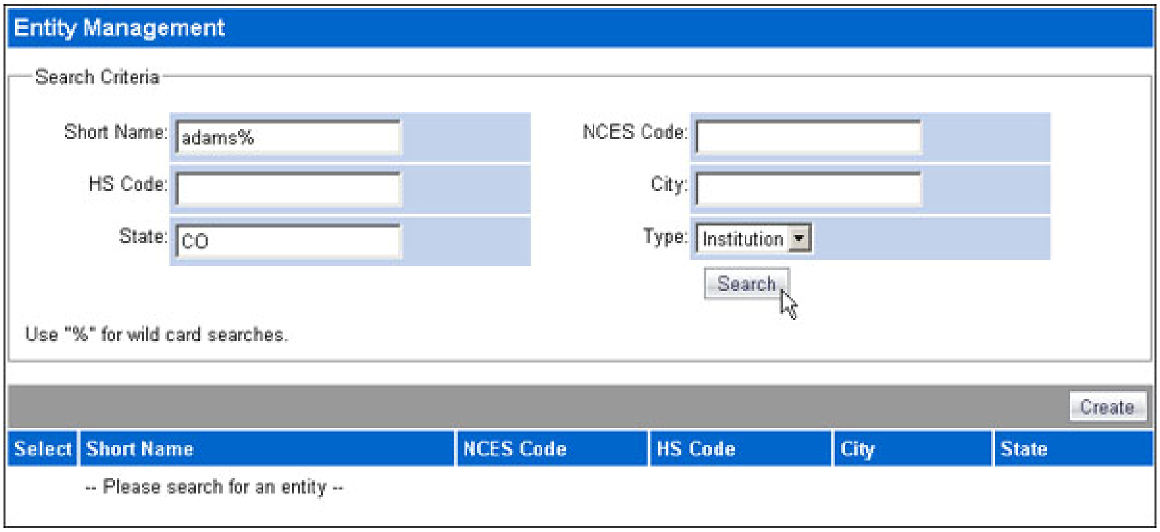


- Search for an entity
- Edit an entity
    - Edit/create entity persons list
- Delete an entity
- Create a new entity

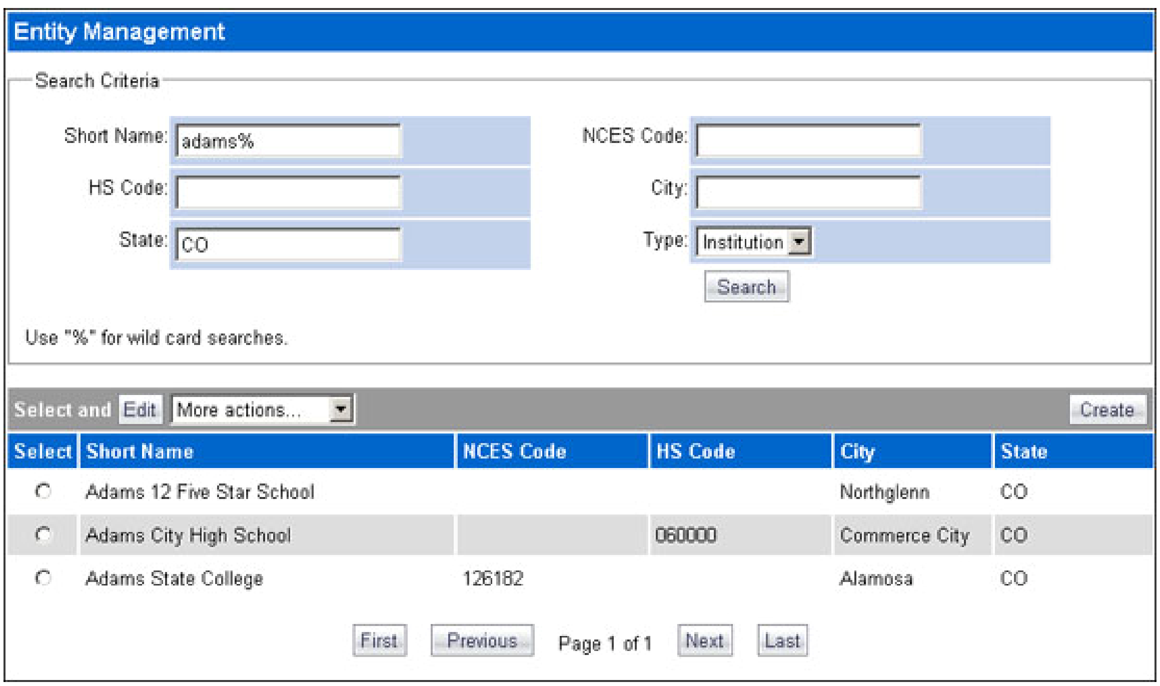
Search for an entity

In the search criteria text entry fields, enter text in the Short Name or City fields, a 2-letter state abbreviation in the State field, and/or numerical values in either of the code fields. If you wish, use the % sign as a wild card character to help you. Use the drop-down box to select Institution or Show All.

Make your criteria selections and click the **Search** button. (Or, you may leave the search fields blank to display all available institutions.)



The search results, including the entity's name, NCES Code, HS Code, City and State will be displayed beneath the search criteria, in the lower frame.



If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

- If there are too many pages of results and you are having trouble locating the realm you want, narrow your search criteria and try again.

Edit an entity

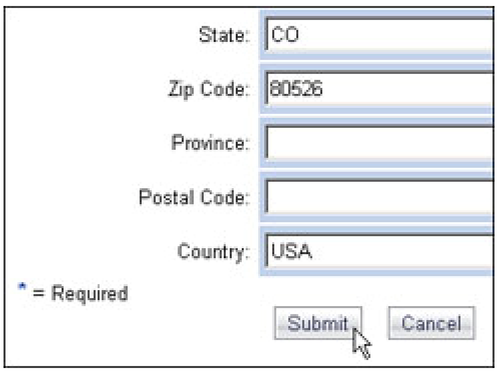
To Edit an entity, you must first perform a search to find the entity you wish to modify.

Once the entity is displayed in the search results, select the radio button next to the entity's name.

Click the **Edit** button, located above the list of entities.

This will display the stored data for the entity. Required fields will be marked with an asterisk.

If you make any modifications, you must click **Submit** to save your changes.



- For detailed information about the data fields, please refer to the section on "Create a new entity" later in this topic.

You will return to the list of entities.

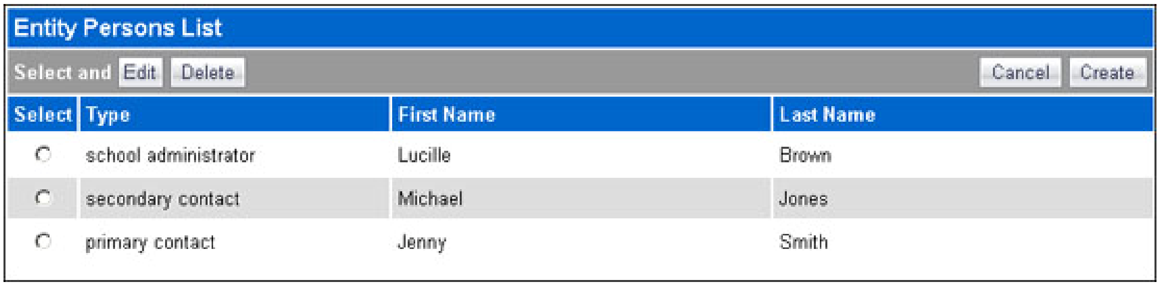
Edit/create entity persons list

You can maintain a contact list of people from the institution or entity by creating a persons list.

To view the persons list for the entity, select the radio button next to the entity's name.

Use the drop-down box located above the list of entities and select **Edit Persons**.

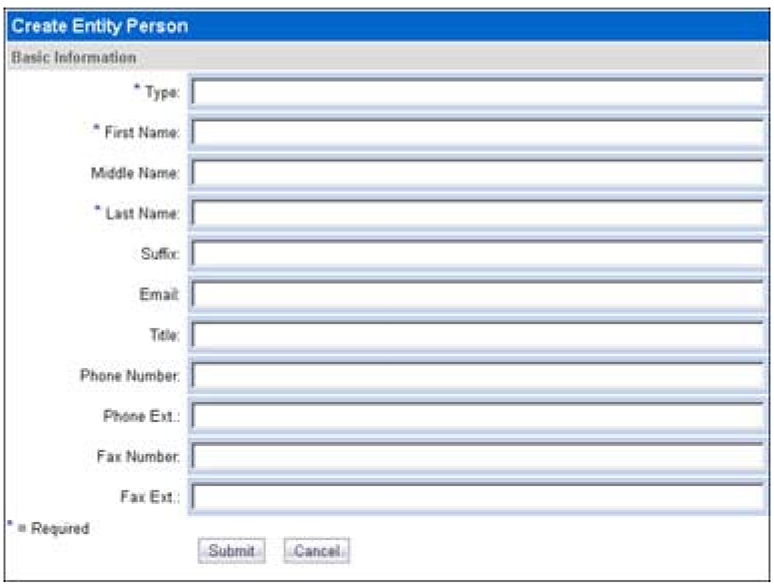
This will display the existing contact list associated with the entity, if contacts have been entered.



ADD LIST PERSON

To add a person to your list, click the create button located at the far right of the screen.

Enter the necessary details such as the type of contact, contact name, address, email address, fax, etc., for the contact person. An asterisk indicates which fields are required.



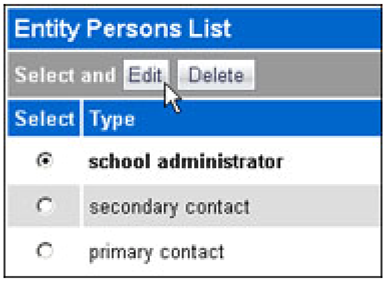
Click **Submit** when you are finished.

You will return to the entity persons list where you will see the new listing you created.

EDIT LIST PERSON

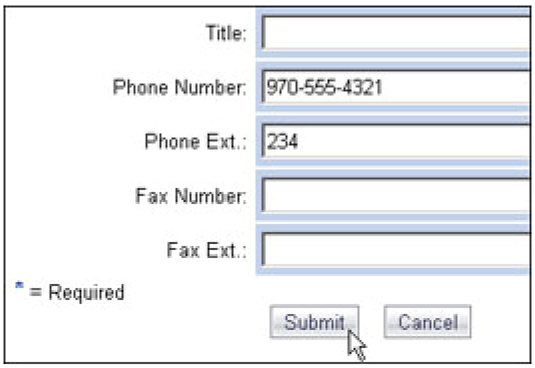
To edit a person on your contact list, click the radio button next to the record you wish to edit.

Click the **Edit** button, located above the list of names



This will display the existing contact data associated with the person's name you selected

Make the changes you wish and click **Submit** when you are finished.



You will return to the entity persons list.

Delete an entity

To Delete an entity, you must first perform a search to find the entity you wish to remove.

Once the entity is displayed in the search results, select the radio button next to the entity's name.

Use the drop-down box located above the list of entities and select **Delete**.

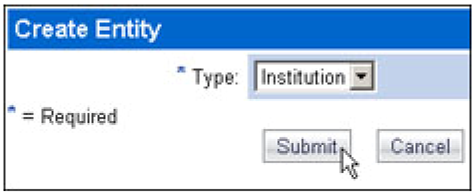
A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the entity and return to the updated list, or click **Cancel** to return to the list of entities without deleting.

Create a new entity

To Create an entity, click the **Create** button located on the far right of the main "Entity Management" page.

Use the drop-down box to select the type of entity you want to create. Click the **Submit** button to go on.



Enter basic entity characteristics and setup information.

**Indicates a required field.*

***Short Name**: Enter the short name of the realm that will be displayed in the VTC Admin Console.

Long Name: If you wish, enter the long name for the institution.

Institution Type: Use the drop-down box to select the Entity type.

College Level: Use the drop-down box to select the level of college if the entity is a college.

College Type: Use the drop-down box to select the type of college if the entity is a college.

HS Code: Enter the high school code in the text entry field.

NCES Code: Enter the NCES (National Center for Education Statistics) code.

IDQ Code: Enter the IDQ (Institutional Data Questionnaire) code.

Governance Type: Use the drop-down box to select whether this is a private or public entity.

Active: This field is not currently in use. (The default status is set to Active.)

Special Mailing: This is an RPS specific field that is no longer in use.

Comments: Enter any comments you may have about this entity in the text entry field.

Entity Address Information: Enter the entity's address information in the fields provided.

Click **Submit** to save your data and return to the list of entities. Your newly created entity will appear on the list of entities.

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Barcode Generate

User Role Access: Ultra User, Barcode Generator

The **Barcode Generate** feature generates the barcodes needed to track paper and pencil test and other assessments as defined.

Click **Barcode Generate** from the main menu. A dialog box will open, asking if you want to open or save the CSV (comma separated values) file.

- *You may use any CSV file editing tool such as Microsoft® Excel® to display generated CSV barcode files.*

Click **Save** to store the file and view at a later time.

Or, click **Open** to view your generated CSV file external to the VTC Console application.

> ***NOTE for Excel users**: Depending on your workstation settings, you may need to open Excel before running the utility. Excel may not open automatically.*

Be sure to save the data for later use by clicking **File** and **Save As** to save the file in CSV format.

You may also click the CSV editor's **Print** button to print the file.

Be sure to close the CSV window when you are finished with your generated Barcodes.

- To learn how to use the barcodes you have generated, please refer to the topic on *Barcode Management*.

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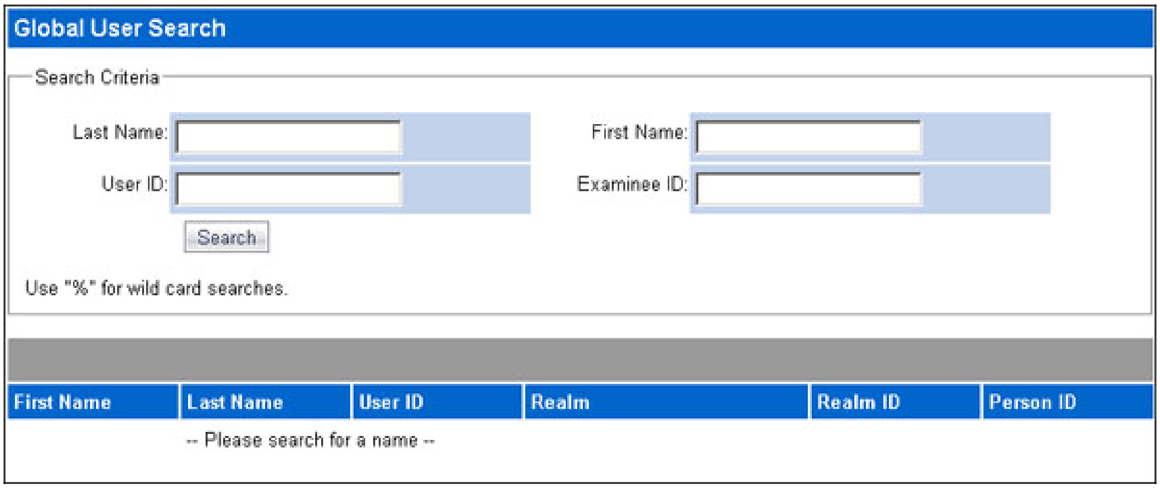
Global User Search

User Role Access: Ultra User, Help Desk

- *Global User Search is for ACT Administrative use only.*

Click **Global User Search** from the main menu to search for a user account name across all realms in the Virtual Test Center.

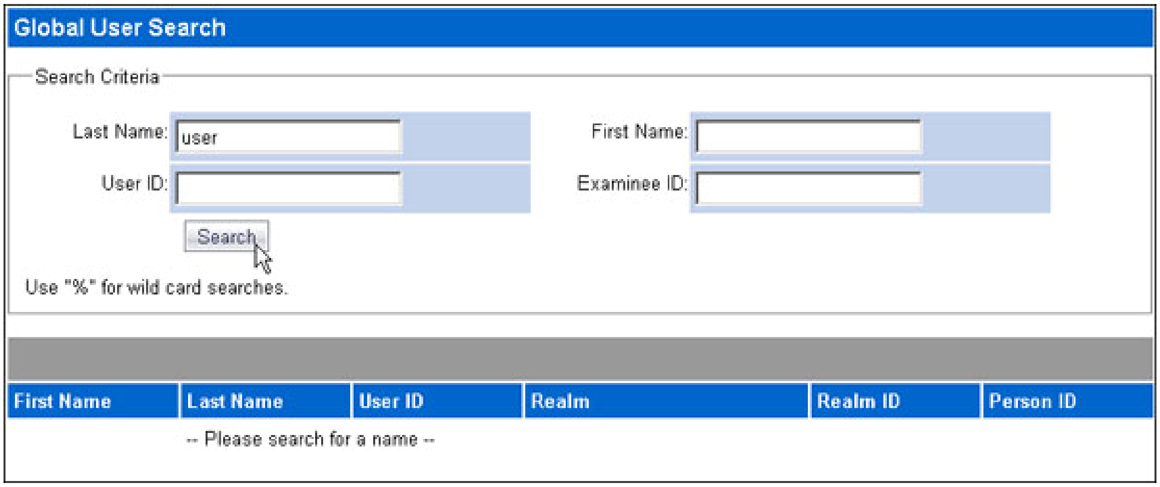


Where *User Management* is for managing and creating user accounts within a realm, the *Global User Search* will search for existing records in any realm. Only users who have been assigned the "Ultra User" or "Help Desk" user role will have access to this feature.

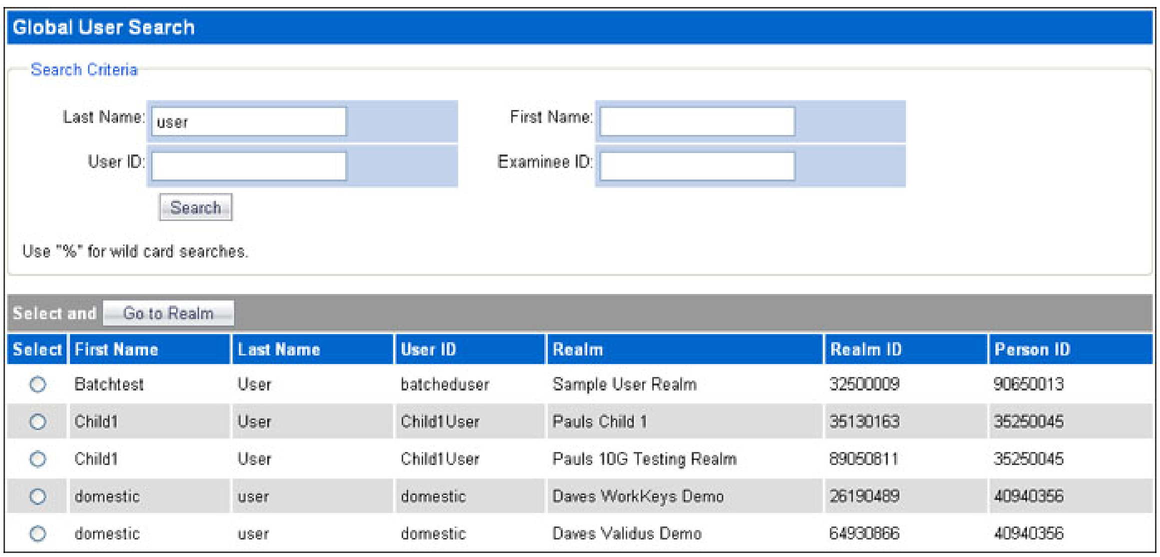
Search for a user

If you do not know the exact user you are looking for, use the % sign as a wild card character to enter any part of the last name, first name, User ID, and/or Examinee ID in the search criteria fields. (Or, you may leave the search fields blank to display all users.)

Make your criteria selections and click the **Search** button.



The search results, including the user's first and last name, user ID, and the Realm the user has been assigned to will be displayed beneath the search criteria in the lower frame. A separate record will be listed for each realm a user is associated with.



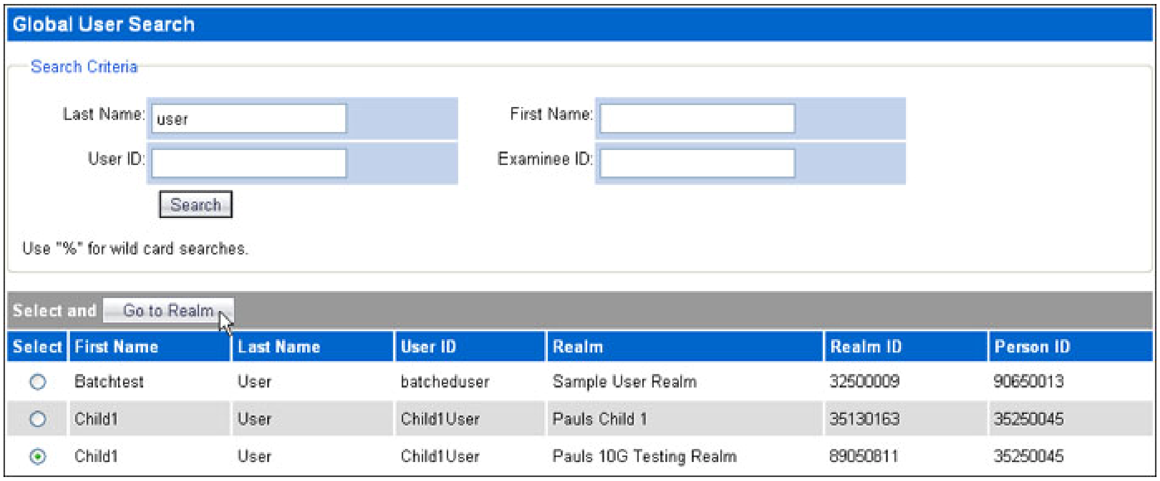
If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

- If there are too many pages of results and you are having trouble locating the user account you want, narrow your search criteria and try again.

Go to Realm

After a successful search, click the radio button next to the username of the realm you wish to access.

Click **Go to Realm**.



If you have been allowed access to that realm, you will be taken to the Home page of that realm. From there you can look up the user or other functions depending on your assigned user roles.

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Title Management

User Role Access: Ultra User, Test Author

- *Title Management is for ACT Administrative use only.*

Click **Title Management** from the main menu to create a new test title listing, or to edit, delete, and control the site access to existing test titles. If there are no titles listed, you will need to create one. The "title" signifies that individual test in all uses throughout the realm.

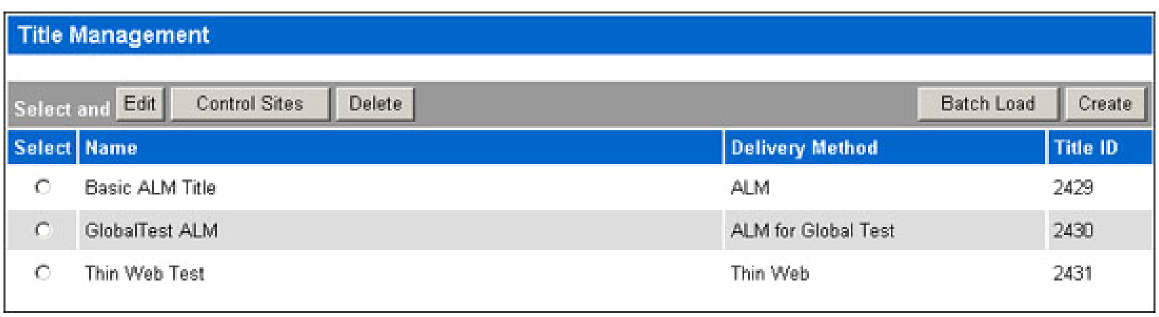
- Edit a title
  - o View/Edit uploaded survey files
- Set title control sites
- Delete a title
- Batch load a title

See also: Create a New Title

Edit a title

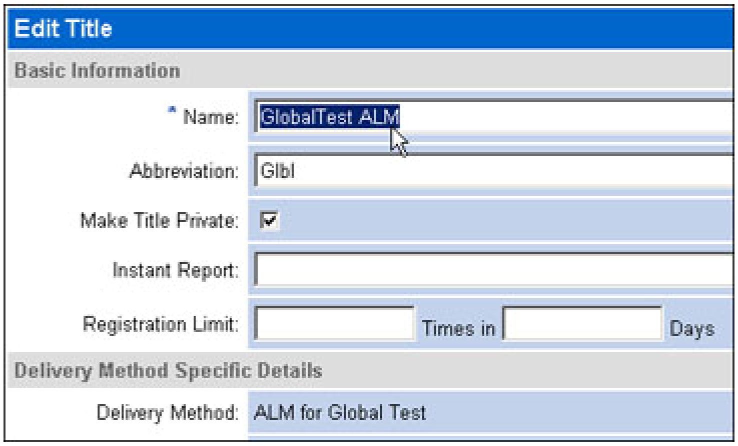
Click the **Title Management** button from the main menu. Unless you are starting a new realm, the individual titles should already be loaded.

- Information on creating titles can be found in the topic *Create a New Title*.



To edit an existing title, select the radio button next to the title you wish to modify. Click the **Edit** button located above the title list.

Edit the title's data fields as necessary.



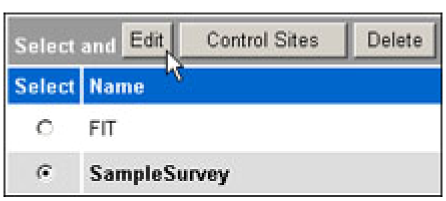
- **NOTE**: Survey titles have an additional tab of data that is described in next section, "View/Edit uploaded survey files."

When you are finished making changes, click **Submit** below the data fields to save your changes and return to the title list.

- For detailed information about each of the data fields and test types, please refer to the topic *Create a New Title*.

View/Edit uploaded survey files

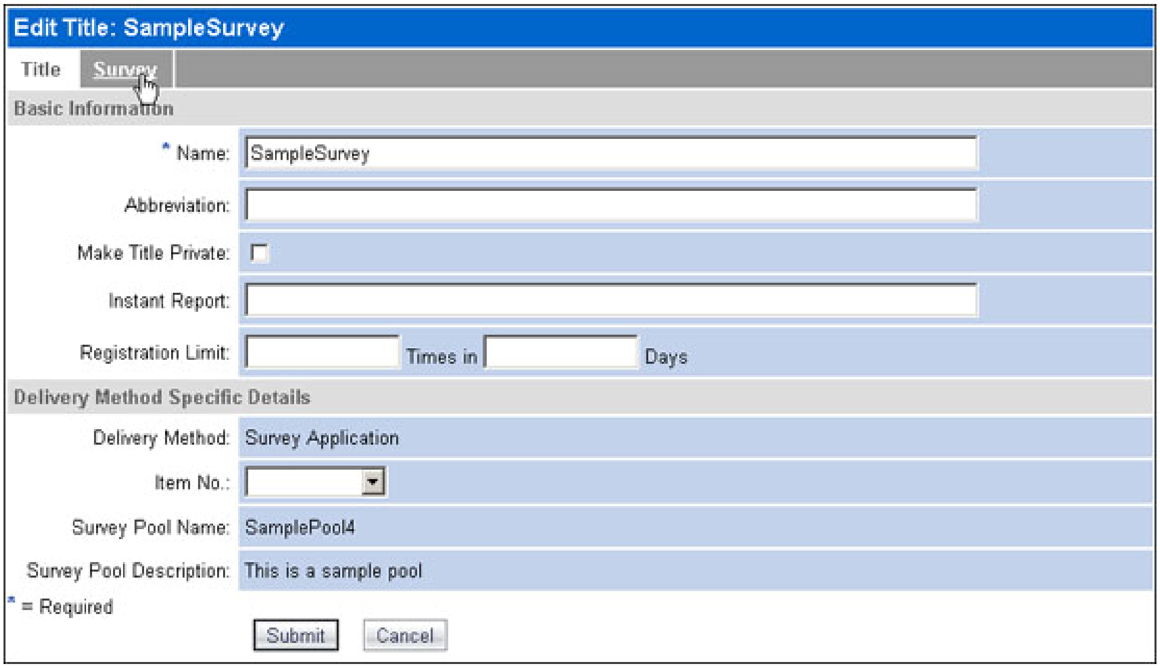
To view the survey you have uploaded and verify it works correctly, select the radio button next to the survey title you wish to view. Click the **Edit** button located above the title list.



This will open the Edit Title screen. Survey title data will be displayed in two tabs.

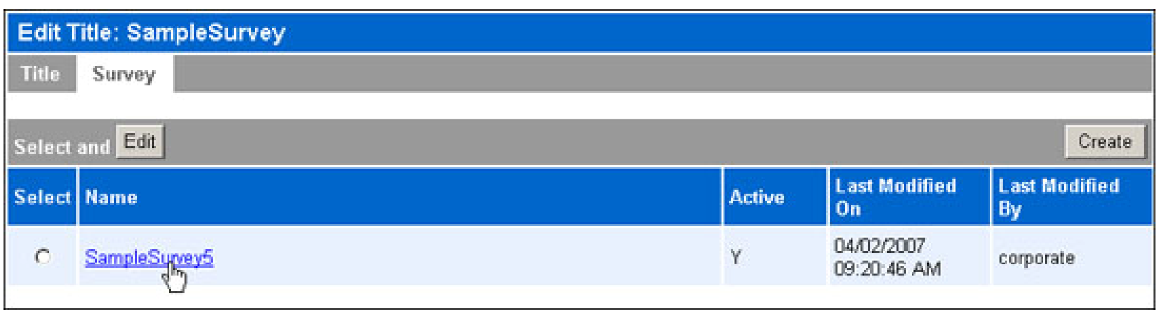
The basic information and delivery method specific details will be shown in the **Title** tab as described above in the section "Edit a Title."

To view or edit your uploaded survey file, click the **Survey** tab as shown below.

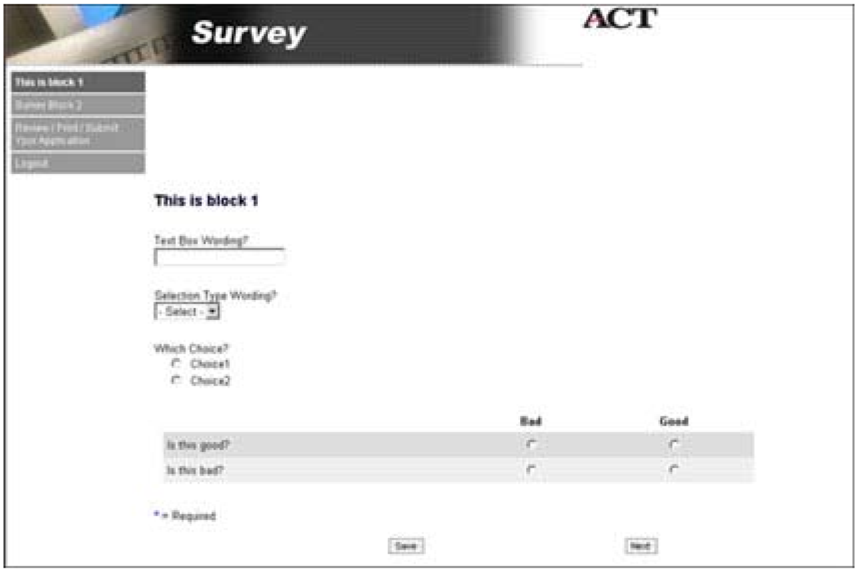


This will show data about the survey you uploaded indicating when your survey was last modified and by what User ID.

In the Survey Name column, the survey title will be displayed as a hyperlink. Click the hyperlink to launch the survey.



The survey will be displayed in a separate pop-up window, outside the VTC Admin Console. You will be able to view and interact with your survey as though you were an examinee who had been registered to take this survey.

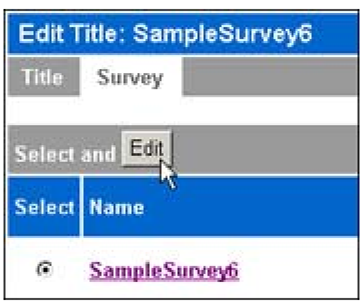


When you are finished reviewing the survey, close the survey engine window and return to the VTC Admin Console application window.

EDIT UPLOADED SURVEY FILES

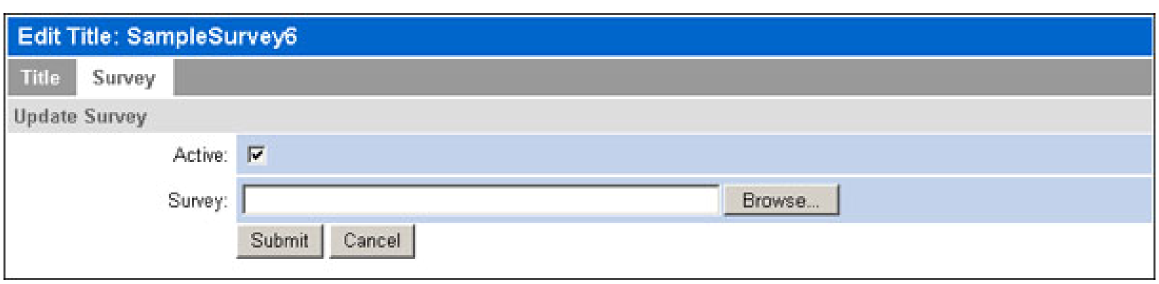
If this is NOT the survey you intended to load, click the radio button next to the survey title you wish to change.

Click the **Edit** button located above the survey list.



This will open the Edit Survey screen where you can browse for a new survey file.

A Survey file cannot use the same SurveyName tag as any other survey in the system. Each survey must be unique.

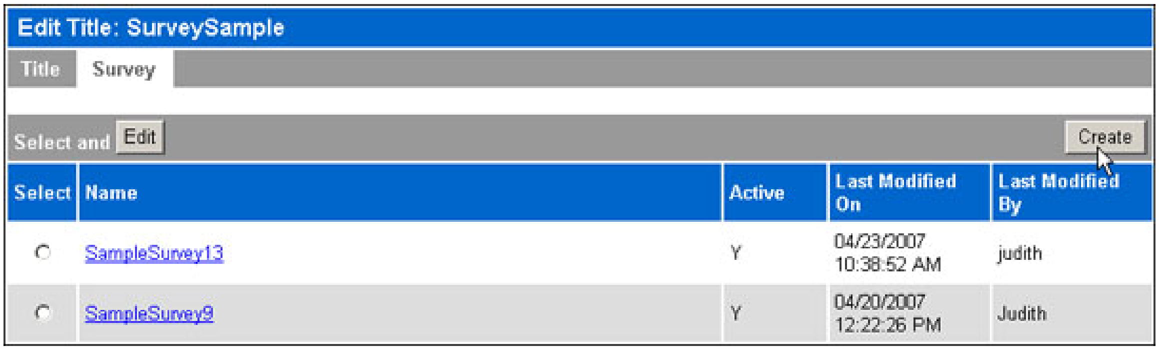


Once you have made your selections, click the **Submit** button to upload the survey.

UPLOAD MULTIPLE SURVEY FILES

You may upload multiple surveys within the same title.

While in the Survey tab as shown below, click the **Create** button and browse to select and upload additional Survey forms.



When a user is registered for the title, one of the surveys available will be administered.

Set title control sites

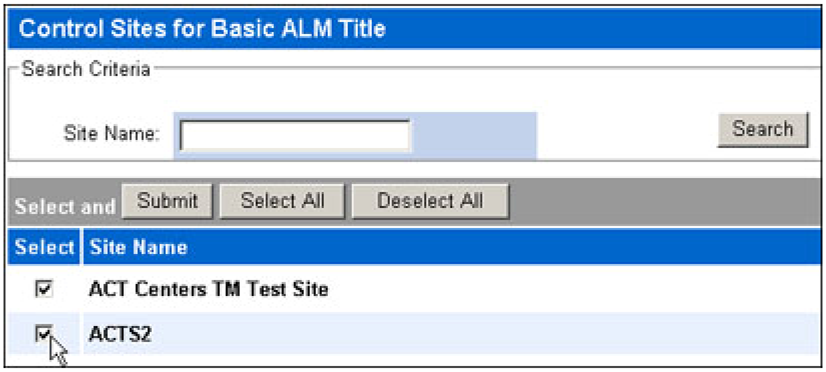
This feature is <u>*only*</u> *applicable if the assessment delivery method is ALM-based.*

If your realm administers titles using one of the ALM delivery methods, use "Set title control sites" to select which testing locations are allowed to deliver a given title. By default, if you do <u>not</u> specify test center access for an individual title, all test centers will be allowed to deliver the assessments set up for your realm.

Select the radio button next to the title name to view or modify access. Click the **Control Sites** button located above the title list.

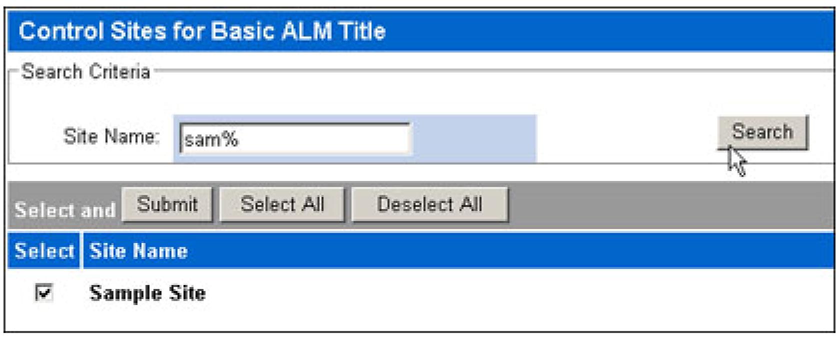
The list of sites with access to the selected title will be displayed for you.

Use the checkboxes to indicate which sites will have access to the title. Click the **Select All** and **Deselect All** buttons to help you if you wish to check or uncheck all sites simultaneously.



If you wish to search for a specific site, enter any part of the site name, using the % sign as a wild card character.

Click the **Search** button. The search results will be displayed beneath the search criteria in the lower frame.

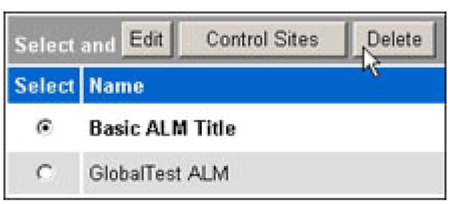


When you are finished with your selections and/or deselections, click the **Submit** button to return to the Title Management list.

Delete a title

To delete an existing title, select the radio button next to the one you wish to delete.

Click the **Delete** button located above the title list.



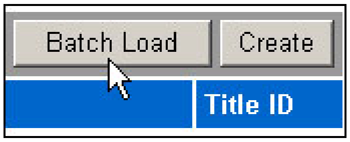
A pop-up box will display. Read the message carefully before confirming your choice.

Click **OK** to delete the selected title and return to the updated list, or click **Cancel** to return to the list without deleting.

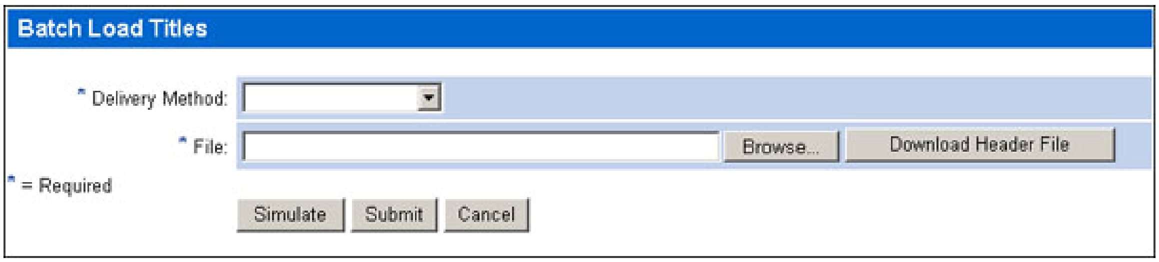
Batch load a title

VTC allows you to upload a comma-delimited data file to the system to create titles pre-populated with data.

From the Title Management page, click **Batch Load**.



This brings you to the Batch Load Titles screen as shown below.



First, you need to download a template you can use to create a title record file.

Select the **Delivery Method** from the drop-down box and click **Download Header File** to download a commented CSV (comma separated values) file. The layout of the CSV file will vary based on the chosen Delivery Method.

Click to **Save** the file to a location on your network or hard drive, or click to **Open** it using a CSV file editing tool such as Microsoft® Excel®.

- **Excel users**: see Appendix A: Handling CSV Files for more information about creating and handling CSV files in Excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	TITLE_NAI	ABBREVIA	PRIVATE	TOTAL_TI	PAD_TIME	RED_ZON	LAUNCH_I	PUBLISHE	DDS_COD	REQ_ID	TOOLS	TESTING_	RESOLUT	KIOSK_M	FIN
2															
3															
4															
5	Comments: (Please do not include comments in the Batch load file)														
6															
7	--														
8	PRIVATE (Allowed Values):														
9	TRUE														
10	FALSE														
11															
12	--														
13	RESOLUTION (Allowed Values):														
14	1														
15	2														
16															
17	--														
18	KIOSK_MODE_FLAG (Allowed Values):														
19	TRUE														
20	FALSE														
21															
22	--														
23	FINGER_PRINT_FLAG (Allowed Values):														
24	TRUE														
25	FALSE														
26															
27	--														
28	FP_ALLOW_TEST_FLAG (Allowed Values):														
29	TRUE														
30	FALSE														
31															
32															

- *You may use any CSV file editor to display and generate CSV header files.*

Use the comments as shown in the Excel file example above to help you fill out the fields with allowable values for your Batch Titles.

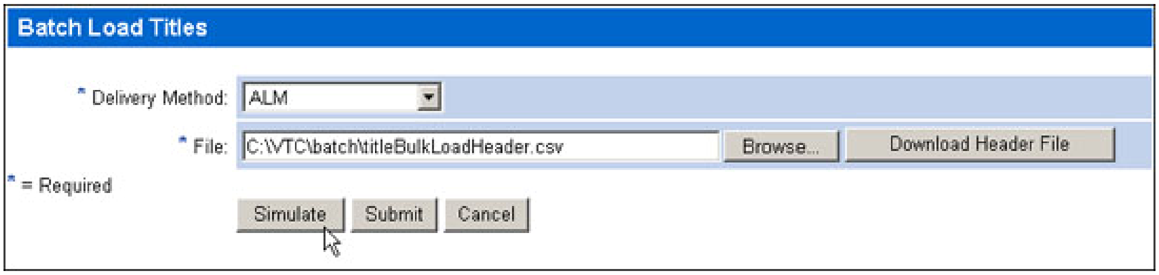
<u>You must delete the comments</u> before you save your data and upload your file to VTC.

	A	B	C	D	E	F	G	H	I	J
1	TITLE_NAI	ABBREVIA	PRIVATE	TOTAL_TI	PAD_TIME	RED_ZON	LAUNCH_I	PUBLISHE	DDS_COD	REQ_ID
2	BatchTitle	Batched	FALSE	60	5	3	http://www	46486	123456	ID required

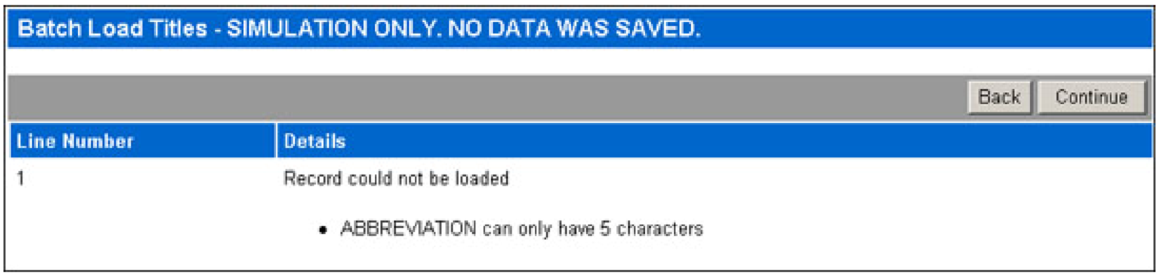
When you are ready to upload the file you created, return to the **Batch Load Titles** screen.

Click **Browse** and select the location of the CSV file you wish to upload.

Once you have selected the file to upload, it is recommended that you click the **Simulate** button to test the data format of your file, before uploading any real data.



The data you plan to import will be displayed on-screen along with a message that NO DATA WAS SAVED during the simulation.

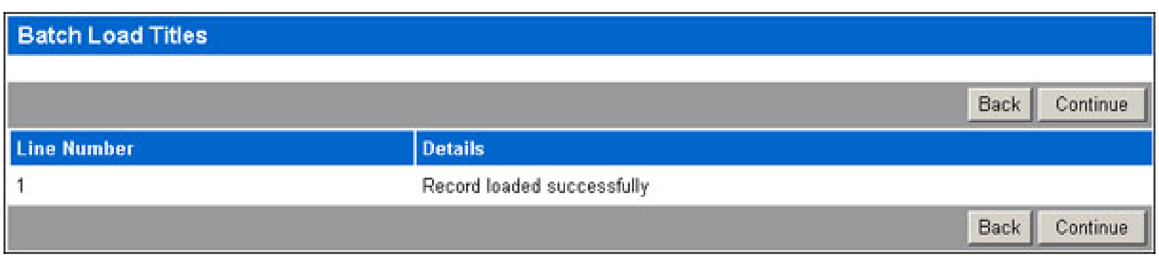


- If there are any errors, the line number title containing the error will be shown. If the data is invalid, click **Back**, correct the errors in the data file, and simulate the batch upload again.

If the data is valid, click the **Continue** button and begin the **Batch Load** process again.

After you select your CSV file to upload, do not click "Simulate." Instead, click the **Submit** button to upload the titles to the system.

The data you imported will be displayed on-screen.



Click **Continue** to return to the Title Management main page where your title will be displayed.

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Create a New Title

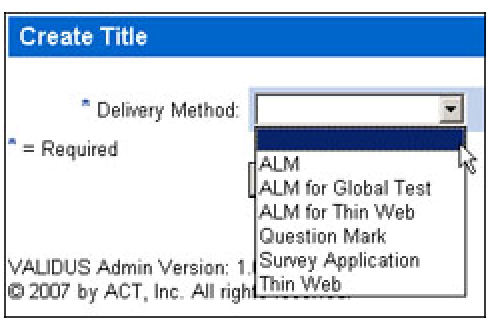
This section describes how to create a new title and also describes in detail the fields and functionality of each tab and title type.

Create a new title

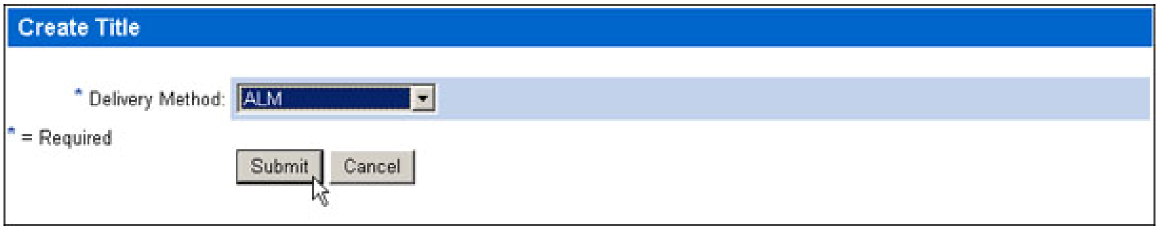
Click **Title Management** from the main menu.

Click the **Create** button located on the far right of the main Title Management page.

First, use the drop-down box to select the **Delivery Method**. The Delivery Method is the program or application that will deliver the test to the examinee. (Examinees will never log into the VTC Admin Console for any reason.) For thin-web hosted applications, choose ThinWeb; for distance learning or third-party hosted applications, choose ALM.



Click the **Submit** button when you have made your selection.



You will be asked to enter data that corresponds to the delivery method you chose. (See the examples in each category below.)

The basic information items are used in all delivery methods. The data fields specific to each delivery method are listed below.

Basic Information

**Indicates a required field.*

***Name**: Enter the name of the title.

Abbreviation: Enter the abbreviation for the title.

Make Title Private: All realms within the associated program have access to the same list of titles unless the title is marked for private use within a single realm. Use the checkbox to indicate whether or not you want the title to be public or private.

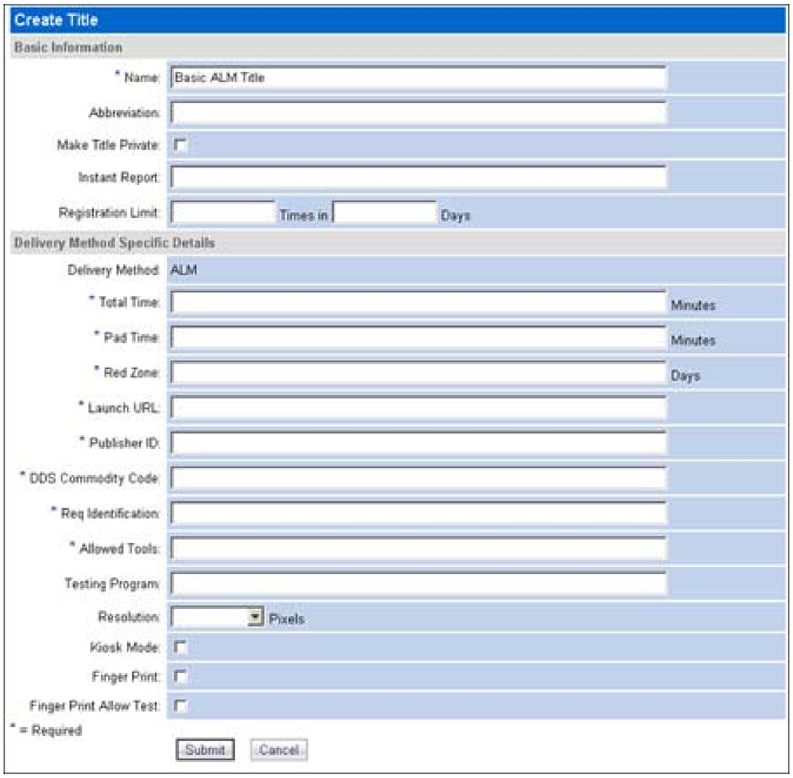
Instant Report: This field points to the Jasper report definition file for the instant report that is generated for this particular test title. This information will be filled in and/or modified by ACT's IT staff.

Registration Limit: Use the two text entry fields to enter the number of times in days that an examinee can register for the title.

Delivery Method-Specific Details

- ALM
- ALM for Global Test
- ALM for ThinWeb
- Question Mark
- Survey Application
- ThinWeb

ALM – THIRD-PARTY TESTS LAUNCHED THROUGH THE ALM (ACT CENTERS)



** Indicates a required field.*

***Total Time** (in Minutes): Enter the number of minutes for the total test time allowed.

***Pad Time** (in Minutes): Enter the number of minutes to allow for any additional preparation time.

***Red Zone** (in Days): Enter the number of days immediately prior to the test when users are no longer allowed to register, (usually 2 days).

***Launch URL**: Launch third party tests identified by a client-specific URL. Enter the URL.

***Publisher ID**: The code designating courseware or test titles that are used by ACT staff. For test titles in VTC, enter 46846.

***DDS Commodity Code**: This is the 6-digit budget code used by the ACT Finance Department. When payments are made for proctoring exams, the expense is recorded under this code.

***Req Identification**: Enter the form of identification testers are required to present during test check-in.

***Allowed Tools**: Enter the items examinees may use during testing, (e.g., calculator, etc.).

Testing Program: Used only in conjunction with ALM.

Resolution: Select the resolution size of the test launch window.

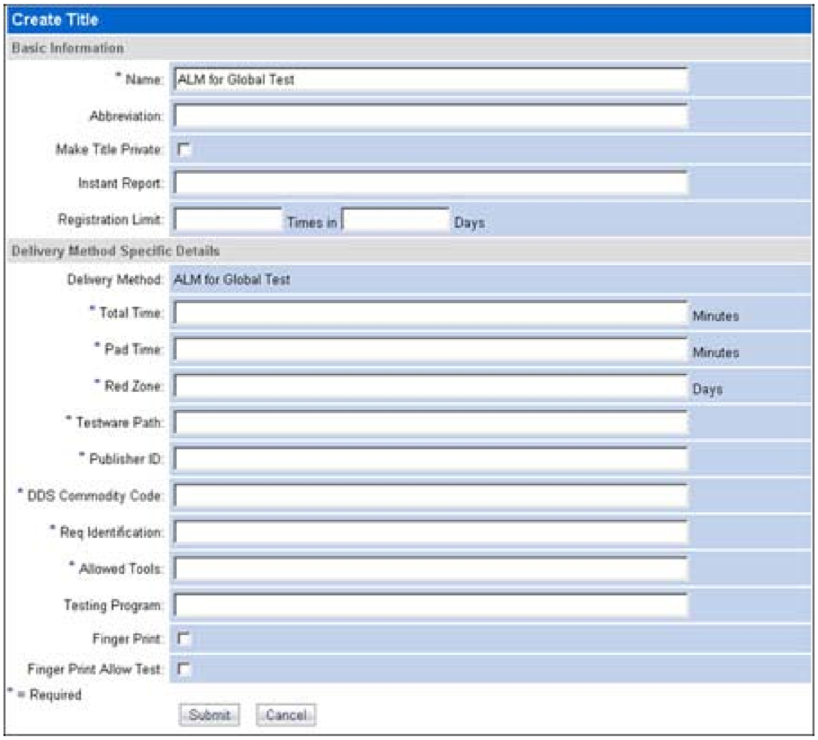
Kiosk Mode: Tests will be launched in a browser window without the navigation buttons.

Finger Print: Used only in conjunction with ALM.

Finger Print Allow Test: Used only in conjunction with ALM.

When you are finished entering data, click the **Submit** button to return to the Title Management list where your new title will be shown.

ALM for Global Test – Global Tests launched through the ALM (ACT Centers)



** Indicates a required field.*

***Total Time** (in Minutes): Enter the number of minutes for the total test time allowed.

***Pad Time** (in Minutes): Enter the number of minutes to allow for any additional preparation time.

***Red Zone** (in Days): Enter the number of days immediately prior to the test when users are no longer allowed to register. (usually 2 days)

***Testware Path**: Launch Global Test tests, identified by the client-specific Testware Path URL. Enter the URL.

***Publisher ID**: The code designating courseware or test titles that is used by ACT staff. For test titles in VTC, enter 46846.

***DDS Commodity Code**: This is the 6-digit budget code used by the ACT Finance Department. When payments are made for proctoring exams, the expense is recorded under this code.

***Req Identification**: Enter the form of identification testers are required to present during test check-in.

***Allowed Tools**: Enter the items examinees may use during testing, (e.g., calculator, etc.).

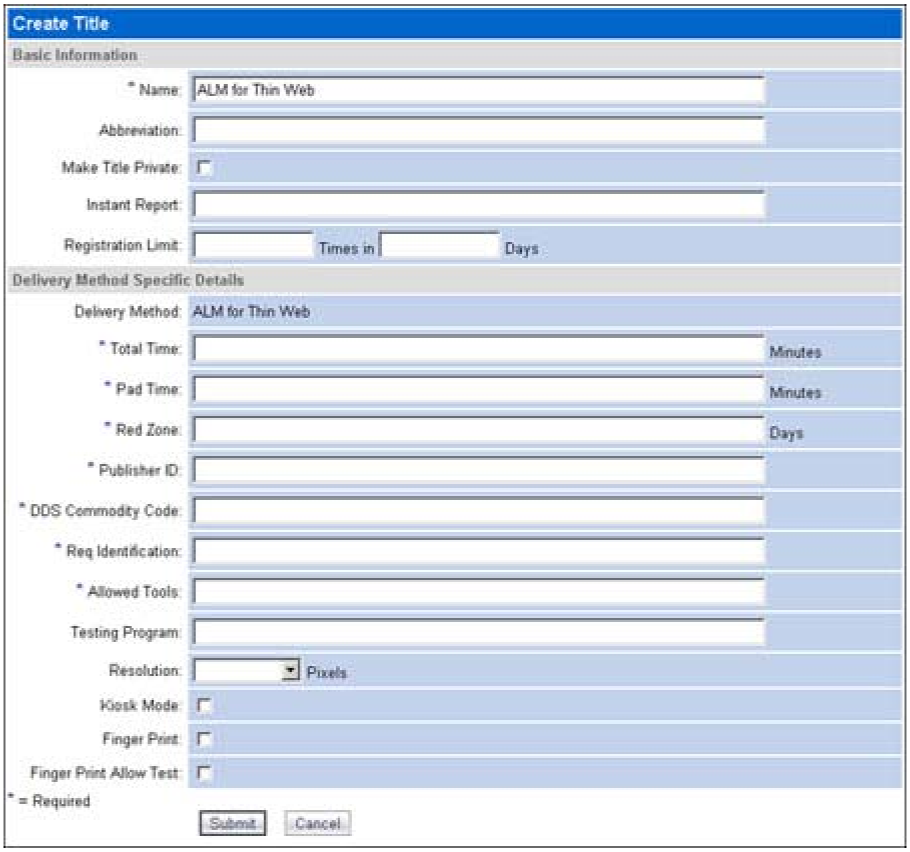
Testing Program: Used only in conjunction with ALM.

Finger Print: Used only in conjunction with ALM.

Finger Print Allow Test: Used only in conjunction with ALM.

When you are finished entering data, click the **Submit** button to return to the Title Management list where your new title will be shown.

ALM FOR THINWEB – THINWEB TESTS LAUNCHED THROUGH THE ALM (ACT CENTERS)



** Indicates a required field.*

***Total Time** (in Minutes): Enter the number of minutes for the total test time allowed.

***Pad Time** (in Minutes): Enter the number of minutes to allow for any additional preparation time.

***Red Zone** (in Days): Enter the number of days immediately prior to the test when users are no longer allowed to register. (usually 2 days)

***Publisher ID**: The code designating courseware or test titles that is used by ACT staff. For test titles in VTC, enter 46846.

***DDS Commodity Code**: This is the 6-digit budget code used by the ACT Finance Department. When payments are made for proctoring exams, the expense is recorded under this code.

***Req Identification**: Enter the form of identification testers are required to present during test check-in.

***Allowed Tools**: Enter the items examinees may use during testing, (e.g., calculator, etc.).

Testing Program: Used only in conjunction with ALM.

Resolution: Select the resolution size of the test launch window.

Kiosk Mode: Tests will be launched in a browser window without the navigation buttons.

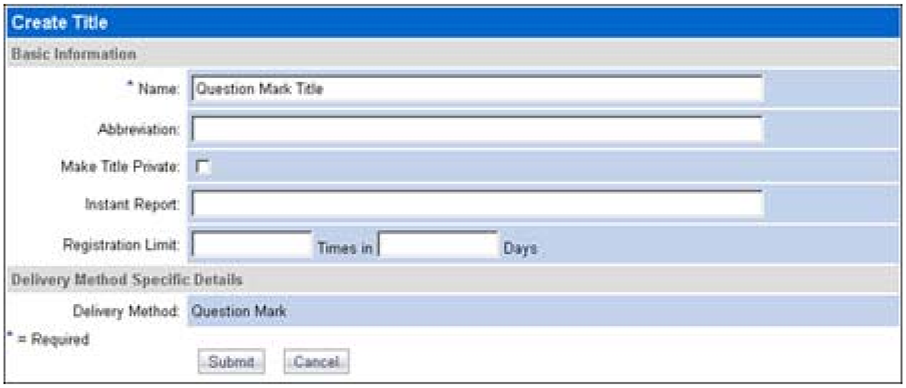
Finger Print: Used only in conjunction with ALM.

Finger Print Allow Test: Used only in conjunction with ALM.

When you are finished entering data, click the **Submit** button to return to the Title Management list where your new title will be shown.

QUESTION MARK

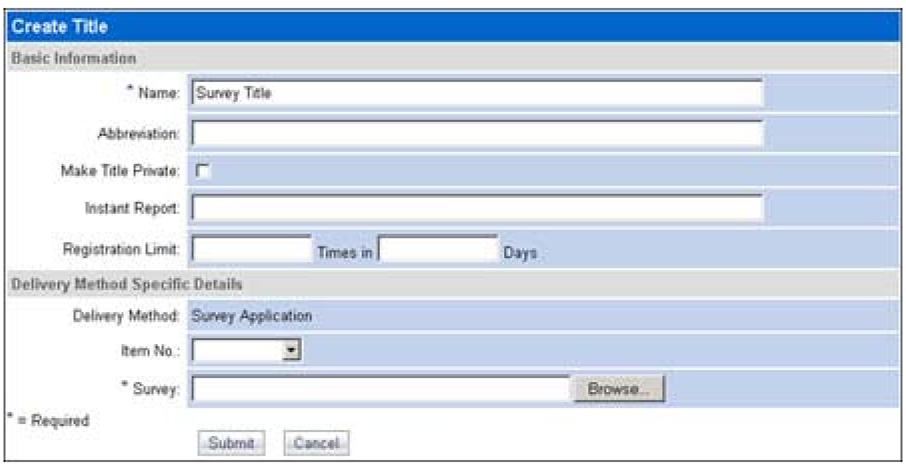
Only the basic information fields are needed to complete this title.



** Indicates a required field.*

When you are finished entering data, click the **Submit** button to return to the Title Management list where your new title will be shown.

SURVEY APPLICATION – SURVEY FORMS LAUNCHED THROUGH RSP USING THE SURVEY ENGINE



** Indicates a required field.*

Item No.: Use the drop-down box to select the item number which is used for billing purposes.

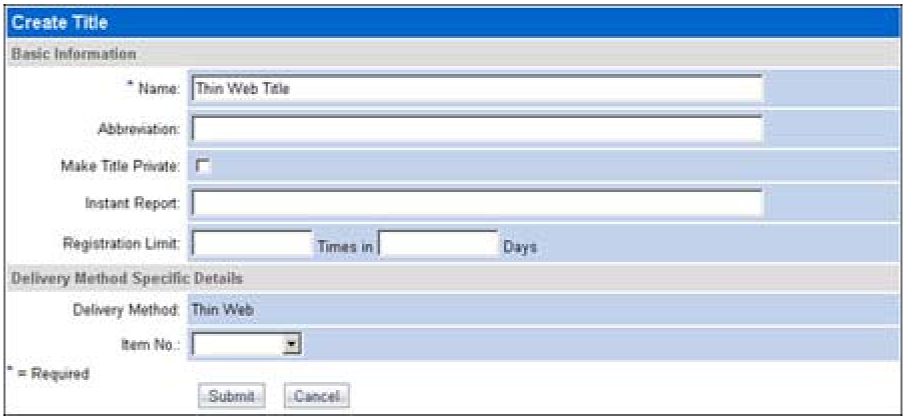
***Survey**: Load the .xml survey file created by the RPS (Recognition Programs Services). Click the **Browse** button and locate the file you wish to upload. Highlight the file name and click **Open**. Or, double-click on the file's name to populate the "Survey" field.

A Survey file cannot use the same SurveyName tag as any other survey in the system. Each survey must be unique.

When you are finished entering data, click the **Submit** button to return to the Title Management list where your new title will be shown.

- If you want to know how to verify that the survey you uploaded is the correct file, please refer to the section on how to "View/Edit uploaded survey files" in the topic *Title Management*.
- To upload and pre-populate an applicant's survey answers after uploading a survey title, please see the section on "Load Applicant Data" in *Assessment Management*.

THINWEB – TESTS LAUNCHED THROUGH RSP USING THE VTC THINWEB TEST ENGINE



** Indicates a required field.*

Item No.: Use the drop-down box to select the item number which is used for billing purposes.

When you are finished entering data, click the **Submit** button to return to the Title Management page where your new title will be shown.

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Reports

User Role Access: Ultra User, Report Manager, Financial Charge Back Reports, Finance Reporting, FSOT Reporter, Report Invoice Admin, Report Invoice Remote, Report Invoice, User Manager (for Export Examinees)

- *Based on the user's assigned role, access to the various report types may be limited.*
- *You cannot assign the Report Manager Role by itself for access to Reports. At least one report role needs to be assigned in conjunction with the Report Manager role to activate access to the report.*
- *The Finance Reporting Role allows access to both the Financial Charge Back and Financial Order Reconciliation Report.*

Reports are defined by ACT IT staff.

This topic applies to the launching and searching for ACT Invoice, Export Examinees, Financial Order Reconciliation, and Financial Charge Back report files. (FSOT Extract is a separate report type and is not documented.)

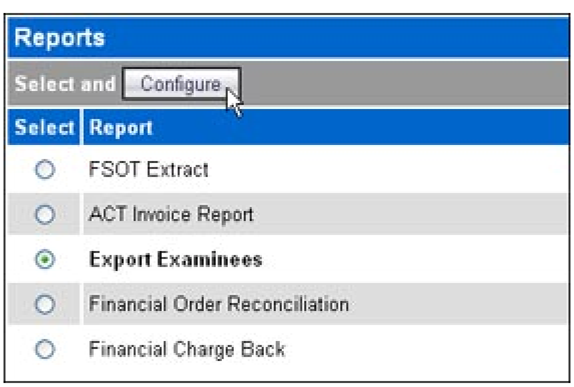
- Generating a report
- Search for report files
- Download and view report files
- Delete report files

Generating a report

Click **Reports** from the main menu. If report types have been set up for your realm and you have been allowed access to them, they will be listed for you.

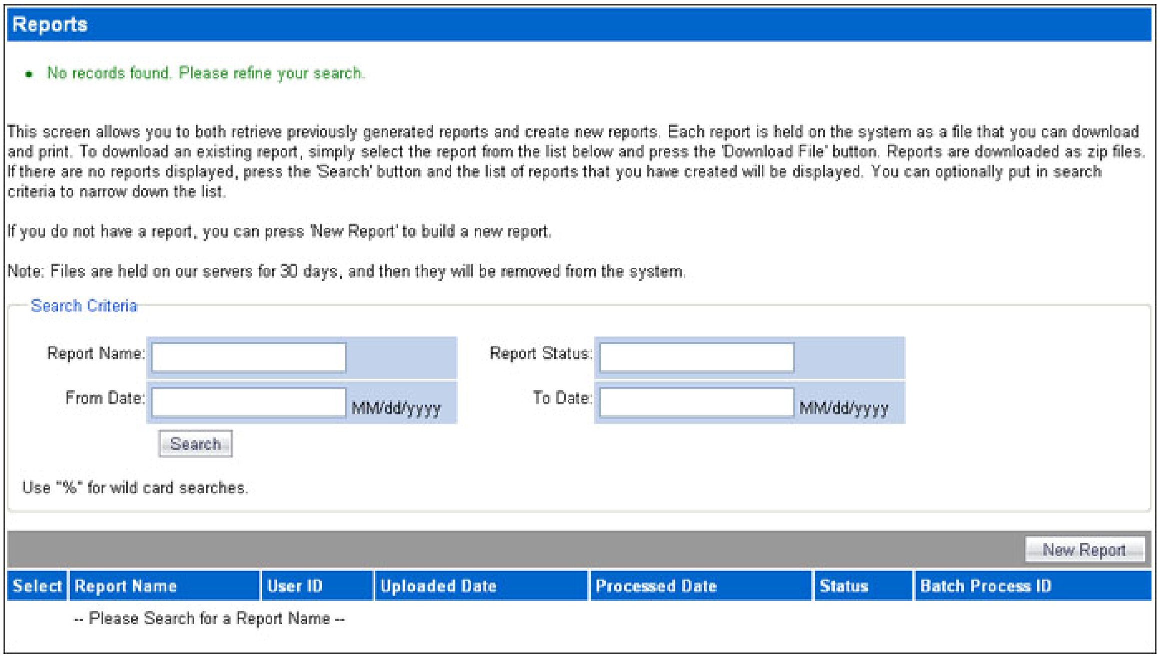
Click the radio button next to the report type you wish to launch.

Click **Configure** to begin.



Report files that you have previously generated are stored for 30 days and will be displayed.

Some reports may require a specific user role in order to see reports other users have generated. If no reports have been generated, or you cannot view reports others have generated, no files will be displayed.



To generate your report, please see the individual report topic page:

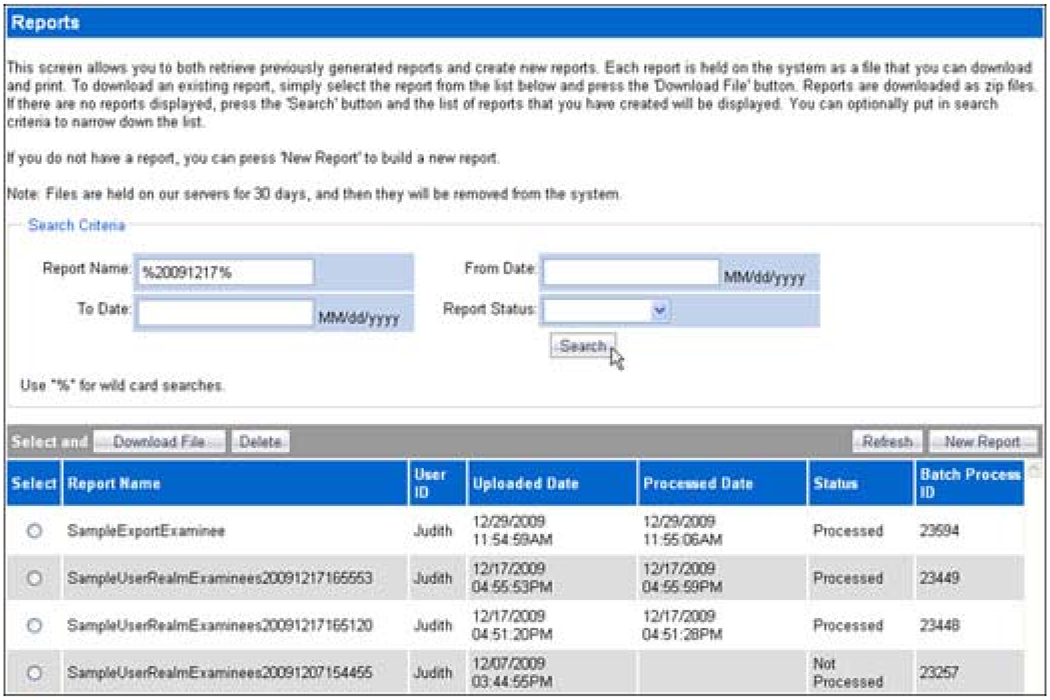
- ACT Invoice Report
- Export Examinees
- Financial Order Reconciliation (for internal ACT use only)
- Financial Charge Back (for internal ACT use only)

Search for report files

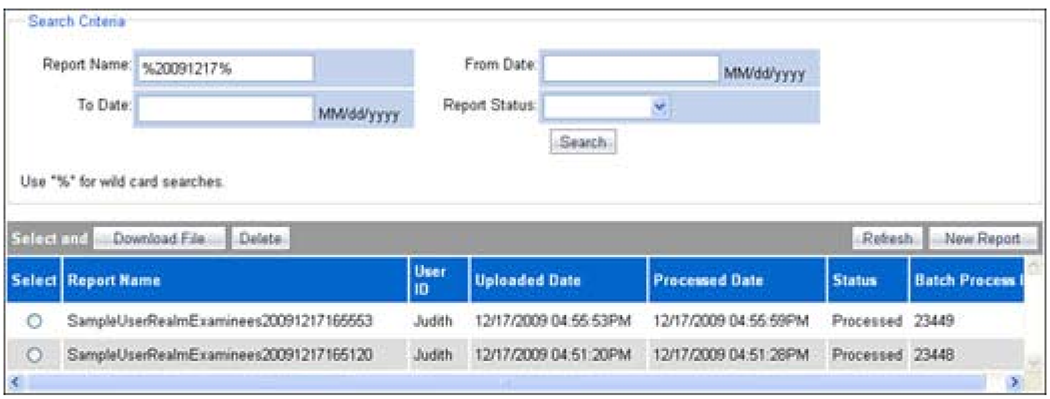
All reports you have access to view will display automatically. If you do not know the exact report file you are looking for or if there are a large number of files, use the search criteria to narrow the list and find your report.

Enter the Report Name and/or Status. Use the % sign as a wild card character to enter any part of the report name or report status. You may also enter a date range to display report files generated within that range.

Make your criteria selections and click the **Search** button.



The search results will be displayed beneath the search criteria in the lower frame.



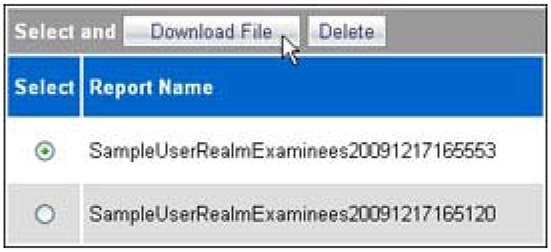
If there is more than one page of results, use the navigational tool buttons, **First**, **Previous**, **Next**, and **Last** to help you review the pages of results.

- If there are too many pages of results and you are having trouble locating the report you want, narrow your search criteria and try again.

Download and view report files

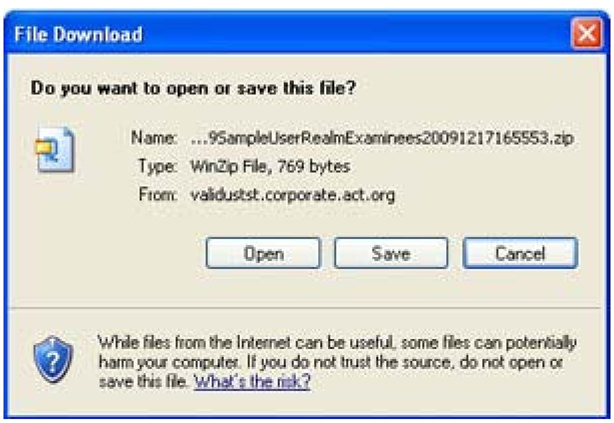
Once a file has been processed, you may download it to view, print, and/or save it to your workstation or network.

Select the radio button next to the file you wish to download. Click **Download File**.



- If you are waiting for a file to process, you may click the **Refresh** button.

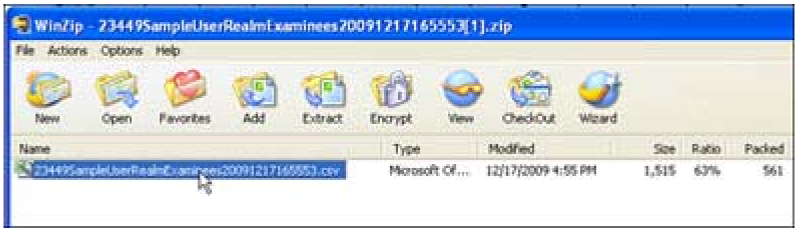
The File Download dialog box will pop up, asking you whether you want to Open the file or Save the file to a location of your choosing.



To open and view: Click **Open** to view the zipfile name.

Double-click the filename to view the file (or open it) using a CSV file editing tool such as Microsoft® Excel®.

- **Excel users**: see Appendix A: Handling CSV Files for more information about creating and handling CSV files in Excel.



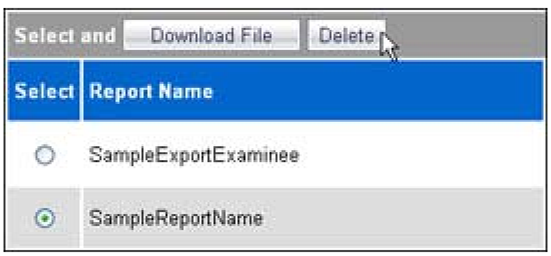
Use the CSV application to print and/or save the data to a location of your choosing. Close the CSV window when you are finished to return to the VTC Admin application.

To save: Click **Save** and browse to a location of your choosing. Rename the file if you wish.

Use the CSV editor of your choice to open and view the file data.

Delete report files

Select the radio button next to the file you wish to delete. Click **Delete**.



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ACT Invoice Report

User Role Access: Ultra User, Report Manager, Report Invoice, Report Invoice Admin, Report Invoice Remote

- *The Report Invoice, Report Invoice Remote, and/or Report Invoice Admin roles must be assigned in conjunction with the Report Manager role for the report to be activated.*

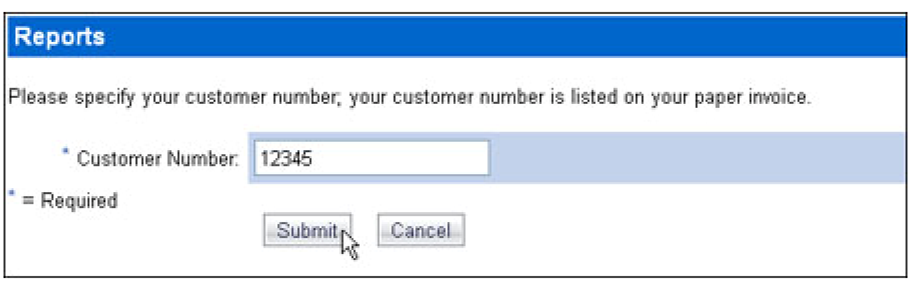
NOTE: You must have valid customer and invoice numbers to generate these reports. The invoice and customer numbers are printed on the paper invoice that the client receives. Depending on your user role, you may only have access to the customer numbers that are in the realm you are currently viewing.

Create new invoice report

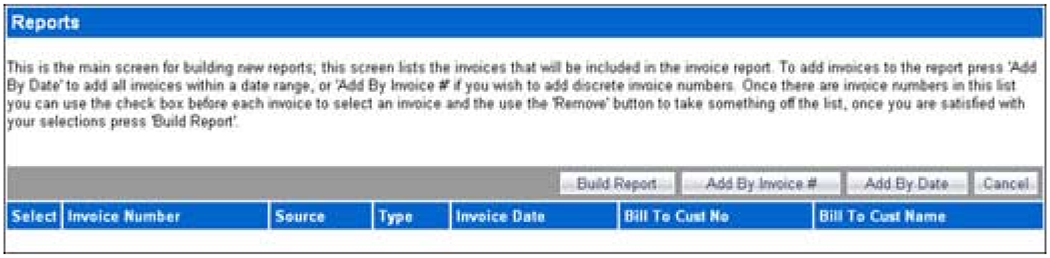
If any files are already in the system and/or are being processed, they will be displayed for you on the reports page.

Click **New Report** to build an ACT Invoice Report file.

Enter the customer number. Click **Submit** to go on.



Once your customer number has been validated, you will be asked to add the invoice numbers to your report file.

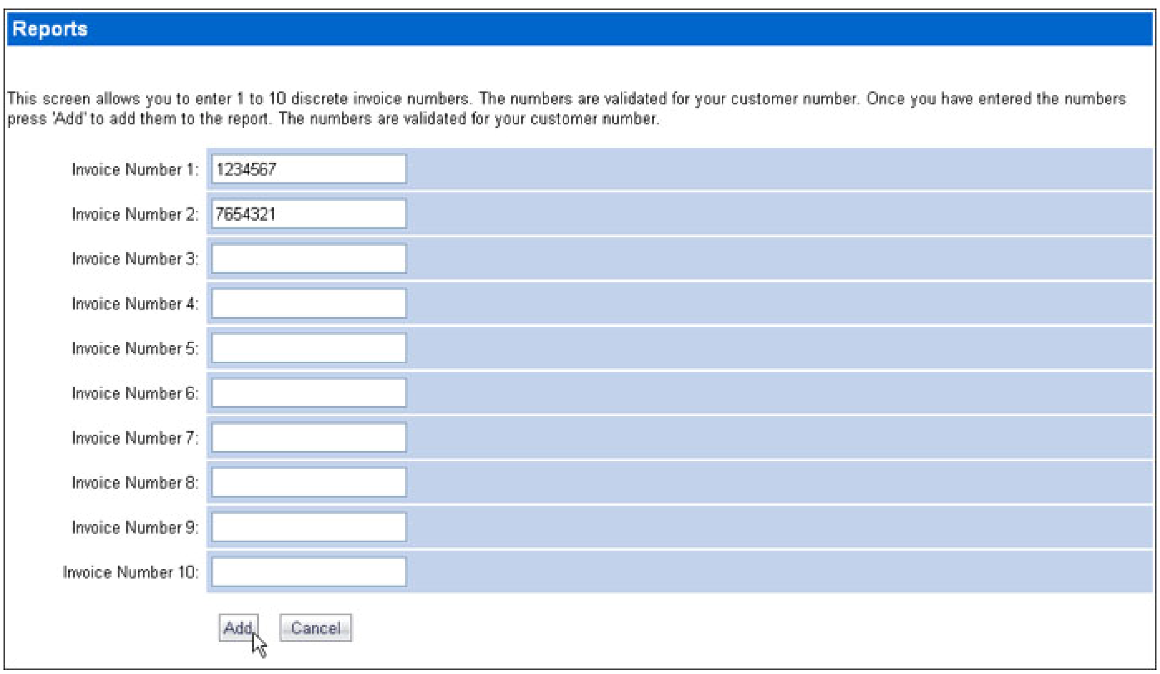


There are two methods of adding invoice numbers. You can use one or both methods in combination to find the invoices you want.

ADD BY INVOICE

If you know the exact invoice number or numbers you want to add to the report file, click **Add by Invoice #**.

Enter the specific invoice numbers you wanted, up to 10 invoices. Click **Add** to add them to the report file selection list.

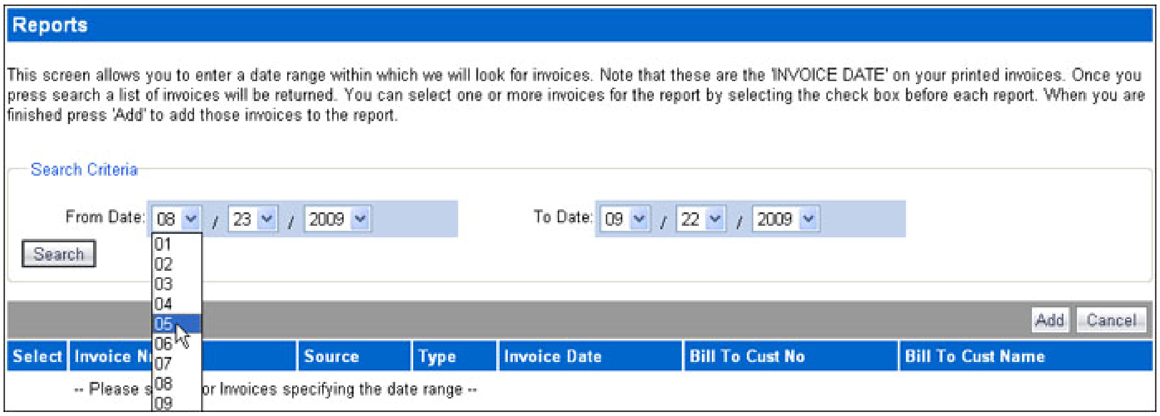


This will return you to the reports screen where your invoice selections will appear on the list.

ADD BY DATE

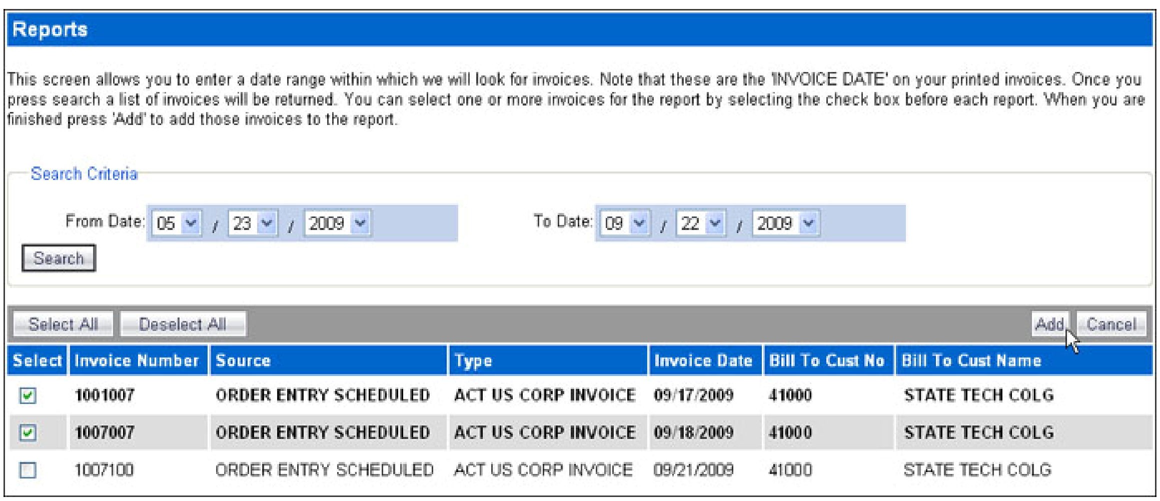
If you want to search for invoice numbers by selecting a date range, click **Add By Date**.

Use the drop-down boxes to select the date range for the invoice date. Click **Search**.



The list of returns will appear below your search criteria.

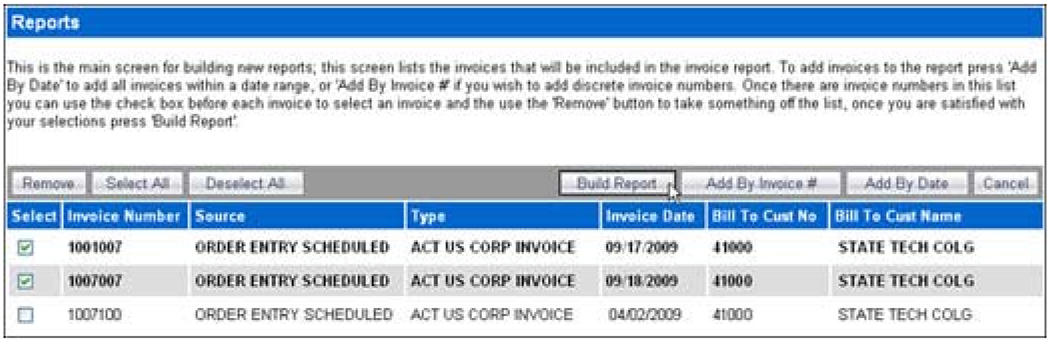
Mark the checkbox next to the selected entries you wanted and click **Add** to add them to the report file selection list.



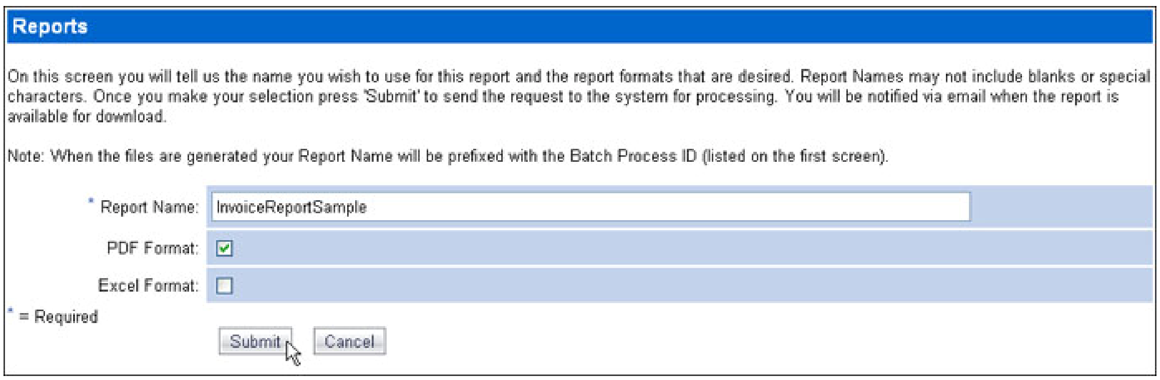
This will return you to the reports screen where your invoice selections will appear on the list.

Build Report

Once your invoices have been placed on the selection list, you are ready to build a report file. Click the checkbox next to any of the selected invoices you want to include in your file and click **Build Report**.



You will be asked to name your file and select the file format(s). Click **Submit**.



This will return you to the Reports page where your file will be listed.

When your file has been processed, you may download and view the results.

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Export Examinees

User Role Access: Ultra User, Report Manager, User Manager

- *The User Manager role must be assigned in conjunction with the Report Manager role for the report to be activated.*

You may use any CSV file editing tool such as Microsoft® Excel® to display and generate CSV user files.

Administrators may wish to export examinee data to an external program. The Export Examinees report will select export data from the list of individuals registered in a realm who have been granted the role of "Examinee." You can narrow the list by date range or by Assessment and date range.

Export Examinees will export the following data from the examinee user records:

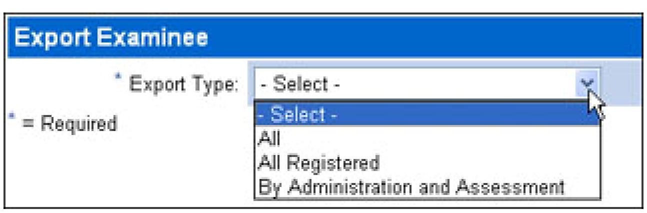
- All standard and user-defined attribute demographic data (e.g., address, date of birth, etc.)
- Examinee/Candidate identifying data (e.g. username, password, first name, last name, email address).
- Examinee/Candidate test registration information (e.g., registration IDs, registration title(s), test launch dates, and status).
- **NOTE**: If an examinee has a role other than Examinee in yours or any other realm, the record will not be included in an export file.

Create new report

If any files are already in the system and/or are being processed, they will be displayed for you on the reports page.

Click **New Report** to build a new export.

Use the Export Type drop-down box to select whether to export **All** candidates, **All Registered** candidates, or select candidates **By Administration and Assessment** they have been registered.

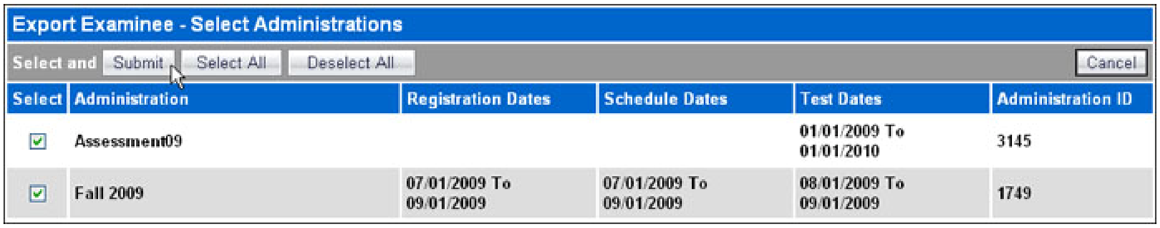


Click **Submit**.

If you selected **All**, or **All Registered**, skip the assessment selection steps until Select Date Range.

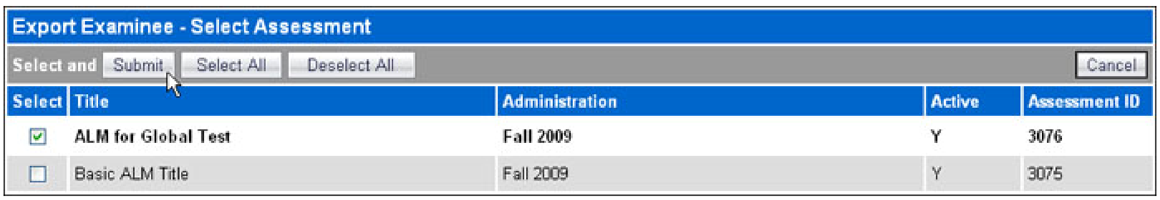
If you selected **By Administration and Assessment**, a list of your Administrations will be shown. Click the checkbox next to the administration(s) containing the assessment title or titles you want to use.

Click **Submit**.



The assessment(s) in the test administration you chose will be displayed. Click the checkbox next to the assessment(s) that is linked to the user's data you want to export.

Click **Submit**.



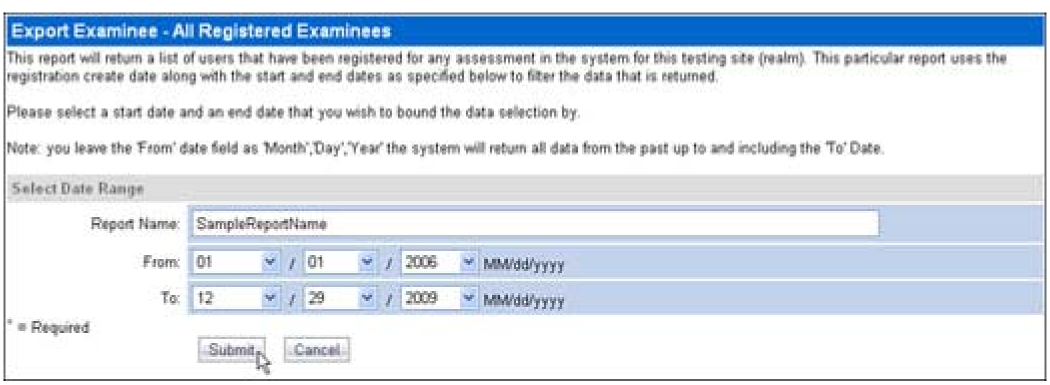
Finally, **Select Date Range**.

If you clicked to export **All** records, select the start date and end date the user record was created to narrow down the list of user records.

If you clicked to export **All Registered** or **By Administration and Assessments**, select the start date and end date the registration was created to narrow down the list of registered examinees.

- Start dates times are automatically set at 00:00 for the day entered. End dates are set at 24:00 unless the current date is entered. Then, current time is used.
- The default state for the end-date field is the current day's date.
- Leave the start date blank if you wish to return all records in the category.

Click **Submit**.



This will return you to the Reports page where your file will be listed.

When your file has been processed, you may download and view the results.

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Financial Order Reconciliation

(For internal ACT use only)

User Role Access: Ultra User, Finance Reporting

- *The Finance Reporting Role allows access to both the Financial Charge Back and Financial Order Reconciliation Report.*

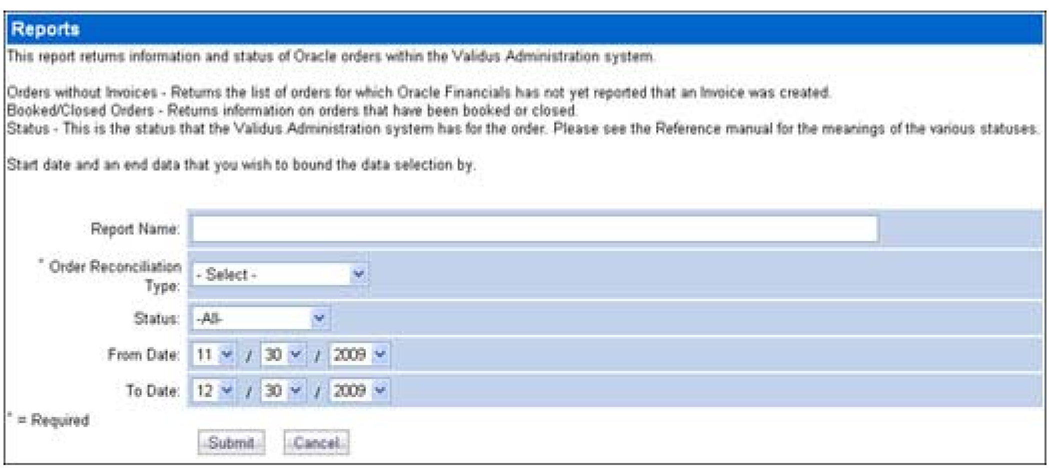
This reports shows the status and detail of Oracle orders in VTC Admin for the realm you are logged into. You can draw reports based on order type, status, and date range.

Create new report

If any files are already in the system and/or are being processed, they will be displayed for you on the reports page.

Click **New Report** to build a new Financial Order Reconciliation report.

Set your parameters for building your Reconciliation report.



**Indicates a required field.*

Report name: The system will generate a name for you. Otherwise, enter a name for your report. It should be something you will be able to identify later.

*** Order Reconciliation Type**: Use the drop-down box to select **Orders without Invoice**, or **Not Booked/Not Closed** orders.

Status: Use the drop-down box to select the status from this optional field.

- Order has been loaded to a batch file to be sent to Oracle
- Order is in the process of being created in VTC
- Oracle Financial System has booked an Order
- Oracle Financial System has closed an Order
- Oracle Financial System has created an Order
- An Error was encountered when sending the order to Oracle
- Order is being sent to Oracle
- Order has not yet been sent to Oracle
- Order has been entered into Oracle Order Interface table

Date: The date field is automatically set to run the report on the past 30 days. If necessary, use the drop-down boxes to change the date range.

Click **Submit**.

This will return you to the Reports page where your file will be listed.

When your file has been processed, you may download and view the results.

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Financial Charge Back

(For internal ACT use only)

User Role Access: Ultra User, Financial Charge Back Reports, Finance Reporting, Report Manager

- *The Financial Charge Back Reports role must be assigned in conjunction with the Report Manager role for the report to be activated.*
- *The Finance Reporting Role allows access to both the Financial Charge Back and Financial Order Reconciliation Report.*

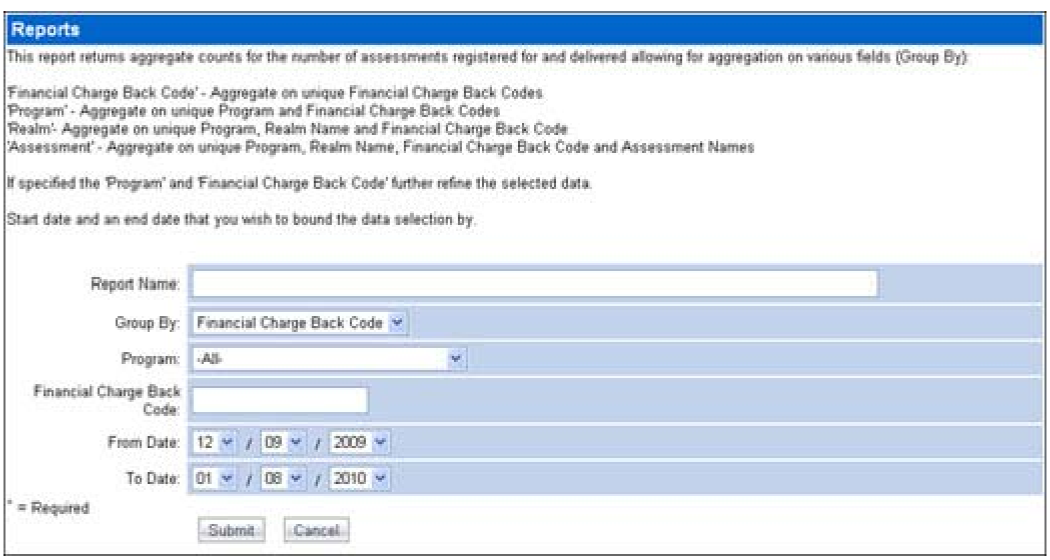
This report shows the number of assessment registrations and assessments launched for the realm you are logged into. Data may also be gathered by project code and results grouped by charge back code, program, realm, and assessment.

Create new report

If any files are already in the system and/or are being processed, they will be displayed for you on the reports page.

Click **New Report** to build a new Financial Charge Back report.

Set your parameters for building your Charge Back report.



**Indicates a required field.*

All of these fields are optional. Using them will help you narrow down and organize your report data.

Report name: The system will generate a name for you. Otherwise, enter a name for your report. It should be something you will be able to identify later.

Group By: Use the drop-down box to indicate how you wish to group your report data: by **Financial Charge Back Code**, **Program**, **Realm**, and **Assessment** names. Note that each category is added to the next and is not independent of each other.

e.g., If you group your data using the third parameter, **Realm**, your data would be sorted by Financial Charge Back Code, Program, and Realm. However if you select the first parameter, **Financial Charge Back Code**, that is the only sorting parameter used in the report.

Program: Use the drop-down box to select the program from which you want to draw the report. (Or select **-All-** to run it on all programs.)

Financial Charge Back Code: Project code used by the ACT Finance department to collect usage data.

Date: The date field is automatically set to run the report on the past 30 days. Use the drop-down boxes to change the date range if necessary.

Click **Submit**.

This will return you to the Reports page where your file will be listed.

When your file has been processed, you may download and view the results.

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References

User Role Access: All user roles

This Online Administrator Guide (or other applicable reference manual) is accessible to anyone who logs into the Virtual Test Center Administrator Console.

Click **References** from the main menu. The Online Help System will open in a separate pop-up window.

Return to the VTC application at any time by clicking in the VTC window. You may leave the guide open in the background if you wish to refer to it, or if you are finished reviewing and/or printing the material, close the pop-up window.

- Printing the help topics and PDF help
- Navigating the Online Help
  - Contents
  - Index
  - Search

NOTE: Depending on your workstation and browser settings, the help launch may prompt you to accept an ActiveX control. You may be asked to **Allow Blocked Content** which will enable the help to display correctly.

Printing the help topics and PDF help

Online Help System – Print any help topic within the online help. Right-click the frame you wish to print and select **Print** from the pop-up menu.

PDF Printed Guide – Click to view the contents of the Online Help System in PDF format. Once open, click to **Print** using the Adobe® Acrobat® Reader® interface.

To view the PDF reference material, you must have the Adobe Acrobat Reader® installed.

Navigating the Online Help

There are three tabs at the top of the help system navigation bar. These tabs will help you find the information you are looking for.

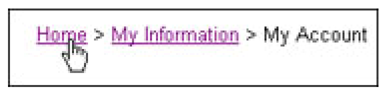
- Contents
- Index
- Search

Use the scroll bar in each frame to view the contents or click and drag the window borders to adjust the size of the help window.

Contents

Click the **Contents Tab** located in the help window to view the Table of Contents for the online help.

- **Find a page** – Click the **book icon** to view the pages stored under each book.
- **Open the help page** – Click any page listed on the Table of Contents. Click the links within a help page frame to navigate to other content pages and/or bookmarks within the help.
- **Breadcrumb trail** – The breadcrumb trail at the top left will tell you what page and book you are on. Click the links to skip back to a previous page or book.



- **Close Table of Contents frame** – To close the Table of Contents and view just the help page, click the **X** at the top right corner of the Table of Contents frame. To reopen the frame, click the **Contents** tab.

Index

Click the **Index** tab to view a list of help keywords, topics and ideas in the online help.

- **Find a keyword** – Type a **keyword** to jump to that location on the list. Or scroll through the list to view all of the keywords. Click on any index keyword.
- **Open the help page** – If only one help page is attached to the selected keyword, it will be displayed in the frame on the right.

  If more than one help page is attached to a keyword (as in the example shown to the left), a list of related help pages will be shown. Select the page title to display in the frame on the right.

- **Close Index frame** – To close the Index keyword list and view just the help page, click the **X** at the top right corner of the Index frame. To reopen the frame, click the **Index** tab.

Search

Click the **Search** tab to find a specific word or phrase in the online help pages.

- **Find a page** – Enter the word or phrase you are looking for. Click the **GO** button located next to the text entry field or press Enter when you have typed your search word(s).
- **Open the help page** – The list of pages containing your search word will be displayed in the Search frame on the left. Click the page title to display the help page with your search word(s) highlighted in the frame on the right.

  If No Topics Found is displayed, try another search.
- **Close Search frame** – To close the list of page returns and view just the help page, click the **X** at the top right corner of the Search frame. To reopen the frame, click the **Search** tab.

NOTE: Users may choose to replace the Online Help System with another URL linking to a PDF or reference of their choosing and/or creation. Those with Realm Management level access should see the Templates Tab description under the topic *Create a New Realm*. Entering key field **VTC_REFERENCE_URL** and entering the **URL** address replaces the reference guide for the realm.

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Requirements and Workarounds

Hardware/Software Requirements for Validus® ThinWeb & Survey Assessment Delivery

The following chart reflects the hardware and software requirements for using the Validus ThinWeb test delivery system:

Web Browsers [1]	Testing Workstations	1. Microsoft Internet Explorer 7 & 8 2. Firefox 3 & 3.5*
	Administrator Workstations [2]	1. Microsoft Internet Explorer 7 & 8 2. Firefox 3 & 3.5*
Operating Systems	1. Microsoft Windows XP with current service packs applied. 2. Microsoft Windows Vista Home Premium. 3. Apple MAC OS 10.5.x is supported using the Firefox web browser only, Safari is not supported at this time.	
Screen Resolution	1024 x 768 *(Not a hard requirement but reflects the minimum recommended for optimal use)*	
Special Browser Considerations	The workstation browser must have JavaScript enabled and no AJAX (Asynchronous JavaScript and XML) blockers.	
Reporting	Adobe Acrobat Reader is required to view reports. Some report files are delivered as compressed zip files. To retrieve the information a suitable un-compress utility will be needed.	
Network	1. Standard Web port 80 must be open. 2. Secure Socket Layer (SSL) Port 443 must be open 3. The ACT domain (ACT.org) and address space can not be blocked. 4. Testing Workstations must have sustained broadband connections of at least 256Kbits/second download capacity or better, i.e. a dedicated T1 internet connection will support approximately six simultaneous testing sessions. Dialup connections are not supported.	

[1] OS's and Browser versions listed indicate configurations that have been vetted by ACT. Others may work but will not be supported if issues arise.

[2] Some program-specific reporting sites that are available on the Report Portal menu item require Internet Explorer.

Known Issues and Workarounds

- Selecting **GoTo RSP** does not work when using the Firefox web browser.
- Choosing the parameter "Orders Not Booked/Not Closed" under Financial Order Reconciliation Report does not properly return data.
- The Preview Attributes function does not work correctly in End User Edit and VTC Admin Edit preview modes.

*Firefox 3.5 Settings

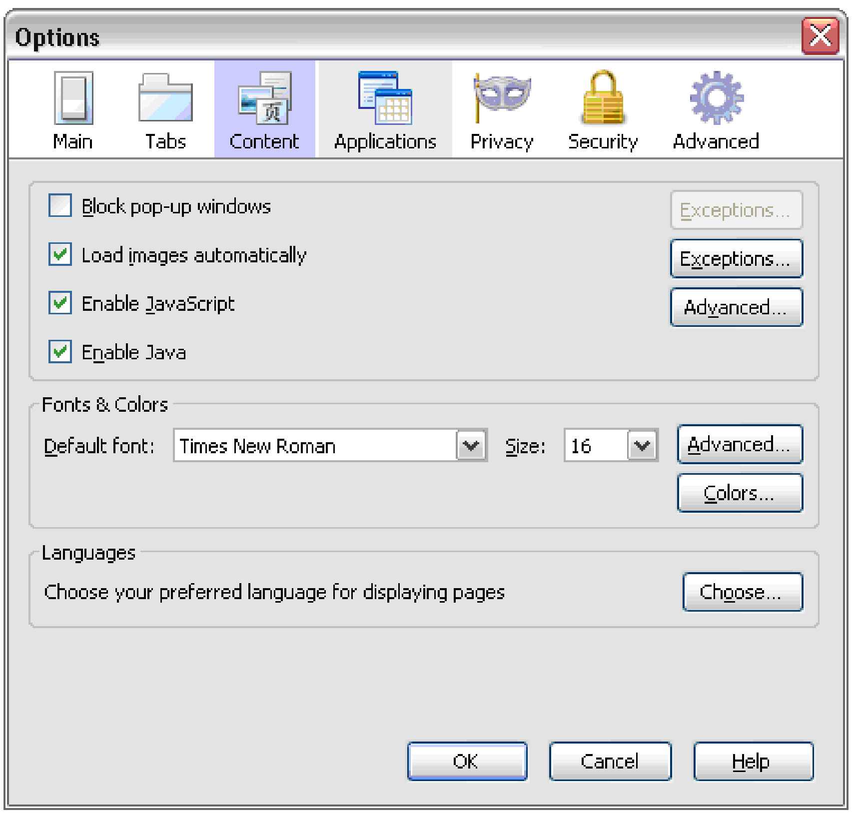
Users with Firefox 3.5 who intend to use the RSP Callback feature must have the pop-up blocker turned off and set security configurations to allow application scripts to close the RSP pop-up window.

TURN OFF FIREFOX 3.5 POP-UP BLOCKER

From the Firefox menubar, click **Tools** -> **Options**.

Select **Content** from the Options menu.

Disable the checkbox for **Block pop-up windows** as shown below.



Click **OK**.

SET FIREFOX SECURITY CONFIGURATIONS

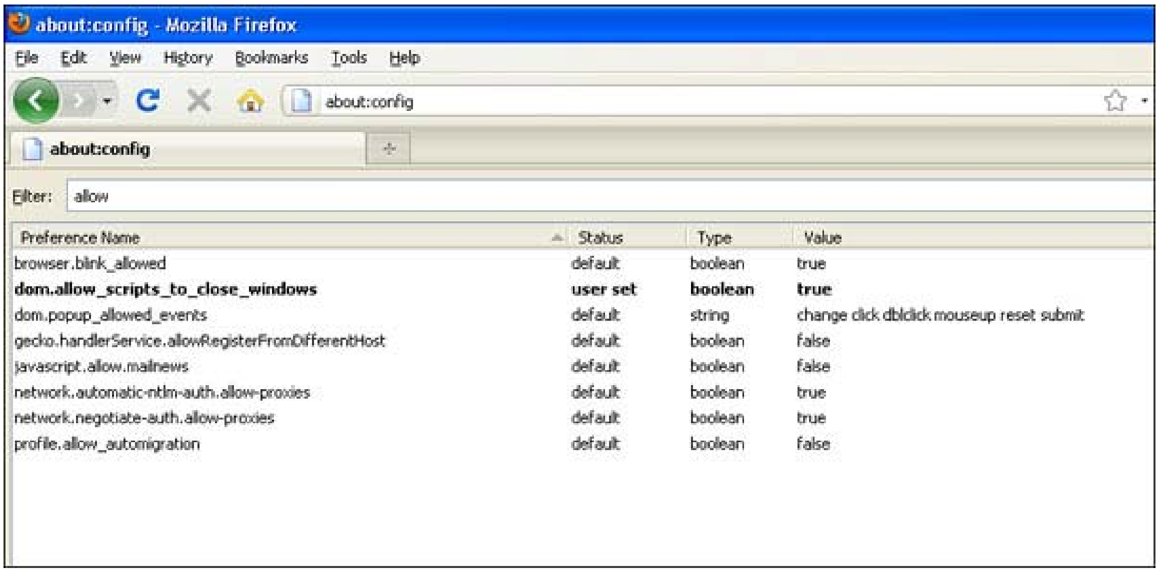
In the Firefox URL address bar, type *about:config*

A warning message will appear, cautioning you before you proceed. Agree to the warning.

A list of Firefox preferences will be presented.

In the **Filter** field, type the word "allow" to filter your list of preference names.

Double click the option *dom.allow_scripts_to_close_windows* which will reset the Value from false to **true** as shown below.



This will allow application scripts to close the RSP pop-up window after test launch is complete.

You may close the Firefox window or return to browsing.

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Appendix A: Handling CSV Files

There are many points within the Virtual Test Center Administration Console where .CSV files are used. Whether the files are uploaded, downloaded, or generated, the applications used to view these files (such as Microsoft® Excel®) can sometimes cause confusion or errors during handling.

- *You may use any CSV file editor to display and generate CSV files.*

Uploading Files

- All columns that are included in the file are automatically processed during file upload. If your realm requires certain data, those columns must included and/or must be filled in. You cannot upload a blank column that is marked as required data.
- No additional text may be uploaded except the column headers and the column data. Any additional text (such as comments included in the original header file designed to help you fill out a Batch Load file, or any notes you have made) must be deleted before saving the file and upload.

Notes for Excel users

Opening Excel files

- Depending on your workstation settings, you may need to open Excel before clicking to open the CSV file. Excel may not open automatically.
- If you need to reopen your CSV file you are preparing for upload, do not simply "open" the file. If you do, you will need to re-structure your dates and columns each time you open the file.

  Instead, open the file as a text-only, comma-delimited file using the Data-Import Wizard in Excel.

1. Start a new file in Excel.
2. Select the **Data** file menu.
3. Click **Import External Data**.
4. Click **Import Data**.
5. In the Select Data Source dialog box that appears, make sure the drop-down for "Files of type" is set to Text Files (where .csv is listed). Browse to locate your .csv file.
6. Using the Import Wizard, Step 1 of 3 – Make sure **Delimited** is selected and click **Next**.
7. Import Wizard, Step 2 of 3 – Check **Comma** as the only Delimiter and select quotes (**"**) as the Text qualifier. In the data preview, it should show a vertical line between each of your columns. Click **Next**.
8. Import Wizard, Step 3 of 3 – Select **Text** as the Column data format. Then, click the first column in the data preview section. Highlight all of your columns by pressing the Shift-key, scrolling to end, and clicking the last column. Click **Finish**.

Formatting your Excel data

- Remove any automated hyperlinks in your file by right-clicking on the hyperlink and click **Remove Hyperlink**.
- VTC requires all dates to be in the format mm/dd/yyyy which means January 1, 2010 must be specified as 01/01/2010.

  If you use Excel to create and edit your CSV file for importing data, Excel automatically strips the leading zeroes from numerical date fields. This will cause your CSV file to fail during upload.

  To prevent Excel from editing your data, enter the date with a leading apostrophe as '01/01/2010. Save your file in CSV format.

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