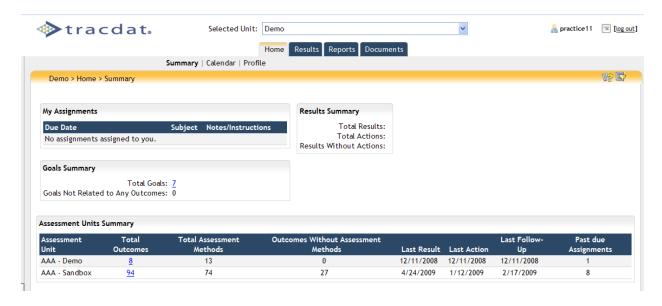# Tracdat roles: "Admin" vs. "User"
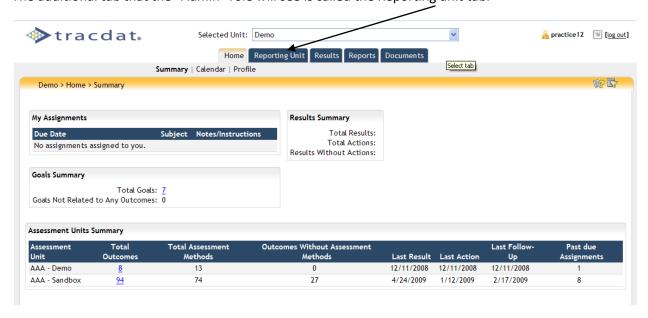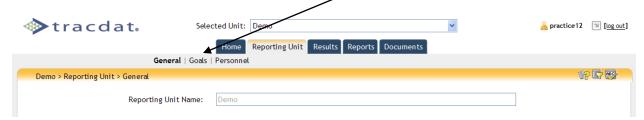
Reporting Units

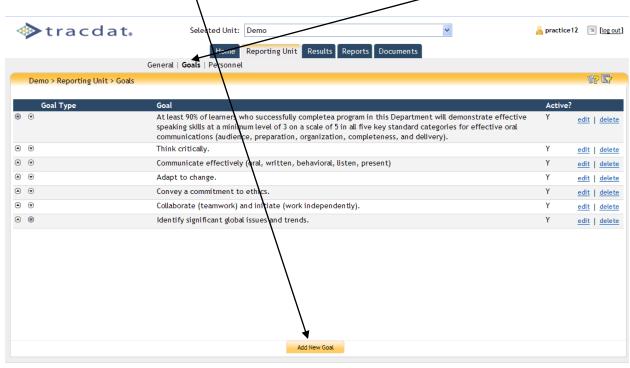"User" role will see:

"Admin" role will see:

The additional tab that the "Admin" role will see is called the Reporting unit tab.
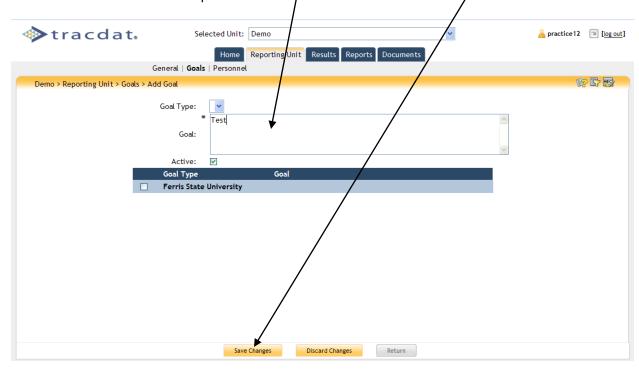
The Reporting unit tab has sub tabs of <u>General, Goals and Personnel.</u>
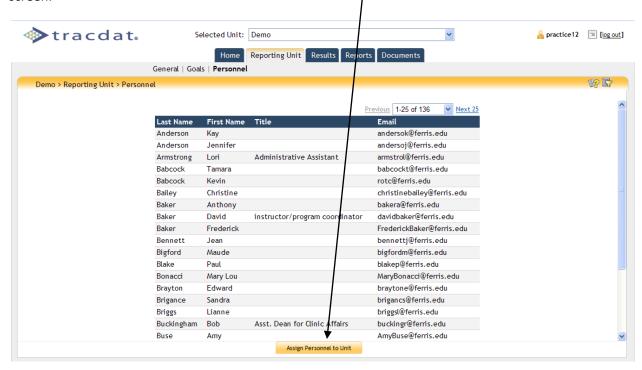

The "admin" will be able to enter Goals for the reporting unit by clicking on the "Goals" sub tab. To add a new goal, click on the "Add New Goal" button at the bottom of the page.
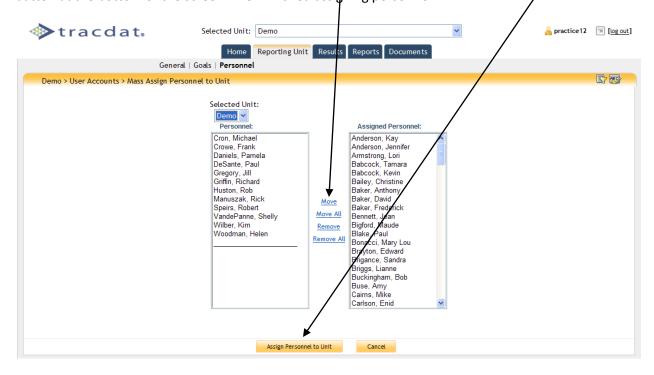
The "admin" would then type the goal in the "Goal" box. Click on the "Save changes" button at the bottom of the screen when complete.

The "admin" will be able to add personnel to the reporting unit for "e-mail only" access. To add personnel for "e-mail only" access, click on the "Assign Personnel to Unit" button at the bottom of the screen.
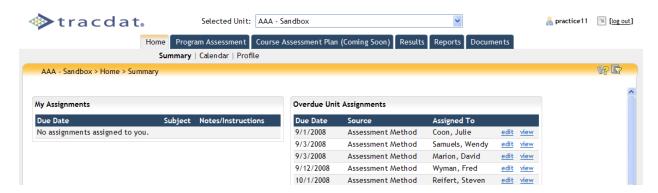
Click on the Personnel name and then click on the "Move" option to add that person to the Assigned Personnel list. You may also "remove" personnel from the unit. Click on the "Assign Personnel to Unit" button at the bottom of the screen when finished assigning personnel.
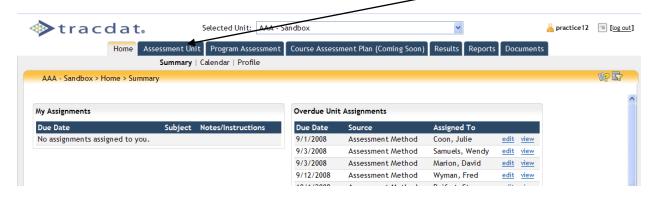

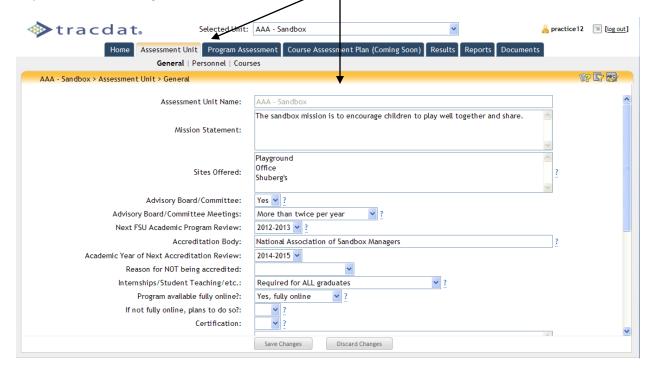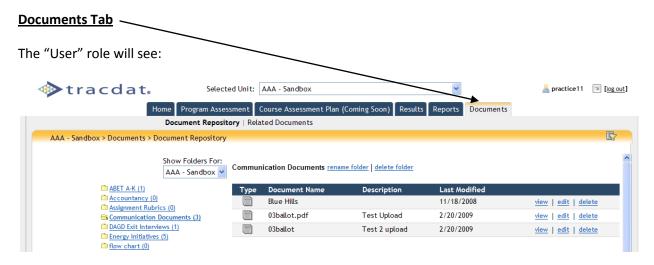## Assessment Units

"User" role will see:

"Admin" role will see:

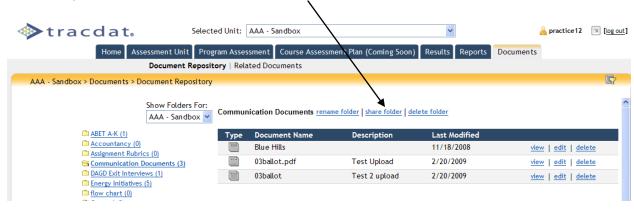The additional tab that the "Admin" role will see is called the "Assessment unit" tab.

The Assessment unit tab has sub tabs of **General, Personnel and Courses.** The "admin" will be responsible for entering the information on the General sub tab.

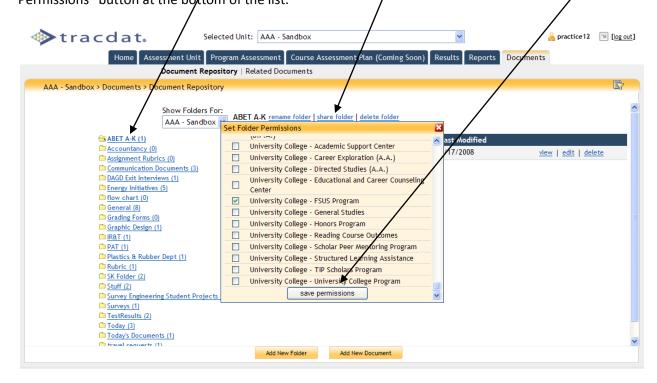## Documents Tab

The "User" role will see:

The "Admin" role will see:

The extra option that the "Admin" has is to "share folder".

To share a folder, click on the folder name. Then click on "share folder". A window will pop up called "Set Folder Permissions". Check the units that you want to share the folder with. Click the "Save Permissions" button at the bottom of the list.

The "shared" folder will now have a hand symbol on it because it is shared. To remove a folder from being shared, follow the above steps and remove the check from the units. Click on the "save permissions" button at the bottom of the list.