



**Administration for
Children's Services**

QUICK REFERENCE GUIDE:

MANAGING USERS (VOUCHER PROGRAMS)

MANAGE USERS

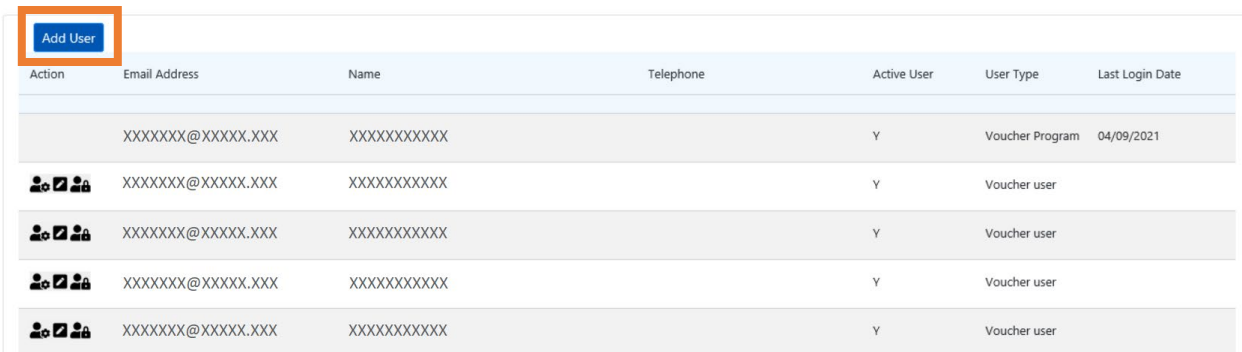
The Manage Users option in the menu allows you to manage all of the people associated with your program who are able to access your CAPS Online system.

ADD A USER

1. To grant a new user access to the system, select the **Add User** button at the top of the page.

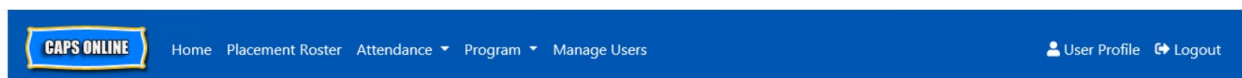


Users

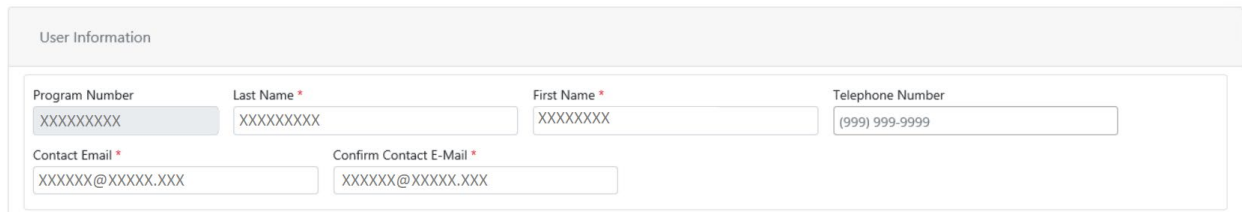
The screenshot shows a table with columns: Action, Email Address, Name, Telephone, Active User, User Type, and Last Login Date. The 'Add User' button is highlighted with an orange box. The table contains five rows of placeholder data.

| Action | Email Address | Name | Telephone | Active User | User Type | Last Login Date |
|--------|--------------------|--------------|-----------|-------------|-----------------|-----------------|
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher Program | 04/09/2021 |
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |

2. The User Info page will appear. Here, you can add the new user's information. First Name, Last Name, and Contact Email are required fields. The user must create a NYC ID using the same email address added below in the user info page in order to access the system.



User Info

The screenshot shows the 'User Information' form. It has fields for Program Number, Last Name, First Name, Telephone Number, Contact Email, and Confirm Contact E-Mail. The 'Save' button is highlighted with an orange box.

User Information

Program Number: XXXXXXXX | Last Name *: XXXXXXXX | First Name *: XXXXXXXX | Telephone Number: (999) 999-9999





Contact Email *: XXXXXXX@XXXXX.XXX | Confirm Contact E-Mail *: XXXXXXX@XXXXX.XXX

3. Click **Save** to complete.


If a user is already listed, you can manage their role, permissions/access, using the icons in the **Action** column on the left. This can be updated at any time.

Users

Add User

| Action | Email Address | Name | Telephone | Active User | User Type | Last Login Date |
|---|--------------------|--------------|-----------|-------------|-----------------|-----------------|
| | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher Program | 04/09/2021 |
|  | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
|  | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
|  | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |
|  | XXXXXXXX@XXXXX.XXX | XXXXXXXXXXXX | | Y | Voucher user | |

There are three icons with the following functions:

 **Manage Roles:** If a user is already listed, you can manage their role, permissions/access, from the manage roles icon. For example, if you only want a user to be able to view closures but not add or edit closures, you would check the box in the “Read Only” column next to Closure. Alternatively, if you would like the user to be able to add or edit closures, you would check the box in the “Read Write” column next to Closure.

Manage Roles

User Information

Email Address
XXXXXXXX@XXXXX.XXX

User Name
XXXXXXXXXX


Phone
[Input Field]

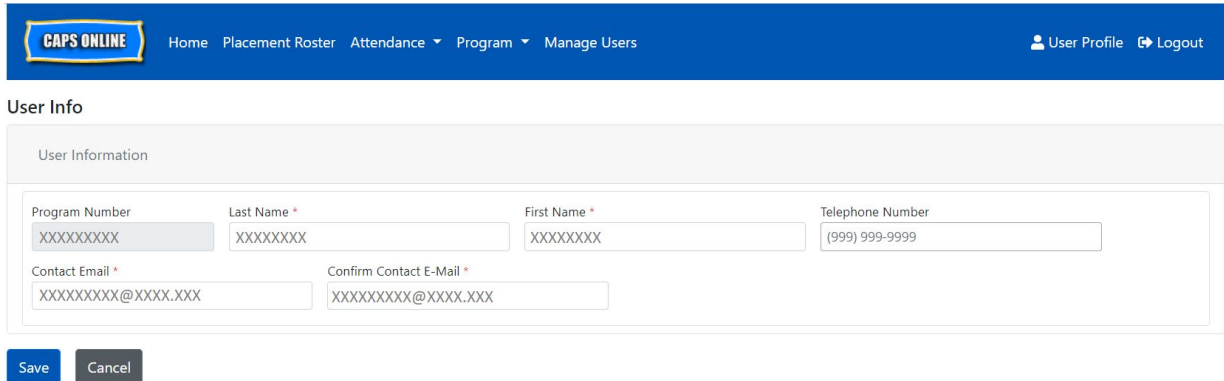
Last Login
[Input Field]

Roles for User : SAMCOOPER@GMAIL.COM

| Description | Read Only | Read Write |
|-------------------------|--------------------------|--------------------------|
| Placement Drop (PD) | <input type="checkbox"/> | <input type="checkbox"/> |
| All Attendance (AA) | <input type="checkbox"/> | <input type="checkbox"/> |
| TITO Attendance (AT) | <input type="checkbox"/> | <input type="checkbox"/> |
| Closure (AC) | <input type="checkbox"/> | <input type="checkbox"/> |
| Monthly Attendance (AM) | <input type="checkbox"/> | <input type="checkbox"/> |

Save **Cancel**

 **Edit a User:** Editing a user will allow you to change their name, phone number, or email address. Program number and email address are not editable fields.



CAPS ONLINE Home Placement Roster Attendance Program Manage Users User Profile Logout


User Info

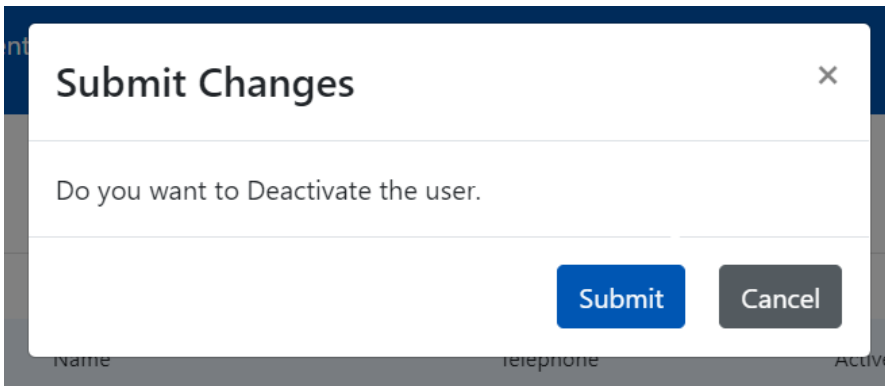
User Information

Program Number: XXXXXXXX Last Name *: XXXXXXXX First Name *: XXXXXXXX Telephone Number: (999) 999-9999

Contact Email *: XXXXXXXX@XXX.XXX Confirm Contact E-Mail *: XXXXXXXX@XXX.XXX

Save Cancel

 **Enable/Disable a User:** Select this icon to enable or disable the user's access to the system.



Submit Changes X

Do you want to Deactivate the user.

Submit Cancel