



# NTACT

National Technical Assistance Center on Transition

## Transitionprogramtool.org – Updates and New Features – May 2019

### Team leader, Facilitator, Notetaker, and Team Member

#### 1. Login page

- The previous version did not consider email address and username as the same element when they actually were the same, allowing users without a valid email address to login. The username field disappeared and to login in now, the system requests a valid email address and a password.

Figure 1: NTACT planning tool login page. To the left the previous version requesting username. To the right the current version requesting valid email, address.

- It is possible for users to reset their passwords using “Forgot my Password” link. They will receive an email with a temporary password to login, and then will be asked to set a definitive password.
- Support email address [customersupportNTACT@ucf.edu](mailto:customersupportNTACT@ucf.edu) goes directly to Shana and Claudia to handle questions and possible issues.

#### 2. Roles

- New concepts
  - Active assessments: the most recent assessment created for state or local team. Helps to know from where to carry forward the team members list and pull previous year goals.  
Ex: Rhode Island 2019 – active assessment  
Rhode Island 2018...2013 – inactive assessments
  - Active users: A user is active if he/she is associated with an active assessment. If a user is not in the team members list of an active assessment the user does not need to be viewing or editing data in the system. This concept applies only to team roles.

- Team roles
  - Team leaders:
    - Can VIEW and EDIT team’s previous assessments (edit only if planning/reporting turned on).
    - Add, remove, and change roles of team members and notetaker.
    - Is copied forward.
    - Assigned just by Admins
  - Team members:
    - VIEW only within the linked assessment.
    - No adding, removing, or changing roles of team members.
    - Is copied forward
  - Facilitators:
    - Can VIEW and EDIT assessment with the link assessment, and can VIEW team’s previous assessments.
    - Add, remove, and change roles for team members and notetakers.
    - Not copied forward.
    - Assigned just by Admins
  - Notetaker:
    - Assigned by team leader during the first meeting if needed
    - VIEW and EDIT within the linked assessment
    - Add and remove team members
    - Is copied forward

## Assessments

- States/locals will have just one assessment per year to make sure the “Copy last year goals” functionality is connecting to the right assessment.
- A State-Region-Local hierarchy is now available for states that use this structure.

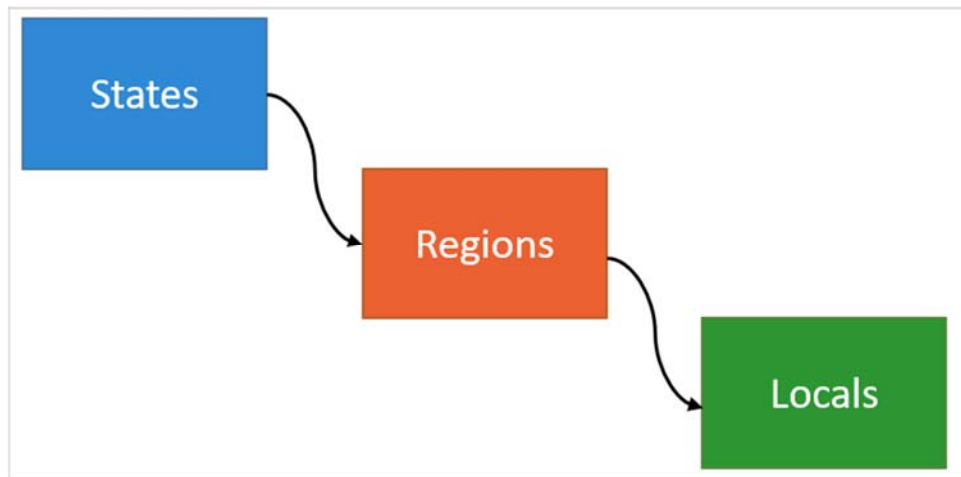


Figure 2: New assessment hierarchy

- Users linked to an assessment will have VIEW only access after admins turn planning and reporting off.
- The *Current Status* section on Dashboard now includes general information about the assessment.



Figure 3: Current Status section on the Dashboard. To the left the previous version. To the right the current version including title, state, local and continue assessment and showing history buttons.

- Continue assessment button: will take the users where they left off in the planning process.
- Show history button: Show all the changes made in the assessment.
- When adding new team members in Step 1, the system checks to see if that person (email) is already in the database to avoid duplicates. A pop up will show a warning letting you know the user already exists.
- Copy last year's goals is linked to the most recent assessment, not to the previous year assessment.

## NTACT Staff

### 1. Roles

- System Roles
  - NTACT Admin:
    - VIEW and EDIT all assessments. Add team leaders and facilitators.
    - Set up hierarchies - States, Regions, and Locals.
    - Add and update users
    - Assign system roles
    - Create assessments
    - Turn planning and reporting on and off
  - NTACT staff
    - VIEW all the assessments at scope level assigned
    - Cannot add, remove or change roles of team members
    - Cannot edit assessments
    - Cannot access admin tool

- Privilege Oversight:
  - VIEW and EDIT all assessments at scope level assigned
  - Add and remove team members only
- Observer:
  - VIEW all assessments at scope level assigned
- Hidden users disappear, system roles take care of this functionality.

## 2. Assessments

- New hierarchy allows assigning multiple assessment to the same user according to their responsibilities without having to be part of the team members list.

## NTACT Admin

### 1. Users

- Only Admins can add, change and remove team leaders and facilitators.
- The archive functionality disappears. The system is now capable of activating or deactivating a user according to its relationship to an active assessment.
- Facilitator's information does not move forward anymore. Admins will set up facilitators when needed.
- Add New User is a new functionality in the Users tab on the Admin Tool. The system checks if the email address exists in the database avoiding duplicates. The email address is used as password if no password is entered. Force PW Reset is set so after login for the first time users are asked to set their definitive password.
- Users tab now contains more information about the user. If user is in a team role, the table shows the role but also the type of plan, the state, the region and the local.
- Admin users can impersonate other users to help "see" and troubleshoot a user's issues.

Continued on next page

**Edit User**
Show History
Impersonate

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### User Details

First Name

Last Name

Email

State

Organization:

Position

New Password

Force PW Reset

[Save User Info](#)

### Status

**Active**

\* An active user is someone who has at least one system role or is on one or more team(s) for active assessments. Active users can log in. When there are no system roles and are not assigned to any active assessments, the user is automatically set to inactive and will not be able to log in.

### System Roles

Add roles for this contact: +

No system roles assigned.

### Teams - Active Assessments

Title	Year	Role	Type	State	Region	District
<a href="#">Untitled (ID: 1855)</a>	2018	Facilitator	Local	Utah		Washington
<a href="#">Untitled (ID: 1680)</a>	2017	Team Leader	State	Utah		
<a href="#">Untitled (ID: 1955)</a>	2018	Facilitator	Local	Utah		Iron County

[@ Teams - Inactive Assessments](#)

Figure 4: Users new structure in the Admin Tool.

## 2. Assessments

- Set Planning Availability and Set Reporting Availability buttons are new functionalities on Assessment tab. Now it is possible to turn on and off both to entire states or regions.
- No need to have archive functionality for assessments. The system determines if a plan is active or not. There is no need to remove assessment because just one will exist per year.