


NACCAS CRM Owner Screen Updates

Changes have been made to the owner screen in the NACCAS CRM. When you next login you will see a series of tabs that look like this:



[Home](#) | [Logout](#)

NACCAS Customer Relationship Management System

Manage Users - (use this to assign rights for other individuals to input or upload data)	Click to Show Content...
Annual Reports	Click to Show Content...
Financial Reporting	Click to Show Content...
Institutional Self Study (ISS)	Click to Show Content...

4/18/2011 - Version 1.6.1041

When each tab is expanded, you will have the ability to enter your annual reports, upload financial reports and now upload Institutional Self Study (ISS) documents. In addition, we have also added in the ability for the school owners to manage their own login usernames and passwords so that you can manage access (for your internal users) to your annual reports, financial reports and ISS documents on a user-by-user basis.

To Manage Users, expand the tabbed panel by clicking on it. Click on the red “Add New User” to add a new user and use the checkboxes on the right column to assign the new user access to the annual reports, financial reports or ISS documents.

Manage Users - (use this to assign rights for other individuals to input or upload data) [Click to Hide Content...](#)

Owner: You have the ability to assign 'user rights' to input or upload information into specific areas, such as your Annual Report, Financials, ISS, etc. To use this function click the red "Add New User" link below to add a user. Once a user has been added, you may edit (to activate/deactivate a user or to add/delete a right for a particular function previously granted) the user record by clicking on the 'Edit' link.

Active	Name	Rights	Edit
<input checked="" type="checkbox"/>	New User	AP ISS	Edit

User Information

Active:

First Name:

Last Name:

Username:

Password:

Verify Password:

Email:

What can the user do?

View/Edit Annual Reports:

View/Upload Financial Reports:

View/Upload Institutional Self Studies:

Records per page: 5
Save | Cancel - Records: 1 - 1 of 1 - Pages:

Once a user has been added, you may edit his account settings by clicking on the “edit” link in the right hand column. When the “Active” checkbox is checked, the user is active and when it is unchecked, he is made inactive and cannot log into the system.

The annual report tab has not changed and still allows you to enter annual report information for all schools listed under you owner ID.

Annual Reports [Click to Hide Content...](#)

Please select one of the main campus schools from the list below and then select the annual report (by year) you wish to fill out, edit or view.

Note: A main and all of its branch campuses must combine information when submitting the Annual Report as they are considered one institution

Main Campus Schools

Complete/Edit/View Annual Report

[Click to Update Email](#)

Please verify your email address above

The financial reporting tab contains a link to the financial reporting page:

Financial Reporting [Click to Hide Content...](#)

[View/Submit Financial Reports](#)

By clicking on the “View/Submit Financial Reports” link you will be directed to a page where you will be able to upload financial documents in PDF format.



NACCAS Customer Relationship Management System

Financial Reports

Fiscal Year: 2011

Type	Status	Date	Documents for Fiscal Year 2011	Comments
Annual Financials	Submitted	05/11/2011	View [ISS Condensed.pdf]	big
Annual Financials	Submitted	05/11/2011	View [ProtectDocument.pdf]	
Annual Financials	Submitted	05/11/2011	View [iPhoneAppProgrammingGuide.pdf]	iPhone
Annual Financials	Submitted	04/13/2011	View [ASTE-6Z7V7R_R0_EN.pdf]	No comments
Annual Financials	Submitted	04/13/2011	View [ASTE-6Z7V7R_R0_EN.pdf]	with comments

Records per page: 5
Records: 1 - 5 of 9 - Pages: 1 2

[Requirements and instructions for submission of PDF documents](#)

Note: PDF file size limited to 28MB. Assemble all information into a single PDF document
Please read the requirements and instructions (link above) for detailed information

Upload Financial Document

Type of Financial Document:

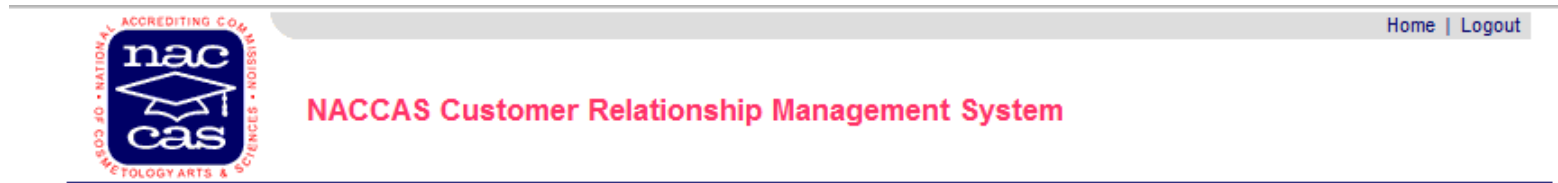
Financial file to upload:

Comments:

The first thing you need to do is select the year that is associated with the financial report (select the year from the pull down menu and click “Change Year”). If financial documents have been previously uploaded, they will appear in the grid. Select the type of Financial document to upload and then click the “Select Financial File” button which will allow you to navigate to the document on your system. Note that financial reporting documents have to be in a PDF format and the file has to be less than 28MB in size. Click on the “Requirements and instructions for submission of PDF documents” link for detailed information. That document is also available on our web site by clicking [here](#). Enter any comments you might want to include concerning the financial document and then push the “Upload Financials” button to upload the document.

Once a financial document has been uploaded, it will immediately appear in the grid and you should receive an email saying that we have received it. Once the document has been reviewed, we will change the status to “accepted” or “not accepted” and alert you if there are any problems with the document.

We have recently added the ability to upload Institutional Self Study Documents to our system. Once you click on the ISS tab to open it, select the school associated with the ISS you are going to upload and you will see a screen similar to the financial reporting screen:



ISS Documents

Type	Status	Date	ISS Documents	Comments
Initial ISS	Submitted	05/11/2011	View [iPhoneAppProgrammingGuide.pdf]	test on server
Initial ISS	Submitted	05/11/2011	View [ProtectDocument_output.pdf]	maybe the final test?
Initial ISS	Submitted	05/11/2011	View [ProtectDocument_output.pdf]	
Initial ISS	Submitted	05/11/2011	View [ProtectDocument.pdf]	Enter any comments.
Initial ISS	Submitted	05/11/2011	View [iPhoneAppProgrammingGuide.pdf]	none

Records per page: 5 Records: 1 - 5 of 14 - Pages: 1 2 3

[Requirements and instructions for submission of PDF documents](#)

Note: PDF file size limited to 28MB. Assemble all information into a single PDF document and include bookmarks for each section and exhibit.

Please read the requirements and instructions (link above) for detailed information

Upload ISS Document

Type of ISS Document:

ISS file to upload:

Comments:

Select the type of ISS document from the pull down list and then click on the “Select ISS File” button to bring up a screen that will allow you to navigate to your ISS document in PDF format. Fill in the comments box if you have any and then click on the “Upload ISS” button.

Once the ISS document has been uploaded, the grid will update with the new information and you will receive an email confirming the upload.

Note that ISS documents have to be less than 28MB in size and contained in a single document. In addition, please add bookmarks to the PDF file for each ISS section and any exhibits. For detailed information as to the format of the PDF documents, please click on the red link on the page or you may view the document by clicking [here](#).

Failing to follow the instructions on the creation of your ISS documents could cause them to be rejected and late fees being assessed.

If there are additional questions, please contact Cliff Culbreath at 703-600-7600, ext. 135, or cculbreath@naccas.org.