

%



Manager



User
Guide

CASCAID Manager User Guide

Free with every subscription, CASCAID Manager is our powerful management and tracking suite that will allow you to monitor and evaluate your users' activity and better support their career guidance supervision.

Allowing for in-depth data to be gathered, as well as the option to organise by group/cohort or filter by activity, CASCAID Manager is designed to help you identify where users are within the guidance process, enabling you to plan interventions and meaningful support.

Using CASCAID Manager you can track activity in:

- Kudos
- Kudos AD
- Launchpad

This guide provides detailed support to help use CASCAID Manager. We also offer a range of training options and further support which you can access at www.cascaid.co.uk

Content:

Accessing CASCAID Manager _____ 4

Finding your way around _____ 4

Dashboard _____ 4

View Users _____ 5

User activity in different products _____ 5

Find a user _____ 5

Delete a user _____ 5

Edit user details _____ 6

User passwords _____ 6

Adding users to a group _____ 6

Removing a single user from a group _____ 7

User not in a group _____ 7

Print or download a single user report _____ 7

Print or download multiple user reports in one go _____ 7

Reset passwords for multiple users in one go _____ 7

Print or email login details for multiple users in one go _____ 7

Create Users _____ 8

Create a single user _____ 8

Create multiple users _____ 9

| | |
|----------------------|----|
| Upload an Excel file | 10 |
|----------------------|----|

Groups 11

| | |
|--|----|
| What is a group for? | 11 |
| Create a group | 11 |
| Find a group | 11 |
| Add users to a group | 11 |
| Add/edit email | 11 |
| Change the name of a group | 11 |
| Delete a group but keep the users | 12 |
| Delete a group and delete the users | 12 |
| Reset the password for all the users in a group | 12 |
| Print the login slips for all the users in a group | 12 |
| Print the user reports for all the users in a group | 12 |
| Add some of the users in this group to another group | 12 |
| Add the users to a new group | 13 |
| Move some of the users to another group | 13 |
| Move the users to an existing group | 13 |
| Move the users to a new group | 13 |
| Remove some of the users from this group | 13 |
| Delete some users found in a group | 13 |
| Reset the password for some of the users in a group | 13 |
| Print login slips for some of the users in a group | 14 |
| Print the user report for some of the users in a group | 14 |

Resources 14

Reports 14

Settings 15

| | |
|--------------------|----|
| Launchpad subjects | 15 |
| UCAS feedback | 15 |
| Account details | 15 |
| Intranet links | 15 |

Accessing CASCAID Manager

A subscription to CASCAID products also includes free access to CASCAID Manager. CASCAID Manager is accessible to advisers, teachers and administrators.

To access CASCAID Manager you will need to register your details to create a username and password.

If you have done this already, click on the CASCAID Manager link on the product login page and then enter your CASCAID Manager username and password.

If you have not yet registered your details on CASCAID Manager, click on the CASCAID Manager link on the product login page and then follow the instructions on the screen.

Please email enquiry@cascaid.co.uk or call **+44 (0) 1509 226868** if you require any help in accessing CASCAID Manager.

Finding your way around

You can navigate around CASCAID Manager by using the seven options in the navigation area at the top of the screen:

[Dashboard](#) [View Users](#) [Create Users](#) [Groups](#) [Resources](#) [Reports](#) [Settings](#)

The following sections tell you what you can do in each area.

Dashboard

The CASCAID Manager Dashboard gives you an excellent overview of exactly how your users have benefited by using the product.

You can tailor the overview to an individual school year, or you can select 'All' to view all years. Or you can view your users by Group or Gender. Simply select from the drop down menus.

The dashboard will provide you with information on:

- The percentage of users (in a specific year or overall) who have favoured a Work Area, Careers and/or Subjects
- The Work Areas, Careers and Subjects which have been most favoured by your selected users
- The Further Education Colleges and Universities which have been most favoured by your users
- The most searched Further Education and University courses
- The '*Distance Travelled*' by your selected users. This area consists of three charts which inform you exactly how many of your selected users don't know what Work Area to do, don't know what Career to do, and don't know what Subject to do.

You will be able to plan your future careers guidances activities from the data available to you in the dashboard.

View users

This screen allows you to manage user details. You can also access user reports. We call the main part of the screen the *'user grid'*.

User activity in different products

If you have a licence for more than one CASCAID product you will be able to see user activity for each product. You can access these using the drop-down menu at the top of the page.

Important:

- Group Name, Username, First Name, Last Name and Created Date are the same for all products.
- Depending on which licence you have, you will be able to filter your users according to their product activity, e.g. likes & dislikes, favourites, skills, UCAS activity and CV builder work. You will be able to easily identify who has started certain activities, and importantly, who hasn't.

Find a user

There are two methods of searching for users:

Either

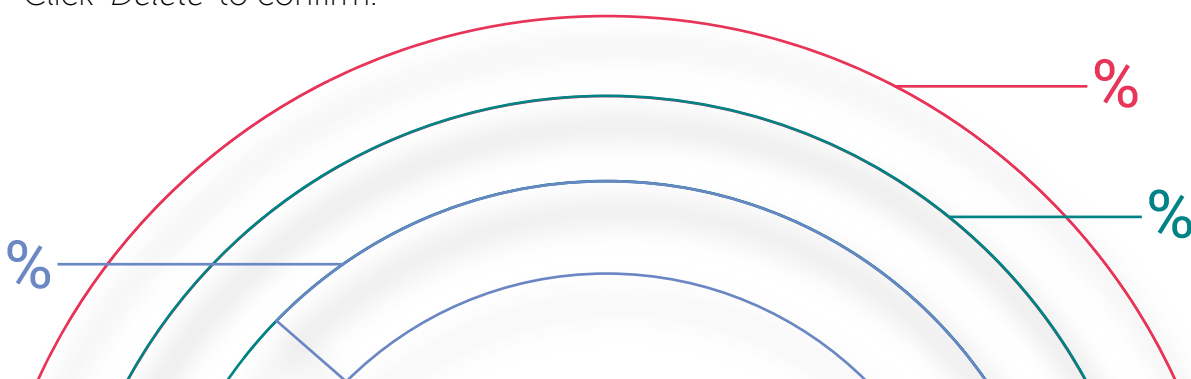
- Sort the user grid by clicking on a column header - e.g. clicking on *'username'* will sort alphabetically by username.
- Go through the user grid using the page numbers and the *'<'* and *'>'* buttons at the top.

Or

- Type the start of the user's username into the search box. Alternatively you can search by first or last name, password or email.
- Only the users who match the search term will be shown in the grid.

Delete a user

- Find the user in the user grid
- Tick the box on the left of the Group Name/Username to activate the buttons above
- Click on the *'Delete'* button
- A message will be displayed to confirm you want to delete the selected user
- Click *'Delete'* to confirm.



Edit user details

- Find the user in the user grid
- Click on the username to view their full details
- Edit their username, first/last name and/or email by typing in the appropriate text box. You can also add them to a new or existing group, and download Action Plan and user Plan Reports
- If adding to a new group, remember to add an email contact for the new group.
- Click 'Save'.

User passwords

If a user's password is shown as ***** this means that the password has been set by the user and therefore cannot be viewed in CASCAID Manager.

The password cannot be viewed for data security purposes but it can be reset. All visible passwords can be changed.

Change user password

- Find the user in the user grid
- Click on the username to view their full details
- Edit password by typing in the appropriate text box. This must be at least six characters long and contain at least one upper-case and one lower-case letter, and a number
- Click 'Save'.

Reset user password

- Find the user in the user grid
- Click on the username to view their full details
- Click on 'Reset Password' button
- Type in the new password
- Click 'Save'.

Adding Users to a Group

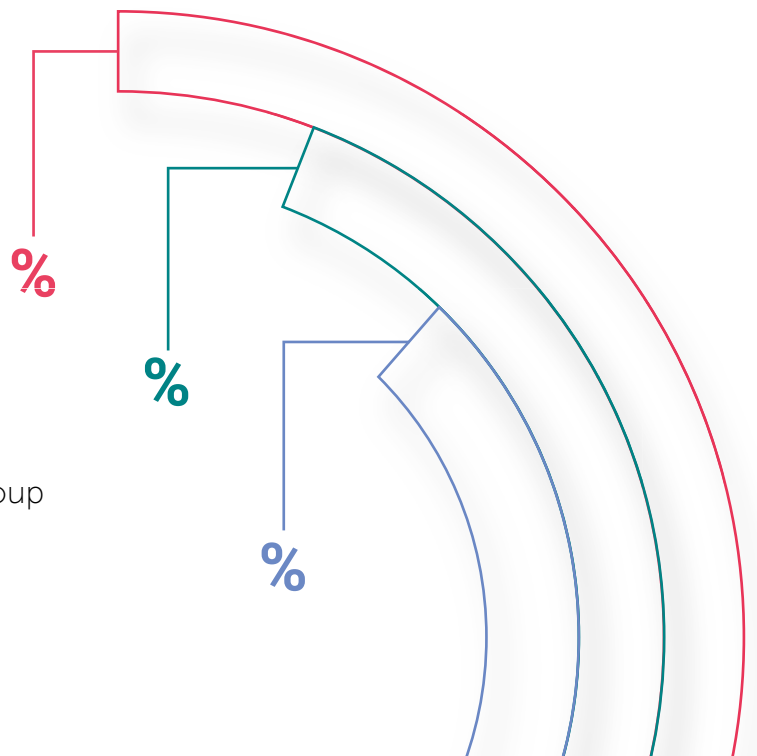
- Tick the box on the left of the Group Name/Username of every user you wish to add to a group
- Click on the 'Add to group' button.

Add users to an existing group

- Click 'Add to Existing Group'
- Pick from the drop down list
- Click 'Add'.

Add users to a new group

- Click 'Add to a new Group'
- Type in the name of the group
- Add a contact email address for the new group
- Click 'Add'.



Removing a single user from a group

- Find the user that you want to remove (see 'Find a user' on page 5)
- Click on the username to view the full user details
- In the sub-section 'Groups' find the group you want to remove them from
- Click 'Remove'
- Click 'Save'.

User not in a group

On the View Users screen you may see a notification box telling you that there are a number of users who are not in a group. Click in the box next to the user to be added, and click on the 'Add to Group' box. If you add to a new group you will need to add an email address for the new group.

Print or download a single user report

- Find the user (see 'Find a user' on page 5)
- Click on the username to view their full details
- Click on either 'Download Action Plan Report', 'Download User Report or Login Detail'
- You will need to select which product you would like the report on. The report will be downloaded as a PDF document that you will be able to save and/or print.

Print or download multiple user reports in one go

- Tick the box to the left of the Group Name/Username of the users that you need reports for
- Click on the 'User Report' button.

The report will open up in your browser, you will be able to save it or print it from there.

Reset passwords for multiple users in one go

- Tick the box to the left of the Group Name/Username of the users you want to reset passwords for
- Click on the 'Reset Password' button
- Type in the new password and press save.

Print or Email Login Details for multiple users in one go

- Find each user (see 'Find a user' on page 5)
- Tick the box to the left of the Group Name/Username of the users that you require Login Slips for
- Click on the 'Login Details' button.

You will now be given a choice to...

Either

- Email login details – this will send an email to the selected users, containing their login details. You can also add a message to the email in the box below.

Or

- Download login slips - login slips will open up in your browser, you will be able to save it or print it from there. Users should have an email address added to their user details.

Create users

When a user is created, they are created for every product that you have a licence for. There are 3 ways to create users in CASCAID Manager:

1. You can '*Create a Single User*' if you only need to create one or two
2. You can '*Create Multiple Users*' in one go, up to 200 at a time
3. You can '*Upload an Excel file*' if you already have your users stored electronically

Important:

- Every username must be different
- Usernames must be at least 6 characters long (this can be a mixture of letters and numbers, upper case and lower case)
- Passwords must be at least 6 characters long (this can be a mixture of letters and numbers, upper case and lower case)
- Login slips can be printed and given to users or emailed to them (if they have supplied an email address).

Create a single user

The quickest way to create individual new users is to go to the homepage of the product that you want to use, click on the '*USE*' button and enter your licence code in the '*Not signed up yet?*' section. You can then create a new user.

Alternatively, you can use the instructions below to create users in CASCAID Manager.

- Click on '*Create Users*' from along the top right of the screen
- Click on '*Create Single User*' button
- Enter a username – everyone must be different and be at least 6 characters long (this can be a mixture of letters and numbers, upper case and lower case)
- Enter a password - at least 6 characters long (this can be a mixture of letters and numbers, upper case and lower case)
- Enter first name
- Enter last name
- Enter an email address (we recommend adding an email address as this will enable the user to reset their password if they forget it)
- If you want to add your user to an existing group, click in the box and select your required group.
- **Alternatively**, you can create a new group. Click '*Add to a new group*' and type the name of your new group in the box
- When you create a new group you will need to add the email address of the person responsible for that new group
- Click '*Create*' to save the user
- Once user is successfully saved, you can print or send via email a single login slip by going to '*View Users*', click on the username, and then click on '*Login Details*'. You must always select the product you are using from the drop down menu.

Create multiple users

This is where you can create up to 200 users at a time. We generate the usernames and the passwords so you don't have to.

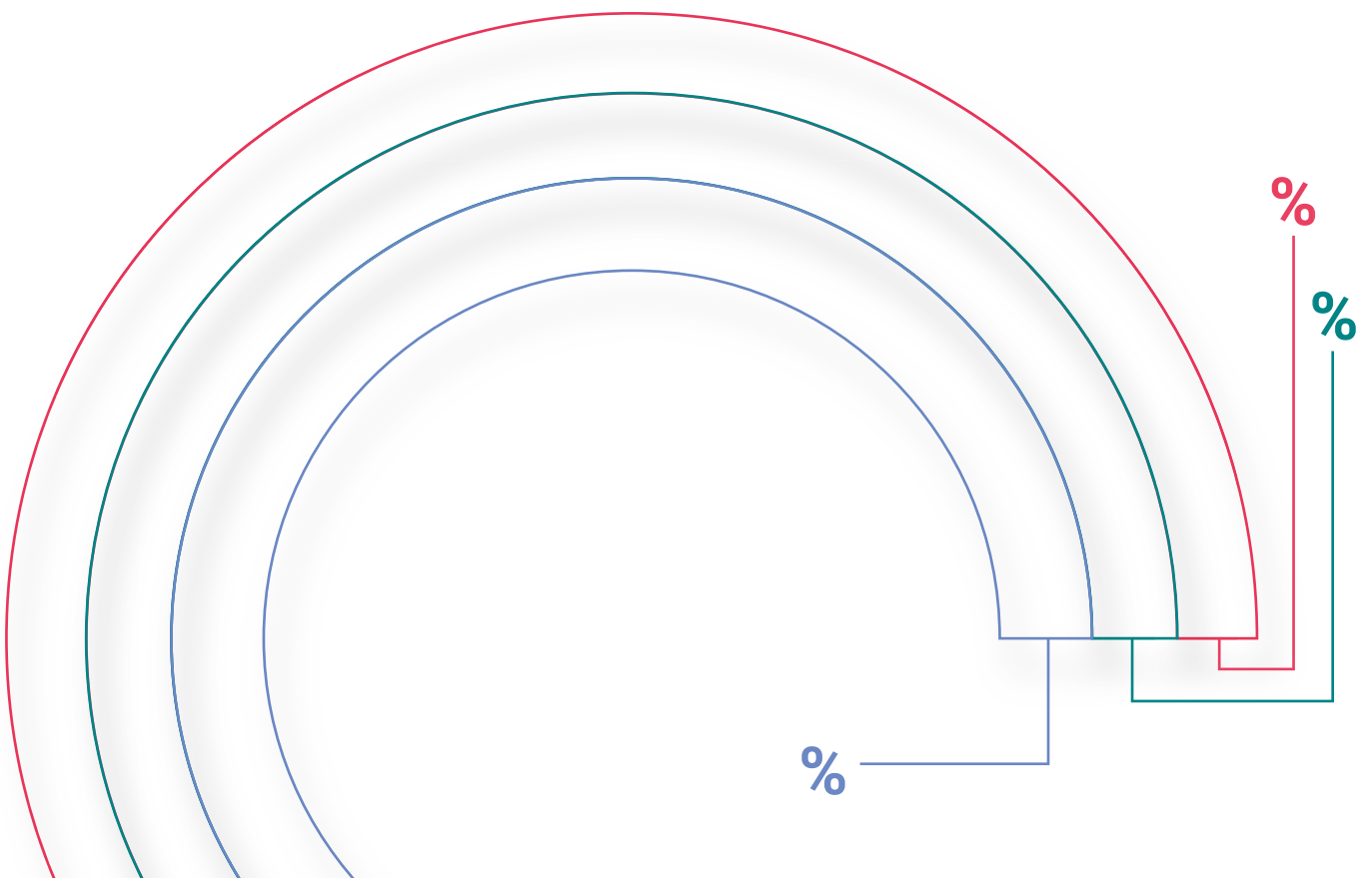
- Click on 'Create Users' from along the top right of the screen
- Click on 'Create Multiple Users' button
- Enter how many users you want to create.

Allocating users to a group

- If you want to add your users to a new group but have not created any groups yet, type the name of your new group in the box
- When you create a new group you will need to add the email address of the person responsible for that new group
- If you want to add your users to an existing group, click in the box and select your required group.

Usernames and passwords

- Tick the box if you want to 'set the same password for all the users.' In the box below, type in the password
- NB, usernames and passwords will be automatically created, for example 'KWKA8SVF' and '9s5egd'. You can edit usernames and passwords once they have been created
- Click 'Create Users' to create multiple users
- Once user is successfully saved, you can print or send via email a single login slip by clicking on the button 'Login Details'. You must always select the product you are using from the drop down menu.



Upload an Excel File

You can upload a list of users if you already have them stored electronically

Important:

- Only the Excel format will work
- In this method, you must supply at least the first and last names
- Group can be left empty
- Email can be left empty
- Username & password can be generated by you. Alternative randomised details will be generated
- Click on *'Create Users'* from along the top of the screen
- Click on *'Upload an Excel file'* button
- Up to 500 users can be imported.

Excel file

The grid shows what information is needed and the order which it needs to be in. To help we have created a template. Click on *'Download an Excel template'* and open it.

Add the information as per the headings and save it.

- Click *'Choose File'*
- Once found, click *'Open'*
- Click *'Upload'* button.

If there are no errors:

- Click *'Upload these Users'*
- Once the users are successfully uploaded, you can print all the login slips by clicking on the button
- *'Print or email Login Details'*.

If there are errors:

- At the top of the page there will be a list of errors detected. Work your way through the errors following the instructions contained in the hints that appear when you hover your mouse over the error. You can generate missing usernames and passwords. You will need to correct other errors manually
- If you have added a new group you will have to add an email address. Any group without an email will fail
- **Alternatively** you can *'Cancel'* the upload and try a different method. A list of all Excel errors and the actions to correct them are at the end of this guide.

Once all the errors are resolved:

- Click *'Upload these Users'*
- Once the users are successfully uploaded, you can print all the login slips by clicking on the *'Print or email Login Details'* button.

Groups

Clicking on the word 'Groups' will take you to a page where you can manage your groups. This includes adding users to groups, moving them between groups and deleting them from the groups.

What is a group for?

Groups can be created in CASCAID Manager to help you manage users. Groups allow you to organise users in the same way that you organise individuals within your organisation. Schools and colleges may want to add year, form or tutor group names. Other organisations may wish to name groups based on adviser case-load.

If you have a licence for Kudos Pathways: HE, we recommend that you add all users who will be going through the UCAS application process into one or more specific groups (see UCAS Feedback for more information).

Create a group

- Click the button in the top right hand of the page 'Create a group'.
- Type in the name of the group.
- Add a contact email address for the new group and click save.

The group name will be added to your list.

Find a group

- Sort the group grid alphabetically by clicking on 'Group Name'.

Add users to a group

- Click on the Group Name
- Click 'Add Users' (in the top right of the page)
- Find each user (see 'Find a user' on page 5)
- Tick the box to the left of the Username
- Repeat until you have selected all of the users that you want to add to the group
- Click 'Add x Users to this group' button.

Clicking on the word 'Groups' will take you to the page of your groups.

Add/Edit Email

- Tick the circle to the left of the Group Name you wish to edit/add the email address
- Click on the 'Update Email' button at the top of the screen
- Add or edit the email address in the box.

Change the name of a group

- Tick the circle on the left of the Group Name
- Click 'Rename'
- Type in the new name
- Click 'Save'.

Delete a group but keep the users

- Tick the circle on the left of the Group Name
- Click *'Delete'*
- Click *'Keep the users but delete the group'*.

The group name will disappear but the users will still be in View Users.

Delete a group and delete the users

- Tick the circle on the left of the Group Name
- Click *'Delete'*
- Click *'Delete the users and delete the group'*.

The group name will disappear and the users will no longer be able to access the products.

Reset the password for all the users in a group

- Tick the circle on the left of the Group Name
- Click *'Reset Passwords'*
- Type in the new password (this will be the same password for all users)
- Click *'Save'*.

Print or Email the login details for all the users in a group

- Tick the circle to the left of the Group Name
- Click *'Login details'*.

You will now be given a choice to...

Either

- Email Login details – this will send an email to the users in the selected group(s), containing their login details. You can also add a message to the email in the box below.

Or

- Download Login Slip(s) - login slips will open up in your browser, you will be able to save it or print it from there.

Print the user reports for all the users in a group

- Tick the circle on the left of the Group Name
- Click *'User Reports'*.

The report will open up in your browser, you will be able to save it or print it.

Add some of the users in this group to another group

This will keep the selected users in the group and add them to a second group.

- Click on the Group Name where the user currently is
- Tick the boxes to the left of the selected usernames
- Click *'Group Actions'*
- Choose *'Add to another group'*
- Select the group you wish the user to be added to and click add.

Add the users to a new group

- Tick the boxes on the left of the selected usernames
- Click *'Group Actions'* and select *'Add to another group'*
- Click *'Add to new Group'*
- Type in the name of the group
- Add a contact email address for the new group
- Click *'Add'*.

Move some of the users to another group

This will remove the selected users from the group and add them to a second group.

- Tick the boxes on the left of the selected usernames
- Click *'Group Actions'*
- Choose *'Move to another group'*.

Move the users to an existing group

- Click *'Add to Existing Group'*
- Select a group from the drop down list
- Click *'Add'*.

Move the users to a new group

- Click *'Add to a New Group'*
- Type in the name of the group
- Add a contact email address for the new group.

Remove some of the users from this group

This will just remove selected users from a group.

- Tick the boxes on the left of the selected username
- Click *'Group Actions'*
- Choose *'Remove from group'*
- Click *'Save'*.

Delete some users found in a group

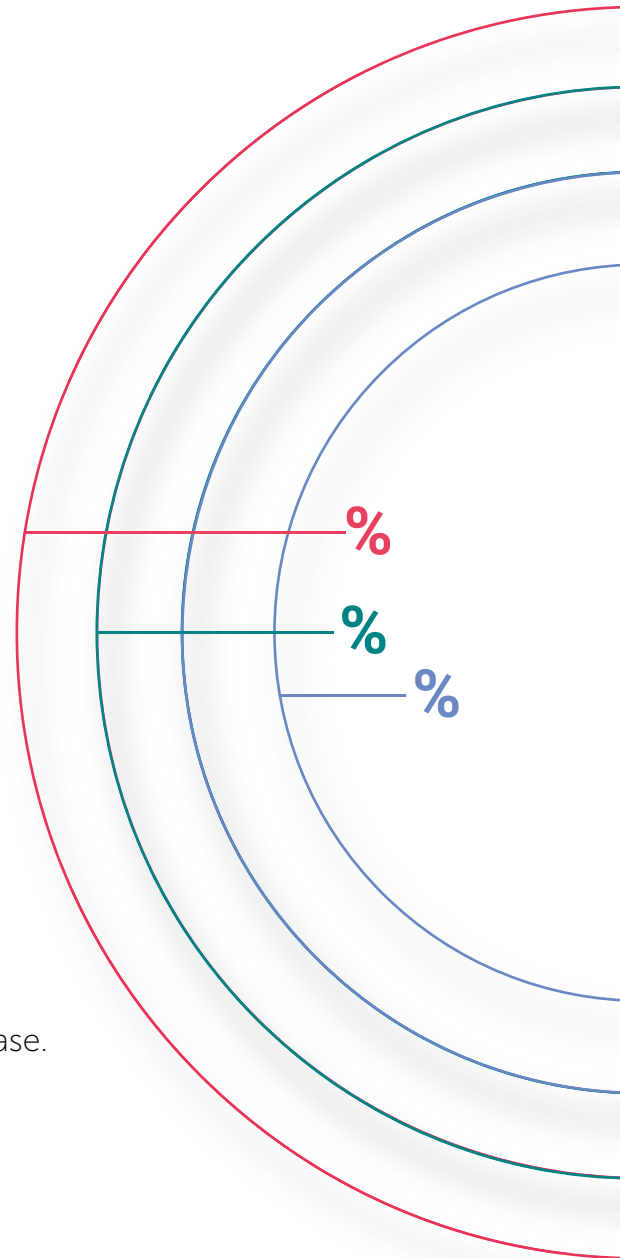
Important: This will delete the selected users from the database.

- Tick the boxes on the left of the selected username
- Click *'Delete'*
- Confirm *'Delete'*.

Reset the password for some of the users in a group

This will set the same password for the selected users.

- Tick the boxes to the left of the selected username
- Click *'Reset Password'*
- Type in the same password for all the selected users
- Click *'Save'*.



Print login slips for some of the users in a group

This will print the login slips for the selected users.

- Tick the boxes to the left of the selected username
- Click *'Login Details'*.

The page will open up in your browser, you will be able to save it or print it.

Print the user report for some of the users in a group

This will print the user report for the selected users.

- Tick the box to the left of the username
- Click *'User Reports'*
- Click *'Action Plan Reports'*
- Click *'Export User Data'*.

The report will open up in your browser, you will be able to save it or print it from there.

Resources

Clicking on the word *'Resources'* will take you to a page where you will find a list of helpful product resources, which you can download by clicking on the title.

Reports

The Reports feature allows you to view three different reports which will help you to give quick, personalised and accurate careers advice and guidance.

- Apprenticeship Report – this allows you to see how many apprenticeships are currently available in your selected area. You will also see what industry the apprenticeships are in, and so can give up-to-date information about the best place and best industry to find an apprenticeship.
- Management Report – this report enables you to view the progress made by a particular group of users. It reveals how many users (taken from your selected sample) have used the various features of Kudos, such as Action Plan Usage, CV Builder Usage, UCAS course favouriting, and the Personal Statement Builder usage.
- Logo customisation - With the option to personalise with your school/ organisation's logo, this high level report helps you to demonstrate the support you have in place and highlight any areas for improvement.

Settings

Launchpad subjects

If you have a licence for Launchpad, this is where you can hide the subjects that you do not want visible to Launchpad users.

- Remove the tick on all the subjects that you want to hide
- Click 'Save'.

Kudos HE user feedback

Kudos HE includes the facility for users to submit their UCAS Personal Statement and/or their UCAS Application Courses to their tutor/adviser for comment.

When this feature is set up, a relevant teacher/adviser will receive an email notification to let them know that a user has submitted a request for feedback.

In order for this feature to work:

- Each user needs to be in a group
- Each user needs an email address
- Each group needs to be linked to the email address of the person responsible for the group

Account details

This screen shows your organisation name, the main contact email, all your current licenses and all your previous licenses. If any of the information is incorrect please email enquiry@cascaid.co.uk or call **+44 (0) 1509 226868**.

Intranet links

This feature allows your organisation to place links on its Intranet or virtual learning environment (VLE), these allow your users to navigate directly to the CASCAID products that you are licensed for.

There are two links for each product:

- One link is for returning users where they can enter their username and password to login to the product.
- The other link is for new users to register without them needing to enter your organisation's licence code.

Terms and Conditions

The links must be placed within a secure website that is not publicly accessible. Each geographical location that provides access to the links must use the correct site licence.

By using the links, you will be legally agreeing to and be bound by the Terms and Conditions.

Once you accept the Terms and Conditions you'll be shown the HTML code that you need to create the links for each product. We recommend that you work with your IT department to get these links implemented.