Comprehensive Adult Student Assessment Systems

**CASAS** ®

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# Setting up Teacher Portal Access in TOPSpro Enterprise

## For Data Managers to set-up Teacher Portal access

1. **Please note only the designated TE Enhanced (Data Manager) can complete the steps below.**

2. If this is your agency's first time setting up Teacher Portal in TE, verify that your Access Control is *Access is granted based on roles (for Teacher Portal).* If not or you are unsure, contact Tech Support(techsupport@casas.org) and request to be switched to *Access is granted based on roles (for Teacher Portal).* Your Access Role/Group will be changed to *Access is granted based on roles (for Teacher Portal)* and you will have a *Data Manager Enhanced* role.



3. Next, determine the best Teacher Portal Access Control option for your agency. *Access is a granted based on roles (for Teacher Portal)* is a preset option that provides instant access without group access consideration. *Access is granted based on group and individual rights* will continue to use your custom groups at the agency level.

    a. Adding *Access is a granted based on roles (for Teacher Portal)*

        i. Go to **Organization > Users** and double click a user you want to add rights to. You will then change the *Access Control to Access is Granted based on roles (for Teacher Portal).* Then set the Role access you would like to give. Nothing needs to be set for Groups when using roles.
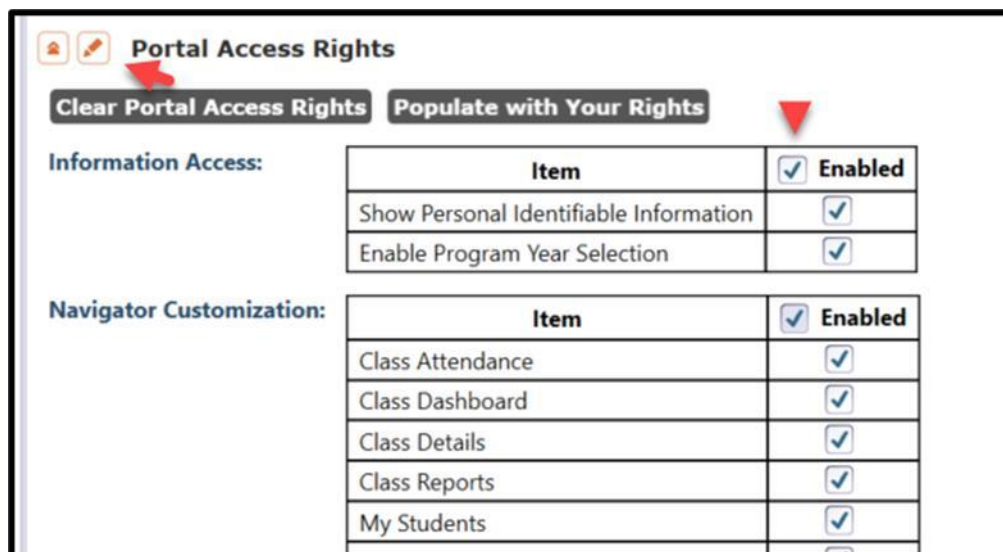
ii. To see what rights each role includes, create your own Teacher Portal account as a Data Manager and log into Teacher Portal to view the Access Roles.
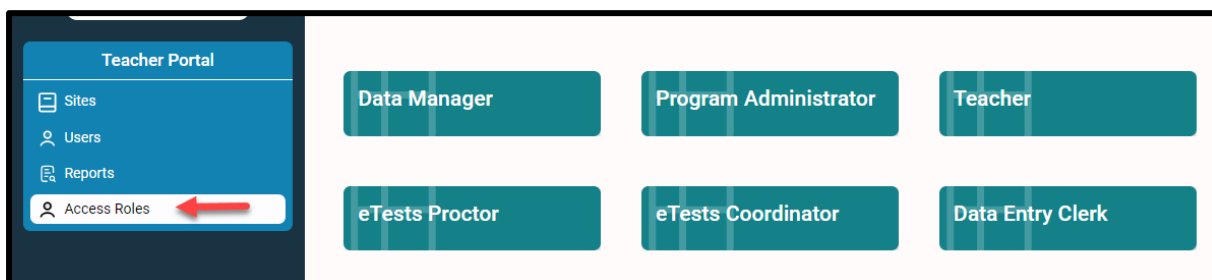


b. Adding *Access is granted based on group and individual rights*

    i. Go to **Organization** > **Access Groups** and double click access group you want to add Portal Access to.



c. For individual users, go to **Organization** > **Users** then select the user or create a new user.

    i. Click on the pencil icon next to **Portal Access Rights** to change to edit mode. Place check marks on the customizations and reports you would like to enable.

4. Confirm all users have a Teacher Role assigned to them. Users must have (i) approved Access Group and (ii) Teacher Role assigned to them in order to access Teacher Portal

5. Check for OR create a new Personnel Account linked to the user account in TE.

    a. If a Personnel Account already exists, check for the personnel account to be linked to the user account by clicking on **Associate Personnel with Another Active User**.



**Note:** If the user account does not appear under the pull-down list, this means that the user is already associated with an existing user. Proceed to step "d".

    b. Go to **Organization > Personnel > Registration** then click **New** in the top left.

    c. Check **Link with existing user** then select the user. After selecting the user, it will populate with the user information. If blank, type in a **Personnel ID** then click **Save** at the top.

d.  On the left under **Navigator**, click **Functional Roles** then select **New** to link the Personnel Record to a Class Definition.



e.  Select **Teacher** in the **Role Identification** - Functional Role then enter the **Start Date.**



f.  Click **Save** at the top.