

# Setting up Teacher Portal Access in TOPSpro Enterprise

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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.

**Access Control:**  Access is granted based on group and individual rights  
 Access is granted based on roles (for Teacher Portal)

**Password:**

**Retype Password:**

**Change Password...**

**Roles:**

Role	Level
Data Manager	Enhanced

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.

**User Identification**

**User Account:**

**Access Control:**  Access is granted based on group and individual rights  
 Access is granted based on roles (for Teacher Portal)

**Password:**

**Retype Password:**

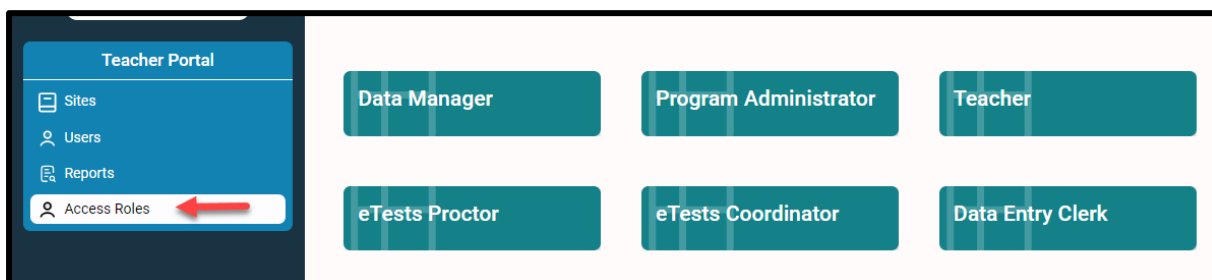
**Change Password...**

**Roles:**

Role	Level
Teacher	Enhanced

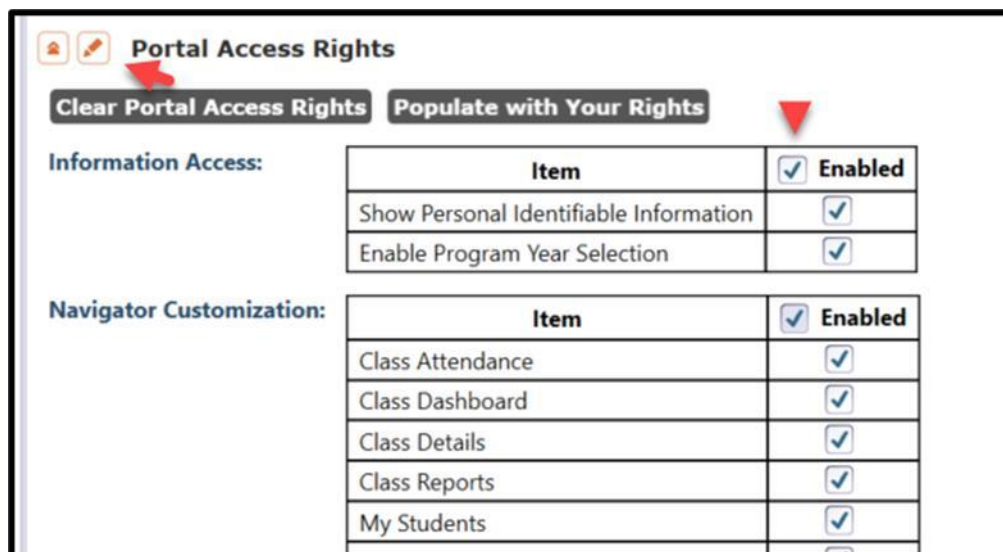
**Groups:** No groups selected.

- 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

**User Identification**

User Account:

Access Control:  Access is granted based on group and individual rights  
 Access is granted based on roles (for Teacher Portal)

Password:

Retype Password:

**Change Password...**

Roles:

Role	Level
Teacher	Basic

Groups:

Group Name
TE Teacher Access (Enhanced) [4908 - Rolling Hills Adult School (RHAS)]

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**.

**Personnel Information**

Container: [4908 - Rolling Hills Adult School \(RHAS\)](#)

Personnel: 10 - Casas Teacher

**Associate Personnel with Another Active User**

**Personnel Identification**

User Account: casasteacher@casas.org

Personnel ID: 10

Name: Casas Teacher

- 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.

**Select Container**

Link with existing user:

User: Container: 4908 - Rolling Hills Adult School (RHAS)  
User: casasteacher@casas.org - Casas Teacher

**Personnel Identification**

User Account: casasteacher@casas.org

Personnel ID: 10

Title: Last Name: Teacher Middle Name: First Name: Casas

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

**Navigator**

- Edit / View
- Functional Roles**
- Personnel Employment
- Professional Status

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

**Select Personnel**

Personnel: Container: 4908 - Rolling Hills Adult School (RHAS)  
Personnel: 10 - Casas Teacher

**Select container/associations for role**

Container: Container: 01 - RHAS: North Campus  
Class Definition: 020311 - FA21 - Adult Basic Education

**Role Identification**

Functional Role:  Teacher  Case Worker

Start Date: 7/1/2023

End Date:

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