

Instructions for adding users in Educator Portal manually

The following instructions are for adding a user in Educator Portal manually via the user interface. If you need to add multiple users, it may be faster to use the User Upload template found at <u>User Upload</u>

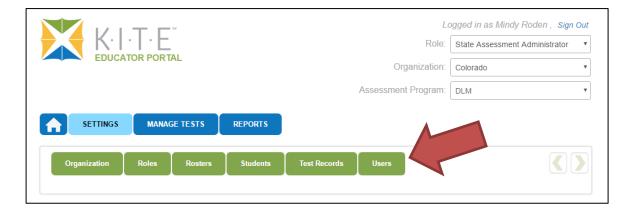
<u>Template</u>. Please see section Manage User Data in the <u>Data Management Manual</u> located at <u>DLM Data Management Manual</u> for specific directions.

Roles have changed for the 2016-17 year. Please see section Manage User Data in the *Data Management Manual* for a list of current roles and the level of permission within Educator Portal for each role.

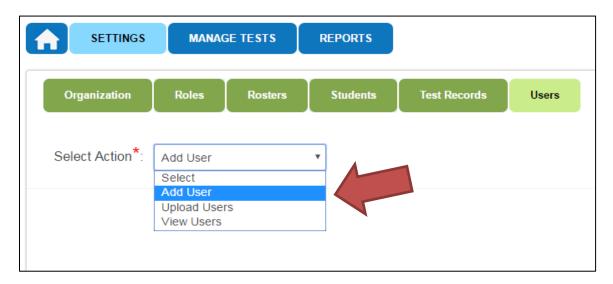


1. Select the "Settings" tab.

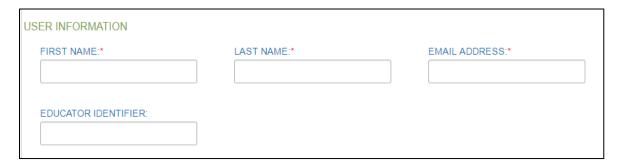




2. Select the "Users" tab.

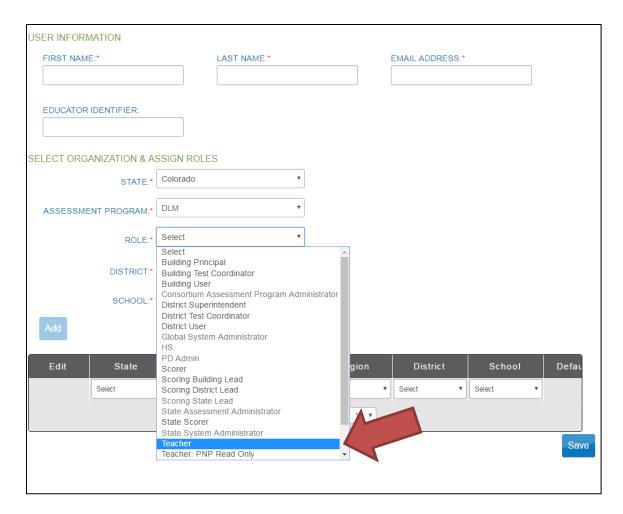


3. Select "Add User" from the drop down menu.



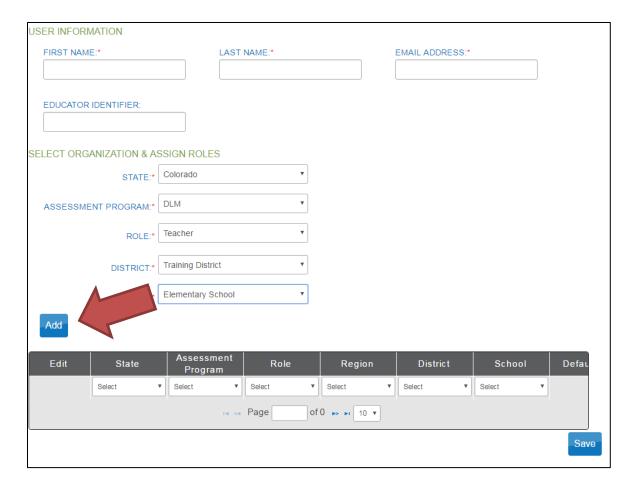
4. Complete the user's information. Use the district work email for the email address. CDE recommends that the user's email address be used to complete the Educator Identifier field.





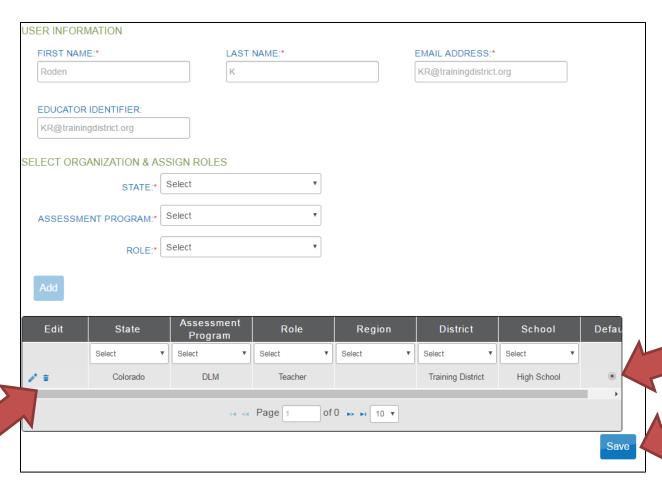
5. After entering the user's information, select the appropriate role. Most users will have the role of "teacher."





6. Complete the fields for district and school. Select the "add" button.





- 7. The user will appear in the list at the bottom of the screen. Check the information for accuracy. You can edit and/or delete the information at this point. If the user needs to be assigned to more than one school or needs more than one role, repeat the process and choose any necessary additional schools or roles.
- 8. For users with more than one role, click the radio button on the right to indicate the default role. For users with only one role, it will automatically fill.
- 9. Select "Save" before leaving the screen or the information will not be saved.







10. If a user already has an account with the same educator identifier or the same email address in Educator Portal, you cannot add the user to the system manually. You will need to list the user on the User Upload Template and upload the file to Educator Portal.

