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CHAPTER 1
Get Started

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PlusPortals Manager offers an intuitive administrative interface that enables administrators to easily manage and customize their school's teacher, parent, and student portals.

The seamless integration PlusPortals has with AdminPlus and TeacherPlus Gradebook makes it easy to set up user accounts and for information to be exchanged between the programs, such as demographic information, class progress, disciplinary incidents, class schedules, and other information aspects.

Who's this guide for?

This guide is meant to help your school's PlusPortals administrator set up the teacher, parent, and student portals. By using the Admin account, you'll learn how to set up user accounts; configure permissions; send e-mails, portal messages, and announcements; create events; create user Groups to give specific staff access to the portal pages of the users in the Group; and customize the look and feel of all the portals.

Will teachers, parents, and students get anything out of this guide?

This guide isn't meant for teachers, parents, or students. For more information on using the teacher portal, please refer to the TeacherPlus Portal User Guide. Parents and students who are looking to learn how to use the portals should check out our fun interactive guides on using the parent and student portals.
### 1.2 Manage Accounts

#### Manage Accounts by User Group

Upon logging in to PlusPortals with your administrator account, you can instantly choose which user group to manage.

When you click a user group option on the Manage Accounts page, the users for that particular group appear below the group option.

**Note:** User accounts are automatically synced from AdminPlus via the TeacherPlus Gradebook Sync Manager.

The user accounts for a particular group are based on the following:

**Student and Parent:** Student accounts are determined by a Data Base field in AdminPlus, which has been mapped as the e-mail field via the E-mail module. Your school can choose to populate the field either with the student’s e-mail address or a user name (in case an e-mail address is not available for the student). Similarly, parent accounts come from the primary e-mail field in the Contacts Data Base.

**Teacher/Staff:** Teacher user accounts are based on the active teacher accounts in TeacherPlus Gradebook Sync Manager in AdminPlus. TeacherPlus Gradebook and PlusPortals accounts share the same login and password, so the same login information can be used to access either account.

**Administrator:** Your master login of "plusportaladmin" is the master administrator account. You can easily create other administrator accounts via the Admin account management option.

#### What if the same user has two accounts?

Accounts that share the same login e-mail are automatically linked. The user can choose which role to log in as after entering his or her e-mail and password. As a result, a user with different roles (for example, teacher and parent) doesn't need two separate logins. Linking applies to any account role type, including the administrator role.

**Example**

Adam is a teacher and a parent, and he uses the same e-mail address for both accounts. When Adam logs in, he's prompted to choose to access either his teacher or parent account. At the end of the day, Adam doesn’t have to worry about remembering two different login e-mails for his accounts and can focus on being the awesome teacher and parent he is. Go, Adam!
Lock Accounts by User Group

Administrators can use the Manage Accounts page to lock user accounts. While locking accounts, you can create a message that will appear to users when they attempt to log in. With this feature, you can lock PlusPortals for any reason, such as for the summer, while personalizing your school's message to parents, students, or teachers.

To lock user accounts and create a message:

1. Click Manage Accounts on the navigation bar, and then click Settings.

2. For each user group you want to lock, click the Lock All [User] Accounts toggle to set it to Yes.

3. Customize the message in the Display the following message box for each group you have locked out of PlusPortals, and then click Save.

Note: To leave a user group unlocked, set the toggle to No.
1.3 Send Login Credentials to Users

When viewing a particular user group, you can quickly send an e-mail with login credentials to a particular user or all of the users belonging to the group. The e-mail template can be customized, and we recommend that you do so prior to sending users their login credentials.

**Customize the E-Mail Template**

1. Click **Setup** on the navigation bar, and then click **E-Mail Setup**.

2. Ensure **E-Mail Template** is set to **Login Credentials**.

3. Customize the **Subject** and the body of the e-mail to suit your school's preferences.

**Note:** In the Available Macros area, located to the right of the body of the e-mail, you'll find preset variables in brackets that you can copy and paste into the body of your e-mail template. The macros will automatically be populated with information custom to your school's PlusPortals when the e-mail is sent. For example, the [school.name] macro will automatically be substituted for your school's name. We recommend you don't make any changes to the macros found in the default e-mail template to simplify the customization process.

4. Click **Save**.

**Send Login Credentials to Users**

1. Click **Manage Accounts**, and then click the user group for which you wish to send login credentials.

2. Select the check box for the user(s) to whom the credentials will be sent.

3. Click **Send Login Credentials by E-Mail**.
1.4 Activate Single Sign-On (SSO)

Using PlusPortals’ Single Sign-On (SSO) feature, you can provide an added measure of convenience and security for your school’s online services. PlusPortals supports single sign-on interfacing for both Finalsite and FACTS Management. You can use the Setup menu to activate Single Sign-On. The Single Sign-On interface connects PlusPortals with Finalsite or FACTS so that you only need to log in to one to access both. The interface with Finalsite provides a link from Finalsite to PlusPortals. The interface with FACTS provides a link from PlusPortals to FACTS.

Finalsite Single Sign-On

Faculty, parents, and students can access PlusPortals directly from Finalsite. To set up Finalsite SSO, do the following:

1. Click Setup on the navigation bar, and then click Single Sign-On.

2. In the Single Sign-On from Finalsite box, select the Enable Single Sign-On from Finalsite check box.

3. Enter the Shared Key, and then click Save.

**Note:** We provide the Shared Key. You should use the same key for both Finalsite and PlusPortals.
FACTS Single Sign-On for Parents

Parents can access FACTS directly from PlusPortals. To set up Facts SSO, do the following:

1. Click **Setup** on the navigation bar, and then click **Single Sign-On**.

2. In the **Single Sign-On to FACTS** box, select the **Enable Single Sign-On to FACTS** check box.

3. Enter the **Institution Key**, the **Hash Algorithm**, and the **API Key**, and then click **Save**.

   **Note:** The **Institution Key**, **Hash Algorithm**, and **API Key** are provided by FACTS Management.

To activate the link to FACTS, do the following:

1. Click **Manage Accounts** on the navigation bar, and then click **Parents**.

2. In **Master Menu Customization**, select the **FACTS SSO** check box, and then click **Save**.

Parents can now access the FACTS website through a link in PlusPortals.
1.5 Create an Administrator Account

Although your master administrator login of "plusportalsadmin" is the main administrator account, you can create other administrator accounts from the Admin account management option.

1. Click **Manage Accounts** on the navigation bar.

2. Click the **Admin** account management option.

3. Click **Create New User**.

4. Enter the user information to be associated with the account.

   **Note:** If you create an Admin account with an e-mail already associated with another account in the system, you’ll be prompted to link the accounts. Linking accounts enables a user with more than one account role in the system to choose which role to log in as (upon first logging in with the e-mail address associated with both accounts).

5. Select the desired permissions for the Admin account being created. (To learn more about permissions, see the Permissions chapter.)

   **Tip:** We recommend you create your own admin account apart from "plusportalsadmin," so you can recover your own password in the future if needed.
1.6 Edit Profile

Using the Edit Profile page, you can change the demographic information for your PlusPortals administrator account. You can also set a custom e-mail signature to personalize your outgoing mail. Once set, your signature will be in the text editor whenever you begin to draft a new e-mail. You can return to the Edit Profile menu at any time to update all of your information from one accessible location.

**Edit Administrator Demographic Information**

To edit your demographic information, do the following:

1. Click **Edit Profile** on the page header.

2. On the **Edit Profile** page, click to edit any of the demographic boxes, and then click **Save**.

   **Note:** Only the **First Name** and **Last Name** boxes are required.
Edit Administrator E-Mail Signature

To edit your e-mail signature, do the following:

1. Click **Edit Profile** on the page header, and then click **E-Mail Signature**.

   Tip: You can also set your e-mail signature on the **New E-Mail** page.

2. Enter your signature into the **E-Mail Signature** text editor box, format your signature using the options in the text editor, and then click **Save**.
1.7 Customize the Appearance of PlusPortals

This topic gives a brief overview of how to customize the Login page, Logout page, Home page, and PlusPortals pages.

**Login Page Appearance**

To customize the Login page:

- Click Miscellaneous > Appearance > Login Page.

You can change the school banner and the color scheme of your login box.

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Tip:
When you click the **Background Color** options, you can enter your exact school color by typing the color code in the box.
How do I get News, Resources, and Events to show up on the Login page?

When you’re adding or editing an Announcement, a Calendar Event, or a Link/File, select **Show on Login Page (Public)**.

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**PlusPortals Page Appearance**

To customize the appearance of PlusPortals pages:

- Click **Miscellaneous > Appearance > PlusPortals Pages**.

Change the school banner and the color scheme of the portal pages. These branding customizations affect how the portal pages will look to logged in users. Be sure to click **Apply Theme** after you make those changes.
Home Page Appearance

Want to make your login page even better?

Transform your current PlusPortals login box from this...

![Old Login Box]

...to this!

![New Login Box]
How to Do It

1. Click **Miscellaneous > Appearance > PlusPortals Home Page**.

2. Select the information content boxes to be displayed, and then click **Apply Changes**.

![Diagram of PlusPortals Home page customization](Image)
Logout Page

You can customize the PlusPortals logout page URL to any site, such as your school's. With this feature you can direct parents, students, or teachers to useful information on your school website, such as school news or alerts.

To customize your PlusPortals logout page:

1. Click **Setup > General Settings**.
2. Enter the URL of your logout page into the **URL** box, and then click **Save**.
1.8 View Reports

As an administrator, it's important to have accessible contact and login information. On the Reports screen, you can easily access parent and student contact information as well as parent, student, teacher, or administrator login information.

Generate a Report of Users and Their Login Status

1. On the main navigation bar, click Miscellaneous, and then click Reports/Statistics.

2. In the leftmost pane, click User List to generate a report of users and their login status.

3. Click Logged In to generate a report of users and the last time they logged in, or Click Not Logged In to generate a report of users who are not logged in to a portal.

4. Do one of the following:

   - If you clicked Logged In, set the dates you want to view in your report and select which type of user report you want to generate.

   ![Logged In Report](image)

   - If you clicked Not Logged In, click Parents, Students, Teachers, or Admin, depending on which type of user report you want to generate.

   ![Not Logged In Report](image)

5. Click Generate Report.
Generate a Report of Students and Their Contact Information

1. On the main navigation bar, click Miscellaneous, and then click Reports/Statistics.

2. In the leftmost pane, click Student List with Contacts to generate a report of students and their contact information.

3. Do one of the following:
   - Click All to display all students.
   - Click Grade Level to display students based on grade level.

4. Click Generate Report.
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CHAPTER 2
Permissions

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2.1 Manage Portfolio Categories

After syncing portfolio items with PlusPortals in AdminPlus, you can choose which portfolio categories to display or hide by using the admin portal. For more information on syncing portfolio items with PlusPortals in AdminPlus, see the topic Sync Portfolio Items to PlusPortals.

1. In the admin portal, click Setup, and click Portfolio Categories.

2. Select the check box(es) next to the desired categories. The following figure illustrates steps 2–5.

![Portfolio Categories]

3. Optional: In the Portal Display Name column, customize how the category name appears in the Portals.

4. Select the Show portfolio documents not belonging to any of the above categories check box to show any documents in other categories that don’t appear in step 2.

5. Click Save.
2.2 Customize Summary Permissions

Customizing the Permissions area is one of the most important aspects of managing your school's PlusPortals. You can customize what each type of user can or cannot view to further meet your school's needs. Summary permissions refer to general permissions, such as what kind of information is displayed on the Home page.

To access Summary permissions:

- Click Permissions on the navigation bar, and then click Summary.

**Warning:** After customizing any summary permissions, remember to click Save Settings at the bottom of the page; otherwise, all of your configurations will be lost when you exit the page.

Home Page View Settings: Permissions and Visibility Settings

Permissions and Visibility Settings determine what parents, students, and teachers can view on their Home page after they log in to the portals. Using the available check boxes, you can control visibility settings corresponding to school notifications/alerts, calendar, announcements, link and file postings. These postings appear in their respective panels on the Home page.
Password Management

If you would like to prevent a user group from changing their password, select the check box next to [User]'s cannot change password. Select the check box next to each user group for which you would like to disable password management permissions.

Directory

Directory permissions enable you to manage which users appear in the directory. Selecting Opt-In shows all parents and students in the directory by default. To hide their information, they must opt-out on their portal’s Directory Listing page. Alternatively, selecting Opt-Out hides all parents and students from the directory by default. To show their information, they must opt-in on their portal’s Directory Listing page. You can also choose whether to display non-teaching staff in the directory.

Quarter Ending Dates

Students’ courses appear in the portals based on the quarter ending dates you set in this area. You can choose to display courses from the current and previous quarters. There is also an option to include Period Attendance from selected quarters.
Period Attendance Legend

Customize how attendance codes and descriptions appear in PlusPortals. Add your custom codes and descriptions to the **Display Code As** and **Display Description As** columns. Select the check box in the **Visible** column to display the customized information, or clear the check box to hide the information.

Student/Teacher Schedule

Choose whether to show student schedule rotations to parents and students, which rotations to show, and edit the rotation label/heading.
Report Card Settings for Parents and Students

Choose which Report Card columns are visible to Parents and Students. Change it as the year goes along when you’re ready to share those marking period grades. You can also select which grade levels you want these columns to be visible to. In addition, control the viewing of Skills, Narratives, and GPA settings from AdminPlus.

Progress Box, Scores and Progress Settings for Parents and Students

Choose the marking period and exam columns as well as the grade levels parents and students can view progress for. Grades and averages come from teachers’ gradebooks. Additional options include allowing parents and students to view Average and Grade columns, category averages, and progress reports.
Skills View for Parents and Students

Customize which information you display on the Scores tab regarding skills, the learning goals assigned to a class. You may select **Show Summary View, Show Detailed View**, or both. Summary view provides parents and students with a skill description and a grade. Detailed view displays a description and the category columns chosen by an administrator.

**Note:** To enable Detailed view, teachers must link skills to assignment columns in TeacherPlus Gradebook. For more information on linking skills to assignments, see the Add a New Assignment section of the Add or Remove a Score Column topic.

![Skills View for Parents and Students (Scores tab)](image)

Show Standards Live Report

Customize what information is displayed to parents and students in the Standards Live Report, located on the Reports tab. You can choose a combination of categories.

![Show Standards Live Report (Report tab)](image)
Report Card/Scores Restriction List Settings

This is a restriction list feature. Select parents and students for this list if you need or want to block their access to progress, grades, and report cards for various reasons. When a parent or student logs in, he or she will see the following message: “Your account has been restricted. Please contact your school's administration for more information.” You may also decide to customize the default message to suit your school's needs. Once you remove them from this list, the users will regain access.

Incidents

Set the on-or-after date to show students' disciplinary incidents.

Section Meeting Time

If you would like to hide section meeting times to any user group, clear the check boxes in this area.
Homework Sorting Options

There are three homework sorting options available: The first option enables you to always show the current month’s homework at the top. The homework will be sorted by due date. Students can scroll down to see all of the current month’s homework assignments.

The second option is to sort homework by due date in descending order. This option causes the homework that is past its due date to go to the bottom of the homework list, so the newest homework is always at the top of the list.

The third option is to sort homework by due date in descending order with the current day due at the top. This option enables you to show the most current due date at the top with the most recent past due dates following in chronological order.

Section Visibility

The check box option **Allow teachers to select parent/student visibility for their courses** gives teachers the flexibility to choose which courses to display to parents and students as well as to edit the course display name. The course display name doesn’t change the core course name/title but simply changes how the name is displayed on the parent and student portals. Optionally, you can opt not to give teachers permission to change the course display name for parents and students and simply change the display name yourself.

Microsoft OneDrive School (Business) Accessibility Settings in E-Locker

If a parent or student wants to access OneDrive School to attach files, he or she can do so by clicking **Upload** in Homework Hand-in. Enable OneDrive School accessibility in parent and student portals by selecting the check box next to **Allow parents and students to sign in to OneDrive using their work or school account to attach files to homework**.
2.3 Customize Parent and Student Permissions

Parents and students have identical permission options, but each user group has its permission page to enable your school to customize different visibility settings for parents and students.

To access parent or student permissions:

- Click **Permissions** on the navigation bar, then click **Parents** or **Students**.

Customize the Master and Section Menus

In the **Master Menu Customization** area (Figure 1), choose which menu options are available to parents or students on the Master menu (Figure 2), including Calendar, E-Mail, E-Locker, School Announcements, and School Directory. In addition, select which options to display on the Section menu (Figure 2).

![Master Menu Customization](image1)

**Figure 1**: Master Menu Customization

![Parent and Student Portal Navigation Menus](image2)

**Figure 2**: Parent and Student Portal Navigation Menus
Directory

The built-in information directory feature is a powerful tool that can be customized differently for parents, students, and teachers (each group having its own settings).

By default, a parent's information won’t be shown in the directory to other parents and students (but it will for teachers). To change these default settings, the following has to be done:

- In the Directory permissions area, the portal manager has to select to show the parent directory as well as select which information fields to display.

- The parents also need to select to share their information in the directory as well as which information fields they would like to share (both done from their parent portal).

In the Directory area, you can also choose to show the teacher and student directories to parents and students.

Note: Remember that teachers see all parents by default in the parent directory unless you customize the settings otherwise.
Attendance

Choose to show period and/or daily attendance to your parents and students.

Demographics

Enable parents and/or students to view and/or edit student demographic information from their respective portals. Any demographic information edited by parents and students from the portal is sent to the PlusPortals Holding Bin in AdminPlus for review before changes are made to permanent records. This feature allows your school to review all edited information for accuracy before any changes are officially made.

Note: If you need more demographic fields than what currently appears in the Demographics area, choose additional fields in the TeacherPlus Gradebook Sync Manager, and then select additional demographic fields to be synced. Then, you can select more fields in the Demographics area to make available for parents and students to edit.
2.4 Customize Teacher Permissions

Teachers have a unique set of permissions that allows for greater information access (when such permissions are enabled).

To access teacher permissions:

- Click **Permissions** on the navigation bar, and then click **Teachers**.

Customize the Master and Section Menus

In the **Master Menu Customization** area (Figure 1), you can give teachers access to the following options for the Master menu on their portal (Figure 2): Gradebook, Calendar, School Announcements, E-Mail, Messages, E-Locker (homework retrieval), E-Portfolio, Course Requests, Forms, Directory, and Schedule. Similar Master menu options are available for non-teaching staff members. Using **Master Menu Customization**, you can also select which Section menu items are visible to teachers on class pages.

![Figure 1: Master Menu Customization](image1)

![Figure 2: TeacherPlus Portal Navigation Menus](image2)
Student Section Menu

In the **Student Tab** area, select from various Section menu options to be displayed when a teacher selects one of their students, including Progress, Recent Scores, Attendance Totals, Incidents, Schedule, Demographics, and Contacts.

![Student Tab](image)

**Give Teachers Access to Scores**

In the **Score Tab** area, you can grant teachers access to students’ exams as well as semester and final averages.

![Scores Tab](image)

**Directory**

Permissions for the teacher directory are similar to those of the parent and student directories. For more information, see the Directory section in the topic [Parent and Student Permissions](#).

**Incidents**

Choose to allow teachers to view all students’ disciplinary incidents or just the incidents submitted by each individual teacher. You also have the option to enable teachers to submit incidents from PlusPortals. The incidents are sent to the AdminPlus Discipline Holding Bin, from which they can be reviewed to be made official on students’ records.

![Incidents](image)
Demographics
Select which demographic fields a teacher can view for any given student.

Allow Teachers to Create Calendar Event Categories
In the Calendar area, you can enable teachers to create event categories, such as sporting events, assemblies, or standardized testing. These categories visually organize the calendar.
2.5 Receive PlusPortals Demographic Changes in AdminPlus

The portal administrator can choose to give parents and/or students permission to view and/or edit student demographic information from their respective portals. Once demographic information is edited, the changes are sent to the AdminPlus Holding Bin, from which they must be received/approved before they become permanent. This topic shows you how to receive the changes in AdminPlus.

1. On the Home screen in AdminPlus, click the Holding Bin icon, click PlusPortals, and then click Next.

2. Review all the data that has been submitted and select the check box for each entry you wish to receive into AdminPlus.

   **Note:** If there's an entry you don't want to receive, select only the unwanted entries, and then click Delete All Selected Changes.

3. Upon selecting the entries to be received, click Save All Selected Changes.
CHAPTER 3

Communication

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3.1 E-Mails vs. Messages

PlusPortals offers two methods of communication: e-mails and messages. Whereas e-mails can be a means of communicating inside and outside of PlusPortals, messages are confined to the portals alone. This topic explores the difference between these two methods in more detail.

**Portal E-Mail**

To access the e-mails and messages:

- Click **Communication**, and then click **E-Mails & Messages**.

A portal e-mail is a full-fledged e-mail and is delivered to a user’s personal e-mail inbox as well as their portal inbox. This is the preferred method of sending e-mails out of the portals, as it ensures the highest level of communication and deliverability. One of the great advantages of this communication method is that it’s less likely that a teacher, parent, or student will miss the e-mail. In addition, there are notification icons that will indicate to a user that he or she has new or unread messages. Unlimited cloud-based e-mail comes with your portal subscription, allowing everyone at your school to e-mail anyone and take advantage of what the portal e-mail feature has to offer.

As a general guideline, administrators can e-mail anyone in the school, teachers can e-mail the students and their parents, parents can e-mail the teachers of their children, and students can e-mail teachers. There are, of course, exceptions to this guideline, such as e-mailing via a group.

**Messages**

Messages are similar to e-mails, except users will have to retrieve these messages in the portal itself. As a result, messages are designed for communicating within the portals. They’re designed for communicating with users who don’t necessarily have an e-mail. An example would be a teacher e-mailing a class of students who do not yet have e-mails but who log in to the portals with a user name.

Administrators can only broadcast a general message to selected user groups, but teachers have a message editor and can message individual users. For more information, see the TeacherPlus Portal User Guide.
3.2 Send an E-Mail

A portal e-mail is a fully-fledged e-mail and is delivered to a user’s personal e-mail inbox as well as their portal inbox.

1. Click **Communication** on the navigation bar, and then click **E-Mails and Messages**.

2. Click **New E-Mail**.

3. In the **To** box, click **Add Recipients**.

   **Note:** For privacy reasons, any e-mails added to the **To** box will not be visible to any of the users receiving that e-mail correspondence.

4. Select the user(s) the e-mail will be sent to, and click **Next**.

   **Note:** If sending an e-mail to students and/or parents, you can select students by grade level, individual students, or all students.

5. Confirm your selection by clicking **OK**. If you select users who don’t have an e-mail address, PlusPortals will let you know who these users are before you click **OK**.

6. To fill out the **Cc** and **Bcc** boxes, click **Add Recipients**, and repeat steps 3, 4, and 5.

7. To attach a file, click **Attach Files From**, and select the file from your computer.

8. Fill out the **Subject** box and body. Format your e-mail using the options in text editor.
9. Do one of the following:

- Click **Send** to deliver the e-mail.

  **Note:** A record of the e-mail is saved to the Sent Items folder.

- Click **Save** to save a draft of the e-mail for later editing.

**Note:** The e-mail interface is the same for other users, but the process of sending an e-mail is even easier for them when it comes to adding recipients. For example, teachers select users by sections instead of grade levels.
Create an E-Mail Signature

You can set a custom e-mail signature to personalize your outgoing mail. Once set, your signature will be in the text editor whenever you begin to draft a new e-mail.

To create an e-mail signature:

1. On the New E-Mail page, click E-Mail Signature below the e-mail text editor box.

   **Tip:** You can also set your e-mail signature on the Edit Profile page.

2. Enter your signature into the E-Mail Signature text editor box, format your signature using the options in the text editor, and then click Save.
3.3 E-Mail Analytics

Using PlusPortals' built-in E-Mail Analytics tools, you can observe how users interact with your school's e-mails. This information can help administrators establish effective communication strategies and maintain contact with students, parents, and teachers. For example, you can identify e-mails that aren't reaching the intended recipient, look up the reason they weren't delivered, and fix these issues to keep an up-to-date and accurate mailing list.

**Note:** E-Mail Analytics data represent information received from users' external e-mail service providers. This data does not include information from PlusPortals' internal e-mail, so actions performed by recipients within PlusPortals are not reflected in the Statistics tab, the Activity Feed, or the Suppressions tab. Keep this mind when analyzing user engagement with e-mails.

Access E-Mail Analytics

**Note:** The plusportaladmin is the only account with default access to E-Mail Analytics. Use this account to authorize other admin users. For more information, see "Set E-Mail Analytics Permissions" below.

To navigate to the E-Mail Analytics page, do the following:

1. On the main navigation bar, click Miscellaneous, and then click E-Mail Analytics. The Statistics tab opens by default.
2. Do any of the following:
   - Stay on the Statistics tab.
   - Click Activity Feed.
   - Click Suppressions.

Set E-Mail Analytics Permissions

To enable an admin user to access E-Mail Analytics, do the following:

1. On the main navigation bar, click Manage Accounts, and then click Admin.
2. Click next to the admin user account.
3. On the Update User page, under Permissions, locate the Miscellaneous group box.
4. Select the check box next to E-Mail Analytics and then click Update User.
On the Statistics tab, you can see an overview of the status of e-mails sent from PlusPortals for a selected date range. Events represent the status of these e-mails.

The **Events** included in this overview are:

- **Delivered**: The number of e-mails delivered to users.
- **Opens**: The number of e-mails opened by users.

**Note:** The number of Opens can exceed Delivered e-mails when users open e-mails more than once, or when they open e-mails that were delivered before the date range.

- **Clicks**: The number of link clicks within e-mails.
- **Bounces**: The number of e-mails that were not delivered to a user.

**Note:** The Bounces statistic includes Dropped e-mails and Deferred e-mails until they are delivered. Dropped e-mails that can't be sent to the intended recipient, Deferred e-mails can be sent but can't be delivered. When an e-mail is Deferred PlusPortals will try to send it again. E-mails can be Dropped if the address is invalid. They can be Deferred if the intended recipient's mailbox is full.

- **Spam Reports**: The number of e-mails that users marked as spam.

To configure the **Statistics** tab, do the following:

1. On the Statistics tab, locate the Events group box, and select the check boxes of the events you want to view.

2. In Date Range, set the Start Date and End Date, or leave the default dates.

**Note:** The default date range is the beginning of the month to the current date.

3. Under the graph’s plot area, set the x-axis interval by selecting Days, Weeks, or Months.
Activity Feed

On the Activity Feed tab, you can access the e-mails sent from PlusPortals for a selected date range. You can then view the intended recipients and the status of the e-mail for each recipient.

To configure the Activity Feed, do any of the following:

- In the Search by box, select E-Mail Subject or Recipient and enter a search term.
- In the Date Range box, set the Start Date and End Date, or leave the default dates.
- Filter by Subject, Date, or Sender.

To access more information regarding the recipients of an e-mail, do the following:

1. Click next to the e-mail you want to access.
   
   The E-Mail Statistics dialog box opens, listing the recipients of the e-mail.

2. Search by e-mail address or filter by Event Type, E-Mail Address, or the Date of the most recent event.

   **Note:** Event Type refers to the status of the e-mail, such as Delivered, Opened, Clicked, Bounced and Dropped.

3. For Dropped e-mails, point to to display the reason that the e-mail wasn't delivered to this e-mail address.

   **Note:** When an e-mail is Deferred PlusPortals will try to send it again.
Suppressions

On the Suppressions tab, you can access all undelivered e-mails for a selected date range in one location. You can then view the intended recipient of an undelivered e-mail and the reason why it wasn’t delivered.

To configure the Suppressions tab, do any of the following:

- **Search by E-Mail Address.**
- In the **Date Range** box, set the **Start Date** and **End Date**, or leave the default dates.
- Filter by **Event Type**, **E-Mail Address**, **Date**, or **Event Summary**.
- Point to ☰ to display e-mail details, such as the **Subject** and the **Sender**.

**Note:** If you need to remove a bounced e-mail please e-mail us at portalsupport@rediker.com. A historical record of this bounce still appears after the bounced address has been removed.
3.4 School Announcements, Notifications, and Alerts

There are a few options for mass communication in PlusPortals, including Announcements, Notifications, and Alerts. To begin using these options, access the School Announcements page, found in the Communication menu.

Announcements

To create a new announcement on the Announcements page, do the following:

1. Click Announcements.
2. Click Create on the right side of the page.
3. Fill out the Title and Description of the Announcement, and choose the dates you want the announcement to be shown to users.
4. Do any of the following:
   - Select which user groups you want to show the announcement to and whether or not to show the announcement on the Login page. (For more details about the Login page, see the topic Customize the Appearance of PlusPortals.)
   - Attach a file or add a link.
   - Select the check box Send E-Mail Notification to send an immediate e-mail notice to the selected user groups.

Notifications and Alerts

Notification and Alerts are similar in that they both appear in the same panel on the Home page. The main difference is that Alerts appear in red.
The process of creating a Notification or Alert is similar to that of creating an Announcement. You can set a date for when the Notification/Alert is visible, select which user groups can see it, attach a file, add a link, and choose to send an immediate e-mail notification.

**Settings**

Set the sort order on how Announcements, Notifications, and Alerts display to your users.

**What's the difference between Announcements, Notifications, and Alerts?**

Notifications and Alerts are essentially the same, but Alerts show in red, connoting higher importance. Alerts also tend to be shorter, such as in the event of a snow day. Announcements have an area for a longer description and usually detail something more specific. Notifications and Alerts tend to be shorter notices and display in different panels on the Home page. Remember that you can turn any of these modes of communication off in the Home page permissions section if you choose not to use them.
3.5 Create a Calendar Event

Create a New Event

Using the Calendar feature, you can broadcast school-wide events through PlusPortals. When you create a new calendar event you can set an event summary, location, and category as well as add resources, such as links and attachments. You can use this functionality to create informative event listings.

1. Click **Communication** on the navigation bar, click **Calendar**, and then click **New Event**. The **Event** dialog box opens.

   **Note:** To edit an existing event or delete an event, click **Manage Events**.

2. Fill out the **Title**, **Summary**, and **Location** boxes.

3. Next to **Visible To** select the check box next to any user groups you want to display the event to.

   **Tip:** To display a calendar event on the login page select **Show on Login Page (Public)**, set the PlusPortals Login Page to the Home Page, and customize it to include an Events content box. For more information see "Customize the Appearance of PlusPortals" on page 15.
4. In the **Start Date** and **End Date** boxes, set both the date and the time. To set only the date, select the **All Day Event** check box.

   **Tip:** You can also use the calendar to set the date and the clock to set the time. The clock drop-down list provides the time in 30-minute increments.

5. Next to **Select Category**, do either of the following:
   - Select an existing category from the **Select Category** drop-down list.
   - Create a new category by clicking **New**, setting the category name and color, and clicking **Save**.

   **Note:** For more information on event categories, see "Manage Calendar Event Categories" on page 53.

6. Do any of the following:
   - To create a recurring event, select the frequency from the **Repeat** drop-down list.
   - To provide event resources, attach a file or add a link.
   - To notify users about the event, select **Send E-Mail Notification**.

7. Click **Save** to post this event to the calendar, where users can click it to view more information.
8. If you selected the **Send E-Mail Notification** check box in step 6, a dialog box appears after you save the event. To send this e-mail, select the check boxes next to the user groups you want to notify, and then click **Send**. You can also choose to edit the **Subject** and **Description**.

**Example**

PlusPortals fills out the **Send E-Mail Notification** dialog box using the information you added to the new calendar event, as shown in the figure below. You can use the default e-mail, or you can customize the **Subject**, the **Description**, and the user groups that you want to notify. You can also use the **Description** text box to format the e-mail with custom fonts, styles, images, and other options.
Manage Calendar Event Categories

Event categories communicate information about event type at a glance. You can create any type of event category to organize your school calendar events (for example, creating a "Field Trip" category). You and other users can then quickly filter events on the calendar by selecting a specific category.

Event category management usually takes place when you create a calendar event; however, you can manage calendar event categories for other administrators or teachers without creating an event. To achieve this, you can edit event categories in the Event dialog box, save them, and then close the dialog box. The changes you make will still be applied to the affected event categories.

To manage calendar event categories, do the following:

1. Click Communication on the navigation bar, click Calendar, and then click New Event.

2. In the Event dialog box, locate Select Category, and complete any of the following options:

   - **Option 1: Create a new category:**
     1. Next to Select Category, click New.
     2. In the Add Calendar Category dialog box, customize the Category name, pick a color, and then click Save.

       **Note:** To allow teachers to use the category you create, select the Allow Teachers to use this category check box.

   - **Option 2: Edit an existing category:**
     1. Select the category from the drop-down list, and then click Edit.
     2. In the Edit Calendar Category dialog box, edit the category name, color, and teacher access, and then click Save.

   - **Option 3: Delete an existing category:**
     1. Select the category from the drop-down list, and then click Delete.
     2. Back in the Event dialog box, click Cancel to exit without creating an event.
Calendar Feed

You can manage PlusPortals calendar events through Google Calendars in addition to standard management options. Administrators can sign in to their Google account, choose which calendars to display in PlusPortals, and choose how to display those calendars.

1. Click **Communication** on the navigation bar, click **Calendar**, and then click **Calendar Feed**.

2. Click **Sign in with Google**, and follow Google's prompts to sign in to Google Calendar.

3. Once you’re signed in, click **Edit** next to the calendar you would like to manage.

4. Enter the calendar **Start Date** and **End Date**.

5. Select a calendar color from the **Color** drop-down list, and then click **Apply**.

6. Choose whether to **Show on Login Page**, and select which user groups can view the calendar.

7. Click **Update** to save the calendar settings.
3.6 Add School Resources

In addition to being able to attach files to announcements, e-mails, and calendar events, you can also post dedicated files and links for your school and adjust the visibility by type of user on the School Resources page. Using the Add from Library feature, you can also add links or files that you've previously added to the portal.

Add a New Link

1. Click Communication on the navigation bar, and then click School Resources.

2. Click Add New in the Links panel to add a new link.

3. Add a Description, a Link Name, and a URL.

4. Do one of the following:
   - Select an existing folder from the drop-down list.
   - Create a new folder by clicking New, and then click the folder you created from the drop-down list.

5. Select the Show on Login Page (Public) check box if you want to display this link on the public login page.

6. Select the check boxes next to the users who you want to be able to see this link.

7. Optional: Select the Send E-Mail Notification check box to send an e-mail notification with the link to the users you previously selected.

8. Click Save.
Add a Link from Library

1. Click **Add from Library** in the **Links** panel to add a previously uploaded link.
2. Select the check box next to the link you want to add.
3. Click **Next**.

   ![Image showing the PlusPortals dialog box with links and checkboxes]

   **Note:** You can select multiple links from the library at one time by selecting multiple check boxes.

Add a New File

1. Click **Communication** on the navigation bar, and then click **School Resources**.
2. Click **Add New** in the **Files** panel to add a new file.
3. Add a **Description** in the **PlusPortals** dialog box.
4. Click **Select Files...** to browse your computer and select a file to upload.
5. Do one of the following:
   - Select an existing folder from the drop-down list.
   - Create a new folder by clicking **New**, and then click the folder you created from the drop-down list.
6. Select the **Show on Login Page (Public)** check box to display this file on the public login page.
7. To edit the file visibility, select the check box next to a user type to allow visibility to this file.
8. Optional: Select the **Send E-Mail Notification** check box to send an e-mail notification with the file to the users you previously selected.
9. Click **Save**.

![Image of file upload form]

**Note:** You can post files of up to 50 MB in size.

---

**Add a File from Library**

1. Click **Add from Library** in the **Files** panel to add a previously uploaded file.

2. Select the check box next to the file you want to add.

3. Click **Next**.

![Image of file library]

**Note:** You can select multiple files from the library at one time by selecting multiple check boxes.
3.7 Configure Automated Notifications for Parents and Students

Your school can enable automated notifications for students and parents and give them the flexibility to choose how frequently they want to receive the notifications (daily, weekly, biweekly, monthly, or every x days). In the Communication section of the admin portal, you can grant this permission and set the week day when the notification will be sent, based on which preference the students and parents use. For instance, if they choose to receive notifications only weekly, you can set which day of the week the notification is to be sent on every week, such as on Mondays.

1. Click **Communication** on the navigation bar, and then click **Automated Notifications**.

![PlusPortals](image)

2. For the option **Enable automated notification E-Mails to Parents and Students**, do one of the following:
   - Click **Yes** to enable automated notifications and grant students and parents permission to change how frequently they want to receive automated notifications.
   - Click **No** if you want to disable automated notifications altogether.

![Automated Notifications](image)

3. For the option **Weekly (Send E-Mail notifications on every)**, select the week day for when the automated notifications will be sent to students and parents when they’ve selected to receive the notifications weekly only.

![Weekly](image)
4. For the option **Every Two Weeks (Send E-Mail notifications on every other)**, select the week day when students and parents will receive automated notifications biweekly.

   ![Image](4)

5. Do one of the following for the **Monthly** option:

   - Click **Day**, and then select a specific day number in the month when automated notifications should be sent. If students and parents select to receive automated notifications only once a month, the day you select for this option is the day the notifications will be sent to them.

   - Using the last two drop-down list options, select whether you want monthly notifications to be sent on the first, second, third, fourth, or last day of a given week day.

6. Click **Save** to finalize your changes.

   **Tip:** You can customize the subject and message body of automated notification e-mails by modifying the **Automated Notifications** template. To edit the template in the admin portal, click **Setup > E-Mail Setup**, and then click **Automated Notifications** from the **E-Mail Template** drop-down list.
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CHAPTER 4

Unit Builder

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4.1 Manage Units

Using the Unit Builder, administrators can manage units for the Lesson Planner. Using the Lesson Planner, teachers can customize lessons for these units. This interaction results in a collaborative process for planning curriculum and helping students achieve learning goals.

When creating a unit, you can do the following:

- Create a unit name.
- Assign the unit to any number of classes.
- Set the date range for the unit.
- Add teaching resources for the unit.

Once you have units in the unit builder, you can edit existing units, copy content from one unit to another, or delete units.

Create a New Unit

1. On the main navigation bar, click **Setup > Unit Builder**.

2. Click **Add a Unit** in the upper-right corner of the **Unit Builder**.

3. Click the **Unit Name** box highlighted in red, and enter a unit name.

   **Note:** The name can be up to 200 characters. If the whole name can’t fit into the **Unit Name** box, an information icon appears at the end of the box. Point to the icon to access this information. The information icon will also appear if a unit was created or edited by a teacher.

4. Next to the new unit name, click **Assign**.
5. In the **Assign Unit To Classes** dialog box, do either of the following:
   - Select the **Course** option to display courses in the **Available** column.
   - Select the **Section** option to display course sections in the **Available** column.

6. In the **Available** column, select the course(s) or section(s) that you want to assign to the unit.
   
   **Tip:** You can hold the Ctrl or Shift key and click to select multiple courses or sections. You can also select one course or section, hold the Shift key, and then click any course or section below the first to select these courses and every course in-between.

7. Click to move courses or sections to the **Selected** column.
   
   **Tip:** You can also click to move all courses and sections to the **Selected** column.

8. When every course or section for the unit you're creating is in the **Selected** column, click **Done**.

9. Enter the **Start Date** and the **End Date** for the unit by clicking the calendar and selecting the date or by clicking the date box and typing the date (mm/dd/yyyy).
   
   **Note:** These dates are optional when creating units in the **Unit Builder**. You can leave them blank for teachers to set.

10. In **Tools**, click.
Add Teacher Resources to a Unit

1. On the main navigation bar, click **Setup > Unit Builder**.

2. In **Tools**, next to the unit you want to edit, click **Add Teacher Resources**.
   
   **Tip:** Once you add files or links to the **Teacher Resources** folder, changes to **Add Teacher Resources** dialog box to reflect the addition of these files or links.

3. To add files, click **Files**, click **Add Files**, choose a file to upload, and then click **Done**.

   **Note:** Adding a description to the **Description** box is optional when adding files. Assigning a folder is also optional. If you don’t choose a folder, your file will be saved to the **Default Folder**.

4. To add links, select **Links**, click **Add Links**, enter a **Link Name**, a **URL**, and a **Description**, and then click **Save**.

   **Note:** Assigning a folder is optional when adding links. If you don’t choose a folder, your link will be saved to the **Default Folder**.

5. In the **Add Teacher Resources** dialog box, click **Done**.
Copy Content from an Existing Unit

1. On the main navigation bar, click **Setup > Unit Builder**.

2. In **Tools**, next to the unit you want to copy content **into**, click 
   ![open tool](image), and then click ![open tool](image).

3. In the **Copy Content from Existing Unit** dialog box, select the unit you want to copy the content **from**.

   ![Copy Content from Existing Unit dialog box](image)

   Select the unit from which the content should be copied.

4. Click **Copy Selected Unit** to copy the content from the selected unit into the unit you are editing.

   **Note:** This process copies only the content of the selected unit — the Unit Name, Start Date, End Date, and Teacher Resources. It will not automatically assign the unit to any classes.

5. In **Tools**, click ![open tool](image).

**Edit or Delete an Existing Unit**

1. On the main navigation bar, click **Setup > Unit Builder**.

2. In **Tools**, next to the unit you want to edit, do either of the following:

   - To edit, click ![open tool](image), make your changes, and then click ![open tool](image).
   - To delete, click ![open tool](image), and then click **Confirm**.

   **Warning:** This action will delete the unit from the **Unit Builder** and from all classes it is assigned to. In addition, any lesson plans and content that teachers have added to this unit will be deleted.
4.2 Set Unit Permissions

Using Unit Builder permissions settings, you can provide teachers and other administrators with access to Unit Builder features.

When setting unit permissions, you can do the following:

- Grant other administrators access to the Unit Builder.
- Allow teachers to edit the content of units.
- Allow teachers to create units.
- Allow teachers to add files and links to units.

**Grant Administrators Access to the Unit Builder**

To enable admin users to access the Unit Builder, do the following:

1. On the main navigation bar, click Manage Accounts, and then click Admin.
2. Click next to the admin user account.
3. On the Update User page, under Permissions, locate the Setup group box.
4. Select the check box next to Unit Builder, and then click Update User.
Set Unit Permissions for Teachers

When you create a unit in the Unit Builder and assign it to a class, the unit appears in the Lesson Planner for that class. The unit in the administrator’s Unit Builder and the unit in the teacher’s Lesson Planner are the same. Editing the content of a unit (Unit Name, Start Date, End Date, Teacher Resources) from one location immediately updates the other.

To set unit permissions for teachers, do any of the following:

1. On the main navigation bar, click Setup > Unit Builder, and then click Settings.
   The Teacher Permissions check boxes are on the unit builder settings page.

2. Select Allow teachers to edit the content of Units created by administrators.
   Selecting this check box enables teachers to edit the Unit Name.
   
   Note: The Unit Name is the only content affected by this setting. Teachers can always edit the Start Date and End Date of a unit. Also, when a teacher edits a unit with more than one assigned class, the Unit Builder duplicates the unit. An information icon indicates that the new unit was “Edited by [Last Name], [First Name].”

3. Select Allow teachers to create Units.
   Selecting this check box enables teachers to create new units in their Lesson Planner.
   
   Note: When a teacher creates a unit, it appears in the Unit Builder. An information icon indicates that this unit was “Created by [Last Name], [First Name].” This applies to units that teachers created before the Unit Builder was released.

4. Select Allow teachers to add files and links to Teacher Resources.
   Selecting this check box enables teachers to add their own files and links to Teacher Resources.
   
   Note: Teachers cannot edit or delete files that an administrator has added to Teacher Resources.

5. Click Save once you’ve made your selections.
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CHAPTER 5

Groups

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5.1 Create a Group

This topic covers creating a new Group, assigning users to a Group, and assigning Group Heads to view the student and teacher portal pages of those in the Group. Groups can be used by a staff member who needs to access staff and/or student pages. This includes guidance counselors, principals, and athletic coaches who need to view users’ pages. These users can check students’ grades and progress or how teachers are managing their class pages.

To create a Group, do the following:

1. From your PlusPortals admin account, click **Setup** on the navigation bar, and then click **Groups**.

2. Click **New Group**.

3. Name the Group, give it a description, and set the visibility settings.

4. Under the **Group Heads** tab, click **Add +**.

5. In the **Select Group Head** dialog box, select which type of Group Head you want to assign. The available types are **Admin**, **Student**, **Staff**, and **Parent**.

6. Select a Group Head from the table, and click **OK**.

   **Tip:** Click **OK** before switching between types of Group Heads to make sure your selections are saved.

7. Click **Next: Add Group Members**, or navigate to the **Group Members** tab.
8. To add Group Members, do one of the following:

- Select **All Students** to add all students in your school to this group.

- Select **Students matching the below criteria** to add students from a specific grade level, a database search, or a student lookup:
  
  - Select a grade level from the **Grade Level** table to select all of the students in that grade level.

  ![Students from selected grade levels](image)

  - Complete a database search to select students matching the search criteria.

  ![Students matching DB criteria](image)

  - Click **Add +** to select individual students for this group.

  ![Select Group Members](image)

  - Select **All Staff** to add all staff members in your school to this group.
Select **Staff matching the below criteria** to add staff from a database search or a staff lookup:

- Complete a database search to select staff matching the search criteria.

![Staff matching DB criteria](image)

- Click **Add** + to select individual staff for this group.

![Individual Staff](image)

9. Click **View Students in Group** or **View Staff in Group** to view the students or staff in your group.

10. Click **Save Group** to save your group and return to the **Create and Manage Groups** page.

Once users can access the Group:

- Teacher users can access Groups by clicking **Groups** above the navigation bar.

- Administrator users can access Groups by clicking **Miscellaneous** > **View Groups**.

Do the following for users who don't have a teacher or admin account and need to access a Group page:

- For staff: Assign them a staff account in the TeacherPlus Gradebook Sync Manager in AdminPlus, and they can log in to the portal and have access to the group without having any classes.

- For administrators: Assign the users an admin account, and they can access it from the admin portal.
5.2 Set Group Permissions

After you create a new Group, you can set permissions for the Group Heads. By setting permissions, you give the Group Heads easy access to any information that you select on the Permissions page as well as limit access to any information you want to keep unavailable. Permissions options include student pages, such as Demographics, Schedule, and Attendance, and teacher pages, such as Resources, Lesson Planner, and Students.

1. From your PlusPortals admin account, click Setup on the navigation bar, and then click Groups.

2. Click next to the group you want to edit.

3. Click the Permissions tab.
4. Select any permissions specifications you want to apply to this group.

Group Permissions Overview

A  Choose whether to provide the group head with access to E-Portfolios and student contacts.

B  Set e-mail permissions for group members.

C  Select which student and teacher pages the group head can access.

D  Select which demographic fields are visible for this group.

5. Click **Save Group** to save the group and return to the **Create and Manage Groups** page.
CHAPTER 6

Course Requests

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6.1 Course Request Settings

Before creating, managing, or approving course requests, you should make sure that the year selected in the course request settings is the year you want to work in. All course request tasks you perform affect the selected year. Checking this setting is an important step in the course request process, as it prevents you from performing course request tasks for the wrong year.

To set the course request year, do the following:

1. On the main navigation bar, click Setup > Course Requests, and then click Settings.

2. Next to Use Course Requests in Which Year?, do either of the following:
   - Select Active Year to perform course request tasks in the current school year.
   - Select Scheduling Year to perform course request tasks in a school year that is still being scheduled.

3. Click Save.
6.2 Create a Course Catalog Description

Using the Course Catalog, you can create a course description and add any information you want students to see when they’re requesting the course. You can also change the appearance of the description using the text editor for that perfect personal touch. The course description is available for students if they choose to display more information about the course while completing a Course Request form.

Create a New Course Description

1. On the main navigation bar, click **Setup > Course Requests**, and then click **Course Catalog**.

2. Select the course you want to edit from the table. The text editor appears to the right of the course.

3. Enter or edit the course description in the text editor.

   You can use the text editor to:
   - Format headings and paragraphs.
   - Make text bold, italicized, or underlined.
   - Align text left, center, or right.
   - Create bullet point and numbered lists.
   - Add hyperlinks, tables, and images from the web or from your computer.

4. Click **Save** to complete the process.
Copy Course Descriptions

If you have already created a course catalog and want to keep those descriptions, you can add them from the library. By adding course catalog descriptions from the library, you can copy all descriptions at once. You can then make changes to any courses that evolve from year to year. This process can save you time when preparing for a new school year.

1. Select the year you would like to copy into on the Setup > Course Request > Settings page.

   **Warning:**
   Copying the course catalog overwrites the description data in the year you're copying into.
   - If Setup > Course Request > Settings is set to Active Year, the descriptions will be copied from the previous year, overwriting the active year.
   - If set to Scheduling Year, the descriptions will be copied from the active year, overwriting the scheduling year.

   Check this setting before copying course descriptions.

2. On the main navigation bar, click Setup > Course Requests, and then click Course Catalog.
3. Under the course catalog, click Add from Library, and then click Yes.
4. Individually select any courses you want to update for the current year, use the text editor to make changes to the description, and then click Save.
6.3 Create a Course Request Form

The Course Request process is performed in the following order: You create a course request form and publish it for the student to complete. Once a student has completed the course request form, parents can approve and comment on their child's course selection. Then you can review, approve, and send the course request form to AdminPlus, where the office receives it for processing.

To create a course request form, do the following:

1. On the main navigation bar, click **Setup > Course Requests**, and then click **Course Request Forms**.
2. Click **New Form**.
3. Enter the name of your form in the **Form Name** text box.
4. Enter a description in the **Description** text box.
5. Click **Next: Add Section**.
6. Add a name for this section in the **Section Name** text box.

![Image of the Section Name text box]

7. Do one of the following:
   - Select a Course Group from the drop-down list.
   - Click **Add/Edit Course Group**, and do the following:
     1. In the **Groups** dialog box, select a Course Group from the list, and click **Add Course**.
     2. In the **PlusPortals: Select Courses** dialog box, select a course, and click **Add**.
     3. In the **Groups** dialog box, click **Save**.

**Tip:** You can also remove a course from a Course Group. Having selected a Course Group from the list, select a course, click **Remove Course**, and then click **Save**.
8. Do one of the following:
   - Select **Yes** to allow multiple selections on this part of your form.
     
     **Note:** If you select **Yes**, you can assign the minimum and maximum number of selections.

   - Select **No** to only allow one selection on this part of your form.

9. Click **Save**.

10. To add a new section, click **New Section** and follow steps 6–9.

11. Click **Back to Course Form** when you've completed your form.
6.4 Publish a Course Request Form

A vital part of the course request process is publishing the form to the student portal. Publishing the course requests forms through the student portal keeps the course request process organized and simple for students and administrators. Once the form is published, a student completes the form, and the responses are sent to the admin portal, where you can review and approve them.

To publish a course request form, do the following:

1. On the main navigation bar, click Setup > Course Requests, and then click Publish Forms.

2. Select a form from the Select Course Request Form drop-down list.

3. Click Add Students to give selected students access to this form through the student portal.

4. Select the grade that the students are enrolled in, and then select which students you want to give access to.

5. Click Next to publish the form.
6.5 Recommend Courses for a Student

During the course request process, you can recommend courses students should take. The students then see your recommendations when they complete their course request form. Keep in mind that course recommendations are simply suggestions and aren't permanently assigned to the students.

Recommend Courses for an Individual Student

1. On the main navigation bar, click Setup > Course Requests, and click Course Recommendations.
2. Select a student from the Student Name column.
3. Click Add Course Requests at the bottom of the page.
4. Select a course from the dialog box to request for the student, and click Next.
5. To remove a course recommendation, select the course you added from the Courses tables, and then click Remove Selected Course Requests at the bottom of the page.

Tip: You can add a comment to a course recommendation, which students can see on their course request form. Select a course you've recommended from the Courses table, click Edit above the Recommendations text box, enter the comment, and click Save.
The following diagram summarizes how to manage course recommendations:

**Course Recommendations Screen Overview**

A. Select a student before recommending a course.

B. Any courses you recommend appear in the course list.

C. Enter comments for the selected recommended course. Students will see the comments when the recommended course appears on the course request form.

**Batch Recommend Courses for Several Students**

1. On the main navigation bar, click **Setup > Course Request**, and click **Course Recommendations**.

2. Click **Batch Add Course Requests**.

3. In the **Students from which grades** area, select the grade the students are currently in.
4. In the **Which Students** area, select the students you’re recommending the courses for.

5. In the **Displaying Courses from Scheduling Year** area, select the courses you’re recommending for the students.

6. Click **Next** at the bottom to complete the process.

**Tip:** You can also batch remove course requests from the **Recommendations** screen. Click **Batch Remove Course Requests**, select the current grade and students on the right, select the course(s) to remove on the left, and then click **Next**.

The following diagram illustrates the workflow for batch adding or removing students:

---

**Batch Course Recommendation Overview**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Select a grade from this table to view the students enrolled.</td>
</tr>
<tr>
<td>B</td>
<td>Select the students from this table to add a course request or remove a course request.</td>
</tr>
<tr>
<td>C</td>
<td>Select a course from this table to add a course request or remove a course request.</td>
</tr>
</tbody>
</table>
6.6 Review and Approve Course Requests

After a student has completed a course request form, the responses are sent to your admin portal, where you can review and approve the course requests. After you have reviewed the form, you send the course requests to AdminPlus for the office to process.

Review and Approve Course Requests for an Individual Student

1. On the main navigation bar, click Setup > Course Requests, and then click Review Requests.

2. Select the form you want to review from the drop-down list.

3. Click next to the student’s information to review the course request form.

   **Note:** When a student has requested a course, the check box next to the course title is selected.

4. Click the arrow next to the course title to expand the course and reveal parent and student comments.

   **Note:** Review your school’s policy for approving course requests. Some schools will only approve the student’s course request if a parent has also approved the selection.

5. Select the check box Approved by Reviewer, and add any comments.

   **Note:** The reviewer’s remarks are visible to both parents and students.

6. To approve all of the courses the student has selected, click Approve All Selected Course Requests at the bottom of the course request form.
7. If you're not sure about a course on the student’s course request form, click **Save & Revisit Later**.

**Warning:** Only click **Submit** when you're sure that you want the course request form to be sent to the office. Once you click **Submit**, you can't go back and edit the course request form.

**Review and Approve Course Requests for Several Students at Once**

1. On the main navigation bar, click **Setup > Course Requests**, and then click **Review Requests**.
2. Select the form you want to review from the drop-down list.
3. Select the check box next to the names of the students whose courses you want to approve.
4. Click **Approve All Selected Course Requests** to complete the process and send the course requests to the office.

The following diagram explains the main features of the **Review Requests** screen:

![Review Requests Diagram](image)

**Overview of Review Requests Features**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>This check box only appears if a student has submitted a course request form. After you review the course request form, the check box disappears.</td>
</tr>
<tr>
<td>B</td>
<td>This is the date that the students were given access to this form.</td>
</tr>
<tr>
<td>C</td>
<td>This is the date that the student submitted the course request form.</td>
</tr>
<tr>
<td>D</td>
<td>This is the date that you reviewed and approved the course request form.</td>
</tr>
<tr>
<td>E</td>
<td>This is the date that the office received the course request form.</td>
</tr>
</tbody>
</table>
6.7 Export Course Requests

Using Course Request Exports, you can generate reports on course recommendations, course requests, and course request status. Export these reports as individual Excel files or all at once in a combined report. You can also export the course catalog as an HTML document.

Export Course Catalog

To export the course catalog as an HTML document, do the following:

1. On the main navigation bar, click **Setup > Course Requests**, and then click **Course Request Exports**.
2. Click **Course Catalog**.
3. Open the HTML file in your downloads folder. You can view this file in your web browser.

Export Course Requests

1. On the main navigation bar, click **Setup > Course Requests**, and then click **Course Request Exports**.
2. Click **Combined Report** to export all three reports as one file, or click each individual report you would like to export.
3. Open the Excel file(s) in your downloads folder.
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