



# PlusPortals Manager User Guide

Get Started Managing Your School's Portals

LEARN OUR SOFTWARE STEP BY STEP

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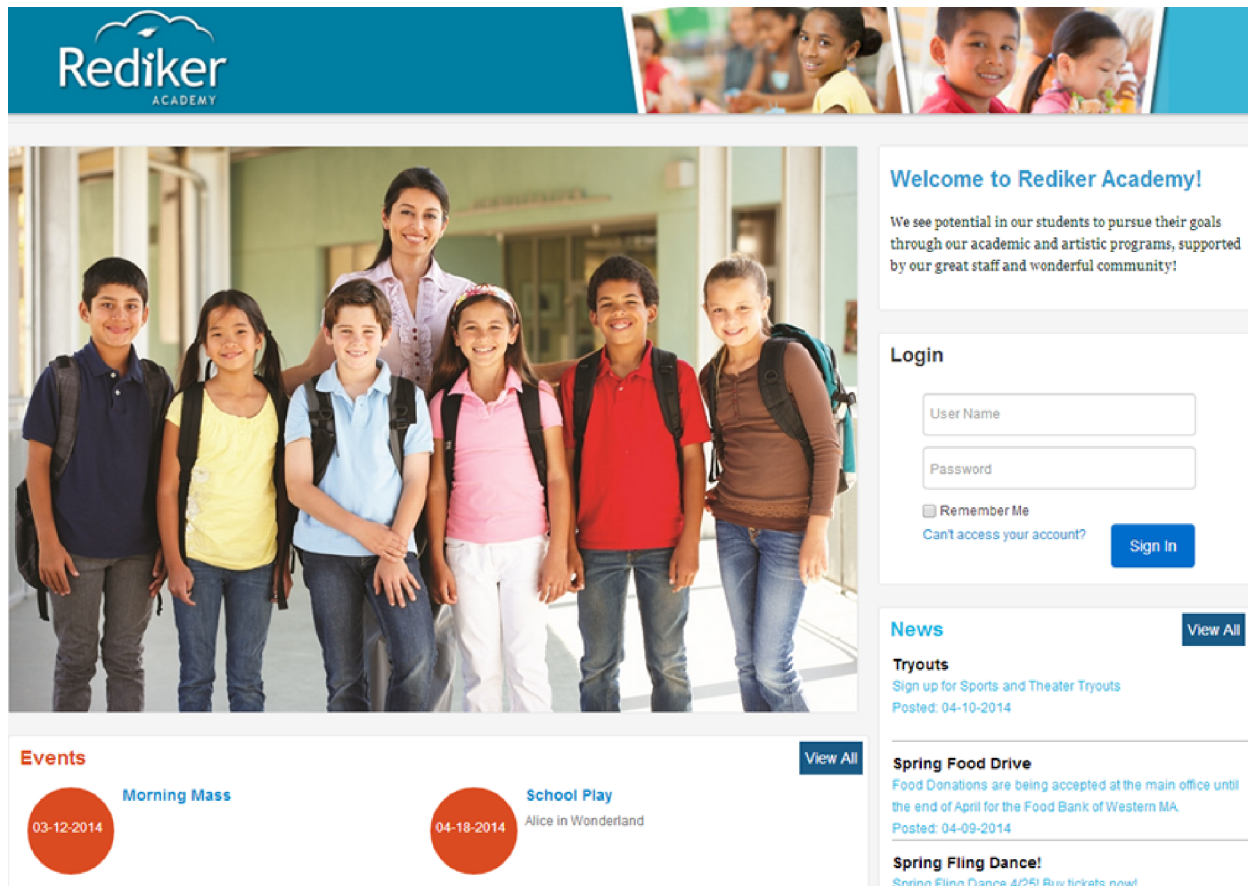
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# CHAPTER 1

## Get Started

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## 1.1 Introduction



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?

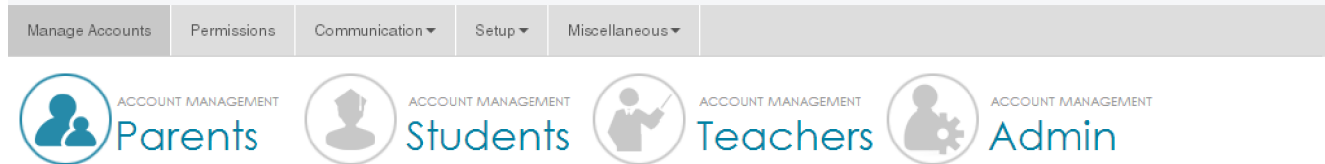
This guide isn't meant for teachers, parents, or students. For more information on using the teacher portal, please refer to the TeacherPlus Portal User Guide. Parents and students who are looking to learn how to use the portals should check out our [fun interactive guides on using the parent and student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

### PlusPortals



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?

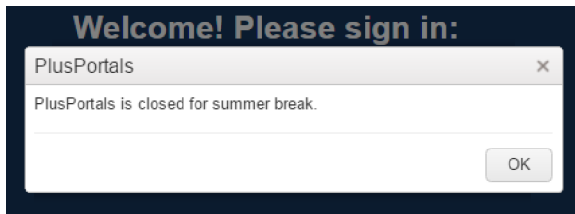
Accounts that share the same login e-mail are automatically linked. The user can choose which role to log in as after entering his or her e-mail and password. As a result, a user with different roles (for example, teacher and parent) doesn't need two separate logins. Linking applies to any account role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

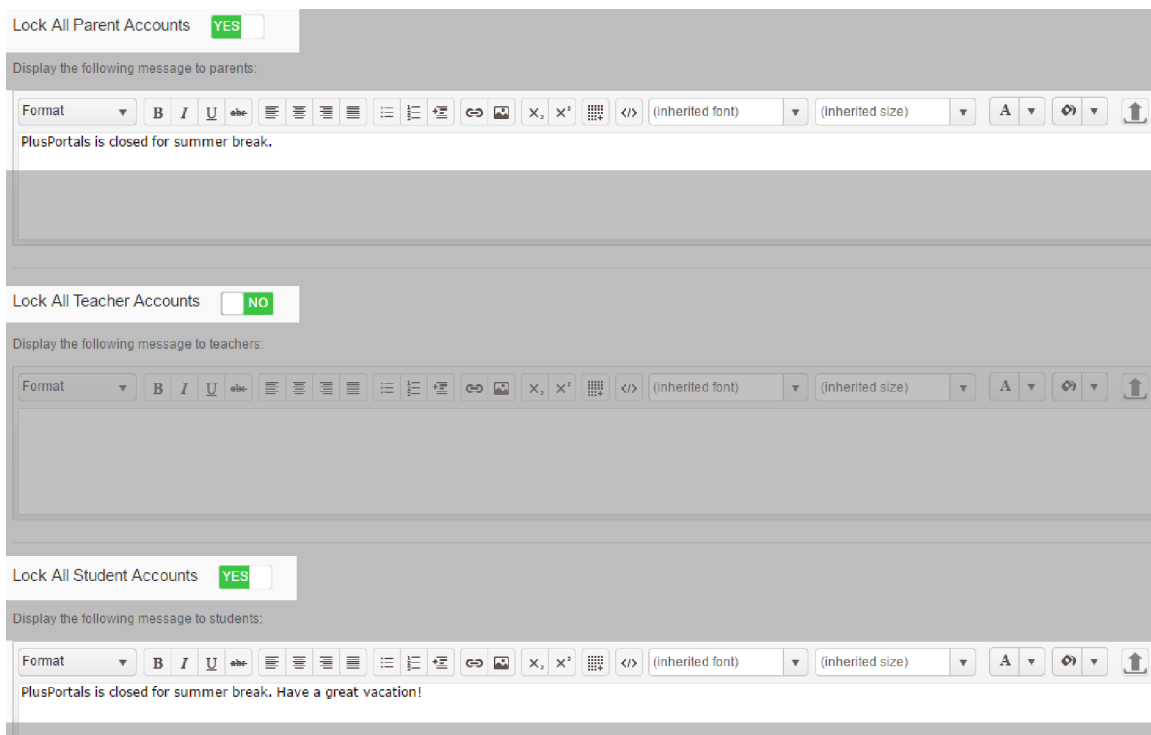
## Lock Accounts by User Group

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**.



Lock All Parent Accounts ☒ YES

Display the following message to parents:

Format **B** **I** **U** **abc** [List Bulleted] [List Numbered] [Link] [Image] [Table] [Code] (inherited font) (inherited size) A [Color] [Background Color] [Undo] [Redo]

PlusPortals is closed for summer break.

Lock All Teacher Accounts ☐ NO

Display the following message to teachers:

Format **B** **I** **U** **abc** [List Bulleted] [List Numbered] [Link] [Image] [Table] [Code] (inherited font) (inherited size) A [Color] [Background Color] [Undo] [Redo]

Lock All Student Accounts ☒ YES

Display the following message to students:

Format **B** **I** **U** **abc** [List Bulleted] [List Numbered] [Link] [Image] [Table] [Code] (inherited font) (inherited size) A [Color] [Background Color] [Undo] [Redo]

PlusPortals is closed for summer break. Have a great vacation!

**Note:** To leave a user group unlocked, set the toggle to **No**.

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



## 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**.

4 of 9 users selected.

Search Parent Accounts by Student Name:

<input type="checkbox"/>	User Name	Login ID	Password	Sta...	Activated Date	Last Logon Date	Students	
<input checked="" type="checkbox"/>	Abuel, Jamie	aanderlonis@rediker.com	p24GezX	ACTIVE	08-27-2013 10:59:52			<input type="button" value="Reset Password"/>
<input checked="" type="checkbox"/>	Abuel, Justin	jabuel@rediker.com	*****	ACTIVE	08-08-2013 15:03:58			<input type="button" value="Reset Password"/>
<input checked="" type="checkbox"/>	Adams, Adam	aanderlonis@gmail.com	*****	ACTIVE	08-11-2013 21:45:24	08-11-2014 10:47:39		<input type="button" value="Reset Password"/>
<input checked="" type="checkbox"/>	Adams, Amy	parentdemo@rediker.com	*****	ACTIVE	12-09-2013 13:28:03	08-10-2014 17:58:19		<input type="button" value="Reset Password"/>
<input type="checkbox"/>	Addvinsky, Raj	rajavandhanl@nouisinfo.com	p24GezX	ACTIVE	04-07-2014 14:58:26			<input type="button" value="Reset Password"/>
<input type="checkbox"/>	Anderlonis Sr., Andrew	andrew@rediker.com	*****	ACTIVE	08-27-2013 10:59:52	08-09-2014 23:00:03		<input type="button" value="Reset Password"/>
<input type="checkbox"/>	Anderlonis, Amy	amy@rediker.com	*****	ACTIVE	08-08-2013 15:03:53			<input type="button" value="Reset Password"/>
<input type="checkbox"/>	Anderlonis, Bob	bob@rediker.com	vhndGnM	ACTIVE	08-26-2013 00:01:57			<input type="button" value="Reset Password"/>
<input type="checkbox"/>	Smith-Anderlonis, Jan	jansmith@rediker.com	p24GezX	ACTIVE	08-26-2013 00:01:57			<input type="button" value="Reset Password"/>

## 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 Finals site and FACTS Management. You can use the Setup menu to activate Single Sign-On. The Single Sign-On interface connects PlusPortals with Finals site or FACTS so that you only need to log in to one to access both. The interface with Finals site provides a link from Finals site to PlusPortals. The interface with FACTS provides a link from PlusPortals to FACTS.

### Finals site Single Sign-On

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

1. Click **Setup** on the navigation bar, and then click **Single Sign-On**.
2. In the **Single Sign-On from Finals site** box, select the **Enable Single Sign-On from Finals site** 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 Finals site and PlusPortals.

Single Sign-On from Finals site

☐ Enable Single Sign-On from Finals site

Shared Key  
(As entered in Finals site website.)

Save

## 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.

The screenshot shows a form titled "Single Sign-On to FACTS". At the top, there is a checkbox labeled "Enable Single Sign-On to FACTS". Below this, there are three text input fields labeled "Institution Key", "Hash Algorithm", and "API Key". A blue "Save" button is located in the bottom right corner of the form.

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**.

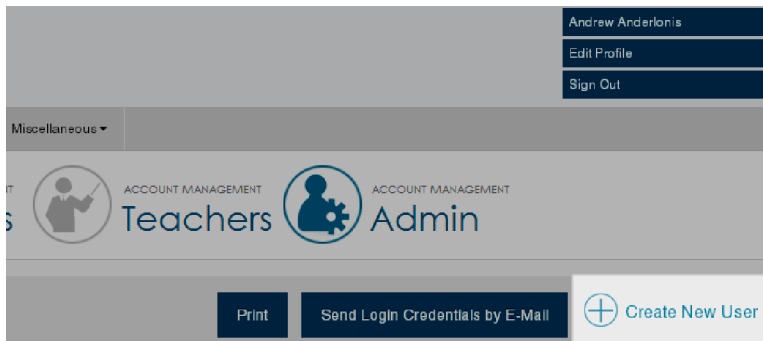
The screenshot shows a form titled "Master Menu Customization". On the left, there is a text box that says "Select the Master Menu options which will be displayed in Parents Portal:". On the right, there are several checkboxes for different menu items: "Calendar", "Forms", "E-Mail & Messages", "E-Locker", "School Announcements", "Course Requests", "Homework Hand-in", "Directory", "FACTS SSO", "Messages", and "E-Portfolio". The "FACTS SSO" checkbox is checked.

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.)

First Name:

Middle Name:

Last Name:

User Name:

Password:  [Password Requirements](#)

<input checked="" type="checkbox"/> Manage Accounts	<input checked="" type="checkbox"/> Permissions	<input checked="" type="checkbox"/> E-Mails and Messages
<input checked="" type="checkbox"/> School Announcements	<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> School Resources
<input checked="" type="checkbox"/> E-Mail Setup	<input checked="" type="checkbox"/> Groups	<input checked="" type="checkbox"/> Appearance
<input checked="" type="checkbox"/> Reports/Statistics	<input checked="" type="checkbox"/> View Groups	<input checked="" type="checkbox"/> Single Sign-On
<input checked="" type="checkbox"/> Portfolio Categories	<input checked="" type="checkbox"/> Automated Notifications	<input checked="" type="checkbox"/> Course Requests

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

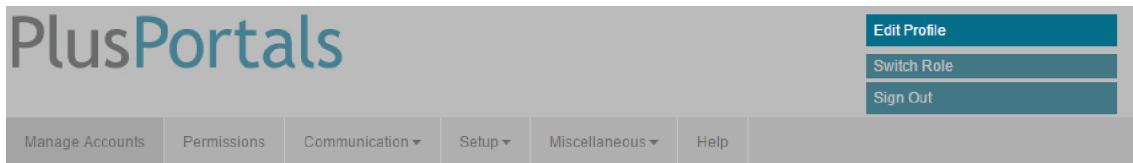
## 1.6 Edit Profile

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:

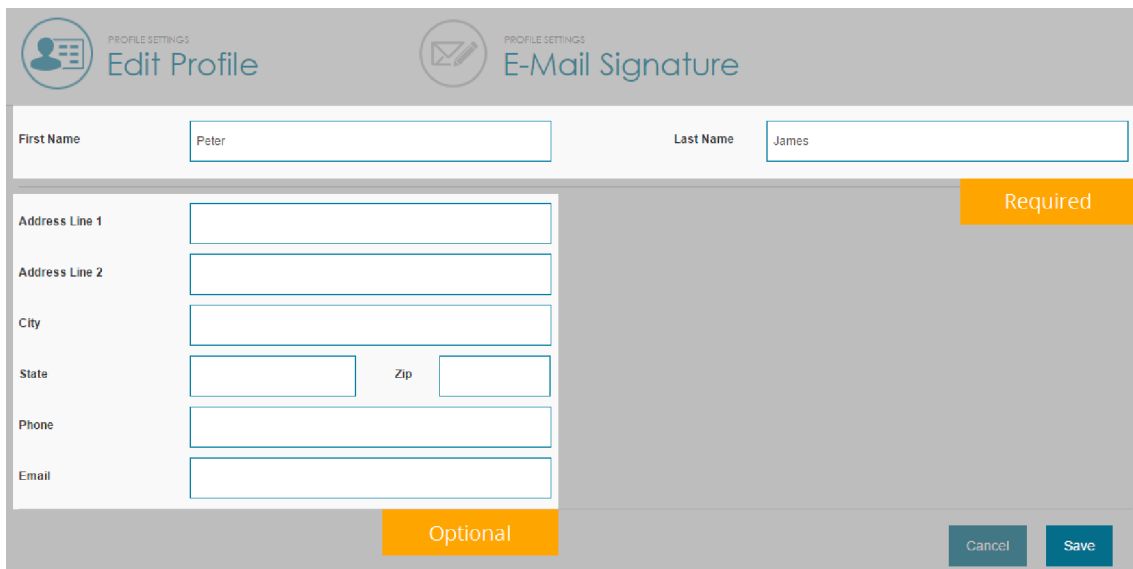
1. Click **Edit Profile** on the page header.



The image shows the top header of the PlusPortals interface. On the left is the 'PlusPortals' logo. To its right is a navigation menu with links: 'Manage Accounts', 'Permissions', 'Communication' (with a dropdown arrow), 'Setup' (with a dropdown arrow), 'Miscellaneous' (with a dropdown arrow), and 'Help'. On the far right, there is a vertical stack of three buttons: 'Edit Profile' (highlighted in blue), 'Switch Role', and 'Sign Out'.

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.

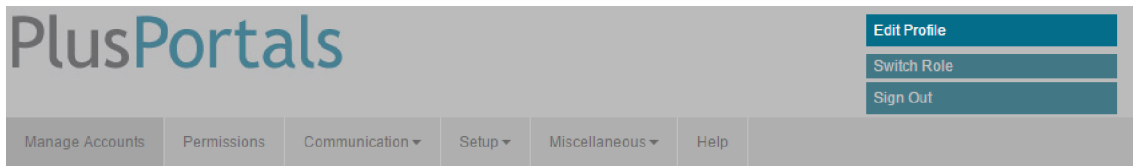


The image displays two side-by-side forms under the 'PROFILE SETTINGS' header. The left form is titled 'Edit Profile' and contains input fields for 'First Name' (with the value 'Peter'), 'Last Name' (with the value 'James'), 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip', 'Phone', and 'Email'. A large orange box on the right side of this form is labeled 'Required'. Below the form is an orange button labeled 'Optional'. The right form is titled 'E-Mail Signature' and contains a text area for the signature. At the bottom right of the entire section are two buttons: 'Cancel' and 'Save'.

## Edit Administrator E-Mail Signature

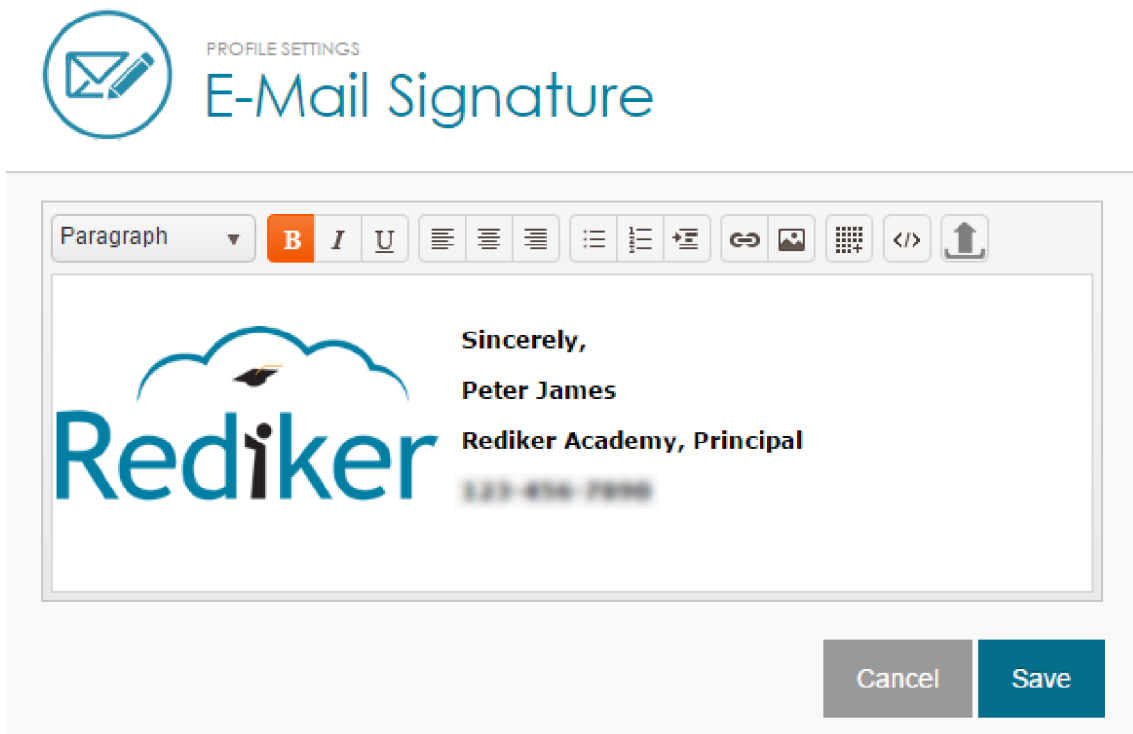
To edit your e-mail signature, do the following:

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

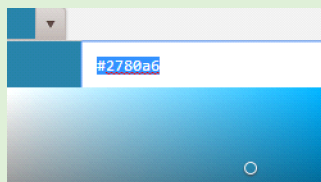
To customize the Login page:

- Click **Miscellaneous > Appearance > Login Page**.

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

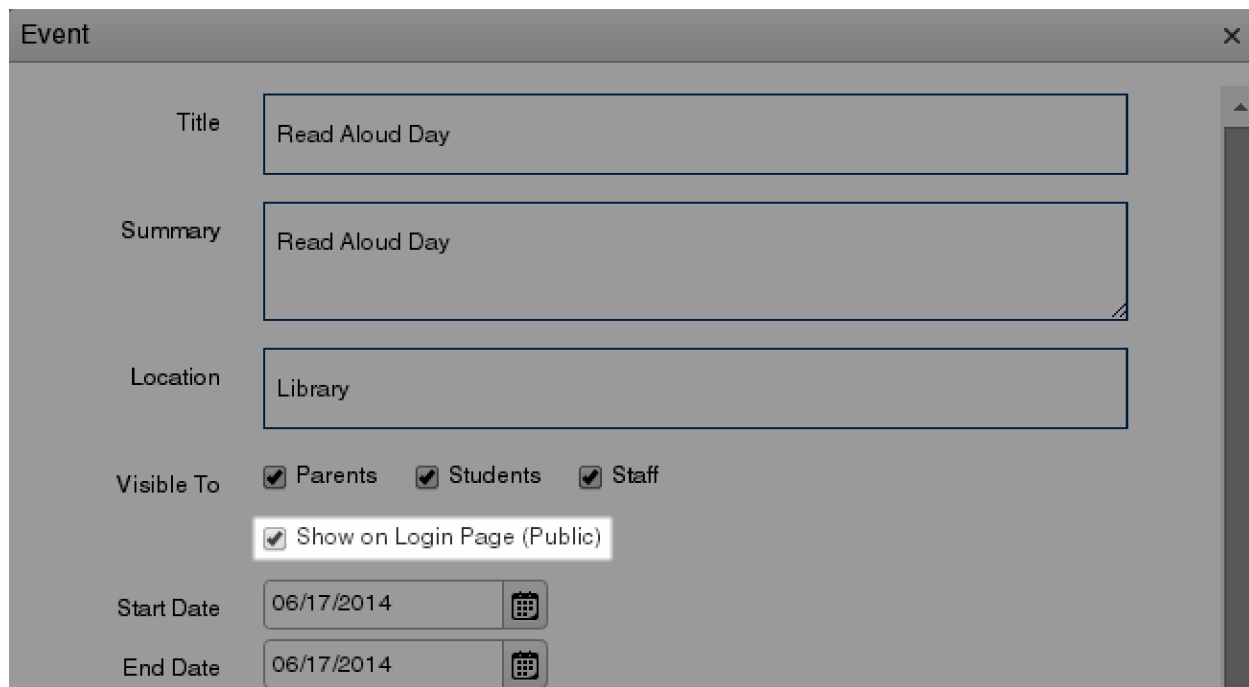
#### Tip:

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)**.



**Event**

Title: Read Aloud Day

Summary: Read Aloud Day

Location: Library

Visible To: ☒ Parents ☒ Students ☒ Staff

☒ Show on Login Page (Public)

Start Date: 06/17/2014

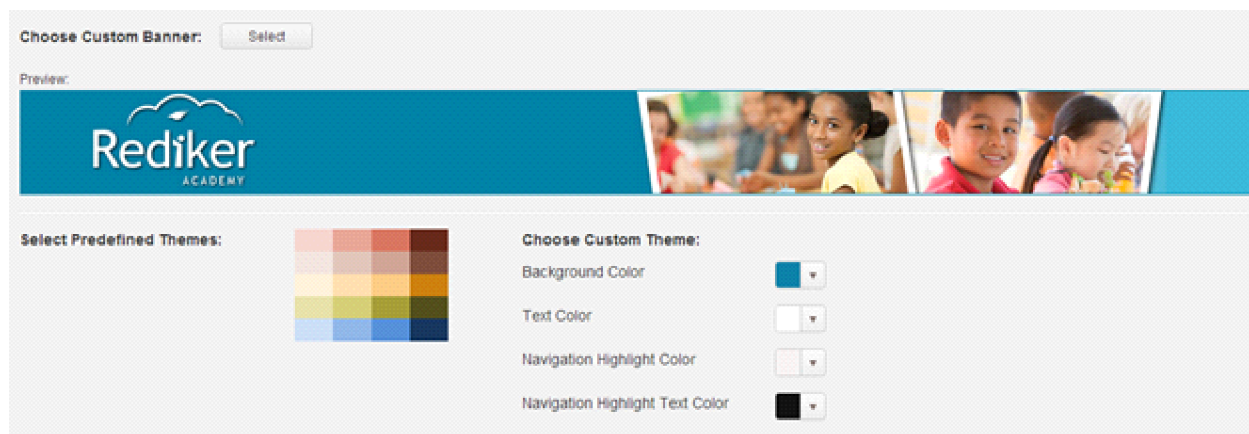
End Date: 06/17/2014

## 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.



Choose Custom Banner:

Preview:

Rediker ACADEMY

Select Predefined Themes:

Choose Custom Theme:

Background Color:

Text Color:

Navigation Highlight Color:

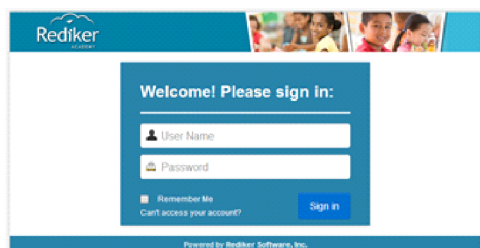
Navigation Highlight Text Color:



## Home Page Appearance

Want to make your login page even better?

Transform your current PlusPortals login box from this...



The current PlusPortals login box is a simple, functional form. It features a blue header with the Rediker logo and a small photo of children. The main content area is white with a blue border. It contains a 'Welcome! Please sign in:' message, a 'User Name' field, a 'Password' field, a 'Remember Me' checkbox, and a 'Sign in' button. A footer note reads 'Powered by Rediker Software, Inc.'

to this!



The Rediker Academy home page is a modern, visually appealing design. It features a large blue header with the Rediker Academy logo and a photo of children. Below the header is a large photo of a teacher and six students. The page is divided into several sections: a 'Welcome to Rediker Academy!' message, a 'Login' section with fields for 'User Name' and 'Password', a 'News' section with a 'View All' button, and an 'Events' section with two event cards: 'Morning Mass' (03-12-2014) and 'School Play' (04-18-2014). The 'School Play' card also mentions 'Alice in Wonderland'. The 'News' section includes 'Tryouts' (Sign up for Sports and Theater Tryouts, Posted: 04-10-2014), 'Spring Food Drive' (Food Donations are being accepted at the main office until the end of April for the Food Bank of Western MA, Posted: 04-09-2014), and 'Spring Fling Dance!' (Spring Fling Dance 4/25! Buy tickets now!).

## 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**.

**PLUSPORTALS HOME PAGE CUSTOMIZATION**  
**PlusPortals Home**

Remember to apply any changes you make to the PlusPortals Home page.

☒ Use PlusPortals Home Page instead of Login Page. Select this check box to use the Home page feature instead of the login box.

**Apply Changes**

**Choose Custom Banner:**  Select a custom banner.  
The recommended banner size is 1200x100 pixels.

Preview:

Select the content boxes which you want to show in your Home Screen  
☒ Image ☒ Message ☒ News ☒ Events ☒ School Resources

Organize your Home Screen how you want, just drag and drop the content boxes.

Select Background Color:  Select a background color.

**Manage Image**  
Select an image.

**Create a message.**

**Login**  
User Name  
Password  
☐ Remember Me  
Can't access  
  
**Edit Message**  
Welcome to Rediker Academy!  
We see potential in our students to pursue their goals through our academic and artistic programs, supported by our great staff and wonderful community!  
[Click Here to Report Tardy!](#)

Just drag and drop content boxes to rearrange the PlusPortals Home page.

**Events** [Customize](#)  
12/12/2014 "Pattern in a Lonely Crowd " | Gallery Exhibition  
Paul Mellon Arts Center Gallery  
12/12/2014 Artist's Reception for "Patterns in a Lonely Crowd "  
Paul Mellon Arts Center Gallery

**School Resources** [Customize](#)  
Make Your Year-End Tax Deductible Donation Before Dec 31.  
[Download File](#)  
Author Junot Diaz Visits Campus.  
[Link](#)  
Customize content box color scheme.

**News** [Customize](#)  
Make Your Year-End Tax Deductible Donation Before Dec 31.  
Make Your Year-End Tax Deductible Donation Before Dec 31.  
[Download File](#)  
[Link](#)  
Posted: December 19.  
Author Junot Diaz Visits Campus.  
[Download File](#)  
[Link](#)  
Posted: December 19.

## 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**.

Logout Page Settings

Enter a custom URL to which all users will be redirected upon logout.  
(Leave this blank if you want to redirect the users to PlusPortals home page)

URL:

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.

The screenshot shows the 'User List Specifications' form. On the left, a sidebar contains 'User List' (highlighted in orange) and 'Student List with Contacts'. The main form area has the following fields:

- Users:** Two radio buttons, 'Logged In' (selected) and 'Not Logged In'.
- Last Logon Date:** A 'From' date field set to '7/5/2015' and a 'To' date field set to '8/11/2015', both with calendar icons.
- User Type:** Four radio buttons: 'Parents' (selected), 'Students', 'Teachers', and 'Admin'.

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

This screenshot shows the 'User List Specifications' form with the 'Not Logged In' radio button selected. The 'From' and 'To' date fields are empty. The 'User Type' section remains the same with 'Parents' selected.

- Users:** Two radio buttons, 'Logged In' and 'Not Logged In' (selected).
- Last Logon Date:** Empty 'From' and 'To' date fields with calendar icons.
- User Type:** Four radio buttons: 'Parents' (selected), 'Students', 'Teachers', and 'Admin'.

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.

The screenshot shows a software interface with two panes. The left pane has a header 'User List' and a sub-header 'Student List with Contacts' which is highlighted in orange. The right pane is titled 'Student List with Contacts Specifications'. It contains a section 'Students:' with two radio buttons: 'All' and 'Grade Level'. The 'Grade Level' radio button is selected. Below this is a list box containing the following items: 'Grade Level', 'GRADE K', 'GRADE 1', 'GRADE 2', 'GRADE 3', 'GRADE 4', and 'GRADE 5'. Each item has a checkbox to its left. The checkbox for 'GRADE 2' is checked. The list box has a scrollbar on the right side.

4. Click **Generate Report**.

*Page left blank intentionally.*

# 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.

<input type="checkbox"/>	Category Name	Portal Display Name (click name to edit)
<input checked="" type="checkbox"/>	Default Data Base Report	Database Reports
<input type="checkbox"/>	Default Attendance Report	Attendance Reports
<input checked="" type="checkbox"/>	Default Report Cards Report	Report Cards
<input checked="" type="checkbox"/>	Default Scheduling Report	Scheduling Reports
<input checked="" type="checkbox"/>	Default Discipline Report	Discipline Reports
<input type="checkbox"/>	Default Billing Report	Billing Reports
<input checked="" type="checkbox"/>	Manually Added Report	Manually Added Reports
<input checked="" type="checkbox"/>	Teacher Added Report	Teacher Added Reports
<input checked="" type="checkbox"/>	IEP	IEP

☒ Show portfolio documents not belonging to any of the above categories

Save

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

Select the options which will be displayed on the Home Page of Parents and Students Portal:

☒ Notifications And Alerts

☒ Calendar

☒ School Announcements

☒ School Links And Files

Select the options which will be displayed on the Home Page of Teacher Portal:

☒ Notifications And Alerts

☒ Calendar

☒ School Announcements

☒ School Links And Files

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.

Notifications & Alerts			
Title	Description	View	
Be cautious on snow days of ice!	Snowy Days		

Calendar			
Events	Date	View	
Quiz Study Guide	02-28-2014		

School Announcements			
Title	Description	View	
Winter Food Drive	Food Donations are being accepted at...		

School Links And Files			
Description	Links And Files	View	
Great Learning Resource	<a href="#">Khan Academy</a>		
December Lunch Menu	TeacherPlus Portal Overview.pdf		
School Handbook	ParentPlus-StudentPlus Portal Overvie...		

## 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.

### Password Management

- ☐ Students cannot change password
- ☐ Teachers cannot change password
- ☐ Parents cannot change password

## 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.

### Directory

Default Directory Opt-In/Opt-out Setting for Parents and Students:

- ☐ Opt-in (Parents and Students are SHOWN in the directory by default and will need to elect to Opt-Out)
- ☒ Opt-out (Parents and Students are NOT SHOWN in the directory by default and will need to elect to Opt-In)

Display non-teaching staff member (ST301 - ST600) information?


- ☐ Yes
- ☒ No


## 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.

### Quarter Ending Dates

Student's courses will be shown based on the quarter ending dates set here in Parents portal and Students portal

First Quarter Ending Date :  

Second Quarter Ending Date :  

Third Quarter Ending Date :  

Show Which Courses? ☐ From Current Quarter ☒ From Current and Previous Quarters

Include Period Attendance from which quarters? ☒ QTR1 ☒ QTR2 ☒ QTR3 ☒ QTR4



## 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.

### Report Card Settings for Parents and Students

**Show Grades for which Report Card Columns?**

1st:	FIRST MARKING PERIOD	<input checked="" type="checkbox"/>
2nd:	SECOND MARKING PERIOD	<input checked="" type="checkbox"/>
S1X:	SEM 1 EXAM	<input checked="" type="checkbox"/>
S1 :	SEM 1 GRADE	<input checked="" type="checkbox"/>
ENG:	ENGAGEMENT	<input checked="" type="checkbox"/>
3rd:	THIRD MARKING PERIOD	<input checked="" type="checkbox"/>
4th:	FOURTH MARKING PERIOD	<input checked="" type="checkbox"/>
S2X:	SEM 2 EXAM	<input checked="" type="checkbox"/>
S2 :	SEM 2 GRADE	<input checked="" type="checkbox"/>
FIN:	FINAL GRADE	<input checked="" type="checkbox"/>
ABS:	Absences	<input checked="" type="checkbox"/>
C 1:	COMMENT ONE	<input checked="" type="checkbox"/>
C 2:	COMMENT TWO	<input checked="" type="checkbox"/>

**Show Grades for which Students?**

☐ Use Number Grade Print Table from AdminPlus [?](#)

Grade Level	Visible
GRADE K	<input checked="" type="checkbox"/>
GRADE 1	<input checked="" type="checkbox"/>
GRADE 2	<input checked="" type="checkbox"/>
GRADE 3	<input checked="" type="checkbox"/>
GRADE 4	<input checked="" type="checkbox"/>
GRADE 5	<input checked="" type="checkbox"/>
GRADE 6	<input checked="" type="checkbox"/>
GRADE 7	<input checked="" type="checkbox"/>
GRADE 8	<input checked="" type="checkbox"/>
GRADE 9	<input checked="" type="checkbox"/>
GRADE 10	<input checked="" type="checkbox"/>
GRADE 11	<input checked="" type="checkbox"/>

**Skill and Narrative Columns Settings:**

<input checked="" type="checkbox"/>	Show Skills Column in Report Card
<input checked="" type="checkbox"/>	Show Narratives Column in Report Card

**Honor Roll and Class Rank Settings:**

<input checked="" type="checkbox"/>	Show Honor Roll
<input type="checkbox"/>	Show Class Rank

**Student GPA Settings:**

<input type="checkbox"/>	Show Adjusted Quality Points
<input type="checkbox"/>	Show Simple Quality Points
<input checked="" type="checkbox"/>	Show Adjusted Weight
<input type="checkbox"/>	Show Simple Weight
<input type="checkbox"/>	Show Adjusted GPA
<input type="checkbox"/>	Show Simple GPA
<input checked="" type="checkbox"/>	Show Credits

## 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.

### Progress Box, Scores and Progress Reports settings for Parents and Students

**Show Scores for which Report Card Columns?**

1st:	FIRST MARKING PERIOD	<input checked="" type="checkbox"/>
2nd:	SECOND MARKING PERIOD	<input checked="" type="checkbox"/>
S1X:	SEM 1 EXAM	<input type="checkbox"/>
S1 :	SEM 1 GRADE	<input type="checkbox"/>
ENG:	ENGAGEMENT	<input type="checkbox"/>
3rd:	THIRD MARKING PERIOD	<input checked="" type="checkbox"/>
4th:	FOURTH MARKING PERIOD	<input checked="" type="checkbox"/>
S2X:	SEM 2 EXAM	<input type="checkbox"/>
S2 :	SEM 2 GRADE	<input type="checkbox"/>
FIN:	FINAL GRADE	<input type="checkbox"/>
ABS:	Absences	<input type="checkbox"/>
C 1:	COMMENT ONE	<input checked="" type="checkbox"/>
C 2:	COMMENT TWO	<input checked="" type="checkbox"/>

**Show Scores for which Students?**

Grade Level	Visible
GRADE K	<input checked="" type="checkbox"/>
GRADE 1	<input checked="" type="checkbox"/>
GRADE 2	<input checked="" type="checkbox"/>
GRADE 3	<input checked="" type="checkbox"/>
GRADE 4	<input checked="" type="checkbox"/>
GRADE 5	<input checked="" type="checkbox"/>
GRADE 6	<input checked="" type="checkbox"/>
GRADE 7	<input checked="" type="checkbox"/>
GRADE 8	<input checked="" type="checkbox"/>
GRADE 9	<input checked="" type="checkbox"/>
GRADE 10	<input checked="" type="checkbox"/>
GRADE 11	<input checked="" type="checkbox"/>

**Progress Box Columns Settings:**

Grade Level	Average	Grade
GRADE K	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRADE 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRADE 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRADE 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRADE 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRADE 5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Category Averages Settings:**

<input checked="" type="checkbox"/>	Show Category Averages
-------------------------------------	------------------------

**Progress Reports Settings:**

<input checked="" type="checkbox"/>	Show Progress Reports
-------------------------------------	-----------------------

**Narrative Settings:**

<input checked="" type="checkbox"/>	Show Narratives
-------------------------------------	-----------------

## 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)

☐ Show Summary View

☒ Show Detailed View

Show which columns in Detailed View?

<input type="checkbox"/>	Score
<input type="checkbox"/>	Percentage (%)
<input type="checkbox"/>	Grade
<input type="checkbox"/>	Notes
<input type="checkbox"/>	Possible Points

## 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)

Show which columns in Standards Live Report?

<input checked="" type="checkbox"/>	Assessment
<input checked="" type="checkbox"/>	Description
<input checked="" type="checkbox"/>	Category
<input checked="" type="checkbox"/>	Date

## 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.

### Report Card/Scores Restriction List Settings

Restrict Access to Report Card and Scores tab to specific parents and students

Select Parents

<input type="checkbox"/>	Parent Name	Login Id	Linked Students

Select Students

<input type="checkbox"/>	Student Name	Login Id

Remove Selected from Restriction List

Customize Restriction Message

Save

Format


**B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon] [Upload Icon]

Your account has been restricted. Please contact your school's administration for more information.

## Incidents

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

### Incidents

Show Incidents on or after :  

## Section Meeting Time

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

### Section Meeting Time

☒ Show Section Meeting Time to Teachers

☒ Show Section Meeting Time to Parents

☒ Show Section Meeting Time to Students

## 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.

Homework

How to show homework:

- ☐ Show current month's homework on top
- ☒ Show homework by sorting on due date (descending order)
- ☐ Show homework by sorting on due date descending with current day due at top

## 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.

Section Visibility

Only the selected Courses/Sections will be shown in the Parents and Students Portal and in the Report Card Tab

☐ Show withdrawn courses to parents and students if there are grades or scores

☒ Allow teachers to select parent/student visibility and change display name for their courses

Search by Course Name:

Search by Alphabet: All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Course/Section	Section Name	Teacher Name	Meeting Time	<input type="checkbox"/> Parent/Student Visibility	Display Name for Parent/Student	<input type="checkbox"/> Report Card Visibility
Accting 1	0700/01	Green, Manny	D	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Accting 1	0700/02	Green, Manny	B	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Accting 2	0701/01	Tarr, May	A	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

## 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**.

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

☒ 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

Select the Master Menu options which will be displayed in Parents Portal:	<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> School Announcements	<input checked="" type="checkbox"/> Directory
	<input type="checkbox"/> Forms	<input type="checkbox"/> Course Requests	<input type="checkbox"/> FACTS SSO
	E-Mail & Messages : <input checked="" type="checkbox"/> E-Mail <input checked="" type="checkbox"/> Messages		
	E-Locker : <input checked="" type="checkbox"/> Homework Hand-in <input type="checkbox"/> E-Portfolio <input checked="" type="checkbox"/> Quizzes		
Select the Section Menu options which will be displayed in Parents Portal:	<input type="checkbox"/> Demographics	<input checked="" type="checkbox"/> Attendance	<input checked="" type="checkbox"/> Report Card
	<input checked="" type="checkbox"/> Schedule	<input checked="" type="checkbox"/> Discipline	<input checked="" type="checkbox"/> Classes
	<input checked="" type="checkbox"/> Lesson Plans	<input checked="" type="checkbox"/> Scores	<input type="checkbox"/> Reports
	<input type="checkbox"/> Quizzes		

Figure 1: Master Menu Customization

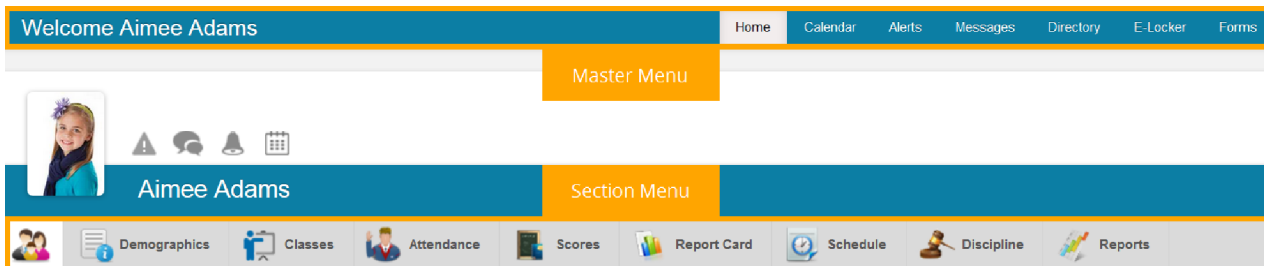


Figure 2: Parent and Student Portal Navigation Menus



## 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).

Select the Directory Visibility for Parent Portal

☒ Show Parent Directory

Heading	Fields	
<input type="text" value="Address"/>	<input type="text" value="Street,City,State,Zip"/>	<input type="button" value="Select"/>
<input type="text" value="Phone"/>	<input type="text" value="Home Phone"/>	<input type="button" value="Select"/>
<input type="text" value="Email"/>	<input type="text" value="Primary E-Mail"/>	<input type="button" value="Select"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>

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

Select the Directory Visibility for Teacher Portal

☒ Show Teacher Directory

Heading	Fields	
<input type="text" value="Position"/>	<input type="text" value="Position"/>	<input type="button" value="Select"/>
<input type="text" value="Phone"/>	<input type="text" value="Phone"/>	<input type="button" value="Select"/>
<input type="text" value="Homeroom"/>	<input type="text" value="Homeroom"/>	<input type="button" value="Select"/>
<input type="text" value="School Email"/>	<input type="text" value="SCHOOL EMAIL"/>	<input type="button" value="Select"/>
<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>

Select the Directory Visibility for Student Portal

☒ Show Student Directory

Heading	Fields	
<input type="text" value="Parent/Guardian"/>	<input type="text" value="Parent/Guardian"/>	<input type="button" value="Select"/>
<input type="text" value="Address"/>	<input type="text" value="Street,City,State,ZIP"/>	<input type="button" value="Select"/>
<input type="text" value="Phone"/>	<input type="text" value="Phone"/>	<input type="button" value="Select"/>
<input type="text" value="Homeroom"/>	<input type="text" value="Homeroom"/>	<input type="button" value="Select"/>

**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.

### Attendance

<input checked="" type="checkbox"/>	Show Period Attendance
<input checked="" type="checkbox"/>	Show Daily Attendance

## 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.

### Demographics

☒ Allow parents to edit demographic fields

Select the fields which can be viewed/edited by parents:

Demographics	<input type="checkbox"/> View	<input type="checkbox"/> Edit
Parent/Guardian	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Street	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ZIP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Homeroom	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Birth Date	<input type="checkbox"/>	<input type="checkbox"/>
Emerg. Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BIRTH PL	<input type="checkbox"/>	<input type="checkbox"/>
FIRST NAME	<input type="checkbox"/>	<input type="checkbox"/>
LOCKER #	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**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.

#### Master Menu Customization

Select the Master Menu options which will be displayed in Teachers Portal for Teaching staff:	<input checked="" type="checkbox"/> Gradebook	<input checked="" type="checkbox"/> Calendar	<input type="checkbox"/> Course Requests
	<input checked="" type="checkbox"/> School Announcements	<input type="checkbox"/> Forms	<input checked="" type="checkbox"/> Directory
	<input type="checkbox"/> Schedule		
E-Mail & Messages :	<input checked="" type="checkbox"/> E-Mail	<input checked="" type="checkbox"/> Messages	
E-Locker :	<input checked="" type="checkbox"/> Homework Hand-in	<input type="checkbox"/> E-Portfolio	
Select the Master Menu options which will be displayed in Teachers Portal for Non-Teaching staff:	<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/> Course Requests	<input checked="" type="checkbox"/> School Announcements
	<input checked="" type="checkbox"/> Resources	<input checked="" type="checkbox"/> Forms	<input checked="" type="checkbox"/> Directory
E-Mail & Messages :	<input checked="" type="checkbox"/> E-Mail	<input checked="" type="checkbox"/> Messages	
E-Locker :	<input checked="" type="checkbox"/> E-Portfolio		
Select the Section Menu options which will be displayed in Teachers Portal for Teaching staff:	<input checked="" type="checkbox"/> Lesson Planner	<input checked="" type="checkbox"/> Progress	<input checked="" type="checkbox"/> Students
	<input checked="" type="checkbox"/> Attendance	<input checked="" type="checkbox"/> Scores	<input checked="" type="checkbox"/> Homework
	<input checked="" type="checkbox"/> Announcements	<input checked="" type="checkbox"/> Resources	
	<input type="checkbox"/> Class Quizzes		
Show the new beta HTML5 Gradebook link?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	
Show the Silverlight Gradebook link?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	

Figure 1: Master Menu Customization

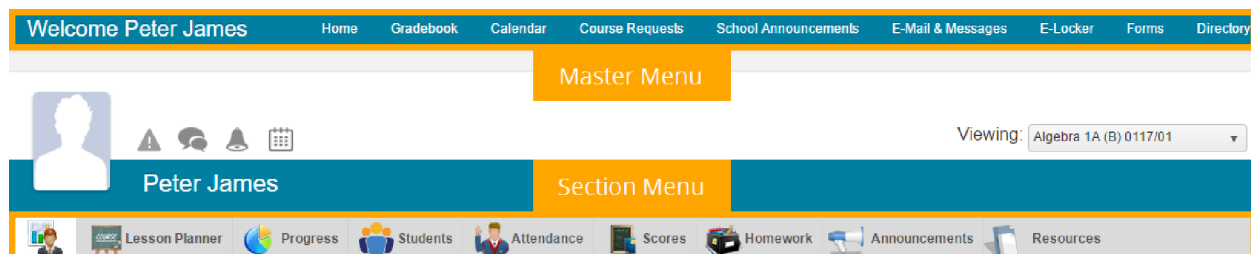


Figure 2: TeacherPlus Portal Navigation Menus

## 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

Select the Student Section Menu options which will be displayed in Teachers Portal:

<input checked="" type="checkbox"/> Progress	<input checked="" type="checkbox"/> Recent Scores	<input checked="" type="checkbox"/> Attendance Totals
<input checked="" type="checkbox"/> Incidents	<input checked="" type="checkbox"/> View Schedule	<input checked="" type="checkbox"/> View Demographics
<input checked="" type="checkbox"/> View Contacts		

## 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

Exams, Semester and Final Averages Settings:

☒ Show Exams, Semester and Final Averages

## 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

Allow Teachers to View Incidents	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Teachers to Add Incidents	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Teachers to Add Incidents to which students?	<input checked="" type="radio"/> Only students of their section <input type="radio"/> All students in school

## Demographics

Select which demographic fields a teacher can view for any given student.

### Demographics

Show Which Fields?

Select All

Demographics	Visible
Parent/Guardian	<input checked="" type="checkbox"/>
Street	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>

## 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.

### Calendar

☒ Allow Teachers to create Event categories

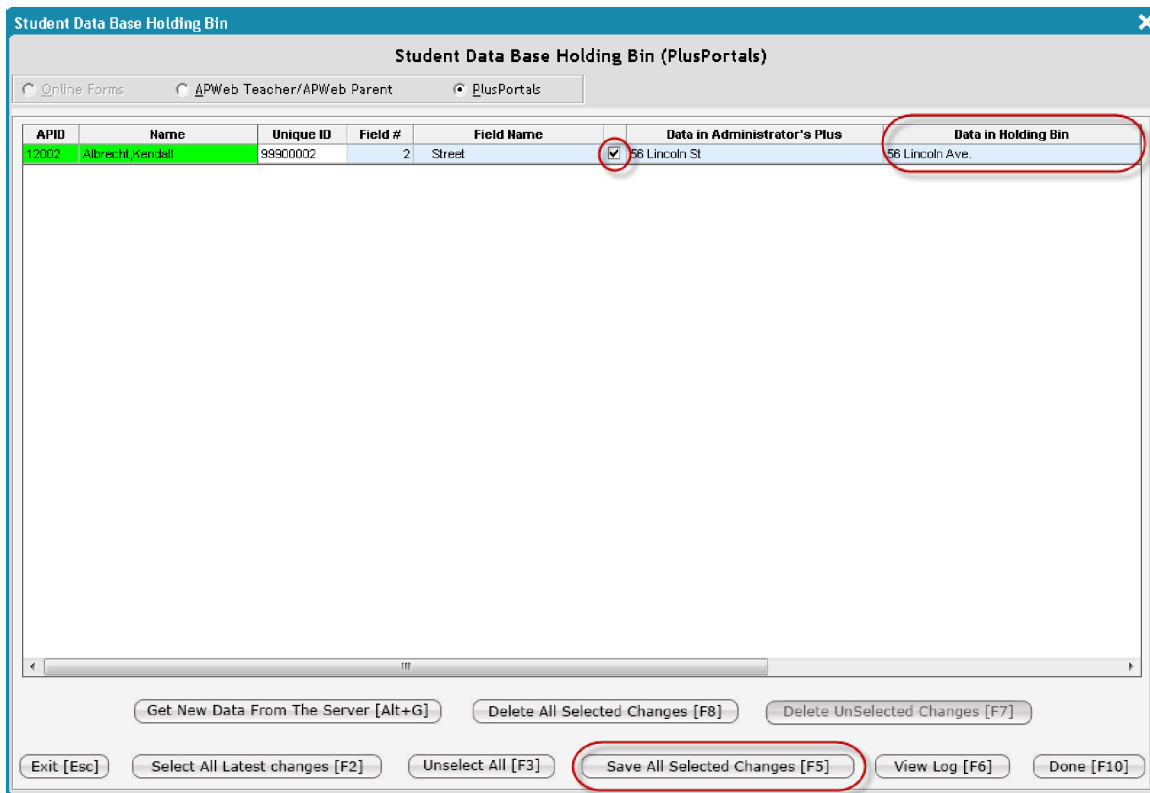
## 2.5 Receive PlusPortals Demographic Changes in AdminPlus

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**.



APID	Name	Unique ID	Field #	Field Name	Data in Administrator's Plus	Data in Holding Bin
12002	Albrecht, Kendall	99900002	2	Street	56 Lincoln St	56 Lincoln Ave.

Buttons at the bottom: Get New Data From The Server [Alt+G], Delete All Selected Changes [F8], Delete UnSelected Changes [F7], Exit [Esc], Select All Latest changes [F2], Unselect All [F3], **Save All Selected Changes [F5]**, View Log [F6], Done [F10].

# 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.

Select Recipients

Which Recipients?

☐ Admin Users ☐ Teachers ☒ Students & Parents ☐ Groups

Students from which grades?

☐ Grade Level

☐ GRADE 9

☒ GRADE 10

☐ GRADE 11

Which Students?

<input type="checkbox"/>	Recipient Name	E-Mail Address
<input type="checkbox"/>	Adams, Heather	
<input type="checkbox"/>	Alonzo, Courtney	
<input type="checkbox"/>	Arcement, Janie	

1 - 15 of 144 items

Send Email To: ☒ Students ☒ Parents

Next Cancel

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.

Create New E-Mail

New E-Mail

From

Peter Jones (P.Jones@contoso.org.uk)

To

Add Recipients

Cc

Add Recipients

Bcc

Add Recipients

Subject

Attachments

Attach File From ▾

(We highly recommend that file attachments are less than 10MB to ensure delivery of your email.)

Format ▾

**B**

*I*

U

abc

X<sub>2</sub>

X'

</>

(Inherited font) ▾

(Inherited size) ▾

A ▾

E-Mail Signature

Save

Send

⬅

Back to E-Mail

**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

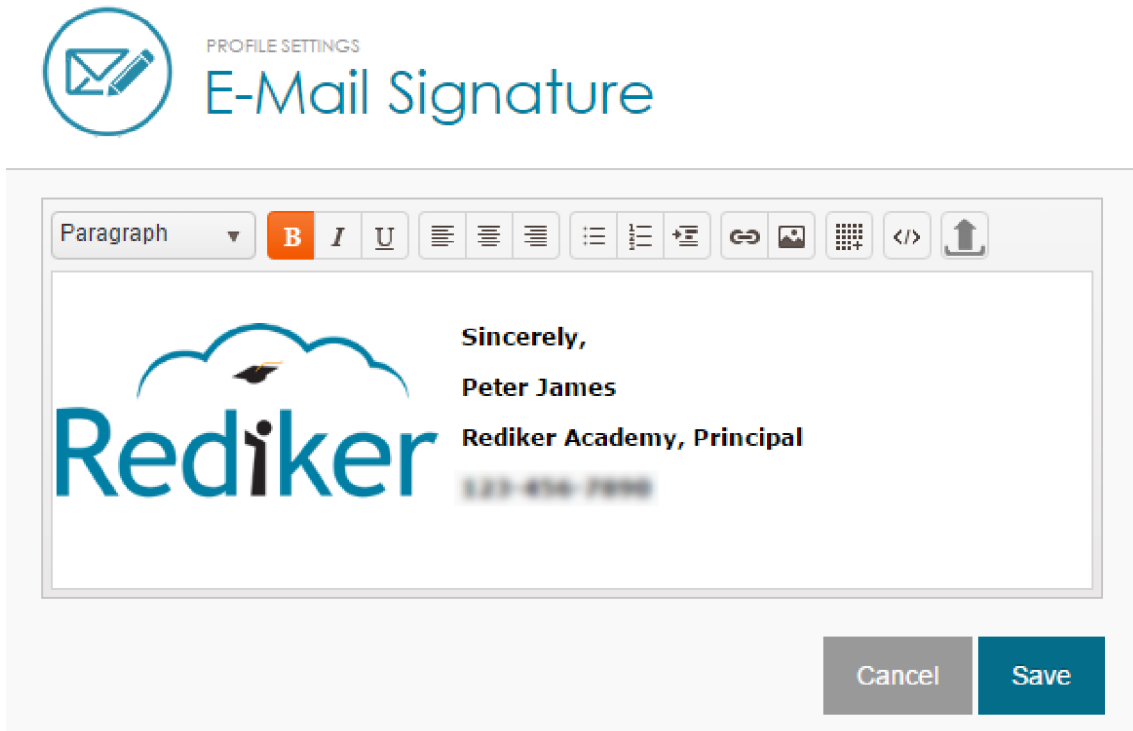
You can set a custom e-mail signature to personalize your outgoing mail. Once set, your signature will be in the text editor whenever you begin to draft a new e-mail.

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**.



The screenshot shows the 'E-Mail Signature' editor interface. At the top left is a circular icon containing an envelope and a pencil. To its right, the text 'PROFILE SETTINGS' is in small, uppercase letters, followed by 'E-Mail Signature' in a larger, blue font. Below this is a text editor box with a toolbar at the top. The toolbar includes a 'Paragraph' dropdown, bold (B), italic (I), and underline (U) buttons, followed by bulleted and numbered list icons, an indent icon, a link icon, an image icon, a table icon, a code icon, and an undo icon. The text editor box contains the Rediker logo on the left and the following text on the right: 'Sincerely,' followed by 'Peter James' and 'Rediker Academy, Principal' on separate lines. At the bottom right of the editor box are 'Cancel' and 'Save' buttons.

## 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**.

Miscellaneous			
<input checked="" type="checkbox"/> Appearance	<input checked="" type="checkbox"/> Reports/Statistics	<input checked="" type="checkbox"/> E-Mail Analytics	<input checked="" type="checkbox"/> View Groups

[Update User](#) [← Back to Manage Accounts](#)

## Statistics

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**.



E-MAIL ANALYTICS  
Statistics



E-MAIL ANALYTICS  
Activity Feed



E-MAIL ANALYTICS  
Suppressions

Search by:  
☒ E-Mail Subject ☐ Recipient

Date Range:  
Start Date:   End Date:

Subject	Date	Sender	
<a href="#">Your Notification from ANDREW ANDERLONIS SCHOOL</a>	02-15-2017 15:22:59	plusportal/Admin	
<a href="#">Your Notification from ANDREW ANDERLONIS SCHOOL</a>	02-14-2017 14:24:45	plusportal/Admin	
<a href="#">Your Notification from ANDREW ANDERLONIS SCHOOL</a>	02-14-2017 14:24:43	plusportal/Admin	
<a href="#">Your Notification from ANDREW ANDERLONIS SCHOOL</a>	02-13-2017 16:20:59	plusportal/Admin	
<a href="#">Test Email</a>	02-13-2017 14:27:25	plusportal/Admin	

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](mailto: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.

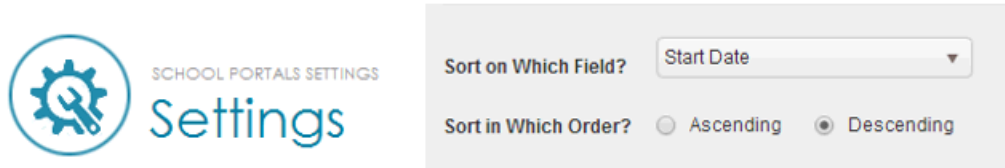
Title	<input type="text"/>		
Description	<input type="text"/>		
Start Date	<input type="text" value="6/10/2014 4:20 AM"/>  	End Date	<input type="text" value="6/10/2014 4:20 AM"/>  
Visible To	<input type="checkbox"/> Parent <input type="checkbox"/> Student <input type="checkbox"/> Staff		
File	<input data-bbox="332 1543 462 1575" type="button" value="Select file..."/>		
Link Text	<input type="text"/>		
Link URL	<input type="text"/>		
<input type="checkbox"/> Send E-Mail Notification			



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**.

The 'Event' dialog box contains the following fields and options:

- Title**: Text input field.
- Summary**: Text input field.
- Location**: Text input field.
- Visible To**: Checkboxes for ☐ Parents, ☐ Students, and ☐ Staff.
- ☐ Show on Login Page (Public)
- Start Date**: Date and time picker showing 12/07/2016 9:42 AM.
- End Date**: Date and time picker showing 12/07/2016 9:42 AM.
- All Day Event**: ☐
- Select Category**: Dropdown menu with 'Select category...' and a 'New' button.
- Repeat**: Dropdown menu with 'Never'.
- Attachments**: 'Attach File From' button.
- Link Text**: Text input field.
- Link URL**: Text input field.
- ☐ Send E-Mail Notification

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.

Filter:   New Event  Manage Events  Options ▾

---

Today ◀ ▶  2/21/2017 - 2/28/2017 Agenda ▾

Date	Time	Event
24 Friday February, 2017	8:30 AM-2:30 PM	<div><div></div> Trip to the Museum of Natural History Day trip to the Museum of Natural History. Permission slip required. Please pack a lunch, wear comfortable shoes, and have fun! Chaperones will hand out scavenger hunt worksheets. Location: Museum of Natural History</div>

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.

Send E-Mail Notification

☒ Send E-Mail to Parents

☒ Send E-Mail to Students

☐ Send E-Mail to Teachers

Subject:

Important communication from COLD SPRING SCHOOL

Description:

Format ▼

**B**

*I*

U

Subject: Trip to the Museum of Natural History

Description: Day trip to the Museum of Natural History. Permission slip required. Please pack a lunch, wear comfortable shoes, and have fun! Chaperones will hand out scavenger hunt worksheets.

Start Date: 02-24-2017

End Date: 02-24-2017

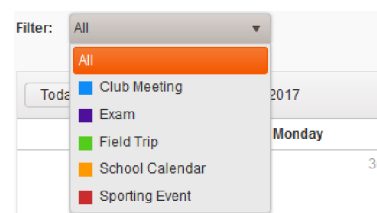
Teacher: Admin Profile

Send

Cancel

## 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:

A screenshot of the 'Event' dialog box. It has a title bar 'All Day Event' with a checkbox. Below the title bar, there is a 'Select Category' dropdown menu with 'Math Team' selected. To the right of the dropdown are three buttons: 'Edit', 'Delete', and 'New'. Below the 'Select Category' dropdown is a 'Repeat' dropdown menu with 'Never' selected.

■ 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**.

A screenshot of the 'Add Calendar Category' dialog box. It has a 'Category' text input field with 'Math Team' entered. Below it is a 'Choose Color' dropdown menu with a green color selected. At the bottom, there is a checkbox labeled 'Allow Teachers to use this category' which is checked.

**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:

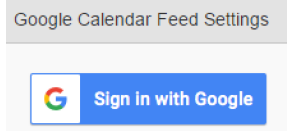
- Select the category from the drop-down list, and then click **Delete**.

3. Back in the **Event** dialog box, click **Cancel** to exit without creating an event.

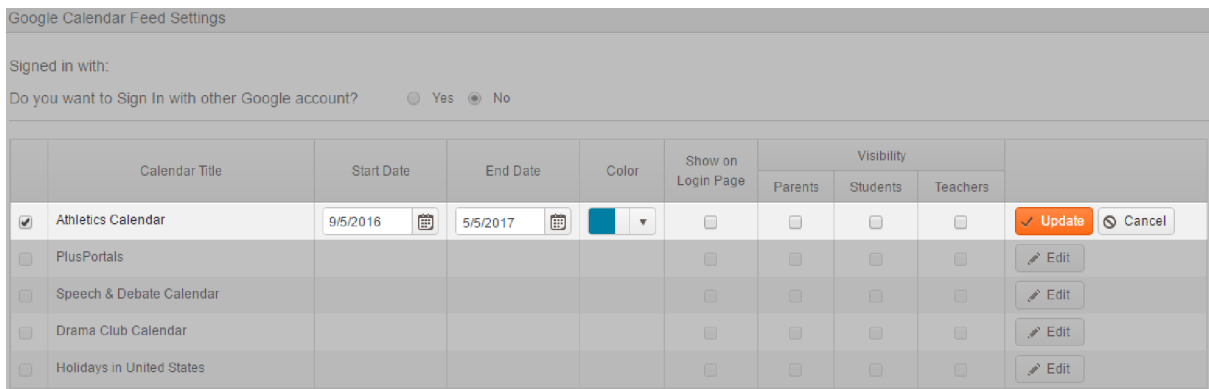
## Calendar Feed

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.

A screenshot of the 'Google Calendar Feed Settings' interface. It shows a table with columns: Calendar Title, Start Date, End Date, Color, Show on Login Page, and Visibility (Parents, Students, Teachers). The 'Athletics Calendar' is selected and highlighted. Below the table are 'Update' and 'Cancel' buttons.

	Calendar Title	Start Date	End Date	Color	Show on Login Page	Visibility			
						Parents	Students	Teachers	
<input checked="" type="checkbox"/>	Athletics Calendar	9/5/2016	5/5/2017		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="button" value="Update"/> <input type="button" value="Cancel"/>
<input type="checkbox"/>	PlusPortals				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	Speech & Debate Calendar				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	Drama Club Calendar				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>
<input type="checkbox"/>	Holidays in United States				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="Edit"/>

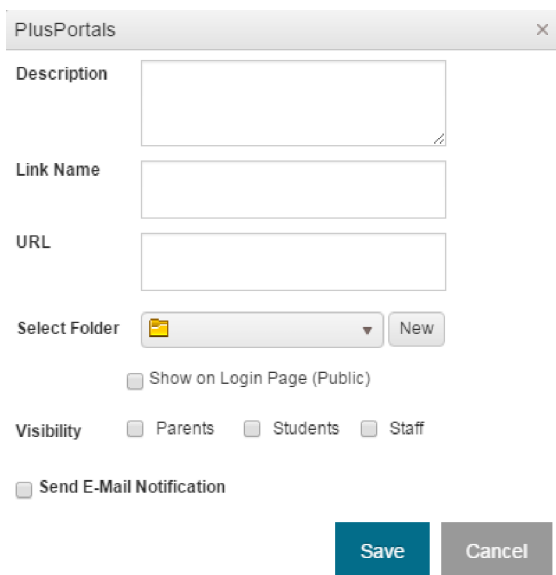
7. Click **Update** to save the calendar settings.

## 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**.



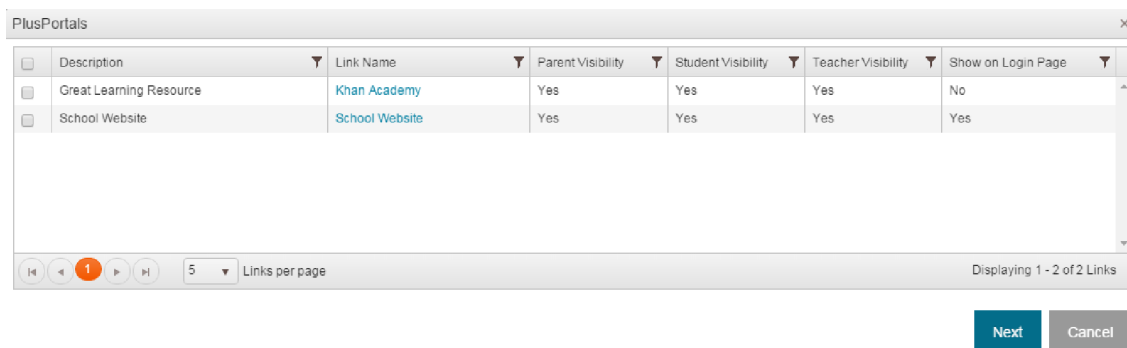
The screenshot shows a web form titled "PlusPortals" with a close button (X) in the top right corner. The form contains the following fields and options:

- Description:** A large text area with a small icon in the bottom right corner.
- Link Name:** A text input field.
- URL:** A text input field.
- Select Folder:** A dropdown menu with a folder icon and a "New" button next to it.
- ☐ **Show on Login Page (Public)**
- Visibility:** Three checkboxes: ☐ **Parents**, ☐ **Students**, and ☐ **Staff**.
- ☐ **Send E-Mail Notification**

At the bottom right of the form are two buttons: a teal **Save** button and a grey **Cancel** button.

## 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**.



The screenshot shows the 'PlusPortals' dialog box with a table of links. The table has columns for Description, Link Name, Parent Visibility, Student Visibility, Teacher Visibility, and Show on Login Page. Two links are listed: 'Great Learning Resource' (Khan Academy) and 'School Website' (School Website). Both links have 'Yes' for Parent, Student, and Teacher Visibility, and 'No' for Show on Login Page. The dialog box also includes a 'Next' button and a 'Cancel' button.

Description	Link Name	Parent Visibility	Student Visibility	Teacher Visibility	Show on Login Page
<input type="checkbox"/> Great Learning Resource	<a href="#">Khan Academy</a>	Yes	Yes	Yes	No
<input type="checkbox"/> School Website	<a href="#">School Website</a>	Yes	Yes	Yes	Yes

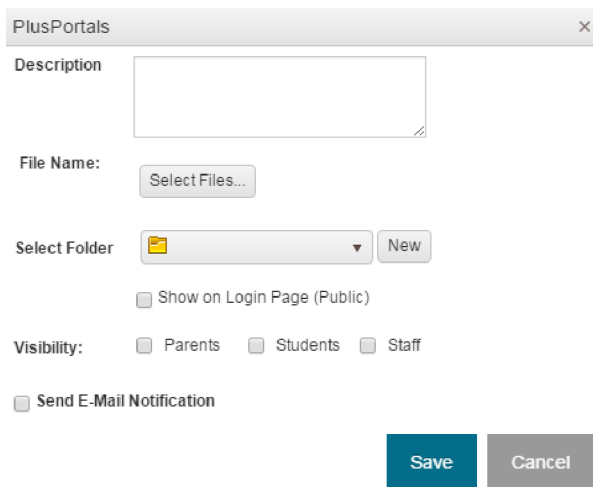
**Note:** You can select multiple links from the library at one time by selecting multiple check boxes.

## 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.



- Click **Save**.

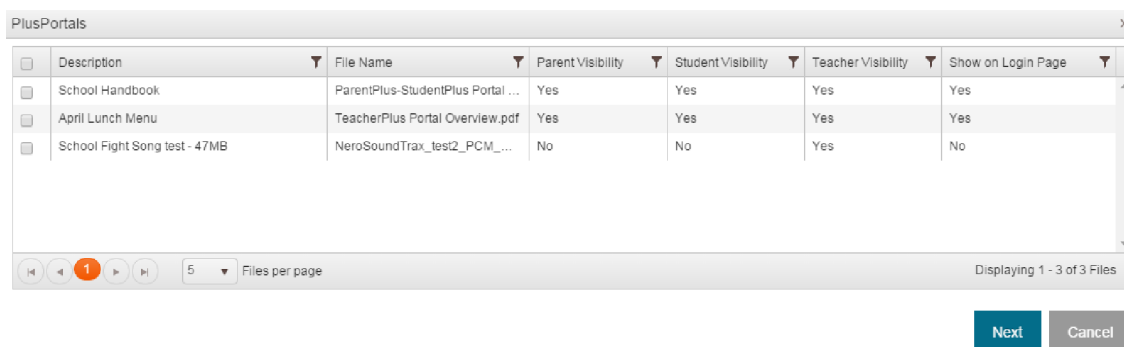


The PlusPortals form includes a description text area, a file name field with a 'Select Files...' button, a folder selection dropdown with a 'New' button, a 'Show on Login Page (Public)' checkbox, a visibility section with checkboxes for Parents, Students, and Staff, and a 'Send E-Mail Notification' checkbox. At the bottom are 'Save' and 'Cancel' buttons.

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

## Add a File from Library

- Click **Add from Library** in the **Files** panel to add a previously uploaded file.
- Select the check box next to the file you want to add.
- Click **Next**.



The PlusPortals library view displays a table with the following data:

	Description	File Name	Parent Visibility	Student Visibility	Teacher Visibility	Show on Login Page
<input type="checkbox"/>	School Handbook	ParentPlus-StudentPlus Portal ...	Yes	Yes	Yes	Yes
<input type="checkbox"/>	April Lunch Menu	TeacherPlus Portal Overview.pdf	Yes	Yes	Yes	Yes
<input type="checkbox"/>	School Fight Song test - 47MB	NeroSoundTrax_test2_PCM_....	No	No	Yes	No

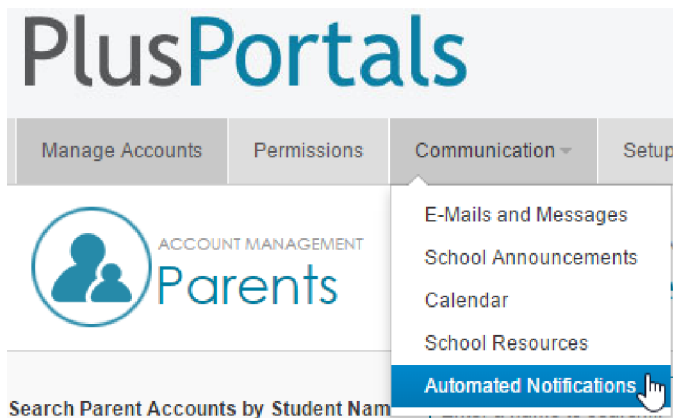
At the bottom, there are navigation controls (back, first, 1, last, forward), a '5 Files per page' dropdown, and a status bar indicating 'Displaying 1 - 3 of 3 Files'. 'Next' and 'Cancel' buttons are located at the bottom right.

**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**.

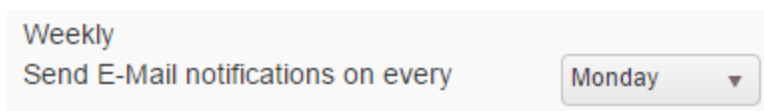


2. For the option **Enable automated notification E-Mails to Parents and Students**, do one of the following:
  - Click **Yes** to enable automated notifications and grant students and parents permission to change how frequently they want to receive automated notifications.
  - Click **No** if you want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



Enable automated notification E-Mails to Parents and Students ☒ Yes ☐ No

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.



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.

Every Two Weeks  
Send E-Mail notifications on every other Friday ▼

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.

Monthly  
☒ Day 15 ▲▼ of every month  
☐ The First ▼ Monday ▼ of every month

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.

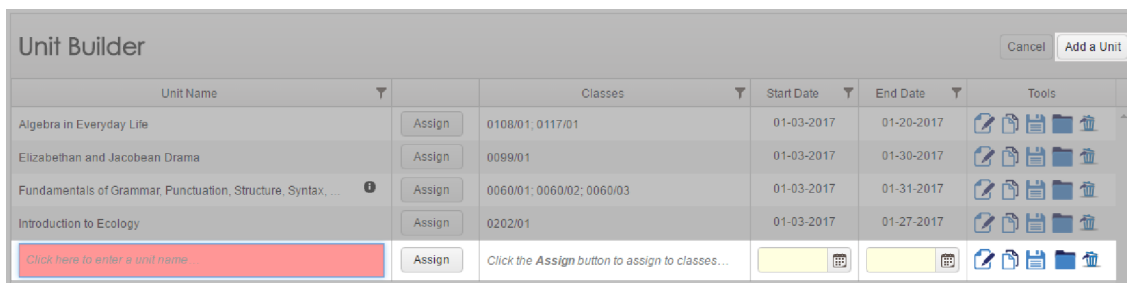
When creating a unit, you can do the following:

- 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**.



The screenshot shows the 'Unit Builder' interface. At the top right, there are 'Cancel' and 'Add a Unit' buttons. Below is a table with columns: Unit Name, Assign, Classes, Start Date, End Date, and Tools. The table lists four existing units: 'Algebra in Everyday Life', 'Elizabethan and Jacobean Drama', 'Fundamentals of Grammar, Punctuation, Structure, Syntax, ...', and 'Introduction to Ecology'. At the bottom, there is a new unit entry with a red highlight on the 'Unit Name' field, which contains the placeholder text 'Click here to enter a unit name...'. The 'Assign' button for this new unit is also visible.

Unit Name	Assign	Classes	Start Date	End Date	Tools
Algebra in Everyday Life	Assign	0108/01; 0117/01	01-03-2017	01-20-2017	[Icons]
Elizabethan and Jacobean Drama	Assign	0099/01	01-03-2017	01-30-2017	[Icons]
Fundamentals of Grammar, Punctuation, Structure, Syntax, ...	Assign	0060/01; 0060/02; 0060/03	01-03-2017	01-31-2017	[Icons]
Introduction to Ecology	Assign	0202/01	01-03-2017	01-27-2017	[Icons]
Click here to enter a unit name...	Assign	Click the Assign button to assign to classes...			[Icons]


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 **i** 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.

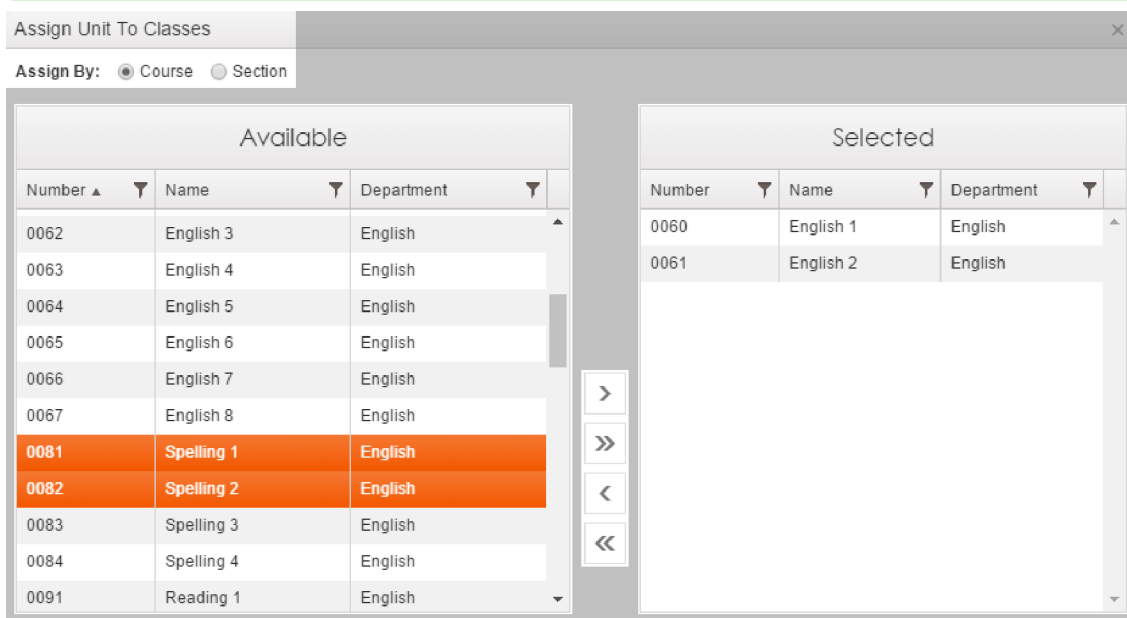
4. Next to the new unit name, click **Assign**.

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.



Assign Unit To Classes

Assign By: ☒ Course ☐ Section

Available		
Number	Name	Department
0062	English 3	English
0063	English 4	English
0064	English 5	English
0065	English 6	English
0066	English 7	English
0067	English 8	English
0081	Spelling 1	English
0082	Spelling 2	English
0083	Spelling 3	English
0084	Spelling 4	English
0091	Reading 1	English

Selected		
Number	Name	Department
0060	English 1	English
0061	English 2	English



Navigation buttons: > >> < <<



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 .

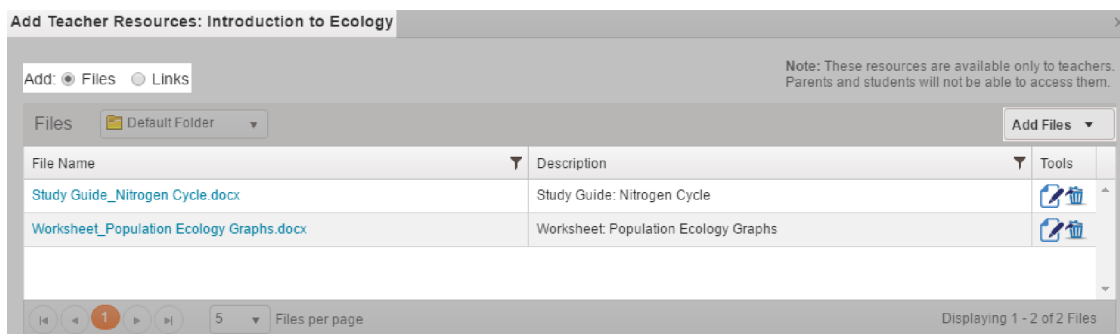
## Add Teacher Resources to a Unit

1. On the main navigation bar, click **Setup > Unit Builder**.
2. In **Tools**, next to the unit you want to edit, click .  
Clicking  opens the **Add Teacher Resources** dialog box.

**Tip:** Once you add files or links to the **Teacher Resources** folder,  changes to  to reflect the addition of these files or links.

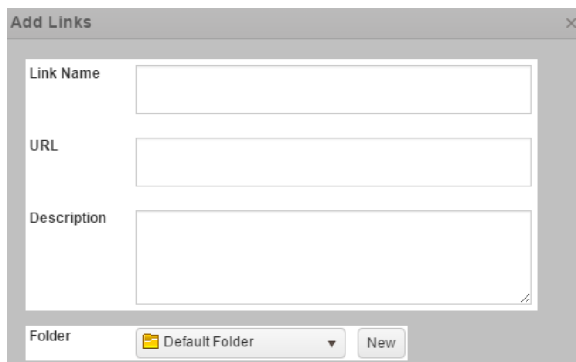
3. To add files, click **Files**, click **Add Files**, choose a file to upload, and then click **Done**.

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

Select the unit from which the content should be copied.

	Unit Name	Classes	Start Date	End Date	
<input type="checkbox"/>	Algebra in Everyday Life	0108/01	01-03-2017	01-20-2017	▲
<input type="checkbox"/>	Elizabethan and Jacobean Drama	0099/01	01-03-2017	01-30-2017	
<input type="checkbox"/>	Fundamentals of Grammar, Punct..	0060/01; 0060/02; 0060/03	01-03-2017	01-31-2017	
<input checked="" type="checkbox"/>	Introduction to Ecology	0202/01	01-03-2017	01-27-2017	




Navigation:   **1**   10 Units per page Displaying 1 - 4 of 4 Units

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 .

## 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 , make your changes, and then click .
  - To delete, click , 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.

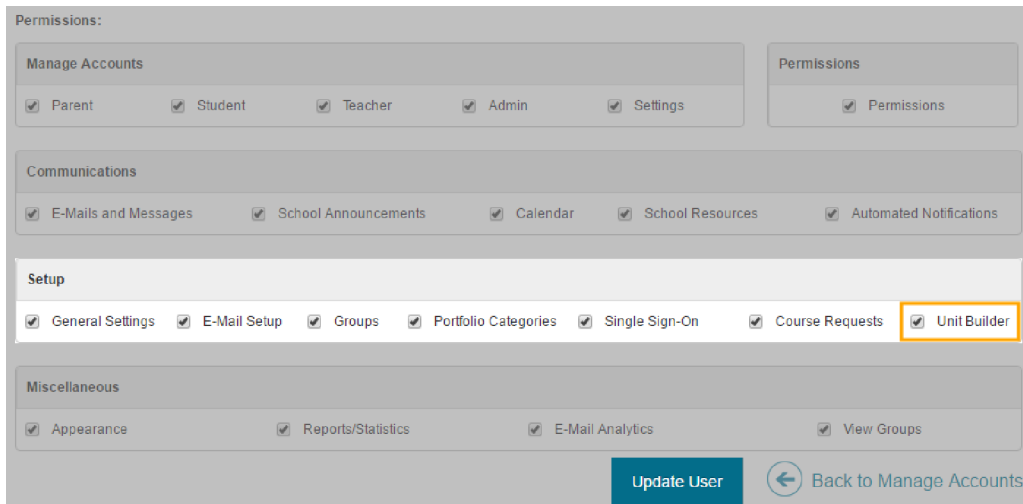
When setting unit permissions, you can do the following:

- 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**.



The screenshot shows the 'Update User' interface with the 'Permissions' section expanded. The 'Setup' group box is active, displaying several checkboxes, all of which are checked. The 'Unit Builder' checkbox is highlighted with an orange border. At the bottom right, there is a blue 'Update User' button and a 'Back to Manage Accounts' link with a left arrow icon.

Permissions:
<b>Manage Accounts</b>
<input checked="" type="checkbox"/> Parent <input checked="" type="checkbox"/> Student <input checked="" type="checkbox"/> Teacher <input checked="" type="checkbox"/> Admin <input checked="" type="checkbox"/> Settings
<b>Communications</b>
<input checked="" type="checkbox"/> E-Mails and Messages <input checked="" type="checkbox"/> School Announcements <input checked="" type="checkbox"/> Calendar <input checked="" type="checkbox"/> School Resources <input checked="" type="checkbox"/> Automated Notifications
<b>Setup</b>
<input checked="" type="checkbox"/> General Settings <input checked="" type="checkbox"/> E-Mail Setup <input checked="" type="checkbox"/> Groups <input checked="" type="checkbox"/> Portfolio Categories <input checked="" type="checkbox"/> Single Sign-On <input checked="" type="checkbox"/> Course Requests <input checked="" type="checkbox"/> <b>Unit Builder</b>
<b>Miscellaneous</b>
<input checked="" type="checkbox"/> Appearance <input checked="" type="checkbox"/> Reports/Statistics <input checked="" type="checkbox"/> E-Mail Analytics <input checked="" type="checkbox"/> View Groups

[Update User](#) [Back to Manage Accounts](#)

## 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.

### Teacher Permissions

☒ Allow teachers to edit the content of Units created by administrators? ⓘ

☒ Allow teachers to create Units? ⓘ

☒ Allow teachers to add files and links to Teacher Resources? ⓘ

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

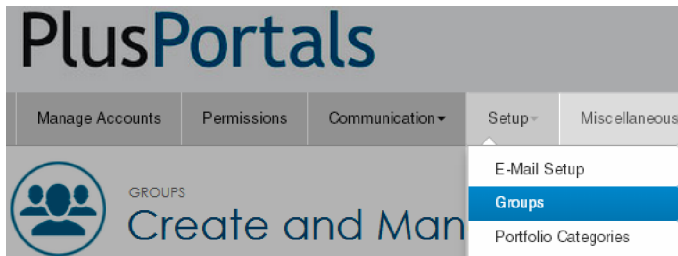
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## 5.1 Create a Group

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**.



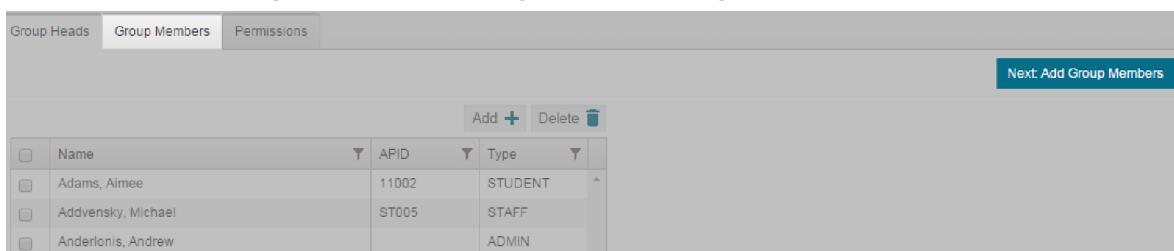
2. Click **New Group**.
3. Name the Group, give it a description, and set the visibility settings.

The screenshot shows the 'New Group' form. It has two input fields: 'Group Name' with the value 'Math Team' and 'Description' with the value 'Grades 9-12'. Below these fields are two checkboxes: 'Visible to Group Members' (checked) and 'Public Group (Group Page and Calendar Visible to All)' (checked).

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**

<input type="checkbox"/>	Grade Level
<input type="checkbox"/>	GRADE K
<input type="checkbox"/>	GRADE 1
<input type="checkbox"/>	GRADE 2
<input checked="" type="checkbox"/>	GRADE 3

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

**Students matching DB criteria**

City	Contains	Wilbraham	And
State	Contains	Massachusetts	

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

Select Group Members ×

2 of 3 users selected.  
Students from which grades?

<input type="checkbox"/>	Grade Level
<input type="checkbox"/>	GRADE K
<input type="checkbox"/>	GRADE 1
<input type="checkbox"/>	GRADE 2
<input checked="" type="checkbox"/>	GRADE 3

Which Students?

<input type="checkbox"/>	User Name	APID
<input checked="" type="checkbox"/>	Cowley, Carol	03002
<input checked="" type="checkbox"/>	Geraldo, Ricky	03003
<input type="checkbox"/>	Wurth, Jessica	03001

- 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**

Position ▼ Contains ▼ Teacher And ▼

Homeroom ▼ Contains ▼ 3

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

**Individual Staff** Add + Delete

<input type="checkbox"/>	Name ▼	APID ▼
<input type="checkbox"/>	Addvensky, Michael	ST005
<input type="checkbox"/>	Baldassaro, Tanya	ST006
<input type="checkbox"/>	Barrios, Kim	ST007

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:

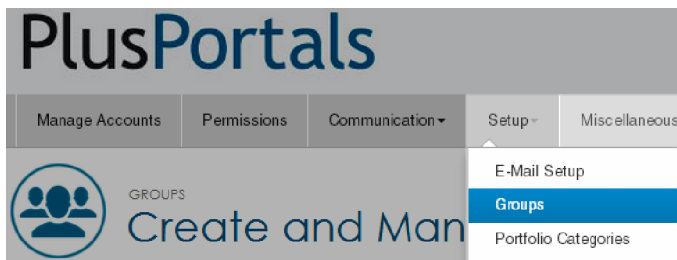
- For staff: Assign them a staff account in the TeacherPlus Gradebook Sync Manager in AdminPlus, and they can log in to the portal and have access to the group without having any classes.
- For administrators: Assign the users an admin account, and they can access it from the admin portal.



## 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.

Group Name	Description	Group Head(s)	View/Manage	
5th and 6th Grade Counselor	5th and 6th Grade Counseling Grade Access	David, Pooley(STAFF)		Delete
Admin Group				Delete
Drawing Club		Your School, Administration(ADMIN);David, Pooley(STAFF)		Delete
Grade 11		Your School, Administration(ADMIN)		Delete
Guidance Counselor	Access to Staff and Students	Your School, Administration(ADMIN)		Delete
Male/Female		Your School, Administration(ADMIN)		Delete
Math Team	A group of students involved in Math Team.	Aimee, Adams(STUDENT);Michael, Addvensky(STAFF);Andrew , Anderlonis(ADMIN)		Delete

10 Groups per page      Displaying 1 - 10 of 18 Groups

3. Click the **Permissions** tab.

Group Heads				
Group Members				
Permissions				
Add +    Delete				
<input type="checkbox"/>	Name	APID	Type	
<input type="checkbox"/>	Adams, Aimee	11002	STUDENT	
<input type="checkbox"/>	Addvensky, Michael	ST005	STAFF	
<input type="checkbox"/>	Anderlonis, Andrew		ADMIN	

4. Select any permissions specifications you want to apply to this group.

The screenshot shows the 'Permissions' tab of a group configuration interface. It includes sections for email permissions, page access for group heads, and demographic field visibility. Callouts A, B, C, and D highlight specific areas: A points to the top permissions checkboxes, B points to the email permissions section, C points to the page access sections, and D points to the demographic fields list.

Group Heads Group Members Permissions

**A** ☐ Allow group heads to view E-Portfolio ☐ Allow group heads to view contacts

**B** Select who group members are allowed to send email to:  
☒ Group Heads ☒ Group Members ☐ Parents of the Students

Select the pages which can be accessed by group head:

**C** Student Pages:  
☐ Demographics ☐ Attendance ☐ Report Card  
☐ Schedule ☐ Discipline ☐ Classes  
☐ Lesson Plans ☐ Scores ☐ Reports

Teacher Pages:  
☐ Progress ☐ Students ☐ Attendance  
☐ Scores ☐ Homework ☐ Announcement  
☐ Resources ☐ Lesson Planner ☐ Schedule

Show which demographic fields?  
☐ Demographics  
☐ Parent/Guardian  
☐ Street **D**  
☐ City  
☐ State  
☐ ZIP  
☐ Phone

Save Group Back to Group

### Group Permissions Overview

- |          |  |
|----------|--|
| <b>A</b> | Choose whether to provide the group head with access to E-Portfolios and student contacts. |
| <b>B</b> | Set e-mail permissions for group members.  |
| <b>C</b> | Select which student and teacher pages the group head can access.                          |
| <b>D</b> | 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

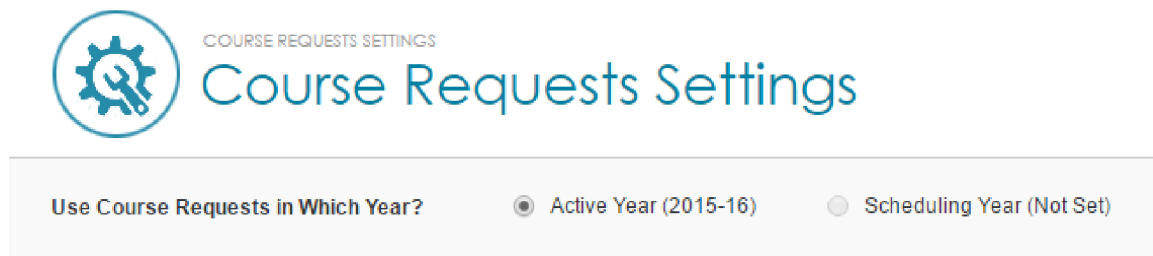
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## 6.1 Course Request Settings

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.



COURSE REQUESTS SETTINGS

### Course Requests Settings

Use Course Requests in Which Year?

☒ Active Year (2015-16) ☐ Scheduling Year (Not Set)

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.

The screenshot shows the Course Catalog interface. On the left is a table with columns: Course #, Course Name, and Department. The row for Course # 0053, Course Name 'Cr Writing', and Department 'English' is highlighted in orange. To the right of the table is a form for editing the selected course. The form includes fields for Course # (0053), Level (III), Course Name (Cr Writing), Course Length (Quarter), Department (English), and Credits (0.25). Below these fields is a text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and table. The text editor contains the following text:

**Creative Writing**

This course focuses on creative writing and various writing practices. We will be examining a variety of authors who specialize in creative writing and students will learn more about the peer-editing process to improve their own writing.

Collaboration is a major aspect of this course and students who are interested in creative writing and teamwork are encouraged to take this course.

At the bottom of the form are two buttons: 'Add from Library' and 'Save'.

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**.

The screenshot shows the 'Form Name' and 'Description' fields. The 'Form Name' field contains '2nd Semester Course Requests'. The 'Description' field has a rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, insert table, and a grid icon. Below the toolbar, there are dropdowns for 'Format' (set to '(inherited font)') and '(inherited size)', followed by icons for text color and background color. The main text area contains the text 'Course Requests for the 2nd Semester'. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Next: Add Section'.

Form Name: 2nd Semester Course Requests

Description:

Course Requests for the 2nd Semester

Cancel Save Next: Add Section

6. Add a name for this section in the **Section Name** text box.

Section Name:

Description:

**B** *I* U **abc**

Format (inherited font) (inherited size) **A**

Science Courses

Select Course Group:  **Add/Edit Course Group**

Allow Multiple Selection: ☒ Yes ☐ No

Minimum Selection:

Maximum Selection:

**Back to Course Form** **Cancel** **Save**

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**.

**Groups**

Course Group Name:

Course #	Course Name
0243	Appl Phys
0242	C Physics
0241	Hon Physic

Course Group Name:

Course #	Course Name
0243	Appl Phys
0242	C Physics
0241	Hon Physic

**New** **Delete** **Add Course** **Remove Course** **Save** **Cancel**



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.

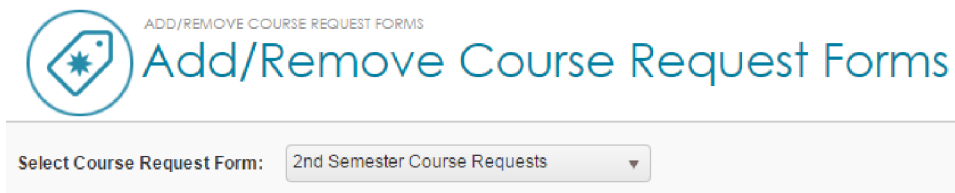
11. Click **Back to Course Form** when you've completed your form.

## 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.

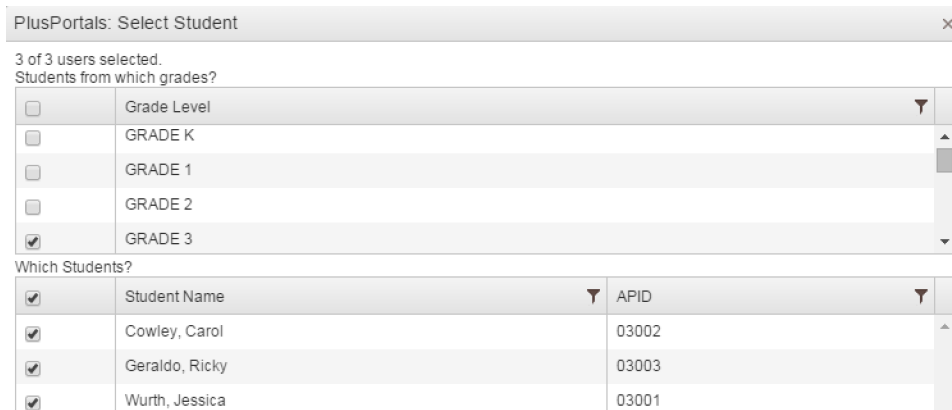


ADD/REMOVE COURSE REQUEST FORMS

### Add/Remove Course Request Forms

Select Course Request Form: 2nd Semester Course Requests ▼

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.



PlusPortals: Select Student

3 of 3 users selected.  
Students from which grades?

<input type="checkbox"/>	Grade Level
<input type="checkbox"/>	GRADE K
<input type="checkbox"/>	GRADE 1
<input type="checkbox"/>	GRADE 2
<input checked="" type="checkbox"/>	GRADE 3

Which Students?

<input checked="" type="checkbox"/>	Student Name	APID
<input checked="" type="checkbox"/>	Cowley, Carol	03002
<input checked="" type="checkbox"/>	Geraldo, Ricky	03003
<input checked="" type="checkbox"/>	Wurth, Jessica	03001

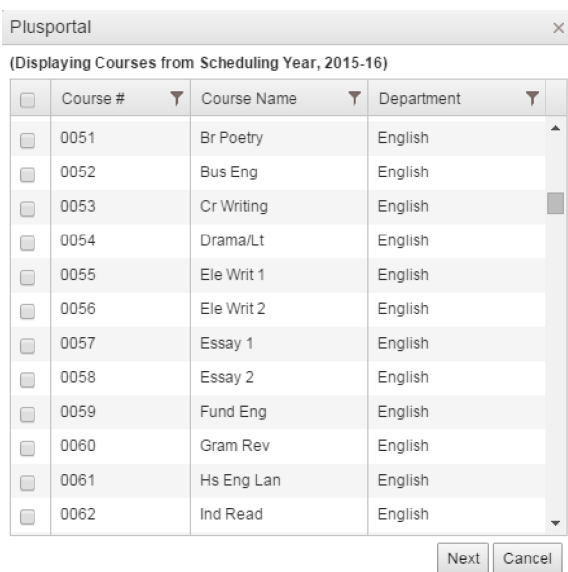
5. Click **Next** to publish the form.

## 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**.



Plusportal

(Displaying Courses from Scheduling Year, 2015-16)

<input type="checkbox"/>	Course #	Course Name	Department
<input type="checkbox"/>	0051	Br Poetry	English
<input type="checkbox"/>	0052	Bus Eng	English
<input type="checkbox"/>	0053	Cr Writing	English
<input type="checkbox"/>	0054	Drama/Lt	English
<input type="checkbox"/>	0055	Ele Writ 1	English
<input type="checkbox"/>	0056	Ele Writ 2	English
<input type="checkbox"/>	0057	Essay 1	English
<input type="checkbox"/>	0058	Essay 2	English
<input type="checkbox"/>	0059	Fund Eng	English
<input type="checkbox"/>	0060	Gram Rev	English
<input type="checkbox"/>	0061	Hs Eng Lan	English
<input type="checkbox"/>	0062	Ind Read	English

Next Cancel

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:

Highlight a student to view/edit course recommendations

APID	Student Name
11001	Abuliel, Jordan
11002	Adams, Aimee
10001	Adams, Heather
11003	Adams, Kirsten
11004	Addvensky, Ashley
11005	Allen, Kristen
11129	Zander, Ariel

Student: Adams, Aimee

Courses: (Highlight a course to view recommendations)

Course #	Course Name	Department
0243	Appl Phys	Science
0242	C Physics	Science
0012	Col Fr Eng	English
0014	Dev Fr Eng	English
0011	FR English	English
0013	FrEnglish2	English
0241	Hon Physic	Science

Recommendations: Aimee would make a great candidate for this advanced level of Physics...

APID: 11002 [Edit](#)

[Batch Add Course Requests](#)
[Batch Remove Course Requests](#)
[Add Course Requests](#)
[Remove Selected Course Requests](#)

### 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

- On the main navigation bar, click **Setup > Course Request**, and click **Course Recommendations**.
- Click **Batch Add Course Requests**.
- In the **Students from which grades** area, select the grade the students are currently in.

Plusportal

(Displaying Courses from Scheduling Year, 2015-16)

Course #	Course Name	Department
0052	Bus Eng	English
0053	Cr Writing	English
0054	Drama/Lt	English
0055	Ele Writ 1	English
0056	Ele Writ 2	English
0057	Essay 1	English
0058	Essay 2	English
0059	Fund Eng	English
0060	Gram Rev	English
0061	Hs Eng Lan	English
0062	Ind Read	English
0063	Ind Write	English
0064	Journalism	English
0065	Lt Adol 1	English
0066	Lt Adol 2	English
0067	Lt Soc Crt	English
0068	Lt Women	English

3 of 3 users selected.

Students from which grades?

Grade Level
GRADE 1
GRADE 2
GRADE 3
GRADE 4

Which Students?

Student Name	APID
Cowley, Carol	03002
Geraldo, Ricky	03003
Wurth, Jessica	03001

Next Cancel

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:

Plusportal

(Displaying Courses from Scheduling Year, 2015-16)

<input type="checkbox"/>	Course #	Course Name	Department
<input type="checkbox"/>	0052	Bus Eng	English
<input checked="" type="checkbox"/>	0053	Cr Writing	English
<input type="checkbox"/>	0054	Drama/Lt	English
<input checked="" type="checkbox"/>	0055	Ele Writ 1	English
<input type="checkbox"/>	0056	Ele Writ 2	English
<input type="checkbox"/>	0057	Essay 1	English
<input type="checkbox"/>	0058	Essay 2	English
<input type="checkbox"/>	0059	Fund Eng	English
<input type="checkbox"/>	0060	Gram Rev	English
<input type="checkbox"/>	0061	Hs Eng Lan	English
<input type="checkbox"/>	0062	Ind Read	English
<input type="checkbox"/>	0063	Ind Write	English
<input type="checkbox"/>	0064	Journalism	English
<input type="checkbox"/>	0065	Lt Adol 1	English
<input type="checkbox"/>	0066	Lt Adol 2	English
<input type="checkbox"/>	0067	Lt Soc Crt	English
<input type="checkbox"/>	0068	Lt Women	English

3 of 3 users selected.

Students from which grades?

<input type="checkbox"/>	Grade Level
<input type="checkbox"/>	GRADE 1
<input type="checkbox"/>	GRADE 2
<input checked="" type="checkbox"/>	GRADE 3
<input type="checkbox"/>	GRADE 4

Which Students?

<input checked="" type="checkbox"/>	Student Name	APID
<input checked="" type="checkbox"/>	Cowley, Carol	03002
<input checked="" type="checkbox"/>	Geraldo, Ricky	03003
<input checked="" type="checkbox"/>	Wurth, Jessica	03001

Next Cancel


### Batch Course Recommendation Overview

- A** Select a grade from this table to view the students enrolled.
- B** Select the students from this table to add a course request or remove a course request.
- C** Select a course from this table to add a course request or remove a course request.

## 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.

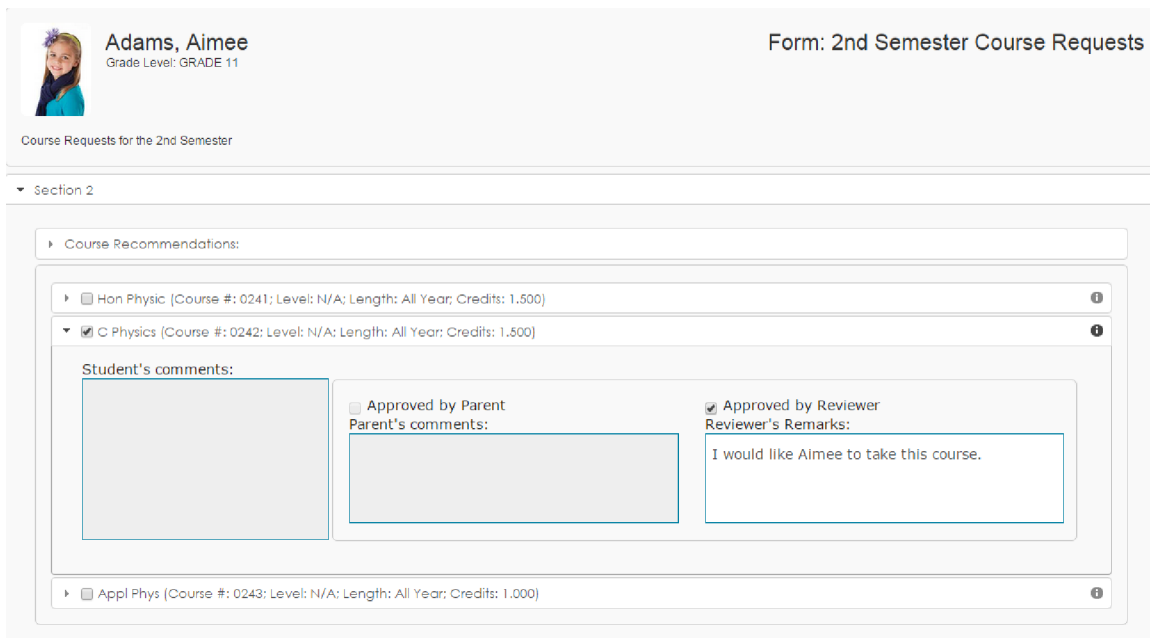
**Note:** When a student has requested a course, the check box next to the course title is selected.

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.



Adams, Aimee  
Grade Level: GRADE 11

Form: 2nd Semester Course Requests

Course Requests for the 2nd Semester

Section 2

Course Recommendations:

- ☐ Hon Physic (Course #: 0241; Level: N/A; Length: All Year; Credits: 1.500)
- ☒ C Physics (Course #: 0242; Level: N/A; Length: All Year; Credits: 1.500)
  - Student's comments:
  - ☐ Approved by Parent  
Parent's comments:
  - ☒ Approved by Reviewer  
Reviewer's Remarks:  
I would like Aimee to take this course.
- ☐ Appl Phys (Course #: 0243; Level: N/A; Length: All Year; Credits: 1.000)

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:

Select Course Request Form: 2nd Semester Course Requests							Approve Selected Course Requests
<b>A</b>	Student Name	APID	Date Added <b>B</b>	Date Submitted <b>C</b>	Date Reviewed <b>D</b>	Date Received <b>E</b>	View
<input type="checkbox"/>	Abuliel, Jordan	11001	08-10-2015	08-10-2015			
<input type="checkbox"/>	Adams, Aimee	11002	08-10-2015	08-10-2015	08-11-2015	08-11-2015	

### Overview of Review Requests Features

- |          |   |
|----------|---|
| <b>A</b> | 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. |
| <b>B</b> | This is the date that the students were given access to this form.  |
| <b>C</b> | This is the date that the student submitted the course request form.  |
| <b>D</b> | This is the date that you reviewed and approved the course request form.  |
| <b>E</b> | This is the date that the office received the course request form.  |

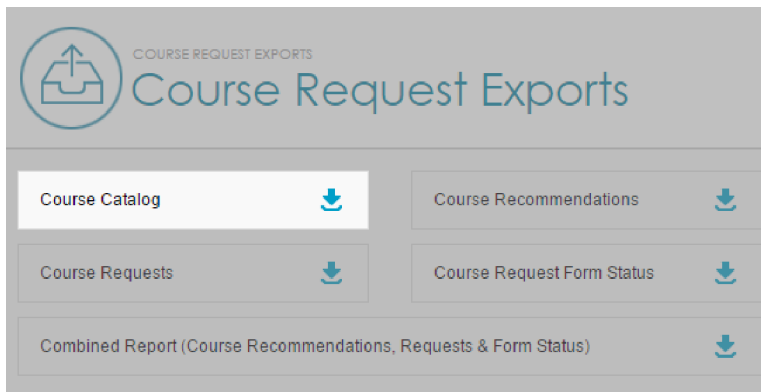
## 6.7 Export Course Requests

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:

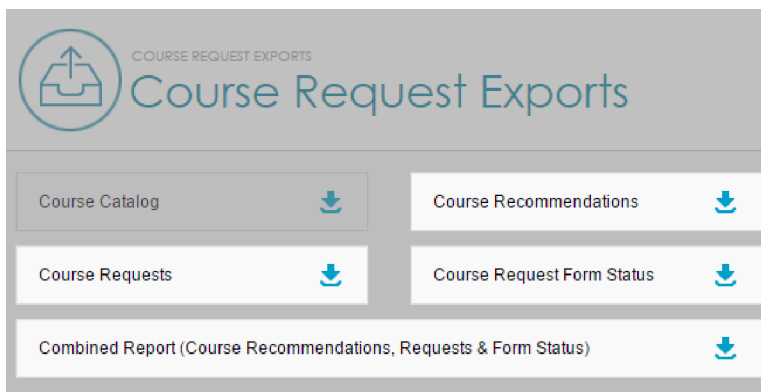
1. On the main navigation bar, click **Setup > Course Requests**, and then click **Course Request Exports**.
2. Click **Course Catalog**.



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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