

# Portfolios

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## Introduction

A portfolio is an electronic folder that is a part of each student's record. These portfolio folders can contain any type of file including documents, sound clips and pictures. If you have the storage space, you can even add movie clips of recitals, plays, or speeches.

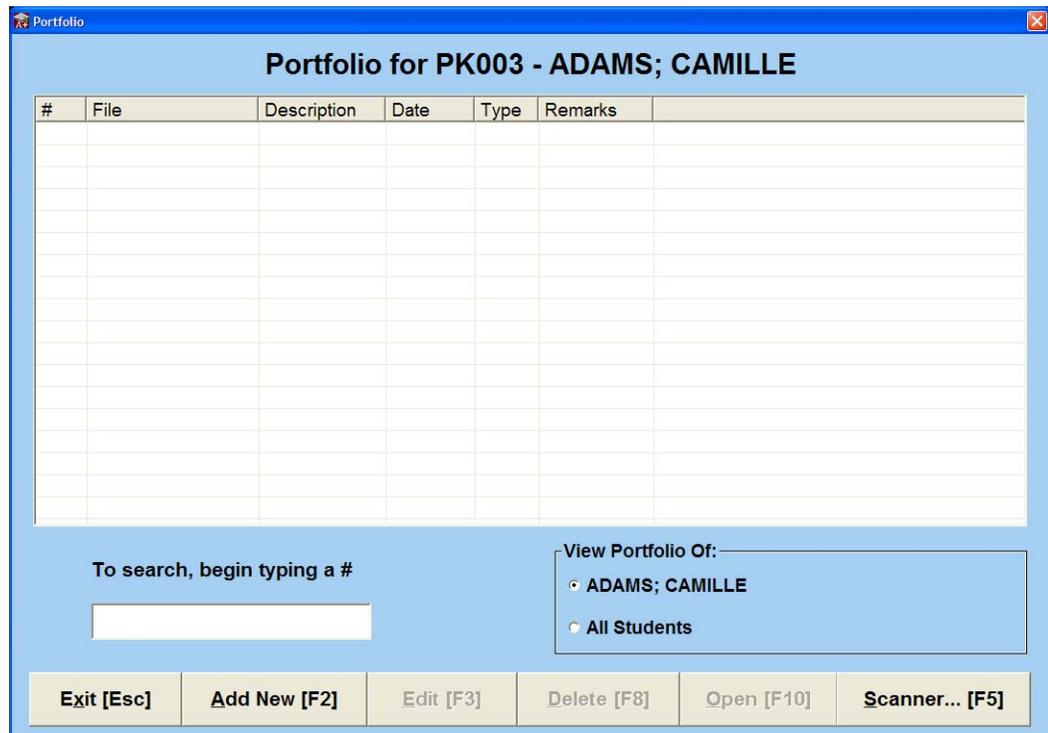
Administrators Plus can automatically add any document it produces to students' portfolios as PDF documents. For example, in one step you can create report cards for 1,000 students, send them home using Administrator's Plus E-Mail and at the same time store a PDF copy in each student's portfolio folder! Moreover, copies of attendance, discipline and other letters can automatically be added to portfolios whenever they are generated. When it comes time to produce a transcript for a student, there is no need to generate a new one, just reprint the last one in the portfolio.

Documents may also be manually added to portfolios by dragging and dropping them directly into the Portfolio window or by using a scanner. Portfolios can also be maintained for staff members.

**NOTE:** *The Portfolio feature must be purchased separately.*

## The Portfolio Window

After selecting a student in the Data Base Address program, you can click the Portfolio button to display the *Portfolio* window.



The following table describes the features found in this window, starting in the top-left corner, top to bottom.

## **Portfolio Window Features**

<b>Window Feature</b>	<b>Description</b>
#	This column shows you the total number of files added to the student's portfolio.
File	This is the name of the file.
Description	When adding a file to a portfolio, you have the option of entering a description of the file itself. That description appears in this column.
Date	This is the date on which the file was added to a portfolio.
Type	The file type.
Remarks	When adding a file to a portfolio, you have the option of entering comments about the file's source document, such as why this document would demonstrate a student's best work. Those comments would appear in this column.
To search, begin typing...	This field allows you to search within a select column.
View Portfolio Of:	Lets you choose whether to view just the portfolio files of the selected student, or all student portfolios.
Exit	Closes the <i>Portfolio</i> window.
Add New	Allows you to add new portfolio files. See "Adding Files to a Portfolio" on page 1-4 to learn how to do this.
Edit	Allows you to edit existing portfolio files. See "Editing Portfolio Files" on page 1-9 to learn how to do this.
Delete	Removes the selected files from the portfolio.
Open	Opens the selected document for viewing.
Scanner	Allows you to scan documents and add it to a portfolio. See "Scanning Documents Into Portfolios" on page 1-10 to learn how to do this.

## Adding Files to a Portfolio

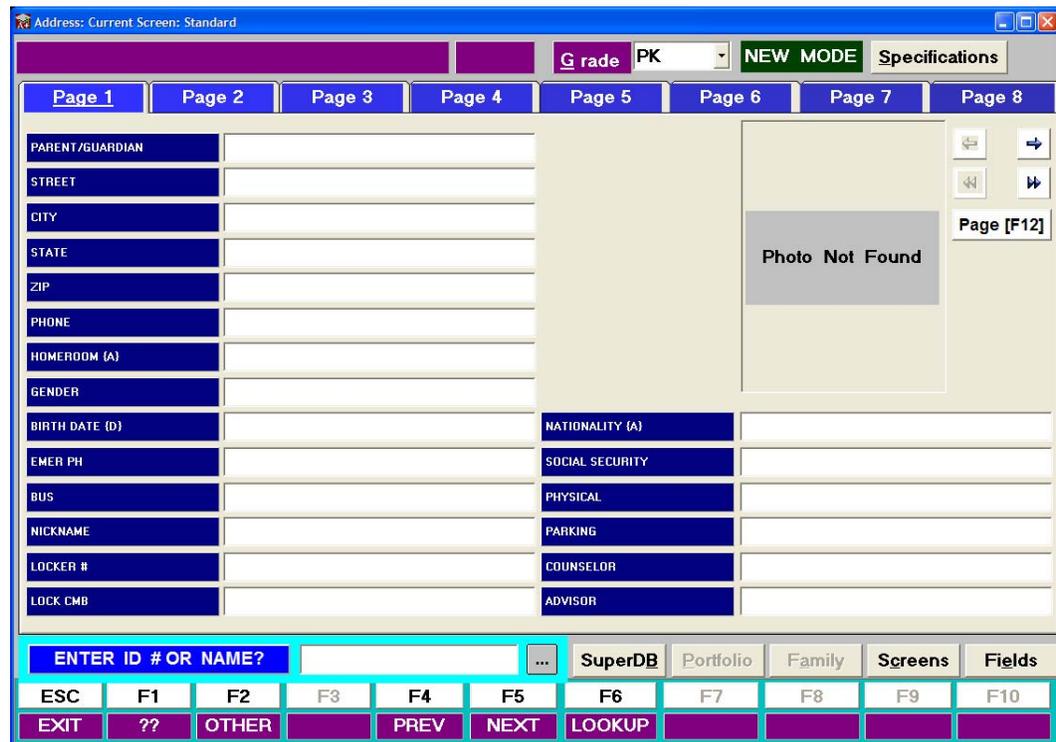
Use the following procedure to add electronic documents to portfolios. When you add a file to portfolio, a copy of that file is added to the portfolio under the RS4 folder. This ensures that all portfolio information is stored in one convenient network location where all Administrator's Plus users have access. You can sort the list of files that comprise a student's portfolio by date, file type, description, or remarks.

### To Add Files to a Portfolio:



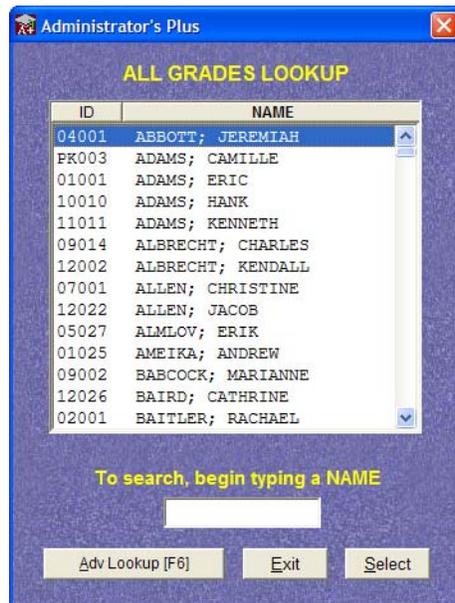
1 In the Data Base module, click the Address icon.

The main *Address* window appears.

A screenshot of the "Address" window in a database application. The window title is "Address: Current Screen: Standard". It features a menu bar with "G rade PK", "NEW MODE", and "Specifications". Below the menu bar are tabs for "Page 1" through "Page 8". The main area contains a form with fields for "PARENT/GUARDIAN", "STREET", "CITY", "STATE", "ZIP", "PHONE", "HOMEROOM (A)", "GENDER", "BIRTH DATE (D)", "EMER PH", "BUS", "NICKNAME", "LOCKER #", "LOCK CMB", "NATIONALITY (A)", "SOCIAL SECURITY", "PHYSICAL", "PARKING", "COUNSELOR", and "ADVISOR". A "Photo Not Found" message is displayed in a box on the right. At the bottom, there is a search bar labeled "ENTER ID # OR NAME?" and a row of function keys: ESC, F1, F2, F3, F4, F5, F6, F7, F8, F9, F10. Below the function keys is a row of buttons: EXIT, ??, OTHER, PREV, NEXT, LOOKUP.

2 Click F6 Lookup, or use the browse button for the *Enter ID # or Name* field.

The *All Grades Lookup* window appears.



- 3 Choose your student from the list, and then click Select.

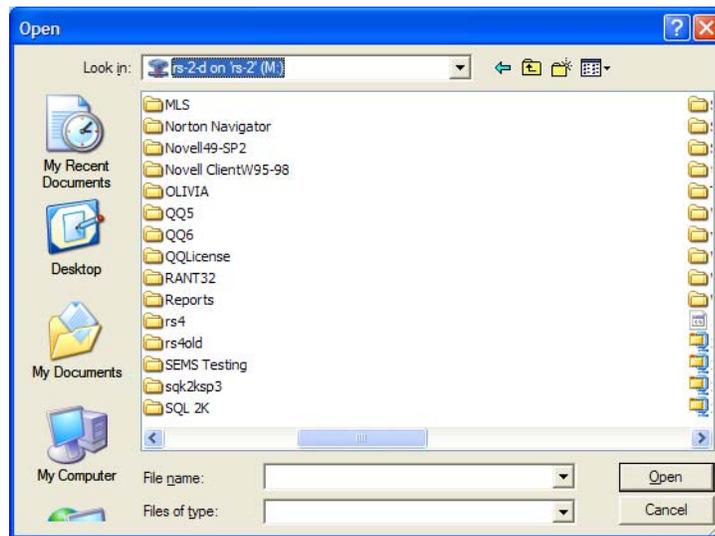
The student's demographic information appears in the Address window and makes the Portfolio button available.

**NOTE:** You can select a staff member by selecting staff from the Grades drop-down list, located at the top of the Address window.

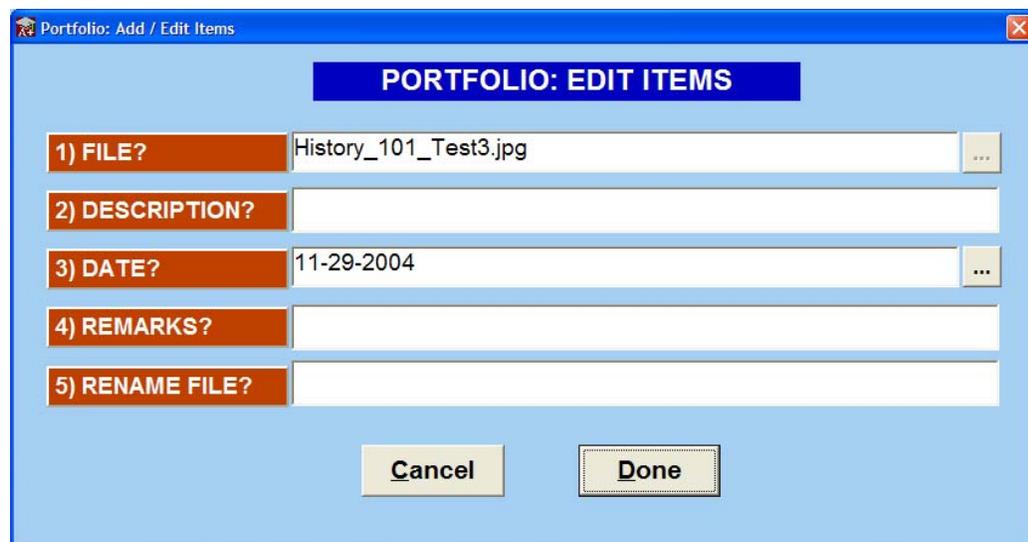
- 4 Click Portfolio.



A window appears, allowing you to browse for and select the file to add to the portfolio.



- b Browse for and select the file to add to the portfolio, and then click Open. The *Add/Edit Items* window appears, displaying the selected file and the current date.



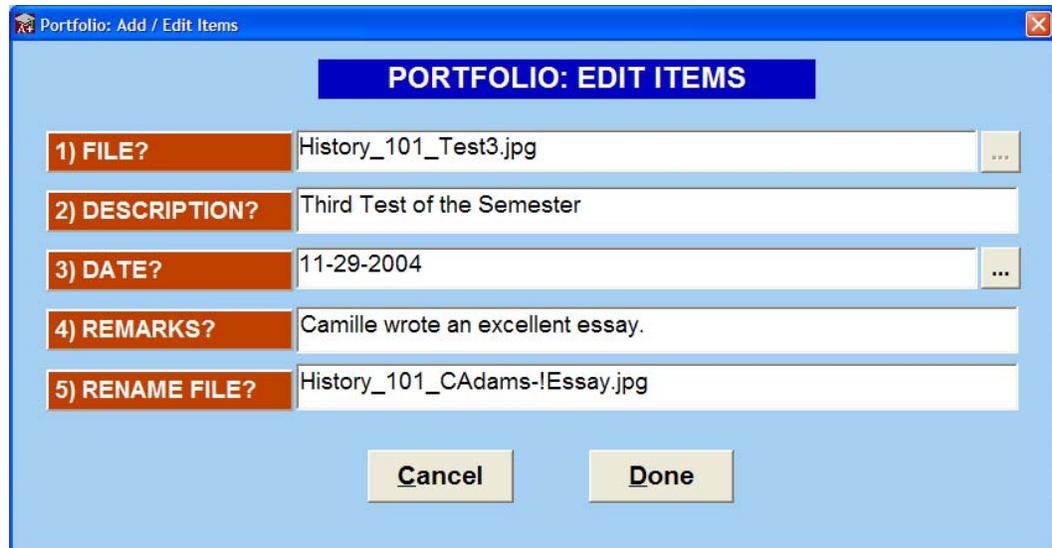
- c In the Description field, enter a short description of the file itself.
- d In the Remarks field, enter comments about the file's source document, such as why this file would demonstrate a student's best work.
- e Optionally, in the Rename File field, enter a new name for the selected file in the File field.

**NOTE:** *The Rename File field only renames the copy of the original file that is copied to the RS4 folder, **not** the original. When you add a file to portfolio, a copy of that file is added to the portfolio under the RS4 folder.*

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### *Deleting a File from a Portfolio*

A completed window might appear as follows. In this example, the file is described as being the third test of the semester, and the Remarks field notes that it contains an excellent essay. The file has also been renamed using this particular administrator's naming convention, naming the class, the student name, and its outstanding feature.



The screenshot shows a window titled "Portfolio: Add / Edit Items" with a blue border and a close button in the top right corner. The main content area has a light blue background and a dark blue header bar that says "PORTFOLIO: EDIT ITEMS". Below the header, there are five rows of input fields, each with a label on the left and a text box on the right. The labels are "1) FILE?", "2) DESCRIPTION?", "3) DATE?", "4) REMARKS?", and "5) RENAME FILE?". The text boxes contain the following values: "History\_101\_Test3.jpg", "Third Test of the Semester", "11-29-2004", "Camille wrote an excellent essay.", and "History\_101\_CAdams-!Essay.jpg". At the bottom of the window, there are two buttons: "Cancel" and "Done".

- f Click Done to confirm and exit the *Add/Edit Items* window.

The *Portfolio* window re-appears.

**NOTE:** *To view any file, double-click it in the Portfolio window. You can also select it in the Portfolio window, and then click Open.*

## Deleting a File from a Portfolio

To delete a file from a portfolio, select it in the *Portfolio* window, and then click Delete. You can also right-click the selected file and then select Delete.

## Editing Portfolio Files

After adding a file to your portfolio, you can change any feature found in the *Add/Edit Items* window, except the original source file. You can delete the file and add a new one. Simply right-click the file you want to remove, and then click Delete.

### To Edit a Portfolio File:

- 1 In the Portfolio window, click Edit. You can also right-click and select Edit. The *Add/Edit Items* window appears, similar to the following:

Portfolio: Add / Edit Items

**PORTFOLIO: EDIT ITEMS**

1) FILE?	History_101_Test3.jpg
2) DESCRIPTION?	Third Test of the Semester
3) DATE?	11-29-2004
4) REMARKS?	Camille wrote an excellent essay.
5) RENAME FILE?	History_101_CAdams-!Essay.jpg

Cancel Done

- 2 Change the fields as desired, and then click Done to save your changes.
  - To change the Description, Remarks, or Rename File fields, highlight the field and enter new text.
  - To change the date, click the browse button to display a calendar, and then select the new date.

**NOTE:** *The Rename File field only renames the copy of the original file that is copied to the RS4 folder, **not** the original. When you add a file to portfolio, a copy of that file is added to the portfolio under the RS4 folder.*

### Scanning Documents Into Portfolios

The Portfolio feature allows you to browse to and add any file into a portfolio. You can also add any document to a portfolio as you scan it. If you have Administrator's Plus installed on a system that can connect to a scanner, you can scan and add a document directly to an open portfolio.

#### To Scan Documents Into Portfolios:

- 1 In the *Portfolio* window, click Scanner. You can also right-click anywhere on the Portfolio window and then select Scanner.

The *Insert From Scanner* window appears.



- 2 From the Device drop-down list, select the scanner that you want to use.

**NOTE:** This list will contain any scanner attached to your system.

- 3 Choose one of the following:
  - If you select *Insert using scanner user interface*, the scanner's user interface appears, allowing you to use its scanning options, such as naming the file before you insert it into the portfolio.
  - If you do not select *Insert using scanner user interface*, the document will automatically be scanned and inserted into the portfolio. The file will initially be named *Image<#>.jpg*, which you can rename. See "Editing Portfolio Files" on page 1-9 to learn how to rename your file.
- 4 Click Insert to add the scan to the portfolio.

## Adding PDFs from the Report Writer to Portfolios

You can also add any document created in any module's Report Writer to student portfolios as a PDF file. For example, you can add report cards, discipline letters, transcripts, and more without worrying about having to regenerate these files, all in one easy step. There are two ways to add PDFs from any module's Report Writer:

- Using the Convert to PDF button
- Using the E-Mail button

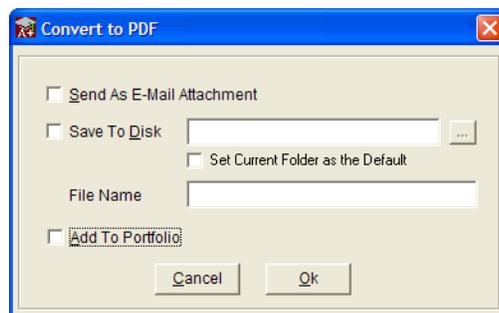
### Using the Convert to PDF Option

Every module's Report Writer allows you to convert any document it produces into a PDF. The *Convert to PDF* menu gives you the option of sending a copy of the document to student folios at the same time you convert your document to a PDF.

#### To Simultaneously Convert Documents PDFs and Send them to Portfolios:

- 1 Generate the report or letter you want in the appropriate module.  
The document then appears in the appropriate module's Report Viewer window.
- 2 Click the Convert to PDF button in the lower-right corner of the window.  
The *Convert to PDF* window appears.

Convert to PDF



- 3 In the File Name text box, enter a name for the file.
- 4 Select the Add to Portfolio checkbox.
- 5 Click Ok.

The report converts to a PDF file, and all students included in the report have a copy placed in their portfolio.

**NOTE:** *You may want to edit the name and remarks associated with the PDF file. See “Editing Portfolio Files” on page 1-9 to learn how to do this.*

### Using the E-Mail Option

Every module's Report Writer allows you to convert any document it produces to PDF. *If you have purchased the E-Mail module*, you can use the E-Mail Report Wizard to add these PDF reports to student portfolios.

Each module's report writer reports can be *e-mail enabled*. Once a report is e-mail enabled, you can save the e-mail *Type*, *Subject*, and *Recipients* so that each time you e-mail the same report, it will automatically be sent to the appropriate e-mail addresses.

You also have an option called *Add to Portfolio*. With this option, e-mailing the report also sends a PDF copy of the report to each student's corresponding portfolio.

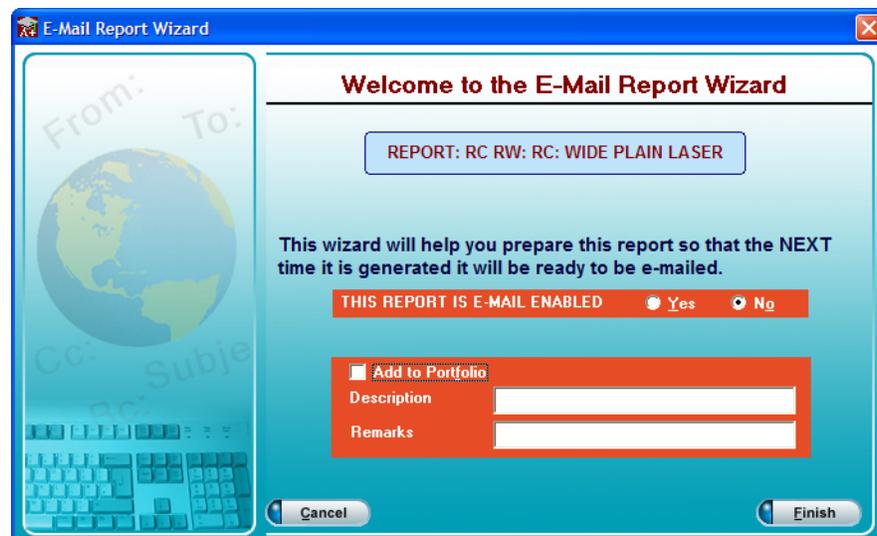


#### To Send Documents to Portfolios Using the E-Mail Option:

- 1 In the bottom right-hand corner of the *Report Viewer* window, click the E-Mail button.

- If you have not e-mailed this report card before, a prompt appears asking you if you want to enable the report for e-mail. Click Yes to display the *Welcome to the E-Mail Report Wizard* window.
- If the report is already e-mail-enabled, the e-mail window appears. Click the Report Wizard button to display the *Welcome to the E-Mail Report Wizard* window.

For example, if you have not e-mailed this report card before, the *Welcome to the E-Mail Report Wizard* window appears similar to the following:



- 2 Select the Add to Portfolio checkbox.
- 3 In the Description and Remarks fields, enter text that is generic enough to apply to all recipients.

**NOTE:** *This is all you have to check to add a report to portfolios.*

- 4 Set the remaining options as desired. See the E-Mail module's documentation to complete the E-Mail Wizard.