PlusPortals Manager
User Guide
Get Started Managing Your School's Portals

Integrated School Management Software
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PlusPortals Manager is an administrative interface that enables administrators to 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 demographics, class progress, disciplinary incidents, and class schedules.

**Who is this guide for?**

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

**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 [PlusPortals Teacher User Guide](#). Parents and students who want to learn how to use the portals should check out our [ParentPlus Interactive Guides and videos](#).
CHAPTER 1

Get Started

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1.1 Manage Accounts Tab

When you log in to PlusPortals Manager, the Manage Accounts page opens, displaying the Parents tab.

Upper Section of Manage Accounts Tab

A  Click a user group tab to see the accounts in that group. (See also "User Accounts" on page 16.)

B  Edit groups' ability to change or reset their passwords; view grading information and new year scheduling information; access E-portfolio, Class pages, and lesson plans; and log in to PlusPortals.

C  On the Parents tab only, click to filter users by grade level.

D  Search for a specific user by name.

E  Select an e-mail template. (See also "E-Mail Templates" on page 116.)

F  Refresh the information displayed on the tab.

G  Generate a list of user accounts. On the Parents and Students tabs, you can generate the list by grade level or course section.

H  Email or print account activation instructions. See "Send PlusPortals Login Credentials to Users" on page 11.

On the Admin tab only, you can add a new user by clicking Create New User.
Upper Section of Manage Accounts Tab

Lower Section of Manage Accounts Tab

I Select the check boxes for the users for whom you want to email or print account activation instructions.

J Displays the names of users with accounts.

K Displays user log-in IDs.

Note: On the Students and Teachers tab only, a column containing the user APIDs appears to the left of this column.

L Displays user account status (active or inactive).

M Displays the last date the user logged on. Click to view the user’s log-on history.

N On the Parents tab only, click to view information for their student.

O Click to reset the user’s password, or click to log on as the user. On the Admin tab only, click to delete a user, or click to edit the user’s profile settings, reset their password, and/or edit their administrative permissions.
1.2 Send PlusPortals Login Credentials to Users

You can send an e-mail with login credentials to a particular user or all users in a user group. The login credentials e-mail template can be customized, and we recommend you do so before sending users their login credentials.

**Note:** For more information on customizing the login credentials e-mail template, see "Customize PlusPortals E-Mail Templates" on page 117.

1. On the navigation bar, click **Manage Accounts**.
2. Click the user group you want to send login credentials to (Parents, Students, Teachers, or Admin).
3. Optional: Select the users you want to send credentials to.
4. In the **Select E-Mail Template** drop-down list, select the **Login Credentials** template.
5. Click the **E-Mail / Print Login Details** drop-down list, and select either **E-Mail Login Details** or **Print Login Details**.
6. In the **Select Criteria** dialog box, do one of the following, and then click **Next**:

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add all users from a user group to the recipient list. (available for all user groups)</td>
<td>Click All [users].</td>
</tr>
<tr>
<td>Add all students without e-mail addresses to the recipient list. (available for students when you click Print Login Details)</td>
<td>Click All students who do not have an e-mail address.</td>
</tr>
<tr>
<td>Add all students or parents from a selected grade level to the recipient list. (available for students or parents)</td>
<td>Click [Students/Parents] by grade level.</td>
</tr>
<tr>
<td>Add all students from the selected homeroom(s) to the recipient list. (available for students)</td>
<td>Click Students by homeroom.</td>
</tr>
<tr>
<td>Add selected members of a user group to the recipient list. (available for all user groups)</td>
<td>Click Specific [users].</td>
</tr>
<tr>
<td>Add users you selected in step 3 (if you selected any). (available for all user groups)</td>
<td>Click [Users] previously selected on the Manage Accounts screen.</td>
</tr>
</tbody>
</table>

7. In the **Select Recipients** dialog box, verify the selected users, and then click **Next**.

**Tip**: Using this dialog box, you can edit the recipient list after selecting users by criteria. Clear the **Show only non-activated accounts** check box at the top of the dialog box to view users with activated accounts.

8. In the **Login Details Preview** dialog box, verify the e-mail subject and body, and then click **Continue**.

**Note**: If you want to edit the e-mail subject and body, see "Customize PlusPortals E-Mail Templates" on page 117.

The log-in details are e-mailed, or, if you're printing them, they appear in the print-preview document viewer.
1.3 Activate FACTS Single Sign-On (SSO)

The PlusPortals Single Sign-On (SSO) feature provides a link from PlusPortals to FACTS so that you only need to log in to PlusPortals to access both.

To set up FACTS SSO, follow these steps:

1. On the navigation bar, click **Setup > Integrations**.
2. Under **Single Sign-On to FACTS**, select the **Enable Single Sign-On to FACTS** check box.
3. Type the **Institution Key**, **Hash Algorithm**, and **API Key**, and then click **Save**.

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

To activate the link to FACTS, follow these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Parents**.
3. Under **Master Menu Customization**, select the **FACTS SSO** check box.

4. At the bottom of the **Parents** tab, click **Save Settings**.
   Parents can now access the FACTS website through a link in PlusPortals.
The PlusPortals Single Sign-On (SSO) feature provides a link from Finalsite to PlusPortals so that you only need to log in to Finalsite to access both.

To set up Finalsite SSO, follow these steps:

1. On the navigation bar, click **Setup > Integrations**.
2. Under **Single Sign-On from Finalsite**, select the **Enable Single Sign-On from Finalsite** check box.
3. Type the shared key you use for Finalsite, and then click **Save**.
CHAPTER 2

Manage Accounts

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2.1 User Accounts

On the Manage Accounts page, you can click a user groups' tab to see the user accounts in that group.

Note: Student and parent user accounts are automatically synced to PlusPortals when you perform an All Data sync in AdminPlus via Tools > TeacherPlus Setup & Sync Manager > All Data (Since Year Start). By default, only students and parents from your current (active) year are synced. If you also want to sync students and parents from the scheduling year, see Sync Scheduling Year Students and Parents to the PlusPortals.

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

Student and Parent: Student user 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 either input the student's e-mail address or a user name (in case an e-mail address is not available for the student) in this field. Similarly, parent user accounts are determined by 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 main administrator account. You can create other administrator accounts via Manage Accounts > Admin. For more information, see "Create an Administrator Account" on page 17.

Note: Accounts that share the same login e-mail are automatically linked. The user can choose which role to log in as after entering their e-mail and password. As a result, a user with different roles (for example, teacher and parent) doesn't need two separate logins.
2.2 Create an Administrator Account

Although your master administrator login of "plusportaladmin" is the main administrator account, you can create accounts for other administrators.

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

1. On the navigation bar, click **Manage Accounts**.
2. Click **Admin**.
3. On the right side of the page, click **Create New User**.
4. Type the new user's information.
5. Select the permissions you want to give to the admin account being created.
6. Click **Create User**.

**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 to choose which role to log in as.
2.3 Manage Password Permissions

The "plusportaladmin" can allow user groups to change or reset their password. Additionally, the "plusportaladmin" can decide whether admin users can see users' temporary passwords.

To allow user groups to change or reset their password, follow these steps:

1. On the navigation bar, click **Manage Accounts**.
2. Click **Settings**.
3. Under **Password Management**, click **Yes** next to the user groups you want to allow to change or reset their password.

![Password Management](image)

The "plusportaladmin" can control the visibility of temporary passwords by following these steps:

**Warning:** Once you click **Yes** next to **Hide temporary passwords** and click **Save**, you cannot change this setting.

1. To hide temporary passwords from all admin users, including the "plusportaladmin," click **Yes** next to **Hide temporary password**.

**Note:** Admin users won't see temporary passwords on the **Manage Accounts** page. However, temporary passwords for students that have usernames instead of e-mail addresses remain visible.

2. To hide temporary passwords from all admin users, with the exception of the "plusportaladmin," do the following:
   1. Next to **Hide temporary password**, click **No**.
   2. Next to **Allow Admin users to see temporary passwords**, click **No**.
3. At the bottom of the **Settings** tab, click **Save**.
2.4 Lock User Groups Out of PlusPortals

You can prevent user groups from logging in to PlusPortals and customize a message that displays when they try to log in.

To lock user groups out of PlusPortals, follow these steps:

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Scroll down to Lock Accounts.

![Lock Accounts screenshot]

4. Next to Lock all [user] accounts, set the toggle to Yes.
5. Optional: In the text editor, type a message that appears when a restricted user tries to log in.
6. At the bottom of the Settings tab, click Save.
2.5 Edit Administrator Demographic Information

You can edit the demographic information for your PlusPortals administrator account, such as your name, address, and contact information, by following these steps:

1. On the page header, click Edit Profile.

2. Edit the demographic information, and then click Save.

Note: Only First Name and Last Name are required.
2.6 Reset User Passwords

Follow these steps to reset a user’s password:

1. On the navigation bar, click Manage Accounts.

2. Click the appropriate group tab (Parents, Students, Teachers, or Admin).

3. Next to the user’s name, click 📩.

   A message confirms the password has been reset.

4. Click OK.

   An email notification is automatically sent using the email template selected for resetting passwords. See "E-Mail Templates" on page 116.

Tip: You can also reset an administrator’s password by clicking 📩 next to the user’s name on the Admin tab and clicking Reset Password.
2.7 Log on as a Parent, Student, or Teacher

Follow these steps to log on as a parent, student, or teacher:

1. On the navigation bar, click **Manage Accounts**.

2. Click the appropriate group tab (**Parents**, **Students**, or **Teachers**).

3. Next to the user’s name, click 🔄.
Follow these steps to delete an administrator's account:

1. On the navigation bar, click **Manage Accounts**.
2. Click **Admin**.
3. Next to the administrator's name, click 📋.
4. Click **Yes** to confirm the deletion.
   - A message confirms the administrator has been deleted.
5. Click **OK**.
CHAPTER 3

Customize Appearance

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3.1 Customize the Login Page

You can choose a custom banner and color scheme to customize the appearance of the Login page, the first PlusPortals page your users see. If you want more information to appear on the page where users log in, see "Customize the PlusPortals Home Page" on page 26.

To customize the Login page, click **Miscellaneous > Appearance > Login Page**.

For an overview of how you can customize the login page, see the diagram and table below:

![Diagram of Login Page Customization](image)

### Overview of Login Page Customization

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| A    | Choose an image to display as the banner on the Login page.  
  **Note:** We recommend using an image that is 1200 x 100 pixels. |
| B    | Change the background color to a predefined theme. |
| C    | Change the background color and text color on the Login page. In the **Background Color** drop-down, you can type your school’s hex code to display your school’s exact color. |
| D    | Save your changes. |
3.2 Customize the PlusPortals Home Page

The Home page is an enhanced version of the Login page. If you choose to use the Home page instead of the Login page, you can display an image, messages, news, events, and school resources on the page where users log in.

To customize the appearance of your PlusPortals Home Page, follow these steps:

1. On the navigation bar, click **Miscellaneous > Appearance > PlusPortals Home Page**.

2. Select the **Use PlusPortals Home Page instead of Login Page** check box to replace the login box with the features you select for the Home page.

3. Refer to the following image for the ways you can customize the Home page.
4. Click **Apply Changes** when you're done.
Tip: You can show news, resources, a link to the TeacherLists Classroom Supplies Lists page, and events on the Home page. When you’re creating or editing an announcement, a calendar event, or a link/file, select the Show on Login Page (Public) check box. You must also select the appropriate content check box via Miscellaneous > Appearance > PlusPortals Home Page.
3.3 Customize the PlusPortals Pages

You can control the appearance of all portal pages by selecting a school banner and color scheme that match your school's branding, or by selecting a predefined theme.

To customize the appearance of the PlusPortals pages, click *Miscellaneous > Appearance > PlusPortals Pages.*

Refer to the image below when customizing the portal pages, and then click *Apply Theme.*
3.4 Customize the Logout Page

You can send users to any site upon logging out of PlusPortals, such as your school’s website. With this feature, parents, students, and teachers can be directed to useful information on your school website, such as school news or alerts.

To customize your PlusPortals logout page, follow these steps:

1. On the navigation bar, click **Setup > General Settings**.
2. Next to **URL**, type the URL of the site you want to redirect users to.
3. Click **Save**.
3.5 Manage Portfolio Categories

After syncing portfolio items with PlusPortals in AdminPlus, you can choose which portfolio categories to display or hide. For more information on syncing portfolio items with PlusPortals in AdminPlus, see the topic Sync Portfolio Documents with PlusPortals in the AdminPlus Data Base guide.

To manage portfolio categories, follow these steps:

1. On the navigation bar, click Setup > Portfolio Categories.
2. Select the check boxes next to the desired categories.
3. Optional: In the Portal Display Name column, edit how the category name appears in the portals.
4. Select the Show portfolio documents not belonging to any of the above categories check box beneath the table to show any documents in categories other than the ones listed.
5. Click Save.
### Summary Permissions

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4.1 Customize User Home Pages

You can determine the panels that parents, students, and teachers see on their portal Home pages by following these steps:

1. On the navigation bar, click **Permissions**.
   The **Summary** tab opens.

2. Under **Home Page Permissions**, select the options you want to display on the parent portal and student portal Home pages.

3. Select the options you want to display on the teacher portal Home page.

4. Select to show **Daily Attendance** or **Period Attendance** on the parent portal Home page.
   Parents can see their child's attendance on the Attendance tab.

5. At the bottom of the **Summary** tab, click **Save Settings**.
4.2 Set Default Directory Display Settings

You can choose whether or not parents and students appear in the directory by default. You can also choose whether to show non-teaching staff members in the directory.

**Note:**
To customize what parents, students, and teachers see in their directories, refer to the following topics:
- "Customize Parents' and Students' Directory Permissions" on page 72
- "Customize Teachers' Directory Permissions" on page 59

To set default directory display settings, follow these steps:

1. On the navigation bar, click **Permissions**. The **Summary** tab opens.
2. Scroll down to **Directory**.
3. Click one of the following:
   - **Opt-in**: Show all parents and students in the directory by default. To hide their information, parents and students must opt out on their portal's Directory Listing page.
   - **Opt-out**: Hide all parents and students from the directory by default. To show their information, parents and students must opt in on their portal's Directory Listing page.
4. To show non-teaching staff members in the directory, click **Yes**.
5. At the bottom of the **Summary** tab, click **Save Settings**.

![Directory settings](image)
4.3 Set Quarter Ending Dates

Students’ courses appear in the portals based on the quarter ending dates you set. You can choose to display courses from the current quarter only or from both the current and previous quarters. You can also display period attendance from selected quarters.

To set quarter ending dates, follow these steps:

1. On the navigation bar, click **Permissions**. The Summary tab opens.
2. Scroll down to **Quarter Ending Dates**.
3. Type the quarter ending dates, or click \( \square \) and select the dates.
4. Next to **Show Which Courses**, click either **From Current Quarter** or **From Current and Previous Quarters**.
5. Select the quarters you want to display period attendance for.
6. At the bottom of the Summary tab, click **Save Settings**.
4.4 Customize Attendance Codes

You can change how attendance codes and their descriptions display for parents and students in PlusPortals by following these steps:

**Important:** These settings do not change how attendance codes appear in AdminPlus.

1. On the navigation bar, click **Permissions**. The **Summary** tab opens.
2. Scroll down to **Period Attendance Legend**.
3. Next to the code you want to customize, click **Edit**.
4. In the **Visible** column, select the check box to make the code visible.
5. In the **Display Code As** column, type the code as you want it to appear.
6. In the **Display Description As** column, type a description for the code.
7. Click **Update** to save your changes, or click **Cancel** to undo them.
4.5 Make Schedule Rotations Visible

You can decide which, if any, schedule rotations you show to parents, students, and teachers by following these steps:

**Note:** Schedule rotations are configured in AdminPlus.

1. On the navigation bar, click Permissions. The Summary tab opens.

2. Scroll down to Student/Teacher Schedule.

3. Select Show rotations to Parents, Students and Teachers to make schedule rotations visible.

4. Select the rotations you want parents, students, and teachers to see.

5. At the bottom of the Summary tab, click Save Settings.

**Tip:** Click Edit to change the rotation's display name.
4.6 Edit Schedule Rotation Names

To edit schedule rotation names, follow these steps:

1. On the navigation bar, click Permissions. The Summary tab opens.
2. Scroll down to Student/Teacher Schedule.
3. Select Show rotations to Parents, Students and Teachers to make schedule rotations visible.
4. Next to a rotation, click Edit.
5. Edit the rotation name.
6. Click Update to save your changes, or click Cancel to undo them.
4.7 Customize Report Cards

You can choose which report card columns parents and students see; show or hide grades, narratives, skills, honor roll, and class rank; and determine your GPA display settings.

1. On the navigation bar, click **Permissions**.
   The **Summary** tab opens.

2. Scroll down to **Report Card Settings for Parents and Students**.
3. Refer to the following diagram and table to customize your report cards.

Report Card Settings for Parents and Students

Report Card Settings Overview

A  Select the report card columns whose grades you want to show.

B  Select this check box if you want to use the number grade print table from AdminPlus. For more information, click ?.

C  Select the grade levels whose grades you want to show.

D  Show skills and/or narratives on your report cards. If you show narratives, select which narratives you want to show.

E  Show honor roll and/or class rank on your report cards.

F  Select your preferred GPA settings.

4. At the bottom of the Summary tab, click Save Settings.
4.8 Choose Which TeacherPlus Gradebook Content is Visible to Students and Parents

You can choose which information from TeacherPlus Gradebook (such as grades, averages, skills, category averages, narratives, and scores) to show students and parents.

1. On the navigation bar, click **Permissions**.
   The **Summary** tab opens.

2. Scroll down to **Progress Box, Scores and Progress Reports settings for Parents and Students**.
3. Refer to the following diagram and table to customize your settings.

![Diagram of Progress Box, Scores, and Progress Reports settings for Parents and Students]

### Overview of Progress Box, Scores, and Progress Reports Settings

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Show scores/skills for the selected report card columns.</td>
</tr>
<tr>
<td>B</td>
<td>Show scores for the selected grade levels.</td>
</tr>
<tr>
<td>C</td>
<td>Show averages and/or grades for the selected grade levels.</td>
</tr>
<tr>
<td>D</td>
<td>Show progress reports on the Progress Reports tab in parent and student portals. &lt;br&gt;<strong>Note:</strong> Progress reports only show if a teacher generates the report in TeacherPlus Gradebook and then posts it to PlusPortals.</td>
</tr>
<tr>
<td>E</td>
<td>Show narratives on the Performance tab in parent and student portals.</td>
</tr>
<tr>
<td>F</td>
<td>Select which columns to show in the Scores box, located on the Performance tab in parent and student portals.</td>
</tr>
<tr>
<td>G</td>
<td>Show category averages on the Performance tab in parent and student portals.</td>
</tr>
</tbody>
</table>

4. At the bottom of the **Summary** tab, click **Save Settings**.
You can select the skills information that displays in parent and student portals. Skills are the learning goals assigned to a class.

1. On the navigation bar, click **Permissions**.

   The **Summary** tab opens.

2. Scroll down to **Skills View for Parents and Students (Performance tab)**.

3. Select one or both of the following:

   - **Show Summary View**: Summary View displays a skill description and a grade.
   - **Show Detailed View**: Detailed View displays a skill description and any columns you select under **Show which columns in Detailed View**.

   **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 Score Column section of the **Add a Score Column** topic.

4. At the bottom of the **Summary** tab, click **Save Settings**.
4.10 Customize the Standards Live Report

Customize the information displayed to parents and students in the Standards Live Report, located on the Progress Reports tab.

**Note:** Standards Live Report only appears on the Progress Reports tab if Standards are assigned to a course in the TeacherPlus Management Site.

1. On the navigation bar, click **Permissions**. The **Summary** tab opens.

2. Scroll down to **Show Standards Live Report (Progress Reports tab)**.

3. Select the columns you want to include in the Standards Live Report.

   ![Show which columns in Standards Live Report?](image)

   - Assessment
   - Description
   - Category
   - Date

4. At the bottom of the **Summary** tab, click **Save Settings**.
4.11 Set the Earliest Date to View Disciplinary Incidents

You can show students’ disciplinary incidents on or after a set date by following these steps:

1. On the navigation bar, click **Permissions**. The **Summary** tab opens.

2. Scroll down to **Incidents**.

   ![Incidents](image)

3. Type the date, or click \[ and then click the date.

   **Tip:** To ensure that all incidents submitted during the school year remain visible, set this date to coincide with the first day of your school year.

4. At the bottom of the **Summary** tab, click **Save Settings**.
You can choose which user groups see section meeting times by following these steps:

1. On the navigation bar, click Permissions. The Summary tab opens.

2. Scroll down to Section Meeting Time.

3. Select the appropriate check boxes.

4. At the bottom of the Summary tab, click Save Settings.

The section meeting times display in the Class drop-down lists in the selected portals.
4.13 Set How Homework Displays

You can choose the order homework is displayed by following these steps:

1. On the navigation bar, click Permissions. The Summary tab opens.
2. Scroll down to Homework, and then click one of the following:

   - **Show current month's homework on top:** Display homework for the current month at the top, and sort the homework by due date.
   - **Show homework by sorting on due date (descending order):** Sort by due date, displaying the newest homework at the top of the list. Past due homework is relocated to the bottom of the list.
   - **Show homework by sorting on due date descending with currently day due at top:** Sort by due date with the current day's homework displayed at the top, followed by the most recent past due homework.
3. At the bottom of the Summary tab, click Save Settings.
4.14 Show Withdrawn Courses to Parents and Students

You can show withdrawn courses to parents and students (if there are grades or scores for the course) by following these steps:

1. On the navigation bar, click Permissions.
   The Summary tab opens.

2. Scroll down to Section Visibility.

3. Select Show withdrawn courses to parents and students if there are grades or scores.

4. At the bottom of the Summary tab, click Save Settings.
4.15 Display Course Descriptions Instead of Course Names

You can display course descriptions instead of course names by following these steps:

1. On the navigation bar, click Permissions.
   The Summary tab opens.

2. Scroll down to Section Visibility.

3. Select Display Course Descriptions instead of Course Names.

4. At the bottom of the Summary tab, click Save Settings.
4.16 Allow Parents and Students to Access OneDrive School

You can give parents and students access to OneDrive School by following these steps:

1. On the navigation bar, click Permissions. The Summary tab opens.

2. Scroll down to Microsoft OneDrive School (Business) Accessibility Settings in E-Locker.

3. Select the Allow parents and students to sign in to OneDrive using their work or school account to attach files to homework check box.

4. At the bottom of the Summary tab, click Save Settings.

Note: If a parent or student wants to access OneDrive School to attach files, they can do so in their portal by clicking E-Locker and then Upload in the Homework Hand-In tab.
4.17 Show or Hide Avatars in Class Discussions

You can display student and teacher avatars next to their names in class discussions, or you can hide them.

1. On the navigation bar, click Permissions.
   The Summary tab opens.
2. Scroll down to Discussions.
3. To display the avatar, select the Show Avatar check box. To hide the avatar, clear the check box.
4. Click Save Settings.

Tip: You can also show or hide avatars in discussions by clicking Manage Accounts, clicking Settings, and scrolling down to Discussions. To show avatars, set the corresponding toggle to Yes. To hide avatars, set the corresponding toggle to No.
CHAPTER 5

Admin Permissions

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5.1 Give Admin Users Access to E-Mail Analytics

Using E-Mail Analytics, 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, determine the reason they weren't delivered, and fix these issues to maintain an accurate mailing list.

**Note:** The master login of "plusportaladmin" is the only account with default access to E-Mail Analytics. Use this account to authorize other admin users.

To give an admin user access to E-Mail Analytics, follow these steps:

1. On the navigation bar, click **Manage Accounts**.
2. Click **Admin**.
3. Click **Admin** next to the admin user you want to give permission to access **E-Mail Analytics**.
4. On the **Update User** page, under **Miscellaneous**, select the **E-Mail Analytics** check box.
5. Click **Update User**.
5.2 Give Admin Users Access to the Unit Builder

You can give admin users access to the Unit Builder, allowing them to create units, assign classes to a unit, set a unit’s start and end dates, and add teacher resources to a unit.

To give admin users access to the Unit Builder, follow these steps:

1. On the navigation bar, click **Manage Accounts**.
2. Click **Admin**.
3. Next to the admin user, click 📋.
4. On the **Update User** page, under **Setup**, select the **Unit Builder** check box.
5. Click **Update User**.
5.3 Manage Password Permissions

The "plusportaladmin" can allow user groups to change or reset their password. Additionally, the "plusportaladmin" can decide whether admin users can see users' temporary passwords.

To allow user groups to change or reset their password, follow these steps:

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Under Password Management, click Yes next to the user groups you want to allow to change or reset their password.

The "plusportaladmin" can control the visibility of temporary passwords by following these steps:

**Warning:** Once you click Yes next to Hide temporary passwords and click Save, you cannot change this setting.

1. To hide temporary passwords from all admin users, including the "plusportaladmin," click Yes next to Hide temporary password.

   **Note:** Admin users won't see temporary passwords on the Manage Accounts page. However, temporary passwords for students that have usernames instead of e-mail addresses remain visible.

2. To hide temporary passwords from all admin users, with the exception of the "plusportaladmin," do the following:
   1. Next to Hide temporary password, click No.
   2. Next to Allow Admin users to see temporary passwords, click No.
3. At the bottom of the Settings tab, click Save.
CHAPTER 6

Teacher Permissions

6.1 Customize Navigation Menus for Teaching and Non-Teaching Staff Portals .................................. 57
6.2 Customize Teachers’ Directory Permissions .................................................................................. 59
6.3 Allow Teachers to Post Discussions ............................................................................................. 60
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6.5 Customize the Students Tab in Teacher Portals .......................................................................... 62
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6.12 Manage Password Permissions .................................................................................................. 69
6.1 Customize Navigation Menus for Teaching and Non-Teaching Staff Portals

You can select which Master menu options display on teaching and non-teaching staff portals and which Section menu options display on teaching staff portals (Figure 1).

Figure 1: Teacher Portal Navigation Menus

1. On the navigation bar, click Permissions.
2. Click Teachers.
3. Under Master Menu Customization (Figure 2), customize the navigation menus. For more information, see the following diagram and table.
**Figure 2: Master Menu Customization**

<table>
<thead>
<tr>
<th></th>
<th>Overview of Master and Section Menu Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>For teaching staff portals, select the options you want to display on the Master menu.</td>
</tr>
<tr>
<td>B</td>
<td>For non-teaching staff portals, select the options you want to display on the Master menu.</td>
</tr>
<tr>
<td>C</td>
<td>For teaching staff portals, select the options you want to display on the Section menu.</td>
</tr>
<tr>
<td>D</td>
<td>Set your preferences for showing the HTML5 Gradebook link and/or Silverlight Gradebook link.</td>
</tr>
</tbody>
</table>

4. At the bottom of the **Teachers** tab, click **Save Settings**.
6.2 Customize Teachers' Directory Permissions

You can give teachers permission to see parent, teacher, and student directories. You can also select which demographics are visible to teachers in each directory.

**Important:** The demographics displayed in the PlusPortals directories depend on the Directory Opt-In/Opt-out setting (“Set Default Directory Display Settings” on page 34) and the demographic information parents and students choose to share.

To customize teachers' directory permissions, follow these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Teachers**.
3. Scroll down to **Directory**.
4. See the diagram and table below to customize directory settings.
5. At the bottom of the **Teachers** tab, click **Save Settings**.

---

**Directory Customization Overview**

**A**
- Select the **Show [User] Directory** check box for the user directories you want to make visible to teachers.

**B**
- Optional: Under **Heading**, type a descriptor for the demographic field you selected.
- Click **Select**, select the demographic field you want teachers to see, and then click **Ok**.

**C**
- **Note:** You can select more than one demographic field per **Fields** box.

**Important:** Remember to click **Save Settings** at the bottom of the **Teachers** tab to save your changes.
6.3 Allow Teachers to Post Discussions

You can choose to activate or deactivate the Discussions feature in teacher portals by following these steps:

1. On the navigation bar, click Permissions.
2. Click Teachers.
3. Scroll down to Discussions.
4. To activate the Discussions feature, select the Active for teachers check box. To deactivate the feature, clear the Active for teachers check box.

5. Click Save Settings.

Tip: You can also activate or deactivate the Discussions feature by clicking Manage Accounts, clicking Settings, and scrolling down to Discussions. To activate discussions, set the corresponding toggle to Yes. To deactivate discussions, set the corresponding toggle to No.
6.4 Choose Which Student Demographics Are Visible to Teachers

You can select which student demographics are visible to teachers by following these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Teachers**.
3. Scroll down to **Demographics**, and then select the demographics you want to make visible to teachers.
4. At the bottom of the **Teachers** tab, click **Save Settings**.

![Demographics Image]
6.5 Customize the Students Tab in Teacher Portals

You can choose which student panels appear on the Students tab in teacher portals by following these steps:

1. On the navigation bar, click **Permissions**.

2. Click **Teachers**.

3. Scroll down to **Students Tab** (Figure 1), and then select the student panels you want to display in teacher portals (Figure 2).

4. At the bottom of the **Teachers** tab, click **Save Settings**.

---

**Figure 1**: Students Tab in PlusPortals Management Site

**Figure 2**: Student Tab Panels in Teacher Portals
6.6 Allow Teachers to Show/Hide Courses and Edit Course Display Names

You can give teachers the ability to show or hide their courses from parents and students and edit their course display names by following these steps:

1. On the navigation bar, click Permissions. The Summary tab opens.
2. Scroll down to Section Visibility.
3. Select the Allow teachers to select parent/student visibility and change display name for their courses check box.
   
   **Note:** Changing the display name does not change the core course name. The edits only change how the name is displayed in parent and student portals.

4. At the bottom of the Summary tab, click Save Settings.
6.7 Give Teachers Access to Students' Exam, Semester, and Final Averages

You can make students' exam averages, semester averages, and final averages visible on the Scores tab in teacher portals by following these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Teachers**.
3. Scroll down to **Scores Tab**, and then select **Show Exams, Semester and Final Averages**.
4. At the bottom of the **Teachers** tab, click **Save Settings**.
6.8 Give Teachers Permission to View And/Or Add Incidents

You can allow teachers to view all students’ disciplinary incidents or just the incidents submitted by that teacher. You can also enable teachers to submit incidents from PlusPortals. The incidents are sent to the AdminPlus Discipline Holding Bin, where they are reviewed, and, if approved, become part of the students' permanent records.

To give teachers permission to view and/or add incidents, follow these steps:

1. On the navigation bar, click Permissions.
2. Click Teachers.
3. Scroll down to Incidents, and then set teacher permissions for viewing and adding incidents.

4. At the bottom of the Teachers tab, click Save Settings.
6.9 Allow Teachers to Create Event Categories

Using event categories, teachers can organize the events they post to their class calendars. To enable event category permissions for teachers, follow these steps:

**Important:** Because it’s possible to create multiple categories for the same type of event (for example, “Homework”, “homework”, or “Coursework”), we recommend limiting the ability to create event categories to the PlusPortals administrator. See “Create, Edit, and Delete Event Categories” on page 94.

1. On the navigation bar, click **Permissions**.
2. Click **Teachers**.
3. Scroll down to **Calendar**, and then select **Allow Teachers to create Event categories**.
4. At the bottom of the **Teachers** tab, click **Save Settings**.
6.10 Set Teacher Permissions for the Unit Builder

You can allow teachers to edit the contents of a unit, create their own unit, and add links or files to a unit.

**Note:** 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 in one location automatically updates the other. Teachers can only edit the content of a unit if an admin user with Unit Builder access gives them permission.

To set teacher permissions for the Unit Builder, follow these steps:

1. On the navigation bar, click **Setup > Unit Builder**.
2. Click **Settings**.
3. Do any of the following:

   - To enable teachers to edit the Unit Name, select the **Allow teachers to edit the content of Units created by administrators** check box.

     **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. When a teacher edits a unit with more than one assigned class, the Unit Builder duplicates the unit so the other classes are not affected. An information icon indicates that the new unit was “Edited by [Last Name], [First Name].”

   - To enable teachers to create new units in their Lesson Planner, select the **Allow teachers to create Units** check box.

     **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].”

   - To enable teachers to add their own files and links to Teacher Resources, select the **Allow teachers to add files and links to Teacher Resources** check box.

     **Note:** Teachers cannot edit or delete files that an administrator has added to Teacher Resources.

4. Click **Save**.
6.11 Allow Teachers to Send E-Mail Notifications

Follow these steps to allow teachers to send e-mail notifications to parents and students when posting new content to their class pages.

1. On the navigation bar, click **Permissions**.
2. Click **Teachers**.
3. Scroll down to **E-Mail Notification**.
4. Next to **Allow Teachers to send e-mail notifications**, click **Yes** or **No**.
5. Click **Save Settings**.
6.12 Manage Password Permissions

The "plusportaladmin" can allow user groups to change or reset their password. Additionally, the "plusportaladmin" can decide whether admin users can see users' temporary passwords.

To allow user groups to change or reset their password, follow these steps:

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Under Password Management, click Yes next to the user groups you want to allow to change or reset their password.

The "plusportaladmin" can control the visibility of temporary passwords by following these steps:

**Warning:** Once you click Yes next to Hide temporary passwords and click Save, you cannot change this setting.

1. To hide temporary passwords from all admin users, including the "plusportaladmin," click Yes next to Hide temporary password.

**Note:** Admin users won't see temporary passwords on the Manage Accounts page. However, temporary passwords for students that have usernames instead of e-mail addresses remain visible.

2. To hide temporary passwords from all admin users, with the exception of the "plusportaladmin," do the following:
   1. Next to Hide temporary password, click No.
   2. Next to Allow Admin users to see temporary passwords, click No.
3. At the bottom of the Settings tab, click Save.
CHAPTER 7

Parent and Student Permissions

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7.1 Customize Navigation Menus in Parent and Student Portals

You can customize what appears on the Master and Section menus in parent and student portals by following the steps below:

1. On the navigation bar, click **Permissions**.
2. Click **Parents** or **Students**.
3. Under **Master Menu Customization**, select the options you want to display on the Master menu and Section menu.
4. At the bottom of the tab, click **Save Settings**.
7.2 Customize Parents' and Students' Directory Permissions

You can give parents and students permission to see parent, teacher, and student directories. You can also select which demographics are visible to parents and students in each directory.

To customize parents' and students' directory permissions, follow these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Parents** or **Students**.
3. Scroll down to **Directory**.
4. Refer to the diagram and table below for steps on customizing directory settings.

### Directory Customization Overview

A. Select the **Show [User] Directory** check box for the user directories you want to make visible to parents or students.

B. Optional: Under **Heading**, type a descriptor for the demographic fields you selected.

   Click **Select**, select the demographic field you want parents or students to see, and then click **Ok**.

C. **Note**: You can select more than one demographic field per **Fields** box.

5. At the bottom of the tab, click **Save Settings**.
7.3 Allow Parents and Students Access to Discussions

You can choose to activate or deactivate the Discussions feature in parent and/or student portals by following these steps:

1. On the navigation bar, click Permissions.
2. Click Parents or Students.
3. Scroll down to Discussions.
4. To activate the Discussions feature, select the Active for [parents/students] check box. To deactivate the feature, clear the Active for [parents/students] check box.
5. At the bottom of the tab, click Save Settings.

Tip: You can also activate or deactivate the Discussions feature by clicking Manage Accounts, clicking Settings, and scrolling down to Discussions. To activate discussions, set the corresponding toggle to Yes. To deactivate discussions, set the corresponding toggle to No.
7.4 Choose Which Attendance to Show in Parent and Student Portals

You can choose to show period and/or daily attendance in parent and student portals by following these steps:

1. On the navigation bar, click Permissions.
2. Click Parents or Students.
3. Scroll down to Attendance.
4. Select Show Period Attendance and/or Show Daily Attendance.
5. At the bottom of the tab, click Save Settings.
7.5 Customize Parents' Demographic Permissions

You can allow parents to view and/or edit student demographics from their portal. Any demographic information edited by parents is sent to the PlusPortals Holding Bin in AdminPlus for review before changes are made to students' records.

To customize parents' demographic permissions, follow these steps:

1. On the navigation bar, click Permissions.
2. Click Parents.
3. Scroll down to Demographics.
4. Refer to the diagram and table below when making your selections.
5. At the bottom of the Parents tab, click Save Settings.

Overview of Parent Demographic Permissions

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A</strong></td>
<td>Allow parents to edit their student's demographic data. The <strong>Edit</strong> column appears in the Demographics list.</td>
</tr>
<tr>
<td><strong>B</strong></td>
<td>Select whether parents can view and/or edit each student demographic.</td>
</tr>
<tr>
<td><strong>C</strong></td>
<td>Allow parents to edit their demographic data. The <strong>Edit</strong> column appears in the Demographics list.</td>
</tr>
<tr>
<td><strong>D</strong></td>
<td>Select whether parents can view and/or edit each of their demographics.</td>
</tr>
</tbody>
</table>
7.6 Customize Students' Demographic Permissions

You can enable students to view and/or edit their demographics from their portal. Any demographic information edited by students is sent to the PlusPortals Holding Bin in AdminPlus for review before changes are made to students’ records.

To customize students’ demographic permissions, follow these steps:

1. On the navigation bar, click **Permissions**.
2. Click **Students**.
3. Scroll down to **Demographics**.
4. To allow students to edit their demographics, select the **Allow students to edit demographic data** check box.
5. Select whether students can view and/or edit each demographic.
6. At the bottom of the **Students** tab, click **Save Settings**.
7.7 Hide Grading Information from Parents and Students

You can add parents and students to the restriction list to block their access to all grading information in PlusPortals. In the text editor, you can create a message that displays in the following restricted areas.

- Progress box
- Recent Scores box
- Performance tab
- Progress Reports tab
- Report Card tab
- Quizzes section of E-Locker

**Note:** These restricted areas also display when you hover over 🔄.

To add parents to the restricted list, follow these steps:

1. On the navigation bar, click **Manage Accounts**.
2. Click **Settings**.
3. Scroll down to **Restriction List**.
4. Refer to the diagram and table below for the remaining steps.
### Restriction List Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Add parents and/or students to the restriction list.</td>
</tr>
<tr>
<td>6</td>
<td>Select all the text in the editor. You can then delete the text and replace it with a new message.</td>
</tr>
<tr>
<td>7</td>
<td>Type a message for restricted users to see in place of restricted information.</td>
</tr>
<tr>
<td>8</td>
<td>Save the message.</td>
</tr>
<tr>
<td>9</td>
<td>Save your changes to the restriction list.</td>
</tr>
</tbody>
</table>
7.8 Show Grading Information to Parents and Students

You can remove parents and students from the restriction list to return their access to grading information in PlusPortals.

1. On the navigation bar, click Manage Accounts.

2. Click Settings.

3. Scroll down to Restriction List.

4. To remove one parent or student from the restriction list, click Delete next to their name.

5. To remove multiple parents or students from the restriction list, select the users, and then click Remove Selected [Users].

6. Click Save Restriction List.
7.9 Restrict Parent and Student Access to the Class Page and Lesson Plans

You can prevent restricted users from seeing information on the Class page and lesson plans. In the text editor, you can create a message that displays in the restricted areas.

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Scroll down to Restriction List.
4. Refer to the diagram and table below for the remaining steps.

**Restriction List Process**

5. Restrict selected parents and students from accessing the Class page and lesson plans.

6. Add parents and students to the restriction list.

7. Select all text in the editor. You can then delete the text and replace it with a new message.

8. Type a message for restricted users to see in place of restricted information.

9. Save the message.

10. Save your changes to the restriction list.
7.10 Restrict Parent and Student Access to E-Portfolio

You can prevent restricted users from seeing E-Portfolio documents. In the text editor, you can create a message that displays in the restricted area.

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Scroll down to Restriction List.
4. Refer to the diagram and table below for the remaining steps.

Restriction List Process

5. Restrict selected parents and students from accessing E-Portfolio.

6. Add parents and students to the restriction list.

7. Select all the text in the editor. You can then delete the text and replace it with a new message.

8. Type a message for restricted users to see in place of restricted information.

9. Save the message.

10. Save your changes to the restriction list.
7.11 Manage Password Permissions

The "plusportaladmin" can allow user groups to change or reset their password. Additionally, the "plusportaladmin" can decide whether admin users can see users' temporary passwords.

To allow user groups to change or reset their password, follow these steps:

1. On the navigation bar, click Manage Accounts.
2. Click Settings.
3. Under Password Management, click Yes next to the user groups you want to allow to change or reset their password.

The "plusportaladmin" can control the visibility of temporary passwords by following these steps:

**Warning:** Once you click Yes next to Hide temporary passwords and click Save, you cannot change this setting.

1. To hide temporary passwords from all admin users, including the "plusportaladmin," click Yes next to Hide temporary password.

   **Note:** Admin users won't see temporary passwords on the Manage Accounts page. However, temporary passwords for students that have usernames instead of e-mail addresses remain visible.

2. To hide temporary passwords from all admin users, with the exception of the "plusportaladmin," do the following:
   1. Next to Hide temporary password, click No.
   2. Next to Allow Admin users to see temporary passwords, click No.
3. At the bottom of the Settings tab, click Save.
CHAPTER 8

Calendar

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8.1 Create a Calendar Event

When you create a calendar event, you can set its location, visibility, and event category, and add links and attachments. You can also send an e-mail notification to parents, students, and/or staff to inform them of the new event.

To create a calendar event, follow these steps:

1. On the navigation bar, click Communication > Calendar.
2. Click New Event.

   **Tip:** You can also double-click the day you’re creating the event for, which automatically selects that day as the event date.

The Event dialog box appears.

3. Type the Title, Summary, and Location of the event.
4. Next to Visible To, select which user groups can see the event.
5. If you want the event to appear on the login page, select the Show on Login Page (Public) check box.
Important:
For the calendar to appear on the login page, you must also select the **Use PlusPortals Home Page instead of Login Page** check box and the **Events** check box via **Miscellaneous > Appearance > PlusPortals Home Page**.

To display this event on your Redisite, you must select the the **Show on Login Page(Public)** check box.

6. **Enter the Start Date and End Date** of the event, including the time. Or, select the **All Day Event** check box.

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

7. **Next to Select Category**, do one of the following:
   - Select an existing category from the **Select Category** drop-down list.
   - Create a new category by clicking **New**, typing the category name and selecting a color, and then clicking **Save**.

   **Note:** For more information on event categories, see "Create, Edit, and Delete Event Categories" on page 94.

8. 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 the **Send E-Mail Notification** check box.

9. Click **Save** to post this event to the calendar, where users can click it to view its information.
10. If you selected the **Send E-Mail Notification** check box in step 8, a dialog box appears with the information you added to the new calendar event. Select who the e-mail should be sent to, edit the **Subject** and **Description** if you want, and then click **Send**.

![Send E-Mail Notification dialog box](image)

**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:**

**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 and Cancel buttons](image)
Follow these steps to edit a calendar event:

1. On the navigation bar, click Communication > Calendar.

2. Click Manage Events.

3. Next to the event you want to delete, click Edit.

4. Edit the event as necessary and click Save to save your changes.

Tip: To return to the calendar, click Show Events.
8.3 Delete Calendar Events

Follow these steps to delete an event from the calendar:

1. On the navigation bar, click Communication > Calendar.
2. Click Manage Events.
3. Do one of the following:
   - Next to the event you want to delete, click 🗑️.
   - Select the check boxes for each event you want to delete and click Delete Events.

Tip: To return to the calendar, click Show Events.
8.4 Import Calendar Events from an ICS File

You can import events from an ICS file using the following steps.

1. On the navigation bar, click **Communication > Calendar**.

2. Click **Options > Import Events**.

3. Click **Choose File** and select the ICS file.

4. Type a **Begin Date** and **End Date** for importing the events, or click **to select the dates.**

   **Note:** Only events that fall within this range are imported.

5. Click **Next**.
You can export events to an ICS file using the following steps.

1. On the navigation bar, click Communication > Calendar.

2. Do one of the following:
   - To export all the events, click Options > Export Events.
   - To export selected events, click Manage Events, select the check boxes for the events you want to export, and then click Options > Export.

3. Type a Begin Date and End Date for exporting the events, or click \( \text{Select Dates} \) to select the dates.

   **Note:** Only events that fall within this range of dates are exported.

4. Click Export, and then OK.
8.6 Print Calendar Events

You can generate a list of calendar events and print the list using the following steps:

1. On the navigation bar, click **Communication > Calendar**.

2. Click **Options > Print Events**.

3. Click either **Print Agenda View** or **Print Calendar View**.

4. In the **Filter** drop-down list, select **All** to print all events, or click an event category to print only events in a certain category.

5. Click 📝 and do one of the following:

   - If you’re generating the list in agenda view, select the range of dates you want to search for events. Only events occurring within that date range are printed.
   - If you’re generating the list in calendar view, select the month you want to search. Only events occurring within that month are printed.

6. Click **Print**.
8.7 Create, Edit, and Delete Event Categories

This topic covers how to create, edit, and delete an event category. Event categories organize events and communicate information about them at a glance. You and other users can filter events on the calendar by selecting a category.

To manage calendar event categories, follow these steps:

1. On the navigation bar, click **Communication > Calendar**. The **Calendar** tab opens.

2. Click **New Event**.

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

   - **Create a new category**:
     1. Next to **Select Category**, click **New**.
     2. In the **Add Calendar Category** dialog box, type the **Category** name.
     3. In the **Choose Color** drop-down list, select a color, and then click **Apply**.

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

     4. Click **Save**.

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

   - **Delete an existing category**:
     1. In the **Select Category** drop-down list, select a category, and then click **Delete**.

     4. In the **Event** dialog box, click **Cancel** to exit without creating an event.
8.8 Manage Google Calendar Settings

Administrators can sign in to their Google account from PlusPortals, choose which calendars to display in PlusPortals, and choose how to display those calendars.

To manage your Google Calendar settings, follow these steps:

1. On the navigation bar, click **Communication > Calendar**.
2. Click **Calendar Feed**.
3. If you are not already signed in, click **Sign in with Google**, and follow Google’s prompts to sign in to Google Calendar.
4. Next to the calendar you want to manage, click **Edit**.
5. Enter the calendar’s **Start Date** and **End Date**.
6. In the **Color** drop-down list, select a color for the calendar.
7. If you want the calendar to appear on the login page, select the **Show on Login Page** check box.
   
   **Important:** For the calendar to appear on the login page, you must also select the **Use PlusPortals Home Page instead of Login Page** check box and the **Events** check box via **Miscellaneous > Appearance > PlusPortals Home Page**.
8. In the **Visibility** column, select which user groups can view the calendar.
9. Click **Update** to save the calendar settings.
CHAPTER 9

Communication

9.1 School Announcements, Notifications, and Alerts .......................................................... 97
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9.1 School Announcements, Notifications, and Alerts

There are three options for mass communication in PlusPortals: announcements, notifications, and alerts. They are accessed by clicking **Communication > School Announcements**.

**What's the Difference Between Announcements, Notifications, and Alerts?**

Only announcements appear on the portals' Home page where they are viewable by the public. Notifications and alerts appear in the same panel on the Home page of the portals, with alerts showing in red to indicate their higher importance.

The process for creating an announcement, notification, or alert is almost the same. You can enter the dates for when the message is visible, select which user groups can see it, attach a file, add a link, and choose to send an immediate e-mail notification.

---

**Tip:** On the **Settings** tab, you can set the sort order for how announcements, notifications, and alerts display to your users.
In addition to e-mails, you can maintain communication with students, parents, and teachers through announcements, notifications, and alerts, which appear on the Home page of the portals.

1. On the navigation bar, click Communication > School Announcements. The Announcements tab opens.

2. Click the tab for the type of message you want to create (Announcements, Notifications, or Alerts).

3. Click Create.

4. Type the Title and Description.

5. Enter the Start Date and End Date for when you want the message to show to users.

6. Do any of the following:
   - Next to Visible To, select the user groups you want to show the message to.
   - Attach a file or add a link.
   - Select the Send E-Mail Notification check box to send an immediate e-mail notice to the selected user groups.

   **Note:** If you are creating an announcement, you can select the Show on Login Page (Public) check box to show the announcement on the login page. For it to appear, you must select the Use PlusPortals Home Page instead of Login Page check box and the News check box via Miscellaneous > Appearance > PlusPortals Home Page.

7. Click Save.

**Important:** You must enable announcements, notifications, and alerts to show on the Home page of the Teacher, Parent, and Student portals. To do this, click Permissions > Summary and, under Home Page Permissions, select the Notifications and Alerts and School Announcements check boxes. Scroll down and click Save Settings to save your changes.
9.3 Configure Automated Notifications for Parents and Students

Your school can e-mail automated notifications to students and parents and allow them to choose how frequently they want to receive the notifications. You can also set the week day the notification is sent based on which preference the students and parents choose (weekly, biweekly, or monthly).

1. On the navigation bar, click **Communication > Automated Notifications**.

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

3. If students and parents select to receive notifications weekly, in the **Weekly Send E-Mail notifications on every** drop-down list, select the week day they receive automated notifications.
4. If students and parents select to receive notifications biweekly, in the **Every Two Weeks Send E-Mail notifications on every other** drop-down list, select the week day students and parents receive automated notifications.

5. If students and parents select to receive notifications **Monthly**, do one of the following:

   - Click **Day**, and then enter the day of the month the automated notifications are sent.
   - Click **The**, and then in the drop-down lists, select whether you want monthly notifications to be sent on the first, second, third, fourth, or last day of a given week day.

6. Click **Save**.

**Tip:** You can customize the subject and message body of automated notification e-mails by modifying the **Automated Notifications** template. To edit the template, click **Setup > E-Mail Setup**, and at the top of the **Customize E-Mail Templates** page, click **Automated Notifications**. (See also "E-Mail Templates" on page 116.)
9.4 E-Mails vs. Messages

You can communicate with admin, teacher, student, parent, and group users through e-mails and messages. E-mails are sent to a user’s personal e-mail inbox and their portal inbox while messages are only sent to a user’s portal inbox.

To access e-mails and messages, on the navigation bar, click Communication > E-Mails & Messages.

**Portal E-Mail**

Your portal subscription comes with unlimited cloud-based e-mail. Because a portal e-mail is delivered to a user’s personal e-mail inbox and portal inbox, it is less likely to be missed. Notification icons indicate to users that they have new or unread messages.

As a general guideline, administrators can e-mail anyone in the school, teachers can e-mail their students and their students’ parents, parents can e-mail their children’s teachers and all administrators, and students can e-mail their teachers and all administrators. There are exceptions, such as e-mailing via a group. Group members and their parents can be given permission to e-mail users they normally can’t. For instance, student group members can be given permission to e-mail other student group members.

**Messages**

Messages are similar to e-mails but are designed for communicating within the portals. Therefore, users have to retrieve their messages in the portal. Messages are useful for communicating with users who don’t have an e-mail account. For example, a teacher can send a message to a class of students who do not have an e-mail account but do log in to the portal with a user name.

Administrators can only broadcast a general message, but teachers, students, and parents have a message editor, allowing them to format the text and add hyperlinks, tables, and images to the message.
9.5 Send a Message

Messages are sent and received in PlusPortals, making them accessible to all users regardless of whether or not they have an e-mail.

To send a message, follow these steps:

1. On the navigation bar, click **Communication > E-Mails and Messages**.
2. Click the **Messages** tab.
3. Click **New Message**.
4. Type a **Title**.
5. In **Description**, type your message.
6. Click **Add Recipients**.
7. In the **Select Recipients** dialog box, do any of the tasks described in the table below:

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
</table>
| Add admin users to the recipients list    | 1. Click *Admin Users*.  
2. Select the admin users you want to add to the recipients list, and then click *Next*. |
| Add teachers to the recipients list       | 1. Click *Teachers*.  
2. Select the teachers you want to add to the recipients list, and then click *Next*. |
| Add students and parents to the recipients list | 1. Click *Students and Parents*.  
2. Select the desired grade levels, and then select the students whose information you want the system to gather.  
3. At the bottom of the *Select Recipients* dialog box next to *Send Message To*, select the check box for who you want to message (students and/or parents).  
4. Click *Next*. |
| Add a group to the recipients list        | 1. Click *Groups*.  
2. In the *Select Group* drop-down list, select the group you want.  
3. Under *Select recipients*, select the recipients you want, and then click *Next*. |

**Note:** If you select the *Individuals* check box, another *Select Recipients* dialog box appears. Select the users you want to add to the recipients list, and then click *Next*. 
Tip: Repeat steps 6 and 7 to add multiple user groups to the recipients list.

9.6 Send an E-Mail

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

To send an e-mail, follow these steps:

1. On the navigation bar, click **Communication > E-Mails and Messages**.
2. Click **New E-Mail**.
3. Next to **To**, click **Add Recipients**.

   **Note:** For privacy reasons, recipients of the e-mail are not visible to each other.
4. In the **Select Recipients** dialog box, do any of the tasks described in the table below.

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add admin users to the recipients list.</td>
<td>1. Click <strong>Admin Users</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. Select the admin users you want to add to the recipients list, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>Add teachers to the recipients list.</td>
<td>1. Click <strong>Teachers</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. Select the teachers you want to add to the recipients list, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>Add students and parents to the recipients list.</td>
<td>1. Click <strong>Students and Parents</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. Select the desired grade levels, and then select the students whose information you want the system to gather.</td>
</tr>
<tr>
<td></td>
<td>3. At the bottom of the <strong>Select Recipients</strong> dialog box next to <strong>Send Email To</strong>, select the check box for who you want to email (students and/or parents).</td>
</tr>
<tr>
<td></td>
<td>4. Click <strong>Next</strong>.</td>
</tr>
<tr>
<td>Add a group to the recipients list.</td>
<td>1. Click <strong>Groups</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. In the <strong>Select Group</strong> drop-down list, select the group you want.</td>
</tr>
<tr>
<td></td>
<td>3. Under <strong>Select recipients</strong>, select the recipients you want, and then click <strong>Next</strong>.</td>
</tr>
</tbody>
</table>

**Note:** If you selected the **Individuals** check box, another **Select Recipients** dialog box appears. Select the users you want to add to the recipients list, and then click **Next**.
5. In the next **Select Recipients** dialog box, verify the recipients, and then click **OK**.

   **Note:** If you select users who don’t have an e-mail address, PlusPortals notifies you before you click **OK**.

   **Tip:** Repeat steps 3-5 to add multiple user groups to the recipients list.

6. Next to **Cc** and **Bcc**, click **Add Recipients**, and then repeat steps 4 and 5.

7. Next to **Subject**, type the subject of the e-mail.

8. To attach a file, click **Attach File From** next to **Attachments**, and locate the file on your computer.

   **Important:** The file size limit is 10 MB.

9. Type the content of your e-mail in the text editor.

10. 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.
You can create an e-mail signature to personalize your outgoing mail. Once created, your signature appears in the text editor whenever you draft a new e-mail.

To create an e-mail signature, follow these steps:

1. On the navigation bar, click Communication > E-Mails and Messages.
2. Click New E-Mail.
3. At the bottom of the New E-Mail page, click E-Mail Signature.
4. Type your signature in the E-Mail Signature text editor, format your signature using the options in the text editor, and then click Save.

**Tip:** You can also create your e-mail signature by clicking Edit Profile on the page header and then clicking E-Mail Signature.
9.8 E-Mail Event Types

The events displayed on the Statistics tab of the E-Mail Analytics page represent the status of e-mails.

There are five types of events:

- **Delivered**: the number of e-mails received by 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 are e-mails that can't be sent to the intended recipient, and **Deferred** e-mails are e-mails that can be sent but can't be received. When an e-mail is **Deferred**, PlusPortals tries 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

For more information, see "View E-Mail Statistics" on page 111.
9.9 View E-Mail Statistics

You can view the general status of e-mails sent from PlusPortals for a selected date range. With this information, you can observe how users interact with your school’s e-mails.

To view the status of e-mails, follow these steps:

1. On the navigation bar, click **Miscellaneous > E-Mail Analytics**. The **Statistics** tab opens.

2. Under **Events**, select the check boxes for the events you want to view. (For more information on event types, see "E-Mail Event Types" on page 110.)

3. Under **Date Range**, click ![Calendar icon] to 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.

4. Under the graph, set the x-axis interval by selecting **Days**, **Weeks**, or **Months**.

**Note:** E-Mail Analytics data represents 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 on the **Statistics** tab, the **Activity Feed** tab, or the **Suppressions** tab.
9.10 View E-Mails Sent from PlusPortals

You can view the e-mails sent from PlusPortals during a selected date range, the intended recipients of the e-mail, and the status of each e-mail.

**Note:** E-Mail Analytics data represents 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 on the Statistics tab, the Activity Feed tab, or the Suppressions tab.

To view the e-mails sent from PlusPortals, follow these steps:

1. On the navigation bar, click **Miscellaneous > E-Mail Analytics**.
2. Click **Activity Feed**.
3. Do any of the following:
   - Under **Search by**, click **E-Mail Subject** or **Recipient**, and then type a search term.
   - Under **Date Range**, click and set the **Start Date** and **End Date**, or leave the default dates.
   - Next to **Subject**, **Date**, or **Sender**, click to filter the results.

![E-Mail Analytics interface](image)
To access more information regarding the recipients of an e-mail, follow these steps:

1. Next to the e-mail, click $\mathbb{E}$. The E-Mail Statistics dialog box appears, listing the recipients of the e-mail.

2. Do any of the following:

   - In **Search by E-Mail Address**, type an e-mail address.
   - Next to **Event Type**, **E-Mail Address**, or **Date**, click $\mathbb{T}$ to filter the results.

   **Note:** **Event Type** refers to the status of the e-mail, such as Delivered, Opened, Clicked, Bounced or Dropped. For an explanation of the event types, see “E-Mail Event Types” on page 110.

3. For **Dropped** e-mails, place your pointer over $\mathbb{I}$ to display the reason the e-mail wasn't delivered to the e-mail address.

   **Note:** When an e-mail is Deferred, PlusPortals tries to send it again.
9.11 View Undelivered E-Mails

You can view all undelivered e-mails for a selected date range, the intended recipients of the e-mails, and the reasons they weren’t delivered.

**Note:** E-Mail Analytics data represents 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 on the Statistics tab, the Activity Feed tab, or the Suppressions tab.

To view undelivered e-mails, follow these steps:

1. On the navigation bar, click **Miscellaneous > E-Mail Analytics**.
2. Click **Suppressions**.
3. On the Suppressions tab, do any of the following:
   - Under **Search by E-Mail Address**, type an e-mail address.
   - Under **Date Range**, click 🗓 and 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.
   - Next to **Event Type**, **E-Mail Address**, **Date**, or **Event Summary**, click ⬇️ to filter the results.
   - Point to ⚪️ to display e-mail details, such as the **Subject** and the **Sender**.

**Note:** To remove a bounced e-mail, please e-mail us at portalsupport@rediker.com. A historical record of this bounce still appears after the bounced address is removed.
10.1 E-Mail Templates

You can create an e-mail template or copy a template and change it as needed. PlusPortals has the following templates you can customize:

- **Login Credentials**: E-mail new users a link to set their password and sign in to PlusPortals.
- **Forgot Password**: E-mail users a link to reset a forgotten password.
- **Automated Notifications**: E-mail users who opt-in to receiving Automated Notifications. For more information, see “Configure Automated Notifications for Parents and Students” on page 99.

For more information about e-mail templates, see the following topics:

- "Customize PlusPortals E-Mail Templates" on page 117
- "Create an E-Mail Template" on page 118
- "Copy an E-Mail Template" on page 119
10.2 Customize PlusPortals E-Mail Templates

PlusPortals has three templates you can customize: Login Credentials, Forgot Password, and Automated Notifications. For more information on the templates, see “E-Mail Templates” on page 116.

To customize a PlusPortals e-mail template, follow these steps:

1. On the navigation bar, click **Setup > E-Mail Setup**.

2. At the top of the **Customize E-Mail Templates** page, click the template you want to customize (**Login Credentials**, **Forgot Password**, or **Automated Notifications**).

3. Edit the template, and then click **Save**.
10.3 Create an E-Mail Template

To create an e-mail template, follow these steps:

1. On the navigation bar, click Setup > E-Mail Setup.
2. At the bottom of the Customize E-Mail Templates page, click Create New Template > Blank Template.
3. Type the Template Name and Subject.
4. In the Message Body, type the content of the e-mail.

   **Note:** Available Macros, located to the right of the Message Body, displays a list of preset variables called macros. The macros are automatically replaced with your school’s PlusPortals information when the e-mail is sent. For example, the [school.name] macro is automatically replaced with your school’s name. You can add a macro to the Message Body by typing the macro exactly as it appears in the Macro column.

5. Click Save.
10.4 Copy an E-Mail Template

You can create a new e-mail template by copying a PlusPortals e-mail template, editing its contents, and renaming it. You can use the preset list of macros, which are automatically replaced with your school’s information when you send the e-mail, to further customize your new template.

**Note:** You cannot copy the **Forgot Password** and **Automated Notifications** templates using the steps below. To copy these templates, use your keyboard shortcut keys to copy the content from the template and then paste it into a blank e-mail template.

To copy an e-mail template, follow these steps:

1. On the navigation bar, click **Setup > E-Mail Setup**.
2. In the **E-Mail Template** drop-down list, select the template you want to copy.
3. At the bottom of the **Customize E-Mail Templates** page, click **Create New Template > Copy Current**.

![Customize E-Mail Templates](image)
4. Type the **Template Name**.

5. Edit the **Subject** and **Message Body**.

   **Note: Available Macros**, located to the right of the **Message Body**, displays a list of preset variables called macros. The macros are automatically replaced with your school’s PlusPortals information when the e-mail is sent. For example, the `[school.name]` macro is automatically replaced with your school’s name. You can add a macro to the **Message Body** by typing the macro exactly as it appears in the **Macro** column.

6. Click **Save**.

The image below shows an example of a sent e-mail containing macros.

---

**PlusPortals user account activation details**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Dear Andrew Andelonis Sr.,

You may now login to PlusPortals by clicking the below link or copying and pasting it into your browser:

https://www.plusportals.com/Account/Activate?School=AndrewSchool&ID=5E7359A5AED43D6B33849FB350CA3D0

Clicking on this link will lead you to a page where you can set your password. After setting your password, you will be able to login to PlusPortals. To access your account in the future, store the following URL in your favorites and log in using the provided username and your set password.

URL: https://www.plusportals.com/AndrewSchool

Username: andrew@rediker.com

Andrew Andelonis
ANDREW ANDERLONIS SCHOOL
# Groups

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11.1 Groups

Groups can be used by non-teaching staff members (such as guidance counselors, principals, or athletic coaches) who need to access staff and/or student portal pages. These users can check students’ grades and progress or view teachers’ class pages.

For users who don't have a teacher or admin account and need to access a group page, do the following:

- **For non-teaching staff:** Assign the user a staff account in the TeacherPlus Gradebook Sync Manager in AdminPlus, and they can log in to the portal and access the group.

- **For administrators:** Assign the user an admin account in PlusPortals, and they can access the group from the admin portal.

Teachers can access groups on their portal page. Administrators can access groups by clicking **Miscellaneous > View Groups**.
11.2 Create a Group

You can create a group to give a non-teaching staff member (such as a guidance counselor, principal, or athletic coach) access to staff and/or student portal pages.

To create a group, follow these steps:

1. On the navigation bar, click **Setup > Groups**.
2. Click **New Group**.
3. Type a **Group Name** and **Description**.
4. Under **Visibility of Group Page and Calendar**, select who you want the group page and calendar to be visible to.

5. To add users to a group, see step 3 of “Assign Users to a Group” on page 124. Otherwise, click **Save Group** to save your group and return to the **Create and Manage Groups** page.
11.3 Assign Users to a Group

This topic covers adding users to a group as either group heads or group members. Group heads have more rights than group members and can view the portal pages of group members.

Add Group Heads to a Group

1. On the navigation bar, click Setup > Groups.
2. Next to the group you want to add users to, click .
3. On the Group Heads tab, click Add.
4. In the Select Group Head dialog box, click which type of user (Admin, Student, Staff, or Parent) you want to assign as a group head.
5. Select the users you want to make group heads, and then click OK.

Note: At the bottom of the dialog box, click the numbers to view another page of users. Or, in the Users per page drop-down list, click to view 10, 20, 50, or 100 users at a time.

Tip: You can assign multiple types of users as group heads for a group. After clicking OK, repeat steps 3-5, clicking a different type of user this time. You must click OK before switching between types of users to save your selections.

6. To set permissions for users, see step 3 of “Set Group Permissions” on page 128. Otherwise, at the bottom of the Edit Group page, click Save Group to save your group and return to the Create and Manage Groups page.

Add Student Group Members to a Group

1. On the navigation bar, click Setup > Groups.
2. Next to the group you want to add users to, click .
3. Click the Group Members tab, or click Next: Add Group Members.
4. To add student group members, do any of the following tasks.
<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Add all students in your school. Under <strong>Students</strong>, click <strong>All Students</strong>.</td>
</tr>
<tr>
<td>B</td>
<td>Add all students from a specific grade level. 1. Under <strong>Students</strong>, click <strong>Students matching the below criteria</strong>. 2. Select the grade levels of the students you want to add.</td>
</tr>
<tr>
<td>C</td>
<td>Add students from a database search. 1. Under <strong>Students</strong>, click <strong>Students matching the below criteria</strong>. 2. Under <strong>Students matching DB criteria</strong>, click the desired search criteria in the drop-down lists and type the keyword you’re searching for. <strong>Note</strong>: Your search results are automatically added to your group. To see the results of your search, click <strong>View Students in Group</strong>.</td>
</tr>
<tr>
<td>D</td>
<td>Add individual students. 1. Under <strong>Students</strong>, click <strong>Students matching the below criteria</strong>. 2. Next to <strong>Individual Students</strong>, click <strong>Add</strong>. 3. Under <strong>Students from which grades</strong>, select the grade levels of the students you want to add. 4. Under <strong>Which Students</strong>, select the students you want to add, and then click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>

**Tip**: At the top of the **Group Members** tab, you can click **View Students in Group** to view the students you have added to your group. In the **PlusPortals** dialog box, click **Yes** to save the group details and view the group members.
4. To set permissions for users, see step 3 of "Set Group Permissions" on page 128. Otherwise, at the bottom of the Edit Group page, click Save Group to save your group and return to the Create and Manage Groups page.

Add Staff Group Members to a Group

1. On the navigation bar, click Setup > Groups.
2. Next to the group you want to add users to, click .
3. Click the Group Members tab, or click Next: Add Group Members.
4. To add staff group members, do any of the tasks described in the table below.

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Add all staff members in your school. Under Staff, click All Staff.</td>
</tr>
<tr>
<td>B</td>
<td>Add staff from a database search. 1. Under Staff, click Staff matching the below criteria. 2. Under Staff matching DB criteria, click the desired search criteria in the drop-down lists and type the keyword you’re searching for. <strong>Note:</strong> Your search results are automatically added to your group. To see the results of your search, click View Staff in Group .</td>
</tr>
<tr>
<td>C</td>
<td>Add individual staff. 1. Under Staff, click Staff matching the below criteria. 2. Next to Individual Staff, click Add. 3. Select the check boxes for the staff members you want to add, and then click OK.</td>
</tr>
</tbody>
</table>
Tip: At the top of the **Group Members** tab, you can click **View Staff in Group** to view the staff you have added to your group. In the **PlusPortals** dialog box, click **Yes** to save the group details and view the group members.

5. To set permissions for users, see step 3 of "Set Group Permissions" on page 128. Otherwise, at the bottom of the **Edit Group** page, click **Save Group** to save your group and return to the **Create and Manage Groups** page.
11.4 Set Group Permissions

You can decide who group heads, group members, and parents of student group members can e-mail. For group heads, you can decide which student and teacher information they can access, give them the ability to add or remove student group members, and control the group's visibility.

To set group permissions, follow these steps:

1. On the navigation bar, click Setup > Groups.
2. Next to the group you want to edit, click .
3. Click the Permissions tab.
4. Select the check boxes for the permissions you want to enable and then click Save Group to save the group.

![Permissions Settings](image-url)
12.1 The Course Request Process

The course request process is performed in the following order:

**Important:** Before starting the course request process, see "Course Request Settings" on page 132 and select the year you want to make changes to.

1. You review your course request settings to make sure your changes are made in the correct year.
2. You create a group of courses to add to a course request form.
3. You create a course request form.
4. Optional: You can recommend courses for students to take or remove course recommendations.
5. Optional: You can add or copy course descriptions to the Course Catalog.
6. You publish the form for students to complete.
7. Students complete the course request form.
8. If parents want, they can approve and comment on their child’s course selections.
9. You review, approve, and send the course request form to AdminPlus, where the office receives it for processing.

Create a Course Request Form

- "Course Request Settings" on page 132
- "Create a Course Group" on page 133
- "Create a Course Request Form" on page 135
- Optional: "Recommend Courses for an Individual Student" on page 138
- Optional: "Recommend Courses for Several Students at Once" on page 140
- Optional: "Remove Course Recommendations for an Individual Student" on page 141
- Optional: "Remove Course Recommendations for Several Students at Once" on page 142

Publish Course Request Forms

- Optional: "Add a Course Description" on page 143
- Optional: "Copy Course Descriptions" on page 144
- "Publish a Course Request Form" on page 145
Review and Approve Course Requests

- "Review and Approve Course Requests for One Student" on page 146
- "Review and Approve Course Requests for Several Students" on page 148

Additional Information

For additional information that may be relevant to your process, see the following topics:

- "Export Course Reports" on page 150
- "Export the Course Catalog" on page 149
12.2 Course Request Settings

Before creating, managing, or approving course requests, make sure you are working in the correct year by checking the year selected in the course request settings. All course request tasks you perform affect the selected year.

To set the course request year, follow these steps:

1. On the navigation bar, click Setup > Course Requests > Settings.
2. Next to Use Course Requests in Which Year, do one of the following:
   - To perform course request tasks in the current school year, click Active Year.
   - To perform course request tasks in a school year that is still being scheduled, click Scheduling Year.
3. Click Save.

![Course Requests Settings](image-url)
12.3 Create a Course Group

Creating a course group allows you to group together courses (for example, English courses being offered second semester) which can then be added to a section on a course request form. Students select the course they want to take from the offerings in the course group.

**Important:** Before creating a course group, ensure that you are working in the correct year, since all course request tasks affect the selected year. To check what year you are working in and, if necessary, make a change, see “Course Request Settings” on page 132.

To create a course group, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Course Request Forms**.
2. At the bottom of the **Course Request Forms** page, click **Next: Add Section**.
3. Click **Add/Edit Course Group**.
4. In the **Groups** dialog box, click **New**.
5. Type a **Course Group Name**, and then click **Add Course(s)**.

![Course Group Creation](image-url)
6. In the **PlusPortals: Select Courses** dialog box, click the course you want to add, and then click **Add**.

**Tip:** You can add multiple courses at once by holding **Shift** or **Ctrl** while clicking the courses.

7. In the **Groups** dialog box, click **Save**, and then click **OK**.
12.4 Create a Course Request Form

A course request form consists of sections that contain courses for students to choose from. When creating a course request form, you create sections, add descriptions and courses to a section, and determine how many courses within a section a student may choose.

**Important:** Before creating a course request form, ensure that you are working in the correct year, since all course request tasks affect the selected year. To check what year you are working in and, if necessary, make a change, see “Course Request Settings” on page 132.

**Note:** To simplify the process of creating a course request form, we recommend that you first create course groups. This way, you can add the course groups when creating your course request form. For more information, see “Create a Course Group” on page 133.

To create a course request form, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Course Request Forms**.
2. At the bottom of the **Course Request Forms** page, click **New Form**.
3. In **Form Name**, type the name of your course request form.
4. In the **Description** text editor, type a description.
5. Click **Next: Add Section**.
6. In **Section Name**, type a name for this section.

7. In the **Description** text editor, type a description.

8. In the **Select Course Group** drop-down list, click a course group to add those courses to a section. (For information on how to create a course group, see "Create a Course Group" on page 133.)

9. Optional: To make changes to a course group, click **Add/Edit Course Group**, and then do one of the following:

<table>
<thead>
<tr>
<th>Task</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a course to a course group.</td>
<td>1. On the left panel of the <strong>Groups</strong> dialog box, click <strong>Add Course(s)</strong>.</td>
</tr>
<tr>
<td></td>
<td>2. In the <strong>PlusPortals: Select Courses</strong> dialog box, select a course, and then click <strong>Add</strong>.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Save</strong>, and then click <strong>OK</strong>.</td>
</tr>
<tr>
<td>Remove a course from a course group.</td>
<td>1. On the left panel of the <strong>Groups</strong> dialog box, click a course group.</td>
</tr>
<tr>
<td></td>
<td>2. Click a course, and then click <strong>Remove Course(s)</strong>.</td>
</tr>
<tr>
<td></td>
<td>3. Click <strong>Save</strong>, and then click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>
10. Next to **Allow Multiple Selection**, do one of the following:

   - Click **Yes** to allow students to make multiple selections in this section and type the minimum and maximum number of selections a student can make.
   - Click **No** to allow students to make only one selection in this section of your form.

11. Click **Save**, and then click **OK**.

12. To add a new section to your form, click **New Section**, and then repeat steps 6–11.

   **Tip:** To rearrange the order of sections on your form, click **Change Order**, and then drag the sections into the order you want. When you’re finished, click **Save**, and then click **OK**.

13. When you’ve completed your form, click **Back to Course Form**. There, you can click **Preview** to view the form you created.
12.5 Recommend Courses for an Individual Student

During the course request process, you can recommend courses for a student. Course recommendations are suggestions and aren’t permanently assigned to students. The students see your recommendations when they complete their course request form.

To recommend courses for an individual student, follow these steps:

**Important:** If you haven’t already, see "Course Request Settings" on page 132 and check that you are set to the correct year before doing any course request tasks.

1. On the navigation bar, click Setup > Course Requests > Course Recommendations.
2. On the left, in the Student Name column, click a student.
3. At the bottom of the page, click Add Recommendation.
4. In the Plusportal dialog box, select the courses you want to recommend, and then click Next.

**Tip:** You can add a comment to a course recommendation, which students can see on their course request form. In the Courses table, click a course you’ve recommended. Click Edit above the Recommendations box, type the comment, and then click Save.
The following diagram and table summarize the remaining steps in the course recommendation process:

**Course Recommendations Process**

5. Select a student to recommend courses for.

6. Add course recommendations.

7. Any courses you recommend appear in the **Courses** table.

8. Type a comment for the selected recommended course. Students see the comment on the course request form.
12.6 Recommend Courses for Several Students at Once

You can recommend courses to several students at once by doing a batch recommendation. Course recommendations are suggestions and aren’t permanently assigned to students. The students see your recommendations when they complete their course request form.

**Important:** If you haven’t already, see "Course Request Settings" on page 132 and check that you are set to the correct year before doing any course request tasks.

1. On the navigation bar, click **Setup > Course Requests > Course Recommendations**.
2. Click **Batch Add Recommendation**.
3. The following diagram and table summarize the remaining steps in the course recommendations process:

![Course Recommendation Process Diagram](image)

<table>
<thead>
<tr>
<th></th>
<th>Course Recommendation Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Select the grades the students are currently in.</td>
</tr>
<tr>
<td>5</td>
<td>Select the students you’re recommending courses for.</td>
</tr>
<tr>
<td>6</td>
<td>Select the courses you’re recommending.</td>
</tr>
<tr>
<td>7</td>
<td>Complete the course recommendation process.</td>
</tr>
</tbody>
</table>
12.7 Remove Course Recommendations for an Individual Student

To remove course recommendations for an individual student, follow these steps:

**Important:** If you haven't already, see "Course Request Settings" on page 132 and check that you are set to the correct year before doing any course request tasks.

1. On the navigation bar, click **Setup > Course Requests > Course Recommendations**.

2. Follow the steps summarized in the diagram and table below to remove course recommendations.

---

**Course Recommendation Removal Process**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Select a student.</td>
</tr>
<tr>
<td>4</td>
<td>Select the recommended course you want to remove.</td>
</tr>
<tr>
<td>5</td>
<td>Remove the course.</td>
</tr>
</tbody>
</table>
To remove course recommendations for several students, follow these steps:

**Important:** If you haven’t already, see "Course Request Settings" on page 132 and check that you are set to the correct year before doing any course request tasks.

1. On the navigation bar, click **Setup > Course Requests > Course Recommendations**.

2. Click **Batch Remove Recommendation**.

3. Follow the steps summarized in the diagram and table below to remove course recommendations.

### Course Recommendation Removal Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Select the grades the students are currently in.</td>
</tr>
<tr>
<td>5</td>
<td>Select the students you’re removing course recommendations for.</td>
</tr>
<tr>
<td>6</td>
<td>Select the courses you’re removing.</td>
</tr>
<tr>
<td>7</td>
<td>Complete the course recommendation removal process.</td>
</tr>
</tbody>
</table>
12.9 Add a Course Description

You can add a course description to the course catalog. While completing a course request form, students can see the description if they choose to display more information about the course.

**Important:** Before adding a course description, make sure you are working in the correct year, since all course request tasks affect the selected year. To check what year you are working in and, if necessary, make a change, see “Course Request Settings” on page 132.

To add a course description, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Course Catalog**.
2. Click the course you want to edit.
3. Type the course description in the text editor.
4. Click **Save**.
12.10 Copy Course Descriptions

If you want to reuse course descriptions, you can copy the descriptions into another year and, if necessary, edit them.

To copy course descriptions, follow these steps:

1. Click Setup > Course Requests > Settings.

   **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 are copied from the previous year, overwriting the active year.
   - If Setup > Course Request > Settings is set to Scheduling Year, the descriptions are copied from the active year, overwriting the scheduling year.

   Check this setting before you perform the following step.

2. Click the year you want to copy into, and then click Save.

3. On the navigation bar, click Setup > Course Requests > Course Catalog.

4. At the bottom of the Course Catalog page, click Add from Library.

5. To continue, click Yes. To cancel, click No.

6. If you want to edit a course description, click the course, and then edit the description in the text editor.

7. Click Save.
12.11 Publish a Course Request Form

After creating a course request form, you can select the students who need to complete it and publish the form to their student portals.

1. On the navigation bar, click **Setup > Course Requests > Publish Forms**.

2. In the **Select Course Request Form** drop-down list, select the form you want to publish.

3. At the bottom of the page, click **Add Students**.

4. Select the grades of the students you want to give form access to, and then select the students.

5. Click **Next** to publish the form.
After a student has completed a course request form, you can review and approve the course requests before sending the form to AdminPlus for the office to process.

To review and approve course requests for an individual student, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Review Requests**.

2. In the **Select Course Request Form** drop-down list, select the form you want to review.
   
   **Tip:** At the bottom of the page, click the numbers to view another page of students. Or, in the **Users per page** drop-down list, click to view 10, 20, 50, or 100 users at a time.

3. Next to the student’s name, click ![ ], to review their course request form.
   
   **Note:** If a student has commented on a course, the course title displays blue.

4. Next to a course, click ![ ] to reveal student and parent comments.

5. Do one of the following:
   
   - If you approve the student’s course selection, select **Approved by Reviewer**.
     
     **Note:** If you have any comments about a student’s course selection, you can type them under **Reviewer’s Remarks**. Your remarks are visible to both students and parents.

     **Tip:** To approve all the courses the student has selected, click **Approve All Selected Course Requests** at the bottom of the course request form.

   - If you don’t approve the student’s course selection, select a different course, and then select **Approved by Reviewer** for that course.

     **Note:** When the schedule is being built, the Schedule Builder in AdminPlus gives the reviewer’s course selection precedence over a student’s course selection.
6. At the bottom of the form, do one of the following:

- To save your changes as a draft, click **Save & Revisit Later**.
- To submit the form to AdminPlus, click **Submit**.

**Warning:** Only click **Submit** when you're sure that you want the course request form to be sent to AdminPlus. Once you click **Submit**, you can't edit the course request form.
12.13 Review and Approve Course Requests for Several Students

After a student has completed a course request form, you can review and approve the course requests before sending the form to AdminPlus for the office to process.

To review and approve course requests for several students at once, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Review Requests**.
2. In the **Select Course Request Form** drop-down list, select the form you want to review.
3. Select the students whose courses you want to approve.
4. Click **Approve Selected Course Requests** to send the course requests to AdminPlus.

The following diagram and table explain the main features of the **Review Requests** page.

![Diagram](image)

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview of Course Request Review and Approval</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Name</td>
<td>APD</td>
<td>Date Submitted</td>
<td>Date Reviewed</td>
<td>Date Received</td>
</tr>
<tr>
<td>Abubakr Jordan</td>
<td>11001</td>
<td>09-10-2015</td>
<td>08-10-2015</td>
<td>08-11-2015</td>
</tr>
<tr>
<td>Adams, Almea</td>
<td>11002</td>
<td>09-10-2015</td>
<td>08-10-2015</td>
<td>08-11-2015</td>
</tr>
</tbody>
</table>

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

To export the course catalog as an HTML document, follow these steps:

1. On the navigation bar, click Setup > Course Requests > Course Request Exports.

2. Click Course Catalog, and then click OK.

3. Open the HTML file in your downloads folder. You can view this file in your web browser.
12.15 Export Course Reports

You can generate reports on course recommendations, course requests, and course request form statuses. Export these reports as individual Excel files or all at once in a combined report.

To export course reports, follow these steps:

1. On the navigation bar, click **Setup > Course Requests > Course Request Exports**.

2. Click **Combined Report** to export three reports as one file, or click each individual report you want to export, and then click **OK**.

3. Open the Excel file(s) in your downloads folder.
13.1 The Unit Builder ........................................................................................................152
13.2 Create a Unit .............................................................................................................153
13.3 Edit a Unit ................................................................................................................155
13.4 Delete a Unit ..............................................................................................................156
13.5 Add Files to a Unit ....................................................................................................157
13.6 Add Links to a Unit ...................................................................................................158
13.7 Copy Content from a Unit .......................................................................................159
13.1 The Unit Builder

A unit is essentially a folder you can fill with files and links. Assign the unit to a course or section to provide teachers with the resources you want them to use in their curriculum. Teachers see the units in their Lesson Planner. To get started, see "Create a Unit" on page 153.

You can add new files and links to a unit or copy content from an existing unit. For more information, see the following topics:

- "Add Files to a Unit" on page 157
- "Add Links to a Unit" on page 158
- "Copy Content from a Unit" on page 159

To edit or delete a unit, see the following topics:

- "Edit a Unit" on page 155
- "Delete a Unit" on page 156.

You can give other admin users access to the Unit Builder. You can also give teachers permission to edit the content of units created by admin users, create their own unit, and/or add files and links to a unit. For more information, see the following topics:

- "Give Admin Users Access to the Unit Builder" on page 54
- "Set Teacher Permissions for the Unit Builder" on page 67
13.2 Create a Unit

When you create a unit 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 in one location automatically updates the other. Teachers can only edit the content of a unit if an admin user with Unit Builder access gives them permission.

To create a new unit, follow these steps:

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

2. Click **Add a Unit**.

3. In the red box, type a name for the unit.

![Unit Builder screenshot]

**Note:** Unit names can be up to 200 characters. If the entire name doesn't fit in the **Unit Name** column or if a unit was created or edited by a teacher, an information icon appears. Point to the icon to view the full name or to see who created or edited the unit.

4. Next to the new unit name, click **Assign**.
5. In the **Assign Unit To Classes** dialog box, do one of the following:
   - To add the unit to a course, click **Course** next to **Assign By**.
   - To add the unit to a section, click **Section** next to **Assign By**.

6. In the **Available** list, click the course or section you want to assign the unit to.

   **Tip:** You can hold **Ctrl** or **Shift** and click to select multiple courses or sections. You can also select one course or section, hold **Shift** and then click any course or section below the first to select these courses and every course in-between them.

7. Click ▶️ to move courses or sections to the **Selected** list, or click ▶️ to move all courses or sections to the **Selected** list.

![Assign Unit To Classes dialog box](image)

8. Click **Done**.

9. Enter the **Start Date** and **End Date** for the unit by clicking ⌚️ and then the date or by 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. Click ✒️ to save the unit.
13.3 Edit a Unit

You can edit a unit's name and start and end dates, and assign or remove courses or sections to the unit.

Note: If you originally assigned the unit to courses, you cannot assign it to sections and vice versa.

To edit a unit, follow these steps:

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

2. In the Tools column, next to the unit you want to edit, click .

3. Make your changes, and then click .
13.4 Delete a Unit

To delete a unit, follow these steps:

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

   Warning: If you delete a unit, that unit is deleted from the Unit Builder and all courses or sections it is assigned to. In addition, any lesson plans and content that teachers have added to that unit are deleted.

2. In the Tools column, next to the unit you want to delete, click 👤.

3. Click Confirm.
13.5 Add Files to a Unit

To add files to a unit, follow these steps:

**Important:** The file size limit is 50 MB.

1. On the navigation bar, click **Setup > Unit Builder**.
2. Under **Tools**, next to the unit you want to edit, click ▪. The **Add Teacher Resources** dialog box appears.

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

3. Next to **Add**, click **Files**.
4. Click **Add Files**, navigate to your file, and then select your file.

5. In the **Add File Descriptions** dialog box, type a description for the file.
6. In the **Select Folder** drop-down list, select a folder, or click **New** to create a new folder.

   **Note:** Adding a description to the **Description** box and assigning a folder is optional. If you don’t choose a folder, your file is saved to the **Default Folder**.

7. Click **Done**.
13.6 Add Links to a Unit

To add links to a unit, follow these steps:

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

2. Under Tools, next to the unit you want to edit, click .

The Add Teacher Resources dialog box appears.

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

3. Next to Add, click Links.

4. Click Add Links.

5. In the Add Links dialog box, type a Link Name, URL, and Description.

6. In the Folder drop-down list, select a folder, or click New to create a new folder.

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

7. Click Save.

8. In the Add Teacher Resources dialog box, click Done.
13.7 Copy Content from a Unit

You can copy a unit’s name, start and end dates, and teacher resources, and then apply them to another unit.

To copy content from an existing unit, follow these steps:

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

2. In the Tools column, 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.

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 does not automatically assign the selected unit’s classes to the unit you are editing.

5. Under Tools, click 📝.
CHAPTER 14

School Resources

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14.1 Add a Link or File from Library

Using the Add from Library feature, you can add links or files that you previously uploaded to the portal.

To add a link or file from library, follow these steps:

1. On the navigation bar, click **Communication > School Resources**.
2. In either the **Links** or **Files** tab, click **Add from Library** to add a previously uploaded link or file.
3. In the **PlusPortals** dialog box, select the links/files you want to add, and then click **Next**.
14.2 Add a New File

You can add a file and decide which user groups can see it on their portal Home page. You can also display the file on the login page and send an e-mail notification to users with the file attached.

**Important:** Posted files can be up to 50 MB in size. Files attached to e-mails can be 10 MB.

To add a new file, follow these steps:

1. On the navigation bar, click **Communication > School Resources.** The **Links and Files** tab opens.
2. Click the **Files** tab.
3. Click **Add New,** and then click the location you want to browse for files.
4. Select the file you want to upload. The **PlusPortals** dialog box appears.
   
   **Tip:** You can select multiple files to upload by holding the **Ctrl** key while clicking each file.
5. In the **PlusPortals** dialog box, do the following:
   
   - Type a **Description** for the file you've selected.
   - Next to **Select Folder,** do one of the following:
     
     - Select an existing folder from the drop-down list.
     - Create a new folder by clicking **New.** Type a **Folder Name,** click **Save,** and then click the folder you just created from the drop-down list.
   
   - If you want to display this resource on the public login page, select the **Show on Login Page (Public)** check box.

**Note:** You must also enable the resource to display on the public login page when customizing that page. (See "Customize the PlusPortals Home Page" on page 26.)
- Next to Visibility, select the users you want this resource to be visible to.
- If you want to e-mail the resource to the users selected in the previous step, select the Send E-Mail Notification check box.
- Click Save.
14.3 Add a New Link

You can add a link and decide which user groups can see it on their portal Home page. You can also display it on the login page and send an e-mail notification with the link to users.

To add a new link, follow these steps:

1. On the navigation bar, click Communication > School Resources. The Links and Files tab opens.

2. In the Links tab, click Add New.

3. In the PlusPortals dialog box, do the following:
   - Type a Description, Link Name, and the URL.
   - Next to Select Folder, do one of the following:
     - Select an existing folder from the drop-down list.
     - Create a new folder by clicking New. Then add a Folder Name, click Save, and click the new folder you created from the drop-down list.
   - If you want to display this resource on the public login page, select the Show on Login Page (Public) check box.
   - Next to Visibility, select the users you want this resource to be visible to.
   - If you want to send an e-mail notification with the resource to the users you previously selected, select the Send E-Mail Notification check box.
   - Click Save.
CHAPTER 15

View Reports

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15.1 Generate a Report of Students' Contact Information

You can generate and print a report of students' contact information.

1. On the navigation bar, click Miscellaneous > Reports/Statistics. The Reports tab opens.

2. In the left pane, click Student List with Contacts.

3. Under Student List with Contacts Specifications, click one of the following:
   - All: Display the contact information of all students.
   - Grade Level: Select the grade levels you want to include in your report.

4. At the bottom of the page, click Generate Report.
15.2 Generate a Report of Users' Login Status

You can generate and print a report of parent, student, teacher, or administrator login information.

1. On the navigation bar, click **Miscellaneous > Reports/Statistics**. The **Reports** tab opens.
2. On the left pane, click **User List**.
3. Under **User List Specifications**, next to **Users**, click one of the following:
   - **Logged In**: Generate a report of users and the last time they logged in.
   - **Not Logged In**: Generate a report of users who are not logged in to a portal.
4. Do one of the following:
   - If you clicked **Logged In**, enter the dates you want to view in your report, and click **Parents, Students, Teachers, or Admin**, depending on which type of user report you want to generate.
   - If you clicked **Not Logged In**, click **Parents, Students, Teachers, or Admin**, depending on which type of user report you want to generate.
5. At the bottom of the page, click **Generate Report**.
CHAPTER 16

Classroom Supplies List

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TeacherLists is a service your school can choose to integrate with PlusPortals. Using TeacherLists, administrators and teachers can upload classroom supplies lists that contain direct links to predefined retailers.

When you log on to PlusPortals, you're prompted to activate the TeacherLists integration. (See "Activate TeacherLists Integration" on page 170.)

After integration is complete, when logging in, teachers are prompted to upload their classroom supplies lists, while students and parents are directed to the TeacherLists Classroom Supplies List page. Teachers can upload multiple classroom supplies lists using almost any file format. They can edit or delete their lists as required. Students and parents can view classroom supplies lists, print them, and/or place orders by clicking a retailer.

**Important:** Because parents and students are directed to the TeacherLists Classroom Supplies List page once you've activated the integration, we recommend uploading your supplies lists prior to integration.

You can also add a link to the to the PlusPortals Home page that directs users to the TeacherLists Classroom Supplies List page. (See "Add a TeacherLists Link to the PlusPortals Home Page" on page 172.)
16.2 Activate TeacherLists Integration

At log in, you're prompted to activate the TeacherLists integration using the following steps:

**Important:** Because parents and students are directed to the TeacherLists Classroom Supplies List page once you've activated the integration, we recommend uploading your supplies lists prior to integration.

1. Click the link in the **TeacherLists Notification** dialog box.

   ![TeacherLists Notification dialog box]

   **Note:** You can also access the TeacherLists integration settings by clicking **Setup > Integrations** on the navigation bar and scrolling down to the **TeacherLists Integration** panel.

2. On the **TeacherLists Integration** panel, select the **Enable TeacherLists Integration** check box to enable the following TeacherLists features:

   - TeacherLists Classroom Supplies List page
   - Log-in prompt for teachers to create their classroom supplies lists
   - Log-in prompts for parents and students to visit the TeacherLists Classroom Supplies List
   - TeacherLists link on the PlusPortals User menu

3. Select the **Show TeacherLists button on the login page** check box to enable the TeacherLists link that displays on the Login page.

   **Important:** To select this check box you must first select the **Enable TeacherLists Integration** check box.

4. Optional: In **Summary Information**, create a message that displays on the TeacherLists Classroom Supplies Lists page and the PlusPortals Home page (if enabled).

   **Note:** When enabled, this message also displays on the enhanced Login (Home) page. (See "Add a TeacherLists Link to the PlusPortals Home Page " on page 172 for details.)
5. Click **Save**.

At log in, teachers are now prompted to upload their classroom supplies lists while students and parents are prompted to visit the TeacherLists Classroom Supplies Lists page.
16.3 Add a TeacherLists Link to the PlusPortals Home Page

On the enhanced Login (Home) page, you can add a link to the TeacherLists Classroom Supplies Lists page and display the summary you created when you activated the integration. (For details, see “Activate TeacherLists Integration” on page 170.)

Follow these steps to add the link and summary:

1. On the navigation bar, click Miscellaneous > Appearance > PlusPortals Home Page.

2. Under Select the content boxes which you want to show in your Home screen, select the TeacherLists check box.

3. Click Apply Changes.

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![Image of PlusPortals Home Page setup](image-url)
For details on uploading classroom supplies lists to your school’s TeacherLists Classroom Supplies Lists page, visit https://www.teacherlists.com.

**Important:** Because parents and students are directed to the TeacherLists Classroom Supplies List page once you’ve activated the integration, we recommend uploading your supplies lists prior to integration.
CHAPTER 17

New Year Transition

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17.1 New Year Transition Mode

New Year Transition Mode hides new year scheduling information from students, parents, and teachers until schedules are finalized while still allowing them to access PlusPortals. This feature ensures uninterrupted communication of events and announcements during your transition to the new year.

When New Year Transition Mode is enabled:

- The Homeroom field on the student and parent Demographics tabs is still visible.

**Note:** To hide the Homeroom field, follow these steps:

- Click Permissions, and then click Students. Scroll down to Demographics, clear the Homeroom check box, and then click Save Settings.

- Click Permissions, and then click Parents. Scroll down to Demographics, clear the Homeroom check box, and then click Save Settings.

- Scheduling information is hidden from admin users logging in as a student or parent, mirroring what students or parents see when they log in.

**Note:** You can log in as a student or parent by clicking next to a user on the Students or Parents tab of the Manage Accounts page.

- Teachers can still view their students’ current scheduling information on the Students tab.

- Group heads can still view group members’ current scheduling information in their student details.

To enable new year transition mode, see "Hide New Year Scheduling Information from User Groups" on page 176.
17.2 Hide New Year Scheduling Information from User Groups

You can hide new year scheduling information from student, parent, and/or teacher user groups while still allowing them to access PlusPortals. For more information, see "New Year Transition Mode" on page 175.

1. On the navigation bar, click **Manage Accounts**.

2. Click **Settings**.

3. Scroll down to **New Year Transition Mode**.

![New Year Transition Mode](image)

4. To hide new year scheduling information from a user group, set the corresponding toggle to **Yes**.

5. At the bottom of the **Settings** tab, click **Save**.