ProgressBook ParentAccess Administration Guide

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(This document is current for v15.1.0 or later.)

Change Log

The following Change Log explains by Product Version, Heading, Page and Reason where changes in the *ProgressBook ParentAccess Administration Guide* have been made.

Product Version	Heading	Page	Reason
15.1.0	*"Set Page Level Security"*	6	Updated screen shot to reflect new **View Notes** subitem of the **Student Profile** menu item.
15.0.0	*"Set Page Level Security"*	6	Updated screen shot to reflect new menu items and subitems as well as overall page redesign.
15.0.0	*"Maintain Registration Keys"*	43	Updated procedures required to generate, look up, and delete registration keys. Updated screen shots to reflect new user interface.
15.0.0	*"Generate Registration Keys by School"*	43	Updated section title and revised steps to reflect updated registration key generation procedure.
15.0.0	*"Delete Registration Keys by School"*	50	Updated section title and revised steps to reflect updated registration key deletion procedure.
15.0.0	*"Maintain ParentAccess Accounts"*	55	Added optional steps to export user information.
14.7.0	*"Set Page Level Security"*	6	Updated screen shot to show that you can now select or deselect **Student Home** for the **Student** role.
14.7.0	*"Maintain ParentAccess Accounts"*	55	Updated text and screen shots with revised field names and column headers that are now consistent with the **ProgressBook Sign In** screen.
			Added **User Name** as one of the user profile items that you can update. Revised screen shot of **Update User** window **Profile** tab to include **User Name** field.
14.6.0	*"Maintain Registration Keys"*	43	Updated images of **Registration Key Maintenance** screen to show new **Accounts** column and updated wording to reflect new rules for key creation.
14.5.0	*"Maintain District Settings"*	3	Added description of new **Enable Password Change?** section.
14.5.0	*"Set Page Level Security"*	6	Updated image of **Page Level Security** screen to show new **Student Homework Planner**, **Student Activities** and **Submit Student Activity** options and the removal of the **Student Homework** and **Student Assignments** options.
			Updated image of **Manage Students** screen to show new ProgressBook branding.
14.5.0	*"Set Up District Greeting Page"*	17	Updated images to reflect new ProgressBook branding.
14.5.0	*"Update District Greeting Page"*	20	Updated image to reflect new ProgressBook branding.
14.5.0	*"Enable Public Calendar"*	22	Updated image of **Sign In** screen to reflect new ProgressBook branding.
14.5.0	*"Generate Registration Keys by School"*	43	Updated procedure and image to reflect new **Parent Keys** drop-down list.

Product Version	Heading	Page	Reason
14.5.0	*"Generate Individual Registration Keys"*	45	Updated images to reflect new **Parent Keys** drop-down list.
14.5.0	*"Generate Additional Parent Registration Keys"*	47	Updated image to reflect new **Parent Keys** drop-down list.
14.5.0	*"Look Up Registration Keys"*	49	Updated images to reflect new **Parent Keys** drop-down list.
14.5.0	*"Delete Registration Keys by School"*	50	Updated image to reflect new **Parent Keys** drop-down list.
14.5.0	*"Delete Individual Registration Keys"*	51	Updated images to reflect new **Parent Keys** drop-down list.
14.5.0	*"Maintain ParentAccess Accounts"*	55	Added information about resetting passwords and updated images of the **Update User** window to show the new **Profile** and **Password** tabs.
14.2.0	*"Maintain Registration Keys"*	43	Added information about the new registration key formats. Updated screen shots to reflect changes to the user interface.
14.2.0	*"Generate Additional Parent Registration Keys"*	47	Added section to explain how to generate additional parent registration keys for a group of students.
14.2.0	*"Delete Registration Keys by School"*	50	Added section to explain how to delete all unused parent and student registration keys.
14.2.0	*"Export Registration Keys"*	53	Added information about new **Filename** field and **Output single row per student** option.
14.2.0	*"Maintain ParentAccess Accounts"*	55	Added information to explain how to unlock an account that is locked due to too many failed login attempts.
14.1.1	Entire Guide	N/A	Made minor edits to optimize WebHelp layout.
14.1.1	*"Maintain District Settings"*	3	Updated screen shot and revised wording to clarify optional and required steps for completing text fields on the **District Setup** screen.
14.1.1	*"Maintain Registration Keys"*	43	Updated screen shots to show added **Date of Birth** column on **Registration Key Maintenance** results screen.

Table of Contents

About this Guide

The purpose of this guide is to assist you in setting up and maintaining ParentAccess.

If you have the GradeBook role of Master or School Administrator, you can access all of the features described in this guide. If you have a different role but have District or School Web Author privileges, only some of these features are available to you.

You perform all of the tasks in this guide from the **ParentAccess Administration** screen. To access this screen, click the **PA Admin** link at the top of your home screen.

ParentAccess Administration Screen

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District Setup

Use the **District Setup** area of the **ParentAccess Administration** screen to maintain the following items:

- **District settings** (such as the alias, logo and document upload options) – See *"Maintain District Settings."*

- **Page level security** – See *"Set Page Level Security."*

- **Event categories** – See *"Maintain Event Categories."*

- **Alerts** – See *"Maintain Alerts."*

Maintain District Settings

To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/District-Selection-Display

http://www.progressbook.com/Videos/PA/Enable-Disable-District

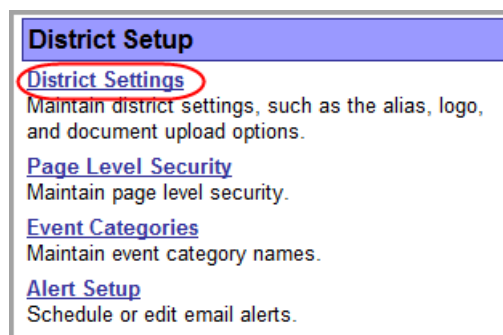http://www.progressbook.com/Videos/PA/File-Upload-Permissions

This topic explains how to maintain your district settings, including the alias, home page link and logo that appear in ParentAccess. It also explains how to enable/disable your district for ParentAccess, indicate file upload permissions for teachers and assign parent password reset privileges.

1. On the **ParentAccess Administration** screen, under **District Setup**, click **District Settings**.

District Setup

District Settings
Maintain district settings, such as the alias, logo, and document upload options.

Page Level Security
Maintain page level security.

Event Categories
Maintain event category names.

Alert Setup
Schedule or edit email alerts.

District Settings Option

The **District Setup** screen displays.

2. Optional: If you want to add a direct link from your school website to the ParentAccess **Sign In** screen (so users bypass the **District Selection** screen), use the **Direct link to login** URL.

3. Optional: In the **District Alias** field, enter the name of your school district as you want it to appear on the **Districts** screen and on the ParentAccess banner.

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4. In the **District Home Page** field, replace the default value with the URL of the district website where you want to direct ParentAccess users when they click the district alias on the ParentAccess banner.

5. Optional: If you want a logo to appear on the **Districts** screen, in the **Logo File Name** field, type the file name of the logo. A logo **Preview** displays to confirm that you have completed this field correctly.

6. For the **Enable this District?** option, select **Yes** to enable ParentAccess for the district or **No** to disable it.

    Note: Regardless of your selection, principals, teachers and guidance counselors can still view ParentAccess within the GradeBook application. To disable ParentAccess within the GradeBook application, refer to ProgressBook GradeBook System Manager Guide*.*

7. For the **Allow teachers to upload images?** option, select **Yes** to allow teachers to upload images to ParentAccess or **No** to not allow this.

8. For the **Allow teachers to upload documents?** option, select **Yes** to allow teachers to upload documents to ParentAccess or **No** to not allow this.

    Note: The size and number of files that teachers can upload to ParentAccess depend on the available space on the server. The default file size is 500 MB per each file, but you can modify this setting in the appSettings.config file. The default file size applies to all files uploaded by all districts that use that server.

9. In the **Enable Password Change?** section, select the check box beside each school for which you want to allow users with Clerk, Principal and School Support roles to reset parent passwords. To select all schools, select the check box in the header.

    *Note: Master and School Administrator roles can change parent passwords at their assigned schools regardless of this setting. In addition, all users with access to the **ParentAccess Account Maintenance** screen can change student passwords. (See "Maintain ParentAccess Accounts.")*

10. Click **Save**.

District Setup Screen

Set Page Level Security

This topic explains how to allow or deny access to specific screens or options in ParentAccess based on whether the user is a GradeBook user (teacher, principal or guidance counselor), parent or student.

1. On the **ParentAccess Administration** screen, under **District Setup**, click **Page Level Security**.

District Setup

District Settings
Maintain district settings, such as the alias, logo, and document upload options.

Page Level Security
Maintain page level security.

Event Categories
Maintain event category names.

Alert Setup
Schedule or edit email alerts.
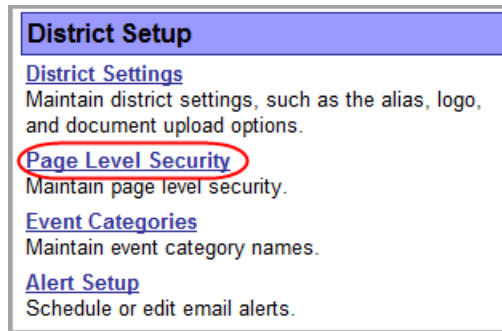
Page Level Security Option

The **Page Level Security** screen displays. You can set the security access for any screen or option for roles that are not grayed out.

Note: If a menu item has any subitems, each subitem controls specific functionality for the related screen. You can select a main menu item without enabling any of its subitems; for instance, you may want to give users limited or read-only access to a screen. If you enable a subitem to provide users with additional privileges, by default, the main menu item is automatically selected.

2. For each ParentAccess screen or option to which you want to grant access for a particular security role, select the check box beside the role (**GradeBook**, **Parent** and/or **Student**).

3. For each ParentAccess screen or option to which you want to deny access for a particular security role, deselect the check box beside the role.

4. Click **Save**.

Page Level Security Screen

Maintain Event Categories

Event categories provide a way to group events on the ParentAccess calendar for all the schools in a district. Default event categories are included in GradeBook, but you can also create your own.

- For information on setting up event categories, see *"Set Up Event Categories."*
- For information on updating or deleting event categories, see *"Update or Delete Event Categories."*

Set Up Event Categories

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Set-Up-Event-Categories

1. On the **ParentAccess Administration** screen, under **District Setup**, click **Event Categories**.

Event Categories Option

The **Event Category Maintenance** screen displays.

Event Category Maintenance Screen

2. In the **Category Name** column, type an event name in the first blank row.

3. Click **Save**.

Update or Delete Event Categories

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Update-Event-Categories

> ***Note:*** *You cannot delete event categories if any events are associated with them.*
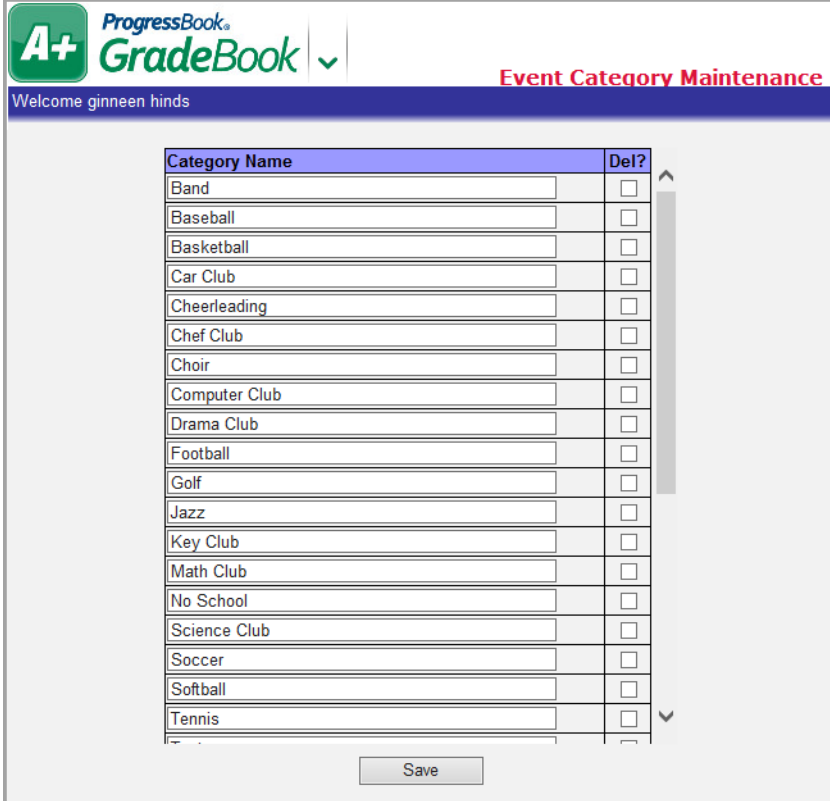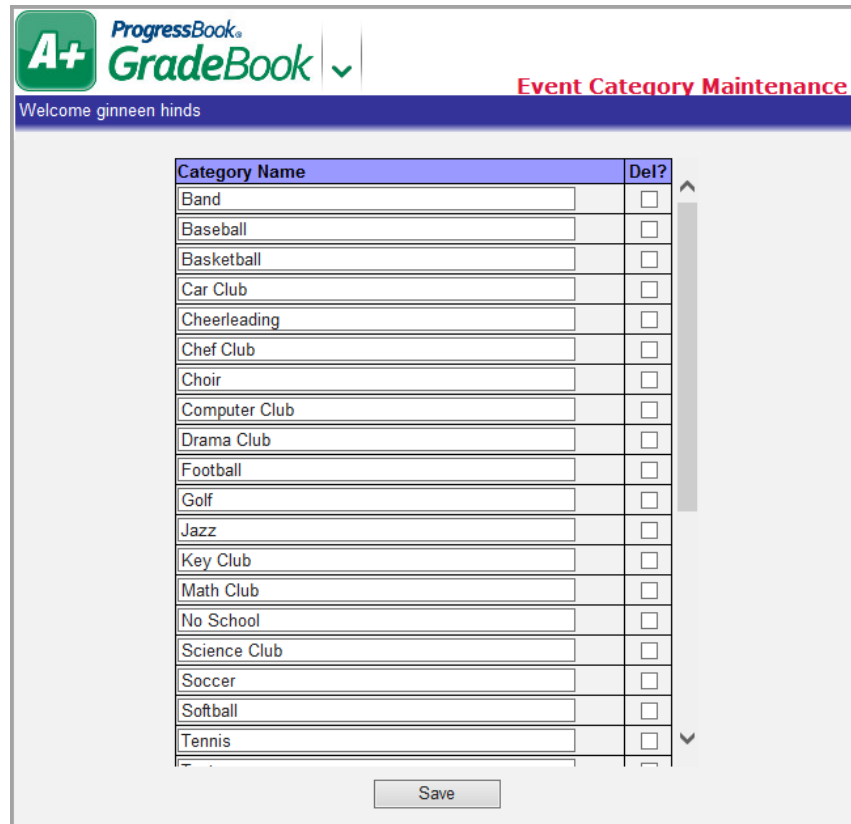
1. On the **ParentAccess Administration** screen, under **District Setup**, click **Event Categories**.
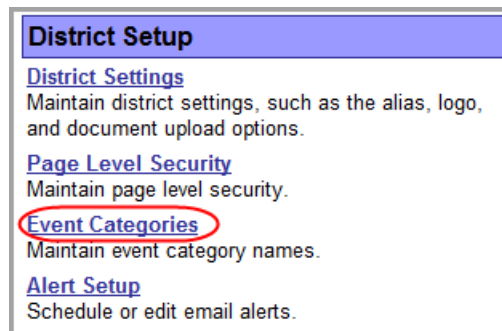
Event Categories Option

The **Event Category Maintenance** screen displays.

Event Category Maintenance Screen

2. Make any updates or deletions to the list as follows:

   - To update an event category name, in the **Category Name** column, change the name.
   - To delete an event category, in the **Del?** column, select the check box for the event.

3. Click **Save**.

Maintain Alerts

Alerts notify parents when their child has not completed an assignment or has received a low mark. You can schedule alerts to be sent all at once, or you can schedule specific alerts to be sent only from selected schools at specified intervals and times. For example, the high school may send missing assignment and low mark alerts daily at 3:00 pm, but the elementary schools send only missing assignment alerts weekly on Mondays at 7:00 am.

- For information on how alerts are processed, see *"Understand Alert Processing Requirements."*
- For information on setting up alerts, see *"Set Up Alerts."*
- For information on running alerts, see *"Run Alerts."*
- For information on updating or deleting alerts, see *"Update or Delete Alerts."*

Understand Alert Processing Requirements

All Alerts

GradeBook sends out each alert type (missing assignment alert or low assignment mark alert) only once for a specific assignment. You must have the alert type selected for a specific school, and it must be active.

Missing Assignment Alerts

GradeBook sends out a missing assignment alert only after a teacher marks the assignment as missing in GradeBook.

Low Mark Alerts

Only assignments that meet the following criteria are able to generate alerts:

- Used in a class that does not use the Custom Setup 2 grading scale
- Possible points more than 0
- Included in the student's average
- Marks posted to the web
- Due date on or after the date the parent or student subscribed to alerts

GradeBook sends low assignment mark alerts for assignments with a grade equal to or lower than a specific threshold set by the parent. The comparison uses numeric value equivalents, as shown in the following examples.

> **Letter grade example:**
> A teacher gives a "C" (numeric value equivalent=2) for a classwork assignment. If a parent has subscribed to low assignment mark alerts and selected "B" (numeric value equivalent=3) as the threshold, GradeBook sends the parent a low assignment mark alert.

Points/percentage example:
A teacher gives 7 points for a homework assignment that is worth 10 points (percentage=70%). According to the range in the grading scale, this score is equivalent to a "C" (numeric value equivalent=2). If a parent has subscribed to low assignment mark alerts and selected "B" (numeric value equivalent=3) as the threshold, GradeBook sends the parent a low assignment mark alert.

Set Up Alerts

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Set-Up-Alerts
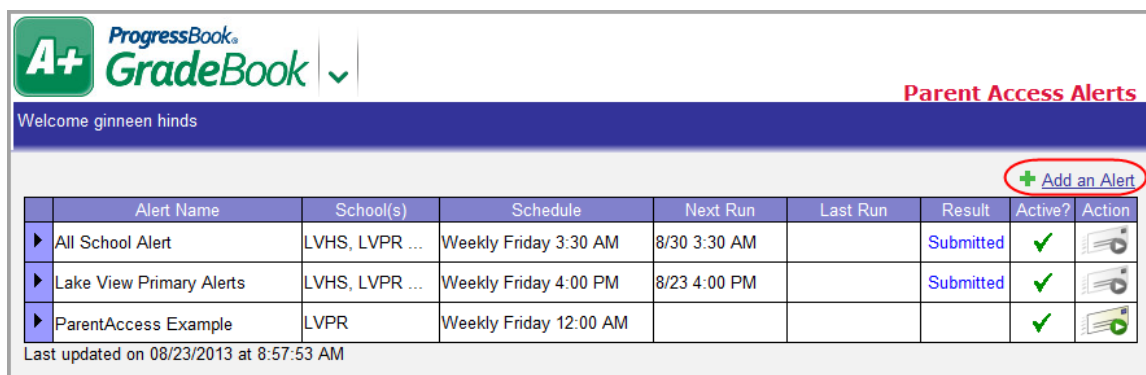
1. On the **ParentAccess Administration** screen, under **District Setup**, click **Alert Setup**.
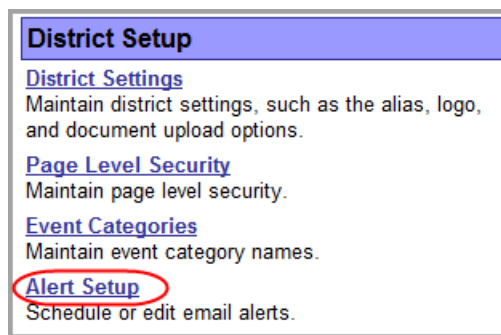
Alert Setup Option

The **Parent Access Alerts** screen displays

Add an Alert

2. Click **Add an Alert**.

3. On the **Add Alert** window, enter an **Alert Name**.

4. In the **Alert Type(s)** area, select if this alert is for **Missing Assignments** and/or **Low Assignment Marks**.

5. Select a **Run Frequency** for the alert:

   - **Daily** – To send the alert every day at a specified time
   - **Weekly** – To send the alert weekly on a specified day and time
   - **Manual** – To send the alert only when the GradeBook system manager runs it manually

6. If you selected **Daily** or **Weekly** in *step 5*, select a **Run Time** at which to send the alert.

7. If you selected **Weekly** in *step 5*, select a **Run Day** on which to send the alert.

8. Select the **Active?** check box.

9. In the **Select the schools that will use this alert** area, select the individual school(s) or **All Schools**.

Add Alert Window

10. Click **Save**, and close the window.

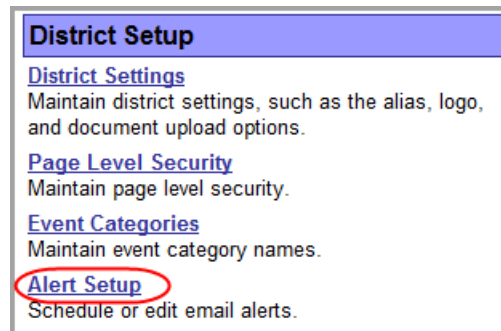11. Run the alert at least once manually. (See *"Run Alerts."*)

Run Alerts

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Run-Alerts

You can run an alert manually at any time even if it is previously scheduled.

1. On the **ParentAccess Administration** screen, under **District Setup**, click **Alert Setup**.

Alert Setup Option

The **Parent Access Alerts** screen displays. In the **Action** column, an alert is available to run if [icon] displays in color (not grayed out).
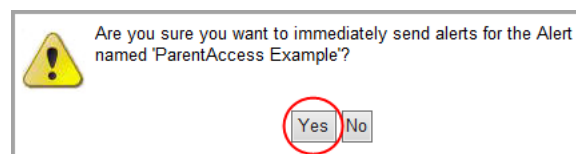

Run an Alert

2. In the row of the alert you want to run, click [icon].

3. On the window that opens, click **Yes** to confirm that you want to run the alert now.

Run Alert Confirmation Window

The alert runs and displays a status of "Submitted" in the **Result** column.

Submitted Alert

As the alert cycles through the following stages, the alert status in the **Result** column changes.

Alert Status with Description

Event	Status	Description
User clicks .	Submitted	The Alert Service has received the request to run.
The previously scheduled time has already occurred or user clicks .	In Progress	The alert is being processed for each school building. This could take several minutes depending on the number of buildings.
The alert has processed.	Completed	The alert has processed successfully for all school buildings.
The alert has not processed.	Failed	The alert has not processed successfully for all school buildings.

Update or Delete Alerts

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Update-Alerts

You can update alerts at any time.

1. On the **ParentAccess Administration** screen, under **District Setup**, click **Alert Setup**.

Alert Setup Option

The **Parent Access Alerts** screen displays.

Update an Alert

2. In the row of the alert you want to update, click ▶ .

3. On the **Alert Maintenance** window, do the following:

    - To update an alert, make any desired changes, and then click **Save**.
    - To delete an alert, click **Delete**, and on the delete confirmation window, click **Yes**.

Alert Maintenance Window

Manage Website Content

Use the **Manage Website Content** area of the **ParentAccess Administration** screen to maintain the following items:

- **District greeting** – See *"Maintain District Greeting Page."*
- **Public calendar** – See *"Enable Public Calendar."*
- **News and information** – See *"Maintain News and Information."*
- **District and school events** – See *"Maintain Events."*
- **District and school forms** – See *"Maintain Forms."*

Maintain District Greeting Page

If you choose to enable a district greeting page, ParentAccess users see the district greeting page instead of the standard **Sign In** screen when signing in.

- For information on setting up a district greeting page, see *"Set Up District Greeting Page."*
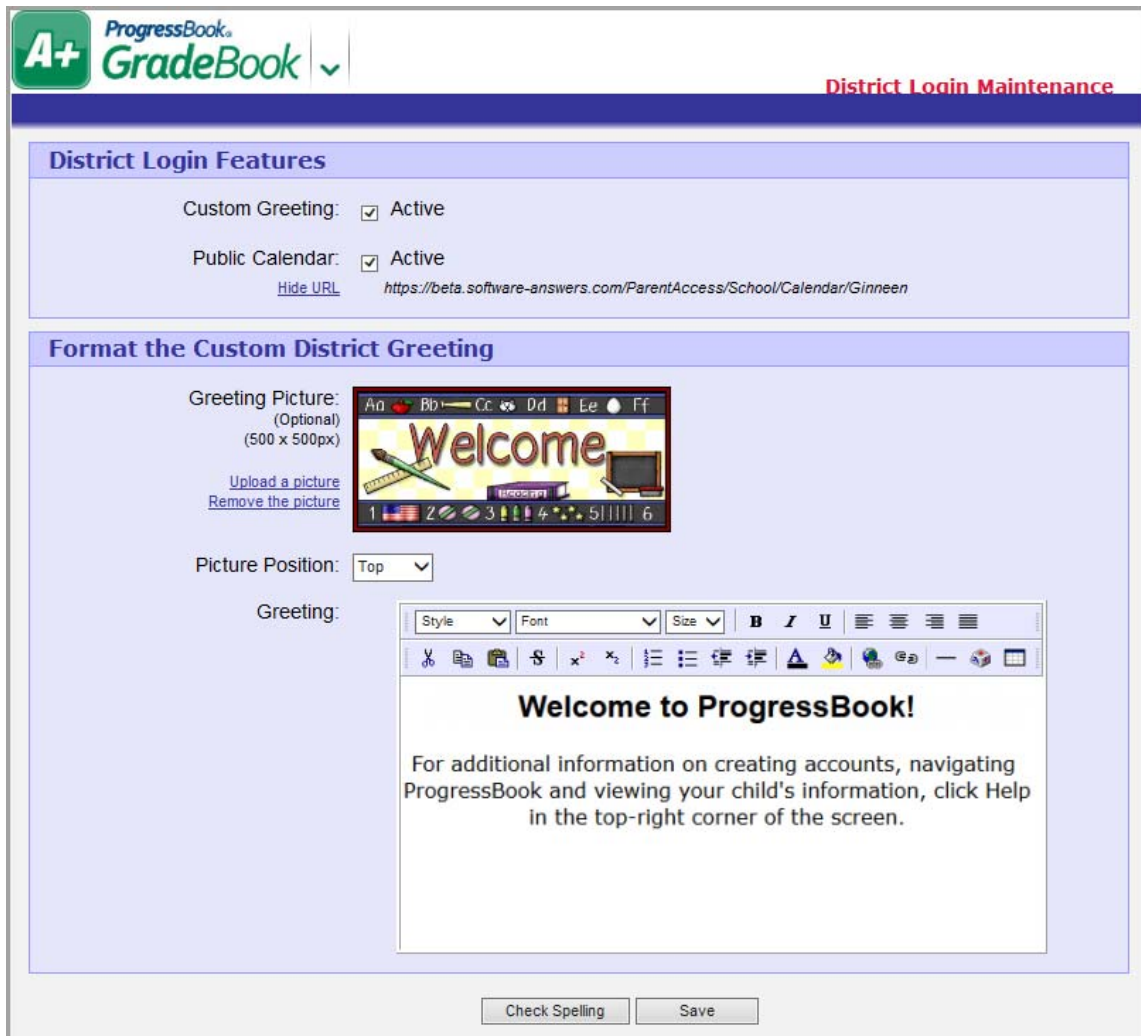- For information on updating a district greeting page, see *"Update District Greeting Page."*

Set Up District Greeting Page

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District Login Maintenance**.
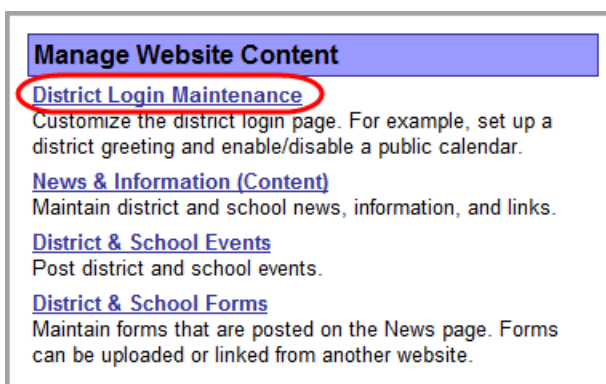
District Login Maintenance Option

The **District Login Maintenance** screen displays.

District Login Maintenance Screen

2. Select the **Active** check box beside **Custom Greeting**.

3. In the **Format the Custom District Greeting** area, enter the greeting that you want to appear for ParentAccess users on their **Sign In** screen.

4. Optional: To check the spelling of your greeting text, at the bottom of the screen, click **Check Spelling**.

5. Optional: If you want an image to appear on the district greeting screen, do the following:

    a. Click the link that reads **Upload a picture**.

        The **File Upload Utility** window displays.
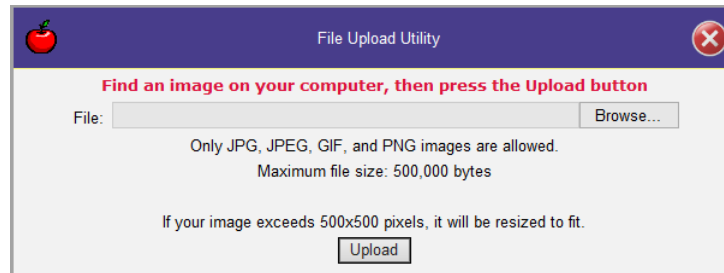
File Upload Utility Window

    b. Click **Browse**, and browse to and select the image file.

    c. Click **Upload**.

    d. In the drop-down list that says **Display the picture on the...**, select where on the district greeting screen you want the image to display ("Left," "Right," "Top" or "Bottom").

6. Click **Save**.

    Your district greeting now appears to ParentAccess users on their **Sign In** screen.
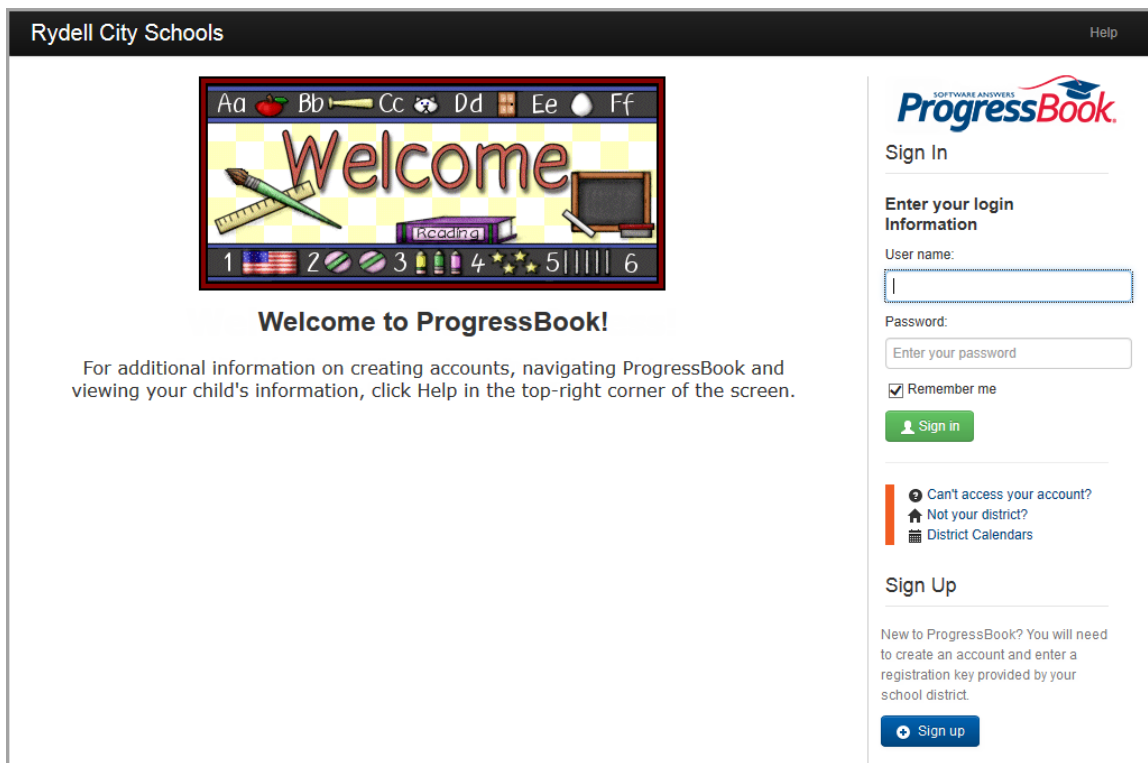
ParentAccess Sign In Screen with District Greeting Enabled

Update District Greeting Page

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District Login Maintenance**.

District Login Maintenance Option

The **District Login Maintenance** screen displays.

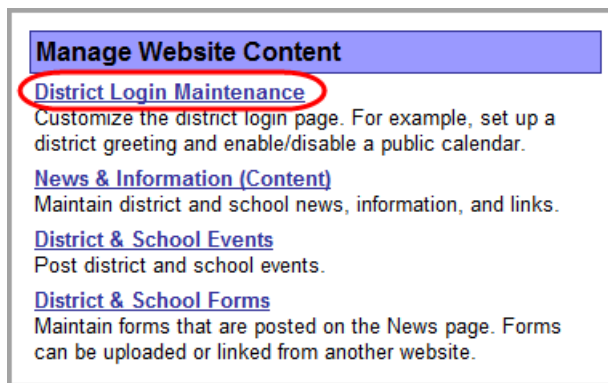**District Login Maintenance Screen**

2. Make any updates as follows:

    •   To disable the district greeting screen, deselect the **Active** check box beside **Custom Greeting**.

    •   To update the greeting text, in the **Format the Custom District Greeting** area, make any needed updates.

    •   To remove an image, click the link that reads **Remove the picture**.

3. Click **Save**.
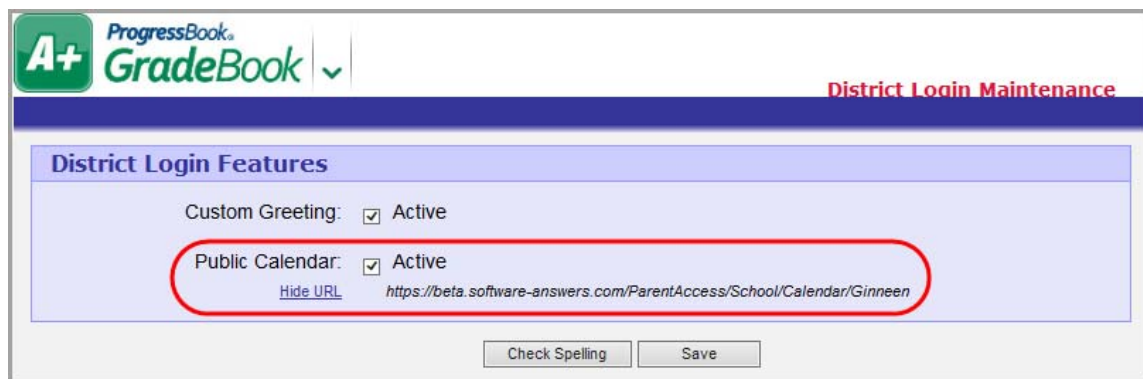
Enable Public Calendar

You can enable access to a public calendar that does not require viewers to be registered ParentAccess users. The public calendar displays events that are of interest to the school community in general, so any interested community member can click the link to view the calendar and is not required to sign in to ParentAccess.

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District Login Maintenance**.
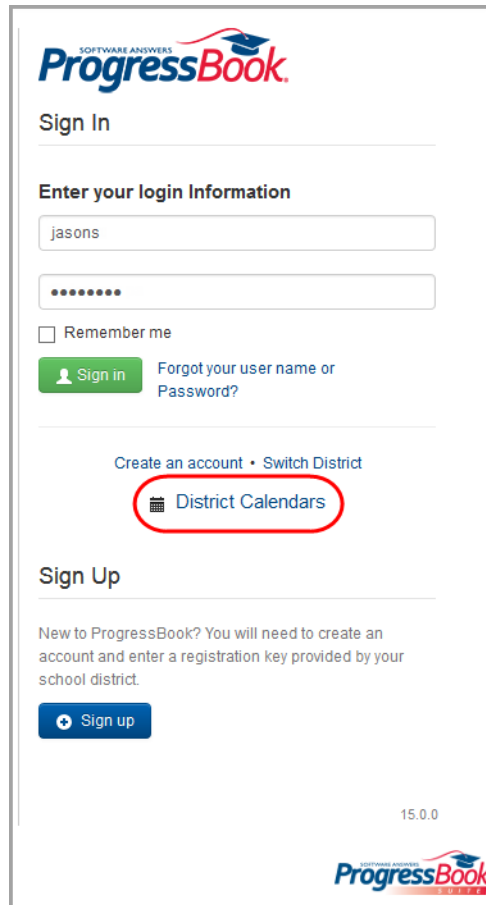

District Login Maintenance Option

The **District Login Maintenance** screen displays.

District Login Maintenance Screen (District Login Features)

2. Select the **Active** check box beside **Public Calendar**.
3. Click **Save**.

The **District Calendars** link now displays on the ParentAccess **Sign In** screen.

**District Calendars Link on
Sign In Screen**

4. Optional: If you want to provide a direct link from your school or district website to the public calendar, do the following:

   a. Click **Show URL.**

   The calendar's web address displays.

   b. Use the web address to create the link on your school or district website.

Maintain News and Information

You can post news articles, documents and web links for ParentAccess users. These appear on the **News** screen in ParentAccess in either the main **News** area or under **Information** or **Links**.

> *Note: To post a document to appear in the **Forms** area of the **News** screen in ParentAccess, see "Post Forms."*

- For information on posting news, see *"Post News and Information."*
- For information on updating news, see *"Update News and Information."*

Post News and Information

To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/Post-News-Article

http://www.progressbook.com/Videos/PA/Post-Document

http://www.progressbook.com/Videos/PA/Post-Link

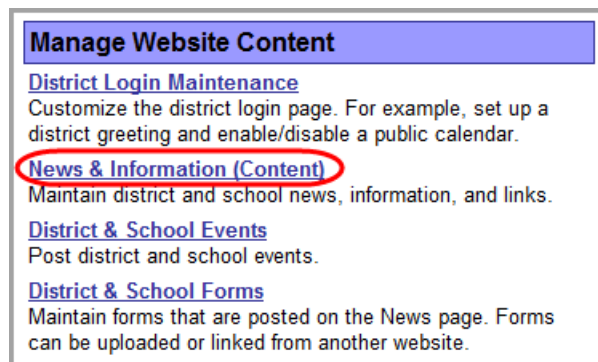http://www.progressbook.com/Videos/PA/Upload-Images

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **News & Information (Content)**.

News & Information (Content) Option

The **Content Search** screen displays.

Content Search Screen

2. Click **Add New Content**.

   The **Content Maintenance** screen displays.

Content Maintenance Screen - Format the News Content

3. In the **Format the News Content** area, in the **Enter a Title** field, enter a title for the news item.

4. In the **Status** field, select the **Active** check box.

5. In the **Date Range** fields, enter the start and end dates during which this news item should display. (You can also select dates from the calendar date picker.)

6. For **Display Section**, select where in ParentAccess you want this news item to display ("News Section," "Info Section" or "Links Section").

    *Note: An image of the ParentAccess **News** screen appears as a guide to the screen's layout.*

7. In the **Sort Order** field, enter a number to indicate the order in which you want the news item to display in ParentAccess.

    Note: It is a good idea to leave space between the numbers (for example, use increments of 10) so you can insert items between others later if needed.

8. In the **Select the schools which will display this item** area at the bottom of the screen, select one or more schools that should display the news item on their **News** screen in ParentAccess. (To select all of the schools, click **Select All**.)

Content Maintenance Screen - Select the Schools Which Will Display This Item

9. Return to the **Format the News Content** area at the top of the screen, and select the **Content Type** you are uploading ("News Article," "Document" or "Web Link"). Then follow the steps for that type of content listed below:

    - *"Post News Article"*
    - *"Post Document"*
    - *"Post Web Link"*

Post News Article

1. In the **Format the News Article** area in the middle of the screen, in the **Full Article** field, enter the text of the news article. You can use the options in the text editor to format the text.


Content Maintenance Screen - Format the News Article

2. Optional: If you want an image to display with the news article, do the following:

   a. Under **Article Picture**, click **Upload a picture**.

      The **File Upload Utility** window displays.
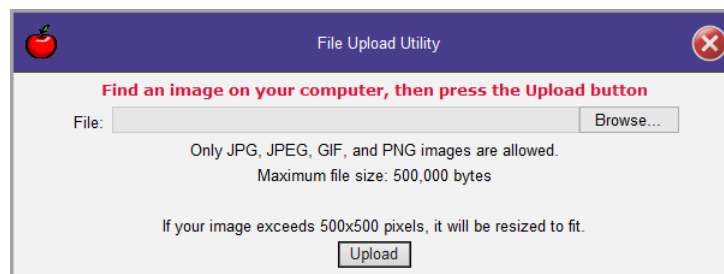

File Upload Utility Window

   b. Click **Browse**, and browse to and select the image file.

   c. Click **Upload**.

d. In the **Picture Position** drop-down list under the image you just uploaded, select where in relation to the news article text you want the image to display ("Left," "Right," "Top" or "Bottom").

3. Optional: If you would like to display only a summary of the news item with a button users can click to open the full news item, do the following:

a. In the **Format the News Content** area, select the **Include Summary** check box.

b. In the **Format the News Article** area, in the **Summary** field, enter the text that you want to display as a summary of the news article.

c. Optional: To include an image with the summary, do the following:

i. Under **Summary Picture**, click **Upload a picture**.
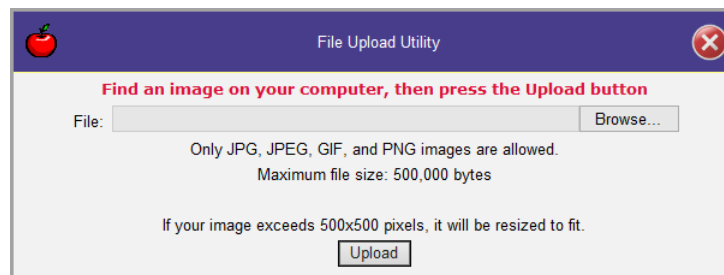
The **File Upload Utility** window displays.

File Upload Utility Window

ii. Click **Browse**, and browse to and select the image file.

iii. Click **Upload**.

iv. In the **Picture Position** drop-down list under the summary image you just uploaded, select where in relation to the summary text you want the image to display ("Left," "Right," "Top" or "Bottom").

d. Optional: To include an image with the full news article that displays in the window after users click the button to read more, do the following:

i. Under **Popup Picture**, click **Upload a picture**.

The **File Upload Utility** window displays.

File Upload Utility Window

ii. Click **Browse**, and browse to and select the image file.

iii. Click **Upload**.

iv. In the **Picture Position** drop-down list under the popup image you just uploaded, select where in relation to the text of the full news article you want the image to display ("Left" or "Right").

4. Optional: To check the spelling of all of your entries on this page, click **Check Spelling**.

5. Click **Save**.

Post Document

1. In the **Upload the Document** area in the middle of the screen, click **Upload a new form**.

Content Maintenance Screen - Upload the Document

The **File Upload Utility** window displays.

File Upload Utility Window

2. Click **Browse**, and browse to and select the document file.

3. Click **Upload**.

4. Optional: To include an image with the document, do the following:

   a. Under **Document Picture**, click **Upload a picture**.
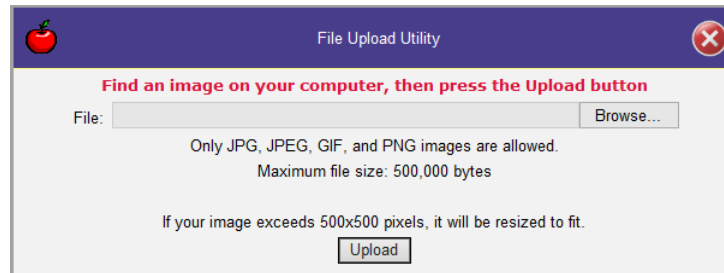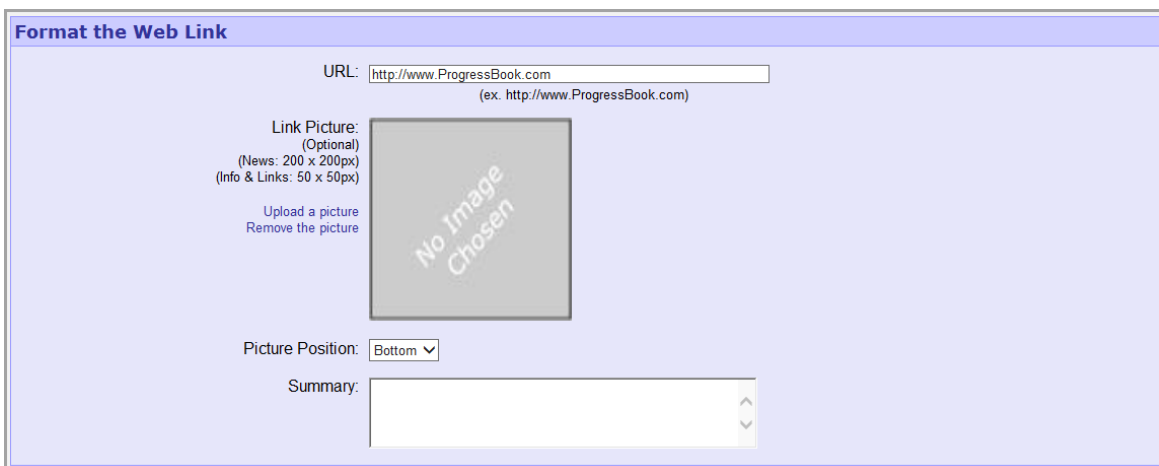
      The **File Upload Utility** window displays.

File Upload Utility Window

b. Click **Browse**, and browse to and select the image file.

c. Click **Upload**.

d. In the **Picture Position** drop-down list under the image you just uploaded, select where in relation to the document link you want the image to display ("Left," "Right," "Top" or "Bottom").

5. Optional: To display a summary description of the document, enter a description in the **Summary** field.

6. Optional: To check the spelling of all of your entries on this page, click **Check Spelling**.

7. Click **Save**.

Post Web Link

1. In the **Format the Web Link** area in the middle of the screen, in the **URL** field, enter the full URL (website address) of the web link, including ***http://*** (for example: http://www.progressbook.com).

Content Maintenance Screen - Format the Web Link

2. Optional: To include an image with the link, do the following:

a. Under **Link Picture**, click **Upload a picture**.

The **File Upload Utility** window displays.

File Upload Utility Window

   b. Click **Browse**, and browse to and select the image file.

   c. Click **Upload**.

   d. In the **Picture Position** drop-down list under the image you just uploaded, select where in relation to the web link you want the image to display ("Left," "Right," "Top" or "Bottom").

3. Optional: To display a summary description of the website to which you are linking, enter a description in the **Summary** field.

4. Optional: To check the spelling of all of your entries on this page, click **Check Spelling**.
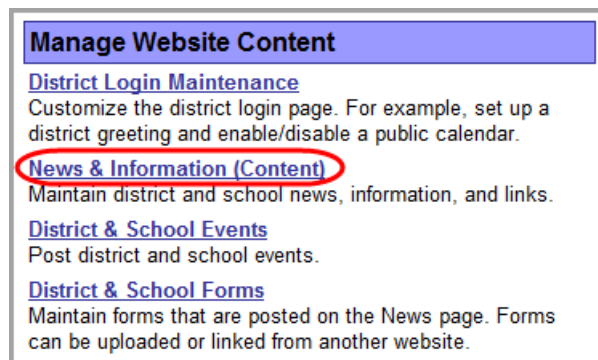
5. Click **Save**.

Update News and Information

To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/Search-News

http://www.progressbook.com/Videos/PA/Update-News

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **News & Information (Content)**.

News & Information (Content) Option

The **Content Search** screen displays.

Content Search Screen

2. Optional: If you do not see the news item you want to update, search for it by entering or selecting any known information in the **School**, **Start**, **End** and **Status** fields and/or by entering a partial or full word in the **Text** field, and then click **Search**.

A list of news items matching the search criteria you entered displays.

Content Search Screen – Refined Results

3. Make any needed updates to the news item as follows:

   • To change the order in which the news item displays in the list, update the **Seq#** field.

   • To modify the date range in which the news item should display, update the dates in the **Start Date** and **End Date** fields.

   • To change the status of the news item, select or deselect the **Active?** check box.

4. Click **Save**.

   • To update the news details, click ▶ , update any fields on the **Content Maintenance** screen, and click **Save**.

   *Note: To delete the news item, at the bottom of the screen click **Delete This Content**, and then click **Yes** on the **Delete Home Page Content** window.*

Maintain Events

You can post district and school events for ParentAccess users. These appear on the **Calendar** and **Event List** screens in ParentAccess.

- For information on posting events, see *"Post Events."*
- For information on updating events, see *"Update Events."*

Post Events

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Post-Events

> *Note: In order to post an event, an event category with which to associate the event must already exist.* See *"Maintain Event Categories."*

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District & School Events**.
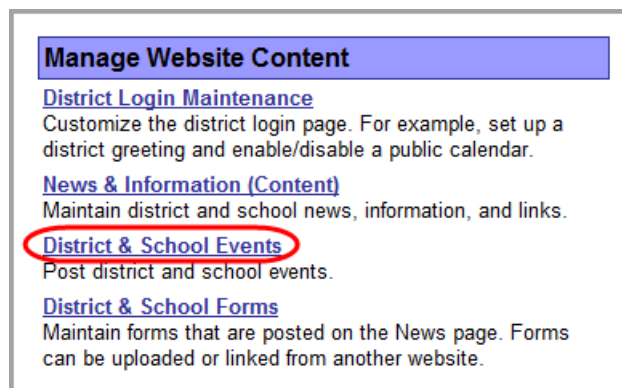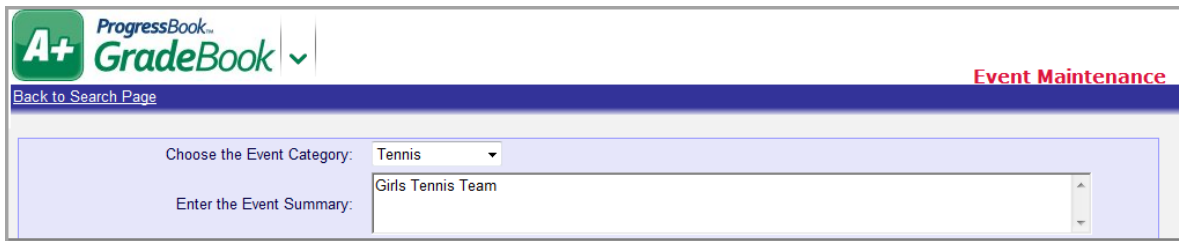

District & School Events Option

The **Event Search** screen displays.
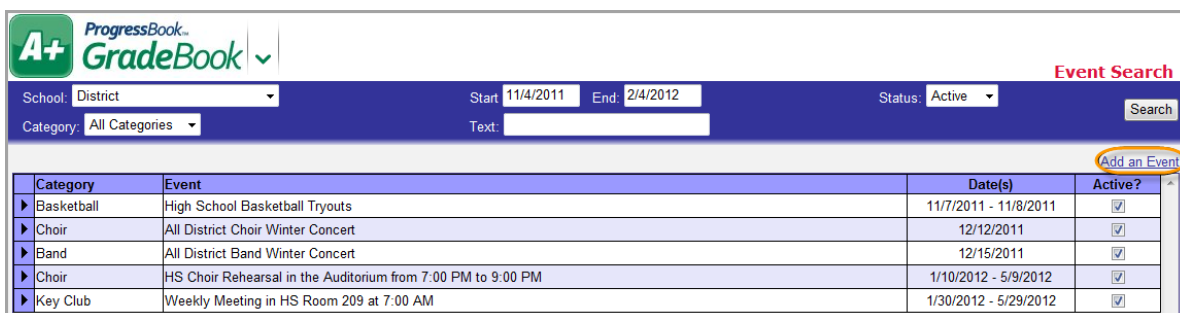
Event Search Screen

2.   Click **Add an Event**.

The **Event Maintenance** screen displays.

Event Maintenance Screen

3.   In the **Choose the Event Category** drop-down list, select the appropriate event category for the event you are posting.

4.   In the **Enter the Event Summary** field, enter the name and/or description of the event.

5.   In the **Date** field, enter the date on which the event will occur. You can also use the calendar date picker.

6.   If the event is not an all-day event, deselect the **All Day** check box, and select a **Start Time** and **End Time**.

Enter Dates on the Event Maintenance Screen

7.   If the event is a recurring event (for example: football games that occur every Friday between August and October), click **Add Recurring Dates**, and perform the following:

a.   On the **Add Recurring Days** window, in the **Enter the Start Date** field, enter or select the first date of the recurring event.

b.   In the **Enter the End Date** field, enter or select the last date of the recurring event.

c.   In the **Select the days of the week to schedule this event** options, select the day(s) of the week on which the event will occur.

d.   Optional: In the **Enter additional information for these days** field, enter more detailed information, if desired.

e.   Click **Add these dates**.

Add Recurring Days Window

8. Optional: Enter event details in the **Enter Additional Event Details** area. You can use the options in the text editor to format the text.

Enter Additional Event Details

9. Optional: If you want an image to appear with the event, do the following:

   a. In the **Display a picture with your event details** area, click the link that reads **Click here to upload a picture**.
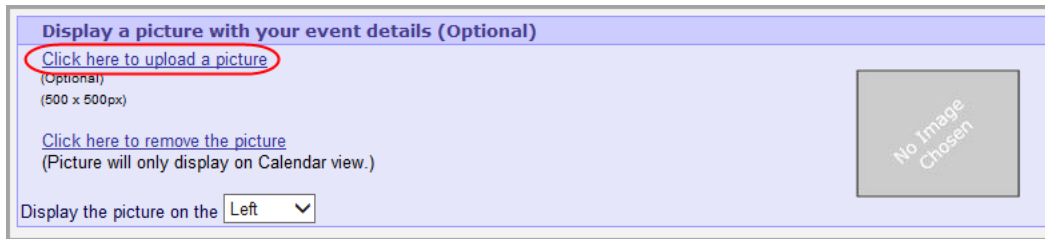
Upload a Picture

The **File Upload Utility** window displays.

File Upload Utility Window

b.   Click **Browse**, and browse to and select the image file.

c.   Click **Upload**.

d.   In the drop-down list that says **Display the picture on the...**, select where in relation to the event you want the image to display ("Left," "Right," "Top" or "Bottom").

10. In the **Select the schools which will display this event** area, select the schools that should display the event. (To select all of the schools, click **Select All**.)

11. Select the **Active** check box.

Select Schools to Display Event

12. Optional: To check the spelling of all of your entries on this page, click **Check Spelling**.

13. Click **Save**.

Update Events

To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/Search-Events

http://www.progressbook.com/Videos/PA/Update-Events

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District & School Events**.
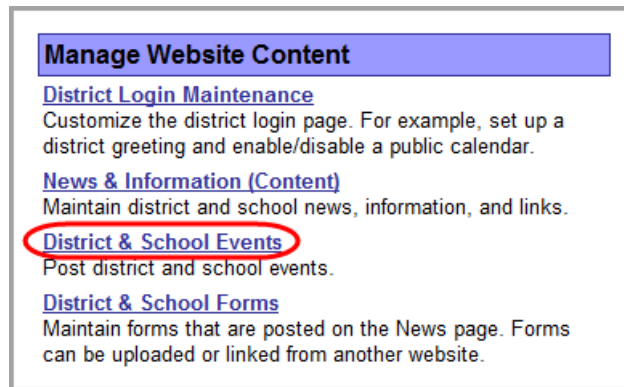
District & School Events Option

The **Event Search** screen displays.
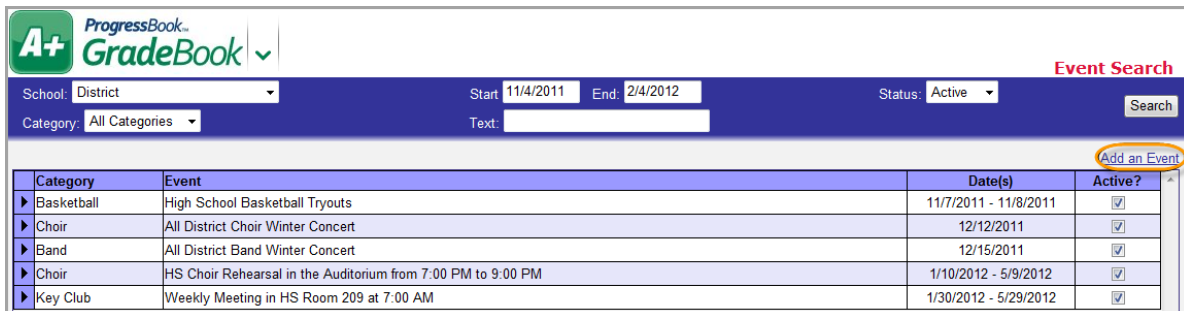
Event Search Screen

2. Optional: If you do not see the event you want to update, search for it by entering or selecting any known information in the **School**, **Start**, **End**, **Status** and **Category** fields and/or by entering a partial or full word in the **Text** field, and then click **Search**.

A list of events matching the search criteria you entered displays.
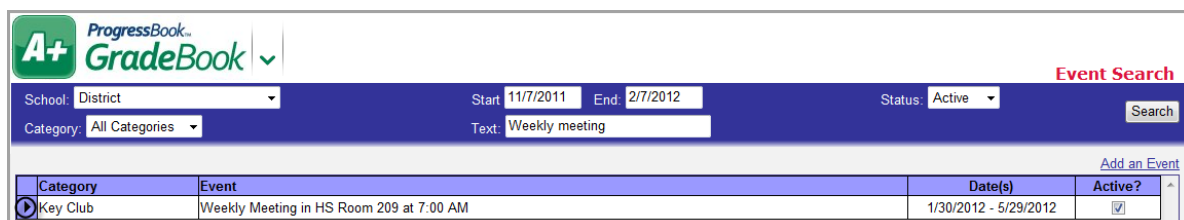
Event Search Screen – Refined Results

3. Make any needed updates to the event as follows:

    •   To change the status of the event, in the **Active?** column, select or deselect the check box, and then click **Save**.

    •   To update the event details, click [▶], update any fields on the **Event Maintenance** screen, and click **Save**.

    *Note: To delete the event, click **Delete This Event** at the bottom of the screen, and then click **Yes** on the **Delete an Event** window.*

Maintain Forms

You can post forms for ParentAccess users by uploading the forms or providing links to existing forms on other websites. These appear on the **News** screen in ParentAccess under **Forms**.

*Note: To post a document to appear in ParentAccess in either the main **News** area of the **News** screen or under **Information** or **Links**, see "Post News and Information."*

•   For information on posting forms, see *"Post Forms."*
•   For information on updating forms, see *"Update Forms."*

Post Forms

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Post-Forms

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District & School Forms**.

District & School Forms Option

The **Form Search** screen displays.

Form Search Screen

2. Click **Add a Form**.

The **Forms Maintenance** screen displays.

Forms Maintenance Screen

3. In the **Form Name** field, enter a name for the form.

4. In the **Description & Instructions** field, enter a description of the form.

5. In the **Setup Your Form** area, select one of the following options:

    *   To upload your own form, click the link that reads **Click here to upload a form**.

    *   To link to an existing form on another website, in the **Enter a URL to an existing form** field, enter the full URL (website address) of the form, including ***http://*** (for example: http://www.progressbook.com/Release-Notes.pdf).

6. Optional: If you want an icon to appear beside the link, do the following:

    a. Click the link that reads **Click here to upload an icon**.

    The **File Upload Utility** window displays.
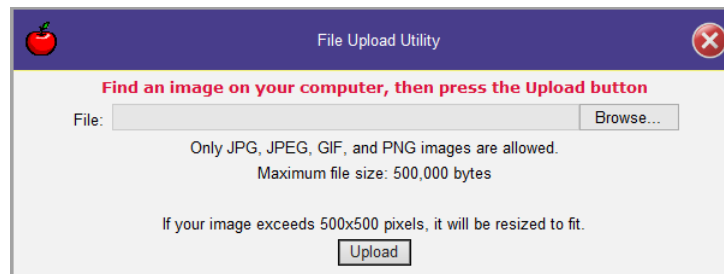
File Upload Utility Window

    b. Click **Browse**, and browse to and select the image file.

    c. Click **Upload**.

7. In the **Enter the date range to use when posting the form** area, enter the **Start** and **End** dates during which the link to this form should display. (You can also select dates from the calendar date picker.)

8. In the **Select the schools which will display this form** area, select one or more schools that should display the link to this form in ParentAccess on the **News** screen under **Forms**. (To select all of the schools, click **Select All**.)

9. In the **Status** field, select the **Active** check box.

10. Optional: To check the spelling of all of your entries on this page, click **Check Spelling**.

11. Click **Save**.

Update Forms

To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/Search-Forms

http://www.progressbook.com/Videos/PA/Update-Forms

1. On the **ParentAccess Administration** screen, under **Manage Website Content**, click **District & School Forms**.

District & School Forms Option

The **Form Search** screen displays.

Form Search Screen

2. Optional: If you do not see the form you want to update, search for it by entering or selecting any known information in the **School** and **Status** fields and/or by entering a partial or full word in the **Text** field, and then click **Search**.

A list of forms matching the search criteria you entered displays.

Form Search Screen – Refined Results

3. Make any needed updates to the form as follows:

-   To change the status of the form, in the **Active?** column, select or deselect the check box, and then click **Save**.

-   To update the form details, click ▶ , update any fields on the **Forms Maintenance** screen, and click **Save**.

    Note: *To delete the form, click* ***Delete This Form*** *at the bottom of the screen, and then click* ***Yes*** *on the* ***Delete a Form*** *window.*

Manage Accounts

Use the **Manage Accounts** area of the **ParentAccess Administration** screen to maintain the following items:

- **Registration keys** – See *"Maintain Registration Keys."*
- **ParentAccess accounts** – See *"Maintain ParentAccess Accounts."*

Maintain Registration Keys

ParentAccess users need a registration key to create their account. Parents use a distinct parent registration key for each of their children to create their own parent account in which they see all of their children's information. Students use a student registration key to create their own student account in which they see only their own information.

This topic explains how to perform the following tasks in GradeBook related to maintaining ParentAccess registration keys:

- *"Generate Registration Keys by School"*
- *"Generate Individual Registration Keys"*
- *"Generate Additional Parent Registration Keys"*
- *"Look Up Registration Keys"*
- *"Delete Registration Keys by School"*
- *"Delete Individual Registration Keys"*
- *"Export Registration Keys"* (for parent and/or student letters)

Generate Registration Keys by School

This procedure generates parent and student registration keys (based on school buildings you choose) for all active students without linked accounts and for whom keys do not already exist.

To generate parent and student registration keys for a single student, see *"Generate Individual Registration Keys."* To generate additional parent keys for a group of students, see *"Generate Additional Parent Registration Keys."*

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Generate-Keys

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.
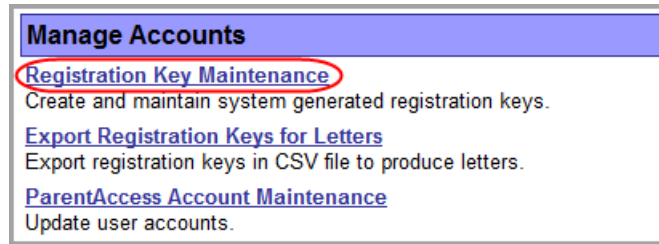
Registration Key Maintenance Option

The **Registration Key Maintenance** screen displays.

2. Click the **Generate New Keys** tab.
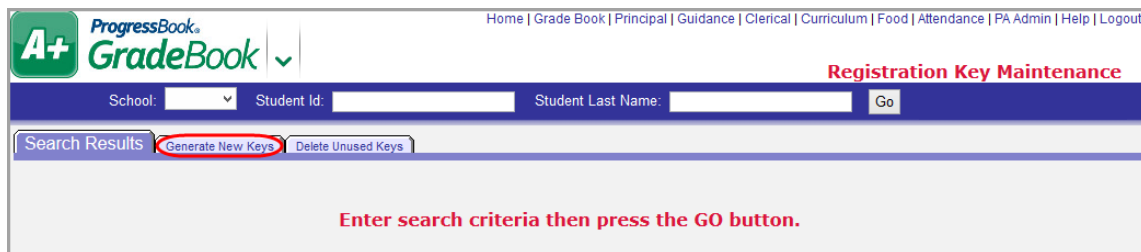
Generate New Keys Tab

3. Select the schools for which you want to generate registration keys, or select **All My Schools** to generate keys for all buildings to which you have access.

4. In the **Parent Keys** drop-down list, select the number of parent keys you want to generate for each student.

5. Click **Generate Registration Keys**.
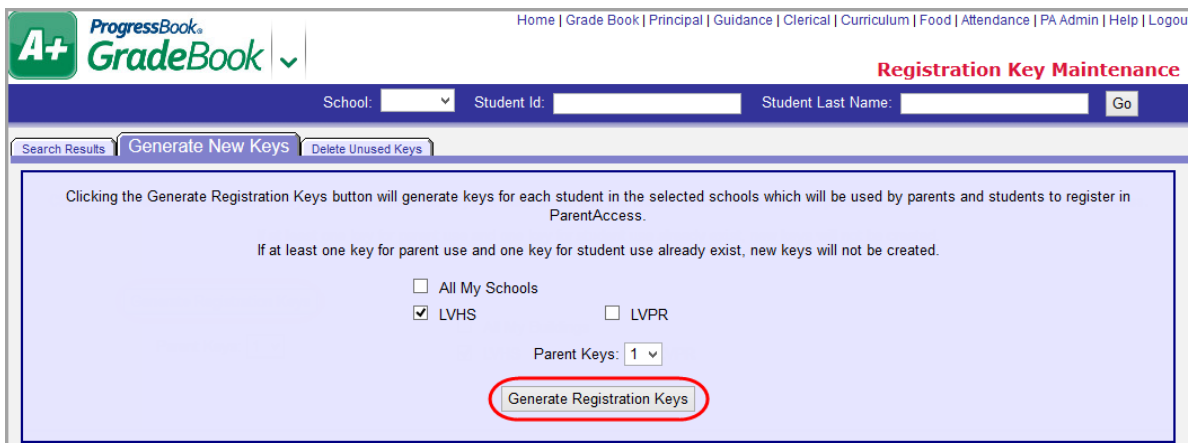
Generate Registration Keys

GradeBook generates keys for all active students in the selected school(s) without linked accounts and for whom keys do not already exist. Parent keys begin with the letters "PA" and student keys begin with "SA."

6. Optional: To see the generated keys, see *"Look Up Registration Keys."*

Generate Individual Registration Keys

This procedure generates parent and student registration keys for a single student.

To generate parent and student registration keys for all active students for whom keys do not already exist, see *"Generate Registration Keys by School."* To generate additional parent keys for a group of students, see *"Generate Additional Parent Registration Keys."*

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Generate-Individual-Key

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.

Registration Key Maintenance Option

The **Registration Key Maintenance** screen displays.

2. Search for the student by selecting the **School** the student attends and/or by entering a partial or full **Student Id** and/or **Student Last Name**, and then click **Go**.

Registration Key Maintenance Screen

A list of students matching the search criteria you entered displays.

3. Optional: To further filter the list of students by enrollment status, for the **Select Students** option, click **Active**, **Inactive** or **All**.

4. In the row of the student for which you want to generate an additional registration key, click [▶].

Registration Key Search – Refined Results

The **Student Key Information** window opens.

5. To add a parent registration key, click **Add a Key for Parent Use**. To add a student registration key, click **Add a Key for Student Use**.

Student Key Information Window

6. Click **Save**.

The **Student Key Information** window displays the newly created registration key(s)

**Newly Generated Keys on Student Key
Information Window**

Generate Additional Parent Registration Keys

This procedure generates additional parent registration keys for a group of students. Commonly, the students are from the same family, and you use this procedure to generate additional parent registration keys for a non-custodial parent or guardian.

To generate parent and student registration keys for all active students for whom keys do not already exist, see *"Generate Registration Keys by School."* To generate parent and student registration keys for a single student, see *"Generate Individual Registration Keys."*

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.

Registration Key Maintenance Option

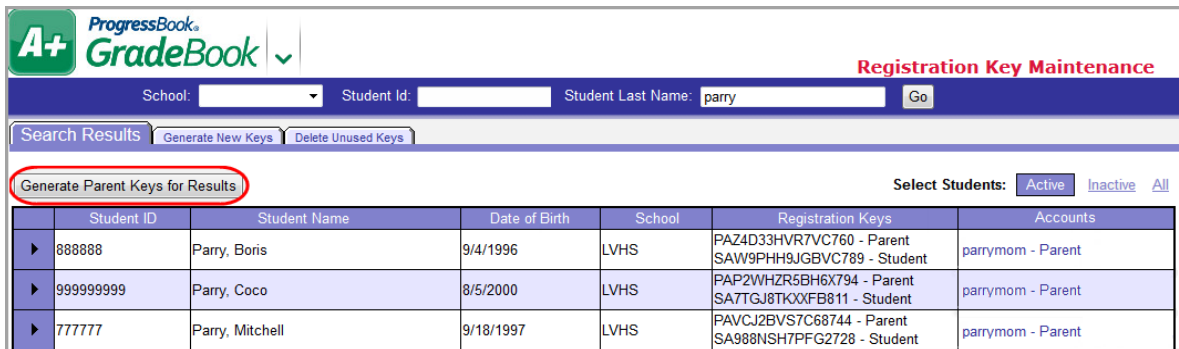The **Registration Key Maintenance** screen displays.

2. Search for the students by entering a full or partial **Student Last Name**, and then click **Go**.

Registration Key Maintenance Screen

A list of students matching the search criteria you entered displays.

3. Optional: To further filter the list of students by enrollment status, for the **Select Students** option, click **Active**, **Inactive** or **All**.

4. Click **Generate Parent Keys for Results**.

Generate Parent Keys for Results

GradeBook generates one additional parent key for each student in the search results.

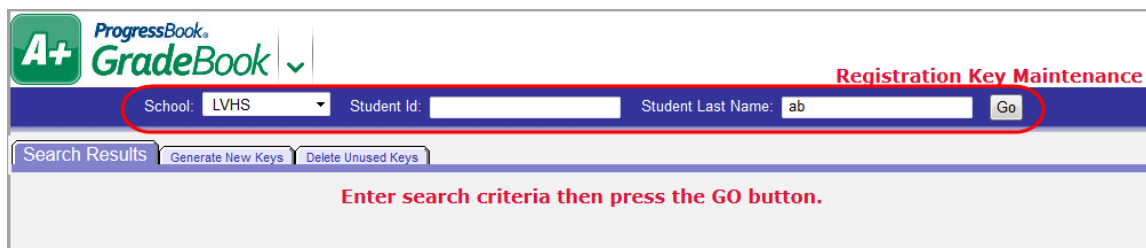# Look Up Registration Keys

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Look-Up-Keys

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.

Registration Key Maintenance Option

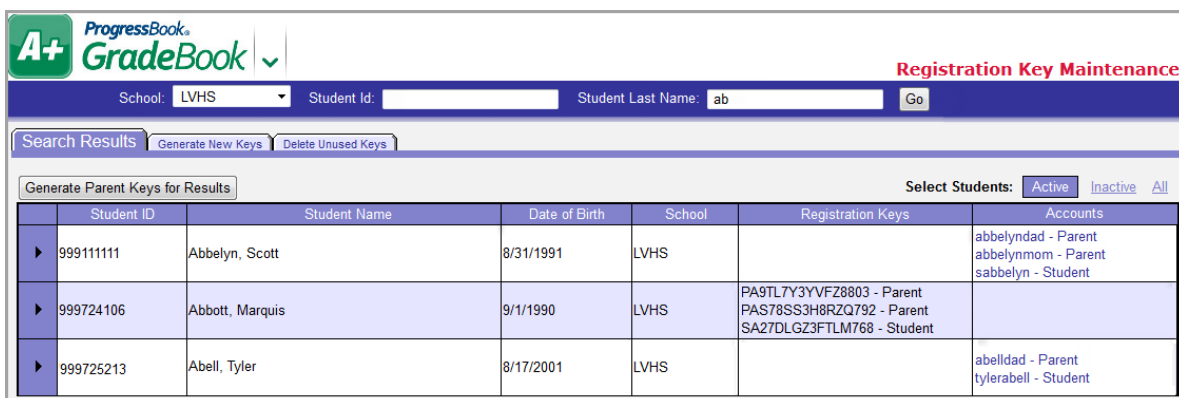The **Registration Key Maintenance** screen displays.

2. Search for the student by selecting the **School** the student attends and/or by entering a partial or full **Student Id** and/or **Student Last Name**, and then click **Go**.

Registration Key Maintenance Screen

A list of students matching the search criteria you entered displays, along with each student's registration keys.

3. Optional: To further filter the list of students by enrollment status, for the **Select Students** option, click **Active**, **Inactive** or **All**.
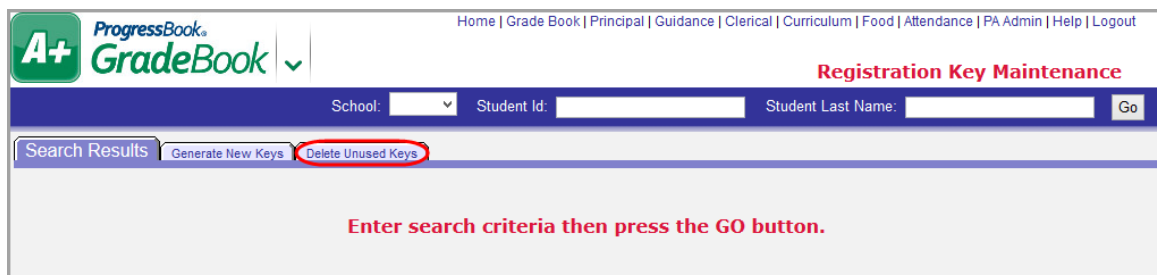

Registration Key Search – Refined Results

Delete Registration Keys by School

This procedure deletes all unused parent and student registration keys by school building. To delete only select parent and student registration keys, see *"Delete Individual Registration Keys."*

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.
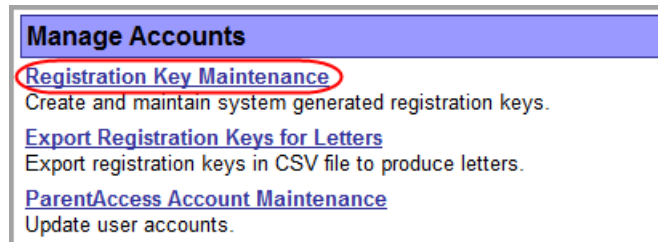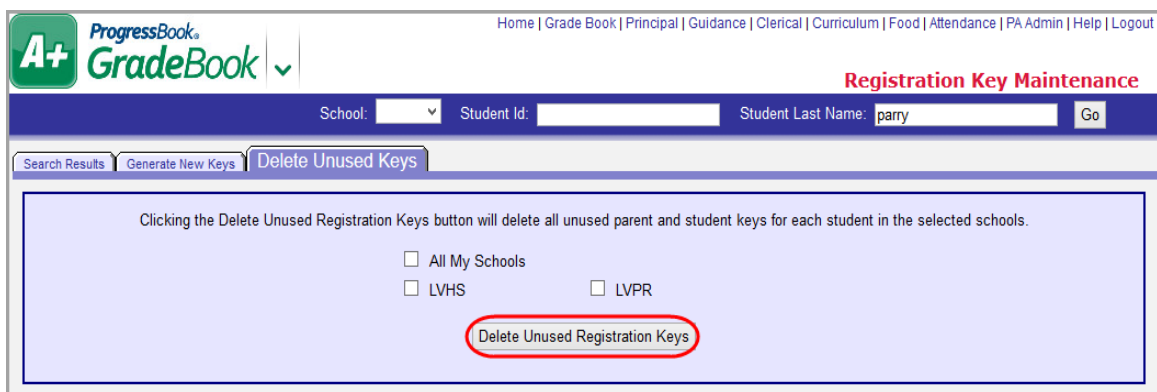

Registration Key Maintenance Option

The **Registration Key Maintenance** screen displays.

2. Click the **Delete Unused Keys** tab.

Registration Key Maintenance Screen

3. Select the schools for which you want to delete all registration keys, or select **All My Schools** to delete all unused registration keys for all buildings to which you have access.

4. Click **Delete Unused Registration Keys**.

Delete Unused Keys Screen

A window displays to confirm that you want to delete all unused Parent and Student registration keys in the selected schools.
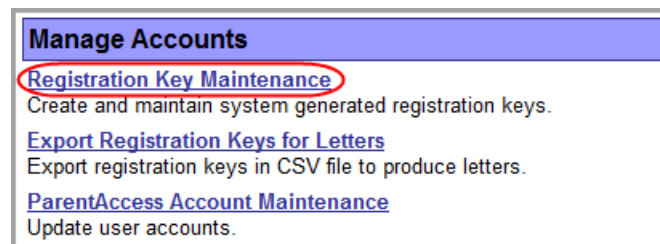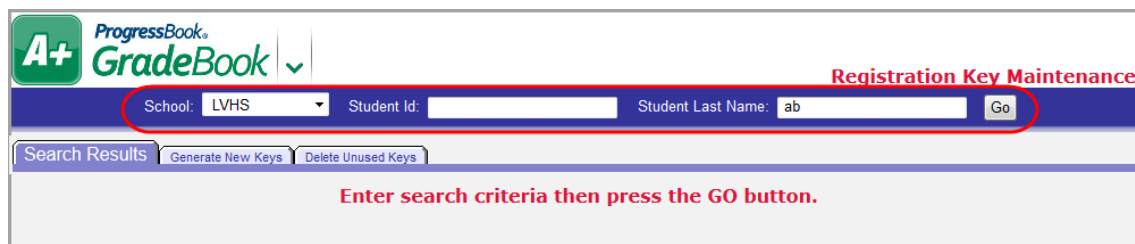
5. Click **OK**.

Delete Individual Registration Keys

This procedure deletes parent or student registration keys for an individual student. To delete all unused parent and student registration keys by school, see *"Delete Registration Keys by School."*

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Delete-Keys

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Registration Key Maintenance**.

Registration Key Maintenance Option

The **Registration Key Maintenance** screen displays.

2. Search for the student by selecting the **School** the student attends and/or by entering a partial or full **Student Id** and/or **Student Last Name**, and then click **Go**.
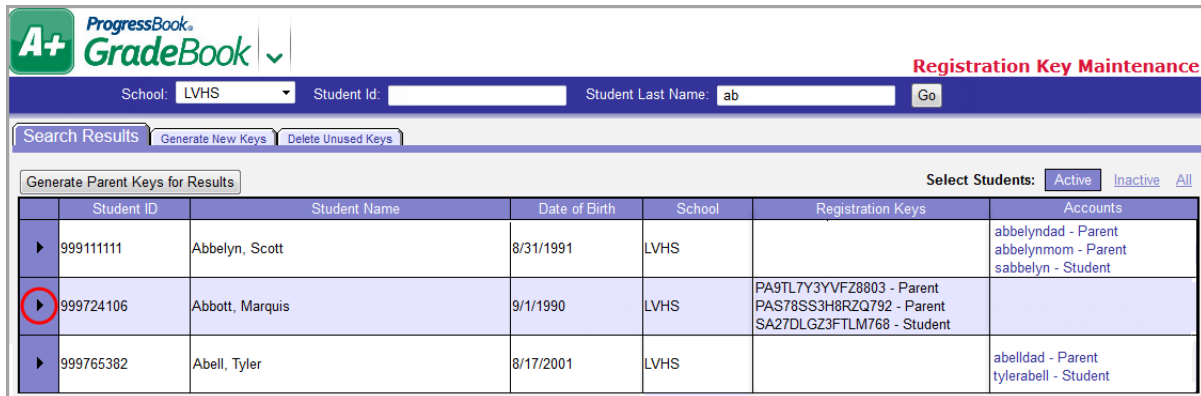

Registration Key Maintenance Screen

A list of students matching the search criteria you entered displays, along with each student's registration keys.

3. Optional: To further filter the list of students by enrollment status, for the **Select Students** option, click **Active**, **Inactive** or **All**.

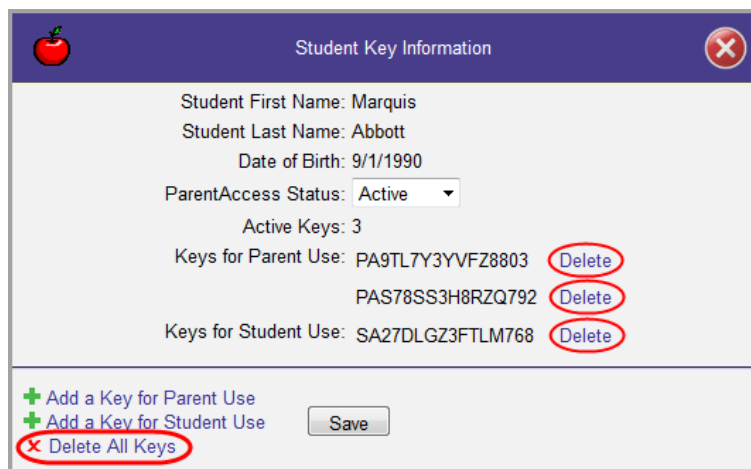4. In the row of the student whose registration key(s) you want to delete, click ▶ .

Registration Key Search – Refined Results

The **Student Key Information** window opens.

5. Click **Delete** next to the key you want to delete, or click **Delete All Keys** to delete all of the keys for this individual student.

Student Key Information Window

6. On the **Confirm Delete** window, click **Ok**.

7. Click **Save**.

Export Registration Keys

Once you generate ParentAccess registration keys, you can extract the keys along with the parent/guardian contact information in the system and then merge this information into a letter to parents explaining how to create their ParentAccess accounts.

To view a video of this procedure, go to:
http://www.progressbook.com/Videos/PA/Export-Keys

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **Export Registration Keys for Letters**.
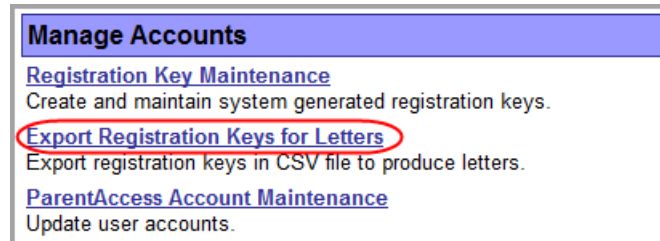
Export Registration Keys for Letters Option

The **Parent Access Export Registration Keys** screen displays.

Parent Access Export Registration Keys Screen

2. Under **Select Extract Method**, select how you want to extract the keys ("By District," "By School" or "By Teacher").

3. In the **Registration Key Creation Date(s)** area, enter a **Start Date** and **End Date** range during which you created the keys.

4. In the **Parent/Student Keys** area, select the key type(s) you want to export ("Parent Keys" and/or "Student Keys").

5. Optional: To include inactive students in the export, select the **Include Inactive Students** check box.

6. Depending on your selection in *step 2*, perform the following additional steps:

   • If you selected **By District**, skip this step.

   • If you selected **By School**, in the **Select Schools** area, select one or more schools for which you want to export keys. (To select more than one school, hold down the <Ctrl> key while making your selections.)

   • If you selected **By Teacher**, in the **Select Schools** area, select one or more schools for which you want to export keys, and then in the **Select Staff for Extract** area, select one or more staff members for whose students you want to export keys. (To select more than one school or staff member, hold down the <Ctrl> key while making your selections.)

7. Optional: To generate an export file that includes one row per student, with separate columns for each key, select the **Output single row per student** check box. (The default output contains a row for each key.)

   Note: *If more than one address type exists for a student, the row repeats for each address type.*

8. Optional: To create a file name of your choosing for the export file, enter the desired name in the **Filename** field.

9. Click **Submit**.

10. On your Internet browser's pop-up window, select whether to open or save the extracted file.

    The file opens in your spreadsheet software or saves to the location you selected.

11. In a word processing application, create a letter to parents explaining how to create their ParentAccess account.

12. Merge the spreadsheet file into the letter file.

    Note: *For more specific instructions about performing a mail merge, see the Help documentation for the word processing application.*

Maintain ParentAccess Accounts

This topic explains how to make changes to a user account in ParentAccess, including updating account information, disabling an account, removing a student from an account, unlocking an account, deleting an account and resetting a password.

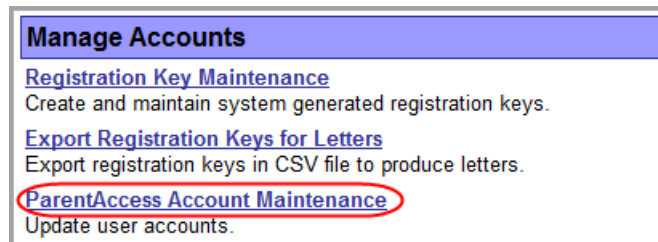To view videos of these procedures, go to:
http://www.progressbook.com/Videos/PA/Update-Account

http://www.progressbook.com/Videos/PA/Disable-Account

http://www.progressbook.com/Videos/PA/Remove-Student

http://www.progressbook.com/Videos/PA/Delete-Account

1. On the **ParentAccess Administration** screen, under **Manage Accounts**, click **ParentAccess Account Maintenance**.

ParentAccess Account Maintenance Option

The **ParentAccess Account Maintenance** screen displays.

2. Optional: If you want to export a .csv file that includes all user account information for all schools, click **Export All**.

3. Search for the user account you want to update by selecting the **School** and/or by entering a partial or full **User's Last Name**, **Email Address**, **User Name**, **Student's Last Name** and/or **Student ID**, and then click **Go**.

ParentAccess Account Maintenance Screen

A list of user accounts matching the search criteria you entered displays.

4. Optional: To further filter the list of user accounts, in the **Accounts** area, click **With Students** or **Without Students**.

5. Optional: To export a .csv file that includes user account information for the accounts in your search results, click **Export Results**.

User Account Search – Refined Results

6. In the row of the user account that you want to update, click ▶.

   The **Update User** window opens.

7. To make any needed update to the user's profile information:

   a. On the **Profile** tab, make changes as follows:

      • To update name, user name or email address information, enter the new information in the **First Name**, **Last Name**, **User Name**, and/or **Email Address** fields.

      • To disable the account, in the **Status** drop-down list, select **Disabled**.

      • To remove a student from the account, in the **Students** area, beside the student's name, click **Delete**, and on the confirmation window, click **OK**.

      • To unlock an account that is locked due to too many failed login attempts, click the **Unlock** link, and on the confirmation window, click **OK**.

      • To delete the account, at the bottom-left corner of the screen, click **Delete**, and on the confirmation window, click **OK**.

   b. Click **Update**.

8. To send the user an email with password reset instructions, at the bottom of the window, click **Send password reset**.

   Note: *This link does not display if the user has not provided an email address.*
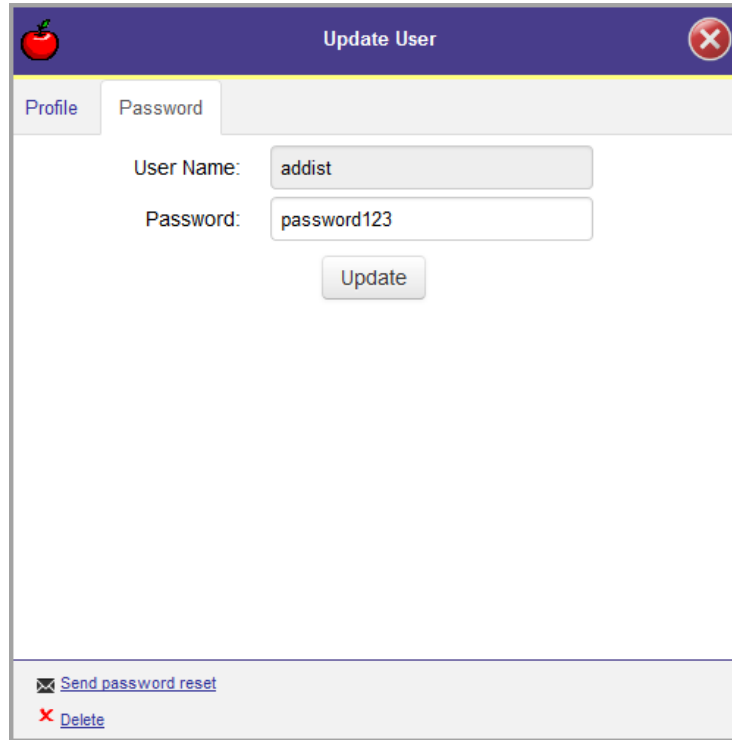
Update User Window – Profile Tab

9. To reset a password for a user:

   a. On the **Password** tab, in the **Password** field, enter a new password.

   *Note: The **Password** tab only displays if one or more of the following conditions are met:*

   - The account is a student account.
   - The account is a parent account and one of the following is true:
     - You have the role of Master or School Administrator.
     - You have the role of Clerk, Principal or School Support, and the **Enable Password Change?** option is selected for this school. (See *"Maintain District Settings."*)

   b. Click **Update**.

   c. Recommended: Encourage the user to create a new secure password once s/he signs in.

Update User Window – Password Tab