ProgressBook ParentAccess Administration Guide

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(This document is current for v18.0.0 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
18.0.0	*"Maintain District Settings"*	2	Updated text and screen shot to reflect addition of new sign-in settings.
18.0.0	*"Maintain Registration Keys"*	39	Added note to indicate that student Google OAuth accounts do not require registration keys.
18.0.0	*"Maintain ParentAccess Accounts"*	50	Added note to indicate that you cannot reset passwords to student OAuth accounts.
18.0.0	*"Import Accounts"*	53	Added section.
17.1.0	*"Set Page Level Security"*	5	Updated screen shot to reflect new **View Locker** subitem of **Schedule** item.
17.1.0	*"Menu Items"*	6	Added explanation of **View Locker** subitem of **Schedule** item.

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 **PA Admin** at the top of your home screen.
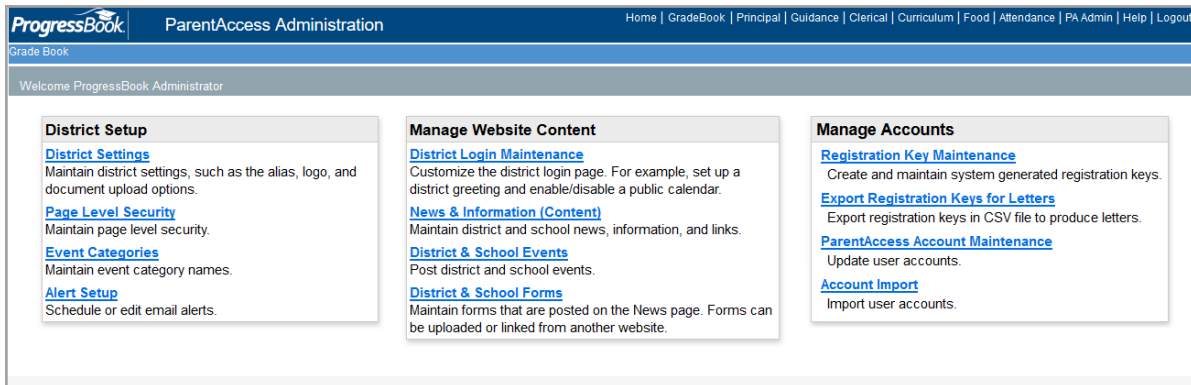
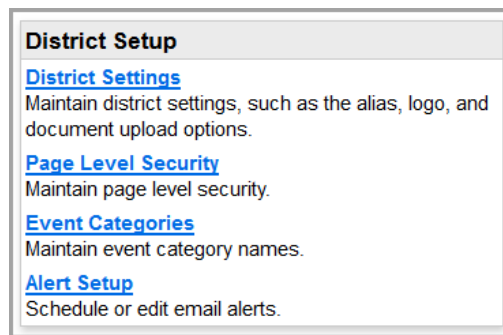# District Setup

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

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

1. On the **ParentAccess Administration** screen, below **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.

   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 display on the **Districts** screen and on the ParentAccess banner.

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 display on the **Districts** screen, in the **Logo File Name** field, enter 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 the ProgressBook GradeBook System Manager Guide.

7. For the **Allow users to sign up for account?** option, select **Yes** to display the sign-up and forgot password links on the **Sign In** screen in ParentAccess, or select **No** to hide the links.

   • Selecting **No** for this option prohibits parents from creating accounts for their children and from resetting their children's passwords.

   • Selecting **No** for this option prevents teachers from resetting student passwords.

8. For the **Allow teachers to upload images?** option, select **Yes** to let teachers upload images to ParentAccess or **No** to disallow image uploads.

9. For the **Allow teachers to upload documents?** option, select **Yes** to let teachers upload documents to ParentAccess or **No** to disallow document uploads.

   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.

10. For the **Allow schools to use Google OAuth?** option, select **Yes** to let students log into ParentAccess using Google™ accounts, or select **No** to allow only standard sign-in.

11. In the **School Preferences** section, for each school:

    a. In the **Password** area, select the radio button beside either **Allow only masters and school admins to change parent passwords** or **Allow principals, clerks, masters, and school admins to change parent passwords** to designate which roles that you want to be able to reset parent passwords.

       *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.")*

    b. In the **Attendance Comments** area, select the radio button beside either **Show attendance comments in ParentAccess** or **Hide attendance comments but show attendance codes in ParentAccess** to designate how you want attendance to display on the **Attendance** screen for parents and students.

    c. In the **ParentAccess Sign-In** area, select the radio button beside either **Enable password sign-in for students** or **Disable password sign-in for students** to designate how you want to let students log into ProgressBook.

       • If you select **Enable password sign-in for students**, students can log into ProgressBook using standard ProgressBook accounts.

- If you select **Disable password sign-in for students**, students must use Google to log into ProgressBook. They cannot use standard ProgressBook accounts. If you select this option, ensure that the **Allow schools to use Google OAuth?** option above the **School Preferences** section is enabled.

  Note: If you disable password sign-in for students, they cannot create their own accounts or request password resets. Parents and GradeBook users also cannot create their accounts or reset their passwords for them.

    d. In the **Student schedules area**, select the radio button beside either **Show schedules in ParentAccess before the start of school** or **Hide schedules until start of school** to designate when you want schedules to display to students and parents.

        i. If you select **Show schedules in ParentAccess before the start of school**, below **On this date**, designate the date on which students and parents can begin viewing schedules in ParentAccess.

        ii. (Optional) If you select **Show schedules in ParentAccess before the start of school** but you do not want students or parents seeing teachers' names before school, select the **Hide teacher names** check box.

12. Click **Save**.

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 (e.g., teacher, principal, or guidance counselor), parent, or student.

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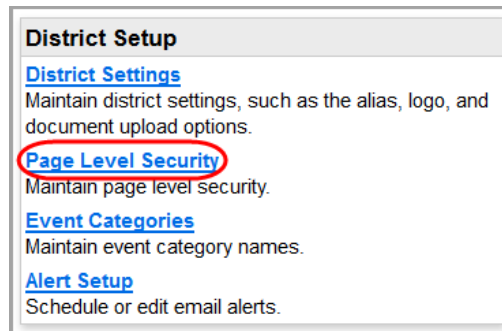
   The **Page Level Security** screen displays. You can set the security access for any screen or option for roles that are not grayed out.

   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. In the row of each ParentAccess screen or option to which you want to grant access for a particular security role, select the check box in the column of the role (**GradeBook**, **Parent**, and/or **Student**).

3. In the row of each ParentAccess screen or option to which you want to deny access for a particular security role, de-select the check box in the column of the role.

4. Click **Save**.

   Note: For an explanation of each menu item and subitem, see "Menu Items."

Menu Items

- *"Student"*
- *"School"*
- *"Family"*

Student

- **Home** – Access to the **Home** screen for parents and the **Dashboard** screen for students
- **Attendance** – Access to the **Attendance** screen
  - **Attendance Totals** – Access to absence and tardy totals on attendance details screens
- **Grades** – Access to the **Grades** screen
- **Homework Planner** – Access to the **Planner** screen
- **Schedule** – Access to the **Schedule** screen (which may also include locker, transportation, and counselor information)
  - **View Transportation** – Access to transportation information on the **Schedule** screen (when the **Parent** role is selected, only the primary contact can access the information)
  - **View Locker** – Access to locker information (number and combination) on the **Schedule** screen (when the **Parent** role is selected, only the primary contact can access the information)
- **Report Card** – Access to the **Report Card** screen (not official grades)
  - **View Official Report Cards** – Ability to click the **View Paper Report Card** link that downloads a PDF version of the official report card
- **Course Request** – Access to the **Course Request** screen
- **Activities** – Access to the **Activities** screen (only to view activities, not to submit them)
  - **Submit Student Activity** – Ability to submit responses to assigned VirtualClassroom activities
- **Resources** – Access to the **Resources** screen (VirtualClassroom resources)
- **Fees** – Access to the **Fees** screen as well as to a notification that may display on the **Schedule** screen (when the **Parent** role is selected, only the primary contact can access this information)

School

- **News** – Access to the **News** screen (information posted by the district administrator)
- **Calendar** – Access to the **Calendar** screen
- **Class Information** – Access to the **Class Information** screen (information posted by teachers on the **Class Information Page Maintenance** screen)

Family

- **Alerts** – Access to the **Alerts** screen for notification of low grades and missing assignments
- **My Account** – Access to the **My Account** screen
  - **Profile** – Access to the **My Account** screen **Account Info** tab
  - **Change Password** – Access to the **My Account** screen **Change Password** tab
  - **Manage Student** – Access to the **My Students** tab
    - **Create Student Accounts** – Access to the **Create Account** button on the **My Student** screen
    - **Reset Student Password** – Access to the **Reset Password** button on the **My Student** tab

- **Student Contacts** – Access to the **Student Contact** screen (populated from SIS)
  - **Edit Contact** – Ability to click **Edit** on contacts (excluding the primary contact's main address and main phone number)
- **Student Profile** – Access to the **Student Profile** screen (**Profile** and **Address** areas)
  - **View Notes (i.e. SIS Medical and Custody Alerts)** – Access to the **Notes** area of the **Student Profile** screen

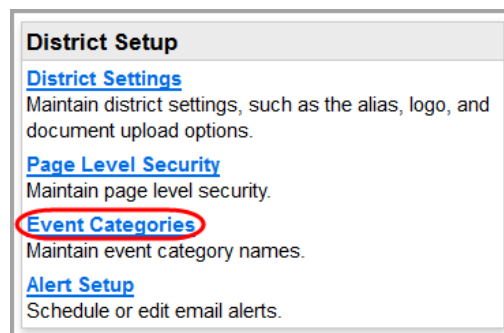# Maintain Event Categories

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

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

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.

The **Event Category Maintenance** screen displays.

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

3. Click **Save**.

Update or Delete Event Categories

Note: You cannot delete event categories if any events are associated with them.

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

The **Event Category Maintenance** screen displays.

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 are more than 0
- Included in the student's average
- Marks are posted to ParentAccess
- Due date is 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

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

The **Parent Access Alerts** screen displays

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** – Send the alert every day at a specified time

   • **Weekly** – Send the alert weekly on a specified day and time

   • **Manual** – 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 individual school(s) or **All Schools**.

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

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

Run Alerts

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

1. On the **ParentAccess Administration** screen, below **District Setup**, click **Alert Setup**.
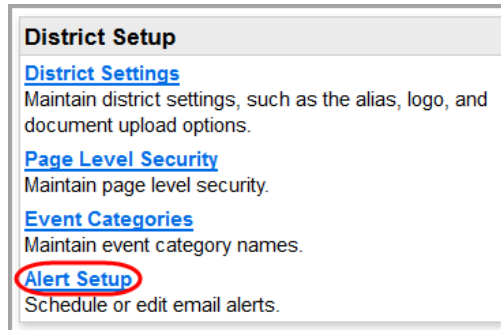
The **Parent Access Alerts** screen displays. In the **Action** column, an alert is available to run if displays in color (not grayed out).

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

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

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

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

You can update alerts at any time.

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

The **Parent Access Alerts** screen displays.
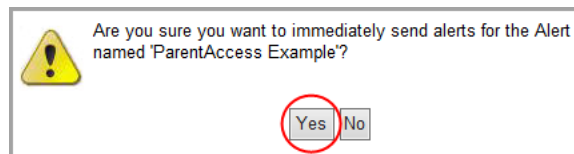

2. In the row of the alert you want to update, click ▸.

3. On the **Alert Maintenance** window:

   • 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**.

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, below **Manage Website Content**, click **District Login Maintenance**.

The **District Login Maintenance** screen displays.

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 display to 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 display on the district greeting screen, do the following:

    a. Click **Upload a picture**.
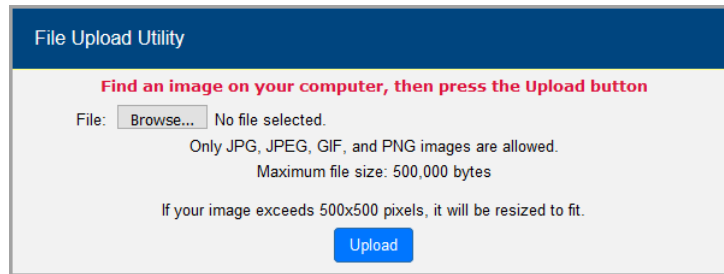
        The **File Upload Utility** window displays.

    b. Click **Browse**, and then browse to and select the image from your computer.

    c. Click **Upload**.

    d. In the **Display the picture on the...** drop-down list, 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 displays to ParentAccess users on their **Sign In** screens.

Update District Greeting Page

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

Manage Website Content

District Login Maintenance
Customize the district login page. For example, set up a district greeting and enable/disable a public calendar.

News & Information (Content)
Maintain district and school news, information, and links.

District & School Events
Post district and school events.

District & School Forms
Maintain forms that are posted on the News page. Forms can be uploaded or linked from another website.

The **District Login Maintenance** screen displays.

ProgressBook. District Login Maintenance

Grade Book

District Login Features

Custom Greeting: ☑ Active

Public Calendar: ☑ Active

Hide URL   https://crnt-pa.software-answers.com/School/Calendar/Public/lvsd

Format the Custom District Greeting

Greeting Picture: (Optional) (500 x 500px)

Upload a picture
Remove the picture
Picture Position: Top

Greeting:

B I U S x₂ xª Iₓ

Welcome to ProgressBook!

For additional information on creating accounts, navigating ProgressBook and viewing your child's information, click Help in the top-right corner of the screen.

Check Spelling   Save

2. Make any updates as follows:

   • To disable the district greeting screen, de-select 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 **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, below **Manage Website Content**, click **District Login Maintenance**.

The **District Login Maintenance** screen displays.

2. Select the **Active** check box beside **Public Calendar**.

3. Click **Save**.

The **District Calendars** link now displays on the ParentAccess **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.
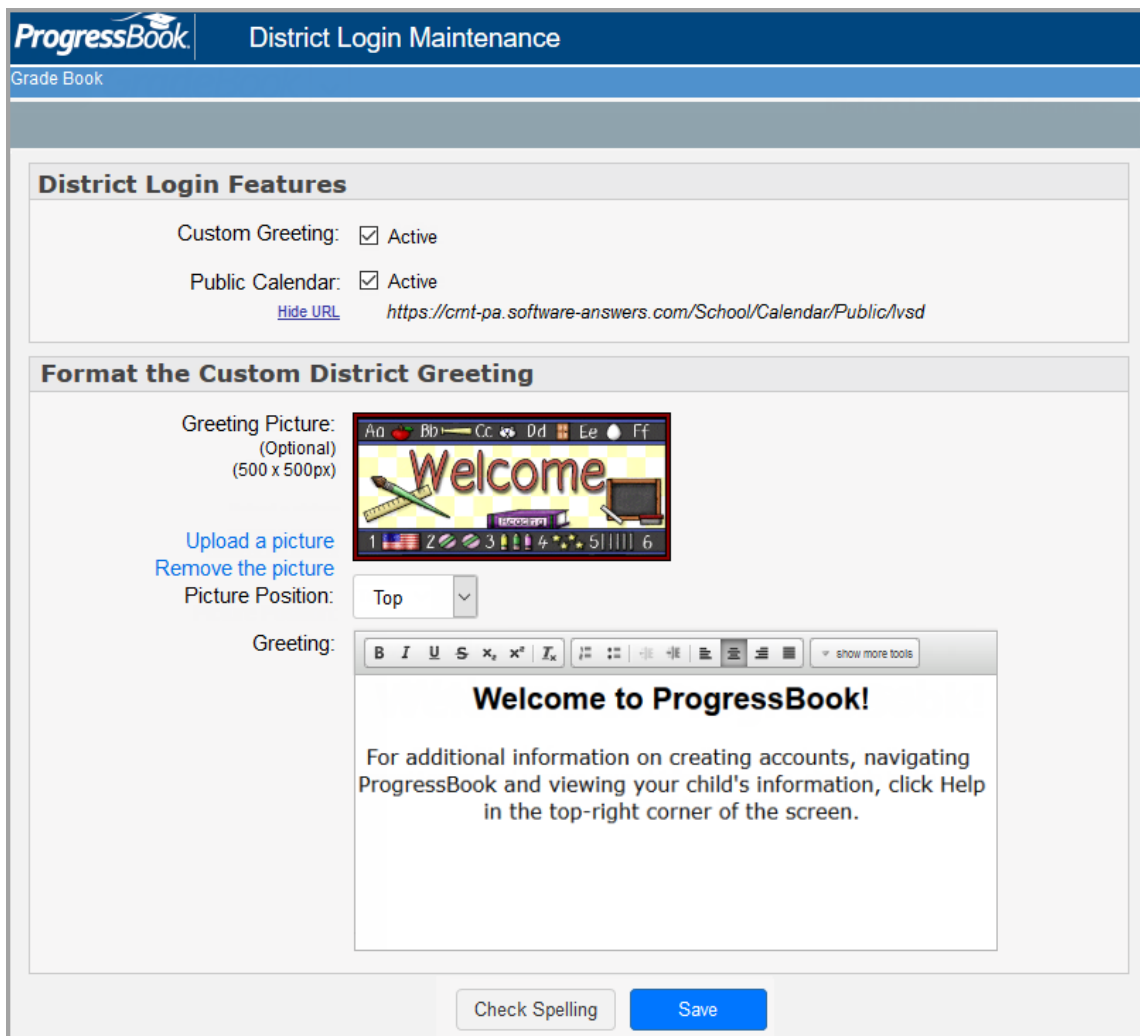
Maintain News and Information

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

1. On the **ParentAccess Administration** screen, below **Manage Website Content**, click **News & Information (Content)**.
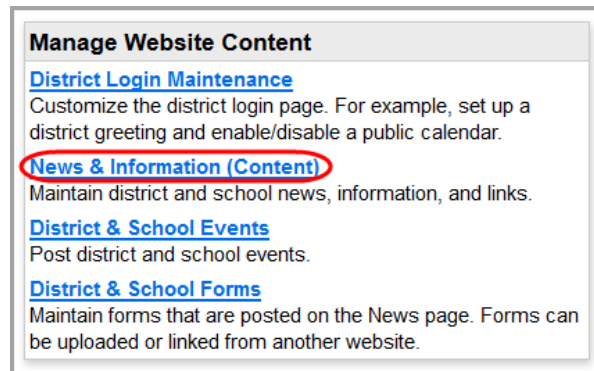
The **Content Search** screen displays.
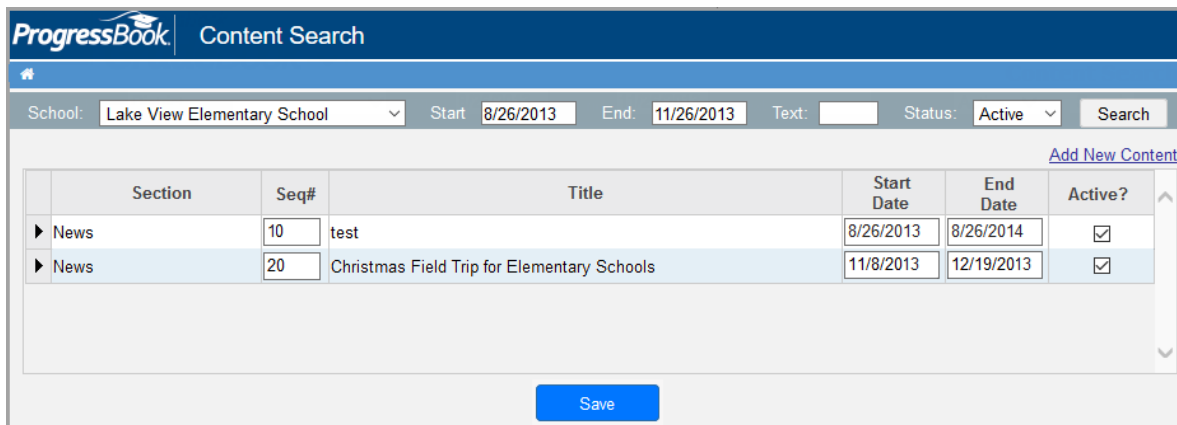
2. Click **Add New Content**.

The **Content Maintenance** screen displays.

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** area, select the **Active** check box.

5. In the **Date Range** fields, enter or select the start and end dates during which this news item should display.

6. In the **Display Section** area, 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 displays 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 that 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**.)

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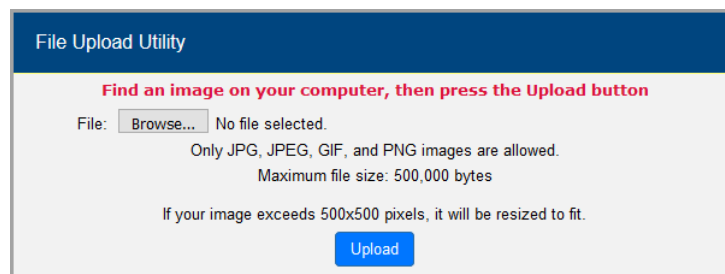
2. (Optional) If you want an image to display with the news article, do the following:

   a. Below **Article Picture**, click **Upload a picture**.
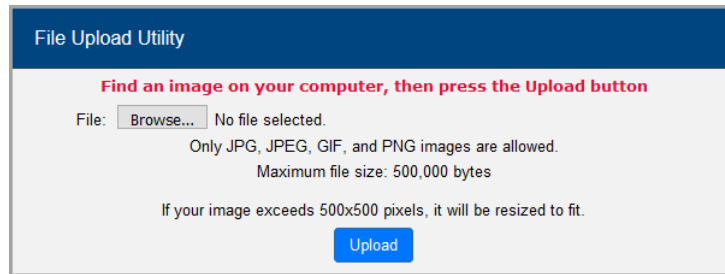
      The **File Upload Utility** window displays.

      File Upload Utility

      Find an image on your computer, then press the Upload button

      File: [Browse...] No file selected.

      Only JPG, JPEG, GIF, and PNG images are allowed.

      Maximum file size: 500,000 bytes

      If your image exceeds 500x500 pixels, it will be resized to fit.

      [Upload]

      ---

   b. Click **Browse**, and then browse to and select the image from your computer.

   c. Click **Upload**.

   d. In the **Picture Position** drop-down list below 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. Below **Summary Picture**, click **Upload a picture**.

         The **File Upload Utility** window displays.

         File Upload Utility

         Find an image on your computer, then press the Upload button

         File: [Browse...] No file selected.

         Only JPG, JPEG, GIF, and PNG images are allowed.

         Maximum file size: 500,000 bytes

         If your image exceeds 500x500 pixels, it will be resized to fit.

         [Upload]

         ---

      ii. Click **Browse**, and then browse to and select the image from your computer.

      iii. Click **Upload**.

      iv. In the **Picture Position** drop-down list below 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.   Below **Popup Picture**, click **Upload a picture**.

        The **File Upload Utility** window displays.

        File Upload Utility

        Find an image on your computer, then press the Upload button

        File: Browse... No file selected.
        Only JPG, JPEG, GIF, and PNG images are allowed.
        Maximum file size: 500,000 bytes

        If your image exceeds 500x500 pixels, it will be resized to fit.
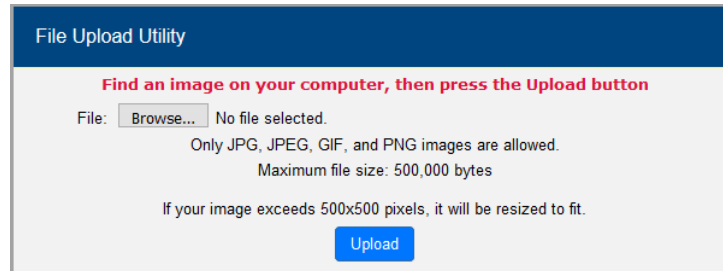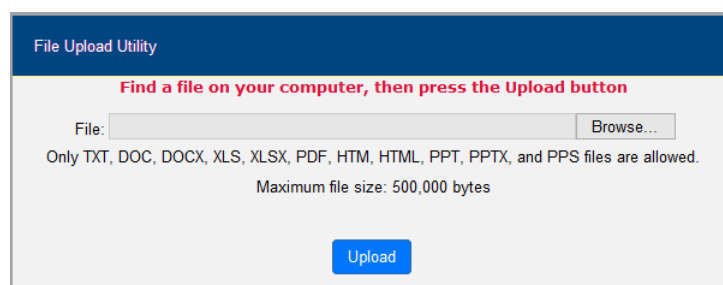
        Upload

   ii. Click **Browse**, and then browse to and select the image from your computer.

   iii. Click **Upload**.

   iv. In the **Picture Position** drop-down list below 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**.

   Upload the Document

   Upload a new form
   View the form

   Document Picture:
   (Optional)
   (News: 200 x 200px)
   (Info & Links: 50 x 50px)

   Upload a picture
   Remove the picture

   No Image Chosen

   Picture Position: Bottom ⌄
   Summary:

   The **File Upload Utility** window displays.

   File Upload Utility

   Find a file on your computer, then press the Upload button

   File: Browse...
   Only TXT, DOC, DOCX, XLS, XLSX, PDF, HTM, HTML, PPT, PPTX, and PPS files are allowed.
   Maximum file size: 500,000 bytes

   Upload

2. Click **Browse**, and then browse to and select the document from your computer.

3. Click **Upload**.

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

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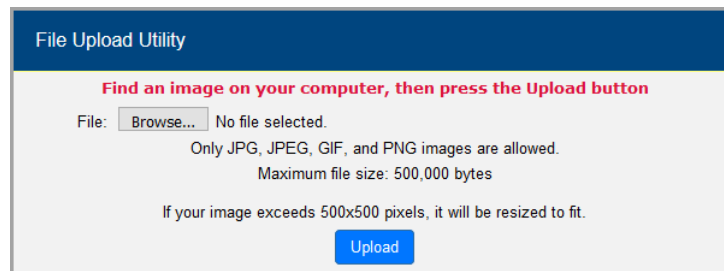
      The **File Upload Utility** window displays.

   b. Click **Browse**, and then browse to and select the image from your computer..

   c. Click **Upload**.

   d. In the **Picture Position** drop-down list below 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**.
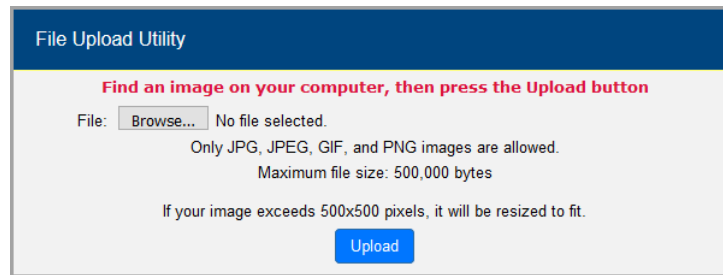
7. Click **Save**.

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).

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

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

The **File Upload Utility** window displays.

b. Click **Browse**, and then browse to and select the image from your computer.

c. Click **Upload**.

d. In the **Picture Position** drop-down list below 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

1. On the **ParentAccess Administration** screen, below **Manage Website Content**, click **News & Information (Content)**.
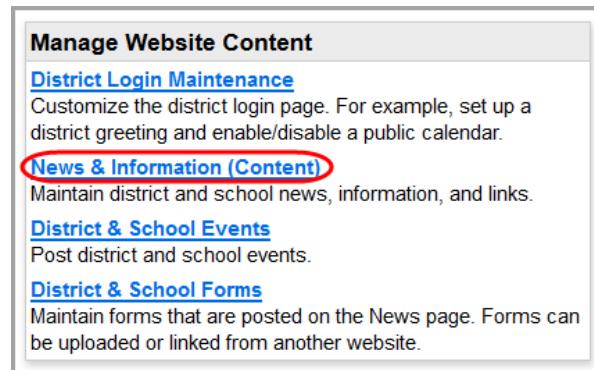
The **Content Search** screen displays.

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 Date**, **End Date**, 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.

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 de-select 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

> *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, below **Manage Website Content**, click **District & School Events**.

The **Event Search** screen displays.

2. Click **Add an Event**.

The **Event Maintenance** screen displays.

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 or select the date on which the event will occur.

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


7. (Optional) 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**.

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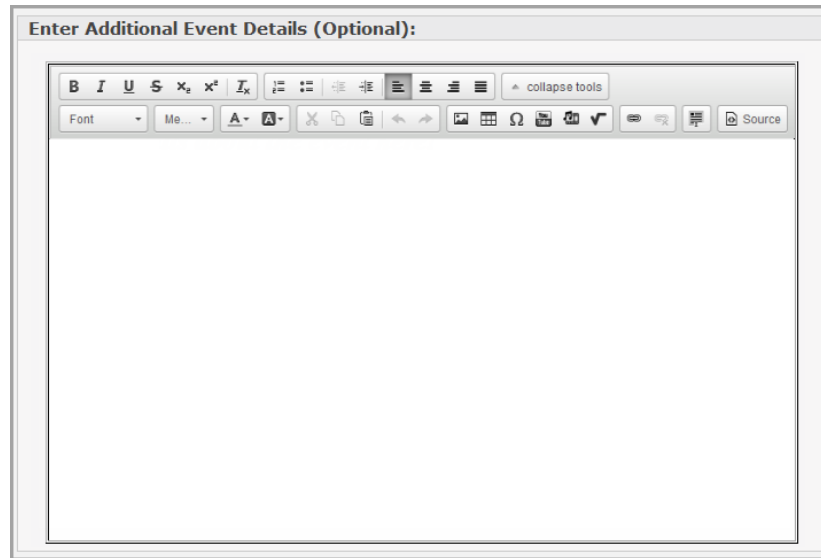
9. (Optional) If you want an image to display with the event, do the following:

   a. In the **Display a picture with your event details** area, click the link that reads **Click here to upload a picture**.
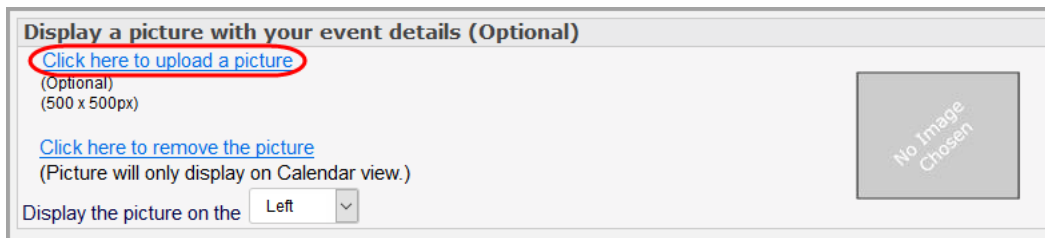
   The **File Upload Utility** window displays.
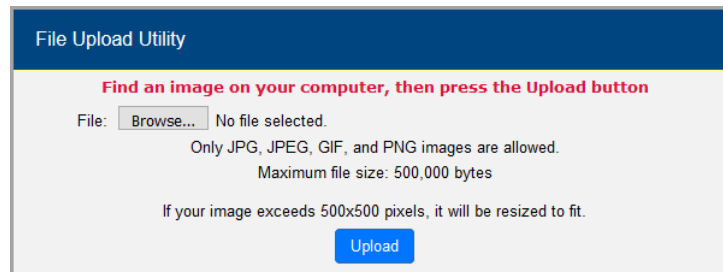
   b. Click **Browse**, and then browse to and select the image from your computer.

   c. Click **Upload**.

   d. In the **Display the picture on the...** drop-down list, 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.

12. (Optional) To check the spelling of all of your entries on this screen, click **Check Spelling**.

13. Click **Save**.

Update Events

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

The **Event Search** screen displays.

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 Date**, **End Date**, **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.

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

    *   To change the status of the event, in the **Active?** column, select or de-select 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 below **Forms**.

*Note: To post a document to appear in ParentAccess in either the main **News** area of the **News** screen or below **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

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

The **Form Search** screen displays.

2. Click **Add a Form**.

The **Forms Maintenance** screen displays.

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 **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 display beside the link, do the following:

    a. Click **Click here to upload an icon**.

        The **File Upload Utility** window displays.
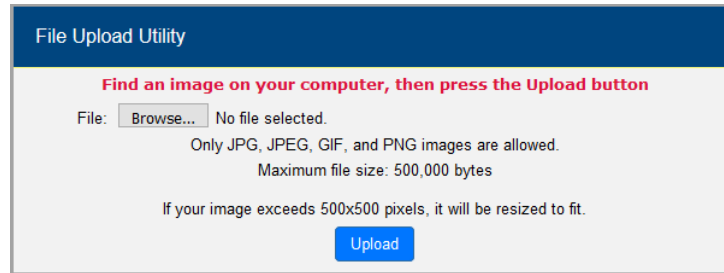
    b. Click **Browse**, and then browse to and select the image from your computer.

    c. Click **Upload**.

7. In the **Enter the date range to use when posting the form** area, enter or select the **Start** and **End** dates during which the link to this form should display.

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 below **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 screen, click **Check Spelling**.

11. Click **Save**.

Update Forms

1. On the **ParentAccess Administration** screen, below **Manage Website Content**, click **District & School Forms**.
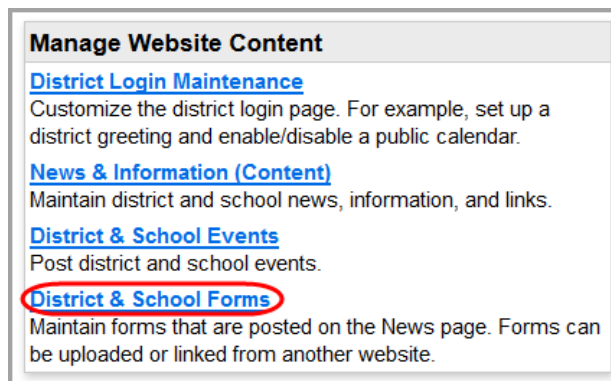
The **Form Search** screen displays.
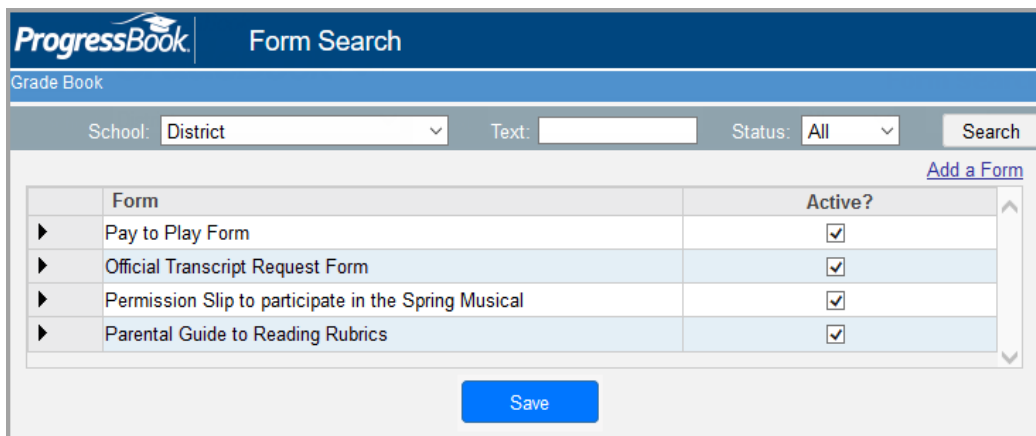
2. (Optional) If you do not see the form you want to update, search for it by entering or selecting any known information in the **School** and **Status** fields and/or by entering a partial or full word in the **Text** field, and then click **Search**.

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

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

- To change the status of the form, in the **Active?** column, select or de-select 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"*
- Imported accounts – See *"Import Accounts"*

Maintain Registration Keys

If the option is enabled, parents and students can use registration keys to create their accounts. Parents use a distinct parent registration key for all of their children to create their own parent account in which they see the information related to all of their children. Students use a student registration key to create their own student accounts in which they see only their own information.

> **Note:** *Creating registration keys is not necessary for student Google OAuth accounts. Parent accounts always require registration keys.*

This topic explains how to perform the following tasks in GradeBook related to maintaining ParentAccess registration keys:
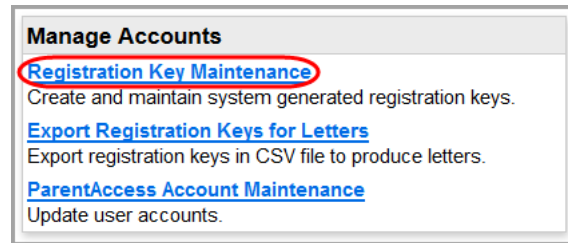
- *"Generate Registration Keys by School"*
- *"Generate Individual Registration Keys"*
- *"Generate Parent Registration Keys"*
- *"Look Up Registration Keys"*
- *"Delete Registration Keys by School"*
- *"Delete Individual Registration Keys"*
- *"Export Registration Keys"* (for parent and/or student letters)

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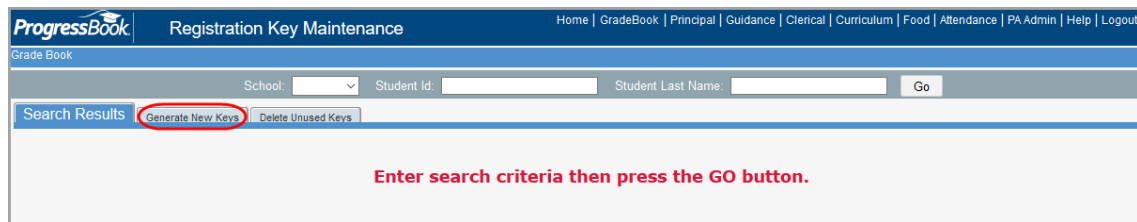
To generate parent and student registration keys for a single student, see *"Generate Individual Registration Keys."* To generate parent keys for a group of students, see *"Generate Parent Registration Keys."*

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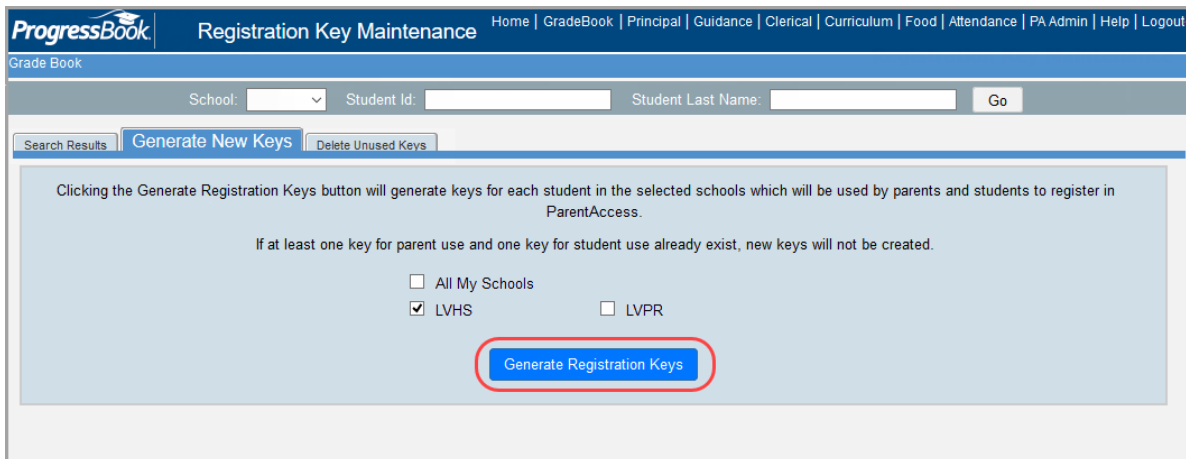

The **Registration Key Maintenance** screen displays.

2. Click the **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. Click **Generate Registration Keys**.

GradeBook generates keys for the primary contact of 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."
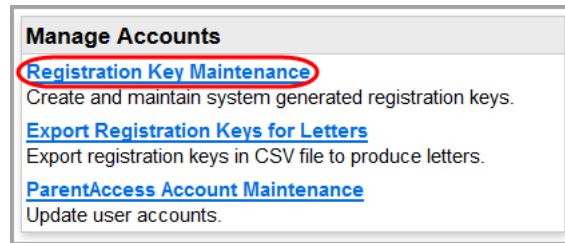
5. (Optional) To see the generated keys, see *"Look Up Registration Keys."*

Generate Individual Registration Keys

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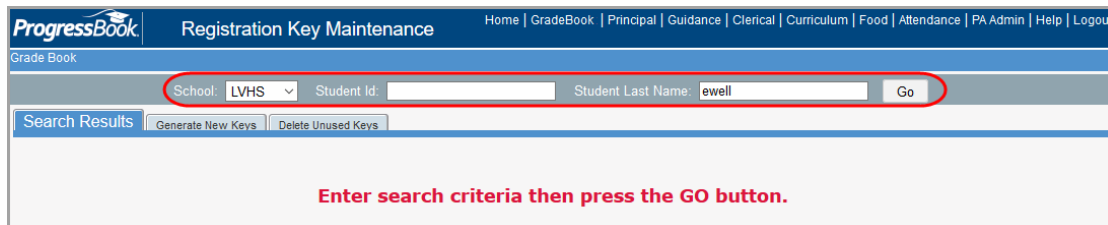
To generate parent and student registration keys for all active students for whom keys do not already exist, see *"Generate Registration Keys by School."* To generate parent keys for a group of students, see *"Generate Parent Registration Keys."*

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

    Manage Accounts

    Registration Key Maintenance
    Create and maintain system generated registration keys.

    Export Registration Keys for Letters
    Export registration keys in CSV file to produce letters.

    ParentAccess Account Maintenance
    Update user accounts.

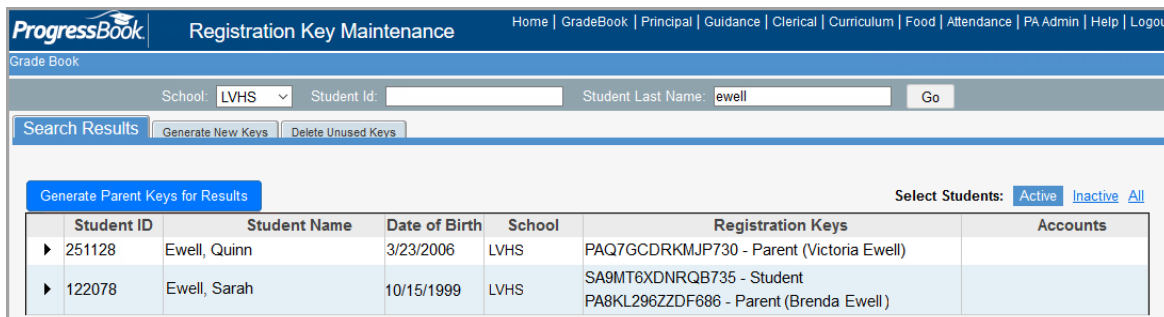   The **Registration Key Maintenance** screen displays.

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**.

    | ProgressBook | Registration Key Maintenance | Home | GradeBook | Principal | Guidance | Clerical | Curriculum | Food | Attendance | PA Admin | Help | Logout |

    Grade Book

    School: LVHS   Student Id: Student Last Name: ewell   Go

    Search Results | Generate New Keys | Delete Unused Keys

    Enter search criteria then press the GO button.

    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 a registration key, click ▸ .

    | ProgressBook | Registration Key Maintenance | Home | GradeBook | Principal | Guidance | Clerical | Curriculum | Food | Attendance | PA Admin | Help | Logout |

    Grade Book

    School: LVHS   Student Id: Student Last Name: ewell   Go

    Search Results | Generate New Keys | Delete Unused Keys

    Generate Parent Keys for Results   Select Students: Active Inactive All

	Student ID	Student Name	Date of Birth	School	Registration Keys	Accounts
▸	251128	Ewell, Quinn	3/23/2006	LVHS	PAQ7GCDRKMJP730 - Parent (Victoria Ewell)	
▸	122078	Ewell, Sarah	10/15/1999	LVHS	SA9MT6XDNRQB735 - Student PA8KL296ZZDF686 - Parent (Brenda Ewell)	

The **Student Key Information** window opens.

5. You can add registration keys for students or parents:

- To add a student registration key, click **Add a Key for Student Use**.

  The key displays in the **Keys for Student Use** field.

  Note: Because each student is only permitted one account, if you have already created a student key, you cannot create another.

- To add a parent registration key, click **Add a Key for Parent Use**.

The **Select a Contact** window opens.

i.   Select the radio button next to the contact for whom you want to generate a key.

ii. Click **Generate a Parent Key**.

Note: Because each contact is only permitted one account, if you have already created a parent key for a particular contact, you cannot create another for that same contact.

The **Select a Contact** window closes automatically. The **Student Key Information** window displays the newly created registration key(s).
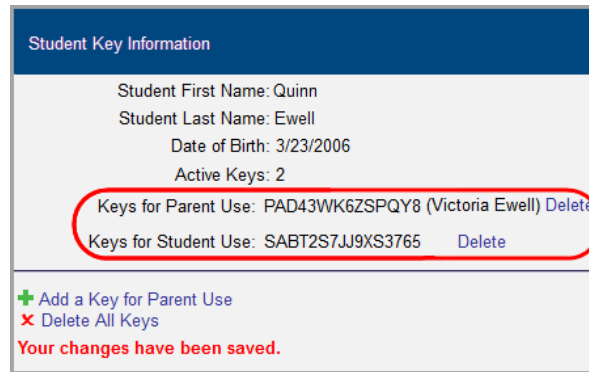
Note: You must reload the Registration Key Maintenance screen before the newly created keys display.

Generate Parent Registration Keys

This procedure generates parent registration keys for a group of students. The generated keys are automatically associated with each student's primary contact, so if you want to generate a registration key for a non-primary contact for a single student, see *"Generate Individual Registration Keys."* To generate parent (primary contact) and student registration keys for all active students for whom keys do not already exist, see *"Generate Registration Keys by School."*

1. On the **ParentAccess Administration** screen, below **Manage Accounts**, click **Registration Key Maintenance**.
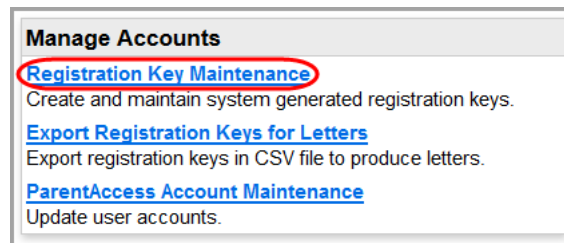
The **Registration Key Maintenance** screen displays.

2. Search for the students by entering a full or partial **Student Last Name**, and then click **Go**.
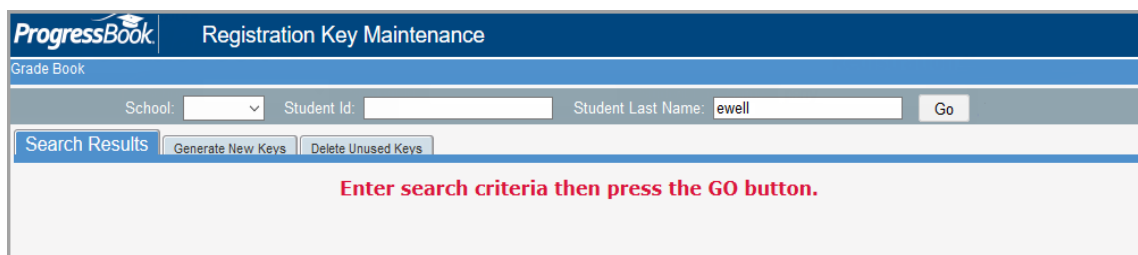
A list of students matching the search criteria you entered displays.

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**.

GradeBook generates one parent key for the primary contact of each student in the search results (unless a parent registration key or account has already been created for the student).

Look Up Registration Keys

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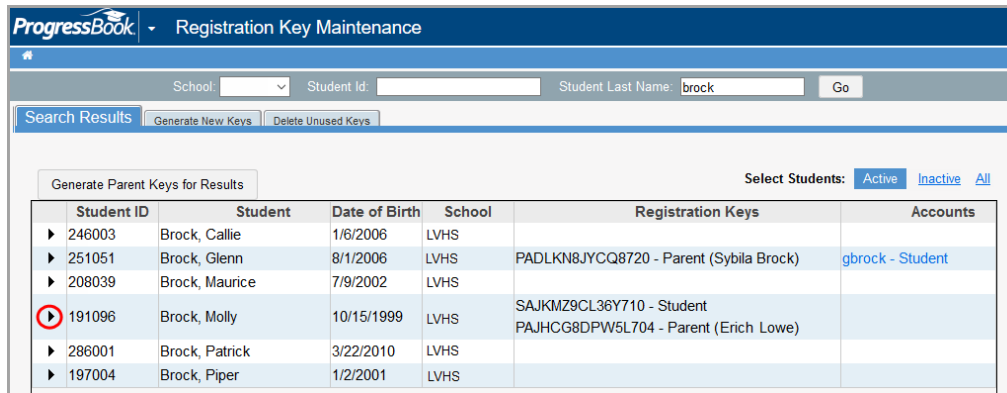

The **Registration Key Maintenance** screen displays.

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**.

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**.

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, below **Manage Accounts**, click **Registration Key Maintenance**.
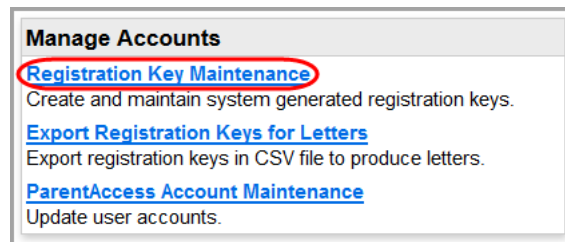
The **Registration Key Maintenance** screen displays.

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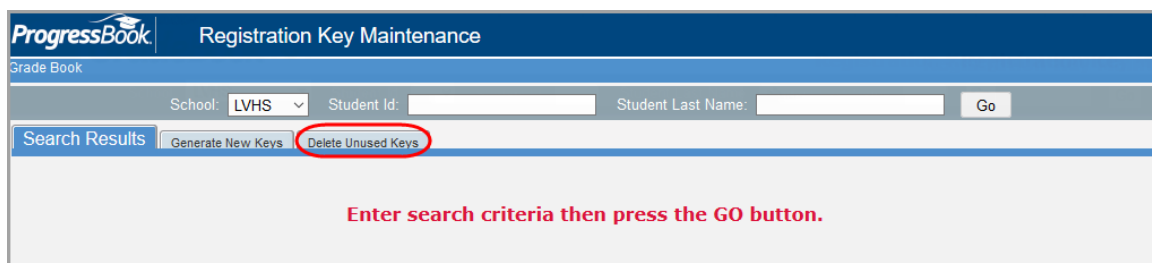
3. Select the schools for which you want to delete all registration keys, or select **All My Schools** to delete all unused registration keys for all buildings to which you have access.

4. Click **Delete Unused Registration Keys**

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."*

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

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**.

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 [▶] .

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.


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

7. Close the **Student Key Information** window.

Note: You must reload the **Registration Key Maintenance** *screen to see that keys have been deleted.*

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.

1. On the **ParentAccess Administration** screen, below **Manage Accounts**, click **Export Registration Keys for Letters**.
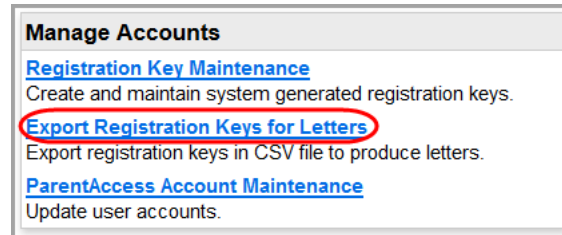
The **Parent Access Export Registration Keys** screen displays.

2. Below **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.)

     Note: *To display inactive schools in the* ***Select Schools*** *multi-select list, select the* ***Show Inactive School(s)*** *check box.*

   • 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.

> *Note: You cannot reset passwords to student Google OAuth accounts.*

1. On the **ParentAccess Administration** screen, below **Manage Accounts**, click **ParentAccess Account Maintenance**.
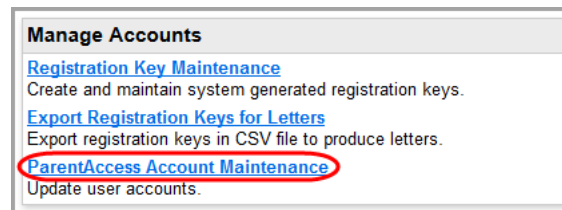
The **ParentAccess Account Maintenance** screen displays.

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**.

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**.

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**.

         Note: If a 👤 *displays after a student's name, a **Master** user or **School Administrator** has blocked access to viewing the student's information in ParentAccess.*

      • 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.

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 that does not use OAuth.
      • 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 they sign in.


Import Accounts

This topic describes how to import student accounts from other sources using .csv files or StudentInformation so that you can bulk create ProgressBook accounts. Refer to the following topics:

- *"Import Accounts from CSV"*
- *"Import Accounts from StudentInformation"*

Import Accounts from CSV

1. Create or ensure that you have a .csv file with the necessary account information.

   - For standard ProgressBook account logins, the student number, the username, and the email address of each student must be imported. If you do not include passwords, each student must request a password reset for their individual account.

   - For OAuth accounts (such as Google™), the student number and the issuer email claim (such as a Gmail address) of each student must be imported.

2. On the **ParentAccess Administration** screen, below **Manage Accounts**, click **Account Import**.
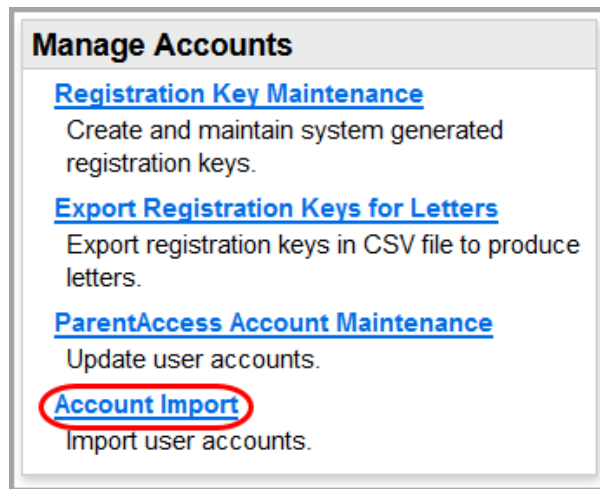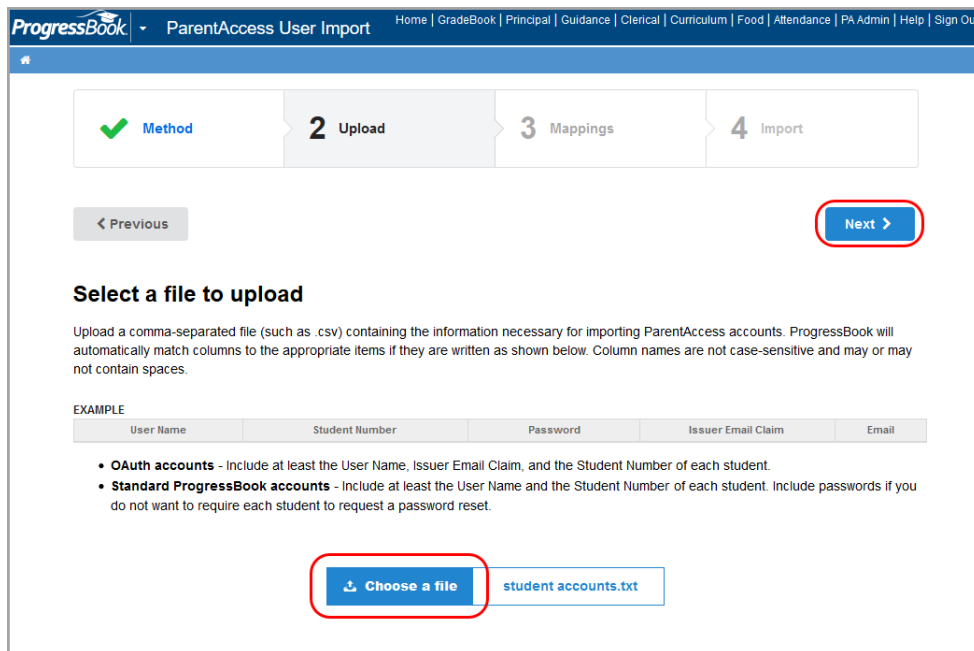

3. On the **ParentAccess User Import** screen **Method** tab, below **Upload File**, click **Upload**.
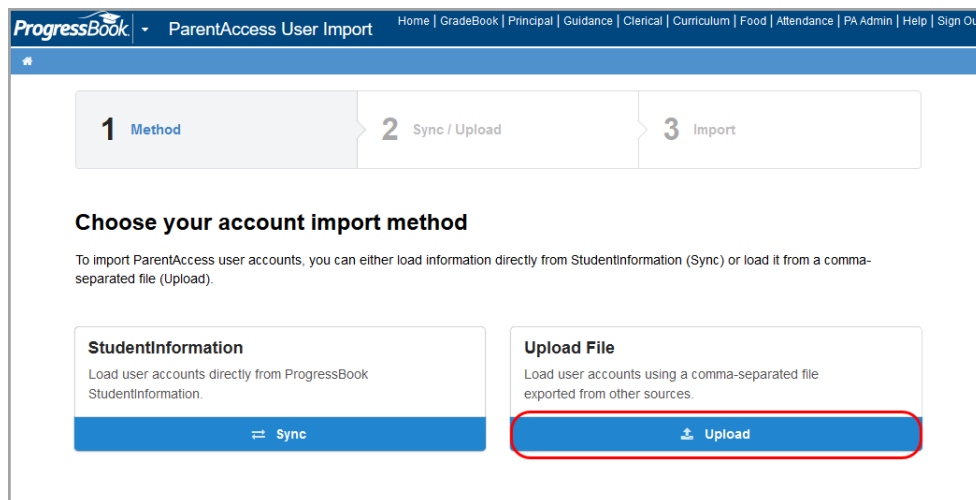
The **Upload** tab displays indicating the type of information you need in the file you intend to upload.

4. At the bottom of the screen, click **Choose a File**, and then select the comma-separated file you want to upload.

5. Click **Next**.

The **Mappings** tab displays.

6. Verify that ProgressBook has matched the columns from your file to the correct items. For drop-down lists to which you do not have a match, select **[None]**.

- **User Name** – Select the column containing student usernames.

- **Student Number** – Select the column containing the student numbers.

- **Issuer Email Claim** – If you intend to allow or require students to sign in using OAuth, select the column containing the student issuer email claims (such as Gmail addresses).

- **Email** – Select the column containing student email addresses.

- **Password** – Select the column containing student passwords.

7. Click **Next**.

Depending on the size of the file, the **Import** tab may take a few minutes to display.

8. Review the information. Correct any errors and upload the file again before proceeding.

    Note: *You may receive one or more warnings. Review these warnings prior to importing the accounts. If you still want to import the accounts after acknowledging the warnings, continue to step 9.*

9. If the information is correct, click **Import**. (Otherwise, correct any issues before proceeding.)

The **Import** tab then displays a count of **New Accounts**, **Updates**, and **Skipped** accounts.


If you imported student OAuth accounts, you must enable OAuth sign-in before students can log into ParentAccess using a third-party account. See *"Maintain District Settings."*

If you imported standard ProgressBook accounts with passwords, students can now log into ParentAccess. If you did not include passwords, each student must request a password reset in order to create a password to log into ParentAccess.

Import Accounts from StudentInformation

This topic describes how to import student OAuth accounts from StudentInformation so that you can bulk create ProgressBook accounts.

1. Ensure that the email address (acting as the issuer email claim) and the student number of each student have been entered onto the **Edit Student Profile** screen **General** tab in StudentInformation. The email address is pulled from the **Email** field, and the student number is pulled from the **Student Number** field with any leading zeros omitted.

2. On the **ParentAccess Administration** screen, below **Manage Accounts**, click **Account Import**.
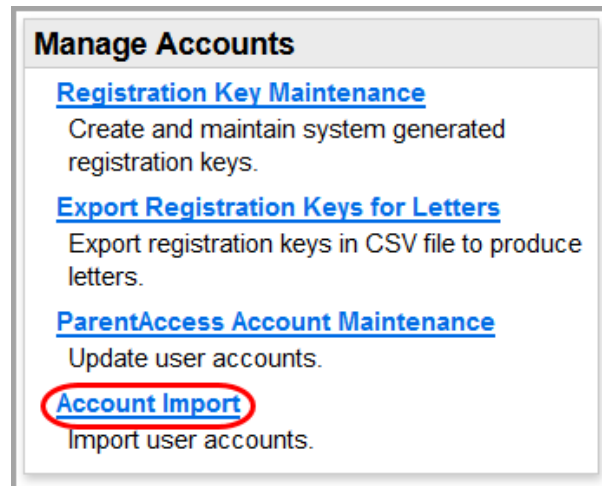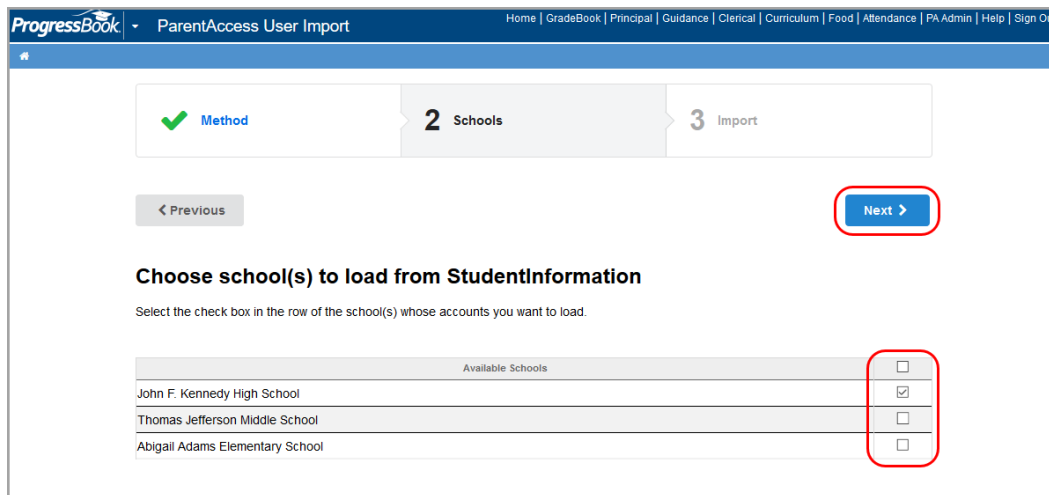

3. On the **ParentAccess User Import** screen **Method** tab, below **StudentInformation**, click **Sync**.
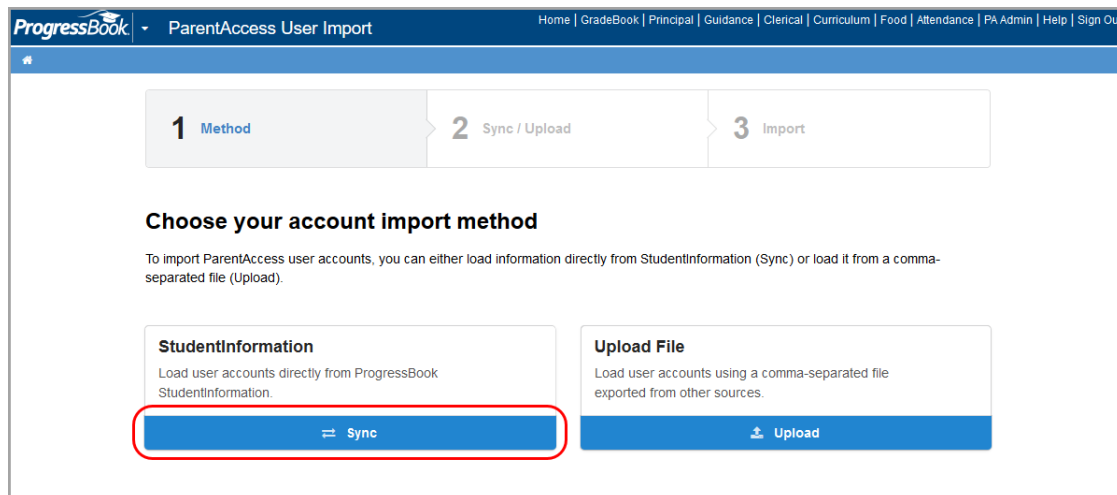
   The **Schools** tab displays.

4. Select the check box for each school from which you want to load accounts.

5. Click **Next**.

Depending on how many records you are importing, the **Loading** message may display on the screen for several minutes before the **Import** tab displays with a count of **New Accounts**, **Updates**, **Errors**, and **Conflicts**.

6. If any errors or conflicts occurred, click **error details** and **warning details** respectively to review the issues prior to importing. If the errors and conflicts are acceptable, proceed to *step 7*.

    Note: User accounts with errors associated will not be created during the import process. If you want these accounts to be created, correct the errors and try again.

7. Click **Import**.
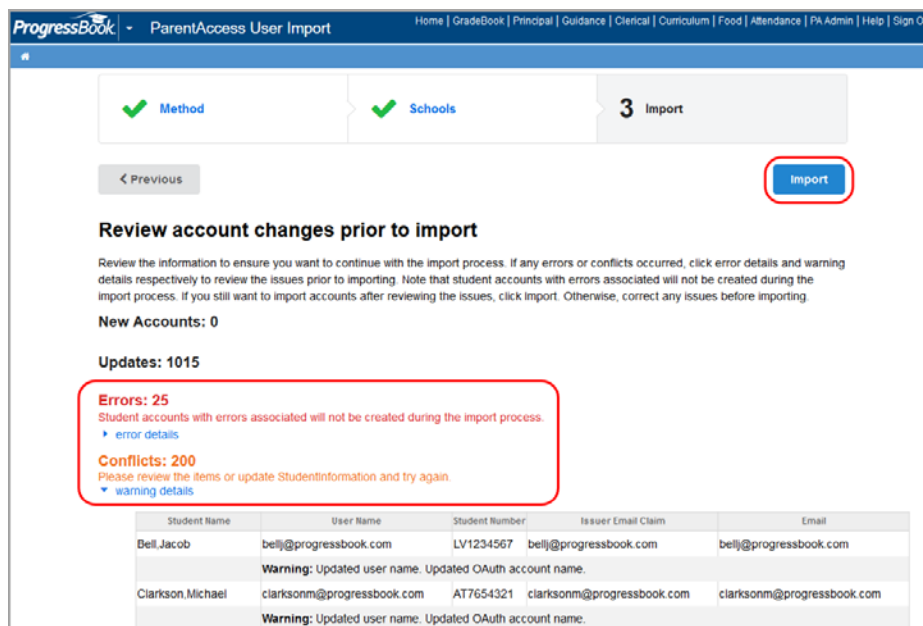
A success message displays. You must enable OAuth sign-in before students can log into ParentAccess using a third-party account. See *"Maintain District Settings."*