

InformationNOW – Home Portal Administration

About this Guide

This Quick Reference Guide provides an overview of the options available for setting up access to the home portal of *InformationNOW*.

Setting Options Accessible from Home Portal

Options can be set to specify what data is visible from the home portal of *InformationNOW*.

Academic Session

Users of the home portal are able to access one or more academic sessions. Only academic sessions that are checked as **Visible in Home Portal** can be accessed. To select the academic sessions that can be viewed from the home portal, perform the following steps:

1. Go to **School/District | School**.
2. Search for and select to **View** the school.
3. Click the *Acad Session* tab.
4. Click to **View** the academic session that is to be available via the home portal.
5. Check the **Visible in Home Portal** box.
6. Click **OK** to save the changes.
7. Repeat for all academic sessions that are to be available via the home portal.

Note: From the *Acad Session* tab, select the **Academic Year** to view academic sessions from previous or future years.

Options by District

To specify items at the district level that may be viewed from the home portal, perform the following steps:

1. Go to **School/District | District**.
2. Click the *Home Access* tab.

Edit District

Summary Main Announcements Custom Enrollment **Home Portal**

Access

Home	Attendance	Demographic
<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Announcements <input checked="" type="checkbox"/> School Calendar	<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Check In/Check Out <input checked="" type="checkbox"/> Details <input checked="" type="checkbox"/> Notes <input checked="" type="checkbox"/> Period Attendance	<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Lunch Code <input type="checkbox"/> SSN
Discipline	Fees	Grades
<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Details <input checked="" type="checkbox"/> History <input checked="" type="checkbox"/> Notes	<input type="checkbox"/> Enabled *No sub-features	<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Activities <input checked="" type="checkbox"/> Details
Reports	Requests	Schedule
<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Comprehensive Progress <input checked="" type="checkbox"/> Progress Report <input checked="" type="checkbox"/> Report Card <input checked="" type="checkbox"/> Standards Report Card <input checked="" type="checkbox"/> Unofficial Transcript	<input checked="" type="checkbox"/> Enabled *No sub-features	<input checked="" type="checkbox"/> Enabled *No sub-features
System Preferences		
<input checked="" type="checkbox"/> Enabled <input checked="" type="checkbox"/> Alerts - Attendance <input checked="" type="checkbox"/> Alerts - Discipline <input checked="" type="checkbox"/> Alerts - Go Green <input checked="" type="checkbox"/> Alerts - Grades <input checked="" type="checkbox"/> Change Password <input checked="" type="checkbox"/> Email		

Settings

Report Card

Report Card Type
Report Card - Down the Page ▼ Display YTD

OK

3. Place a check next to each item that is to be viewed by users of the home portal. For example, to hide Social Security Numbers, uncheck the **SSN** box. To allow users to update their email address, check the **Email** box.

Options by School

To specify items at the district level that may be viewed from the home portal, perform the following steps:

1. Go to **School/District | School**.
2. Search for and select to **View** the school.

- Click the *Home Portal* tab.

The screenshot shows the 'Home Portal' tab selected in a navigation menu. Below the menu are two radio buttons: 'Use the district's Home Portal settings' (selected) and 'Use different settings'. The main content area is divided into several sections:

- Access:** A grid of nine categories, each with an 'Enabled' checkbox and a list of sub-features:
 - Home:** Enabled, Announcements, School Calendar
 - Attendance:** Enabled, Check In/Check Out, Details, Notes, Period Attendance
 - Demographic:** Enabled, Lunch Code, SSN
 - Discipline:** Enabled, Details, History, Notes
 - Fees:** Disabled, *No sub-features
 - Grades:** Enabled, Activities, Details
 - Reports:** Enabled, Comprehensive Progress, Progress Report, Report Card, Standards Report Card, Unofficial Transcript
 - Requests:** Enabled, *No sub-features
 - Schedule:** Enabled, *No sub-features
- Settings:** A section for 'Report Card' with a dropdown for 'Report Card Type' (set to 'Report Card - Down the Page') and a 'Display YTD' checkbox.
- School Settings:** A section for 'Course Requests' with a dropdown for 'Academic Session'.

At the bottom right, there are 'OK' and 'Close' buttons.

- To use settings different from the options at the district level, bullet **Use different settings**.
- Place a check next to each item that is to be viewed by users of the home portal. For example, to hide Social Security Numbers, uncheck the **SSN** box. To allow users to enter course requests, check the **Requests Enabled** box.
 - Course Requests:** Home portal users may be allowed to enter course requests. If the Requests box is enabled, select the Academic Session for which requests are to be entered. For example, if the requests entered via the home portal are for the 2012-2013 school year, select that academic session from the available list.

Note: Review the *InformationNOW – Creating An Academic Session* Quick Reference Guide for details regarding setting up a new academic session.

- Click **OK** to save changes.

Password Reset

The district has the ability to force users to reset their password every set number of days. To set the number of days, perform the following steps:

1. Go to **School/District | Setup**.
2. Click the *Settings* tab.
3. Under the **Password Reset** option, enter the number of days that will pass before the user is forced to reset their password. For example, if a user is required to reset their password every 14 days, enter a 14 in the ***Exclude Days** field.

Granting User Access and Assigning Passwords

Note: Passwords must meet the following criteria:

- Must be a minimum of 8 characters in length.
 - Must contain at least one number and one letter.
 - Must not be the words *password*, *pass*, *word*, *administrator* or *admin*.
 - Cannot be the same as the username.
-

By Individual

To grant an individual student or contact access to the home portal or reset a user's password, perform the following steps:

Student

1. Go to **Students | Student Maintenance**. Search for and select to **View** the student.
2. Click the *Access* tab. Verify that **Account Disabled** is unchecked.
3. If desired, check that the **User must change password at next login**. If desired, check **Password never expires**.
4. If a **User Name** has not been generated, either type a user name in the field provided or click **Generate** to have *InformationNOW* generate a user name. In the fields provided, type and then retype the user's password.
5. Click **OK** to save the changes.

Contact

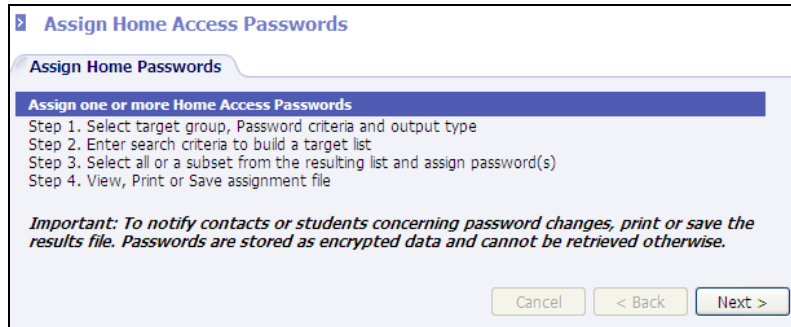
1. Go to **Students | Student Maintenance**. Search for and select to **View** the student.
2. Click the *Contacts* tab. Click to **View** the contact to whom access is to be granted.
3. On the *Main* tab, verify that the **Student is visible in Home Access** is checked.
4. Click the *Access* tab. Verify that **Account Disabled** is unchecked.
5. If desired, check that the **User must change password at next login**.
6. If desired, check **Password never expires**.
7. If a **User Name** has not been generated, either type a user name in the field provided or click **Generate** to have *InformationNOW* generate a user name. In the fields provided, type and then retype the user's password.

8. Click **OK** to save the changes.
9. Verify that the correct students display in the **Home Access Available for the Following Students** list. If not correct, access the records for the student(s) that this person is to have access to and verify the **Student is visible in Home Access** box is checked on the *Main* tab.

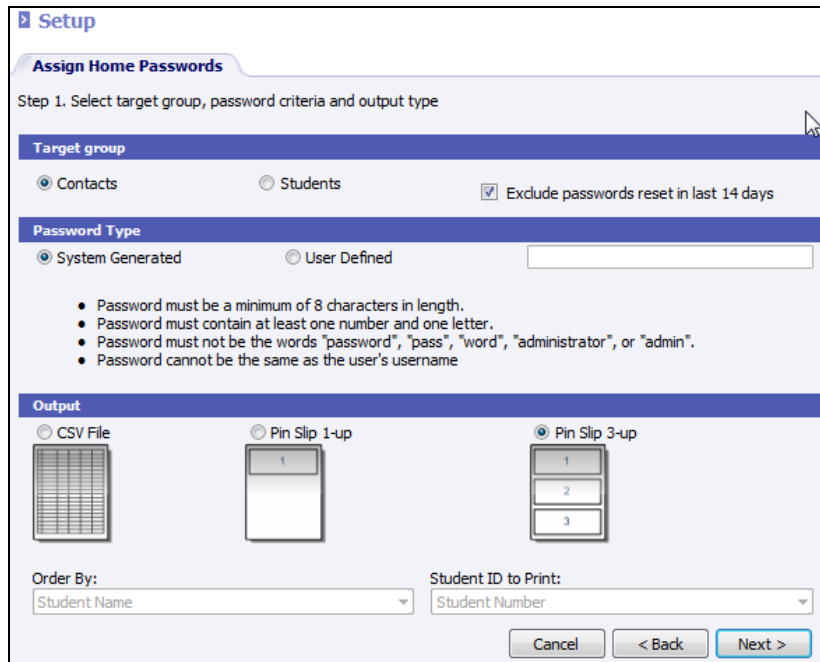
By Group

To generate user names and passwords for a group of students or contacts, perform the following steps:

1. Go to **Utilities | Assign Home Passwords**.



2. Review the steps listed and click **Next**.
3. Select the desired criteria:



- **Target Group:** Select to create passwords for student **Contacts** or **Students**. To exclude any students or contacts who reset their password in the last 14 days, check the **Exclude passwords reset in last 14 days** box.
- **Password Type:** Select if the system is to generate passwords or if users are to be assigned a user-defined password.

- **System Generated:** A unique password will be automatically generated for each member of the selected target group.
- **User Defined:** If selected, enter the user defined password in the field provided. This password will be assigned to each member of the selected target group.
- **Output:** Since passwords are encrypted and may not be retrieved, it is strongly recommended that users select and print at least the CSV file to be able to view user logins.
 - **CSV File:** A CSV file will be created containing the School Number, Student Number, Last Name, First Name, Middle Name, Username, Password, Phone and Mailing Address.
 - **Pin Slip 1-up:** A one-page-per student PIN slip containing the user name and password.
 - **Pin Slip 3-up:** A three-per-page PIN slip containing the user name and password.
- **Order By:** If assigning student passwords, select the order by which to print the students. Select *Grade, Homeroom, Postal Code, Student Name* or *Student Number*.
- **Student ID to Print:** If assigning student passwords, select the student ID to print in the CSV file or pin slips. Select *Alternate Student Number, None, Social Security Number, State Student Number* or *Student Number*.
- Click **Next**. If generating for contacts, the following search screen will display.

Assign Home Passwords
Step 2. Enter criteria to build a list of contacts

Personal		
First Name:	Last Name:	
<input type="text"/>	<input type="text"/>	
Date of Birth:	Gender:	
<input type="text" value="MM/dd/yyyy"/> ...	<input type="text"/>	
Social Security Number:	Phone:	
<input type="text"/>	<input type="text"/>	
File No.:		
<input type="text"/>		
Address		
Address Line 1:		
<input type="text"/>		
Address Line 2:		
<input type="text"/>		
City:	State:	Zip Code:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Student Contact Criteria:		
<input type="checkbox"/> Primary Family Member	<input type="checkbox"/> IsCustodian	Relationship
<input type="checkbox"/> Extended Family Member	<input type="checkbox"/> Non-Family Member	<input type="text"/>
		<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value=" < Back"/> <input type="button" value=" Next >"/>		

- If generating for students, the following search screen will display.

- Enter the search criteria for the desired group and click **Next**.
- A search result screen will display. Use the > or >> arrows to move people who are to be assigned a password to the right hand side of the screen.

- Click **Assign**.

Users will be assigned a unique password. A report will be generated (*CSV, 1-up pin slip or 3-up pin slips*) based on the option selected on the first screen. Select to **Open** or **Save** the report file.

Announcements

Announcements may be set to display for users of the home portal of *InformationNOW*.

To set announcements as visible in home portal, perform the following steps:

1. Go to **School/District**. To set a district-wide announcement click **District**. To set a school-wide announcement, click the **School** menu and search for a school.
2. On the *Announcement* tab, click to **View** an existing announcement or click to **Add** a new announcement.
3. Click the *Audience* tab.
 - **Guardian**: Check if the announcement is to be viewed by non-student users of the home portal such as parents or guardians.
 - **Student**: Check if the announcement it to be viewed by students when they access the home portal.