PORTFOLIO ADMINISTRATOR'S TOOLS

User's Guide

Take Charge of Your Future

bridges.com

INTRODUCTION

Welcome to Portfolio Plus™ Administrator's Tools. We've designed this management system to save you time and make your work easier!

Portfolio Plus itself allows your students to store their planning and other career- and education-related information in a single, secure location that's always available to them online.

Students can generate great-looking and complete resumes using their own portfolio data — and eventually their portfolios will be able to move with them from high school to college, or into the working world.

With the addition of the administrator's tools, you now have a much greater ability to manage your students' electronic portfolios.

The tools are very powerful and easy to use. There's even detailed help right there on the screen to guide you.

As a Portfolio administrator, you can:

- Effectively manage career and personal planning information for all your students
- Search through all students' portfolios to find only the ones you need
- View, report and act on portfolio information stored by one, several or all your students — and choose them by a variety of criteria

  For example, you can generate a report containing the portfolio information of all students in Grade 10 who have expressed interest in journalism and broadcasting. Then, you can use the Messaging tool to send each of these students a message advising them that the school is starting a journalism club.
- Easily manage passwords for students
- Delete portfolios when necessary
- **Transfer portfolios from your school to any other Portfolio Plus system**
- Communicate with students through their portfolios
- Directly receive messages from Bridges.com support staff
- Receive general Portfolio Plus announcements and other important service bulletins from Bridges.com

Can't wait to try it all out? Turn the page and learn all about the tools!

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Do you have comments or questions about using Portfolio Plus or the Administrator's Tools? **Call Bridges.com Customer Support at 1-800-281-1168.** We can help!

The Portfolio Plus™ system contains two main parts: the Student Portfolio section, and the Portfolio Admin Tools section. This guide applies only to the Portfolio Admin Tools section.

You may find it helpful to print a copy of this guide to refer to as you explore the various tools.

GETTING STARTED

1. Open your Internet browser (such as Netscape or Internet Explorer) and go to http://cx.bridges.com.
2. Choose the button for your region and log in, if necessary.
3. Choose Professional.
4. You are now in the Professional section. The Professional News page will be displayed.
5. Click the Portfolio Admin button at the top of the page.
6. Read through the features and click on Register for Administration. Carefully read through the Terms of Service agreement. Note: This is not the same agreement used by students.
7. Fill out the Registration of Acceptance form.
8. Click either "I Accept" or "I Decline."
9. You will be asked to choose an administrator login name and administrator password. Keep these confidential. You'll use these each time you want to enter the Portfolio Admin Tools side of Portfolio Plus.
10. Once you have chosen your Portfolio administrator login name and password, you will automatically see the Messaging screen. You'll receive a message from Bridges.com containing your new administrator login name and administrator password. We'll also include a new School ID and School Key. These should be given to students to add to their personal portfolios, giving you administrative access to their portfolios.

    PRINT THE WELCOME MESSAGE AND KEEP IT IN A SAFE PLACE!

    Your browser's cache will not keep a copy of the page with your administrator login name, password, School ID and School Key — the vital information on this page is gone when you go to any other page. So please print it out before going any further.

IMPORTANT: Before you can access a student's portfolio, you'll need to ask students to enter the new School ID and School Key information in their portfolios.

Be sure to enter registration information correctly — remembering that login names and passwords are "CaSe SeNsiTivE."

TIP: You'll know you're in the Portfolio administrator's side of Portfolio Plus whenever you see the word "Admin" used as a motif behind the toolbar.

OVERVIEW: THE TOOLS

There are three main tools available to administrators in the toolbar: Messaging, Reporting and Admin Tools. You can move from one tool to another simply by clicking the toolbar on the left side of the window.

The **Back** button will return you to the previous screen.

Messaging allows you to read personal messages and general bulletins from Bridges.com.

Reporting allows you to define which students' portfolios are viewed.

Use **Admin Tools** to change your password or students' passwords or transfer or receive portfolios.

The **Help** button takes you to an online version of this user's guide.

Close Admin takes you out of the Portfolio administrator's side of Portfolio Plus.

Each tool offers at least two options, displayed in tabs at the top of the screen. For example, Reporting lets you pick from either Portfolio Search or Portfolio List.

TIP: If a student attempts to change his or her password, they'll need to know their current password to do so. However, using the Admin Tools, a Portfolio administrator can change a student's password without providing the current password information. This is useful in situations where a student has forgotten a password and has come to you for help.

Create a Portfolio for Yourself!

If you really want to become familiar with the way new portfolios are created, consider creating a new portfolio for yourself.

MESSAGING

Incoming Messages

Selecting the Incoming Messages tab will show you incoming personalized messages sent specifically to you by Bridges.com's support staff. This is also where you'll receive copies of your own messages to students, if you chose that option in the Send Message area.

Click on a message's title to read the message.

Message lists show you the following information about each message:

- **From:** the person who sent you the message
- **Date:** the date the message was sent to you
- **Title:** the name of the message. For effective communications, message titles should be short while accurately describing the subject of the message.

If there are no new messages, you'll see a note saying, **"**You have no incoming messages."

If you have any unread messages, a list of messages will be shown to you when you first enter the Portfolio Plus Admin Tools area.

Admin Bulletins

Selecting the Admin Bulletins tab shows you a list of general messages sent by Bridges.com's support staff to all Portfolio Plus administrators. You'll receive important information and updates about new and interesting features of CX Online™ and Portfolio Plus.

Choosing Students, Writing and Sending Messages to Them

The following Messaging Tools are used to define a list of students you'd like to contact with a message. You can choose the students, view the list, make changes to the list and finally, compose your message and send it to the students.

TIP: When you define a list of portfolios in either Messaging or Reporting tools, that list remains active until you alter it. How is this useful? It means you can choose a particular list in Reporting, then simply go to Messaging, compose a message and send it to everyone on the current list.

Search for Message Recipients

Using this tool, you can choose which personal details and career preferences to use as criteria for selecting a list of students to receive your outgoing message.

EXAMPLE:

If you want to send a message to all Grade 10 students interested in journalism and broadcasting, you would:

- Leave all the personal details empty except for the "Grade From" and "Grade To" fields
- Enter "10" or choose "10" from the Grade Level Range pop-up lists. (If you only select a grade in the Grade From list, but leave Grade To empty, your list will include matching students in Grade 10 and up.)
- Scroll down to the Career Preferences lists
- Check the box next to Journalism and Broadcasting

The portfolios listed in your report will be limited to those students who have selected at least one of the careers you have selected. Remember, at any time you can clear your entries in Personal Criteria or Career Preferences by pressing the Clear Personal Criteria or Clear Career Preferences button.

NOTE: Searching without selecting any criteria will result in a list of all portfolios. If you enter only a lower limit in a date or grade field, the system will include all portfolios matching this limit and above. This means if you enter "9" in a grade lower limit field, but leave the upper grade limit field empty, the system will search portfolios of students in Grade 9 and up.

When you're ready to take a look at the list of students you'll be messaging, press the Save Report button, then go to the Recipient List section in the tab bar.

Recipient List

This tool allows you to see the list of portfolios that will receive your message, based on the information you provided using the Recipient Search tool. You can review the list of recipients returned by your search criteria. These are all the portfolio owners who will receive your message when you send it.

You can add or remove individual portfolios from the recipient list by checking or unchecking the boxes beside them. By default, all boxes are checked when your recipient list is first displayed. Use the Select All or Deselect All buttons as quick ways to change the status of each selection box. When you're happy with the list, press the Save Selection button. Your list will be refreshed to display only the portfolios that will actually receive your message, and the count of portfolios currently selected will be updated to reflect your new selection list.

You'll see students listed alphabetically by name, along with their username, unique identifying information (such as a student number) and grade level.

Now that you know who's going to get your message, it's time to actually write your message and send it to your audience.

Send Message

With this tool, you can write a message and send it to the list you created with Recipient Search. If you'd like to have a copy of your message, click on the Send Copy to Yourself button. *This is the only way to keep a record of your message.*

When you choose the Send Message section in the tab bar, you'll see a note saying, "Your message will be sent to (number) personal portfolios."

You can view the recipients in the Recipient List section, or modify the search criteria for the recipient list in the Recipient Search section.

When you are satisfied with the list of recipients, fill in your subject and message text and click the Send Message button. The message will appear in the incoming messages section of each portfolio selected on the recipient list.

TIP: It is important to note that your message is neither saved nor archived. If you want to keep a copy, use your mouse to select the text, then copy it to a blank page in a word processor or notepad application for future reference.

REPORTING

The Reporting Tool contains two tabs:

- Portfolio Search
- Portfolio List

A report can be an individual student portfolio, or a list of many portfolios. The Portfolio Search tab allows you to decide which student portfolios will be included in your report.

Portfolio Search

Using this tool, you can choose which personal details and career preferences to use as criteria for selecting a list of students for your report.

> **EXAMPLE:** If you want to create a report containing information about all Grade 11 students interested in drama, film and video, you would:
>
> - Leave all the personal details empty except for the Grade From and Grade To fields
> - Enter "11" or choose "11" from the Grade Level Range pop-up lists
> - Scroll down to the Career Preferences lists
> - Check the box next to Drama, Film and Video

The portfolios listed in your report will be limited to those students who have selected at least one of the careers you have selected. Remember, at any time you can clear your entries in Personal Criteria or Career Preferences by pressing the Clear Personal Criteria or Clear Career Preferences button.

NOTE: Searching without selecting any criteria will result in a list of all portfolios. If you enter only a lower limit in a date or grade field, the system will include all portfolios matching this limit and above. This means if you enter "9" in a grade lower limit field, but leave the upper grade limit field empty, the system will search portfolios of students in Grade 9 and up.

When you're ready to take a look at your report, press the Save Report button, then go to the Portfolio List section in the tab bar to view your report.

Portfolio List

This tool allows you to view reports about portfolio owners registered to your school.

You can review the list of recipients returned by your search criteria. A short note such as "Total Number of Users: 252" tells you how many people will be included in your report.

You can add or remove individual students from the report list by checking or unchecking the box beside them. By default, all boxes are checked for a new query.

Portfolios are listed alphabetically by student name, along with their username, unique identifying information (such as a student number) and grade level.

Press the Next button at the bottom of the page to see the next page of your report (if there's more than one page).

ADMIN TOOLS

Admin Tools has five tabs:

- Student Passwords
- Admin Password
- Delete Portfolio
- Transfer Portfolio
- Receive Portfolio

Student Passwords

Use this section of Admin Tools to change a student's password.

Students must have login names and passwords to create and modify their personal portfolios. As a Portfolio administrator, you can change any student's password any time by clicking on the Student Passwords tab.

To change a student's password, you must first locate that student's portfolio. Do this by searching Portfolio Plus using any or all of the following:

- The student's first name
- Last name
- Unique identifying information (such as a student number)
- Nickname
- Login name

When you've entered one or more search terms, press Begin Search and a list of students matching your search criteria will be displayed.

To change the password of any portfolio listed in the search results:

1. Press the Change Password button (beside the student's portfolio information). A new window will appear, containing the student's name and two empty text fields:

   - New Password – Enter the new password
   - Re-enter New Password – Enter the new password again

   NOTE: A password must be between six and 25 characters long. It may use letters or numbers, or a combination of both. Passwords are case sensitive, so if you create a password using a capital letter, you will have to enter it exactly the same way to access your portfolio.

2. Press the Change Password button. Portfolio Plus will check to make sure both text fields contain the same password. If they're not the same, an error message will appear and the password will not be changed.

Admin Password

You can change your administrator password with this section of the Admin Tools.

To work with personal portfolios, a Portfolio administrator needs a unique login name and password. You'll use them when opening students' portfolios. You can change your Portfolio administrator's password any time by clicking on the Admin Password tab.

A password must be between six and 25 characters long. It may use letters or numbers, or a combination of both. Passwords are case sensitive, so if you create a password using a capital letter, you will have to enter it exactly the same way to access your portfolio.

Changing Your Administrator's Password

- First, enter your old password
- Enter a new password
- Re-enter your new password to confirm the change
- Click on the Change Password button to apply the change

Delete Portfolio

This section of Admin Tools allows you to delete a student's portfolio.

To delete a student's portfolio, you must first locate that student's portfolio. Do this by searching Portfolio Plus using any or all of the following:

- The student's first name
- Last name
- Unique identifying information (such as a student number)
- Nickname
- Login name

When you've entered one or more search terms, press Begin Search and a list of students matching your search criteria will be displayed.

To delete a portfolio listed in the search results, simply press the Delete Portfolio button (beside the student's portfolio information). A dialog box will appear, asking you to say "Yes" or "No" to deleting the portfolio. If the operation is successful, you will see a note telling you the portfolio has been deleted.

NOTE: Currently, portfolios can only be deleted one at a time — "batch deletions" are not yet possible.

Transfer Portfolio

This new feature of Portfolio Plus Admin Tools lets you transfer a student's portfolio to another Portfolio Plus system -- perhaps at a different school, college or other institution that has Portfolio Plus.

Locating a Student's Portfolio
To transfer a student's portfolio, you must first ask Portfolio Plus to find that student's portfolio. Do this by searching using any or all of the following:

- First identifier (such as student's first name)
- Second identifier (such as student's last name)
- Unique student number
- Nickname
- Login name
- Grade level

When you have entered one or more search terms, press Begin Search and a list of students matching your search terms will be displayed.

To transfer portfolios listed in the search results, simply select the checkbox beside the student whose portfolio you want to transfer. Later, you will choose the destination for these portfolios.

You can now choose from two options: press either the Transfer to a School button or the Transfer to Unknown button.

Transfer to a School
A new window will appear, asking you to search the database for a registered school -- this school will be the destination for the portfolio(s) you are transferring. You can search using any or all of the following:

- CX User ID
- School name
- Administrator's first name
- Administrator's last name
- City
- State or province

When you press the Begin Search button, a list of matching schools will appear. If there are no schools in the list, try searching with different information.

To make the portfolio transfer, simply press the Transfer button beside the name of the school you would like to receive the portfolio(s). A dialog box will appear, asking you to say "Yes" or "No" to the transfer. If the operation is successful, you will see a note telling you the portfolio has been transferred. Press the Continue button to return to the main Transfer Portfolio screen.

Transfer to Unknown
Use this option if the student is leaving your school but doesn't know where they will access their portfolio in the future.

Later, when the student arrives with their valid login name, another school can simply "receive" the student's portfolio from the great unknown by going to the Receive Portfolio tool and pressing Request Search using the student's login name.

Request Release List
If a student moves to another school and you have not yet transferred their portfolio to that school, you may get a request to release the student's portfolio. These requests will appear in your Request Release List.

Enter one or more search terms and press the Begin Search button to find the student's portfolio.
Now, to release a portfolio to another school, simply click on the Release button beside a student's name in this list.

Pending List — Canceling a Transfer
Once you have transferred a student's portfolio to another school, the portfolio is temporarily marked as "Pending." This status changes as soon as the other school officially accepts the portfolio. You can cancel the transfer of any portfolio in this list by pressing the Cancel Transfer button.

If you have transferred a portfolio but it does not appear in this list, then the transfer has been completed and the other school has already officially accepted the portfolio.

Receive Portfolio

This Admin Tools feature allows you to receive a student's portfolio from another Portfolio Plus system — such as a different school, college or other institution that has Portfolio Plus.

Receive List
If students are waiting for you to officially receive their portfolios from another school, they will be visible in the Receive List. Choose the students by clicking the checkboxes beside their student information. Once you have selected the students, press the Receive button.

An option is also displayed for you to view student portfolios that other schools have released without any destinations, during the past 365 days. Selecting this option will also present you with an option to view student portfolios that have been released without destinations, between one and two years ago. Portfolios released without destinations more than two years ago (but haven't been received by another school) will be considered abandoned and will no longer be displayed.

Student Search
If a student arrives at your school with a valid login name, but their former school transferred the student's portfolio to "Unknown," you can get the student's portfolio from the great unknown by typing in the student's login name and pressing the Request Search button.

Request Release
If your search locates a student, you can ask a student's former school to release a student's portfolio by pressing the Request Release button.

Cancel Request
If you have requested another school to release a student's portfolio, but later wish to cancel the request, use the Cancel Request button. You can cancel a request before another school has officially accepted your request.

Portfolio Plus™ Administrator's Tools

FREQUENTLY ASKED QUESTIONS

I am trying to **create a new portfolio** with the School ID and School Key. Why am I getting an **error message?**	**Check the following items to make sure you're using the proper format:** ■ The School ID is **one word** ■ School Key and School ID are "**caSe SeNsitIve"** If typed incorrectly the first time, you will get an error message. That message may be "cached" by your Web browser, which means it could keep reappearing even though it's not supposed to. **Clear your browser's cache**.
I registered as the Portfolio administrator and received a School Key for my school, but I have misplaced the information. Can you tell me what my School ID/School Key is?	**We sure can!** Call your customer support representative at Bridges.com. When you call, you'll need to know your username, school name, administrator's name, city and state.
Are there any changes to the way a portfolio is created?	Yes, minor changes have been made. The use of first and last names has been changed to the use of "unique identifiers," which may or may not be your first and last names — at your choice. Students can now view information about the user agreement by viewing the section entitled, Stuff You Should Know. A link to this information is provided to students at the bottom of the Portfolio Plus student sign-in page.
How much of a student's portfolio can a Portfolio administrator see?	An administrator can see a student's entire portfolio but, for the protection of the student, it is "read-only" — changes can only be made by the student.

There is a lot of personal information in a portfolio. Is it safe to have this information about our students available on the Internet? Is it **private?**	The information contained within a portfolio is not for public display. The information is accessible only with the student's login name and password or by a Portfolio administrator. **The student (end user) is entirely responsible for maintaining the confidentiality of their personal login name and password.** The Bridges.com servers are protected with firewalls and encryption software. Bridges.com is committed to providing a service environment that is safe and secure and is continuously seeking technology that supports that environment. The Portfolio administrator is responsible for ensuring that all minors who create portfolios do so with the permissions required pursuant to the school's own privacy and Internet access policies and restrictions. All minors creating a portfolio must have parental consent. The provision of the School Key by the Portfolio administrator to a minor implies parental consent for that minor to create the portfolio. **Please refer to the Terms of Service agreement for more specific information**.
Who can access my portfolio? How accessible is it to others?	A portfolio is only accessible by the individual with the login name and password and by the Portfolio administrator. The Portfolio administrator has tools for creating new passwords. The end user is responsible for maintaining the confidentiality of their login name and password. If the end user is concerned that their login name and password is known, they should contact their Portfolio administrator to have their password changed. The portfolio system has been designed to automatically close any portfolios that have been opened and **remain inactive** for 15 minutes. Watch the timer in the display bar in the bottom of your browser window. There will also be an indication in the Portfolio toolbar that the portfolio is about to close. A portfolio is considered "active" whenever contact is made with the Bridges.com server.
Can a student create passwords?	Students create their own unique usernames and passwords when they create their portfolios. They can change their own password within their portfolios.
How do students find the password if they forget?	They can't. However, a Portfolio administrator can change the password using the Administrator's Tools.
How long can a student store information in a portfolio?	An indefinite period of time.
Where is the information from portfolios stored?	On Bridges.com's server.
How can a student move their	A Portfolio administrator can request or send a particular student's

portfolio from one school to another — say, from middle school to high school?	portfolio to or from another Portfolio Plus site.
What happens to a student's portfolio once they graduate? Can they access it from home?	Portfolio Plus allows a student's portfolio to follow them beyond high school. If a student has access to the Internet and a subscribing Portfolio Plus site, they'll have access to their portfolio.
Can students or administrators store the information to a disk?	No, for the same reason they cannot store Bridges.com site info on a disk. The portfolios are HTML- and Web-based storage. They do not need to store to a disk as they can access and update the material whenever they are online.
Will there be a way to save previous search criteria?	Eventually. Right now, search criteria are not permanently saved.
Can a Portfolio administrator generate reports on things like interests or grades from a student's profile?	No. They will have to do a search by criteria and then they can run a result list and print the page.
Can a Portfolio administrator go into a student's portfolio to add grades? Can that information be transferred from a Microsoft Excel spreadsheet?	No. At present, Portfolio administrators can't add information as the student portfolios are "read-only."
Can someone at the school district level look at what the Portfolio administrators are doing in their tools?	Not unless the administrator has given access to someone at that level.
How can Portfolio administrators tell if students are using their portfolios?	The only way is to access each individual portfolio and view the activity.
How will Portfolio administrators know if students have opened their mail?	They can look in the student's portfolio and view the status of the student's "envelope" icon for the message. Similar to e-mail, if the envelope icon is closed, the item hasn't been opened or read.

How do Portfolio administrators pick to whom to send the messages? What criteria are required?	A particular list of students can be chosen in Reporting. Once you've selected the portfolios to which you wish to send a message, go to Messaging, compose a message and send it to everyone on the list.
What information will be sent to students from Bridges.com?	Students might receive scholarship information or notes about new features added to the student areas of CX Online or Portfolio Plus.
What kind of support materials have been created for Portfolio administrators?	The Welcome Message from Bridges.com has a link to the Portfolio Plus Administrator's Tools User's Guide. There are also User Updates for basic information about the Admin Tools. You can access all of these from the Professional side of CX Online as well. The User's Guide is available in Adobe Acrobat .PDF format for onscreen reading or printing out. **Extensive help information is also provided onscreen with each item in the Admin Tools system.**
What are the minimum browser requirements for using Portfolio Plus Administrator's Tools?	We recommend using at least Microsoft Internet Explorer 5.0 or Netscape Navigator or Communicator 4.08. The system will work with some earlier browser versions, but they may not be problem-free.
Are there any legal issues with giving out the School Key to other administrative staff, teachers, volunteers, etc.?	It will ultimately be up to the school administrator to register for and keep confidential or give out that information. This is a school policy issue rather than something determined by Bridges.com.
Can Portfolio administrators access the Admin Tools from home as well?	Yes, as long as they have Internet access.
Can administrators make their own portfolio from the admin tools side?	No, this is just an administrative tool section. If a Portfolio administrator wishes to create a portfolio, they can do that by following the procedure for creating a student portfolio.

What can Portfolio administrators do with old manual (i.e. paper-based) portfolios?	You might want to suggest that students input the corresponding information into their electronic portfolio. They can keep the manual one as a reference, or for the storage of items that cannot be turned into electronic information.
Can Portfolio administrators pull information articles directly from the Internet and cut and paste them into students' portfolios?	The text box in the portfolio is a text pad. An easier approach would be for the Portfolio administrator to direct students to a particular URL instead of trying to cut and paste the contents of a URL to each portfolio.
What is the difference between the search functions in (1) Messaging, (2) Reporting and (3) the Admin Tools?	1. The results list in the Messaging section allows you to select or deselect message recipients 2. The Reporting results let you click on a portfolio owner's name to view (read-only) the contents of their portfolio 3. The Admin Tools section allows you to search for a specific portfolio owner — to change their password for them or delete the portfolio from the system
Why do I get an error message when I try to release a student's portfolio after receiving a request to release it?	Before you can release a portfolio (after another school sends a request for you to release it), you must first locate that student's portfolio. <u>If you do not search for a portfolio -- but just click on the box in the Request Release list -- you will get an error message.</u> To avoid the error message, first enter one or more search terms and press the Begin Search button to find the student's portfolio.

Are there questions you'd like to see answered in this section? E-mail Bridges.com at info@bridges.com.