



ADMINISTRATION TOOLS GUIDE

<http://careers.mt.gov>

*The most up-to-date copy of the Admin Tools Guide can be found on MCIS under:
Tools for Teachers & Counselors > Training Materials > Site Administration Guide*

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INTRODUCTION

The Site Administration tools provide you with the ability to customize MCIS for users, manage user needs, and run reports to discover how MCIS is best used.

HOME

Log into the Site Administration Tools

The Site Administrator is the top-level manager of MCIS at your location. When your location first registers with MCIS, they determine what the Site Administrator's username and password are. The username and password give your Site Administrator access to the Site Administration Tools.

1. *Open a new tab in a browser and go to www.careers.mt.gov*
2. *Enter the Site Administrator username and password.*

The Dashboard appears on the home page tab for your site. The Reports, Portfolios & Groups, Other Accounts, Customize, and Helps & Links tabs provide links to the Site Administrator's tools.

Using the Dashboard

The Dashboard contains three reports to help you understand how MCIS is used at your location from a glance. For more information about these reports, refer to the Reports section in this document.

- **Logins.** This report shows how many people have logged into MCIS within the defined date range.
- **Portfolio Accounts.** This report shows how many active portfolios there are at your site.
- **Modules with Saved Reports.** This report shows how many portfolios have saved results from various assessments or exploration tools in MCIS.

Navigate between the Site Administration Tools and the MCIS Website

It can be useful to jump quickly between the Administration Tools and the front-end MCIS website.

1. *When logged in as the Site Administrator, click the Show tab at the top of the screen.*
2. *Click the Go to MCIS button. You are automatically logged into the front end of MCIS.*

To return to the Site Administration Tools, click Show, and select Return to: Site Administration.

TYPES OF ACCOUNTS

Before you begin using MCIS, it helps to understand how accounts are structured. There are four standard types of accounts:

- The Site Administrator has access to all the Administration Tools, can manage all types of accounts, and is the top-level manager of MCIS at your organization.
- The Staff Accounts have access to most of the Administration Tools and are usually created for teachers or counselors at your organization.
- User Portfolio accounts are the regular users of the system, completing assessments, viewing career-related data, and saving information in their portfolios.
- The Site Account is used by students/clients the first time they login. User Portfolios that are created through Site Account credentials are affiliated with that site. Once a User Portfolio is

created, students and clients no longer need to use the Site Account credentials. Portfolio content may be accessible to the Site Administrator and Staff Accounts also affiliated with the site.

Two additional types of accounts can be created to provide access to a specific portfolio:

- Parent Accounts have view-only access of a specific student’s portfolio. A Parent Account cannot view the portfolios of other students. Staff and Site Administrators create Parent Accounts.
- Visitor Accounts have view-only access of a specific User Portfolio account. The Portfolio Users create visitor accounts and define which portfolio content is available to each Visitor.

DASHBOARD - MTCIS DEMO SITE ? Help & Tutorials

Logins

Account Type	Number of Logins since 8/1/2014
Portfolio	240
Site username or IP	136
Staff	5

[Go to full report](#)

Portfolio Accounts

Account Type	Number of portfolios at site
Active Portfolio	37
Portfolios created since 8/1/2014	1

[Go to full report](#)

Modules with Saved Records

CIS Module	All portfolios with saved records	Portfolios with records saved since 8/1/2014
ASSESSMENTS		
Career Cluster Inventory	7	2
IDEAS	9	2
Interest Profiler	5	1

Quick Links

- [Reset Passwords](#)
- [Find a portfolio](#)
- [Curriculum](#)
- [Tools for Counselors & Teachers](#)
- [Portfolio Privacy](#)

REPORTS TAB

You can use the available reports to accomplish various tasks, such as reminding Portfolio Users who saved a particular occupation to their portfolio about a local career event, or reporting on which Portfolio Users have completed their checklists or assessments.

SUMMARY

Portfolio Users save information to their portfolios about assessments, modules, résumés, checklists, or course plans, among many other things. Provided that Portfolio Users have opted-in to sharing information in their portfolios, you can report on saved portfolio content and follow up using messages to remind them to complete assignments.

For more information about Portfolio User privacy and the portfolio opt-in, refer to the Privacy topic later in this document.

REPORT SETTINGS: BEFORE YOU BEGIN

When running reports for your site, it is very important to remember that what you set in the Report Settings applies to all reports under the Reports tab. For example, if you run a report about checklists for a single group of Portfolio Users and then want to run a report to see how many total Portfolio Users at your school have completed various assessments, you must first change the report settings.

You can set the report settings from within any report. Click the Report Settings button in the top-right corner of the report and enter the following information:

- Select the Group, Graduation Year, or Entire Site.
- Select the Date Range.

Once you've picked the report settings you want, click Apply Settings.

The screenshot displays the 'ACCOUNT SUMMARY - MTCIS DEMO SITE' report. The report title is 'ACCOUNT SUMMARY - MTCIS DEMO SITE'. In the top right corner, there are buttons for 'Report Settings', 'Help & Tutorials', and 'Print'. The main content area contains two tables. The first table, 'Portfolio Account Type', has columns for 'Portfolio Account Type', 'Total Number of Portfolios', and 'Number of Portfolio Users Logged in between 8/1/2014 and 6/10/2015' (with sub-columns for 'Number' and 'Percent'). The data rows are: Active Portfolios (37 total, 7 users, 18%), Hidden Portfolios (1 total, 0 users, 0%), Deleted Portfolios (0 total, 0 users, 0%), Total (38 total, 7 users, 18%), and Portfolios created between 8/1/2014 and 6/10/2015 (1 total, 1 user, 18%). The second table, 'Other Account Types', has columns for 'Other Account Types', 'Number of Accounts', and 'Number of Portfolios Related to Other Accounts'. The data rows are: Advisors (3 accounts, 0 related), Parents (4 accounts, 0 related), and Visitors (1 account, 0 related). A 'Report Settings' dialog box is overlaid on the bottom right of the report. It has a title bar 'Report Settings' and contains the following options: 'Select Group or Graduation Year (or Entire Site):' with radio buttons for 'Report by Group: --Select--', 'Report by Graduation Year: --Select--', and 'Report by Entire Site' (which is selected). A note '* = Administered Groups' is next to the 'Report by Group' option. Below this, it says 'Select Date Range:' with 'Begin Date: 08/01/2014' and 'End Date: 06/10/2015'. At the bottom of the dialog are 'Apply Settings' and 'Cancel' buttons.

Portfolio Account Type	Total Number of Portfolios	Number of Portfolio Users Logged in between 8/1/2014 and 6/10/2015	
		Number	Percent
Active Portfolios	37	7	18%
Hidden Portfolios	1	0	0%
Deleted Portfolios	0	0	0%
Total	38	7	18%
Portfolios created between 8/1/2014 and 6/10/2015	1	1	18%

Other Account Types	Number of Accounts	Number of Portfolios Related to Other Accounts
Advisors	3	
Parents	4	
Visitors	1	

HOW TO USE THE REPORTS

Reports are run by modules. A module is any group of data or assessment such as Occupations, Programs of Study, Schools, Checklists, Résumé Creator, Interest Profiler, among others. A report is always run for a particular module and initially shows three things:

1. **All portfolios.** *How many total portfolios at your site contain saved information for that module. For example, how many students have saved results for the Interest Profiler.*
2. **Portfolios in date range.** *How many portfolios matching the criteria defined in the Report Settings contain saved information for that module. For example, how many students from a specific graduation year have saved results for the Interest Profiler.*
3. **Percent.** *The percent of portfolios matching the report settings that have saved information for that module. For example, if there are a total of 400 portfolios with saved Interest Profiler results and 64 match the report settings, the percent is 16%.*

You can subsequently drill down within each report. When you drill down, there are broadly two types of reports:

- **Summary Reports.** These reports show a list of all the items in a module. From here you can select an individual item and see which users saved that item. For example, you can run the Occupations report and then click Select to see which users saved the Physicians occupation to their portfolio.
- **Detailed Reports.** These reports have the option to create either a Summary or a Detailed report. The Detailed report contains more detail and allows you to include more portfolio content. For example, you can use the Interest Profiler report to create a detailed report that contains user results for the assessment. These more detailed reports are found under the Planning Tools and the Assessments sections in the Reports tab.

Run a Report for a Module

When logged in as the Site Administrator, hover over the Reports tab. Click any report name to run the report.

Reports are grouped into seven categories:

1. **Summary.** *These reports are high-level and show the total number of logins for your site and the number of user, staff, and parent portfolios.*
2. **Favorites.** *These reports show which occupations, programs, or schools have been marked as a favorite for a portfolio.*
3. **Stored Files & Links.** *These reports show which Portfolio Users have uploaded résumés, upload files, or saved links.*
4. **Sorts.** *These reports show which Portfolio Users have completed Financial Aid Sort, Occupation Sort, or School Sort.*
5. **Planning Tools (Detailed Reports).** *These reports show which Portfolio Users have used specific planning tools and what portfolio content they've saved.*
6. **Related Accounts.** *These links take you to the Account Summary report.*
7. **Assessments (Detailed Reports).** *These reports show which Portfolio Users have completed assessments and what the assessment results are.*

When running reports, remember to double-check the Report Settings.

Drill Down in a Report

When you initially run a report, you only see a high-level summary of how many portfolios have saved content that meets your Report Settings. To drill down, first run the report for a module, then click the link in the MCIS Module column on the far-left.

For example, run a report for Occupations and drill down:

1. *When logged in as the Site Administrator, hover over the Reports tab and click Occupations. The report for the Occupations module appears.*
2. *In the MCIS Module column on the left, click Occupations. The drill-down report appears. This report contains a list of all the occupations at your site for which Portfolio Users have saved portfolio content.*

If you drill down in a report from the Planning Tools or the Assessments sections, you have the choice of generating a Summary report or a Detail report. If you choose a Detailed report, you can also choose whether it is generated in a print format or an Excel spreadsheet format.

Detailed reports tend to contain saved portfolio content. For example, they might contain a Portfolio User's results from an assessment or a Portfolio User's response to a question in Career Plan.

See Which Portfolios Contain Saved Information

After you drill down in a report, you can see which Portfolio Users have saved a particular item. This feature is particularly useful if you want to message Portfolio Users about an event they might be interested in based on their portfolio content.

For example, run a report on Occupations and drill down to see the list of occupations with portfolio content. To see which Portfolio Users have saved information for an occupation, click the Select link in the Select column on the left. You can now select Portfolio User portfolios and export, print, or send messages.

EXPORT OR PRINT REPORT RESULTS

In every report, you have the option to either export or print the report results. You can export or print the high-level reports, the drill-down reports, and the detailed reports.

To export or print a report, simply click the appropriate link at the top-left corner of the report. For example, run a report for Occupations and click the Occupations link to drill-down. You can print the results by clicking the Print link in the top-left corner of the report.

SEND MESSAGES TO PORTFOLIO USERS BASED ON INTERESTS

At the most detailed level of a report, you can send messages to specific Portfolio Users. Follow the instructions above to drill down in reports and click the Select link, if applicable, to see which Portfolio Users have saved an item. From this screen, you can select Portfolio Users and use the Send Message link to send them an informational message.

Consider the following scenario: there is a local physician who is giving a career informational session about being a physician and you know that some students at your school are interested in medicine.

1. *Run the Occupations report and click the Occupations link to drill down*
2. *Click Select for the occupation of Physicians. The Physicians occupation appears with a list of all the students who have saved this occupation to their portfolio.*
3. *Select the check box in the left-hand column.*

4. Click *Send Message* at the top of the report.
5. Enter your message to the students and click *Send*.

In this scenario, you might also send messages to anyone who has saved similar occupations such as Physician Assistant, Nurse Practitioners, or Occupational Therapists.

Additional applications could be:

- To remind students and clients about scholarship or school deadlines.
- To communicate with students and clients about an upcoming college and university visit or opportunity.

The screenshot displays the 'Reports' section of the MCIS Administration Tools interface. The top navigation bar is red and contains a home icon, 'Reports', 'Portfolios & Groups', 'Other Accounts', 'Customize', and 'Help & Links'. The 'Reports' section is highlighted in a light grey box. Below the navigation bar, the 'Reports' section is divided into several sub-sections:

- Reports**: Get information about site usage, what users are saving to their portfolio, and much more.
- Summary**: Logins, Account Summary, Modules with Saved Records.
- Favorites**: Occupations, Programs of Study, Schools, Show All Favorites.
- Stored Files & Links**: Résumés, Files, Links.
- Sorts**: Financial Aid Sort, Occupation Sort, School Sort.
- Planning Tools**: Application Tracker, Career Plan, Checklist, Course Plan, Résumé Creator.
- Related Accounts**: Advisors, Parents, Visitors.
- Assessments**: Career Cluster Inventory, Entrepreneur's Quiz, IDEAS, Interest Profiler, Reality Check, SKILLS, Work Importance Locator.
- Other Reports**: Peterson's Practice Tests.

PORTFOLIOS & GROUPS TAB

RESET PASSWORDS (PORTFOLIOS & GROUPS TAB)

Occasionally you might need to reset a user password.

Reset Passwords for a Single User or a Group of Users

You can reset passwords for a single user, a parent or guardian, a staff member, a group of users, or a group of users based on graduation year.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab.*
2. *Under Reset Passwords, select Reset Password for One User or by Group or Graduation Year.*
3. *Choose whether to search for a single user by last name, a group of users, a graduation year, or a parent or guardian by last name.*
4. *Click Generate List.*
5. *In the Select column on the left, select the check boxes next to the users whose passwords need to be reset.*
6. *When you've selected the appropriate users, click Reset Passwords.*
7. *Enter a temporary password for the selected users.*
 - *Select the "Reset security questions" check box to also require the users to reset their security questions.*
 - *Select the "Send password to accounts with an e-mail address" to send passwords by e-mail.*

If a user account does not have an e-mail address in it, make sure to notify the person manually of her password change and update her e-mail address in MCIS.

Reset Passwords for Multiple Distinct Users

You can reset passwords for multiple users, regardless of their graduation year or group.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab.*
2. *Under Reset Passwords, select Reset Password for Multiple Users.*
3. *Use the Search Settings button in the top-right to find the user accounts needing passwords reset and select the check boxes next to them. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.*
4. *When you've selected the appropriate users, click Reset Passwords.*
5. *Enter a temporary password for the selected users.*
 - *Select the "Reset security questions" check box to also require the users to reset their security questions.*
 - *Select the "Send password to accounts with an e-mail address" to send passwords by e-mail.*

If a user account does not have an e-mail address in it, make sure to notify the person manually of her password change and update her e-mail address in MCIS.

MANAGING PORTFOLIOS

The Site Administrator and Staff Accounts can view a Portfolio User's portfolio, including the Personal Learning Plan (PLP), progress in completing assignments, and results from career exploration assessments.

To view Portfolio User portfolios, first find the portfolios using either the Find Individual Portfolio or the Search Portfolio links under the Access Portfolios section in the Portfolios & Groups tab.

Find an Individual Portfolio

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Find Individual Portfolio.*
2. *Enter one or more search criteria and click Search.*

The search returns a list of Portfolio Users matching your criteria.

Find Multiple Portfolios

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Search Portfolios.*
2. *Under Select Search Mode, choose whether to search for a single user by last name, a group of users, a graduation year, or all the users.*
3. *Under Select Portfolio Task Mode, select "Do all portfolio tasks."*
4. *Click Generate Portfolio List.*

Note that the search criteria apply to all searches and remain until you change them. For example, these search criteria apply to all the links under the Manage Active Portfolios title in the Portfolios & Groups tab. You can change the search criteria at any point by clicking Search Portfolios under the Portfolios & Groups tab, or by clicking Search Settings under the Do All Portfolio Tasks option.

Send Messages to Users

First, follow the instructions above to either Find an Individual Portfolio or Find Multiple Portfolios.

1. *Select the check boxes next to the portfolios you want to send a message to.*
2. *Click the Send Message link, located at the top of the table.*
3. *Enter the subject and text of the message you want to send.*
4. *Review the list of recipients at the end of the page and click Send.*

View a Student's Personal Learning Plan (PLP)

First, follow the instructions above to either Find an Individual Portfolio or Find Multiple Portfolios.

1. *Once you've found the student's portfolio you want to view, click View in the View column on the far right. A view-only report appears with check boxes.*
2. *On the top of the report, click "Generate Personal Learning Plan (PLP)."*

An Adobe PDF file of the student's PLP automatically downloads. Check the Downloads folder on your computer.

Check a Portfolio User's Progress on Checklists, Assessments, Course Planner, and More

First, follow the instructions above to either Find an Individual Portfolio or Find Multiple Portfolios.

1. *Once you've found the Portfolio User's portfolio you want to view, click View in the View column on the far right. A view-only report appears with check boxes.*
2. *Select the check boxes to view Portfolio User progress on Checklists, Course Planner, Favorites, Sort and Assessments, among others. Note that if a Portfolio User has no saved portfolio content for that check box, it appears as greyed out and you cannot select it.*
3. *Click View Selected Item(s).*

A report appears showing a Portfolio User's progress for the selected items.

Create a Single Portfolio

You can create a single portfolio account for a Portfolio User.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Add One Portfolio.*
2. *Enter the information for the Portfolio User. Though an e-mail address is not required, you should enter one if you have it because it makes re-setting passwords in the future much easier.*
3. *Click Add.*

The portfolio is created and the Search Portfolios screen appears. The user does not receive an e-mail that a portfolio was created for her, so you need to inform her of her username and password. Upon login, the user is required to create security questions and reset the password.

MCIS recommends adding the portfolio to a group to more efficiently manage users.

Create Multiple Portfolios Simultaneously

When preparing for a class or project, it can be useful to quickly create multiple portfolios for many Portfolio Users. To create multiple user portfolios, use the Portfolio Upload Template. If the template is used to create multiple portfolios, then Portfolio Users **do not** have to reset their passwords.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Upload Several Portfolios.*
2. *Click Portfolio Upload Template to download the Excel file. Check the Downloads folder on your computer and open the file.*
3. *Save the Excel file to your computer or network.*
4. *In the Excel file, for each portfolio you want to create, enter the username, password, first and last name, graduation year, and email in an Excel row.*
5. *In MCIS, when logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Upload Several Portfolios.*
6. *Click Choose File and select the Excel file you saved in Step 3.*
7. *Click Upload Portfolios.*

The portfolios are created and a report appears that lists any errors. If any errors appear, click the Status Codes link in the bottom-right of the screen to identify them. Optionally, click the Export Results to Excel link to save the report to your computer.

MCIS recommends adding the portfolio to a group to more efficiently manage users.

Hide Portfolios

You can hide portfolios so that they don't appear in reports. The portfolios can still be used by the owners.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Do All Portfolio Tasks.*
2. *Use the Search Settings button in the top-right to find the user accounts you want to merge and select the check boxes next to them. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.*
3. *From the Select Portfolio Task drop-down menu, select Merge Selected Portfolios.*
4. *Click Execute Task.*

The portfolios you selected in Step 2 are now hidden. To un-hide portfolios, go to the Un-Hide Portfolios topic in this document.

Transfer Portfolios to Another site

You can transfer portfolios to another site when a Portfolio User moves or graduates. To transfer portfolios, you'll need the username and password for the site where you want to transfer the portfolio. It's also a good idea to work with the Site Administrator at the new site before transferring the portfolios.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Do All Portfolio Tasks.*
2. *Use the Search Settings button in the top-right to find the user accounts you want to merge and select the check boxes next to them. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.*
3. *From the Select Portfolio Task drop-down menu, select Transfer Selected Portfolios.*
4. *Click Execute Task. The Transfer Accounts to Another Site screen appears.*
5. *Enter the username and password for the new site.*
6. *Click Continue.*

The portfolios are transferred to the site you entered in Step 5. Make sure to follow up with the user who had a portfolio transferred and the site Administrator for the new site to ensure that the transfer went smoothly.

Merge Portfolios

When a Portfolio User can't find the work she completed in a previous year, it is often because she has two portfolios and isn't aware of it. If a user creates two portfolios, the Site Administrator can merge them. **Note that merging portfolios is final: merged portfolios cannot be un-merged.**

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Do All Portfolio Tasks.*
2. *Use the Search Settings button in the top-right to find the user accounts you want to merge and select the check boxes next to them. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.*
3. *From the Select Portfolio Task drop-down menu, select Merge Selected Portfolios.*
4. *Click Execute Task. The Merge Portfolios screen appears. Verify that these are the portfolios you want to merge.*

5. *Select a primary portfolio by clicking Select in the far-left column. When other portfolios are merged into the primary portfolio, data in the primary portfolio has precedence. For example, all portfolios must have a username and password, so the username and password from the primary portfolio remain while the others are deleted.*
6. *Click Continue. You may have to click Okay and Continue again to finalize the merge.*

The portfolios are merged and the portfolio search results appear.

MANAGE HIDDEN AND DELETED PORTFOLIOS

Occasionally, you might need to un-hide or un-delete a portfolio.

Un-Hide Portfolios

1. When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click View Hidden Portfolios.
2. Select the check boxes next to the users whose portfolios you want to un-hide. To find users, enter the last name of the user whose portfolio you want to un-hide and click the Click to Search button.
3. Click Unhide Selected Portfolios.

The portfolios are now unhidden and can be found by clicking Search Portfolios under the Portfolios & Groups tab.

Un-Delete Portfolios

1. When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click View Deleted Portfolios.
2. Click Restore for each portfolio that you want to un-delete.

The portfolios are now un-deleted and can be found by clicking Search Portfolios under the Portfolios & Groups tab.

The screenshot shows the 'Portfolios & Groups' tab selected in the navigation menu. The main content area is divided into several sections:

- Maintain Portfolio Accounts & Groups**: Includes options to 'Reset passwords', 'Find, manage, and add portfolios', and 'Create and maintain groups'.
- Reset Passwords**: Includes 'Reset Password for One User or by Group or Graduation Year' and 'Reset Passwords for Multiple Users'.
- Access Portfolios**: Includes 'Find Individual Portfolio' and 'Search Portfolios'.
- Add Portfolios**: Includes 'Add One Portfolio' and 'Upload Several Portfolios'.
- Manage Active Portfolios**: Includes 'View, Edit, Show Files, Reset Password(s)', 'Reset Password(s)', 'Hide Portfolios', 'Transfer to Another Site', 'Merge Portfolios', 'Assign an Advisor', 'Create or Edit a Parent Account', 'Activate Assigned Checklists', and 'Do All Portfolio Tasks'.
- Manage Hidden and Deleted Portfolios**: Includes 'View Hidden Portfolios' and 'View Deleted Portfolios'.
- Maintain Groups**: Includes 'Add New Group', 'Edit or Delete a Group', and 'View or Edit Group Membership'.

MAINTAIN GROUPS (PORTFOLIOS & GROUPS TAB)

You can create and edit groups of users to more efficiently manage users. This allows you to quickly run reports on a group of users, assign checklists to that group, or reset passwords for the entire group, among other things.

MCIS highly recommends that you create groups to efficiently manage users.

Create or Edit a Group

Before you create a group of users, first check to see if that group already exists. For example, if you're creating a group for a counselor's class called John Doe Fall 2014, first make sure that a similar one such as "John's fall class" or "Mr. Doe's 2014 group" doesn't already exist.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click Edit or Delete a Group.*
2. *Check the list of groups to make sure that a similar group doesn't already exist. If it does exist, click Edit in the Edit Command column for that group and modify the name.*
3. *If a similar group doesn't already exist, hover over the Portfolios & Groups tab and click Add a New Group.*
4. *Enter a name for the group and click Add.*

The Edit Group Membership screen appears and you can begin adding members to a group.

Assign a User to a Group

Creating groups and assigning users to the groups is the best way to manage users at your site.

1. *When logged in as the Site Administrator, hover over the Portfolios & Groups tab and click View or Edit Group Membership. The Edit Group Membership screen appears.*
2. *From the Group Name drop-down field, select the group whose membership you want to edit.*
3. *Click Add Accounts to Group. In the search options screen that appears, choose whether to search for Portfolio Users by Last Name, Graduation Year, or to list all users in the site.*
4. *Click Generate List of Portfolios. A list of Portfolio Users matching your search criteria appears.*
5. *Select the check boxes next to the users who you want to add to the group.*
6. *Click Add to Group.*

The users are added to the group and the group's current membership appears on the Edit Group Membership screen.

OTHER ACCOUNTS TAB

MAINTAIN STAFF ACCOUNTS (OTHER ACCOUNTS TAB)

Only the Site Administrator can create and manage Staff Accounts for staff members at a location. A Staff Account has some administrative capabilities such as generating reports, creating, transferring, and viewing the contents of individual portfolios, creating and managing groups, sending messages to students or clients, uploading portfolios, and viewing checklists.

Reset Passwords for Staff Members

If a staff member forgets her password, she can reset it by clicking “Forgot your username or password?” on the login screen, entering her username, and answering her security questions. If she doesn’t remember the answers to her security questions, the Site Administrator can reset her password.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click Reset Password for Staff Accounts.*
2. *Find the account that needs resetting and click Reset in the Password column.*
3. *Enter a temporary password for the Staff Account. To automatically send the temporary password to the staff member, select the check box “Send password to [email].” If a staff member does not have an email on file in MCIS, this check box does not appear.*

Upon login, the staff member is required to create security questions.

Retrieve Usernames for Staff Members

If a staff member forgets her username, she can retrieve it by clicking “Forgot your username or password?” on the login screen, then clicking Go under Request Username, and entering her e-mail address. If she does not have an email address, the Site Administrator can enter one for her and she can retrieve her username.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click View or Edit Staff Accounts.*
2. *Find the staff member’s account. While it’s possible to directly give the staff member her username, MCIS recommends entering an e-mail address for the staff member and asking her to follow the process for retrieving her username. This generally helps staff remember their usernames in the future.*
3. *Click Edit in the Edit column for the staff member’s account.*
4. *In the E-mail field, enter the staff member’s e-mail address.*

Inform the staff member that she can follow the process for retrieving her username from the login screen for MCIS at www.OregonMCIS.uoregon.edu.

Create a Staff Account for a Staff Member

Before creating a new Staff Account, always check to see if that person already has a Staff Account.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click View or Edit Staff Accounts.*
2. *Verify that an account does not already exist for the person whose account you want to create.*
3. *If an account doesn’t exist, hover over Other Accounts and click Add New Staff Accounts.*

4. *Enter the person's Username, Password, First Name, Last Name, and E-mail.*
5. *Make sure the Automated e-mail? Check box is selected and click Add.*

Edit a Staff Member's Name or Username

The Site Administrator can change a staff member's name or username. While this function is not often used, it is useful if, for example, a staff member marries and desires to change her last name.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click View or Edit Staff Accounts.*
2. *Click Edit in the Edit column for the staff member's account.*
3. *Make the appropriate changes in the First Name, Last Name, or Username fields.*

If you change a staff member's username, make sure she knows what it is.

MAINTAIN PARENT ACCOUNTS (OTHER ACCOUNTS TAB)

Both the Site Administrator and staff members with Staff Accounts have the ability to create and edit Parent Accounts. A Parent Account gives a parent limited access to a specific student's portfolio. A parent can view the student's Personal Education Plan (PEP), progress in completing assignments, results from career exploration assessments, as well as send secure messages to teachers or counselors at your location. A Parent Account can never edit a student's content.

The Site Administrator should communicate with staff members about who is responsible for creating and maintaining parent accounts.

Customize Your School's Introduction to Parent Accounts

Whenever a parent logs into her account, she sees an introduction from your school. You can customize the introduction to be more personal and informative.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click Set Parent Account Introduction.*
2. *In the Introduction field, enter the message you want to appear to parents.*

Remember that this introduction appears every time a parent logs into her account, so it's a good idea to make sure the text will make sense after multiple logins or after multiple months.

Create a Single Parent Account

To give a parent view-only access to her child's portfolio, create a parent account associated with the child's account. If you want to create multiple Parent Accounts at one time, go to the Create Multiple Parent Accounts Simultaneously topic in this document to find out about Parent Account Upload Templates.

1. *When logged in as the Site Administrator, hover over the Other Accounts tab and click Create or Edit a Parent Account or Parent Account Upload Template.*
2. *Use the Search Settings button in the top-right to find the child accounts that need parent accounts. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.*
3. *Click Create in the Parent Column. If a Parent Account already exists for that student, the Edit link will appear instead.*
4. *Click Add New Parent Account.*

5. Enter the parent's Username, Password, First Name, Last Name, and E-mail.
6. Make sure the Automated e-mail? Check box is selected and click Add.

Create Multiple Parent Accounts Simultaneously

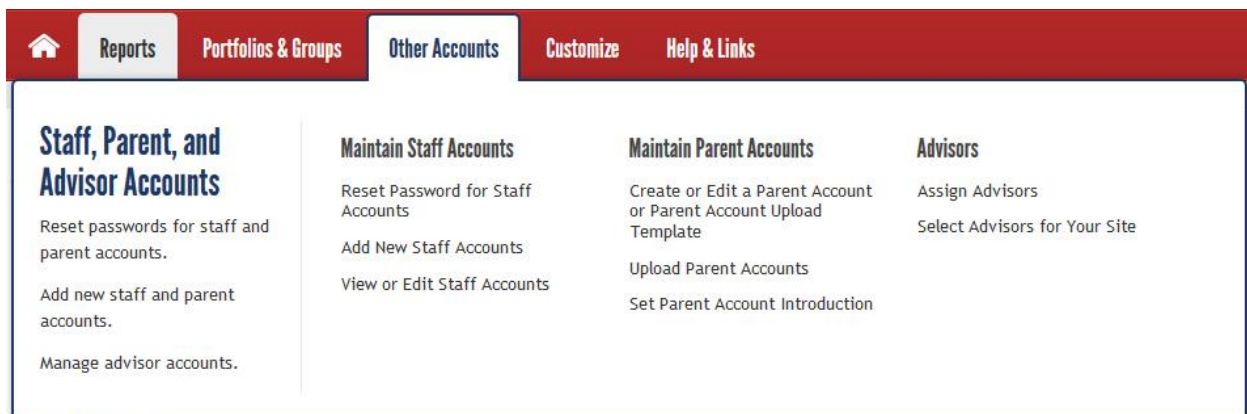
To create multiple parent accounts, use the Parent Account Upload Template.

1. When logged in as the Site Administrator, hover over the Other Accounts tab and click Create or Edit a Parent Account or Parent Account Upload Template.
2. Select the check boxes next to the users for whom you want to create parent accounts.
3. Click Create Parent Account Upload Template. An Excel file automatically downloads. Check the Downloads folder on your computer and open the file.
4. Save the Excel file on your computer or network.
5. In the Excel file, for each student, enter the parent's username, password, first and last name, and email.
6. In MCIS, when logged in as the Site Administrator, hover over the Other Accounts tab and click Upload Parent Accounts.
7. Click Choose File and select the Excel file you saved in Step 4.
8. Make sure the "Automated e-mail?" check box is selected and click Upload Parents.

Edit a Parent Account

To edit a Parent Account, you need to access the account through the associated child account.

1. When logged in as the Site Administrator, hover over the Other Accounts tab and click Create or Edit a Parent Account or Parent Account Upload Template.
2. Use the Search Settings button in the top-right to find specific child accounts. Note that the search criteria you set in the Search Settings apply to all searches and remain until you change them.
3. In the Parent column, click Edit to edit the Parent Account for that child. If a parent account doesn't exist for the child, click Create to create a new one.



Customize Tab

The topics under this tab help you customize how MCIS is used at your location, include the Checklists, and the Course Planner.

CHECKLISTS

Checklists allow Portfolio Users and users to see a list of activities you or a staff member would like them to complete and track their progress as they complete their work. For the checklist status to be marked as complete, all the required activities in the checklist must be completed.

MCIS provides several default checklists that you can duplicate and modify. These default checklists are a good place to start when first learning how to use checklists, or if you want to reduce your work when creating checklists from scratch. MCIS recommends that you look at how checklists appear in the system and plan out your own checklists before creating them.

When making changes to checklists, remember to click the Update button to save your changes before moving to another screen. To go back to a previous screen after clicking Update, click the Return button in the top-right corner of the screen.

View Checklists

Before you create custom checklists, review the MCIS Default Checklists to see what they include and how they're structured. You can easily duplicate and modify these checklists, so becoming familiar with them is a good idea.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *Scroll down to the Default Checklists section. Use the View link to look at a checklist. This is how you can view any checklist.*

In the Checklist Viewer, a description of the checklist appears. Scroll down to the checklist activity table to see what activities are required for this checklist.

- **Required column.** This column shows whether an activity in the checklist is required or not.
- **Minimum Number of Entries.** This column tells you how many times a user must complete a particular activity for that activity to be marked as finished.
- **Minimum Number of Words.** This column tells you the minimum number of words a user must type in their personal response before the activity is marked as finished.
- **User Review Required.** This column tells you whether the user must review the activity before it is marked as finished.
- **Parent Review Required.** This column tells you whether the user's parent must review the activity before it is marked as finished.
- **Staff Review Required.** This column tells you whether a staff member must review the activity before it is marked as finished.

Create a Custom Checklist

Often the best way to create a custom checklist is to find a MCIS Default Checklist that most closely matches your needs and then duplicate and modify it.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *Scroll down to the Default Checklists section. Use the View link to look at the default checklists and choose which one you want to duplicate.*
3. *Once you’ve found a checklist to use, click Duplicate in the Duplicate column.*
4. *In the Visible Site Checklists section, find the checklist you duplicated.*
5. *Click Edit.*
6. *In the Checklist Name field, modify the name to reflect your custom changes. This helps you find the checklist later. For example, if you’re creating a Getting Started Checklist for 9th graders, you might name it “Getting Started for John Doe’s 9th Grade.”*
7. *In the Linked Default Checklist drop-down menu, select “--None--”. If you want to modify the activities within a checklist, you must unlink the checklist from the MCIS Default Checklist. If you don’t unlink your custom checklist from the default one, you cannot edit the default activities.*
8. *Click Update.*

Edit a Custom Checklist

Checklists are highly modifiable. You can add different activities to a checklist, choose which activities are required or optional, as well as modify the introductory message, the teacher message, and the supporting documents. After adding activities to a checklist, you can then modify the requirements for each individual activity. The following instructions tell you where to make these changes, however, MCIS recommends that you first look at how checklists appear in the system and plan out which activities you want to use in a checklist.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *In the Visible Site Checklists section, find the checklist you want to edit and click Edit.*

The Edit Site Checklist screen appears. From this screen you can make edits to the checklist and what activities are included in that checklist.

Re-order Checklists

The Sequence Number determines the order of checklists in your site. Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *In the Sequence Number field, enter a number to determine where the checklist appears in the order of checklists. (1 appears first, 2 second, etc.) Click Update.*
2. *Repeat Step 1 for every visible checklist to determine the order in which checklists appear.*

Re-Name a Checklist

Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *In the Checklist Name field, enter the new name of the checklist.*
2. *Click Update.*

Hide and Un-Hide a Checklist

Hiding a checklist removes it from appearing in the system. Hide checklists if they’re obsolete or still in the process of being edited.

1. *When logged in as the Site Administrator, hover over Customize tab and click Create, Edit and Export Checklists.*
2. *Under the Visible Site Checklists section, find the checklist you want to hide and click Hide in the Site Visible column.*

To un-hide a checklist:

1. *When logged in as the Site Administrator, hover over Customize tab and click Create, Edit and Export Checklists.*
2. *On the right, click Show Hidden Site Checklists.*
3. *Find the checklist you want to unhide and click Unhide in the Site Visible column.*

Unlink a Custom Checklist from a Default Checklist to Enable Activity Editing

In order to edit activities in a custom checklist, you must first unlink the checklist from any MCIS Default Checklists. Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *In the Linked Default Checklist drop-down menu, select "--None--".*
2. *Click Update.*

Add a Custom Introductory Message about Checklists

You can write a message that appears to Portfolio Users who use checklists and another message that appears only to teachers and counselors. Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *Click Edit in the Introductory Text and Message for Teachers/Counselors section.*
2. *Enter your custom checklist message for Portfolio Users in the first field.*
3. *Enter your custom checklist message for teachers and counselors in the second field.*
4. *Click Update.*

Add Supporting Documents for a Checklist

Give teachers access to extra instructions or a printable handout. Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *Click Edit in the Supporting Document(s) section.*
2. *Click Add Supporting Document. The Upload Files screen appears.*
3. *Click Choose File and select the file from your computer or network that you want to use.*
4. *In the File Description field, enter a short note about the file.*
5. *In the Sequence Number field, enter a number to determine where in the order of supporting documents it appears.*
6. *Click Upload. A text report appears on screen.*
7. *Click Done.*

Edit Checklist Activities

A custom checklist allows you to modify which activities appear in that checklist, whether they're required or optional, how much work a Portfolio User is required to put into them, and whether user, parent, or staff review is required. You can also add custom checklist activities, such as completing the FAFSA.

Follow the instructions in the Edit a Custom Checklist topic to get to the Edit Site Checklist screen.

1. *From the Edit Site Checklist screen, scroll down to the Edit Activities table.*
2. *To edit an activity, click Edit in the Update column for that activity.*

The Edit Checklist Activity screen appears. From this screen you can modify the requirements for specific activities in a checklist.

Require a Minimum Number of Words for an Activity Response

Encourage students to reflect on an activity by requiring a minimum number of words in their response. Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Minimum Number of Words field, enter the number of required words.*
2. *Scroll to the bottom of the screen and click Update.*

Require a Minimum Number of Entries for an Activity Response

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Minimum Number of Entries field, enter the number of required entries.*
2. *Scroll to the bottom of the screen and click Update.*

Re-Order Activities

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Sequence Number field, enter a number to determine where the activity appears in the order of activities. (1 appears first, 2 second, etc.)*
2. *Scroll to the bottom of the screen and click Update.*

Enter a Custom Description for an Activity

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Activity Description field, enter a custom description for the activity.*
2. *Scroll to the bottom of the screen and click Update.*

Create a Custom Label for an Activity in the Checklist Activity Report

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Short Label field, enter a custom label for the activity. This label appears as the title of the activity in the Checklist Activity report.*
2. *Scroll to the bottom of the screen and click Update.*

Create a Custom Help Message

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *In the Help Message field, enter a custom help message. The message appears to users completing the activity. Note that whatever text you include must be between the <p> and </p> tags to ensure that it displays correctly in the system.*
2. *Scroll to the bottom of the screen and click Update.*

Choose Whether an Activity is Required or Optional

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *Scroll down to the Optional check box. To make an activity required, leave the check box blank. To make an activity optional, select the check box.*

2. *Click Update.*

Require User, Parent, or Staff Review

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

1. *Scroll down to the Checklist Activity Review Options section.*
 - *Select the “User Review and Check Required?” check box to require user review before the activity is marked as finished.*
 - *Select the “Parent Review and Check Required?” check box to require parent review before the activity is marked as finished.*
 - *Select the “Staff Review and Check Required?” check box to require staff review before the activity is marked as finished.*
2. *Once you’ve set the requirements you want, click Update.*

Add a Custom Link for an Activity

Follow the instructions in the Edit Checklist Activities topic to get to the Edit Checklist Activity screen.

3. *Scroll down to the Link for Checklist Activity section.*
4. *In the Link Text field, enter a title for the link.*
5. *In the Link URL field, enter the web link.*
6. *Click Update.*

Assign and Activate Checklists for Portfolio Users

Before Portfolio Users or users can see checklists, you have to assign the checklists to them and activate the checklists. Using groups of users when assigning checklists is more efficient than assigning them one-by-one. For more information about how to use groups to effectively manage users, refer to the Maintain Groups section.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *In the Visible Site Checklists table, find the checklist you want to activate.*
3. *In the Activation Status column for that checklist, click Activation. The Checklist Activation by Group or Graduation Year screen appears. Note that the checklist you selected appears in the drop-down menu at the top of the screen. Use this menu to select other checklists later.*
4. *Choose whether to assign checklists by group or by graduation year and select the appropriate group or graduation year from the drop-down menu.*
5. *Click Assign New.*
6. *In the Activate All column, click Activate. The Checklist Activation screen appears.*
7. *Optionally, select additional checklists to activate for this group or graduation year.*
8. *Click Activate Checklists.*

Checklists are now assigned and assigned for this group or graduation year. To assign and activate more checklists, start from Step 3 above, select another checklist, and follow the instructions.

Mark a Checklist Activity as Complete for Students

If students complete an activity on paper, you can mark the activity as complete in the checklist for those students. This helps track student progress in completing checklist requirements.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *Choose the checklist that contains an activity you want to mark as complete and click Reports for that checklist. The Checklist Reports screen appears.*
3. *Select the Checklist Activity Report at the bottom and click Generate Report. The Checklist Activity Report screen appears.*
4. *Select the activity in the left-hand column that you want to mark as complete.*
5. *Click Generate Report. A list of students who have been assigned that activity appears.*
6. *Select one or more students and click the Staff Override/Review/Check off link.*
7. *Select the “Add override; mark activity as met” option.*
8. *Click Update.*

At this point, the checklist activity you selected in step 4 is marked as complete for all the students you selected in step 6.

Mark a Checklist Activity as Reviewed by Staff

Some checklist activities require that staff mark them as reviewed after a student completes them. You can mark a checklist as reviewed for multiple students at one time.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *Choose the checklist that contains an activity you want to mark as reviewed and click Reports for that checklist. The Checklist Reports screen appears.*
3. *Select the Checklist Activity Report at the bottom and click Generate Report. The Checklist Activity Report screen appears.*
4. *Select the activity in the left-hand column that you want to mark as complete.*
5. *Click Generate Report. A list of students who have been assigned that activity appears.*
6. *Select one or more students and click the Staff Override/Review/Check off link.*
7. *Select the “Add staff review check off” option.*
8. *Click Update.*

SHARE CHECKLISTS

You can share checklists with other teachers and counselors at your site or even another school. To share checklists, you need to export them and then e-mail them to the recipient, who can import them into her site. Follow the instructions below to export and import checklists.

Export Checklists

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*

2. *In the Visible Site Checklists table, select the check boxes next to the checklists you want to export.*
3. *Click Export, directly under the Visible Site Checklists title. If a custom checklist is linked to Default Checklist, a pop-up appears asking whether you want to maintain that link. To not maintain the link and export a custom checklist, click Okay. To maintain the link, click Cancel.*
4. *An Excel file automatically downloads. Check the Downloads folder on your computer and open the file. Save a copy to your computer and name it.*

You can send the exported checklist to another teacher, counselor, or administrator at your school or another school. Sharing checklists helps improve quality education across Oregon.

Import Checklists

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create, Edit and Export Checklists. The Checklists – Main Menu screen appears.*
2. *Click Import, next to the Import Site Checklists title.*
3. *Click Choose File and select the Excel file to import. Only checklists that were exported from MCIS will work to be imported.*
4. *Click Import Site Checklists.*

The checklist is imported and a report appears that lists any errors. If any errors appear, click the Status Codes link in the bottom-right of the screen to identify them. Optionally, click the Export Results to Excel link to save the report to your computer.

COURSE PLANNER

Use the Course Planner to track courses at your school and design custom high school pathways that incorporate various courses into a recommended high school pathway. MCIS recommends that you review and update your courses and pathways every term.

Once you've added courses and pathways to MCIS, you can link courses to specific pathways. Students accessing the system can choose pathways or individual courses to add to their Course Plan.

Add, Edit, or Delete a Course

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Add Courses on the left-hand menu under Maintain Site Data Tables.*
3. *Select a subject from the Select a Subject drop-down menu.*
4. *To Edit or Delete a course, click Edit or Delete in the right-hand columns.*
5. *To Add a course, scroll to the bottom of the screen, fill out the blank fields, and click Add New.*

Remember to select the appropriate subject from the drop-down menu before adding or editing courses.

Add, Edit, or Delete a Pathway

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Add Pathways and Link to Courses on the left-hand menu under Maintain Site Data Tables.*

3. *To Edit or Delete a pathway, select the pathway from the Select a Pathway drop-down menu and click Edit or Delete in the right-hand columns.*
4. *To Add a pathway, click “---New---”, fill out the blank fields, and click Add New.*

Link Courses to a Pathway

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Add Pathways and Link to Courses on the left-hand menu under Maintain Site Data Tables.*
3. *Select the pathway from the Select a Pathway drop-down menu.*
4. *In the left-hand column, click Select for the pathway to which you want to add courses.*
5. *Under the Courses in Pathway section, use the drop-down menus to select the course you want to add to this pathway.*
6. *In the “Seq Nbr.” column, enter a number to determine where the course appears in the order of courses for this pathway.*
7. *Click Add New.*

The course is added to the selected pathway. To add more courses to this pathway, repeat Steps 5 to 7. If you want to add courses to a different pathway, remember to first select that pathway from the Select a Pathway drop-down menu at the top of the screen.

Add a Custom Introduction to the Course Planner

You might want to include a custom introduction to the Course Planner for your school. You can choose whether to include the default introduction before or after your custom one, or exclude the default introduction all together.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Edit Introduction on the left-hand menu under Introduction.*
3. *In the Edit Site Introduction field, enter the custom introduction for your site.*
4. *Choose whether the default introduction appears before or after your custom introduction, or not at all.*
5. *Click Save Introduction.*

Generate Courses Report

Use the Courses Report to see all courses for a particular subject, or for all subjects.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Generate Courses Report on the left-hand menu under Reports.*
3. *Select the subject from the Select a Subject drop-down menu.*

Generate Pathways Report

Use the Pathways Report to see a list of all pathways with a particular name.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*

2. *Click Generate Courses Report on the left-hand menu under Reports.*
3. *Select the pathway from the Select a Pathway drop-down menu.*

Generate Report of Courses per Pathway

Use the Courses in Pathways Report to see a list of all the courses within a pathway.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Create and Edit Course Planner Content.*
2. *Click Generate Courses in Pathways on the left-hand menu under Reports.*
3. *Select the pathway from the Select a Pathway drop-down menu.*

A report appears showing each pathway, what school year it's for, and the courses under it.

Export and Import Courses and Pathways

Use the Export and Import tools to share courses and pathways with other teachers at other schools. When logged in as the Site Administrator, hover over the Customize tab and click Export/Import Course Planner Content. The Site Course Planner – Course Export/Import screen appears.

Upload Multiple Courses Instead of Creating Them One-by-One

To upload many courses or pathways at once instead of creating them one-by-one in the system, first export a blank template at Step 2, below, fill it out, and then import it into the system.

Export Courses

Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click the Export Courses link on the left-hand menu under For Site Courses.*
2. *Choose whether to export a blank template or the existing site courses.*
3. *Click Export Courses. An Excel file automatically downloads. Check the Downloads folder on your computer and open the file.*
4. *Save the Excel file to your computer or network.*

Import Courses

Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click the Import Courses (Excel File) link on the left-hand menu under For Site Courses.*
2. *Choose whether to replace all existing courses with the new import, or to add the new imported courses to the current ones.*
3. *Click Choose File and select the file from your computer or network that you want to use.*
4. *Click Import Courses.*

Export Site Pathways

Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click For Site Pathways on the left-hand menu, then click the Export Pathways link.*
2. *Choose whether to export a blank template or the existing site pathways.*
3. *Click Export Pathways. An Excel file automatically downloads. Check the Downloads folder on your computer and open the file.*
4. *Save the Excel file to your computer or network.*

Import Site Pathways

Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click For Site Pathways on the left-hand menu, then click the Import Pathways (Excel File) link.*
2. *Choose whether to replace all existing pathways with the new import, or to add the new imported pathways to the current ones.*
3. *Click Choose File and select the file from your computer or network that you want to use.*
4. *Click Import Pathways.*

Export Courses in Pathway

You can share courses that are associated with a pathway with another school by exporting them to an Excel file. Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click For Site Courses in Pathways on the left-hand menu, then click the Export Courses in Pathways link.*
2. *Click the Export Courses in Pathways button. An Excel file automatically downloads. Check the Downloads folder on your computer and open the file.*
3. *Save the Excel file to your computer or network.*

Import Courses in Pathways

If you receive an Excel file containing courses associated with a pathway, use these instructions to import them. Follow the instructions above to get to the Site Course Planner – Course Export/Import screen.

1. *Click For Site Courses in Pathways on the left-hand menu, then click the Import Courses in Pathways (Excel File) link.*
2. *Choose whether to replace all existing courses in pathways with the new import, or to add the new imported courses in pathways to the current ones.*
3. *Click Choose File and select the file from your computer or network that you want to use.*
4. *Click Import File.*

Include a Helpful Link in the Course Planner

To give students more information, you can add a link that appears at the top of the Course Planner when students access it. For example, you might send students to your school's curriculum guide on your school's website.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Set Course Planner Custom Link.*
2. *In the Link Text field, enter a title for the link.*
3. *In the Link URL field, enter the web link.*
4. *Click Save Changes.*

PRIVACY

When a user sets up her portfolio, she can choose whether or not administrators and staff can view content in her portfolio. When Portfolio Users hide their portfolios, your site cannot accurately report on Portfolio User progress in the form of checklists, career plans, assessments, and much more.

Middle and high school sites can require students to opt-in to showing portfolio content at their site. However, before that feature can be enabled, MCIS requires that a school submit a form attesting that

they meet the federal laws governing student privacy. Contact MCIS for more information about enabling the privacy opt-in feature to improve school-wide reporting.

Once the feature is enabled, a site can improve the accuracy of their reporting by requiring students to opt-in to showing portfolio content.

1. *When logged in as the Site Administrator, hover over the Customize tab and click Set Portfolio Privacy Options.*
2. *Select “Always opt-in portfolios” and click Save Changes.*

New users now cannot choose to hide their portfolios. Previously hidden portfolios remain hidden.



HELP & LINKS TAB

Look under the Help & Links tab to find tutorials about the administration tools, curriculum resources, and the Contact Us form.

FIND TUTORIALS ABOUT THE ADMINISTRATION TOOLS

When logged in as the Site Administrator, hover over the Help & Links tab and click Administration Tools Tutorials. Select the tutorial that best describes what you're looking for.

FIND CURRICULUM RESOURCES

When logged in as the Site Administrator, hover over the Help & Links tab and click Curriculum. You are taken to a variety of curriculum resources that MCIS provides for designing and planning a curriculum using MCIS.

Note that clicking the Curriculum link takes you to the front-end MCIS website. To return to the Administration Tools, click Show at the top of the screen then click Return to: Site Administration.

CONTACT US

We're always looking for feedback about the system, whether it's suggestions for additional content, a navigability issue, or something else. To send us feedback, hover over the Help & Links tab and click Contact Us. Enter your email address and feedback and click Submit.

