Introduction to Student Portal
Joomla! Administration

Overview

The ClassMate Student Portal was designed for Students to access their own profile information, including Attendance, Grades, Discipline and current Schedule detail. This access allows Students a comprehensive view of their performance at the Career and Technical Center or BOCES. This document will review customization and administrative options for the ClassMate Student Portal.

Accessing the Joomla! Administration Site

The Joomla! Administration site URL is your Student Portal URL followed by /administrator

http://portals.classmate.net/sp/yoursitename/administrator

Administrative accounts must be established in Joomla! prior to login

Creating a Joomla Administrator Account

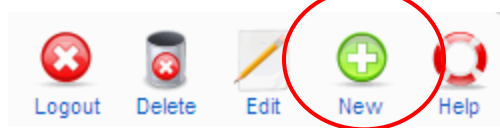To create an administrative user name, Go to the User Manager on the Control Panel Page or got to the Site Menu> User Manager
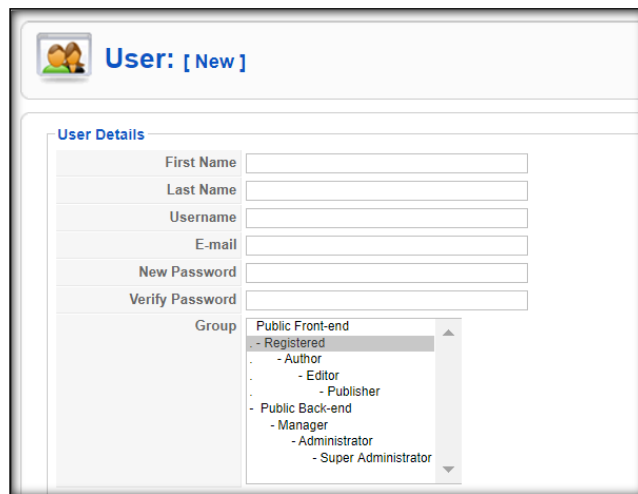
  or
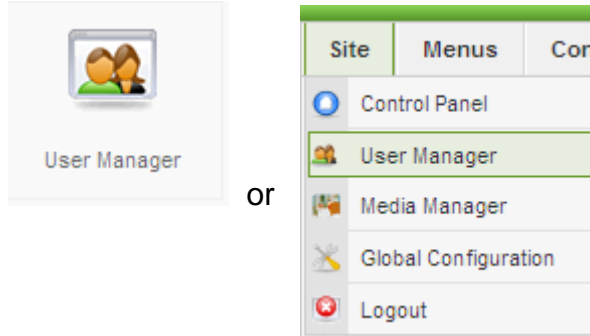
Select **New**

Note: To delete a user account in the User Manager, just click the checkbox to the left of the user account and click the delete icon

Enter the following information:

- **Last Name**
- **First Name**
- **User Name**
- **Email**
- **New Password (Verify Password)**
- **Group (Super Administrator is reserved for Harris users only)**

Active Directory Set Up

ClassMate and the Student Portal are now integrated with Active Directory to make creating Student Accounts much more efficient! Please follow the instructions provided to you to set up your Active Directory in a way that allows it to integrate with ClassMate and the Student Portal. These instructions include how to install the certificate, setting up the port, and testing internally and externally using Softerra. This step must be completed before moving on to creating user accounts in Joomla.

Creating a Registered User Account

Using Active Directory created students accounts and importing them into ClassMate makes creating Student Accounts in the Student Portal a very easy and quick process! **First Time Active Directory Setup step must be completed before you can utilize the import function in ClassMate.

Using the export feature of Active Directory, export out the below fields in this order:

- Student Username – used to reference a valid account in AD
- Student Password – used in reference to account in AD
- First Name
- Last Name
- Student ID (ClassMate ID) – used in ClassMate to locate the proper student for display on the portal (f this is not something Active Directory stores, these can be entered on the template, this is a requirement on the ClassMate side)
- Student Email address – used to validate the student in Joomla (if this is not something Active Directory stores, these can be entered on the template, they CAN BE fictitious, but is a requirement on the ClassMate side for the accounts to link to the appropriate student)

	A	B	C	D	E	F	G	H
1	**Username**	**Password**	**First Name**	**Last Name**	**Student ID**	**Student Email Address**		
2								
3	jsmith	js995	John	Smith	123456789	jsmith@school.org	example record	
4								

Once the template is ready, it can be imported into ClassMate:

- Open Modules > System Administrator > Student Username/PWD Generation
- Click on the Import tab > click the Browse button to find your template file
- Click the blue triangle "Run" button to import
- Note: *You can import as many times as needed*. Anytime a new student is enrolled would be a best practice for you to run this process (or daily at least). The rules are:
 o The import will NOT REMOVE any existing student accounts

- o The import will ADD any student and their account (U/N & P/W) that do not yet exist
- o The import will DO NOTHING if the student account already exists with a U/N & P/W
- o The student accounts will rollover each year that the student is enrolled in ClassMate.

Once imported, you will find the students and their usernames & passwords on the Maintain tab (first tab) in the module. They will also now all be in Joomla and the student can now successfully LOG IN to the Student Portal!

To **create Student accounts manually** (without using Active Directory), follow the steps outlined below.

- In ClassMate:
  - o Requirement #1: Create Student User Accounts:

    Use Modules > System Administrator > Student Username & PWD Generator to generate a username and password for each student.
    - ▪ If you do not currently have U/N's and P/W's established, you can generate these in bulk using the Generate tab; otherwise, use the Maintain tab to update/set U/N's and P/W's manually.
    - ▪ If you do already have U/N's and P/W's established but not yet in ClassMate, you can enter them on the Maintain tab manually. You can export out the U/N's and P/W's using the Export tab if you wish to import these into another system.
  - o Requirement #2: Enter email addresses for each student (these can be fictitious, but must be unique)

    Use Modules > Student Enrollment > Student Master Information to enter an email address in the email field on the first tab.
- In Joomla (these instructions also on last page of this document):
  - o Click Components > Parent Portal > Student User Data tab
  - o Click the Import button (this will import students who have been set up in ClassMate)
    - ▪ Each time there is an update to the students user accounts in ClassMate, or you have added a new student, click the Import button and it will go through and either update or create the new accounts. There is no limit as to how often/many times to push the Import button.
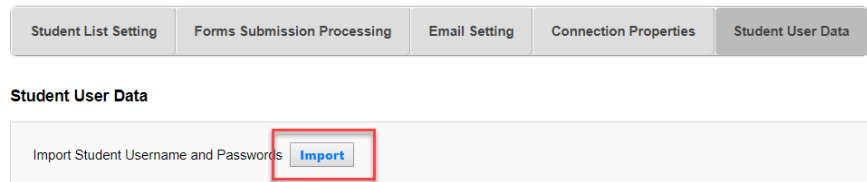
-
  - A message will display next to the user information:
    - Please Enter a Valid Email Address
      - This will display if the email address is either not unique (same as another student, or matches a contact) or is blank (has not been entered). Try again.
    - This Email address is already registered
      - This means this account has already been created, ignore these.
    - This username is already in use
      - This means the username is not unique, Try again.
    - Successfully Imported
      - This is now a valid student account, You are ready to go!

Important Note: If you have created the student as a Contact for themselves, the email address associated to the contact will need to be removed. There can only be ONE reference of an email address per student in the entire system. The email address is found in the Student Master and cannot also exist as a contact email address under Student Contact Information. If you need help removing the email addresses, please contact a member of the Harris Support team.

## Administrator Views

Control Panel View
The Control Panel view is the first page the Joomla! Administrator will view upon login. Users can return to the Control Panel view by accessing the Site Menu and selecting Control Panel.
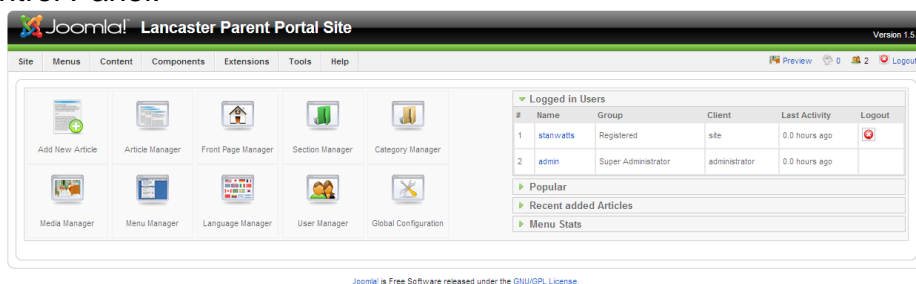
Use the Article Manager to edit your portal **Welcome Message**

Access the **Article Manager** from the **Control Panel** Page or select the **Article Manager** from the **Content** Menu

(**Note**: to edit the Welcome Message using Rich Text Formatting, go the **Site** Menu and select **"Global Configuration"**. Under **Default WYSIWYG Editor,** select "Editor: TinyMCE 2.0) from the drop-down prior to editing the Welcome Message)
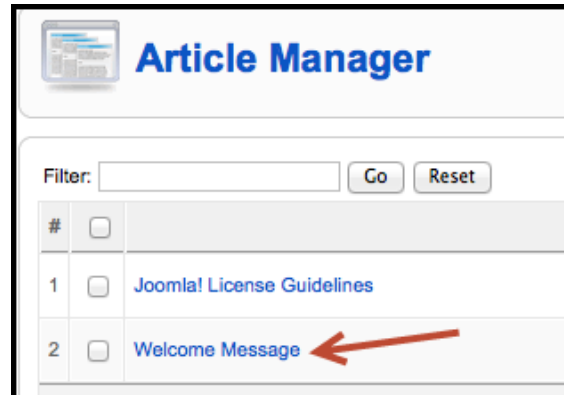
Select **the title under Choice #2** (text may vary, but will most likely be **Welcome Message**

Edit your Welcome Page Title and display text here and save changes.

- **Tip #1:** If you are using white font on a black background (like the default is when you get a portal site), it may look as though the box is *empty*. However if you highlight in the box, you will see that the font is just white. You may want to highlight all and make the font a different readable color until you get the wording that you want. Then switch back to white font.
- **Tip #2:** It is easiest to open 2 tabs on your browser. Tab 1 will be your portal URL and Tab 2 will be your Joomla URL. When you make changes in Joomla, go to the portal URL tab and click the refresh button to see your changes. That way you can make changes and see the results as you go.
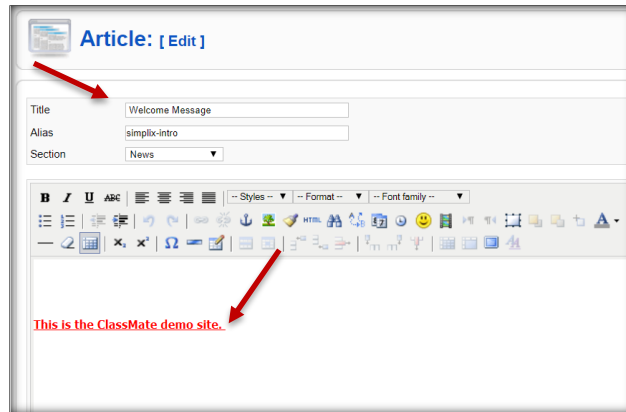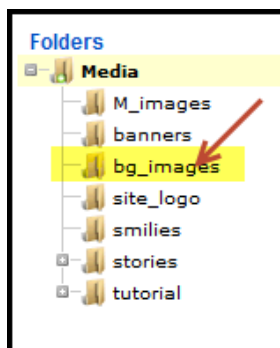
Uploading a Background Image & Logo using the Media Manager

The Media Manager allows the portal administrator to upload a Background image and Logo image to display on the welcome page of the Student Portal

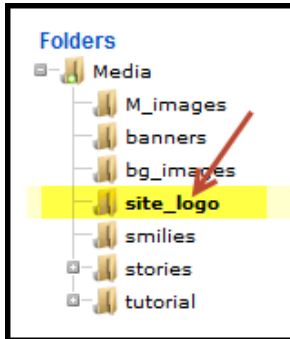**To upload a Background Image:**
- Select the Media Manager from the Control Panel Page, or go to the Site Menu and select Media Manager
- Click bg_images to upload to the background images folder
- Under "Upload File", click Browse to select a file. Then click "Start Upload" to upload
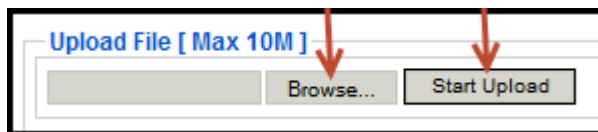
To upload a Logo Image:
- Select the Media Manager from the Control Panel Page, or go to the Site Menu and select Media Manager
- Click site_logo to upload to the logo images folder

- Under "Upload File", click Browse to select a file. Then click "Start Upload" to upload

Selecting a Background Image and Logo for the Welcome Page using Template Manager

The Template Manager allows the portal administrator to select the Background Image and Logo to display on the Front Page of the Student Portal. You must have loaded your bg_images (background image) and site_logo (site logo) in the prior step to complete this step.

To select a background image and logo for the front page:
- Under the **Extensions** Menu, select the **Template Manager**
- Click the ClassMate Parent Portal! Template to upload the image
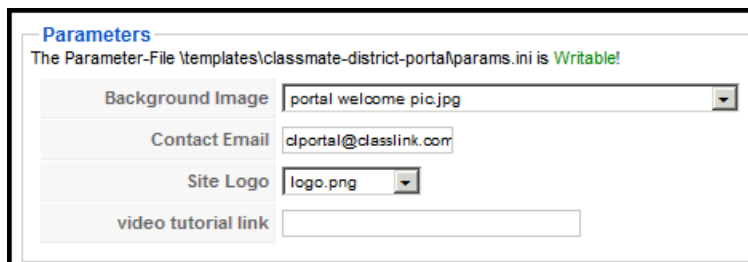
- Under the **Menu Assignment** section, verify the following selections:
  - **Select from List** is selected
  - **Home** is selected
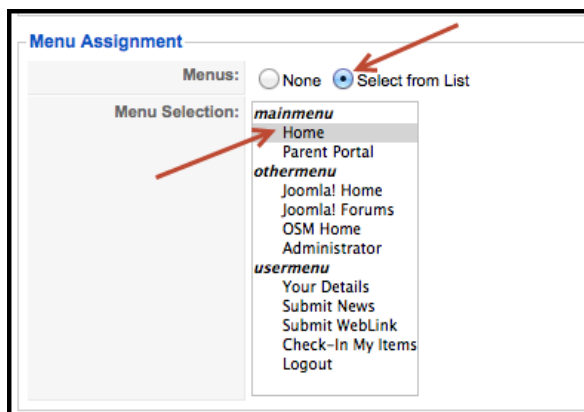
- Under the **Parameters** section, select:
  - o **Background Image**: Select an uploaded background image from the drop-down
  - o **Contact Email**: Enter a contact email for a portal administrator
  - o **Site Logo**: Select an uploaded logo image from the drop-down
  - o **Video Tutorial Link**: Select a link to a video tutorial (when available)

Please Note: Make sure ClassMate Parent Portal! is flagged as "Assigned" in the Template Manager or you will receive an error message when accessing the home page of the portal

The Student Portal Manager
Use the Student Manager found under the **Components Menu> Student Portal** to:

- Determine what Student Views will be available on the portal
- Determine if Email Alerts will be available on the portal
- [Optional] Set up Forms to be:
  - a. Viewed
  - b. Indicate that the form has been "Read"
  - c. Indicate that the form has been "Accepted" or "Denied"
  - d. Electronically sign/receive authorization on a form

Student List Setting

The Student List Setting allows the administrator to configure the View Settings and Detail Settings for the Student Portal
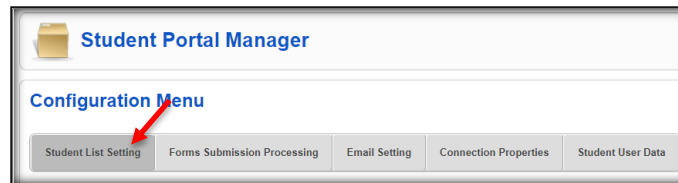
View Settings
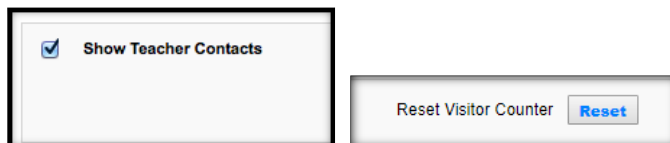
View Settings include:

- **Show Teacher Contacts:** Displays hyperlink to teacher email addresses to authorized Student users
- **Reset Visitor Counter:** Resets the counter for the number of visitors

Detail Settings

Detail Settings determine what views are available and what text will display for each view

Detail Setting Student Views include**:**

- **Attendance**: Displays enrolled student attendance, current and previous marking periods
- **Grades**: Displays enrolled student grades; only includes components in MP grade formula
- **Discipline**: Displays the Discipline Infraction Code & Discipline Action Codes only (no details)
- **Schedule**: Displays the student's current schedule

- ***Email Alerts**: Allows the authorized portal user to configure email alerts for attendance, grades, discipline & assignments
- **Reporting**: Displays Report Card and Progress Report Data

Forms Submission Processing Setting [Optional]

The Forms Submission Processing Setting allows the Joomla! administrator to set up and manage what Forms can be viewed by the Student users.
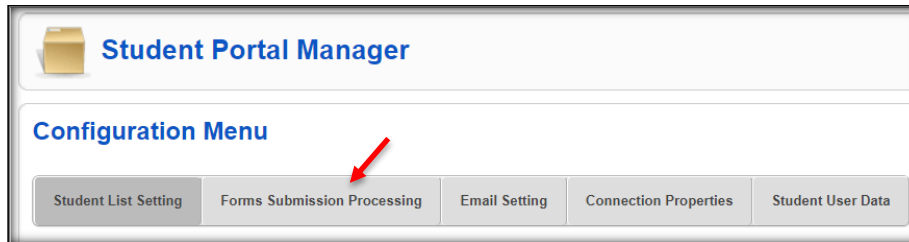
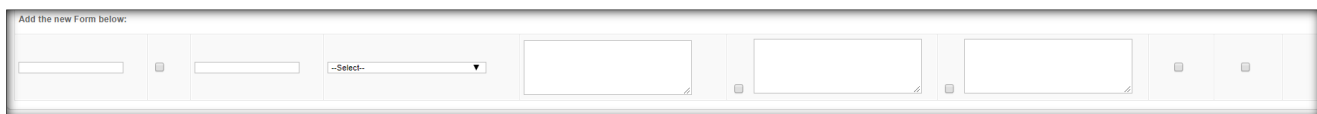Forms Submission Settings include:

Detail Settings:

- Ref ID: 4 character code found on Codes in Master Codes Maintenance "Student Forms Checklist 1700-99". This ref ID indicates what should occur in Student Forms checklist in Student Master Information. When the Form/Code has a Ref ID, which is also entered in Joomla, this ties this form to the Student Portal forms. When this form is indicated as being "Read" and/or "Accepted"/"Denied", the appropriate form will be checked in Student Forms checklist in Student Master Information.
    - o Example Form: Student Handbook, found in Master Codes Maintenance as Student Handbook.
    - o To tie it to Student Portal:
        - § Standard "Read" Indication: The Ref ID should start with SP, followed by 2 digits that indicate the form name. This must always exist. Example: SPSH would be the code for Student Handbook.
        - § Optional "Accepted" Indication: The Ref ID should match the Standard "Read" Indication, with an additional code -Y to indicate acceptance. Example: SPSH-Y
        - § Optional "Declined" or "Denied" Indication: The Ref ID should match the Standard "Read" Indication, with an additional code -N to indicate Non-acceptance. Example: SPSH-N

- Enable: If you want this form to be viewable on the Portal, this should be checked.
- View Name: The name that the form will be have on the Portal.
- File: This is the .pdf that will be viewable in the "view pane" for the Students to view.
    - The file can be uploaded under: Site > Media Manager > Media Folder > Forms
- Custom Message: This is the message that can be customized by the individual site, for the Students to read. This can include instructions, or the purpose of the form as examples.
- Include Permission Indicator: This is a check box, if checked, this adds a "Yes/No" toggle on the Portal. This is used as "Acceptance/Declined" option. There is also a custom message to be included, which the Student user will see. Example message: "Please indicate your acceptance of our Insurance Policy". A Yes/No is necessary in this example.
- Include Digital Signature: This is a check box, if checked, this adds a signature box on the Portal. This is used for electronic signatures. You simply instruct to type in the box their name. Example message: By typing your name and selecting "I Agree", you are applying your electronic signature to this form.
- Disable Editing Permission Indicator once Selected: This is a security setting where if this is checked, once the Permission Indicator is selected on the portal by a Student User, it cannot be unchecked.
- Disable Editing Acceptance Indicator once Selected: This is a security setting where if this is checked, once the Acceptance Indicator is selected on the portal by a Student User, it cannot be unchecked.
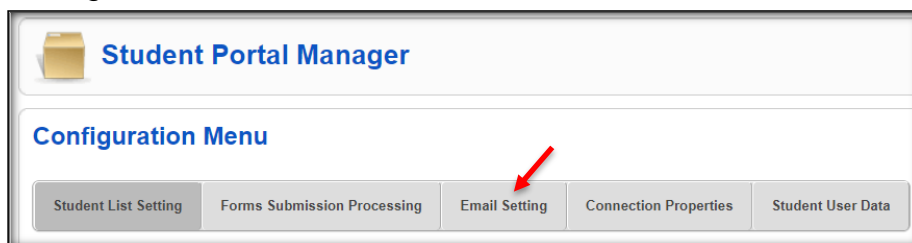- Delete: If you want to remove a form, select this box and save.

To Add a Form:
- Fill in the fields under "Add the New Form" appropriately.

Email Setting

The Email Setting allows the Joomla! administrator to determine what email Alerts will be available to registered Student users

Email Setting options include**:**

- **Email Alert Setup**: Determine if email alerts will go out Once a Day, Twice a Day, and select times email(s) will be sent

- **Alert Message Customization:** Determine which alerts will be available to Student users, and customize email Subject Lines and Email Body Text

Student User Data Setting

The Student User Data setting allows the Joomla! administrator to import a list of students that comes from the ClassMate system (see above to Register Student Users).
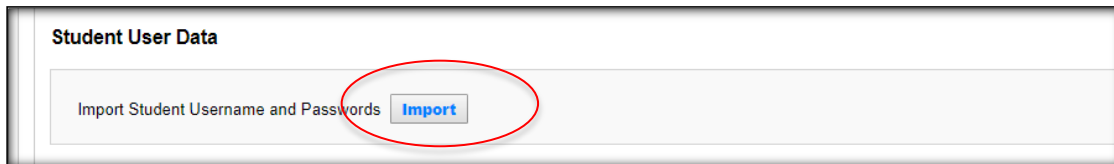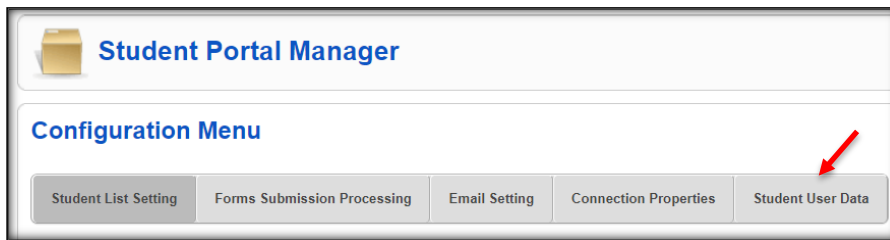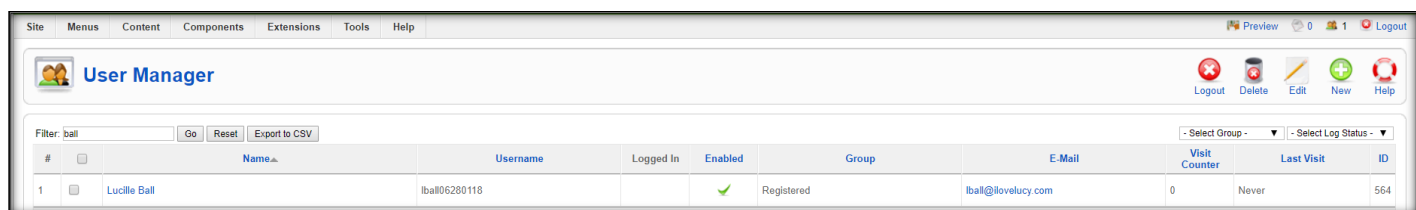
There is no limit to the number of times you can click the **Import** button. Each time you click **Import**, all student users accounts will be brought to the page, and you can see the status of each user.

- This email address is already registered – this will display if the student already has an account. You can ignore these ones, they will always appear on the list.
- Successfully Imported – this will display the first time Import is clicked after a user has been set up. The next time Import is clicked, they will be red "this email is already registered".
- Please enter a valid e-mail address – this will display if the email address is either not unique (same as another student, matches a contact) or is blank (has not been entered).
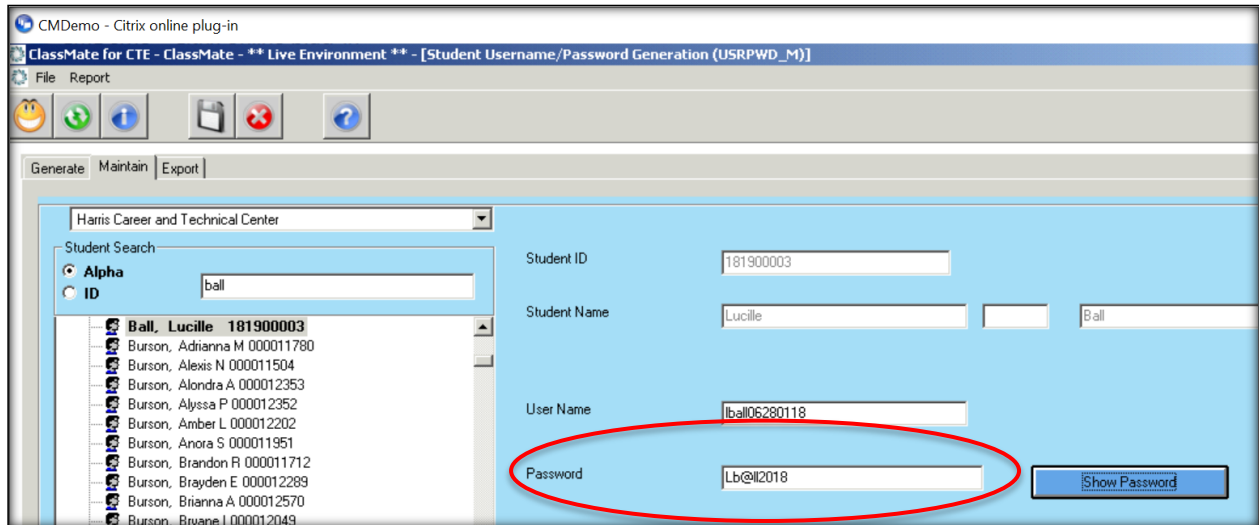
Once your students have been imported, you can find their account details under the "User Manager" setting.

Note: If you want to change a students password, the best practice is to make the change in ClassMate under the Student Username/PWD Generator module, **NOT IN JOOMLA.** The reason is because ClassMate stores the password which can be looked

up later, and once the Import button is clicked, it will pull in the password automatically into Joomla.