

PORTFOLIO ADMINISTRATION

Administration Tools help you organize and manage portfolios and view aggregate data on program usage at your site. Use these tools to create portfolios and provide users with unique usernames and passwords, look up usernames (if the student/client opted in), assign portfolios to one or more groups, send messages, set up custom features, and view reports using various criteria. You can also upload a list of courses available at your school for use in the Course Planner, develop checklists, and create/send messages to users. See the tutorials to learn editing, reporting, customization and navigation options.

Logins

Account Type	Number of Logins since 8/1/2014
Portfolio	3
Site username or IP	5
Staff	0

[Go to full report](#)

Portfolio Accounts

Account Type	Number of portfolios at site
Active Portfolio	109
Portfolios created since 8/1/2014	8,466

[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	13	0
IDEAS	12	0
Interest Profiler	14	0
SKILLS	12	0
FAVORITES		

Quick Links

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

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Home Reports Portfolios & Groups Other Accounts Customize **2** Links

Site 0 Messages Log Out **3**

Portfolio Administration Tools

Log in using your Site Administrator or Staff username and password. Once logged in you can:

1. Get Instant Information on the Dashboard
 - View logins, portfolio counts, and modules with saved records
 - Link directly to password reset, finding a portfolio, or counselor resources

2. Use the top menu bar to:
Run Reports

- Get information about site usage, what users are saving to their portfolio, and more

Maintain Portfolios & Groups

- Reset passwords
- Find, manage, and add portfolios
- Create and maintain groups

Maintain Staff and Other Accounts

- Reset passwords for staff and parent accounts
- Add new staff and parent accounts
- Manage advisor accounts

Customize Your Programs

- Create, edit, and activate checklists
- Create and edit course planner content
- Set portfolio privacy options

Get Help and Links

- Tutorials
- Curriculum link
- Connect to help in your state

3. Use the Site Administration bar to:
 - Send messages to staff and users
 - Change settings
 - Log out