



# Managing portal users

## Dash portal

### Creating users

The **Dash portal** “web application” is fed by the **Dash software**’s database “desktop application”

Adding new users to the Portal is done in two steps:

1. In the **Dash software**, add the new user to the database and assign them a username and password.
2. In the **Dash portal**, within the admin dashboard, click “Import users from Dash”.

See these two steps in more detail on the following pages.

### 1. Adding a New User to Dash

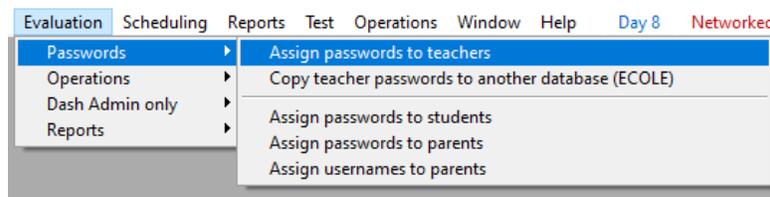


- Open Dash “desktop application” by double clicking the shortcut
- Double-click the current year’s database (ECOLE).
- Follow the instructions below according to the type of user to be added.

***N.B.:** The types of users vary depending on your Dash package.*

#### Adding a Teacher

- Go to **Data > Teachers (Alt+P)**.
- Click **Add (F7)**.
- Assign them a unique **### code** and enter the teacher’s information, primarily their first and last name as it becomes their username.
- Click **Save (F10)**.
- After adding all new users, use **Evaluation > Passwords > Assign passwords to teachers**



- Do not forget to [import these new users to the portal](#).

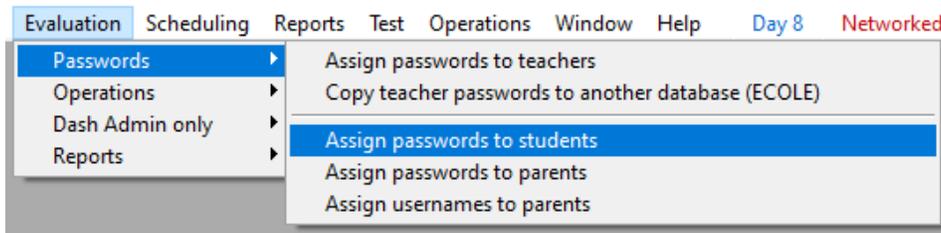
### Enable online marking by assigning course-groups:

- Go to **Data > Course-Groups (Alt+G)**.
- Use **space** to select the course-group(s) that the teacher will instruct
- Click **Mod+**.
- Double-click **Teacher**.
- Enter the teacher's code next to the first course-group, then click **Copy to All (Ctrl+G)**.
- Click **Save (F10)**.

*This step can be done before or after having imported teachers to the portal*

### Adding a Student

- Go to **Data > Students (Alt+E)**.
- Click **Add (F7)**.
- Enter the student's name, surname, and permanent code (if incomplete, enter the 10 first digits). This will help creating his username
- Click **Save (F10)**.
- After adding all new users, use **Evaluation > Passwords > Assign passwords to students**

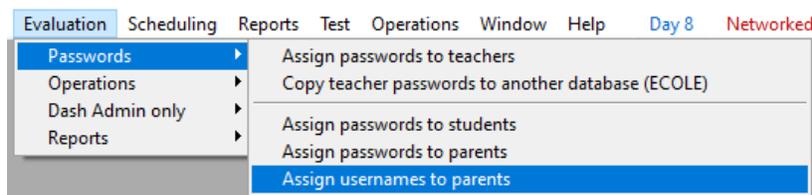


- Do not forget to [import these new users to the portal](#).

**N.B.:** *If a student's **permanent code is incomplete**, import that user again once the complete permanent code is entered in order to update it.*

### Adding a Parent

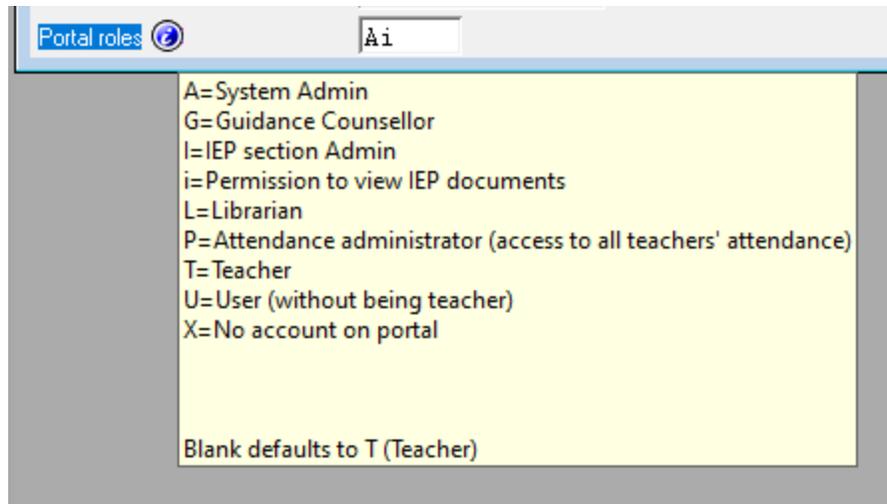
- Go to **Data > Students (Alt+E)**.
- Double-click the student for whom to add a parent, then on **Parental Units**.
- Click **Add (F7)**.
- Enter the parent's information, primarily their email address as it is used for their username.
- Click **Save (F10)**.
- After adding all new users, use **Evaluation > Passwords > Assign passwords to parents**.



- Do not forget to [import these new users to the portal](#).

## Adding an Administrator

- Go to **Data > Teachers**
- If the person does not already appear on this list, click **Add** to create the new administrator. Otherwise, click on the person, then on **Modify**.
- Under **Portal roles**, enter A. This way, the new teacher becomes a portal administrator. Also add any letter from this legend to give other specific access to your administrator.



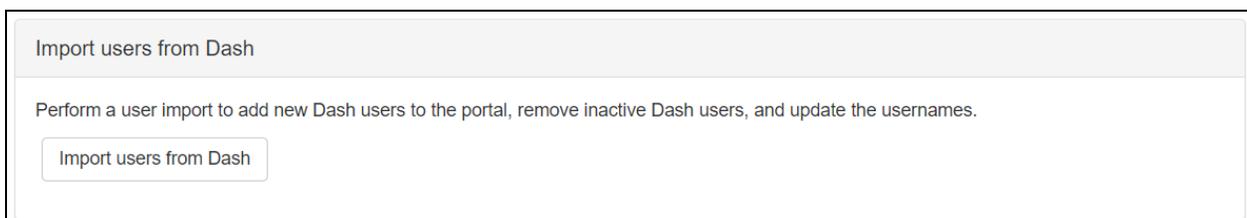
**N.B.:** blank portal status is defaulted to D portal status, which enables basic user access. Therefore, there is no need to update all teacher Portal status.

- Click **Save (F10)**
- If you have already added new users, use **Evaluation > Passwords > Assign passwords to teachers**
- Do not forget to [import these new users to the portal](#).

## 2. Importing Users Into the Portal

1. Login to the Portal as an administrator.
2. Open the **Dashboard**.
3. Click **Import users from Dash**.

Following this operation, all new users will have access to the portal. Do not forget to open the portal and to relay the user's credentials to use the Portal.



## Deleting Users

Deleting a portal user is done in two steps:

1. Deactivating users in the **Dash software**
2. Importing users in the **Dash portal** again to synchronize changes

### 1. Deactivating A User in Dash

#### For a teacher

- Go to **Data > Teachers** (**Alt+P**)
- Click on the teacher then **Modify**
- Change the field **Portal roles** to an **X**
- Click **Save** (**F10**)

#### If needed, transfer the course-groups to another teacher:

- Go to **Data > Course-Groups** (**Alt+G**)
- Sort the groups by clicking the column header **Teacher**
- Select all of the teacher's groups using the **spacebar**
- Click **Mod+** then double-click on **Teacher**
- Enter the new teacher's code
- Click **Save** (**F10**).

#### For a student

- Go to **Data > Students** (**Alt+E**)
- Click the student, then **Modify**
- In the **End date** field, enter the current (or past) date
- Click **Save** (**F10**)

#### For a parent

- Go to **Data > Students** (**Alt+E**)
- Double-click the student then **Parental units of (student)**
- Click the affected parent
- Either click **Delete** (**F9**) or **Modify** (**F8**) and remove the parent's email address

### 2. Importing users from Dash to the portal

1. Connect to Dash portal with as an administrator
2. Click on **Dashboard**
3. Click **Import users from Dash**

