Managing portal users
Dash portal

Creating users

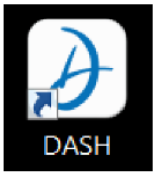
The **Dash portal** “web application” is fed
by the **Dash software**’s database “desktop application”

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

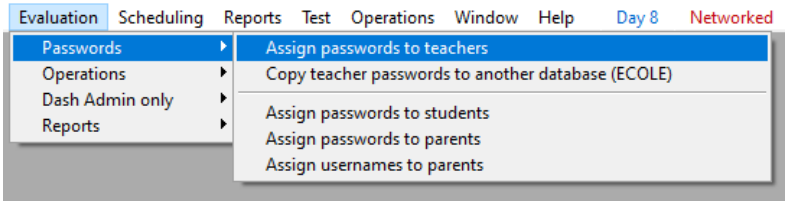


- Open Dash “desktop application” by double clicking the shortcut
- Double-click the current year's database (ECOLE).
- Follow the instructions below according to the type of user to be added.

> ***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.

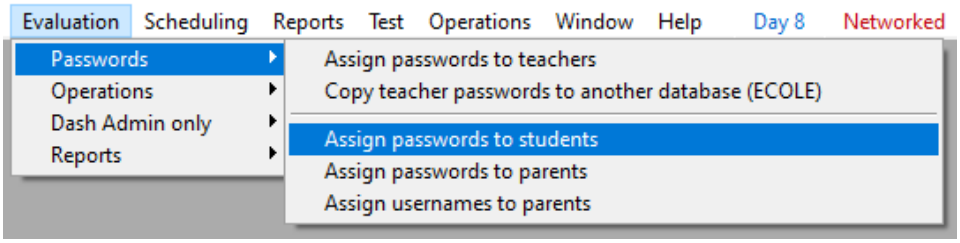
Enable online marking by assigning course-groups:

- 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

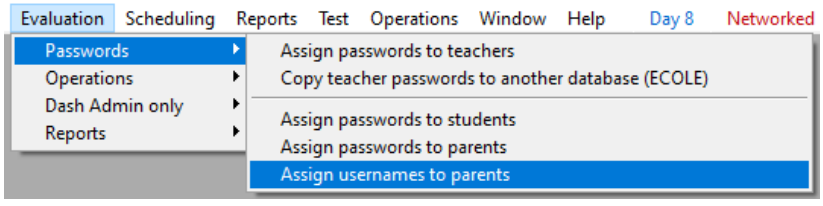


- Do not forget to import these new users to the portal.

> ***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

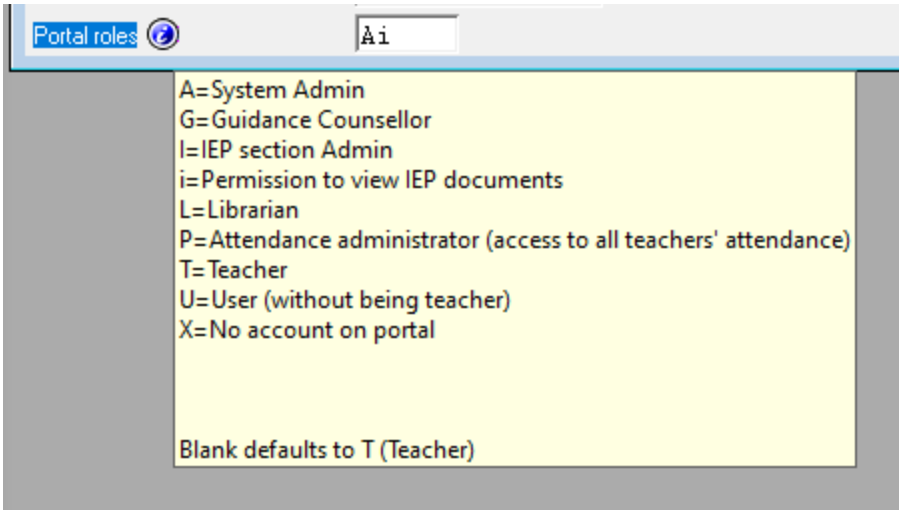
- Go to Data > Students (**Alt+E**).
- Double-click the student for whom to add a parent, then on **Parental Units**.
- Click **Add** (**F7**).
- Enter the parent's information, primarily their email address as it is used for their username.
- Click **Save** (**F10**).
- After adding all new users, use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

