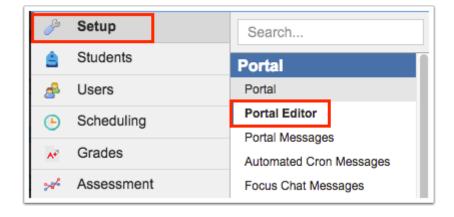
Portal Editor

The Portal Editor screen is used to customize the Portal page display, or dashboard, for different profiles. The dashboard is built using blocks that can contain programs (such as Alerts, Find a Student, Upcoming Events), graphs, and custom HTML. Additional dashboards can also be set up for profiles. Additional dashboards display as tabs on the Portal screen that the user can click to view.

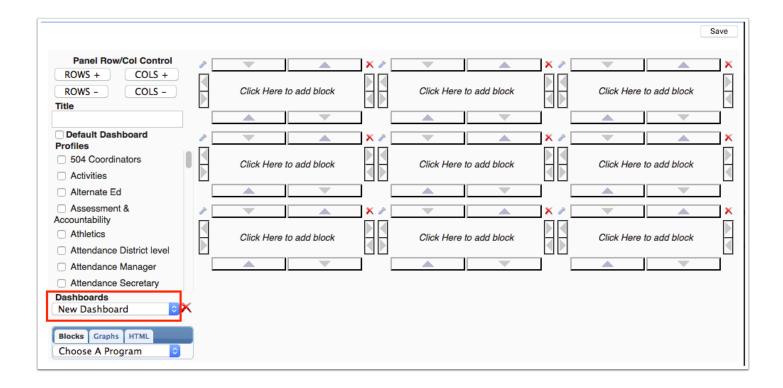
If a profile does not have a dashboard assigned, a default, hard-coded admin, teacher, parent, or student dashboard is displayed.

Adding a New Dashboard

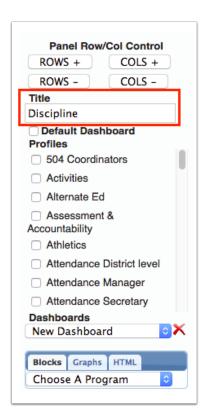
1. In the **Setup** menu, click **Portal Editor**.



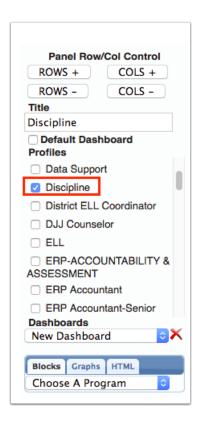
In the Dashboards pull-down, New Dashboard is selected by default.



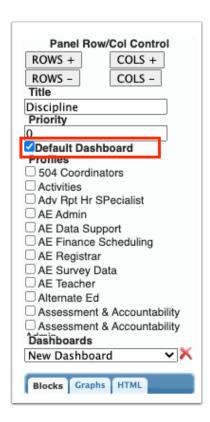
2. Enter a **Title** for the dashboard.



3. Select one or multiple **Profiles** that will be assigned this dashboard.

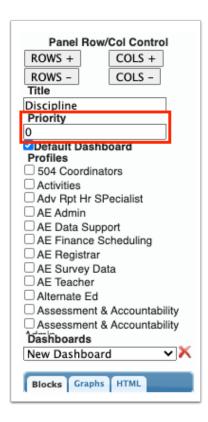


4. To make this dashboard the default for the selected profile(s) (the dashboard will display first when the user logs in, if the user's profile has multiple dashboards assigned), select **Default Dashboard**.

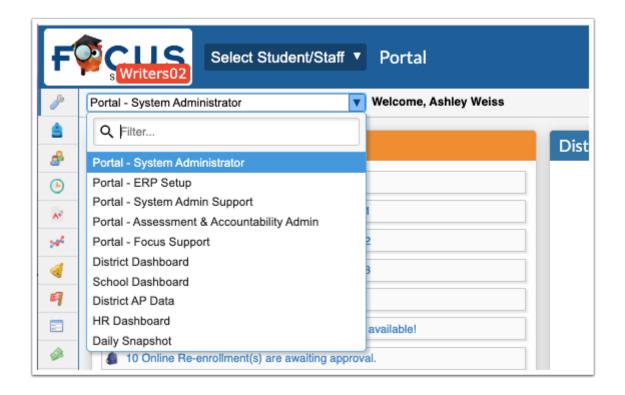


5. The **Priority** field is displayed when the Default Dashboard check box is selected. Enter a priority. 0 is entered by default.

For users with multiple profiles, the dashboard marked with the highest priority will be the dashboard that displays by default when the user first logs in.



When a user has multiple dashboards assigned to their profile, the dashboard set as the default will display first when logged in. If a user has multiple profiles, the priority set on the dashboards will determine which is displayed by default. The additional dashboards are available in a pull-down for selection.

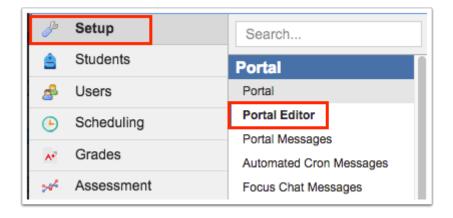


A profile can only have one default dashboard assigned. An error message will display if more than one default dashboard is assigned to a profile.

- 6. Customize the dashboard by adding/removing rows and columns to the layout and adding programs, graphs, and HTML to the blocks. See the procedures below for more information.
- 7. Click Save.

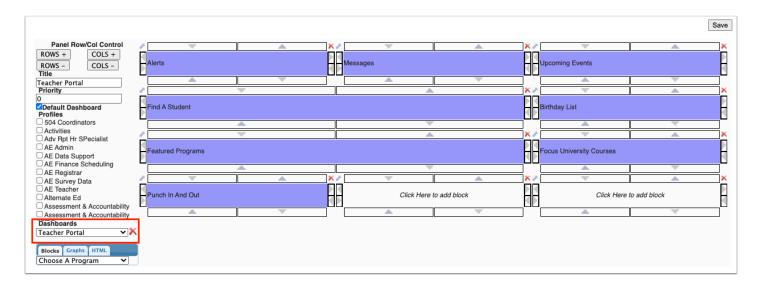
Editing an Existing Dashboard

1. In the **Setup** menu, click **Portal Editor**.



2. In the **Dashboards** pull-down, select the dashboard to edit.

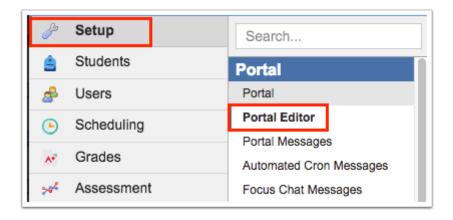
The dashboard layout is displayed on the screen.



- **3.** Edit the dashboard by by adding/removing rows and columns to the layout and adding/removing programs, graphs, and HTML to the blocks. See the procedures below for more information.
- 4. Click Save when finished.

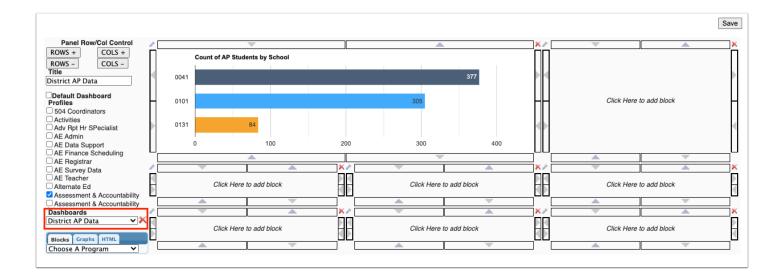
Deleting a Dashboard

1. In the **Setup** menu, click **Portal Editor**.

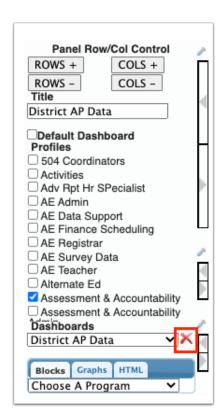


2. In the **Dashboards** pull-down, select the dashboard to delete.

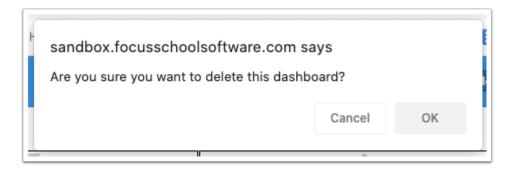
The dashboard layout is displayed on the screen.



3. Click the red **X** next to the Dashboards pull-down.

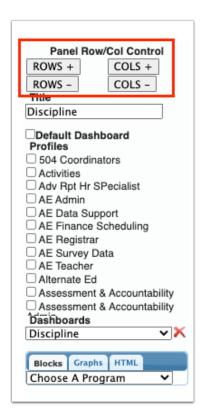


4. In the confirmation message, click **OK**.



Adding and Removing Rows and Columns in the Dashboard Layout

Click the **ROWS** +, **ROWS** -, **COLS** +, and **COLS** - buttons to add or remove rows and columns to the dashboard layout.



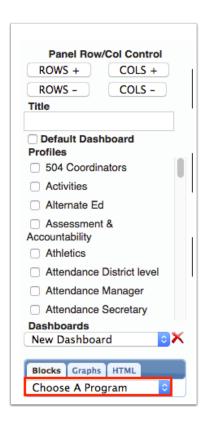


1 A dashboard can have no more than 6 rows and 6 columns.

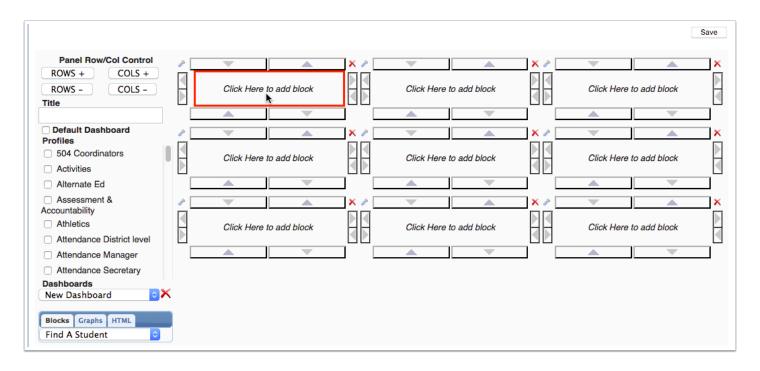
Adding a Program to a Block

Focus provides several hard-coded programs that can be added to dashboards.

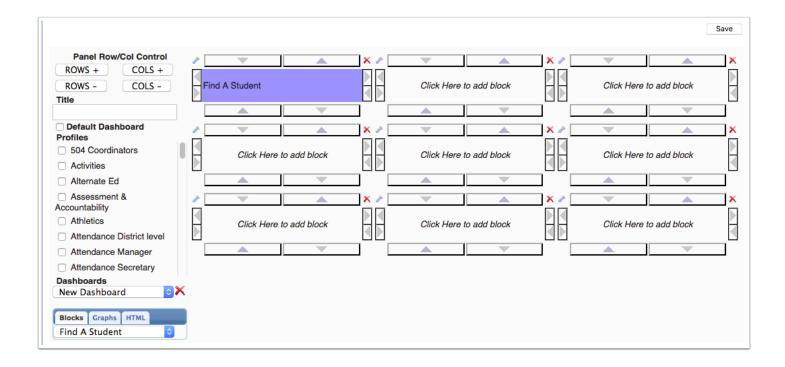
1. In the **Choose a Program** pull-down, select the program to add to the dashboard.



2. Click the block in the layout where the program will be placed.



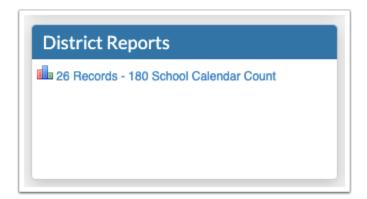
The block turns blue and displays the name of the program that was added.



Program Descriptions

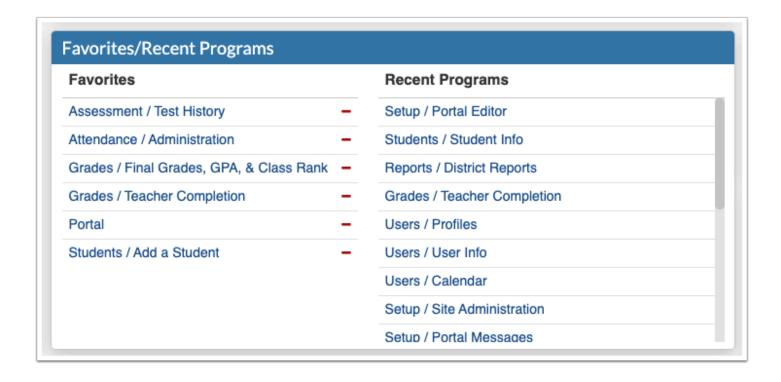
District Reports

The District Reports program displays links to district reports that were set up to be Portal alerts and are available to the user's profile.



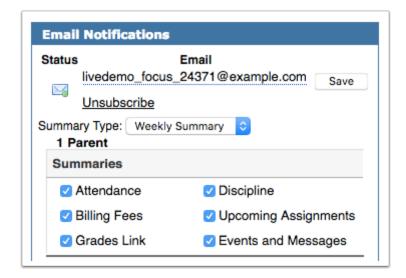
Featured Programs

Featured Programs displays the Favorites/Recent Programs block on the Portal. Under the Favorites heading are links to screens that the user has marked as a favorite. Under the Recent Programs heading are links to recently visited screens.



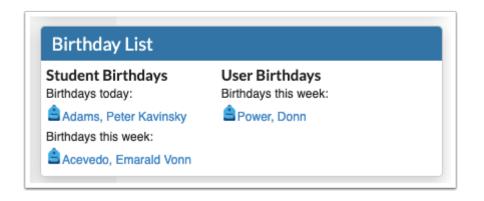
Email Notifications

The Email Notifications program allows parents to set up email notifications for summaries for attendance, discipline, billing fees, upcoming assignments, grades, and events and messages.



Birthday List

The Birthday List program displays students and users who have birthdays during the current week.



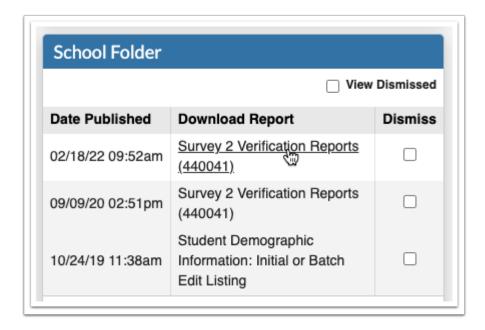
Warehouse Alerts

The Warehouse Alerts program displays alerts related to the Warehouse module in ERP, including items with zero inventory and items with negative price.



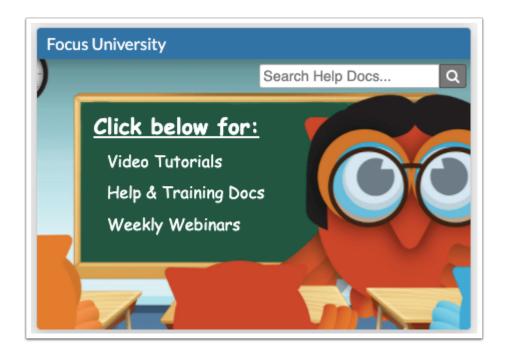
School Folder (Florida)

The School Folder program displays reports made available to the school by the district, such as FTE Summary Reports and validation/exception reports.



Focus University Courses

The Focus University Courses program displays a search bar to search for help documents, as well as links to video tutorials, help and training documents, and weekly webinars.



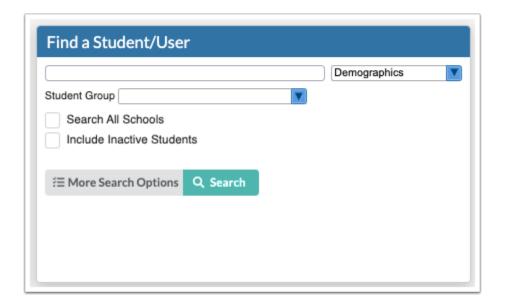
Teacher Web Pages

The Teacher Web Pages program provides links to teacher public web pages created in LMS.



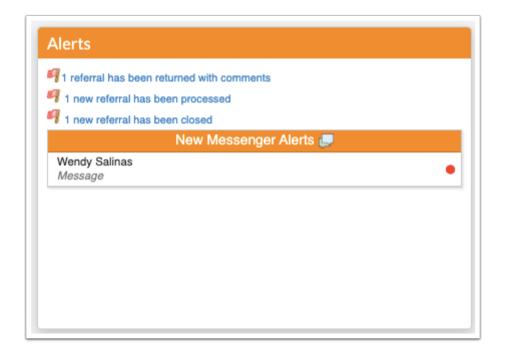
Find a Student

The Find a Student/User program allows users to search for students or users directly from the Portal.



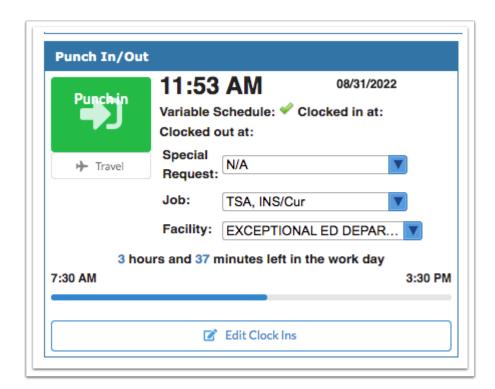
Alerts

The Alerts program displays automated notifications that are profile-specific, such as the number of teachers who have not taken attendance, pending change requests, or discipline referrals that have not been processed. Clicking the alert hyperlink will open the relevant screen in Focus.



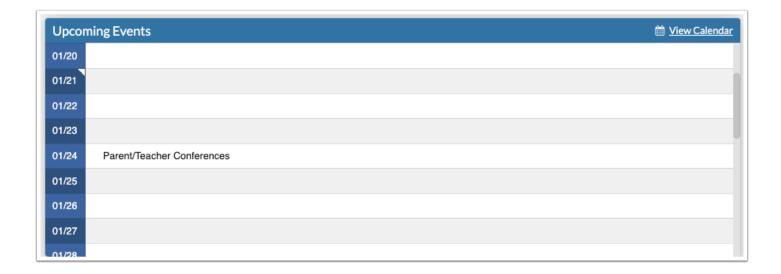
Punch In and Out

For districts utilizing the Time & Attendance screens via ERP, employees have the ability to clock in and out.



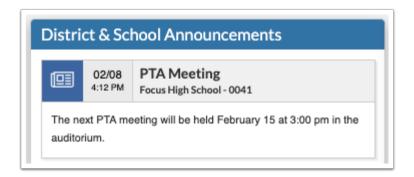
Upcoming Events

The Upcoming Events program displays the next 7 events on the calendar. The event displays until it has passed. Click the **View Calendar** link to open the calendar.



Messages

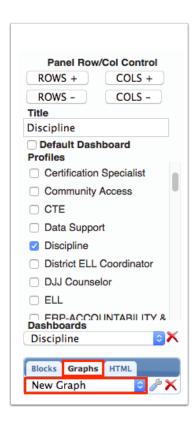
The Messages program displays Portal messages sent by the district or school for the user's profile.



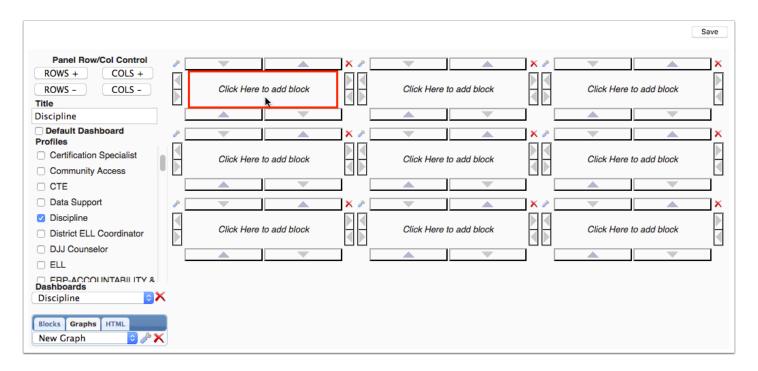
Adding a New Graph to a Block

A graph can be added to a dashboard using a select query with an aggregate function. The graph types include bar, horizontal bar, line, area, and pie.

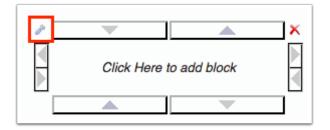
- **1.** Click the **Graphs** tab.
- **2.** Select **New Graph** in the pull-down.



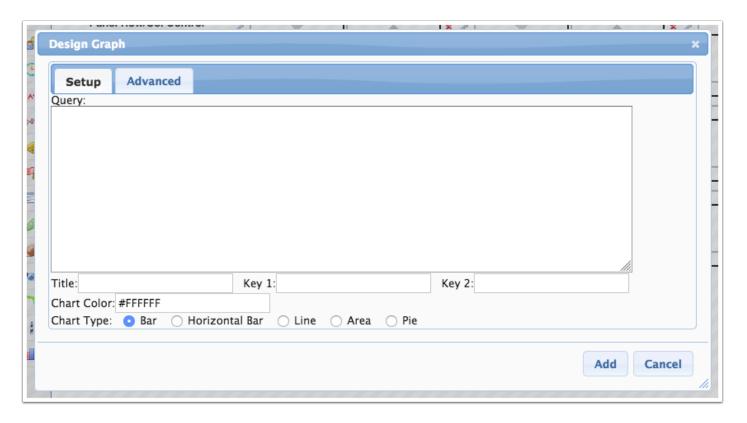
3. Click the block in the layout where the graph will be placed.



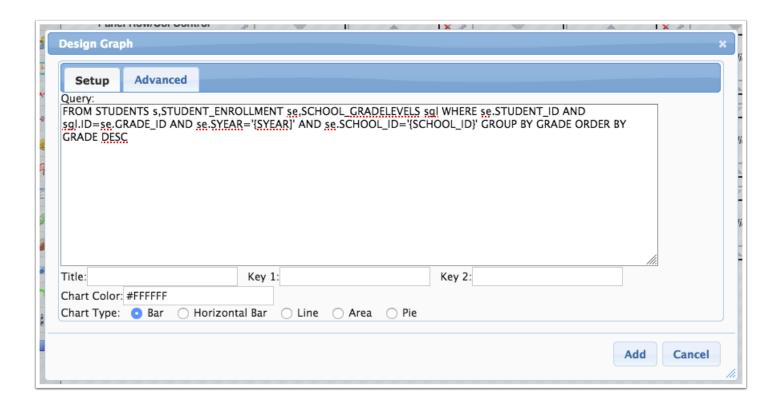
1 Alternatively, a new graph can be added to a block by clicking the wrench icon at the top-left corner of the block.



The Design Graph pop-up window is displayed.



4. In the Query text box, enter the select query with an aggregate function.

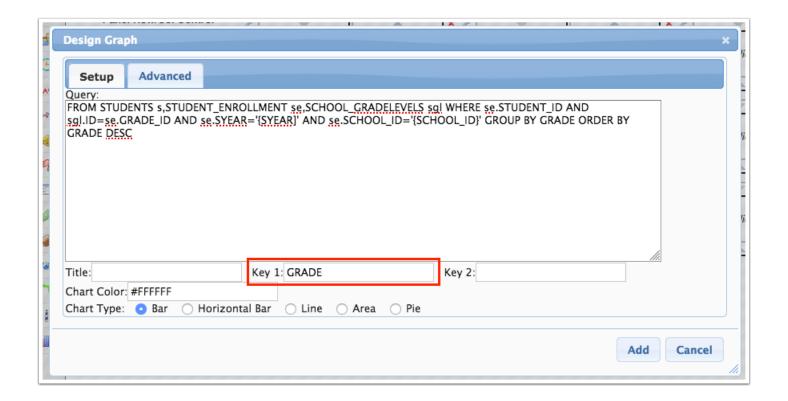


A column alias must be provided for the field that should be displayed in the graph. The aggregate function used to provide the count needs to be denoted as the VALUE.



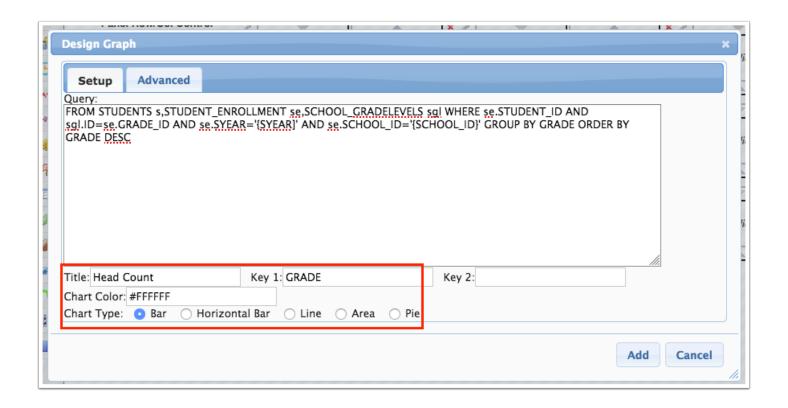
The use of column alias (including VALUE) is case-sensitive for Portal graphs. Be sure any column aliases are in all uppercase letters.

5. Define **Key 1** for the graph. If there are multiple keys (the system allows two), define **Key 2**.



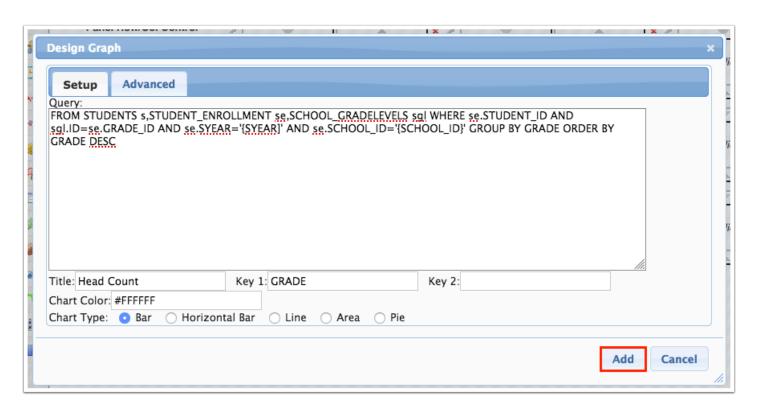
A When defined, the key for the graph should exactly match the column alias for the data to be viewed.

- **6.** Enter a **Title** for the graph.
- **7.** Enter a **Chart Color** using a hex color code.
- **8.** Select the **Chart Type**.

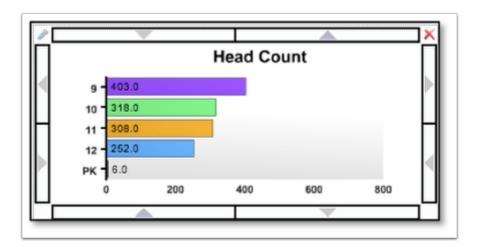


Click the Advanced tab to define more specific size, color, and other options for the graph.

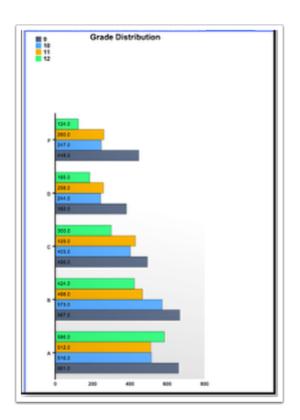
9. Click Add.



The graph is displayed within the selected block.

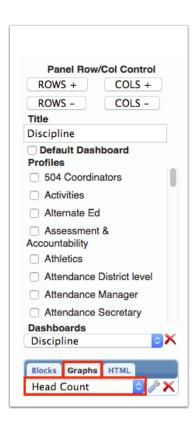


1 If a graph has two keys, the Y-axis will display related to the primary key first, and then sort by the secondary key.

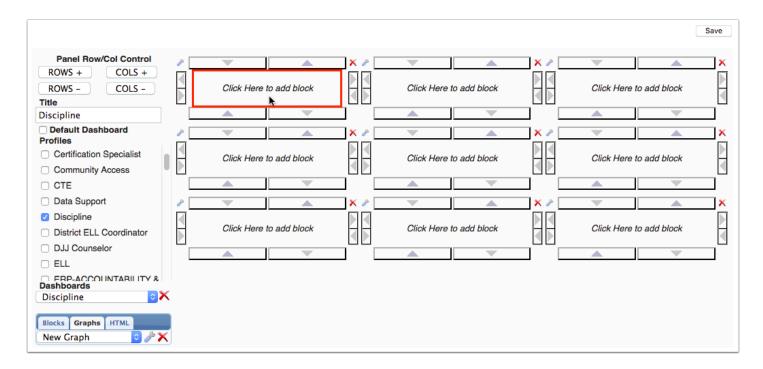


Adding an Existing Graph to a Block

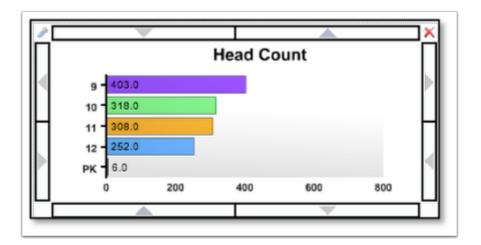
- **1.** Click the **Graphs** tab.
- **2.** Select the desired graph from the pull-down.



3. Click the block in the layout where the graph will be placed.

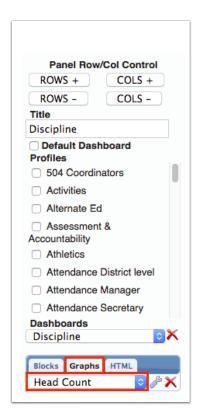


The graph is displayed within the selected block.

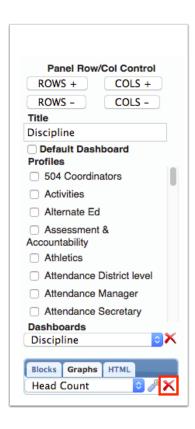


Deleting a Graph from the Graphs List

- 1. Click the **Graphs** tab.
- **2.** Select the desired graph from the pull-down.

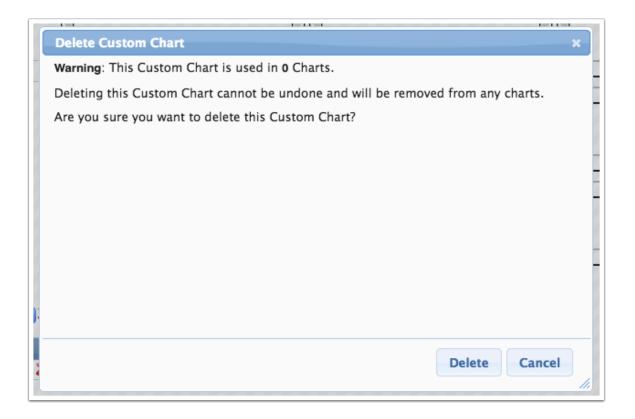


3. Click the **X** next to the pull-down.



A confirmation window is displayed, indicating how many times the graph is being used and warning that deleting the graph cannot be undone.

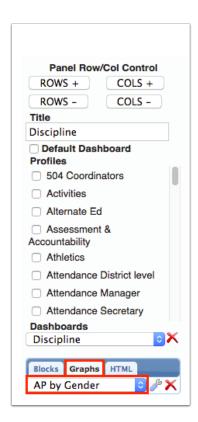
4. Click Delete.



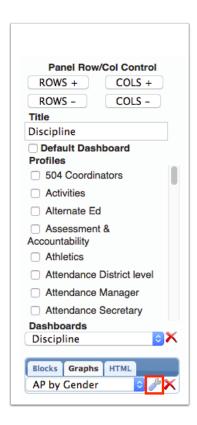
The graph is removed from any dashboards where it is used and is also removed from the graphs pull-down.

Editing a Graph

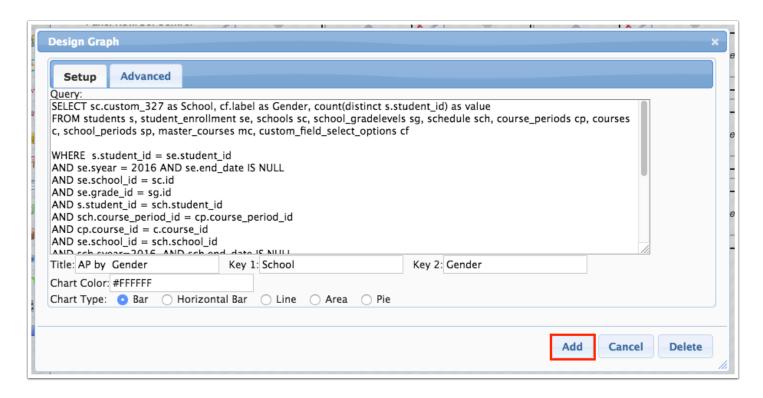
- 1. Click the **Graphs** tab.
- **2.** Select the desired graph from the pull-down.



3. Click the wrench icon next to the pull-down.

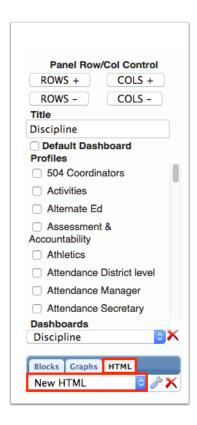


4. In the Design Graph pop-up window, make the necessary changes and click Add.

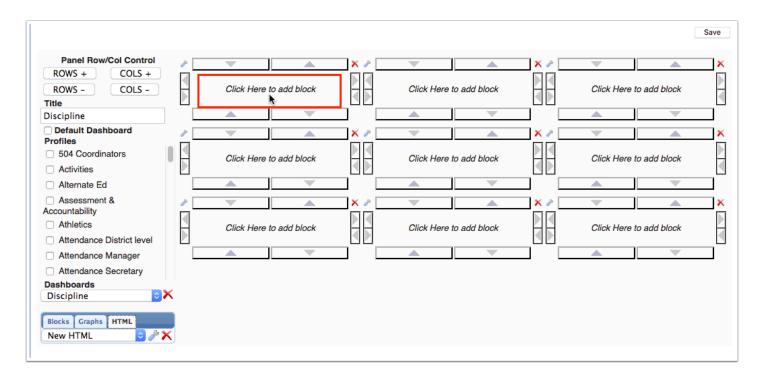


Adding New HTML to a Block

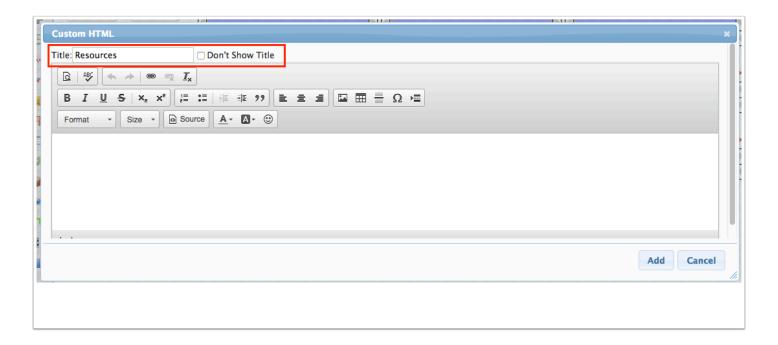
- 1. Click the **HTML** tab.
- 2. Select **New HTML** from the pull-down.



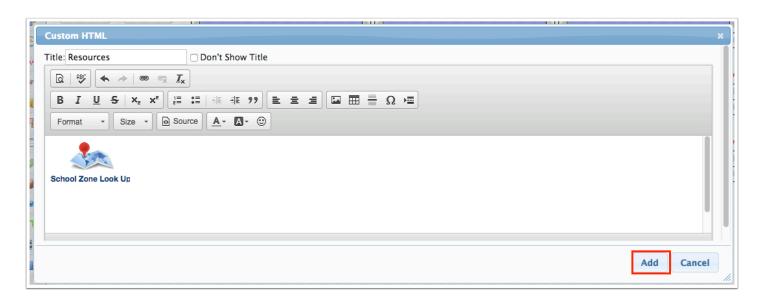
3. Click the block in the layout where the HTML will be placed.



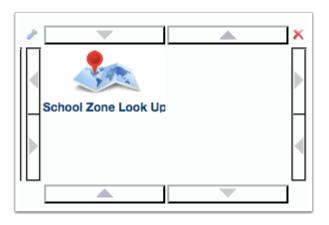
- **4.** In the Custom HTML pop-up window, enter a **Title**.
- **5.** Select **Don't Show Title** if you do not want the title to display on the block on the dashboard.



- **6.** Use the editor to add formatted text, images, tables, etc.
- 7. When finished, click Add.

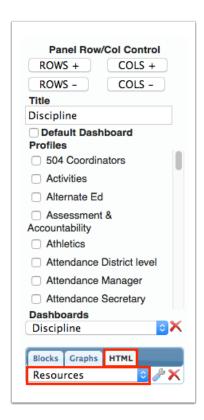


The HTML is displayed within the selected block.

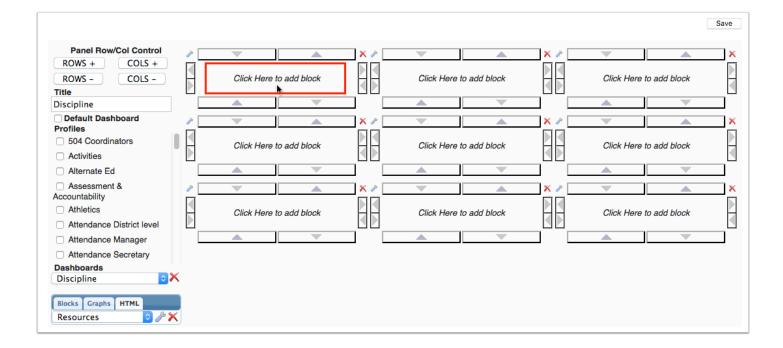


Adding Existing HTML to a Block

- 1. Click the **HTML** tab.
- 2. Select the HTML from the pull-down.



3. Click the block in the layout where the HTML will be placed.

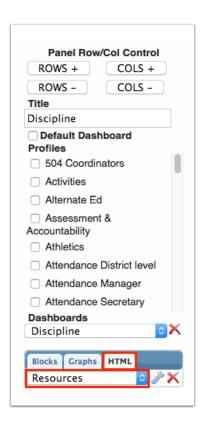


The HTML is displayed within the selected block.

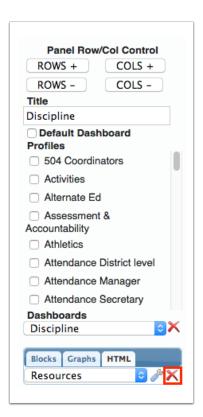


Deleting HTML from the HTML List

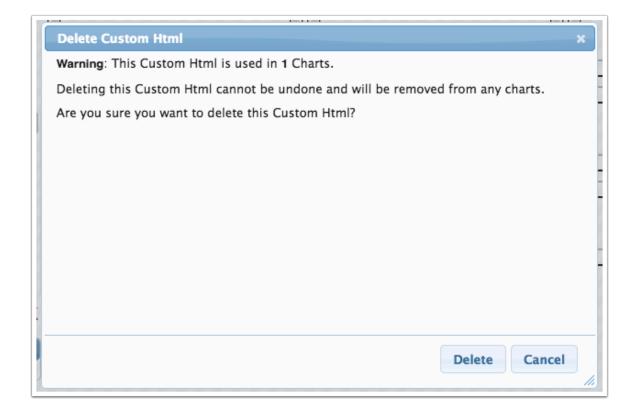
- 1. Click the **HTML** tab.
- **2.** Select the HTML from the pull-down.



3. Click the red **X** next to the pull-down.



A confirmation window is displayed, indicating how many times the HTML is being used and warning that deleting the HTML cannot be undone.

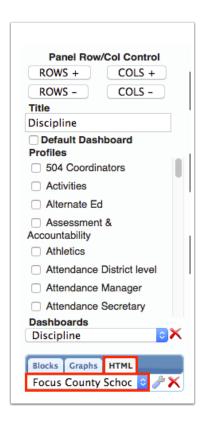


4. Click Delete.

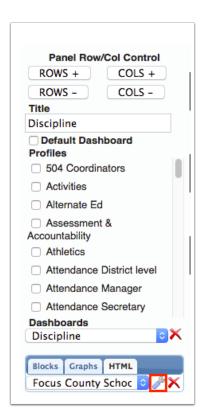
The custom HTML is removed from any dashboards where it is used and is removed from the HTML pull-down.

Editing HTML

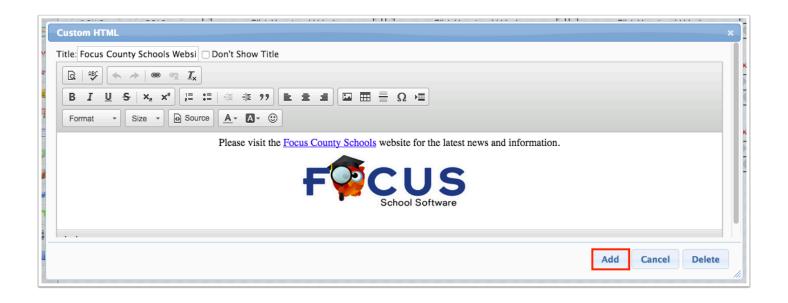
- 1. Click the **HTML** tab.
- **2.** Select the HTML from the pull-down.



3. Click the wrench icon next to the pull-down.



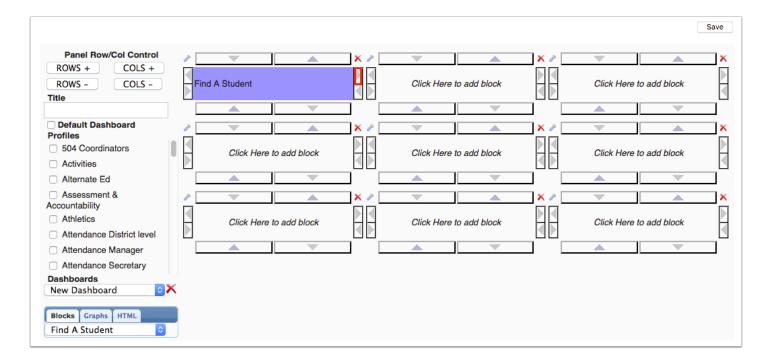
- **4.** In the Custom HTML pop-up window, make the edits as needed.
- 5. Click Add when finished.



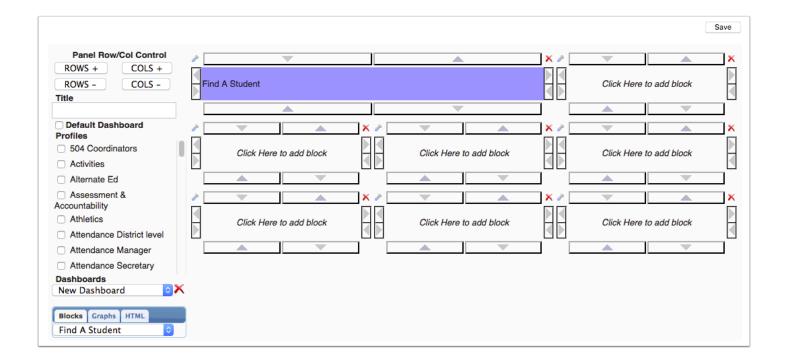
Resizing a Block

Blocks can be expanded to take up more than one row or column in the layout if more room is needed for a particular program, graph, or custom HTML.

Click the arrows around the block to resize the block in the appropriate direction. For example, to expand this block to take up two columns, click the right arrow.



The block adjusts to fit the area.



Deleting a Block

Click the red **X** to the right of the block.



The program, graph, or custom HTML is removed from the layout.