

Portfolio Administration Tools (1 of 2)

Administration Tools help Staff and Administrators organize and manage portfolios and view data on program usage at their site. Through these tools you can look up usernames, reset passwords, create portfolios, assign portfolios to one or more groups, send messages, set up custom features, and generate reports. You can also use the Administration Tools to upload courses available at your school for use in the Course Planner tool and develop custom checklists.

First, go to akcis.org and log in with your Administrator or Staff username and password.

The screenshot shows the 'DASHBOARD - ACPE TRAINING' interface. At the top is a blue navigation bar with tabs: Reports, Portfolios & Groups, Other Accounts, Customize, and Help & Links. Below the navigation bar, the dashboard is divided into several sections:

- Logins:** A table showing the number of logins since 8/1/2015 for different account types.

Account Type	Number of Logins since 8/1/2015
Portfolio	593
Site username or IP	39
Staff	117

[Go to full report](#)
- Portfolio Accounts:** A table showing the number of portfolios at the site.

Account Type	Number of portfolios at site
Active Portfolio	68
Portfolios created since 8/1/2015	37

[Go to full report](#)
- Quick Links:** A red box containing links to 'Reset Passwords', 'Find a portfolio', 'Curriculum', 'Tools for Counselors & Teachers', and 'Portfolio Privacy'.
- Modules with Saved Records:** A section partially visible at the bottom left.
- Advertisement:** A box on the right with the text 'Easily train your' and 'Use the Training click Tools for'.

The **Dashboard** displays, showing numbers and data about your site's logins, portfolios, and saved records. A Quick Links section also displays shortcuts to commonly used tools.

The **blue menu bar** displays the main tabs of the Administration Tools. Hover your mouse over each tab to see its menu.

The screenshot shows the 'Reports' tab selected in the blue navigation bar. The main content area is divided into eight sections:

- Summary:** Logins, Account Summary, Modules with Saved Records.
- Favorites:** Occupations, Programs of Study, Schools, Show All Favorites.
- Stored Files & Links:** Résumés, Files, Links.
- Sorts:** Financial Aid Sort, Occupation Sort, School Sort.
- Planning Tools:** Application Tracker, Career Plan, Checklist, Course Plan, Résumé Creator.
- Related Accounts:** Advisors, Parents, Visitors.
- Assessments:** Career Cluster Inventory, Entrepreneur's Quiz, Interest Profiler, Interest Profiler Short Form, Reality Check, SKILLS, Work Importance Locator, Learning Styles Survey.

In the **Reports** tab, Administrators and Staff can review information on site usage. The Report tab is divided into eight sections: Summary, Favorites, Stored Files & Links, Sorts, Planning Tools, Related Accounts, Assessments, and Other Reports.

Continued on next page

Portfolio Administration Tools (2 of 2)

The screenshot shows the 'Portfolios & Groups' tab selected in the navigation menu. The main content area is divided into four columns of options:

- Maintain Portfolio Accounts & Groups:**
 - Reset passwords.
 - Find, manage, and add portfolios.
 - Create and maintain groups.
- Reset Passwords:**
 - Reset Password for One User or by Group or Graduation Year
 - Reset Passwords for Multiple Users
- Access Portfolios:**
 - Find Individual Portfolio
 - Search Portfolios
- Add Portfolios:**
 - Add One Portfolio
 - Upload Several Portfolios
- Manage Active Portfolios:**
 - View, Edit, Show Files, Reset Password(s)
 - Reset Password(s)
 - Hide Portfolios
 - Transfer to Another Site
 - Merge Portfolios
 - Assign an Advisor
 - Create or Edit a Parent Account
 - Activate Assigned Checklists
 - Do All Portfolio Tasks
- Manage Hidden and Deleted Portfolios:**
 - View Hidden Portfolios
 - View Deleted Portfolios
- Maintain Groups:**
 - Add New Group
 - Edit or Delete a Group
 - View or Edit Group Membership

In the **Portfolios & Groups** tab, Administrators and Staff can reset passwords, manage and add portfolios, and create and manage groups. This tab is divided into six sections: Reset Passwords, Access Portfolios, Add Portfolios, Manage Active Portfolios, Manage Hidden and Deleted Portfolios, and Maintain Groups.

The screenshot shows the 'Other Accounts' tab selected in the navigation menu. The main content area is divided into three columns of options:

- Staff, Parent, and Advisor Accounts:**
 - Reset passwords for staff and parent accounts.
 - Add new staff and parent accounts.
 - Manage advisor accounts.
- Maintain Staff Accounts:**
 - Reset Password for Staff Accounts
 - Add New Staff Accounts
 - View or Edit Staff Accounts
- Maintain Parent Accounts:**
 - Create Parent Account for Portfolio or Create Parent Account Upload Template
 - Upload Parent Accounts
 - Set Parent Account Introduction

In the **Other Accounts** tab, Administrators and Staff can manage Parent and Advisor accounts. Administrators can also manage Staff accounts here. Transactions include reset passwords and add and edit accounts.

The screenshot shows the 'Customize' tab selected in the navigation menu. The main content area is divided into three columns of options:

- Customize:**
 - Create, edit, and activate checklists.
 - Create and edit course planner content.
 - Set portfolio privacy options.
- Checklists:**
 - Create, Edit, and Export Checklists
 - Assign and Activate Checklists
 - View Checklist Requirements
 - Import Checklists
- Course Planner:**
 - Create and Edit Course Planner Content
 - Export/Import Course Planner Content
 - Set Course Planner Custom Link

In the **Customize** tab, Administrators and Staff can create, edit and activate Checklists. Administrators can also edit Course Planner content here.

The screenshot shows the 'Help & Links' tab selected in the navigation menu. The main content area is divided into three columns of options:

- Help & Links:**
 - Help and links for the administration tools.
- News:**
 - What's New?
- Tutorials & More:**
 - Tools for Counselors & Teachers
 - Curriculum
- Help & Feedback:**
 - Contact Us
 - ACRP Standards
 - Portfolio Privacy

The **Help & Links** tab provides links and tutorials, providing additional information such as curriculums and the Alaska Implementation Frameworks. This section includes a Contact Us link where you can email the AKCIS Help Desk for further assistance.