

# Collaboration Portal

As districts and schools expand their use of virtual learning and meeting platforms, there is an increased need for virtual collaboration. The Collaboration Portal is a feature that makes sharing, collaborating and electronically signing documents seamless and consistent for all users, including parents.

## Key Ideas

- ✓ Any documents processed within Frontline IEP/504/RTI can be added to the portal via an automated workflow and shared with recipients through a secure link.
- ✓ Any document in **PDF format** generated from an outside source (such as another district computer system or Word version) can be uploaded to the Collaboration Portal and sent through the secure link to the intended recipients.
- ✓ Recipients can open the document, review and sign it before submitting back to the district/school.
- ✓ Once submitted by the recipient, a signed copy can be downloaded, reviewed and saved for record keeping.
- ✓ Add student email address to the Master Demographics for students that you wish to send documents to through the Collaboration Portal.

District Setup	A
Creating a Document from Letters & Reports	B
Using Collaboration Portal from Outside Sourced Documents	C
Accessing/Viewing Documents in Collaboration Portal	D

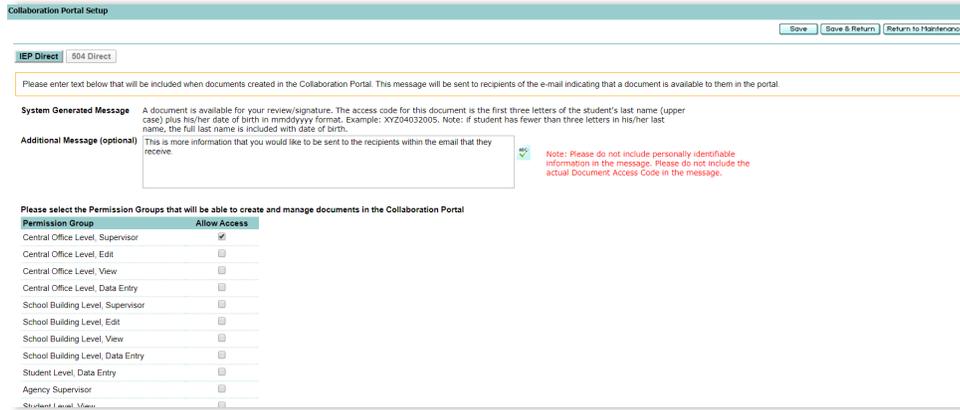
## Part A: District Setup

Complete the following steps to set up your district/school Collaboration Portal.

1. On the **Left-Side Navigation** click **Maintenance** tab and then **Other Maintenance Options**.
2. Navigate to the **Collaboration Portal** section.
3. Click on the link, **Collaboration Portal Setup**.
4. A System Generated Message is included at the top of the setup screen. Districts may add additional information in the **Additional Message** text box. This message will accompany each document shared on the portal. Users are also given the option to modify the additional message upon creating documents. **Please note, do not include student names or other identifiable information in this message.**
  - a. The message may be controlled by each application, so the message for IEP documents may be different for 504 and RTI products.
5. Districts/schools can determine which permission groups should have access to the **Collaboration Portal**. Please note, Central Office Supervisor permissions are the only



permission group allowed access by default. If the district wishes to turn on the portal for additional permission groups (i.e. Case Managers, Building Supervisors, etc.), the district/school must click on the radio button for each permission group. Once permission has been granted and the settings have been saved, that permission group will see **Collaboration Portal** when processing letters or reports.

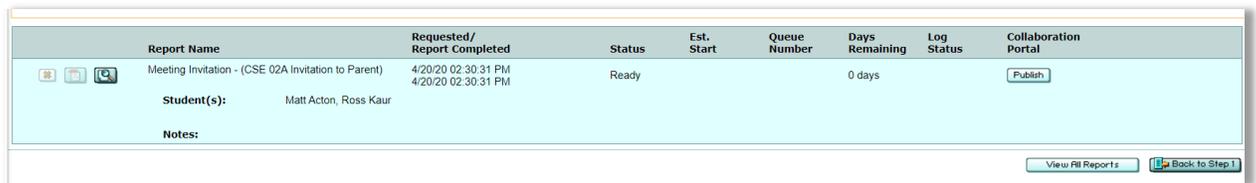


6. Once set up is complete, click **Save & Return**.

## Part B: Creating a Document from Letters & Reports

The following steps should be followed when creating a document that you wish to share via the Collaboration Portal.

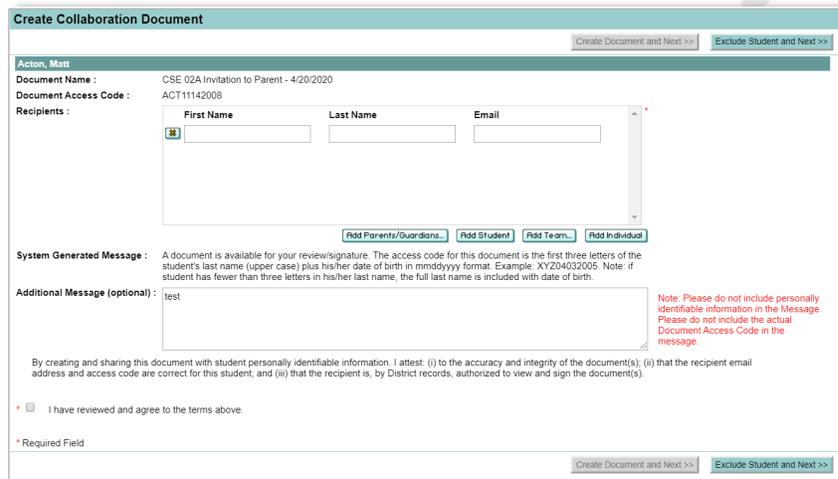
1. Select the student(s) on the **My Students** screen that you wish to process a letter or report for.
2. Click the **Letters & Reports** tab on the **Left-Side Navigation**.
3. Select **Letterhead** and **Signature**, if different than the default values that display.
4. Locate and select the document(s) that you wish to process and share.
5. Click **Process**. The **Processing Center** displays (the same as when you print a document).



Report Name	Requested/Report Completed	Status	Est. Start	Queue Number	Days Remaining	Log Status	Collaboration Portal
Meeting Invitation - (CSE 02A Invitation to Parent)	4/20/20 02:30:31 PM 4/20/20 02:30:31 PM	Ready			0 days		<a href="#">Publish</a>
<b>Student(s):</b>	Matt Acton, Ross Kaur						
<b>Notes:</b>							

6. Click **Publish**. The Collaboration Portal will open in new window displaying the first student.
7. Add Recipients by clicking the **Add Parents/Guardians**, **Add Team** and/or **Add Individual** buttons.
  - Clicking Add Team will add in all invitees from the latest scheduled meeting.
8. Type in other information to the **Additional Message** text box, if desired.
9. Check the box for the “I have reviewed and agree to the terms above” statement. Once this is checked, the **Create Document and Next>>** button will be enabled.



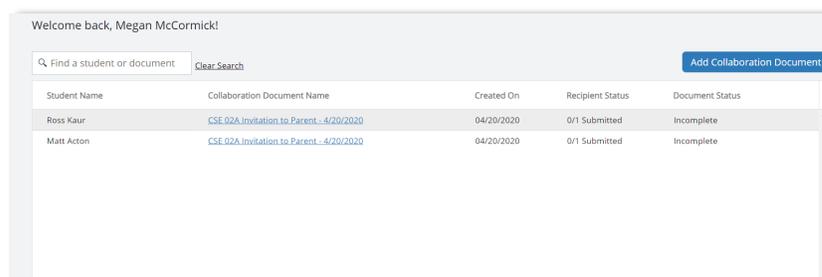


10. Click **Create Document and Next>>** button to proceed to the next student. Continue repeating steps 8-10 until all documents for the selected students have been processed.
11. On the review screen, the students that had documents sent successfully display. Click **Done** to close out of the screen.

### Part C: Using Collaboration Portal from Outside Sourced Documents

The following steps should be used when sending a document that has been generated/created from outside Frontline IEP, Frontline 504 and/or Frontline RTI:

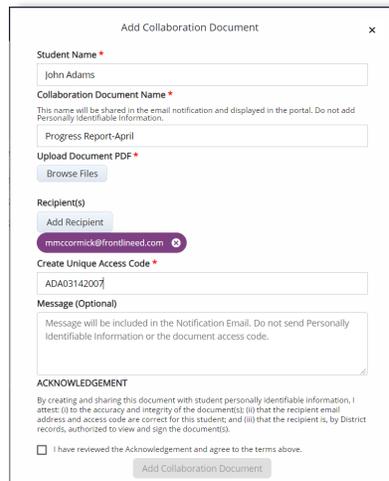
1. On the left side navigation, click **Maintenance** tab and then click **Other Maintenance Options**.
2. Navigate to the **Collaboration Portal** section.
3. Click **Collaboration Portal** link.
4. Click **Add Collaboration Document** button to begin.



Student Name	Collaboration Document Name	Created On	Recipient Status	Document Status
Ross Kaur	CSE 02A Invitation to Parent - 4/20/2020	04/20/2020	0/1 Submitted	Incomplete
Matt Acton	CSE 02A Invitation to Parent - 4/20/2020	04/20/2020	0/1 Submitted	Incomplete

5. A new window displays. Type in the **Student Name**, and **Collaboration Document Name** fields.
6. Click **Browse Files** button to locate the document you wish to send.
7. Click **Add Recipient** button. In the new pop up window, type in the recipient's email. Type the email again in the Confirm Email box and then click Save. For more than 1 recipient, repeat this step until all recipients are listed.



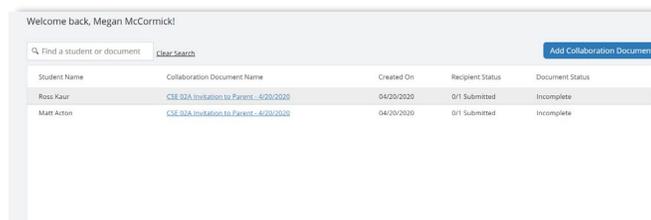


8. In the **Create Unique Access Code** field, type in the access code you wish the recipient to use to open the document once they receive it.
  - It is recommended that you use the same Code as when processing a letter or report to publish; first 3 letters of the student’s last name followed by the student’s Date of Birth. For example, John Adams document would have the code of “ADA03142007”.
9. In the **Message** text box, type in any additional information or instructions you wish. This is optional.
10. Check box for the “*I have reviewed and agree to the terms above*” statement. Once this is checked, the **Add Collaboration Document** button will be enabled.
11. Click the **Add Collaboration Document** button to finish sending the document.
12. Be sure to close the Collaboration Portal browser tab.

#### Part D: Accessing/Viewing in Collaboration Portal

The following steps should be used to access the **Collaboration Portal**.

1. On the left side navigation, click **Maintenance** tab and then click **Other Maintenance Options**.
2. Navigate to the **Collaboration Portal** section.
3. Click **Collaboration Portal** link.
4. A list of documents will display with details about the document. Details will include student name, document name, created on, recipient status, and document status.



Student Name	Collaboration Document Name	Created On	Recipient Status	Document Status
Ross Kaur	CSE 02A Invitation to Parent - 6/20/2020	04/05/2020	0/1 Submitted	Incomplete
Matt Arton	CSE 02A Invitation to Parent - 6/20/2020	04/05/2020	0/1 Submitted	Incomplete

**HINT:** you may need to expand the new window to see all details about the document(s).



5. Documents that have been signed or reviewed by all recipients will be marked “Completed”.
6. To download or view a document from the portal, click the document name.

You may also access the Collaboration Portal by clicking the ? near your name. Then click **Collaboration Portal**.

**Note:** Only documents that you (as user) have published/sent through the Collaboration Portal will display.

