

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.

This User Reference Guide is for use by non-CO Supervisor level permissioned staff.

Key Ideas

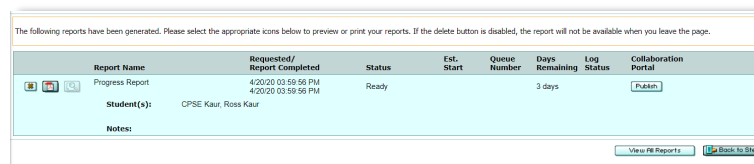
- ✓ Any documents processed within Frontline IEP/504/RTI can be added to the portal via an automated workflow and shared with recipients through a secure link.
- ✓ Recipients can open the document, review and sign it before submitting back to the district/school.
- ✓ Once submitted by the recipient, a signed copy can be downloaded, reviewed and saved for record keeping.

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

Part A: 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.

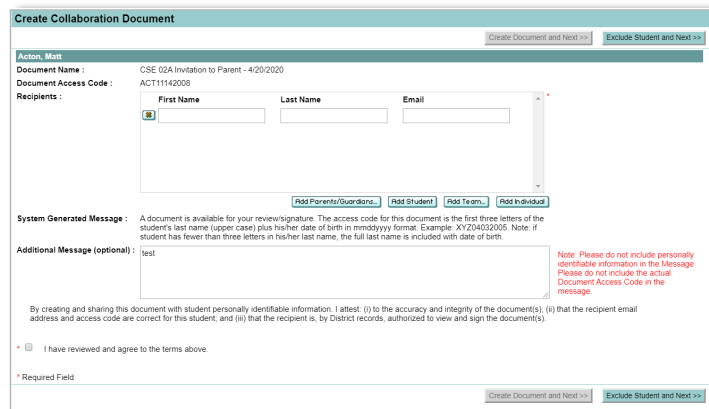
1. Select the student(s) on the **My Students** screen that you wish to process a letter or report for.
2. Click the **Letters & Reports** tab on the **Left-Side Navigation**.
3. Select **Letterhead** and **Signature**, if different than the default values that display.
4. Locate and select the document(s)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



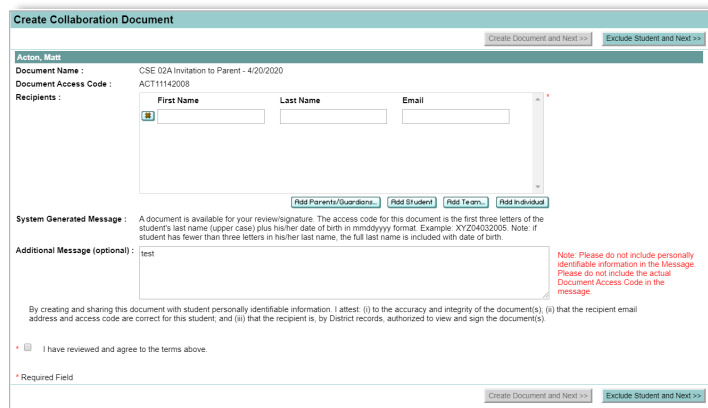
6. Click **Publish**. The Collaboration Portal will open in new window displaying the first student.



7. Add Recipients by clicking the **Add Parents/Guardians**, **Add Team**, and/or **Add Individual** buttons.
 - Clicking Add Team will populate the recipients 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 B: Using Collaboration Portal from Outside Sourced Documents

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

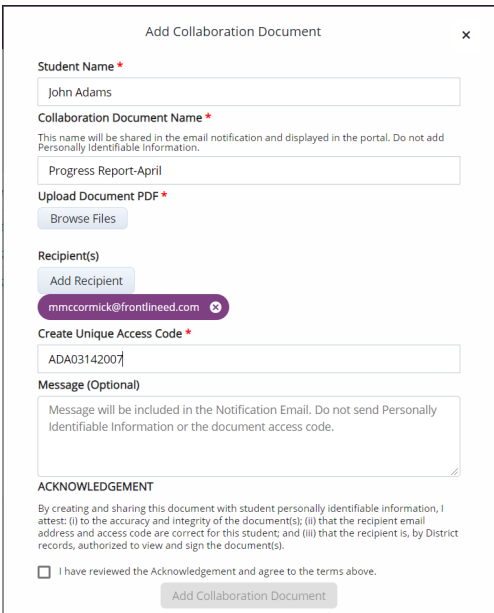
1. Click the **?** icon near your name.
2. Click the Collaboration Portal link.



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- Frontline Support
- Live Chat
- Document Translation
- Collaboration Portal

3. Click **Add Document** button to begin.
4. A new window displays. Type in the **Student Name**, and **Collaboration Document Name** fields.
5. Click **Browse Files** button to locate the document you wish to send.
6. Click **Add Recipients** 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.



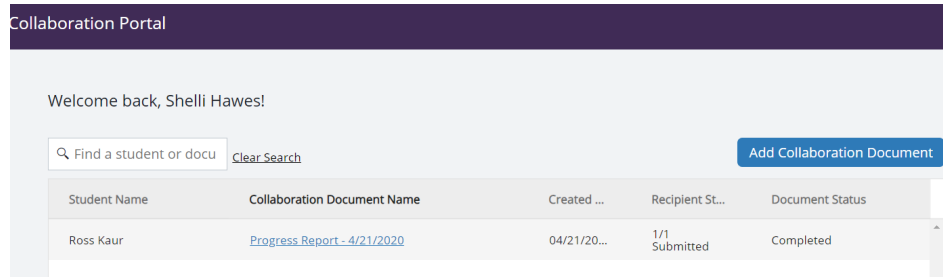
7. In the **Create Unique Access Code** field, type in the access code you wish the recipient to use to open the document once they receive it.
 - It is recommended that you use the same Code as when processing a letter or report to publish; first 3 letters of the student’s last name followed by the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



Part C: Accessing/Viewing in Collaboration Portal

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

1. Click the **?** icon near your name.
2. Click **Collaboration Portal** link.
3. 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.

A screenshot of the Collaboration Portal interface. At the top, there is a dark purple header with the text 'Collaboration Portal'. Below the header, a light gray area contains a welcome message: 'Welcome back, Shelli Hawes!'. Underneath the message is a search bar with the placeholder text 'Find a student or docu' and a 'Clear Search' link. To the right of the search bar is a blue button labeled 'Add Collaboration Document'. Below the search bar is a table with the following columns: 'Student Name', 'Collaboration Document Name', 'Created ...', 'Recipient St...', and 'Document Status'. The table contains one row of data: 'Ross Kaur', 'Progress Report - 4/21/2020', '04/21/20...', '1/1 Submitted', and 'Completed'.

Student Name	Collaboration Document Name	Created ...	Recipient St...	Document Status
Ross Kaur	Progress Report - 4/21/2020	04/21/20...	1/1 Submitted	Completed

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

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

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

