

ProgressBook StudentInformation Notifications Guide



ProgressBook StudentInformation Notifications Guide (This document is current for v18.1.0 or later.)
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Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation Notifications Guide* have been made.

Product Version	Heading	Page	Reason
N/A	"District Settings"	10	Added note.
N/A	"Building Settings"	12	Added note.
18.1.0	Entire Guide	N/A	Created guide.

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Overview

Notifications provide a quick way for districts to communicate key events to members of the district. Notification rules are either required, optional, or disabled at the district, building, and/or individual level, and a combination of these configurations determines if a user can receive or subscribe to a notification.

In addition to setting up notification rules, users must also have the proper security settings in order to receive notifications. Depending on the rule, users must have the corresponding resource permission enabled and be assigned the correct job function(s).

- To set up job functions for users, see "Set Up Job Functions."
- To set up resource permissions for users, see "Set Up Resource Permissions."
- To configure rules at the district level, see "District Settings."
- To configure rules at the building level, see "Building Settings."
- To configure rules at the user level, see "Subscription List."
- To view notifications, see "Receiving In-app Notifications" and "Notification List."
- To view details regarding the events that generate notifications and job functions to which the rules apply, see "Appendix: Job Functions & Rules."

Security Settings

After the notification rules are configured at the district, building, or individual level (see "District and Building Settings" and "User Settings"), in order for users to receive the notifications, they must also have the proper job function(s) assigned and resource permission(s) enabled. To understand which job functions and resource permissions apply to each notification rule, see "Appendix: Job Functions & Rules."

- To assign job functions to staff members, see "Assign Job Functions to Staff Members."
- To create or edit user roles to enable notification resource permissions, see "Create/Edit User Role."
- To assign roles to users, see "Assign Role to Users."

Set Up Job Functions

You must assign job functions directly to individual staff members.



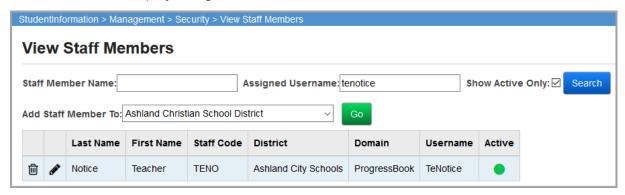
Caution: Do not use user groups to assign job functions. Job functions assigned this way do not work with notifications.

Assign Job Functions to Staff Members

Navigation: StudentInformation - Management - Security - View Staff Members

1. Enter the **Staff Member Name** or **Assigned Username** and click **Search** to locate the staff member.

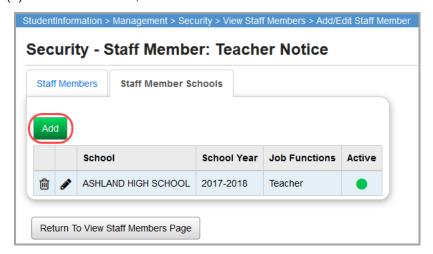
The results display in a grid.



In the row of the staff member you wish to modify, click .

The add-edit version of the screen displays.

3. Click the **Staff Member Schools** tab. If the user does not already have the appropriate job function(s) within the school, click **Add**.



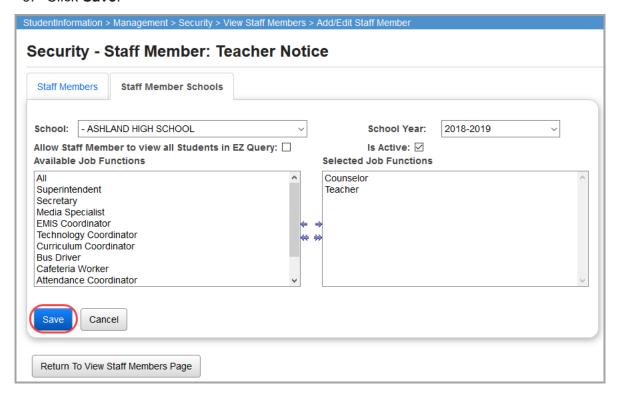
The add-edit version of the tab displays. For more details regarding the fields on this tab, see the *ProgressBook StudentInformation Security Guide*.

- 4. In the **School** drop-down list, select the school to which the job function of the staff member should apply.
- 5. In the **School Year** drop-down list, select the school year to which the job function of the staff member should apply.

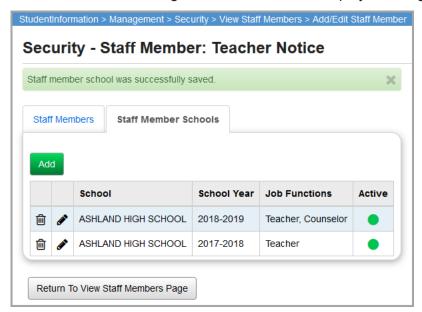
Note: Each staff member may have only one record per school year.

- 6. Select the **Allow Staff Member to view all Students in EZ Query** check box if you wish for them to be able to do so. For more details regarding the functionality of this check box in relation to the job functions selected, see the *ProgressBook StudentInformation Security Guide*.
- 7. Leave the **Is Active** check box selected to have this job function active for the school and school year combination you selected above.
- 8. In the **Available Job Functions** dual listbox, select the job functions you wish to associate with this staff member, then click \Rightarrow to move them to the **Selected Job Functions** dual listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move students between the two dual listboxes.)

9. Click Save.



You receive a confirmation message and the new record displays in the grid.



Set Up Resource Permissions

To ensure users have the correct resource permissions enabled, you must first create a new role and then associate it with them or edit an existing role associated with the user(s).

Create/Edit User Role

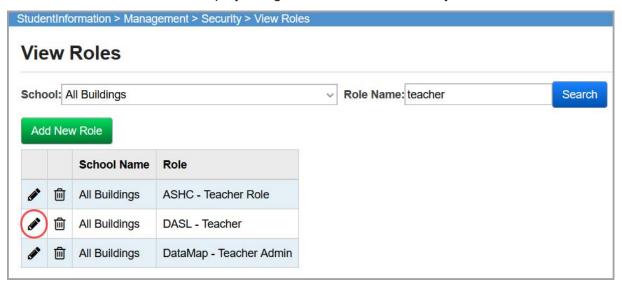
Navigation: StudentInformation - Management - Security - View Roles

- 1. You can add a new role or edit an existing one according to the following steps:
 - To add a new role, click Add New Role.



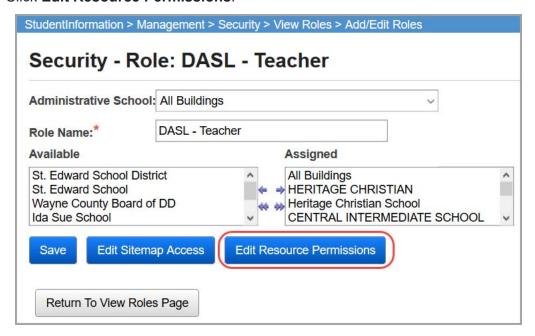
To edit an existing role, in the Role Name field, enter the name of the role you wish to
edit and then click Search.

The search results display in a grid. In the row of the role you wish to edit, click 🔗.



The add-edit version of the screen displays.

2. Click Edit Resource Permissions.



The Edit Permissions for [Role] screen for this role displays.

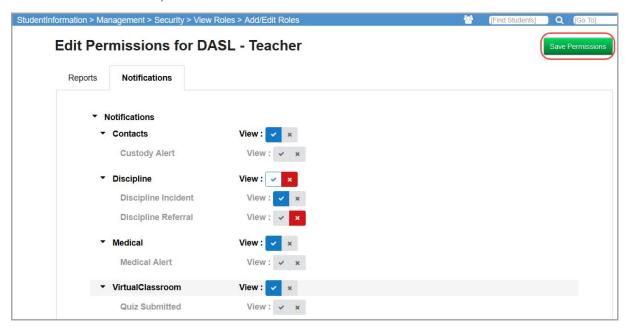
3. Click the **Notifications** tab.

The tab displays the notification resource permissions with the **View** access settings in front of each node. The notification resources are displayed alphabetically within each level of the hierarchy. Access for a node can be toggled between Open, Shut, and Clear by clicking the space or icon to the right of each access setting name. You can also see hierarchical access for items that are not expanded (Open below, Shut below).

- Open Indicates that the user with this role can subscribe to this notification rule
 or all notification rules nested under this notification category in StudentInformation.
- Open below ____ Indicates that the user with this role can subscribe to at least one notification rule nested under this notification category in StudentInformation.
- Shut Indicates that the user with the role cannot subscribe to this notification rule or cannot subscribe to any notification rules nested under this notification category in StudentInformation.
- Shut below ___ Indicates that the user with the role cannot subscribe to at least one rule nested under this notification category in StudentInformation.
- Clear Indicates that the access is neither allowed nor restricted to this node.

The nodes can be expanded and collapsed using ▶ and ▼ to the left of the nodes.

4. Once you have enabled or disabled access to particular notification categories and/or rules for this role, click **Save Permissions**.



You receive a confirmation message.

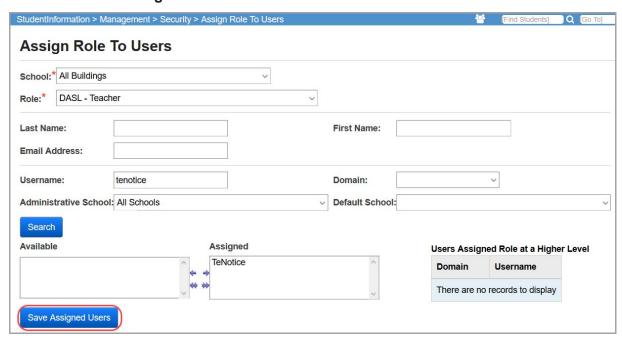
Success! The role permissions were successfully saved.

Assign Role to Users

Navigation: StudentInformation - Management - Security - Assign Role to Users

- 1. In the **School** drop-down list, select the school in which the role resides.
- 2. In the **Role** drop-down list, select the role you wish to assign to the user.
- 3. In the search fields, enter information to locate the user(s), and then click **Search**. The results display in the **Available** dual listbox on the left.
- 4. Select the user(s) to which you wish to add the role, then click ⇒ to move them to the **Assigned** dual listbox on the right. (You can hold down CTRL or SHIFT to make multiple selections and use any of the arrow icons to move groups between the two dual listboxes.)

5. Click Save Assigned Users.



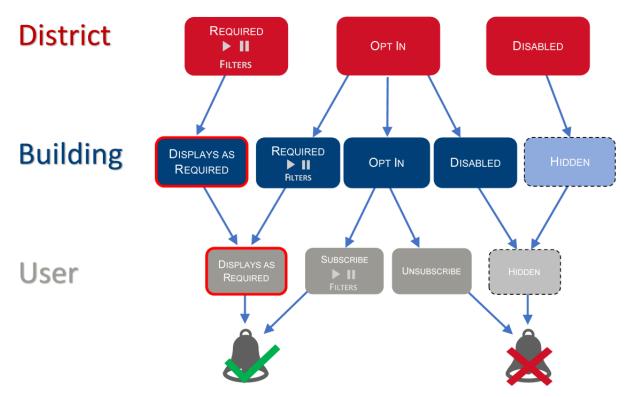
You receive a confirmation message.

The users were successfully assigned to the role

District and Building Settings

At the highest level, districts can configure all notification rules as **Required**, **Opt-In**, or **Disabled** and this affects which rules buildings can configure. Subsequently, the building configuration determines the rules to which the user can optionally subscribe. Thus, depending on the district or building setting for each rule, users may automatically receive or not receive notifications for these rules, or they may be able to optionally subscribe to receive the notifications.

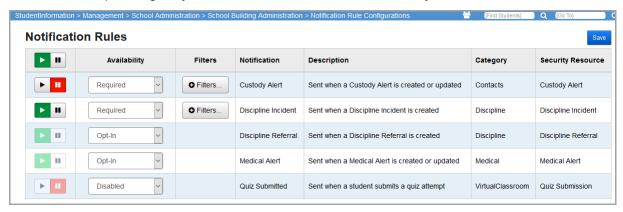
The graphic below outlines how choices made at the district, building, and user level affect whether or not users receive notifications; the level at which notifications can be temporarily turned off or on; and the level at which filters can be set.



District Settings

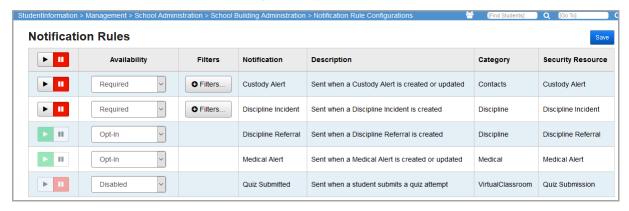
Navigation: StudentInformation – Management – School Administration – School Building Administration – Notification Rule Configuration

With a district in context, you can set all notification rules as **Required**, **Opt-In**, or **Disabled** at the district level. Depending on your selection, the **Filters** column may become available.



Play/Pause Column – You can temporarily turn notifications for certain rules off or on by clicking or in this column.

Note: You can click or in the header row to turn notifications off or on for all rules that have an **Availability** of **Required** at the district level.



- Displays if a rule has an Availability of Required and indicates that all users with the correct resource permissions (see "Set Up Resource Permissions") and job functions (see "Set Up Job Functions") will receive the notifications for this rule when the corresponding events occur. You can click to turn off notifications for this rule (indicated by and users no longer receive any notifications for this rule until it is turned back on by clicking.
- Displays if a rule has an Availability of Opt-In and indicates that you cannot turn notifications off or on at this level but may do so at a lower level.

• Displays if a rule has an **Availability** of **Disabled** and indicates that you cannot turn notifications on or off at this level and lower.

Availability – Select from Required, Opt-In, or Disabled.

- Required Indicates that all users in the district with the correct resource permissions (see "Set Up Resource Permissions") and job functions (see "Set Up Job Functions") will receive notifications for this rule when the corresponding events occur. Buildings and users may not opt out of receiving these notifications.
- Opt-In Indicates that each building can decide if they wish to have an Availability of Required, Opt-In, or Disabled (see "Building Settings").
- Disabled Indicates that no one in the district will receive notifications for this rule.

Note: If you disable a notification rule, all previously selected building and user settings are cleared.

Filters – If the rule has an Availability of Required, you can click filters.... to configure the filters for this rule at the district level; otherwise, the field is blank. Filters narrow down the event requirements that generate a notification. For example, if you want users to receive discipline incident notifications when they occur for only grade 9 students, you would select grade 9 under the Grade Level filter. Or, if you want users to only receive quiz submissions that must be manually graded, under the Scoring Method filter, select Manually Graded Only; otherwise, to have users receive quiz submissions for both manually graded and auto-scored quizzes, select None Selected.

Notification – Indicates the rule name.

Description – Indicates the type of event(s) that generates notifications for this rule.

Category – Indicates the category to which the rule belongs.

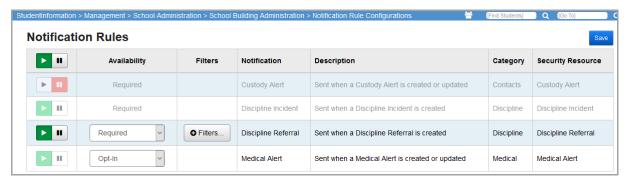
Security Resource – Indicates the corresponding resource permission a user needs to receive a notification for this rule (see "Set Up Resource Permissions").

Save – Click to retain the changes you have made.

Building Settings

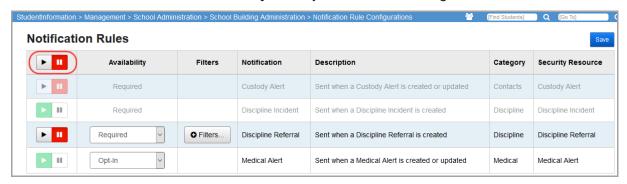
Navigation: StudentInformation – Management – School Administration – School Building Administration – Notification Rule Configuration

With a building in context, you can set if a notification rule is **Required**, **Opt-In**, or **Disabled** at the building level. Depending on your selection, the **Filters** column may become available. If a rule was set as **Required** at the district level, it displays as grayed out as you cannot change settings for such rules but will receive notifications for them.



Play/Pause Column – You can temporarily turn notifications for certain rules off or on by clicking or in this column.

Note: You can click or in the header row to turn notifications off or on for all rules that have an **Availability** of **Required** at the building level.



- Displays if a rule has an **Availability** of **Required** and indicates that all users with the correct resource permissions (see "Set Up Resource Permissions") and job functions (see "Set Up Job Functions") will receive the notifications for this rule when the corresponding events occur. You can click to turn off notifications for this rule (indicated by and users no longer receive any notifications for this rule until it is turned back on by clicking.
- Displays if a rule has an Availability of Opt-In at this level or an Availability of Required at a higher level and indicates that you cannot turn notifications off or on at this level but may do so at a higher or lower level.

• Displays if a rule has an **Availability** of **Disabled** at this level and indicates that you cannot turn notifications on or off at this level or lower. This also displays if a rule has an **Availability** of **Required** at a higher level and was turned off.

Availability – Select from Required, Opt-In, or Disabled.

- Required Indicates that all users in the building with the correct resource permissions (see "Set Up Resource Permissions") and job functions (see "Set Up Job Functions") will receive notifications for this rule when the corresponding events occur. Users may not opt out of receiving these notifications.
- **Opt-In** Indicates that each user can decide if they wish to subscribe to a notification rule (see "Subscription List").
- Disabled Indicates that no one in the building will receive notifications for this rule.

Note: If you disable a notification rule, all previously selected user settings are cleared.

Filters – If the rule has an Availability of Required, you can click filters... to configure the filters for this rule at the district level; otherwise, the field is blank. Filters narrow down the event requirements that generate a notification. For example, if you want users to receive discipline incident notifications when they occur for only grade 9 students, you would select grade 9 under the Grade Level filter. Or, if you want users to only receive quiz submissions that must be manually graded, under the Scoring Method filter, select Manually Graded Only; otherwise, to have users receive quiz submissions for both manually graded and auto-scored quizzes, select None Selected.

If filters for a required rule have been set at the district level, you can click Filters to view the settings.



Notification – Indicates the rule name.

Description – Indicates the type of event(s) that generates notifications for this rule.

Category – Indicates the category to which the rule belongs.

Security Resource – Indicates the corresponding resource permission a user needs to receive a notification for this rule (see "Set Up Resource Permissions").

Save – Click to retain the changes you have made.

User Settings

Depending on the settings for each notification rule at the district and building level (see "District and Building Settings"), users can choose to subscribe to certain notifications or automatically receive them. Users receive automatic or subscribed notifications if they have the proper security settings (see "Security Settings").

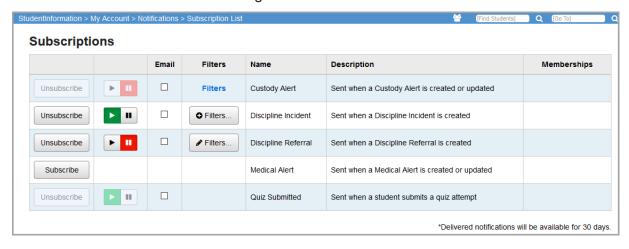
- To set up user subscriptions, see "Subscription List."
- To view in-app notifications, see "Receiving In-app Notifications."
- To view notification history, see "Receiving In-app Notifications."

Subscription List

Navigation: StudentInformation - My Account - Notifications - Subscription List

You can view and manage your subscriptions to notifications on this screen. If a notification rule has been set as **Required** at the district or building level, you will receive the notifications and cannot opt out of them. Otherwise, if a notification rule has been set as **Opt-In** at the building level, you can choose to subscribe to such notifications. For more information on notification rules and district and building settings, as well as how they affect user subscriptions, see "District and Building Settings."

Note: You must also have the proper job function(s) assigned and resource permission(s) enabled (see "Security Settings") for each corresponding notification rule in order to configure them on this screen and receive notifications.



Subscribe/Unsubscribe Column – You can subscribe or unsubscribe to available notification rules by clicking **Subscribe** or **Unsubscribe**.

Play/Pause Column – You can temporarily turn notifications off or on for rules to which you have subscribed by clicking or in this column.

- Displays if you have subscribed to this rule and you will receive the notifications for this rule when the corresponding events occur. You can click to turn off notifications for this rule (indicated by) and you no longer receive any notifications for this rule until it is turned back on by clicking .
- Displays if a rule is required and indicates that you cannot turn notifications off or on at this level but an administrator may do so at a higher level.
- Displays if a rule is required and an administrator at a higher level has temporarily turned notifications off for this rule.

Email – Select this check box if you wish to receive email alerts in addition to in-app notifications for this notification rule. The emails are sent to the email address associated with your account.

Filters – If you have subscribed to a rule, you can click of this rule. Filters narrow down the event requirements that generate a notification. For example, if you want users to receive discipline incident notifications when they occur for only grade 9 students, you would select grade 9 under the **Grade Level** filter. Or, if you want to only receive quiz submissions that must be manually graded, under the **Scoring Method** filter, select **Manually Graded Only**; otherwise, to receive quiz submissions for both manually graded and auto-scored quizzes, select **None Selected**.

If filters for a required rule have been set at a higher level, you can click Filters to view the settings.



Name – Indicates the rule name.

Description – Indicates the type of event(s) that generates notifications for this rule.

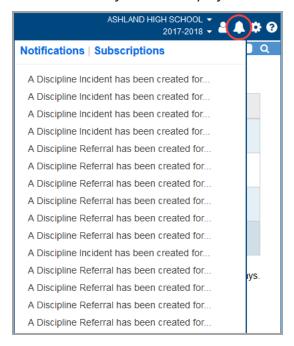
Memberships – If you have subscribed to a rule, you can further narrow down the notifications you receive according to selected private and public ad hoc membership(s).

Note: As of ProgressBook Suite v18.1.0, no notification rules allow membership filtering. Future releases may introduce this functionality.

Receiving In-app Notifications

The StudentInformation and GradeBook masthead display of for notifications. Whenever you receive a new notification, displays instead. You can click to view the 15 most recent notifications.

Note: Notifications older than 30 days do not display in this list.



To see a list of all notifications you have received in the last 30 days, click **Notifications** (see "Notification List").

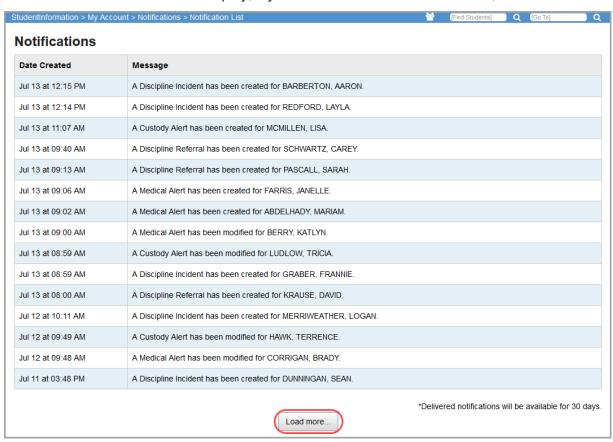
To manage your subscriptions, click **Subscriptions** (see "Subscription List").

Notification List

Navigation: StudentInformation - My Account - Notifications - Notification List

You can access this screen through the StudentInformation navigation or by clicking and then **Notifications**.

On this screen, you can view all notifications you have received for the last 30 days. All notifications older than 30 days are automatically deleted. When you first access this screen, only the 15 most recent notifications display; if you wish to view older notifications, click **Load more...**



Appendix: Job Functions & Rules

Job Function Parameters

This section explains the parameters that must align in StudentInformation in order for a user with the corresponding job function to receive a notification for a student, assuming all other settings for notifications are correct.

Teacher

Users with the **Teacher** job function receive a notification for a student when all of the following conditions are met:

- Teacher is in the active school year.
- Teacher is an active staff member within an active school and school term.
- Teacher is the teacher of record for at least one of the course section(s) the student attends.
- The event that generates the notification is entered into the system within the school year's start and stop dates.

Note: For the **Quiz Submitted** rule, only the teacher of record for the course in which the student submits a quiz receives the notification.

Counselor

Users with the **Counselor** job function receive a notification for a student when all of the following conditions are met:

- Counselor is in the active school year.
- Counselor is an active staff member within an active school.
- Counselor is the designated counselor for the student.
- The event that generates the notification is entered into the system within the school year's start and stop dates.

Principal

Users with the **Principal** job function receive a notification for a student when all of the following conditions are met:

- Principal is in the active school year.
- Principal is an active staff member within an active school.
- The event that generates the notification is entered into the system within the school year's start and stop dates.

Secretary/Nurse

Users with the **Secretary/Nurse** job function receive a notification for a student when all of the following conditions are met:

- · Secretary/Nurse is in the active school year.
- Secretary/Nurse is an active staff member within an active school.
- The event that generates the notification is entered into the system within the school year's start and stop dates.

StudentInformation Notification Rules

Name	Category	Users with these Job Functions receive the notification	Resource Permission	Filters	Event	
Custody Alert	Contacts	PrincipalCounselorSecretaryTeacherNurse	Custody Alert	Grade Level Critical	A custody alert was created or modified.	
Message	A Custody Alert has been created/modified for <student name=""></student>					
Discipline Incident	Discipline	Principal Counselor Teacher Discipline Referral creator (if applicable)	Discipline Incident	Grade Level	A discipline incident was created with a disciplinary action added in StudentInformation or the MobileApp.	
Message	A Discipline Incident has been created for <student name=""></student>					
Discipline Referral	Discipline	Principal Counselor Teacher	Discipline Referral	Grade Level	A discipline referral was created in StudentInformation or GradeBook.	
Message	A Discipline Referral has been created for <student name=""></student>					
Medical Alert	Medical	PrincipalCounselorSecretaryTeacherNurse	Medical Alert	Grade Level Life Threatening	A medical alert was created or modified.	
Message	A Medical Alert has been created/modified for <student name=""></student>					

GradeBook and VirtualClassroom Notification Rules

Name	Category	Users with these Job Functions receive the notification	Resource Permission	Filters	Event
Quiz Submitted	VirtualClassroom	• Teacher	Quiz Submitted	Scoring Method	Student submits a quiz attempt. Only the teacher of record of a particular course section for the active term receives a notification when a student in that course section submits a quiz activity.
Message	<student name=""> submitted <assignment name=""></assignment></student>				