Lesson - Using portals

Using your home portal

The first screen that loads is your home portal. This will be either a default setting or set for your user.

The title of the portal appears at the top of the window.

Portals can be set up in groups. These will be shown as tabs.

- Click on the tab's title to view the portal.

Viewing components

The parts of the portal are called components.

- Scroll down to view all the components of the portal.

Lists of items

Some components are a list of items:

- Click on the **Code & Title** of the item.

  The item opens.

- Click the back button on your browser to return to the list.

  If there are too many items to display all at once, there will be a page navigator.

- Click the arrows to display the different pages.

  Some lists can be filtered.

- Click the **Filter** button at the bottom of the list (▼).

- Select the options to filter the list.
  The options will vary depending on the list that you use.
- Click the **Close** button.

The filter will be applied automatically.

What happens if there are no items matching your filter?

Note: the filters that you have applied will remain in place even when you log out.
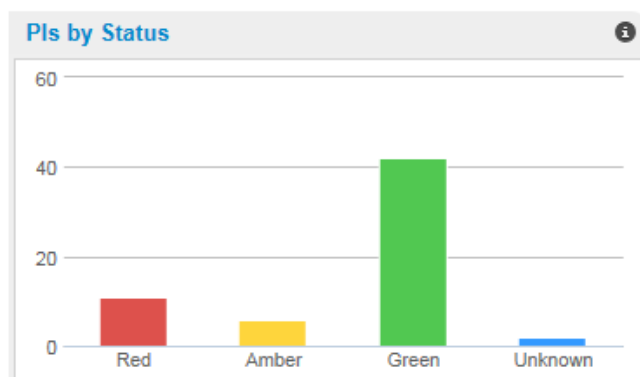
Updating items

- Find an item that requires an update
  It will have a clock icon on the row
- Right- click on the row

If you right-click on an item, you will get the option to update it or to open it in a new tab or window.

- Select the option to **Edit**, **Update** or add a **New Assessment**
- Enter the details on the pop-up window
- Click the **Save & Close** button

The item is updated with the new information.

Charts

- Click on a part of the chart.

  A list of items opens. These are the items that make up that part of the chart.

What other types of component are shown in your portal? What happens when you click on them?

Opening other portals

- Click the **Go To** button at the top of the screen.
- Select **Portals** on the menu

  A list of portals that you can see is displayed.
- Select a portal on the list.

  The portals may be one page or may be a group of portals.