

## Creating Parent/Student Access Accounts and Letters

*Note: These instructions are based on using Microsoft Word 2003 and Excel 2003. Any variations from these instructions will not be supported by OME-RESA and will require the user to research an alternative method of creating the same. Notify OME-RESA that you will be using Parent/Student access and we will work with you to put your district logo on the Login page.*

Once your district decides to utilize the access for parent/students to Progress Book, you will need to follow these steps to create the accounts and the letters for their login procedures:

1. Log in to your PB admin account and click on the link to "Create User Accounts" from the administrator home page.

The following message will appear:

This program will create parent and student accounts for the Parent Access system.

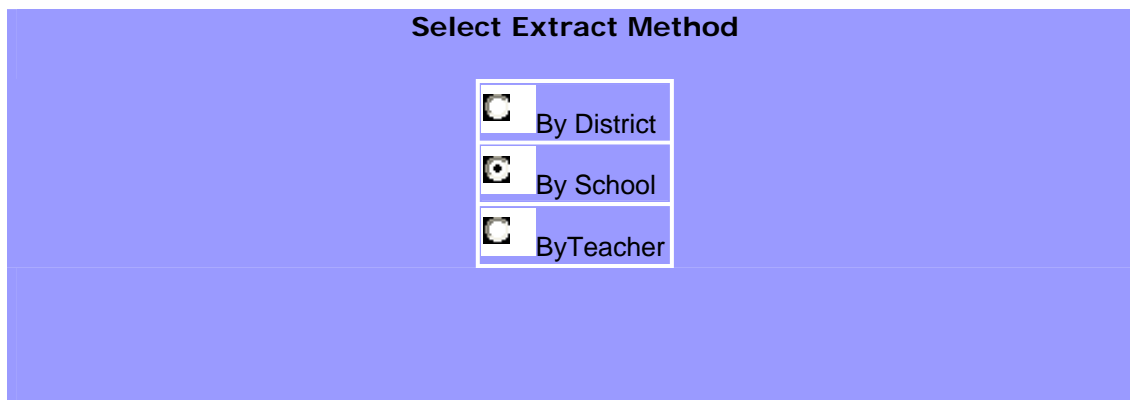
If an account already exists, it will not be deleted or changed.

Click on the button to "Create Accounts"

The following message will appear:

**The accounts have been created!**

2. Once the accounts are created, you will need to extract the account information in order to create the parent/student letters. Click on the option to "Extract Data for Letters" from the administrator home page. The following screen will appear:



**Select Extract Method**

By District

By School

ByTeacher

**Parent\Student Accounts**

<input checked="" type="checkbox"/>	Parent Accounts
<input type="checkbox"/>	Student Accounts

**Select Dates:**  
**Enter a Range:**

Start Date:	<input type="text"/>
End Date:	<input type="text"/>

Select the appropriate options and date range (if desired, i.e. to select accounts that you created just today rather than all accounts at once) and click "Next" to continue.

The following screen will allow you to select specific or all buildings that you want to extract from. Click on the ones that you want and then click "Submit" to complete the extract. The extract will run and will pop up a screen of raw data. You will then need to click at the top of your window on "File" and "Save As". Put the file in a place where you'll remember it on your computer and name it appropriately. Be sure that you save the file as file type TXT.

3. Once you have completed the extract and saved the data from the steps above, you must then pull that data into an Excel spreadsheet by completing the following steps:
  1. Open a new Excel spreadsheet.
  2. Click on the "Data" tab at the top of the screen and select "Import External Data" and then "Import Data"
  3. A box will appear asking you to select the data to import. At this point, you must select the TXT file from the location that you saved it in the steps above.
  4. A "Text Import" 1 of 3 Wizard box will then appear and ask for what type of data you're importing...you need to reply that it is "Delimited" and click "Next".
  5. The "Text Import" 2 of 3 Wizard will appear asking for the type of delimiter used in the data...you will need to click the box for "Comma" only and click "Next".
  6. Click "Finish" to complete the Text Import Wizard.

7. A box will then appear asking where to put the data on the spreadsheet, just click "Ok" and you will then see the data pulled from the TXT file into the spreadsheet.
  8. At this point, click on "File" and then "Save" from the top of the screen and save the file in a location and under a name you'll remember for later.
4. Download the sample letter for Parents or Students from our website. The parent letter is displayed below:

To the Parents/Guardian of:           «Firstname» «Lastname»  
School:                                   «School»  
Grade:                                   «Grade»

Sample School District, in cooperation with OME-RESA, is introducing District Link, a product that allows parents and students to access classroom information using the internet.

As a parent or student, you will be able to view homework assignments, view messages from our teaching staff, view cumulative progress of your child, and maintain your login account.

The following instructions will log you on and give you access to your child's performance:

1. Using any Web Browser, enter the URL <https://pbparent.omeresa.net>
2. Locate and click on the icon associated with Sample School District.
3. You will be requested to enter a Username and Password. To gain access to student progress for «Firstname» «Lastname», please enter the following:

Username:   «UserId» (Use proper case as shown)  
Password:   «password» (Use proper case as shown)

4. Once you have successfully entered your login, you will be able to perform additional tasks that will simplify future logins to District Link. You will be able to enter contact information specific to your account (email address), change your login name and password to something more meaningful, and if you have more than one child in the district (and request access forms for those children), link additional children to your account.

We are excited to participate in this project. If you have any questions, please refer to the cover letter enclosed with this notification.

Note: Whether you are creating Parent letters or Student letters, the instructions are the same. The only difference is in which file you download from the website and use.

5. Open the letter file and you will be prompted as to whether you want to run a SQL command, etc, simply answer Yes to continue.
6. Once you download and open the file, replace "Sample School District" with your district's name (2 places) and save your changes.
7. Then click on "Tools" from the top of the page in Word, "Letters and Mailings", and then "Mail Merge". A box will appear alongside your letter on the screen where you will work to complete the merge of the data with the letter. In this box, click on "Next: Write your letter". A box will pop up requesting the data source. Navigate to your saved Excel spreadsheet from the earlier step and open it. A box will then appear asking you to select the table. Click "OK" to continue. Next, a box will appear showing the mail merge recipients. Everyone on the list should already be selected, if not, click "Select All" and then "OK" to continue. Click "Next: Write your letter" again. Then click "Next: Preview your letters". A box will pop up telling you "Invalid Merge Field". In fact, this will happen four times. You will need to match the field names from the incoming list to the field names used within the letter as follows:

School -> Schoolname (Select Schoolname from the dropdown box and then click "OK" to continue)

Grade -> Gradelevel (Select Gradelevel from the dropdown box and then click "OK" to continue)

UserId -> Loginname (Select Loginname from the dropdown box and then click "OK" to continue)

Password - > Loginpswd (Select Schoolname from the dropdown box and then click "OK" to continue)

Click "Next: Complete the merge" and then click "Edit individual letters". A box will appear asking what records to merge, select "All" and click "OK" to continue. At this point, all letters are being merged and created. In fact, the program will open a new file (note at the top of the Word screen) called "Letters1". You will need to save this file under a meaningful name and in a place you'll remember. You can then print this file on your district letterhead and distribute to the parents/students.