

## TUTORIAL TEXT – PORTAL NAVIGATION

### INTRO

This tutorial will demonstrate how to navigate the new Perkins V Postsecondary Portal. Currently the Local Application is the only active module, but additional tutorials will be provided as new modules are added.

### LOCATION





The Portal can be accessed in two ways:

- By direct link at <https://arc.arkansas.gov/perkins/portal/home>
- Through the adheperkins.com website under the Portal tab

### WELCOME/LOGIN PAGE

- Email: This is the email of the user
- Password: Default is Welcome22; will need to change upon initial access
- **Request Account:**
  - Setting up new users was a manual process in the past.
  - In this portal, click Request Account and you will be taken to an email screen.
  - The request for an account is already entered but you need to add the User Name, User Email, User Phone and the level of access requested. (Coordinator, Fiscal Coordinator, Read Only
  - Click send and the email will be sent to state staff who will provide the access and notify when complete.
  - Portal will remain on a blank screen since you cannot go further in the portal until the account is set up.
- **Reset Password:**
  - Click Reset Password and you will be taken to an email screen.
  - Same process as Request Account
  - Reset Password is used when you are not able to enter the Portal at all

### DASHBOARD

- The **Dashboard** provides access to the various modules in the Portal.
- **Column Icon:** From anywhere in the Portal, click on this icon and you will be returned to the Dashboard. 
- **Settings (Gear Icon):** 
  - **Change Password** (different that Reset Password; Reset is when you have no access; Change is when you want to update an existing one). Enter new information and click Update.
  - **Logout**
- **Roles**  AP 
  - A user can have multiple roles, and this is where you can see which roles you have been approved for. These roles determines what you can see and do in the portal. In this example there is only one role to choose from at this time.

- A better example is that State Staff could have local access and see what the Coordinator sees instead of us having to do screenshares for the State staff to assist with portal navigation.
- AP is Applicant and provides the highest level of access. There will be one for Fiscal Coordinator and one for Read Only.

## DASHBOARD MODULES

- **Inbox**
  - **The way** that local and state communicate
- **Reports**
  - Various reports that will be developed once the operational modules are online.
- **Help**
  - Portal navigation tips
- **Reimbursements**
  - Submission and approval of reimbursement requests
- **Annual Plans**
  - Will be structured much like the current Annual Plan
- **Inventory**
  - Inventory list of trackable items
  - Created based on items coded as “Equipment” budget category in the Annual Plan
- **Local Applications**

Contains the Local Application for each year of Perkins V as they are added

  - **Filter:** allows user to sort various ways to use the Portal modules
  - **Create Application** will be first option and will produce a screen with the following options.
    - **AY-Academic Year**
    - **Local Application ID:** Tracking reference
    - **Applicant:** College name and is restricted to the college associated with the logged in user. State Staff screens will provide access to all colleges.
    - **FICE:** College identification code for portal tracking and reports
    - **Status:** Created – Submitted – Declined – Approved
    - **Updated:** Each version is numbered and dated which allows the viewer to see historical changes
    - **Actions:** (Hover the cursor over the icon to see the name of it. Inbox/arrow: Submit; Trash can: Delete; Squares: Clone for new year

- Once “Create New Application” is clicked or an existing one is chosen, the portal will open up the Local Application navigation screen which contains the three sections: Section 134, 135 and 113.
  - Inventory list of trackable items
  - Created based on items coded as “Equipment” budget category in the Annual Plan
- When complete, remember that the Submit button is connected to the Local Application, Click the Dashboard icon; choose the appropriate Local Application and click the Submit icon.