	# Setting Up For Success
	### With
	# Plan4Learning

For the successful implementation of your new software, Plan4Learning recommends the following procedures be completed before campuses and others be given access to the software:

District Steps - to be completed by a District Power User

- ☐ **Add Users** - Add all district users and at least one Power User for each campus.   Here's how:
  1. On the small, gray Utilities Bar located on the upper right-hand side of the page after you log in, click on "Manage Account" and then "User Setup."
  2. Enter each district user's person's first name, last name and complete school district email address.
  3. For the Username, enter the person's email address again. The software will automatically use the email as the password. Instruct the user to change their password the first time they log in. (Go to "Manage Account" on the gray Utility Bar and then to "Change Password.")
  4. <u>Be sure to click the drop down box and select whether this person is a district user or select the campus name where the person is assigned. Then, select the person's role.</u>
  5. If you would like for Plan4Learning to enter your users for you, please complete the User Access Authorization Form (http://www.plan4learning.com/AccessAuthorization.doc) and send it to support@plan4learning.com.
- ☐ **Define the Funding Sources -** Add all of the funding sources that you want campuses and district users to be able to use.
  1. Confirm you are working in the correct school year by looking at the year listed at the very top of the page after you log in. If it is incorrect, go to "Change Year" located in the gray area under the black Main Menu Bar and change the year.

2. Confirm you are in the district improvement plan. Look at the very top left of the page OR look in the "Change School" box in the gray area under the black Main Menu Bar. If you are not in the district improvement plan, go to the "Change School" box and change your school to district improvement plan.
3. Go to "Goals" on the black Main Menu Bar and then click on "Fund Source Titles."
4. Click in the box labeled "Title" and begin inserting your Funding Sources. Plan4Learning recommends using TEA's three digit fund code followed by two or three words that describe the fund. However, you can set this up any way that makes sense for your district.

☐ **Enter the District Goals** - Many school districts have campuses use the district goals as their campus goals. If this applies to you:
1. Confirm you are working in the correct school year by looking at the year listed at the very top of the page after you log in. If it is incorrect, go to "Change Year" located in the gray area under the black Main Menu Bar and change the year.
2. Go to "Goals" on the black Main Menu Bar. Then, click on "Goals." In the first orange box, click on "Add Goal" to begin. (For more detailed information on entering goals, please refer to the User Guide located under Help > User Guide)

Campus Steps - to be completed by a Campus Power User.

☐ **Add Users** - Add all campus users. Here's how:
1. Confirm you are working in the correct school year by looking at the year listed at the very top of the page after you log in. If it is incorrect, go to "Change Year" located in the gray area under the black Main Menu Bar and change the year.
2. On the small, gray Utilities Bar located on the upper right-hand side of the page after you log in, click on "Manage Account" and then "User Setup."
3. Confirm you are in your campus plan before entering users. Look at the very top of the page OR look in the "Change School" box in the gray area under the black, Main Menu Bar.
4. Enter each user's person's first name, last name and complete school district email address.
5. For the Username, enter the person's email address again. The software will automatically use the email as the password. Instruct the user to change their password the first time they log in. (Go to "Manage Account" on the gray Utility Bar and then to "Change Password.")
6. Be sure to check that the drop down box contains your campus. Then, select the person's role.

7. If you would like for Plan4Learning to enter your users for you, please complete the User Access Authorization Form (http://www.plan4learning.com/AccessAuthorization.doc) and send it to support@plan4learning.com.

- **Accept the District Goals -** Many school districts have campuses use the district goals as their campus goals. If this applies to you:
    1. Confirm you are working in the correct school year by looking at the year listed at the very top of the page after you log in. If it is incorrect, go to "Change Year" located in the gray area under the black Main Menu Bar and change the year.
    2. Go to "Goals" on the black Main Menu Bar.
    3. Click on District Goal #1 in the box under "District Goals" so that it becomes highlighted. Then, click on the orange box titled "Add District Goal." Before doing so, be sure to ask a district administrator if you are supposed to copy the district's objectives into your plan. (Typically, only very small districts use this feature. Most districts do not.)
    4. Keep selecting and saving district goals until all of them appear in the Goals text box.

If you have questions about these or any other set-up steps, please don't hesitate to contact us!

Email: support@plan4learning.com

Phone: 877-331-6160