

**Institutional Head and Group  
Supervisors' Guide - Bourstad Program**

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# Chapter 1. Introduction and content of this resource

This guide presents the features of the Institutional Head's and Group Supervisor's environment.

The Bourstad Program of the Interuniversity Research Center on Organizational Analysis (CIRANO) is a financial education initiative.

This section includes the following groups:

- Private simulations
- Group Supervisors;
- Groups;
- Notification system;

The Bourstad Program is supported by numerous sponsors:

Ce guide en [format PDF](#)..

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## Chapter 2. Private simulations

The Bourstad application makes it possible to create and manage private simulations organized for students of a school enrolled in the Bourstad Program.

### Creating a private simulation

Schools enrolling in the Bourstad Program can create private simulations at any time during the school year. Here are the steps to follow.

The creation of a simulation must be carried out by the Institutional Head of Bourstad within the school.

The steps listed below assume that an Institutional Head has logged into their account and the Institutional Head profile is displayed, which is the case at login.

Figure 1. Illustration of the first 3 steps

**BOURSTAD**  
226 547.34 \$

Displayed profile  
Inst. Head ▾

Simulation  
Dashboard

Ranking  
Bourstad Challenge

Resources  
Documentation

Administration  
**1** Private simulations  
Group supervisors

**MANAGE SIMULATIONS**

**2** Select your school ▾

**3** + Add a private simulation

| Last modification | Name   | Beginning  | End        | Active | # of Groups | Actions |
|-------------------|--|------------|------------|--------|-------------|---------|
| 2018-10-02 10:53  | 25th Anniversary Simulation                  | 2018-10-01 | 2018-11-30 | 1      | 3           | ▾       |
| 2018-10-02 12:32  | AQEUS Meeting                                | 2018-10-07 | 2018-10-14 | 1      | 1           | ▾       |
| 2018-10-03 12:29  | Open House Day                               | 2018-10-05 | 2018-10-06 | 1      | 1           | ▾       |
| 2019-02-22 08:37  | Financial Education - Investment and Savings | 2019-10-07 | 2019-11-30 | 1      | 1           | ▾       |

1. Request option *Private Simulation* in the Administration group of the Institutional Head menu  
The *Manage Simulations* page is displayed.
2. Select your school from the drop-down list.

A table of the private simulations is displayed. If no private simulation was previously created, only the column headers of the table are displayed.

3. Click on the link *+Add a private simulation* which appears above the table on the right.

Figure 2. Illustration of the next steps

Adding a new simulation

The form contains the following fields and options, with numbered annotations:

- School:** CIRANO Academy
- Name of the simulation:** Fall Semester Simulation (4)
- Beginning:** 2019-09-22 (5)
- End:** 2019-12-14 (6)
- Financial performance ranking:** Yes (7)
- Portfolio management ranking:** Yes (8)
- Deadline (optional):** 2019-10-07
- Date of adjustment:** 2019-11-04 (9)
- Time to justify a transaction:** 48 hours (11)
- Brokerage fees:** 20 \$ (12)
- Active:** ☒ (13)

At the bottom, there is a "Save Changes?" prompt, a "Cancel" button, and a "Save" button.



4. **Name of the simulation.** This designation will refer to the simulation in all on-screen displays and related printouts.



**Note:**

the name of a private simulation can not include the expressions *concourses Bourstad* or *Bourstad Challenge*.

5. **Beginning.** Day of the beginning of the private simulation.
- a. The simulation starts at 0 am on the first day.
  - b. The first day of a simulation falls between the beginning (August 1st) and the end (June 30th) of the school year for which the school registration is valid.
6. **End.** Day of the end of the private simulation.
- a. The simulation ends at 0h am on the last day
  - b. The day of the end of a simulation must come after the first day of the simulation.



**Note:**

If a simulation is to end at market close, for example Friday, November 17, 2019 at 4:00 pm, indicate the following day, for example November 18, 2019, as the ending day of the simulation.

7. **Financial performance ranking.** Check yes if you want a ranking of financial performance to be produced by the Bourstad app.
- a. If yes, the participant can request the displaying of the financial performance ranking by clicking on Private Simulation of the Ranking group in the participant's menu.
  - b. The Institutional Head can display the financial performance ranking by requesting action *Performance ranking* in the Manage Simulation table for the relevant private simulation.
  - c. Group supervisors and the Institutional Head can display the performance ranking by selecting the relevant simulation after requesting the *Groups, Members, and Activation Codes* feature. You can then use the Financial Performance Ranking link at the top of the table on the left.

- d. Group supervisors and the Institutional Head may also view performance rankings on the teachers' dashboard.



**Note:**

The financial performance ranking will be displayed on the teachers' dashboard regardless of the choice made (yes or no) for the *Financial performance ranking* field of the private simulation creation form.

8. **Portfolio Management Ranking.** Check yes if you want group supervisors and the Institutional Head to be able to display a portfolio management ranking for the simulation.



**Note:**

Participants in a private simulation can not display the portfolio management ranking of their group or of all participants in a simulation

- a. The Institutional Head can display the financial performance ranking by requesting action *Management ranking* in the Manage Simulation table for the relevant private simulation.
- b. Group supervisors and the Institutional Head can display the portfolio management ranking by selecting the relevant simulation after requesting the *Groups, Members, and Activation Codes* feature. You can then use the *Portfolio Management Ranking* link at the top of the table on the left.
- c. Group supervisors and the Institutional Head may also view portfolio management rankings on the teachers' dashboard.



**Note:**

The portfolio management ranking will be displayed on the teachers' dashboard regardless of the choice made (yes or no) for the *Portfolio management ranking* field of the private simulation creation form.

9. **Deadline (optional)** Check yes if you want to set a deadline to complete these portfolio management tasks

- a. Definition of the investor-client
- b. The portfolio management strategy
- c. The learning objectives of the participant
- d. The deadline is also the ultimate moment to activate an account in a private simulation.



**Note:**

The deadline is 00:00 of the day indicated.



**Note:**

Not stipulating a deadline limits how many portfolio management measures the Bourstad application can compute.

10. **Date of adjustment** Allows you to specify an additional due date to allow the participant to modify their original portfolio management strategy once.



**Note:**

This field only appears if a deadline has been set

11. **Time to justify a transaction.** This parameter determines for how many hours after submitting a transaction, the participant can provide justifications to his transaction.
- a. The value for this parameter must be between 1 and 48
  - b. Regardless of this setting, a participant will not be able to justify a transaction after the end of a simulation.
12. **Brokerage fees.** Indicate the amount in Canadian dollars that will be charged for transactions subject to brokerage fees. There are no brokerage fees for transactions on these securities:
- a. Currencies
  - b. Exchange-traded funds of money market securities
  - c. Actively managed mutual funds



**Note:**

The amount of brokerage fees can not be changed after the start of a simulation.

13. **Active** Click on the box to activate a private simulation. When a private simulation is active:

- a. a student can use an activation code to create his or her participation account in this private simulation up until the deadline, or if there is none, until the end date of the simulation; the activation of an account can be done even before the start of the simulation.
- b. a simulation participant can perform authorized transactions or portfolio management transactions between the beginning and the end of the private simulation.
- c. a participant can consult the reports describing his operations as well as the financial performance rankings from the beginning of the simulation, even after the end of the simulation.

## Manage Simulation table

The Manage Simulations table lists the private simulations already created and allows the Institutional Head to execute 4 separate actions on each of these simulations.

Figure 3. Actions on private simulations

MANAGE SIMULATIONS

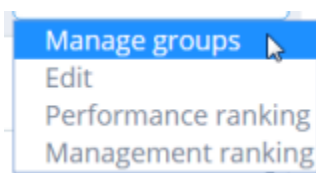
Bluemount Collegiate Institute (Montréal, QC) ▼

[+ Add a private simulation](#)

| Last modification | Name                             | Beginning  | End        | Active | # of Groups | Actions |
|-------------------|----------------------------------|------------|------------|--------|-------------|---------|
| 2017-11-15 10:58  | Investments Fall 2017 Cont Ed    | 2017-10-18 | 2017-12-13 | 1      | 1           | ▼       |
| 2017-10-19 23:51  | Introduction to Business Fall 17 | 2017-10-20 | 2017-12-20 | 1      | 1           | ▼       |
| 2018-01-24 13:30  | Investments Winter 2018          | 2018-01-24 | 2018-03-29 | 1      | 1           | ▼       |

Manage groups  
Edit  
Performance ranking  
Management ranking

## Manage Simulations table, Manage Groups action



When this action in the *Manage Simulations* table is selected, it displays the *Manage Groups* table for this simulation

Figure 4. Manage Groups table displayed from the Manage Simulations table

MANAGE GROUPS

Bluemount Collegiate Institute (Montréal, QC)

Investments Fall 2017 Cont Ed

+ Add a group

Portfolio management ranking

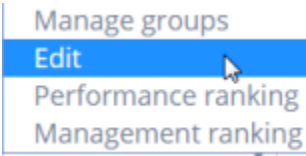
Financial performance ranking Investments Fall 2017 Cont Ed

| ID  | Name                   | Number of codes | Actions |
|-----|------------------------|-----------------|---------|
| 218 | Bluemount CI - Group 1 | 28 / 61         |         |

**Related information**

[Manage Groups table \(on page 27\)](#)

*Manage Simulations table, Edit action*



When this action in table *Manage Simulations* is selected, a form to modify the editable parameters of a private simulation is displayed.

Figure 5. Form allowing to modify a private simulation

**School**  
Bluemount Collegiate Institute

**Name of the simulation**  
Investments Fall 2017 Cont Ed

**Beginning** **End**  
2017-10-18 2017-12-13

**Financial performance ranking** ?  
☒ Yes ☐ No

**Portfolio management ranking** ?  
☒ Yes ☐ No

**Deadline (optional)** ? **Date of adjustment** ?  
2017-11-16 2017-11-29

**Time to justify a transaction** ? **Brokerage fees**  
48 hours 10.0000 \$

☒ Active

Save Changes? Cancel Save

When a private simulation is started, the following parameters can not be changed:

- The start date of the simulation.
- The amount of brokerage fees.

### *Manage simulations table, Performance Ranking action*

|                            |
|----------------------------|
| Manage groups              |
| Edit                       |
| <b>Performance ranking</b> |
| Management ranking         |

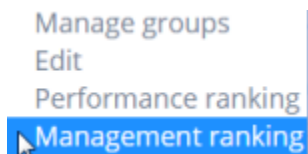
When this action in table *Manage Simulations* is selected, it displays a table that shows the financial performance ranking of all participants in a private simulation.

Figure 6. Portfolio management ranking of all participants of the private simulation

### Financial performance ranking - Bluemount Collegiate Institute (Investments Fall 2017 Cont Ed)

|   | Name             | Portfolio value |
|---|------------------|-----------------|
| 1 | Alexander Watson | 211 519.18 \$   |
| 2 | Hamdi Arbadji    | 210 033.31 \$   |
| 3 | Stephane Landry  | 209 682.21 \$   |
| 4 | Danielle Robin   | 207 547.41 \$   |
| 5 | Paul Bourget     | 206 504.07 \$   |
| 6 | Isabel Crawley   | 206 477.14 \$   |
| 7 | Pierre Travis    | 205 644.57 \$   |
| 8 | Suzanne Côté     | 205 484.32 \$   |
| 9 | Pierre Lowry     | 205 141.80 \$   |

### *Manage Simulations* table, *Management Ranking* action



When this action in table *Manage Simulations* is selected, it displays a table that shows the portfolio management ranking of all participants in a private simulation.

Figure 7. Display of the portfolio management ranking of all participants of the private simulation

### Portfolio management ranking - Investments Fall 2017 Cont Ed

Bluemount Collegiate Institute (Montréal, QC)

|   | Name (City)         | School (City)                                 | Mark  |
|---|---------------------|---|-------|
| 1 | Julie Andrews ()    | Bluemount Collegiate Institute (Montréal, QC) | 66.74 |
| 2 | Danielle Robin ()   | Bluemount Collegiate Institute (Montréal, QC) | 66.45 |
| 3 | Stefanie Lambert () | Bluemount Collegiate Institute (Montréal, QC) | 62.07 |
| 4 | Ben Larson ()       | Bluemount Collegiate Institute (Montréal, QC) | 57.03 |

When this command is requested during a private simulation, the score is calculated based on the 5 formative evaluation measures.

When this command is requested after the end of a private simulation, the score is calculated based on the 14 summative evaluation measures.



**Note:**

In order for the summative evaluation measures to be calculated, the Institutional Head must make an express request to the person responsible for relations with institutions participating in the Bourstad program ([bourstad@cirano.qc.ca](mailto:bourstad@cirano.qc.ca))

---

**Related information**

[https://www.iclf.ca/WH/linked\\_doc/BT\\_Eval\\_Gestion\\_EN.pdf](https://www.iclf.ca/WH/linked_doc/BT_Eval_Gestion_EN.pdf)



## Chapter 3. Group supervisors

The Institutional Head of the Bourstad program in a school can appoint one or more group supervisors for the group (s) participating in the Bourstad Challenge or a private simulation.

### Related information

[Groups \(on page 24\)](#)

## Appoint and assign a group supervisor

Schools that join the Bourstad Program can create different groups in a private simulation and in the Bourstad Challenge. For each group, one or more group supervisors can be designated. Here are the steps to assign a group supervisor and assign responsibility for one or more groups.

The creation of a simulation must be carried out by the Institutional Head of Bourstad within the school.

The steps listed below assume that an Institutional Head has logged into their account and the Institutional Head profile is displayed, which is the case at login.

Figure 8. Illustration of the first 3 steps

**BOURSTAD**  
206 798.96 \$

Displayed profile  
Inst. Head ▾

Simulation  
Dashboard

Ranking  
Bourstad Challenge

Resources  
Documentation

Administration  
Private simulations  
**1** Group supervisors  
Groups, members and activation codes

MANAGING GROUP SUPERVISORS

Bluemount Collegiate Institute (Montréal, QC) **2**

**3** + Add a group supervisor

| First name | Name    | Function | email                       | Home phone   | Cell phone | Groups   |
|------------|---------|----------|-----------------------------|--------------|------------|--|
| Jean       | Forest  | Teacher  | test190225b@iclf.ca         |              |            | 2018 Bourstad Challenge-Bluemount CI, Group 1        |
| Paulette   | Leblanc | Teacher  | pauletteleblanc@hotmail.com | 579-631-1128 |            | Investments Fall 2017 Cont Ed-Bluemount CI - Group 1 |

1. Request option *Group supervisors* in the Administration group of the Institutional Head menu  
The *Manage Group Supervisors* webpage is displayed.

2. Select your school from the drop-down list.

A table of previously named group supervisors and their assignments is displayed. If no group supervisor has been designated yet, only the table column headings are displayed.

3. Click on the link *+Add a group supervisor* which appears above the table on the right.

The New Group Supervisor form is displayed.

Figure 9. Illustration of the next 2 steps

New Group Supervisor

School  
Bluemount Collegiate Institute

email  
4 ilatimer@iclf.ca

5 Continue

4. Enter the email address of the person you want to designate as a group supervisor



**Note:**

This is the email address that serves (or will be used) as the user name in the Bourstad app for the group supervisor to be named.

5. Click next.

The next steps describe the process followed when the new group supervisor's email address is already registered in the Bourstad application.

Figure 10. Steps 6 to 8 when the new group supervisor has an account in the Bourstad app

**New Group Supervisor**

**School**  
 Bluemount Collegiate Institute

**email**  
 ilatimer@iclf.ca

**Function**  
 Student Life Animator **6**

**List of groups**

- ☐ 2018 Bourstad Challenge - Bluemount CI, Group 1
- ☐ 2018 Bourstad Challenge - Investments Cont Ed Winter 2018
- ☐ 2018 Bourstad Challenge - Student Services Finance Group **7**
- ☐ Investments Fall 2017 Cont Ed - Bluemount CI - Group 1
- ☐ Introduction to Business Fall 17 - Bluemount CI - Group 1
- ☐ Investments Winter 2018 - Bluemount CI - Group 1
- ☐ Test du 27 mai - Bluemount CI, Group 1
- ☒ Spring Break Simulation - Bluemount CI, Group 1

Save Changes? Cancel Save **8**

6. Indicate the job title of this person at your school.

7. Check all the groups for which the new group supervisor will be responsible.



**Note:**

These choices can be changed later by using the Groups, members and activation codes feature.

8. Click Save.

9. The table of group managers is displayed and the assignment of the new group supervisor (Ingrid Latimer) appears there.

Figure 11. New supervisor added to the table of group supervisors

| MANAGING GROUP SUPERVISORS                      |         |                       |                             |              |            |  |
|---|---------|-----------------------|-----------------------------|--------------|------------|--|
| Bluemount Collegiate Institute (Montréal, QC) ▼ |         |                       |                             |              |            |  |
| <a href="#">+ Add a group supervisor</a>        |         |                       |                             |              |            |  |
| First name                                      | Name    | Function              | email                       | Home phone   | Cell phone | Groups   |
| Jean  | Forest  | Teacher               | test190225b@iclf.ca         |              |            | 2018 Bourstad Challenge-Bluemount CI, Group 1        |
| Ingrid  | Latimer | Student Life Animator | ilatimer@iclf.ca            |              |            | Spring Break Simulation-Bluemount CI, Group 1        |
| Paulette  | Leblanc | Teacher               | pauletteleblanc@hotmail.com | 579-631-1128 |            | Investments Fall 2017 Cont Ed-Bluemount CI - Group 1 |

The next steps describe the process when the designated group supervisor does not already have an account in the Bourstad application.

Figure 12. Steps 10 to 13 when the new group supervisor does not have an account in the Bourstad app

New Group Supervisor

School  
 Bluemount Collegiate Institute

email  
 drussell@iclf.ca

Title  **10**

First name  
 **11**

Last name  
 **12**

**13**

Save Changes?

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10. Select the appropriate title.
11. Enter the first name of the new supervisor.
12. Enter the last name of the new supervisor.
13. Click Invite to send an email invitation to the new supervisor.

Figure 13. Email sent by the app to the person invited to become a group supervisor

**Dave Russell**

---

**From:** bourstad@cirano.qc.ca  
**Date:** September 6 2019 20:20  
**Sent to:** drussell@iclf.ca  
**Subject:** Invitation to act as group supervisor in a Bourstad simulation - Bluemount Collegiate Institute

Mr. Dave Russell,

The Institutional Head of the Bourstad Program 2017-2018 in a participating institution invites you to act as group supervisor in a Bourstad simulation.

Institution : Bluemount Collegiate Institute  
Institutional Head : M. Pierre Berton

To perform this function, you must first create a participant account in the Bourstad Anytime simulation. To do this,

- 1) Visit the website <http://www.bourstad.ca>
- 2) Click the Register button
- 3) Click the Participant button
- 4) Choose the Bourstad Anytime simulation

When you have created this account, M. Pierre Berton will be notified and can proceed to your appointment as group supervisor. Once you have been designated as a group supervisor, your Bourstad platform access account will give you access to the Manager Dashboard and the Group Management feature.

For any information or clarification, contact the Bourstad Operations Center.

Bourstad Operations Center  
CIRANO  
[bourstad@cirano.qc.ca](mailto:bourstad@cirano.qc.ca)  
514 985-4000, ext. 3006

14. When the invited person creates an account in the Bourstad application, the Institutional Head receives an e-mail notice, which then makes it possible to appoint the supervisor and assign him to different groups of participants.

Figure 14. Email sent by the app to the Institutional Head when the invited group supervisor created their account

**Pierre Berton**

---

**From:** bourstad@cirano.qc.ca  
**Date:** September 6 2019 20:36  
**To:** pberton@iclf.ca  
**Subject:** drussell@iclf.ca (Dave Russell) is a user of the Bourstad application

M. Pierre Berton  
Institutional Head  
Bluemount Collegiate Institute

Hello M. Berton,

The purpose of this communication is to inform you that M. Dave Russell responded to your invitation and created a participation account in the Bourstad app with the user name [drussell@iclf.ca](mailto:drussell@iclf.ca).

You can now use the Group supervisors feature to designate M. Dave Russell a Bourstad Group Supervisor within your institution; you will also need to assign this group supervisor to one or more groups of participants within your institution.

Please receive our best regards,

Bourstad Operations Center  
CIRANO  
514 985-4000, ext 3006

# Chapter 4. Groups

Students participate in the Bourstad Challenge and private simulations within groups within their school. Institutional heads can create additional groups and manage existing groups. Group supervisors can manage the group or groups they are responsible for.

## Create a group in a private simulation or in the Bourstad Challenge

Schools that join the Bourstad Program may create one or more groups in the Bourstad Challenge and in the private simulations they have created. This section presents the steps to follow.

The creation of a group must be carried out by the Institutional Head of Bourstad within the school.

The steps listed below assume that an Institutional Head has logged into their account and the Institutional Head profile is displayed, which is the case at login.

The creation of groups for the same simulation in a school makes it possible to obtain, for example on the teachers' dashboard, reports for separate groups of a course or for students with different study profiles (eg students of a specialization course Vs students of a complementary course).



**Note:**

When a school is registered for the Bourstad program, a group of this school is automatically created in the Bourstad Challenge.



**Note:**

When creating a private simulation for this school, a group is automatically created for this private simulation.



Figure 15. Illustration of the first 3 steps

**BOURSTAD**  
226 547.34 \$

Displayed profile  
Inst. Head ▾

Simulation  
Dashboard

Ranking  
Bourstad Challenge

Resources  
Documentation

Administration  
Private simulations  
Group supervisors  
**1** Groups, members and activation codes

**MANAGE GROUPS**

CIRANO Academy (Montréal, QC)

2018 Bourstad Challenge **2**

**3** + Add a group

Portfolio management ranking

| ID    | Name                     | Number of codes | Actions              |
|-------|--------------------------|-----------------|----------------------|
| 285   | CIRANO Academy , Group 1 | 47 / 53         | <input type="text"/> |
| 424   | CIRANO Academy , Group 2 | 0 / 0           | <input type="text"/> |
| 10435 | CIRANO Academy , Group 3 | 0 / 0           | <input type="text"/> |

1. Request the menu option *Groups, members and activation codes* in the Administration group of the Institutional Head menu  
The *Manage Groups* page is displayed.
2. Select a simulation, the Bourstad Challenge or a private simulation, from the drop-down list.  
A table of groups that already exist for this simulation is displayed.
3. Click on the link *+Add a group* which appears above the table on the right.  
The window *Adding a new group* is displayed.

Figure 16. Illustration of the next 3 steps

Adding a new group

The screenshot shows a web form titled "Adding a new group". It contains several input fields and a list of checkboxes. Step 4 points to the "Name of the group" field, which contains "CIRANO Academy, Group 4". Step 5 points to the "Group supervisors" section, specifically to the checkbox for "Claude Rolland", which is checked. Step 6 points to the "Save" button at the bottom right. The form also includes fields for "School" (CIRANO Academy) and "Name of the simulation" (2018 Bourstad Challenge). At the bottom, there is a "Save Changes?" label, a "Cancel" button, and a "Save" button.

School  
CIRANO Academy

Name of the simulation  
2018 Bourstad Challenge

Name of the group  
CIRANO Academy, Group 4 **4**

Group supervisors

- ☐ Alex Martin
- ☐ Anne Martin
- ☒ Claude Rolland **5**
- ☐ Dominic Ryan
- ☐ Jean Forest
- ☐ Lysandre Tremblay

**6**

Save Changes? Cancel Save

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4. Specify the name to be assigned to the new group.



**Note:**

The name of a group can be changed using the Edit action in the Manage Groups table.

5. If applicable, assign one or more group supervisors for the new group.



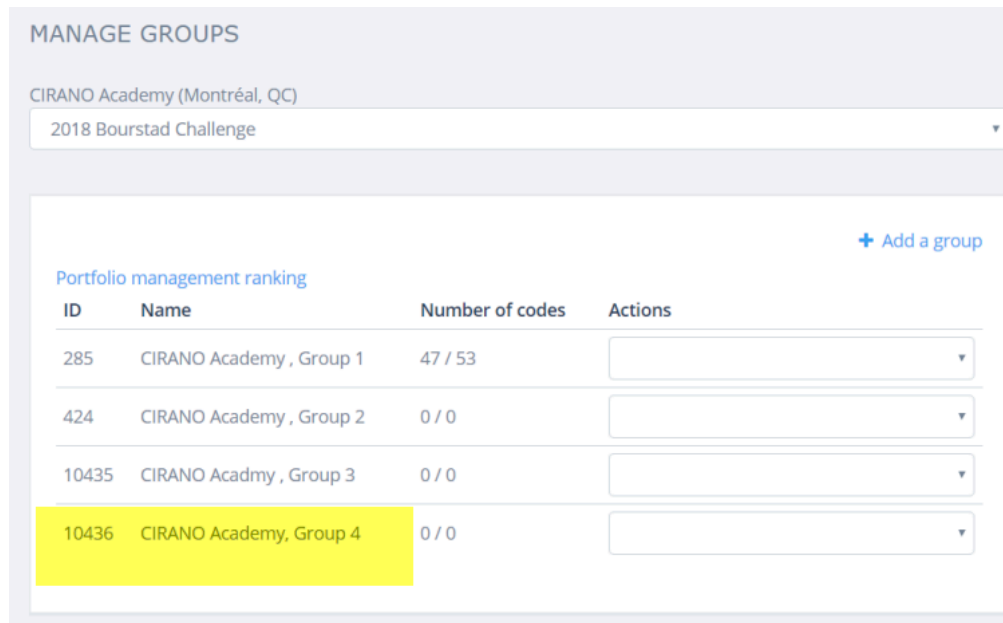
**Note:**

In order to assign group supervisors, one or more group supervisors must have been designated using the *Group supervisors* function.

6. Save the information for the new group to be created.

It can then be seen by reselecting the simulation from the drop-down list that a new group has been added.

Figure 17. New group added



**MANAGE GROUPS**

CIRANO Academy (Montréal, QC)

2018 Bourstad Challenge ▼

[+ Add a group](#)

*Portfolio management ranking*

| ID    | Name                     | Number of codes | Actions |
|-------|--------------------------|-----------------|---------|
| 285   | CIRANO Academy , Group 1 | 47 / 53         | ▼       |
| 424   | CIRANO Academy , Group 2 | 0 / 0           | ▼       |
| 10435 | CIRANO Acadmy , Group 3  | 0 / 0           | ▼       |
| 10436 | CIRANO Academy, Group 4  | 0 / 0           | ▼       |

## Manage Groups table

The Manage Groups table gives the list of groups for the Bourstad Challenge or for a private simulation and allows for each group to perform 5 separate actions.

Figure 18. Actions on groups

**MANAGE GROUPS**

Bluemount Collegiate Institute (Montréal, QC)

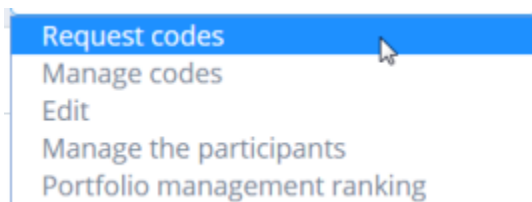
2018 Bourstad Challenge

[+ Add a group](#)

Portfolio management ranking

| ID  | Name                            | Number of codes | Actions   |
|-----|---------------------------------|-----------------|---|
| 217 | Bluemount CI, Group 1           | 8 / 80          | <div> Request codes<br/> Manage codes<br/> Edit<br/> Manage the participants<br/> Portfolio management ranking </div> |
| 333 | Investments Cont Ed Winter 2018 | 2 / 20          |   |
| 359 | Student Services Finance Group  | 0 / 5           |   |

### *Manage groups table, Request codes action*



When this action in the Manage Groups table is selected, it displays the activation codes order form.

Figure 19. Activation Codes Order Form

ACTIVATION CODES

Order for activation codes

Bluemount Collegiate Institute (Montréal, QC) - 2018 Bourstad Challenge - Bluemount Collegiate Institute, Group 1

**1 Type of participation**

☐ Individual participation

☐ Tandem participation (team of 2 students)

**2 Mode of code transmission**

☐ Codes to be sent immediately by email to the recipients. Maximum: 60 codes per transmission.

☐ Codes to be transmitted later to the recipients

This section displays only for the Bourstad Challenge

If the simulation concerned is the Bourstad Challenge, the form also includes a section entitled "Type of participation" to choose between individual accounts and tandem accounts.

There are two choices as to how the codes are to be transmitted.

### 1. Immediate transmission of activation codes by email to the students

This choice allows up to 60 activation codes to be sent to recipients.

Clicking this option will display instructions on how to enter email addresses in an input box.

Figure 20. Ordering codes for immediate email transmission to students

**Mode of code transmission**

☒ Codes to be sent immediately by email to the recipients. Maximum: 60 codes per transmission.

Paste email addresses on separate lines, example :

abc@gmail.com

def@ymail.com

...

For a tandem, separate the members of the tandem by ";" and the tandems on separate lines, for example:

abc@gmail.com; xyz@gmail.com

def@ymail.com

...

A code can be transmitted to only one of the 2 members of the tandem.

Order

☐ Codes to be transmitted later to the recipients

By clicking on the Order button, an email communication will be sent to each recipient with the activation code and instructions to proceed. This communication is identical to the one you can send with the *Send by Email* action in the [Manage Activation Codes \(on page 39\)](#) table.

## 2. Ordering activation codes for later transmission to students

Choosing this option will display an input box to indicate the number of activation codes to be ordered.

Figure 21. Order code for later transmission

### Mode of code transmission

☐ Codes to be sent immediately by email to the recipients. Maximum: 60 codes per transmission.

☒ Codes to be transmitted later to the recipients

Quantity

Order

These codes will be added to the Manage Activation Codes table.

Each code can be printed and/or emailed individually.

The codes will be displayed immediately in a pdf file, one code per page, if your browser is properly configured.

All codes ordered are added to the Manage Activation Codes table.

When an order for further transmission is placed, the ordered codes are displayed in a pdf file.

**Note:**

for a pdf document to appear on the screen, it is necessary to use [a browser that is correctly set to display popup windows](#).

Figure 22. Display of the ordered codes in a pdf file within a popup window

Bluemount Collegiate Institute  
2018 Bourstad Challenge  
Bluemount CI, Group 1

**ACTIVATION CODE**

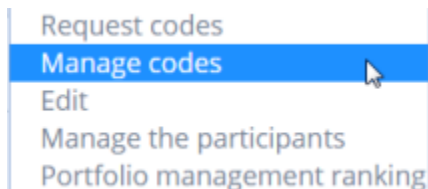
**0Q23-170N-0081**

Ordered by: Pierre Massicotte  
Date: 2019-09-04  
Registration for individual participation.  
This registration must be paid online by the participant at the time of activation.

**Instructions:**

- 1) Go to <http://www.bourstad.ca>
- 2) Click the Register button
- 3) Click the Participant button
- 4) Click on the Bourstad Challenge button
- 5) Select the CEGEPs/community colleges and secondary schools option
- 6) Enter the activation code and continue the steps of the creation of the participation account

## Manage Groups table, Manage Codes action



When this action in the Manage Groups table is selected, it displays the Manage Activation Codes table for that group in this simulation.

Figure 23. Manage Activation Codes table

**GÉRER LES CODES D'ACTIVATION**

Collège de Montbleu (Montréal, QC) - Concours Bourstad 2018 - Collège de Montbleu, Groupe 1

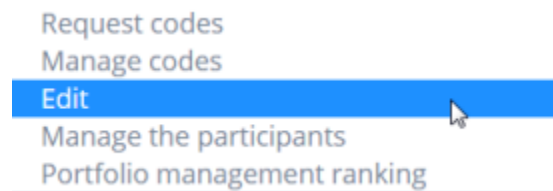
Date  Commandé par  Etat  [Filtrer](#)

[+ Demander des codes](#)

| ID        | Date création | Commandé par | Tandem | Participant 1         | Activé le  | Participant 2 | Activé le                      |
|-----------|---------------|--------------|--------|-----------------------|------------|---------------|--------------------------------|
| 0217-0001 | 2018-01-04    | Jean Forest  | 0      | Jean-Philippe Bourget | 2018-01-04 |               | <input type="text" value="v"/> |
| 0217-0002 | 2018-01-17    | Jean Forest  | 0      |                       |            |               | <input type="text" value="v"/> |
| 0217-0003 | 2018-01-25    | Jean Forest  | 0      |                       |            |               | <input type="text" value="v"/> |
| 0217-0004 | 2018-01-25    | Jean Forest  | 0      |                       |            |               | <input type="text" value="v"/> |
| 0217-0005 | 2018-02-05    | Jean Forest  | 0      | Jean-Claude Séguin    | 2018-02-05 |               | <input type="text" value="v"/> |

**Related information**

[Manage activation codes table \(on page 37\)](#)

**Manage Groups table, Edit action**

When this action in the Manage Groups table is selected, it displays the Editing a Group form.



Figure 24. Group modification form

**School**

Bluemount Collegiate Institute

**Name of the simulation**

2018 Bourstad Challenge

**Name of the group**

Bluemount CI, Group 1

**Group supervisors**

- ☒ Alex Fairchild
- ☒ Jean Forest
- ☐ Paulette Leblanc
- ☐ Pierre Massicotte

Save Changes? Cancel Save

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The following information can be changed:

- The name of the group
- Assignment of group supervisors: it is possible to grant or withdraw the assignment of responsibility for this group to the group supervisors designated for the school.

#### Related information

[Appoint and assign a group supervisor \(on page 17\)](#)

#### Manage groups table, Manage Participants action

- Request codes
- Manage codes
- Edit
- Manage the participants**
- Portfolio management ranking

When this action in the *Manage Groups* table is selected, it displays the Managing Members of a Group table for that group in this simulation.

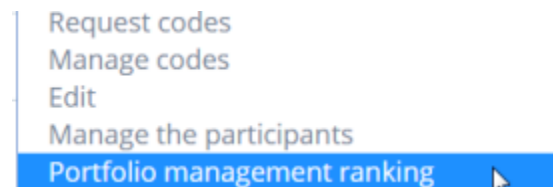
Figure 25. Managing Members of a Group table

| MANAGING MEMBERS OF A GROUP   |                 |        |               |                 |
|---|-----------------|--------|---------------|-----------------|
| Bluemount Collegiate Institute (Montréal, QC) - 2018 Bourstad Challenge - Bluemount CI, Group 1 |                 |        |               |                 |
| Participant 1   | Activation date | Tandem | Participant 2 | Activation date |
| Gael Morisson   | 2018-02-22      | 0      |               |                 |
| Sarah Koho  | 2018-02-20      | 0      |               |                 |
| Laurence Gurlekian  | 2018-02-21      | 0      |               |                 |

#### Related information

[Managing Members of a Group table \(on page 41\)](#)

### *Manage Groups* table , *Portfolio Management Ranking* action



When this action in the *Manage Groups* table is selected, it displays the portfolio management ranking for that group in this simulation.

Figure 26. Portfolio management ranking for the selected group of participants of the Bourstad Challenge or a private simulation

| Portfolio management ranking - 2018 Bourstad Challenge |   |       |
|--|---|-------|
| Bluemount Collegiate Institute (Montréal, QC)          |   |       |
| Name (City)  | School (City)                                 | Mark  |
| 1 Emmanuel Saulnier (Montréal)                         | Bluemount Collegiate Institute (Montréal, QC) | 61.72 |
| 2 Alex Désilets (Montréal)                             | Bluemount Collegiate Institute (Montréal, QC) | 44.33 |
| 3 Laurence Gurlekian (Laval)                           | Bluemount Collegiate Institute (Montréal, QC) | 42.50 |
| 4 Francis Cooper (Montréal)                            | Bluemount Collegiate Institute (Montréal, QC) | 40.39 |

When this command is requested during a simulation, whether the Bourstad Challenge or a private simulation, the score is calculated based on the 5 formative evaluation measures.

When this command is requested after the end of a simulation, the score is calculated based on the 14 summative evaluation measures.



**Note:**

For a private simulation, In order for the summative evaluation measures to be calculated, the Institutional Head must make an express request to the person responsible for relations with institutions participating in the Bourstad Program ([bourstad@cirano.qc.ca](mailto:bourstad@cirano.qc.ca))

Clicking a participant's name in the portfolio management ranking displays the participant's detailed report in a new tab.

Figure 27. Detailed report of a group's participant

Summative Assessment

Simulation

Participant

Username

Number of eligible transactions

Grade assigned (Sommativ)

2018 Bourstad Challenge

Emmanuel Saulnier

emmanuel.saulnier@hotmail.com

20

58.92 %

Marks

Portfolio Management Assessment

Criteria

Weighting

Score

Consistency of investor profile and risk sensitivity

8 %

40.00 %

Coherence between sector weights in the strategy in effect on 2018-12-25 and the investor profile

5 %

92.58 %

**Related information**

[https://www.iclf.ca/WH/linked\\_doc/BT\\_Eval\\_Gestion\\_EN.pdf](https://www.iclf.ca/WH/linked_doc/BT_Eval_Gestion_EN.pdf)

## Manage Groups table, rankings for the entire simulation

The Manage Groups table allows you to view rankings for all groups in a simulation.

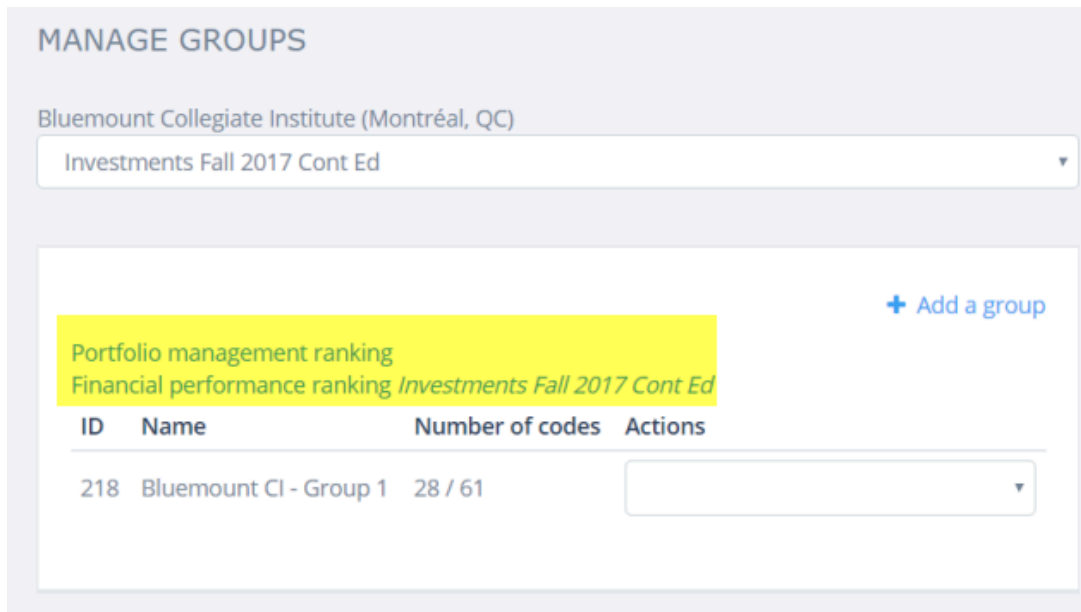
If the simulation is the Bourstad Challenge, you will see in the top left of the table a link to consult the portfolio management ranking of all the participants of the school at this annual competition.

Figure 28. Link to view the portfolio management ranking of all Bourstad Challenge participants in the school

| MANAGE GROUPS                                 |                                 |                 |
|---|---------------------------------|-----------------|
| Bluemount Collegiate Institute (Montréal, QC) |                                 |                 |
| 2018 Bourstad Challenge                       |                                 |                 |
| Portfolio management ranking                  |                                 |                 |
| ID  | Name                            | Number of codes |
| 217   | Bluemount CI, Group 1           | 8 / 90          |
| 333   | Investments Cont Ed Winter 2018 | 2 / 20          |
| 359   | Student Services Finance Group  | 0 / 5           |

If the simulation is a private simulation, you will find links in the top left of the table to consult the portfolio management ranking and the financial performance ranking of all the participants in this simulation.

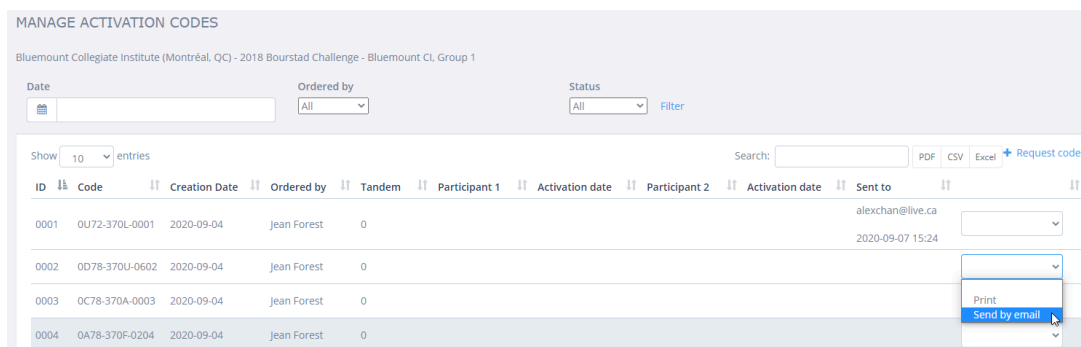
Figure 29. Links to view the portfolio management ranking and financial performance ranking of all participants in a private simulation



## Manage activation codes table

The *Manage Activation Codes* table provides the list of activation codes for a Bourstad Challenge or a private simulation group and allows to execute an action for each code.

Figure 30. Action of the Manage Activation Codes table



The *Manage Activation Codes* table can be filtered according to one or more criteria.

- The order date of the codes
- Who ordered the code
- The activation state of the code (activated or not activated)

The contents of the table can be downloaded, by clicking on the appropriate button above the table in different formats:

- PDF, a file that can be opened with an Adobe Acrobat, Adobe Reader or browsers with a built-in PDF file reader, for example Chrome.
- CSV, a file where data is separated by commas in rows that match the rows of the table.
- Excel, an .xlsx file that can be opened with Microsoft Excel or Google Sheets.

The columns of the *Manage Activation Codes* table are:

- ID. A sequential number according to the order in which the codes were created for the simulation group to which the table relates.
- Code. The activation code that a participant uses to create an account in this group for this simulation.
- Order date. Date when the activation code was ordered.
- Ordered by. The name of the Institutional Head or Group Supervisor who ordered the activation code.
- Tandem. Takes a value of 1 for a tandem account and 0 for an individual account.

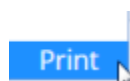


**Note:**

tandem accounts may only exist for the Bourstad Challenge.

- Participant 1. The first student who created the account using an activation code. If the account is not a tandem account, it is the only account holder.
- Activation Date. Date of activation of the account by Participant 1.
- Participant 2. Name of the second student who activated the account, for a tandem account
- Activation Date. Date when Participant 2 joined the tandem.
- Sent to. Recipient (s) of an email containing the activation code and instructions for using it; date of this email.
- Untitled column. Action that can be performed on each code
  - Print. The code is displayed as a web page in a new tab of the browser.
  - Send by email. Displays an input form to enter the recipient(s) email address(es).

*Manage Activation Codes* table, *Print* action



When this action in the Manage Codes table is selected, it displays the activation code in a new browser tab.



**Note:**

This feature allows you to reprint a code after the moment it had been ordered. When [the browser is correctly set for printing popup windows](#), all the codes of an order are displayed in a pdf document at the time of the order, which is the most convenient way to save or print the codes of an activation codes order.

Figure 31. Activation code in a web page

Bluemount Collegiate Institute  
2018 Bourstad Challenge  
Bluemount CI, Group 1



**ACTIVATION CODE**

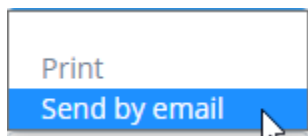
**0X21-170W-0101**

Ordered by: Jean Forest  
Date: 2018-01-04  
Registration for individual participation.  
This registration must be paid online by the participant at the time of activation.

Instructions:

- 1) Go to <http://www.bourstad.ca>
- 2) Click the Register button
- 3) Click the Participant button
- 4) Click on the Bourstad Challenge button
- 5) Select the CEGEPs/community colleges and secondary schools option
- 6) Enter the activation code and continue the steps of the creation of the participation account

## Manage Activation Codes table, Send by Email action



When this action from the *Manage Activation Codes* table is invoked, it displays a window that allows you to enter an email address; a message will be sent by email to this recipient containing the activation code and instructions for using it.

Figure 32. Send a code by email input window

Send a code by email

The activation code will be transmitted by bourstad@cirano.qc.ca to this recipient

alexchan@live.ca

Close Send

When the code is transmitted, the *Manage Activation Codes* table is displayed again and then indicates in the *Sent To* column information on the transmission that has just been made.

Figure 33. Table Manage Activation Codes after sending an activation code by email

MANAGE ACTIVATION CODES

Bluemount Collegiate Institute (Montréal, QC) - 2018 Bourstad Challenge - Bluemount CI, Group 1

Date

Ordered by

All

Status

All

Filter

+ Request codes

| ID        | Creation Date | Ordered by  | Tandem | Participant 1 | Activation date | Participant 2 | Activation date | Sent to                              |
|-----------|---------------|-------------|--------|---------------|-----------------|---------------|-----------------|--------------------------------------|
| 0737-0001 | 2020-09-04    | Jean Forest | 0      |               |                 |               |                 | alexchan@live.ca<br>2020-09-04 16:47 |

Here is the text of the email sent to the recipient for an activation code for the *Bourstad Challenge*.



Figure 34. Text of the email sent to the recipient

Here's an activation code for a Bourstad stock market simulation :

Simulation Name : 2018 Bourstad Challenge

Activation Code : 0U72-370L-0001

Participation Mode = Individuel

Sent by : Jean Forest

Here's the steps to follow to activate your participation account :

1. Visit Bourstad website : [www.bourstad.ca](http://www.bourstad.ca)
2. Click on the REGISTER button
3. Click on the PARTICIPANT button
4. Click on the BOURSTAD CHALLENGE button
5. Tick the CEGEPS/COMMUNITY COLLEGES AND SECONDARY SCHOOLS radio button, enter the activation code in the input zone, then click on the CONTINUE button. The registration form for the 2018 Bourstad Challenge will display. You must fill and submit this form.

For any additional information, contact the Bourstad operational center; you'll find contact details on the home page of the website.

Enjoy your stock market simulation,

BOURSTAD Operational Center  
CIRANO

Here are some additional clarifications.

- The activation code can be activated by a username different from the email recipient of the message
- If it is a tandem account, the window allows you to enter 2 email addresses, the 2nd being optional.
- An activation code can be sent several times to different recipients, but only one one participation account can be activated by this activation code.

## Managing Members of a Group table

The *Managing Members of a Group* table displays the list of members of the group who activated a code for an account in the simulation, either the Bourstad Challenge or a private simulation.

Figure 35. Managing Members of a Group table

| MANAGING MEMBERS OF A GROUP   |                 |        |               |                          |
|---|-----------------|--------|---------------|--------------------------|
| Bluemount Collegiate Institute (Montréal, QC) - 2018 Bourstad Challenge - Bluemount CI, Group 1 |                 |        |               |                          |
| Participant 1   | Activation date | Tandem | Participant 2 | Activation date          |
| Gael Morisson   | 2018-02-22      | 0      |               |                          |
| Sarah Koho  | 2018-02-20      | 0      |               |                          |
|   |                 |        |               | View the detailed report |

The columns in this table are:

- Participant 1. The first student who created the account using an activation code. If the account is not a tandem account, it is the only account holder
- Activation Date. Date of activation of the account by Participant 1.
- Tandem. Takes a value of 1 for a tandem account and 0 for an individual account

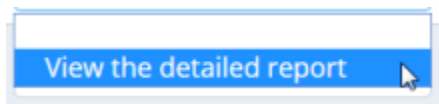


**Note:**

tandem accounts may only exist for the Bourstad Challenge.

- Participant 2. Name of the second student who activated the account, for a tandem account
- Activation Date. Date when Participant 2 joined a tandem account.
- Untitled column Action that can be performed on each participant: view to the detailed report.

### *Managing Members of a Group table, View the detailed report action*



When this action in the *Managing Members of a Group* table is selected, the participant's detailed report in this simulation is displayed in a new tab.

Figure 36. Detailed report of a group's participant

Summative Assessment

|                                 |                               |
|---------------------------------|-------------------------------|
| Simulation                      | 2018 Bourstad Challenge       |
| Participant                     | Emmanuel Saulnier             |
| Username                        | emmanuel.saulnier@hotmail.com |
| Number of eligible transactions | 20                            |
| Grade assigned (Sommative)      | 58.92 %                       |

Marks

Portfolio Management Assessment

| Criteria  | Weighting | Score   |
|---|-----------|---------|
| Consistency of investor profile and risk sensitivity  | 8 %       | 40.00 % |
| Coherence between sector weights in the strategy in effect on 2018-12-25 and the investor profile | 5 %       | 92.58 % |

A pdf version of the report can be obtained by clicking on the printer icon in the upper right corner of the web page.

# Chapter 5. The notification system

The Bourstad platform offers institutional heads and group supervisors a notification system that allows them to communicate guidelines and instructions to simulation participants.

## Notifications that can be received and issued by school officials

Who can school officials send notifications to? Who can they get it from?

### Notifications received or issued by the institutional head

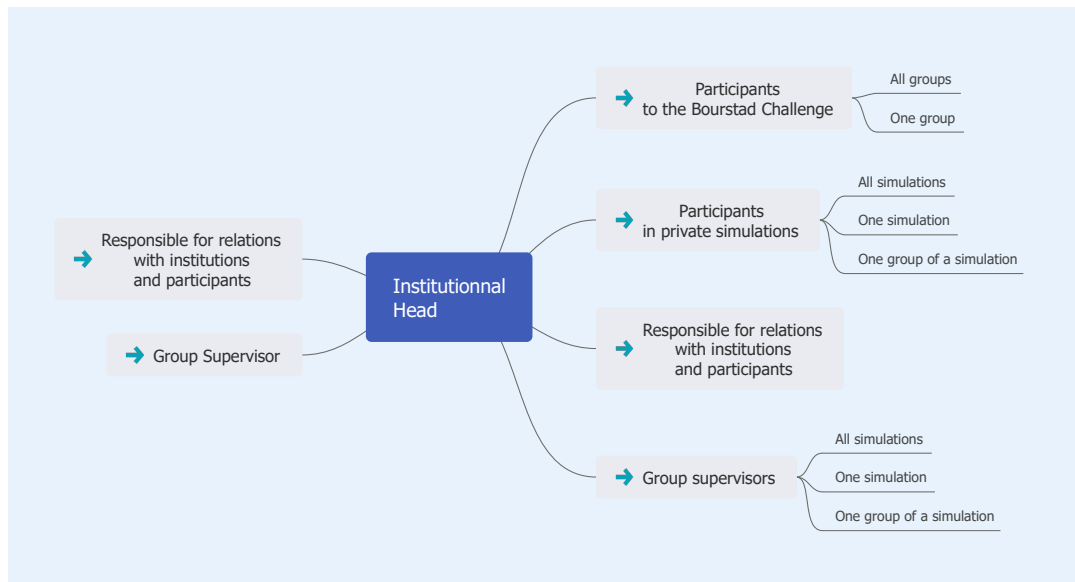
The institutional head may issue notifications to:

- The participants of the Bourstad Challenge
  - of all the groups in his school
  - of a group from his school
- Participants in the private simulations of his school
  - of all the private simulations of his school
  - of a private simulation of his school
  - of a group in a private simulation of his school
- the person responsible for relations with institutions and participants
- Group supervisors
  - of all the simulations in his school
  - of a private simulation of his school
  - of a group from a private simulation of his school

The institutional head may receive notifications

- the person responsible for relations with institutions and participants
- a group supervisor from their school

Figure 37. Notifications that can be issued or received by the institutional head



## Notifications received or issued by the group supervisor

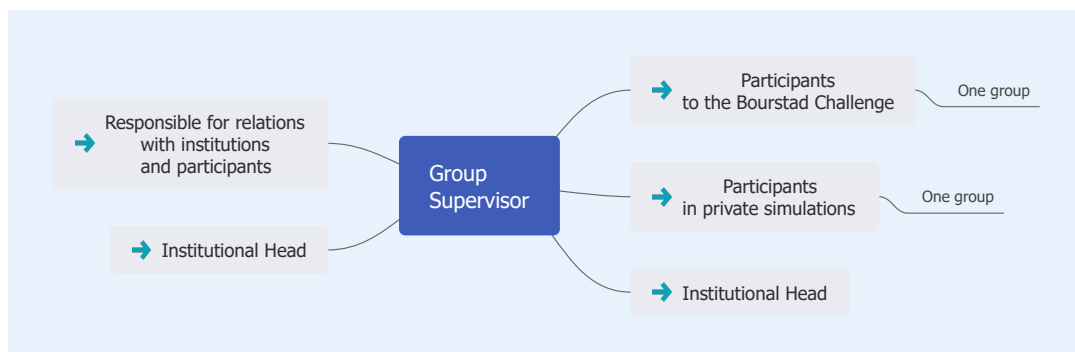
The group supervisor can issue notifications to:

- A group of participants in the Bourstad Challenge
- A group of participants in a private simulation
- the institutional head of Bourstad in his school

The group supervisor can issue notifications to:

- the person responsible for relations with institutions and participants
- the institutional head of Bourstad in his school

Figure 38. Notifications that can be issued or received by the group supervisor



## Writing a notification

Teachers can create notifications for participants in the Bourstad Challenge or in a private Bourstad simulation organized at their institution.

The institutional head and group supervisors access the notification system by requesting the *Notifications* feature in the teacher's menu. This feature is available to a leader in both the teacher and participant view profiles.



### Note:

Please note, however, that students who participate in Bourstad simulations are not allowed to write notifications.

When you click on the *Notifications* menu choice in the menu, the main page of the notification system is displayed. Then click on the *Write Notification* button to start writing a notification. The steps to follow are shown below.

Figure 39. How to write a notification

The screenshot shows the Bourstad notification system interface. The sidebar on the left has a menu with 'Notifications' highlighted. The main area is titled 'Compose a notification'. The interface includes the following elements:

- 1 To:** Institutional Head (dropdown menu)
- 2 Distribution:** Start Date (2022-01-24) and End Date (2022-02-11)
- 3 Language:** FR (unchecked) and EN (checked)
- 4 School:** Collège de Rosemont (dropdown menu)
- 5 Group:** Collège de Rosemont, Groupe 1 (dropdown menu)
- 6 Subject:** Invitation to a kick-off meeting for the contestants in the Bourstad Challenge
- 7** Text editor toolbar with options like bold, italic, underline, and font color.
- 8** Text area containing a draft notification:
 

Hello,

All the school participants in the 2022 Bourstad Challenge are invited to a kick-off meeting that will be held on February 10 at 2 pm.

We will be discussing

  - the Bourstad platform
  - Bourstad lists of securities
  - tasks to perform and deadlines in the Challenge

Here's the link to register for this meeting : <https://us02us.zoom.us/jtce588h>
- 9** Send button

### 1. Choose the type of recipient for the notification:

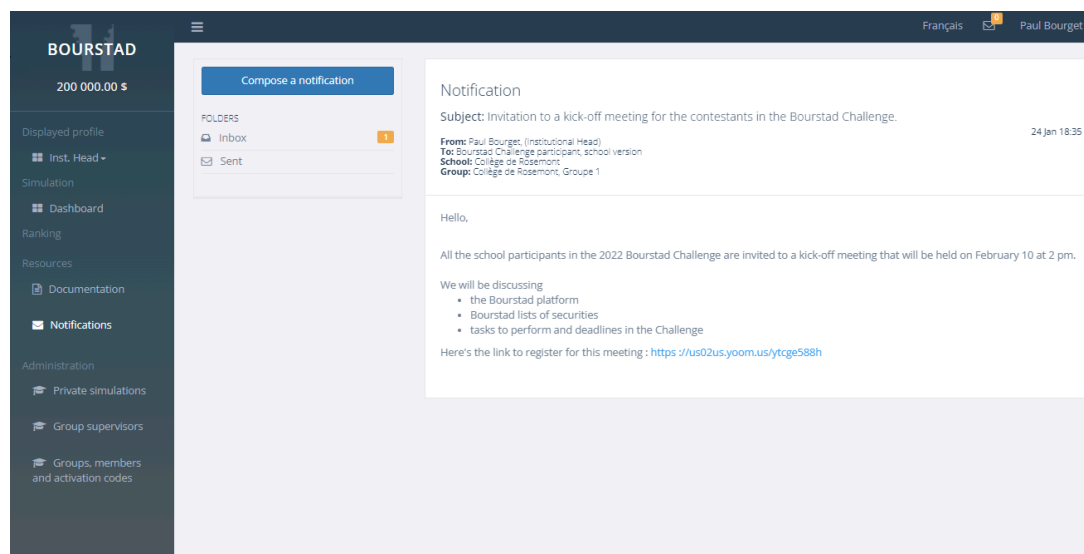
- Bourstad Challenge participants
- Participants in a private simulation

2. Determine the period of time within which the targeted participants who log in to the Bourstad platform will receive the notification.
3. Indicate whether the notification is in English or French; a notification can be in both English and French. The participants you target will see the notification regardless of the language choice you make.
4. Select the school for which you are acting in sending this notification.
  - a. If the notification is for participants in a private simulation, an additional field appears to select a private to select a private simulation;
  - b. You then have 2 possibilities:
    - choose a single private simulation
    - choose all the private simulations of the school
5. You have 2 choices to join the participants of a simulation within the school:
  - Target a group of this simulation within your school
  - Target all participants of this simulation within your school
6. Specify the title of the notification. This is the text that will appear in the notification mini-box when the envelope icon at the top of the screen is clicked.
7. The notification editor toolbar allows you to write a notification in rich content. These features allow you to :
  - format the text
  - insert a table
  - insert bulleted or numbered lists
  - insert tables
  - insert hypertext links
8. Illustration of the functionalities in the editing area
9. Click *Send* to send the notification

## The Sent Items box

The Sent Items box allows you to view the list of notifications that you have sent to simulation participants in your school. If you click on any of the notifications in the list, its detailed content is displayed..

Figure 40. Displaying a sent notification



The title, content and all targeting parameters of the selected notification are displayed

## Tracking the distribution of a notification

After issuing a notification to participants in a simulation, school officials can view a table with information about the participants who viewed that communication.

When an institutional head or group supervisor displays a notification that he or she has sent to the participants of a simulation, a table appears at the bottom of the notification to inform about its consultation by the targeted persons.

Figure 41. Illustration of the notification tracking table

| Follow-up of the distribution of this notification |                     |                  |                  |
|--|---------------------|------------------|------------------|
| Name   | Email               | Connected on     | Read on          |
| Sharon Nguyen                                      | test221128b@iclf.ca |                  |                  |
| Helen Bianchi                                      | test221212c@iclf.ca |                  |                  |
| Peter White  | test221017b@iclf.ca |                  |                  |
| Alex Rodriguez                                     | test221017a@iclf.ca | 2022-11-28 15:44 |                  |
| Jean Smith   | test221128a@iclf.ca | 2022-11-28 15:46 | 2022-11-28 15:47 |

On this image, we can see that the notification targets 6 participants. Since the notification was issued, two of these participants have logged on to the Bourstad platform, Alex Rodriguez and Jean Smith. Only Jean Smith effectively viewed the notification during a work session on the Bourstad platform.

## Chapter 6. Video animation illustrating the four functionalities for Institutional Heads.

This animation illustrates with examples the three functionalities for Birstad Institutional Heads within their school. Duration: 11 minutes 26 seconds.

<https://player.vimeo.com/video/251560346>