



Table of Contents

Accessing the Course/Section	2
Search for the Desired Course	3
Part 1: Tasks/Functions Prior to Course Section's Meeting	4
Add Learner – Manually add an individual learner to the roster or waitlist.	4
Add Learner Advanced – Manually add multiple users to the roster or waitlist.	5
Remove Participants – Remove participants from the Roster or Wait List.....	6
Email All – Send an email to participants on the roster and/or the waitlist.	7
Messages – Send Registration Confirmations, Section Reminders, and Course Completion Emails.	8
Waitlist – View and edit the section's waitlist.....	8
Sign In Sheet – Print Sign In sheet with optional section QR code (for use with the Truenorthlogic Mobile App).	9
Export – Export a .csv file of the roster to edit in a spreadsheet.	9
Name Tags – Print Name Tags or Table Tents (with optional QR codes for the Truenorthlogic Mobile App) for participants in the roster.	10
Roster Table – Remove a participant or move them to a waitlist.	11
Part 2: Tasks/Functions During Course Section's Meeting	11
Attendance – Mark participants as attended for class times.....	11
Part 3: Tasks/Functions After Course Section's Meeting.....	11
Roster Status – Update the Grade and/or Registration Status for participants.	11
Manage Credits – Adjust credit for multiple users.....	12
Attendance Hourly Percentage Credit – Participants will receive the percentage of the credits based on the number of hours they attended.	13
Roster Table – Lock participants from bulk changes.	13

Once a course and section have been created, an instructor can be assigned to administer the section. This individual may also be the person who is teaching the content of the course, however, it is required that this person have a district login and access to the **PLZ portal**. This person, or instructor, will have access to a variety of administrative functions related to the section of the course.

This document is designed to give an overview of the tasks and administrative functions that a course instructor can access through the Truenorthlogic PD tools. While instructors have these rights for a single designated course, an office administrator can access these functions for any course within their given office. The document is divided into three parts, each pertaining to a different part of the section's sequence:

Part 1: Tasks/functions that can be accessed prior to conducting the course's section.

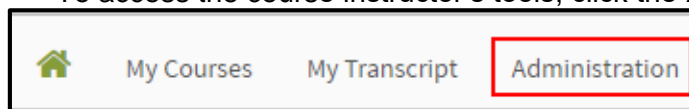
Part 2: Tasks/functions that can be accessed while the course's section is in its meeting phase.

Part 3: Tasks//functions that can be accessed after the course's section has concluded.

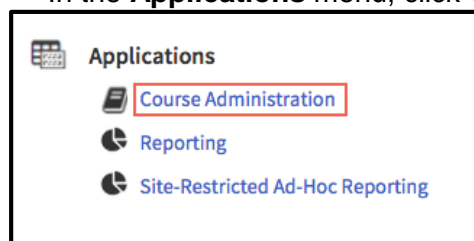
Note: While tasks in this document are organized in relationship to places where they are most likely used, they will still be accessible and functional in other iterations of the course.

Accessing the Course/Section

- To access the course instructor's tools, click the **Administration** tab.



- In the **Applications** menu, click **Course Administration**.



Search for the Desired Course

- In the **Search Learning Opportunities** screen, enter search criteria to locate the desired course.
- Click **Search**.
- If you don't know the course title, click **List All**. This will display all courses for which you have been identified as a **course instructor**. If you are an **Office Administrator**, the list displays all courses within your office.

Search Learning Opportunities

Search Criteria

Course Title: Contains []

Description: Contains []

Date: ☐ Only include courses with Start date [] Before [] 06/23/2016

Learning Opportunity Type: All []

Stipend: - No Choices Available -

Section #: []

Course #: []

Location Name: - No Choices Available -

Include Archived: ☐

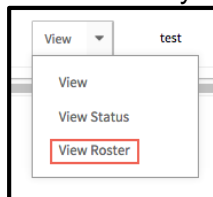
More Options

List All Search

- Click the **title** of the course to view the course information.

#	Title
1.	10089 Test

- Scroll to **Sections** at the bottom of this page.
- At the very bottom, click the arrow to access the **drop-down menu** and select **View Roster**



- Course Information will appear at the top of the page. In the middle of the page, a set of **menu buttons** will display. Use these buttons to access additional section functions. Additionally, the roster table is displayed below the buttons.

Add Learner Add Learner Advanced Waitlist Remove Participants Attendance

Attendance Hourly Percentage Credit Sign In Sheet Name Tags Messages Email All Export

Manage Credits

Roster Status

Show Columns:

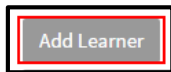
☒ District / School ☒ Registration Status ☒ Registration Details ☒ Credits

#	Name	District / School	Attendance	Registration Status	Registration Details	Credits
1.	[]	Cincinnati Public Schools, Hyde Park	0/0	Incomplete	Enrolled On: June 22, 2016 Last Status	- Not Set -

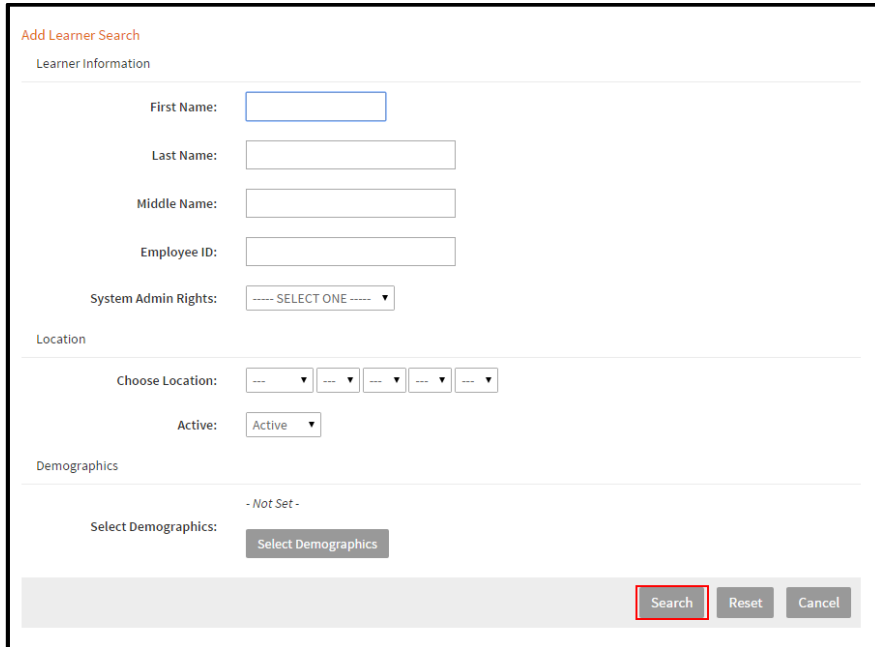
Part 1: Tasks/Functions Prior to Course Section's Meeting

Add Learner – Manually add an individual learner to the roster or waitlist.

- From the buttons displayed on **Section Roster** screen, click **Add Learner**.



- Enter relevant search criteria to locate the desired user. Click **Search**.

A form titled "Add Learner Search" with sections for "Learner Information", "Location", and "Demographics".

Learner Information

First Name:

Last Name:

Middle Name:

Employee ID:

System Admin Rights:

Location

Choose Location:

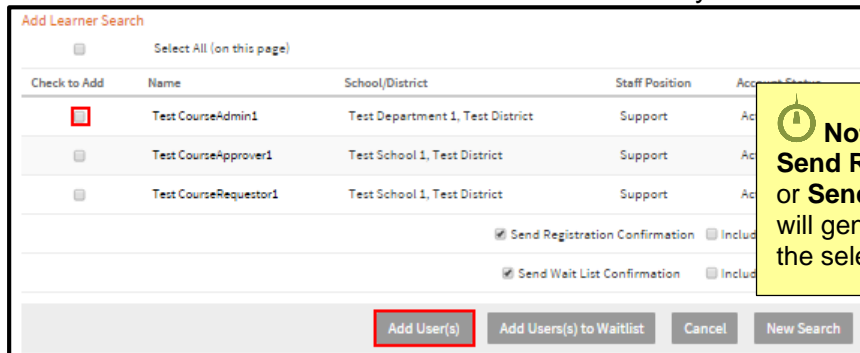
Active:

Demographics

- Not Set -


Select Demographics:

- Place a **checkmark** next to the name of the user you desire to add. Click **Add User(s)**.

A table titled "Add Learner Search" showing search results. The table has columns: "Check to Add", "Name", "School/District", "Staff Position", and "Account Status".

Check to Add	Name	School/District	Staff Position	Account Status
<input checked="" type="checkbox"/>	Test CourseAdmin1	Test Department 1, Test District	Support	Active
<input type="checkbox"/>	Test CourseApprover1	Test School 1, Test District	Support	Active
<input type="checkbox"/>	Test CourseRequestor1	Test School 1, Test District	Support	Active

☒ Send Registration Confirmation ☐ Include
☒ Send Wait List Confirmation ☐ Include

 **Note:** Checking the box for **Send Registration Confirmation** or **Send Wait List Confirmation** will generate and send an email to the selected user(s).

Add Learner Advanced – Manually add multiple users to the roster or waitlist.

- From the buttons displayed on **Section Roster** screen, click **Add Learner Advanced**.

Add Learner Advanced

- Click the radio button next to the type of identifier you are going to use. For example: if you have a list of email address, select Email Address.

Enter Users
Select the type of identifier:

- ☒ Employee ID
- ☐ Username
- ☐ Email Address
- ☐ TNL Person Id

- Enter or Copy and Paste the identifiers in the box and select how they are separated.

Select the type of separator:

- ☒ New Line
- ☐ Comma
- ☐ Tab
- ☐ Other:

Please input the identifiers below:

- Select whether the group should be added to the Roster or the Wait List. Place checks next to **Send Registration Confirmation** or **Send Wait List Confirmation** to generate and send an email to the users.

Add users to:

- ☒ Roster
- ☐ Wait List
- ☒ Send Registration Confirmation
- ☒ Send Wait List Confirmation

- Click **Preview** to begin searching for associated users to the identifiers provided.

Preview

- Review the associated name and click **Add Users** to add the users to either the roster or waitlist.

User Preview				
3 Record(s)				
Name	Email	Demographics	Sites	Current Status
Miller, Justin	jumiller@truenorthlogic.com	—	—	Not Registered
Principal1, Test	jumiller@truenorthlogic.com	Administrative	Test School 1	Not Registered
Teacher1, Test	jumiller@truenorthlogic.com	Instructional	Test Department 1 Test School 1 Test School 2	Not Registered
Add 3 Users Cancel				

Remove Participants – Remove participants from the Roster or Wait List

- Click **Remove Participants**.

Remove Participants

- Place a check next to the participants you wish to remove and click **Delete**.

Status: ☐ Completed ☐ N/A ☐ Registered ☐ Revoked

☐ Delete All

	Name	Date Enrolled	Status	Email Address
1.	Teacher1, Test	Feb 3, 2016 1:14 PM	N/A	jumiller@truenorthlogic.com
2.	Teacher2, Test	Feb 3, 2016 4:22 PM	Completed	noreply@truenorthlogic.com
3.	Teacher3, Test	Feb 3, 2016 4:22 PM	Revoked	noreply@truenorthlogic.com
4.	Teacher4, Test	Feb 3, 2016 4:22 PM	Registered	noreply@truenorthlogic.com

Wait List

☐ Delete All

	Name	Date Enrolled
1.	CourseApprover1, Test	Mar 23, 2016 11:32 AM
2.	CourseAdmin1, Test	Mar 23, 2016 11:32 AM
3.	Courserequester2, Test	Mar 23, 2016 11:32 AM
4.	courserequester1, test	Mar 23, 2016 11:32 AM

☐ Send notification emails (Note: Notifications will not be sent to participants being removed from the waitlist.)

Delete Cancel

- To send notification emails to individuals removed from the roster. Place a check next to **Send notification emails**.

☐ Send notification emails (Note: Notifications will not be sent to participants being removed from the waitlist.)

Delete Cancel

- Use the **Status** checkboxes to select every participant with the selected status.

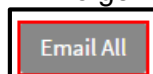
Status: ☐ Completed ☐ N/A ☐ Registered ☐ Revoked

☐ Delete All

	Name	Date Enrolled	Status
1.	Teacher1, Test	Feb 3, 2016 1:14 PM	N/A
2.	Teacher2, Test	Feb 3, 2016 4:22 PM	Completed
3.	Teacher3, Test	Feb 3, 2016 4:22 PM	Revoked

Email All – Send an email to participants on the roster and/or the waitlist.

- To generate an email to all section participants, click **Email All**.



- Fill in the desired fields of the email.

A screenshot of the "Email Roster" form. The form has a title "Email Roster" in red. It contains several fields: "Sending Roster Message to:" with sub-fields "Course Title: Test" and "Section Title: Test 1"; "Subject:" with a text input field containing "Enter the subject here"; "Also send to:" with a text input field containing "Enter comma separated list of emails here"; a rich text editor for the "Message" with a toolbar and a text area containing "Message (Sent exactly as typed) Use SHIFT+ENTER for single spacing"; "Add Attachment (Max size: 20.0MB)" with a "Choose File" button and "No file chosen" text; and an "Attach" button. The "Current Attachments" section is empty. Red boxes highlight the "Subject", "Also send to", and "Attach" areas.

- Place a **checkmark** next to all intended recipients. You can place a checkmark next to **All** to send the email to all learners.

A screenshot of a table with two columns: a checkbox column and a "Name" column. The first row has a checked checkbox and the name "(All)". The second row has an unchecked checkbox and the name "CourseApprover1, Test". The third row has an unchecked checkbox and the name "CourseRequestor1, Test". A red box highlights the checkboxes for the two individual recipients.

- If you desire to send the email to individuals on the section's wait list, scroll down and make appropriate selections in the **Wait List** portion of the screen.

A screenshot of a table titled "Wait List" with two columns: a checkbox column and a "Name" column. The first row has an unchecked checkbox and the name "(All)". The second row has a checked checkbox and the name "CourseApprover1, Test". The third row has an unchecked checkbox and the name "CourseAdmin1, Test". The fourth row has an unchecked checkbox and the name "Courserequester2, Test". The fifth row has an unchecked checkbox and the name "courserequester1, test". A red box highlights the checkbox for "CourseApprover1, Test".

- When finished, click **Send**.

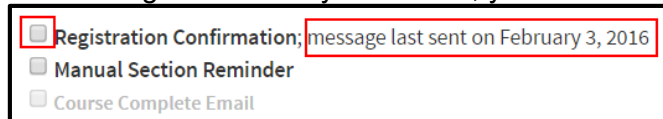
A screenshot of two buttons: "Send" and "Cancel". The "Send" button is highlighted with a red box.

Messages – Send Registration Confirmations, Section Reminders, and Course Completion Emails.

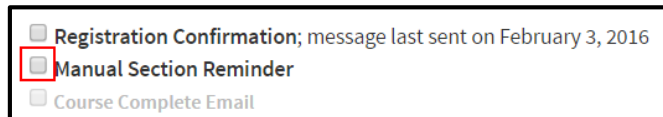
- Click **Messages**.



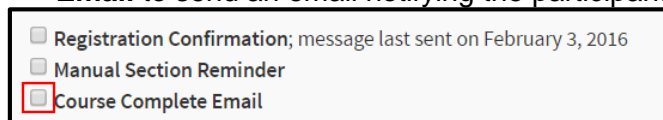
- Next to the participant's name, place a checkmark next to **Registration Confirmation**. If this message has already been sent, you will see a "message last sent..." note next to this option.



- Place a check next to **Manual Section Reminder** to send a reminder email to the participant.



- When the participant has been marked as completed, place a check next to **Course Completion Email** to send an email notifying the participant of the change.

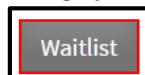


- Scroll to the bottom of the page, and click **Send Message**.



Waitlist – View and edit the section's waitlist.

- Click **Waitlist**.



- Individuals on the **Waitlist** will display on the page. To *manually override the course settings* and add a waitlisted individual to the roster, click **Register** next to the name.

#	Name	District / School	Credit Hours	Date Added	
1.	<div>X</div> CourseApprover1, Test Status: Active <u>Demographics:</u> District	Test District, Test Department 1	2.0 Credits In District Credit	Mar 23, 2016 12:32 PM	<div>Register</div>

- To remove a participant from the waitlist, click the **X**.

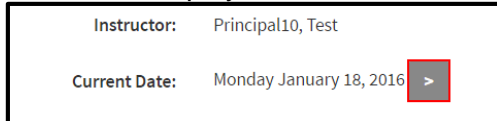
#	Name	District / School	Credit Hours	Date Added	
1.	<div>X</div> CourseApprover1, Test Status: Active <u>Demographics:</u> District	Test District, Test Department 1	2.0 Credits In District Credit	Mar 23, 2016 12:32 PM	<div>Register</div>

Sign In Sheet – Print Sign In sheet with optional section QR code (for use with the Truenorthlogic Mobile App).

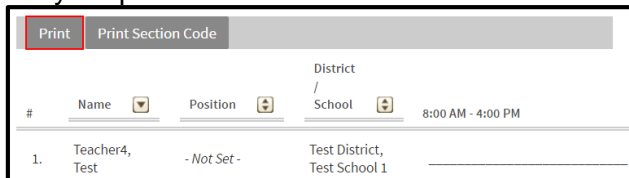
- Click **Sign In Sheet**.



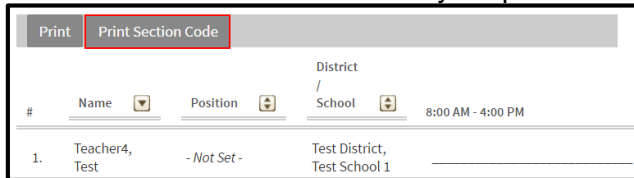
- If the section has multiple class times, select the appropriate date by clicking the **Arrow** until the date is displayed.

A form showing "Instructor: Principal10, Test" and "Current Date: Monday January 18, 2016" followed by a right-pointing arrow button with a red border.

- A new window will load. Click **Print** above the roster and follow on screen instructions related to your printer.

A screenshot of a web interface. At the top, there are two buttons: "Print" (highlighted with a red border) and "Print Section Code". Below them is a table with columns: "#", "Name" (with a dropdown arrow), "Position" (with a dropdown arrow), "District / School" (with a dropdown arrow), and "8:00 AM - 4:00 PM". The first row of the table contains: "1.", "Teacher4, Test", "- Not Set -", "Test District, Test School 1", and an empty field.

- If you would like to include the section-specific QR code, click **Print Section Code** and follow on screen instructions related to your printer.

A screenshot of a web interface, similar to the previous one. The "Print Section Code" button is highlighted with a red border. The table below it has the same structure and content as the previous screenshot.

Export – Export a .csv file of the roster to edit in a spreadsheet.

- Click **Export**.



- Click **Export: Export Roster** to open a report showing all information in the roster.



- In the upper right corner of the report, click **Download CSV**.

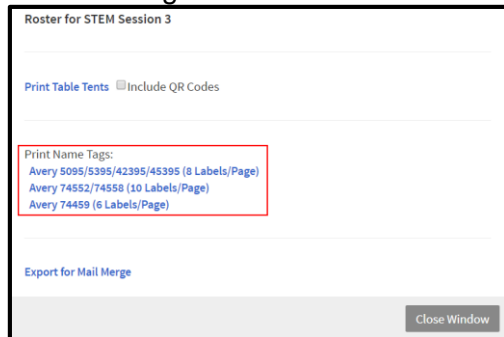


Name Tags – Print Name Tags or Table Tents (with optional QR codes for the Truenorthlogic Mobile App) for participants in the roster.

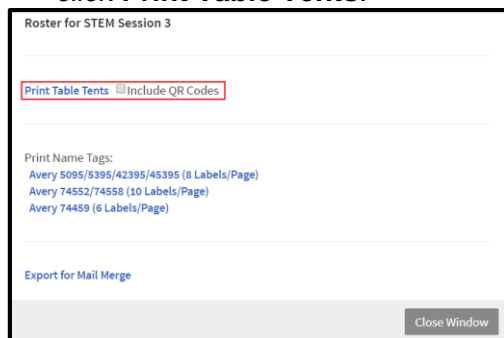
- Click **Name Tags**



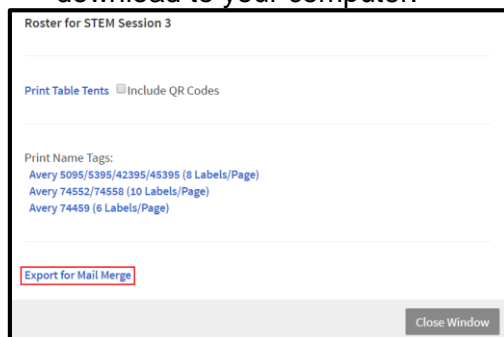
- A new window will load. To print name tags, select the format you would like to use and print the name tags.

A screenshot of a web application window titled "Roster for STEM Session 3". It contains a "Print Table Tents" link and an "Include QR Codes" checkbox. Below this is a section titled "Print Name Tags:" with three options: "Avery 5095/5395/42395/45395 (8 Labels/Page)", "Avery 74552/74558 (10 Labels/Page)", and "Avery 74459 (6 Labels/Page)". There is also an "Export for Mail Merge" link and a "Close Window" button at the bottom right.

- To print table tents, select whether you would like to include participant-specific QR codes and click **Print Table Tents**.

A screenshot of the same web application window. The "Print Table Tents" link is now highlighted with a red rectangular border.

- To export the roster information to use in a mail merge, click **Export for Mail Merge**. A .csv file will download to your computer.

A screenshot of the same web application window. The "Export for Mail Merge" link is now highlighted with a red rectangular border.

Roster Table – Remove a participant or move them to a waitlist.

- The roster table is on the roster screen under the buttons described above.

Show Columns: ☒ District / School ☒ Grade ☒ Registration Status ☒ Registration Details ☒ Credit Hours ☒ Stipend Cost

#	Name	District / School	Grade	Registration Status	Registration Details	Credit Hours	Stipend Cost
2.	Teacher2, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set -	Completed	Enrolled On: February 03, 2016 Last Status Change: February 03, 2016 Completed On: February 03, 2016	2.0 Credits In District Credit	\$0.00

- Use the checkboxes in the **Show Columns** area to change which columns are displayed. In the **Actions** menu, select either **Remove from Roster** or **Move to Waitlist**.

Show Columns: ☒ District / School ☒ Grade ☒ Registration Status ☒ Registration Details ☒ Credit Hours ☒ Stipend Cost

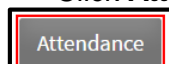
#	Name	District / School	Grade	Registration Status	Registration Details	Credit Hours	Stipend Cost
2.	Teacher2, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set -	Completed	Enrolled On: February 03, 2016 Last Status Change: February 03, 2016 Completed On: February 03, 2016	2.0 Credits In District Credit	\$0.00

- Other features of the roster table will be described in later parts of this document.

Part 2: Tasks/Functions During Course Section's Meeting

Attendance – Mark participants as attended for class times.

- Click **Attendance**.



- Mark participant attendance by placing a check in the **Attended** check-box. Additionally, you may select either **Attended All** or **Absent All** for each individual or **All Attended** or **All Absent** under the drop down menu attached to the date.

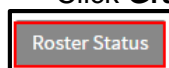
Name	ID	Attended All	Absent All	Monday 07/27/2015 05:00 PM ▼	Tuesday 07/28/2015 05:00 PM ▼	Wednesday 07/29/2015 05:00 PM ▼	Thursday 07/30/2015 05:00 PM ▼	Friday 07/31/2015 05:00 PM ▼
Teacher1, Test	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teacher10, Test	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teacher2, Test	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teacher3, Test	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: If a course has more than one meeting date/time, attendance should be taken for each session.

Part 3: Tasks/Functions After Course Section's Meeting

Roster Status – Update the Grade and/or Registration Status for participants.

- Click **Grade/Roster Status**



Note: Your portal may not have grades included as part of the roster.

- If you desire to change roster status or grade of all participants at once, click on the **drop-down menu** and make the appropriate selection.

Change all Roster Status to:

<Select One>

*Note: When using 'Apply All,' or when changing the grade on an individual, the final Roster Status will be subject to the auto change registration status rules that may be set for the grade you've chosen. These rules can be viewed by super-administrators from the 'Section Grades' menu option.

Save This Page - Save all of the values that are set in the table below

Apply All - Take the values show above and apply them to everyone on the roster

Apply - Take these values and set them into the boxes below

- If you need to make edits to individual participants, use the dropdown menus associated with each individual user.

Save This Page Cancel

#	Name	District / School	Registration Status	Attendance	Registration Details	Credit Hours
1.	Administrator, TrueNorth ID: 22-444-66 noreply@truenorthlogic.com Phone: 801-453-0136 Demographics: Support Staff	Test District, Test School 1 Test District, Test School 2	Registered	0/0	Enrolled On: June 27, 2016 Last Status Change: June 27, 2016	0.0 Contact Hours Knowledge of Literacy

- When finished, click **Save This Page** to save your selections.

Save This Page Cancel

Manage Credits – Adjust credit for multiple users.

- Click **Manage Credits**.

Manage Credits

- The credits for all unlocked individuals can be changed at the top of the page. Enter the desired credit amount in the correct credit type and click **Update Learners**.

STEM Session 3 Roster

Bulk Credits

To update credits for all unlocked learning in the roster, enter the credit amount and click the Update All Learning button. This action cannot be undone.

In District Credit Credits Salary Advancement Credit Credits

1

Update 2 Learners

- The credits for individuals can be edited at the bottom of the screen. Enter the desired number of credits in the correct credit type. The information will save after each credit is entered.

Individual Credits			
3 Learners. 1 Locked / 2 Unlocked			
Recipient	Location	In District Credit Credits	Salary Advancement Credit Credits
Teacher4, Test	Test School 1	<input type="text" value="2.0"/>	<input type="text" value="2.0"/>
Teacher3, Test	Test School 1	2.0	—
Teacher2, Test	Test School 1	<input type="text" value="2.0"/>	<input type="text" value="1.0"/>
3 results			

- Click **Done** to return to the roster.



Attendance Hourly Percentage Credit – Participants will receive the percentage of the credits based on the number of hours they attended.

- Click on **Attendance Hourly Percentage Credit**.



- A new window will open. Click **Update** to adjust every unlocked participant's credit. If you use this, a participant which only attends 3 of the 5 available hours, will only receive 60% of the credit.

Attendance Hourly Percentage Credit			
<p>Registrant's will receive the percentage of credits based on the total hours they attended. Note: This will only modify the credit for unlocked participants.</p> <p>Example:</p> <p>The course is worth a maximum of 5 credits. If the participant attended (3 of 5) hours of class time they would receive 60% (3 credits) of 5 available for the course.</p>			
Date	Length	Attended	
1. 1/23/2013 12:00-2:00	2 hr	<input checked="" type="checkbox"/>	
2. 1/24/2013 12:00-2:00	2 hr	<input type="checkbox"/>	
3. 1/25/2013 1:00-2:00	1 hr	<input checked="" type="checkbox"/>	
Totals		Available Hours 5	Attended Hours 3
<input type="button" value="Update"/>			

Note: It is possible that the number of credits assigned for this course will be a decimal based on the number of hours attended.

Roster Table – Lock participants from bulk changes.

- Under the buttons on the roster page is the roster table.

#	Name	District / School	Grade	Registration Status
1.	Teacher2, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Completed
2.	Teacher3, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Revoked
3.	Teacher4, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Registered

Note: Not every portal will have the lock option.

- Click the **Lock** to prevent this participant's information from being changed without unlocking. Click the **Lock** at the top of the table to lock every participant.

#	Name	District / School	Grade	Registration Status	Registration Details	Credit Hours	Stipend Cost
1.	Teacher2, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Completed	Enrolled On: February 03, 2016 Last Status Change: February 03, 2016 Completed On: February 03, 2016	2.0 Credits In District Credit	\$0.00
2.	Teacher3, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Revoked	Enrolled On: February 03, 2016 Last Status Change: February 03, 2016	2.0 Credits In District Credit	\$0.00
3.	Teacher4, Test noreply@truenorthlogic.com Demographics: Instructional	Test District, Test School 1	- Not Set	Registered	Enrolled On: February 03, 2016 Last Status Change: February 03, 2016	2.0 Credits In District Credit	\$0.00

- Click the **Lock** icon again to unlock the user to allow their information to be edited.

District / School
Test District, Test School 1
Test District, Test School 1
Test District, Test School 1