WorkReady MOBILE®

Organization Admin User Guide

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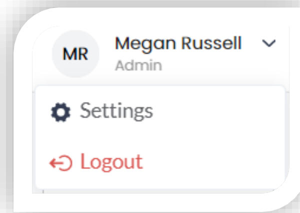
User Guide Contents

Settings Menu



- Access the settings menu by selecting ⌄ to the right of the User's name and role.

Update Profile

- In the **PROFILE** tab, you can update the following personal information:
  - Profile Image
  - First Name, Last Name, Time Zone
  - This is also where you can change your password or delete your account.
  - To access the Spanish version, navigate to where it says **Language** and select the dropdown option labeled "Spanish." The page will refresh and display the system in Spanish.

  *You can also access Terms and Privacy information

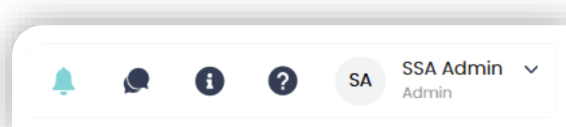
Update Notification Settings

- Select **NOTIFICATIONS** to update your settings and phone & email address
- Select Add a mobile device to add a mobile device to your account. You can also make this your "Primary" which means you will Log In using your mobile number.
- Select Add an email address to add an email address to your account.
- To change notification settings on a particular email address or phone number, select ••• on the right. Then, you can remove, disable, or designate your primary contact.

Multilingual Capability

- Go to your browser's settings to change your language settings for your browser. Once the new language has been applied, See Translation should appear underneath private message text.
  - Once you click See Translation, the text above will translate into the language set by the browser.
  - Click See Original to revert the text back to its original language.

Support Toolbar



This is the listing of four icons to the left of the username and role at the top right of the webpage. Icons for 'Notifications', 'Messages', 'About Us', and 'Help' section

Notifications

- Select the 🔔 icon to view your notifications.
- Click a notification to be directed to the location of the item.

Messages

- Select the icon to view your recent messages.
- Click a message to be directed to the message thread location.

About Us

- Select the icon to view the Organization's About Us page.
- Communicate with the WorkReady Mobile team with AdvanceNet to update your About Us page.

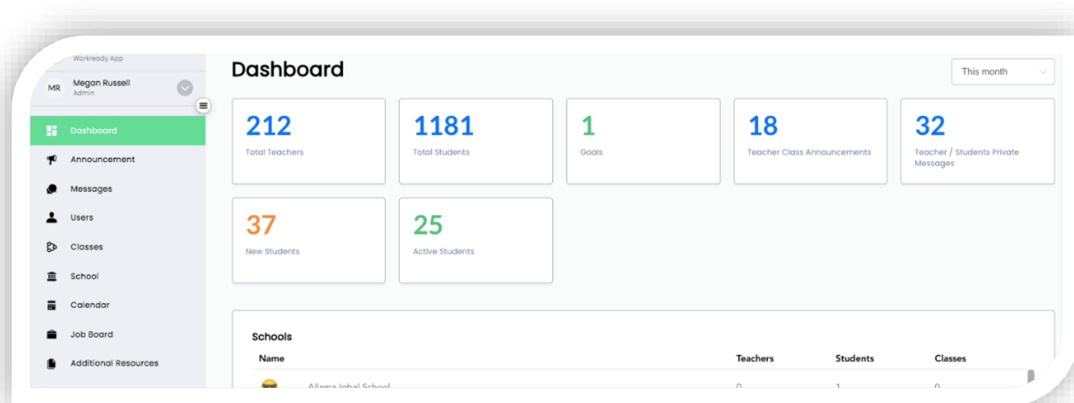
Accessing Support

- To access support, select the button on the support toolbar.
- then select the button.

*You can also either email support@workreadymobile.com with your issue, or visit https://support.workreadymobile.com to access support articles or to create a support ticket.

Dashboard

- This displays updated data and statistics in real-time when you log into your web portal. Info displayed includes the total number of students, teachers, classes per school and broken down by school, as well as the breakdown for student activity from your district.
    - To filter **All Section** results by time frame, click on the top right dropdown option.
        - You can filter by the Current Month or the Previous Month
        - The Current Quarter or the Last Quarter
        - The Current Year or the Last Year
    - To filter **Messages, Active Students and Goals** by school
        - Select the dropdown in the right corner of the module and select the school you would like to isolate.
        - Then, you can filter the table by the teachers within that school.



Admin Tools

Home Page Notices

- Notices are interchangeable messages that display on the App version of WorkReady Mobile. These are shown to all Schools and App users within the district.
    - To Add a Notice, select Add notice in the top right corner:
        - Create a Notice Title & Description
        - Click **Save**
    - To Edit or Delete a Notice, select ••• to see the action items.
    - Select the icon to edit the ability for Notices to auto-scroll across the screen, or if they need to be manually swiped by the user.
        - Click the toggle icon in the *on* position to enable auto-scrolling.
        - Click the toggle icon in the *off* position to disable auto-scrolling.

Automated Notifications

- Found under Admin Tools. An Automated Reminder is used to send scheduled push notifications to those who have elected to receive such notifications.

- The following are the types of Automated Reminders that you can setup & manage:
    - Goal Reminders
    - Calendar Reminders
    - Add to Class
    - Complete Signup Notification
    - Welcome Message
    - Remove from Class
    - Admin Signup
    - School Change (School Admin)
    - School Change
    - Role Change
    - Owner Status

- To prevent teachers from receiving class event notifications, remove them from the recipient settings for the Class Event notification.

- To create an Automated Notification:
    - Select Create New
    - To set the Trigger time for these Reminders to be set, select whether the notification is going to be sent "On the Day" or "Before the Day."
    - If the trigger is to be set before the set Goal date, select how many days or weeks by utilizing the dropdown options.
    - Select the box under "Event" to set the type of event that the notification will be pushed to subscribed users.
    - Select the box under "Send To" to set the type of user that the notification will be sent.

- Click + Add New Trigger to create a set time and messaging method.
  - Decide whether you want the message to go out via:
    - SMS, Email, and/or Push
- Click in the text box labeled "Message" and type out the message that will display within the notification.
  - Use the @ symbol to add specific words into the message (@Goal, @Date). Our system will automatically retrieve the content from the database to be included in the message.
- Click **Save**

Configurations

1. Select **Configurations** from the Admin Tools menu
2. The system-wide, organizational configuration options are controlled here.
3. **Class People List Visible** – turn this off if your organization policy prohibits students from accessing the list of other students in the class/group.
4. **Student can edit attendance** – turn this off if your organization uses the attendance feature but does not allow students to enter or edit their attendance.

Reports

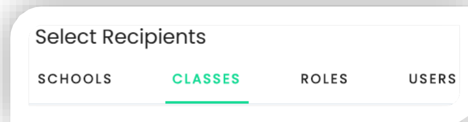
1. Select **Reports** from the Admin Tools menu
2. There are three tabs (pages) with report options. – Class, Users, and Students
3. An Org Admin can filter the reports for all schools in the district.
4. Option to filter some of the reports down to the teacher and class level.
   - You can run a report for Participation, Announcements, Class Messages, Student Activity, Assessments, Attendance, and Total Number of Users.
5. The Start and End dates are for the date range for the participation levels or event.
6. Once the filters are set for a report, click Export to send an Excel to your email.

Messages

You can send messages to the entire school and any class or student in the school through the "Messages" feature. You are also able to send to and receive messages from the other Organization Admins for your District/Organization.

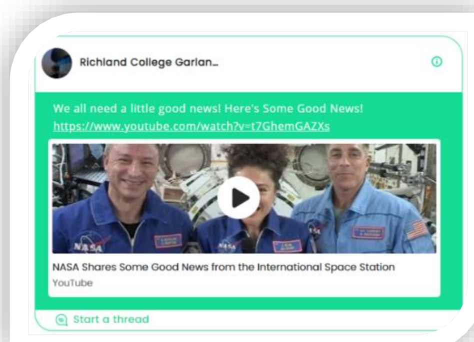
- Select Messages from the main menu.
- To change your Messages page view, select from the options in the dropdown menu next to the Search bar.
- Select from the available Schools, Classes, and students to send announcements or direct messages.
  - Use the message box at the bottom for School or Classes.
  - A message to a school will alert every user within the school.

- To customize recipients, select **New Message** in the top right corner.
    - Select the **SCHOOLS** tab at the top to select one or multiple schools to receive a message.



    - If your organization is using the Programs feature, then a **PROGRAMS** tab is available to send a message to an entire program.
    - Select the **CLASSES** tab at the top to select one or multiple classes to receive a message.
        - All members using WorkReady Mobile who are in the class will receive the message that you send.
    - Select the **ROLES** tab to send an announcement to all users for the selected role and school(s). The message is only visible for the selected role.

    - Select the **USERS** tab at the top to select one or multiple users.
        - This message will send to all the selected users; however, it will create private chat with each user - not a group message.
    - A preview of your message will populate to the right of the text box, displaying what the SMS message will look like.
    - Announcement SMS messages have a character limit of 300 characters.
        - If the message extends past 300 characters, the rest of the message will be available in the App via a link.
    - You have the option to **Schedule** your announcement. Click Schedule then:
        - Select the Date and Time options and click to **Schedule** the message.
        - The message will be sent by the system as scheduled.

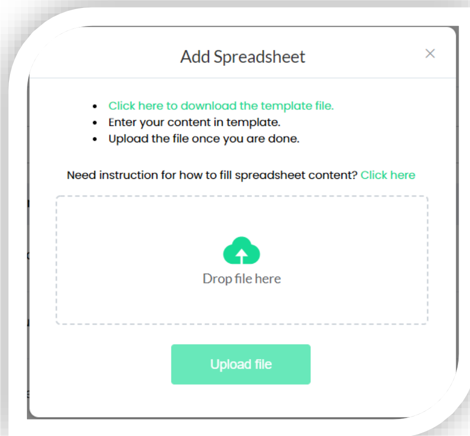


    - If you post an **online video URL** in the message, **the video will populate in the message**, and recipients will have the ability to view the video in the message.
    - If not scheduled, click the Send button once your announcement is complete.

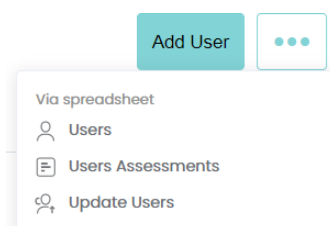
- As an Organizational Admin, you have the permissions to **delete** all messages or announcements created by other users.
    - Click the ••• next to a message and select 'Delete' and the post will disappear.

Users

- On the User Management Page, you will find a menu where you can access the names and accounts for all users from your district.
    - You can search users from the search bar.
    - Narrow the search results further by selecting the toggle icon filtering by:
        - School
        - Role
        - Status

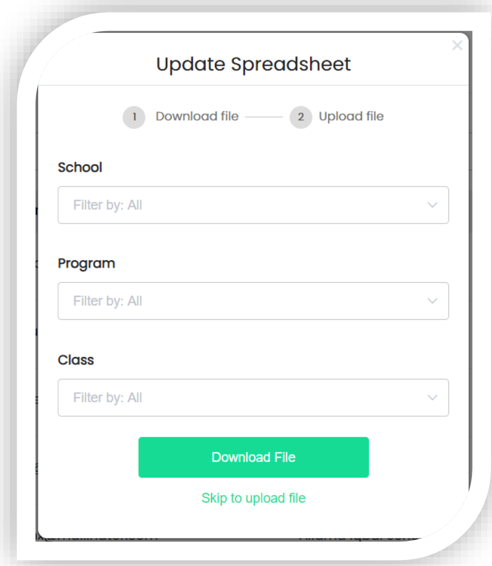


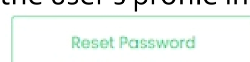
- Add Users Via Spreadsheet Upload
    - You will find a dropdown in the top right corner where you can **Add Users** Via a **Spreadsheet Upload**
        - Select "Add via Spreadsheet
        - Select the Spreadsheet Upload Topic of your choice.
        - Follow the Directions:
            - Select "Click here to download the template file" to ensure that your upload information is organized in a way that the system will understand.
            - There are also directions on how to fill out the content for the spreadsheet.
        - Drag and Drop or Upload document from your computer.
        - Select "Upload File"



- Add Users Assessments
    - You can add User Assessments through a spreadsheet upload
        - Select the three-dot action menu in the top right
        - Select "Users Assessments"
        - Follow the Directions:
            - Select "Click here to download the template file" to ensure that your upload information is organized in a way that the system will understand.
            - There are also directions on how to fill out the content for the spreadsheet.
        - Drag and Drop or Upload document from your computer.

- Update Users (bulk edit via upload)
    - Select the three-dot action icon in the top right corner to **Update Users** Via a **Spreadsheet Upload**
        - Select "Update Users"
        - Filter the Users that you want to update, by:
            - School
            - Programs (if enabled)
            - Class
        - Download the file and make your desired changes.
        - Drag and Drop or Upload document from your computer.
    - There is an instructional PDF for download if needed.



- **Reset a User's Password**
    - Locate the user in the User table. You can search or sort to find them faster.
    - Choose **Reset Password** from the Action menu for the user. ~OR~
        - Select the user from the results to access the user's profile information.
        - Scroll to the bottom of the page and click 

    - A text or email will be sent to the user to have them change their password.

Manage School Admin Users

- Select the School Admin from the User list by clicking their name or the **Action** icon.
    - Here, you will be able to see the user's Account Information, Classes Joined/Owned, and Notification Information
    - To Edit the Schools that the School Admin manages, scroll under '**School'** and select the School (s) that you would like for the user to manage.
        - Select **Save**
    - The user will receive an email when their role has been changed.

Manage Student Users

- Select the Student from the User list by clicking their name or the **Action** icon.
    - Here, you will be able to see all of the Classes that the Student is enrolled in, the Student's Goals, Documents uploaded by the student, as well as Student Notes and Assessments

- **To Add a Note to the Student's profile**
  - Navigate to the **NOTES** section of the Student's profile.
  - Select 'Add Note'
  - Add a Title to the Note
  - Add a message to the text box labeled 'Body'.
  - You have the option to upload an attachment (File/Image) by clicking the paperclip icon.
  - Select Public or Private - The default choice is for the Note to be Public.
    - Public - other Instructors and School Admins can view the note.
    - Private – only you will have access to view the note.
  - Click 'Add'

- **Add an Assessment to Student Profile**
  - Navigate to the **ASSESSMENTS** section of the Student's Profile.
  - Select the 'Add Assessment' button, Select Test Name, Level, Overall Score, Overall Result, Test Date, Select Future Test Date, and Add Comments (Optional)
  - Add Detail for Sections of the Test
    - Select ••• next to the test to which you want to add results.
    - Click Edit
    - Add Section Name, Score, Level, Result, and Add Comments (Optional)
    - Click 'Update'

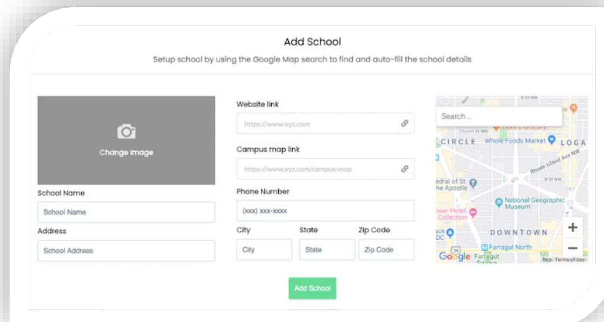
- **To view or edit an Assessment result for a student.**
  - Navigate to the **ASSESSMENTS** section of the Student's Profile.
  - Choose from the list or search by typing in the search bar the name of the test.
  - Select the toggle dropdown to filter your search by test type.
  - Select the test from the list of filtered results by using the **Actions** button.
  - View or edit the details by Select the ••• icon for the test and select 'Edit'.
  - The details of the test will appear.
  - You can make changes to the test and select **Save**

- **To add an attachment to an Assessment result for a student.**
  - Navigate to the **ASSESSMENTS** section of the Student's Profile.
  - Choose from the list or search by typing in the search bar the name of the test.
  - Select the toggle dropdown to filter your search by test type.
  - Select the test from the list of filtered results by using the **Actions** button.
  - View or edit the details by Select the ••• icon for the test and select 'Edit'.
  - The details of the test will appear.
  - Scroll down to the window labeled **Attachments.**
  - Select the ⊕ to select from your mobile gallery or your computer files.
  - Once the file uploads, scroll down and select **Save**

School Setup and Management

Select School in the menu to edit, archive, and add school information for your district.

- To edit or archive a school, select the ••• icon to the right of the name of the school.
    1. Select Edit school to edit school information.
    2. Select Archive to make the school inactive.
- To add a school, select Add School in the top right corner of the page.
    1. Type the school name into the Google Map search bar first, then the other details will auto-fill.
    2. Fill out the remaining form with the preferred information that will display on the website and app.
    3. Upload a school image.



Classes

To **manage classes** for your organization, select Classes from the main menu.

- Search and Sort classes to locate the intended class
    - There is a search bar to quickly locate a class
    - Each column in the table can be sorted alpha-numerically
    - Archived classes are found in the separate ARCHIVED tab
- To <u>**create**</u> a class, navigate to Add Class in the top right corner.
    - Follow the prompts to set the individual class icon, name, class code, school, class owners, set a meeting time that will show up on the class calendar, and if the class is public or private. (private classes cannot be found through searching)
- To <u>**create**</u> multiple classes at once, select the action menu ••• and select **Add Classes**
    - Follow the instructions listed to download the template and enter the data for each class as advised.
    - Upload the file as prompted.
    - You will be notified if there are any required fields that need to be changed.
    - Those classes will then be setup in the system.
- To <u>**bulk edit**</u> classes, select the action menu ••• and select **Update Classes**
    - Filter classes and Download the file
    - Download and follow the instructions PDF

To **View a class**, select the class name or ••• to the right of the class then 

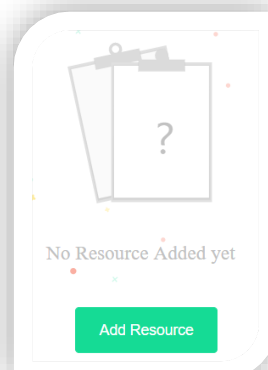
- <u>Messages Tab</u>: You can post class announcements and send messages to students
- <u>People Tab</u>:
    - You can add a class owner by selecting 

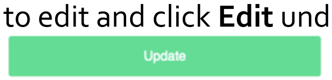
 and selecting the teachers who will act as owners of the class.
    - You can add people to the class by selecting 

 in the top right.
        - First – select from the list of existing users to be added.
    - For adding new users to a class, select the **click here** button on the bottom. Then you have four options:
        - Add users by inputting their full name and email address or phone number.
        - Access a printable PDF to walk users through registration,
        - Display in-person instructions,
        - or acquire a sharable link to be emailed or texted to users.

- Org Admins can also View/Add/Edit/Delete Class Files, Class Calendar Events, and Class Attendance.

Class Resources



- **To Add a class file to Class Resources**, select the class you would like to add a file to
    - Navigate to the **RESOURCE** tab of the class.
    - Select the **Add Resource** button
        - (The image to the right will appear if no resources are posted yet)
    - Click the dropdown and select **FILE** from the options
    - Add a title, description, and upload your file
- **To Add a link to Class Resources**, select the class you would like to add a file to
    - Navigate to the **RESOURCE** tab of the class.
    - Select the **Add Resource** button
    - Click the dropdown and select **LINK** from the options listed.
    - Add a title, description, and paste or type your link into the space provided.
- **To Edit a class resource**, select the preferred class the file is in
    - Select the file you want to edit and click **Edit** under the Actions menu.
    - Make changes and click 

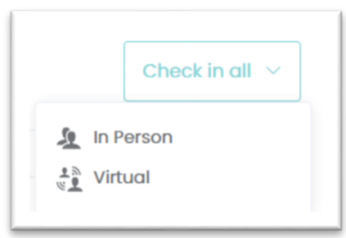
- **To Delete a class resource**, select the preferred class file is in
    - Select the file you want to edit and click **Delete** under the Actions menu.

Class Calendar

- **To Add a Class Calendar event**, select the preferred class:
  - Navigate to the **CALENDAR** tab of the class.
  - Select the day from the calendar that the event will take place.
  - Fill out the form with the details of the event.
  - Select if the event will be recurring or a one-time event.
  - Select if the event will trigger push notifications for those enrolled.
  - Click **Save**
- **To Edit a Class Calendar event**, select the preferred class:
  - Navigate to the **CALENDAR** tab of the class.
  - Select the event from the calendar that you want to edit.
  - Select the in the top right corner.
  - Make changes to the event and click **Save.**
- **To Delete a Class Calendar event**, select the preferred class:
  - Select the event from the calendar you want to delete.
  - Select the in the top right corner.
  - You will receive a confirmation that the event is deleted

Class Attendance

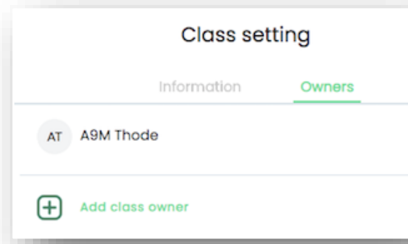
- The Org Admin can view and edit the attendance records for any class.
- Select the **Attendance** Tab
- Use the search box and date range filter to locate the class meeting to view/edit.
- Click the Meeting Name to view the attendance record (or use the Action menu)
  - You can check in all the people in the class at once by using **Check in All.**
    - Select either **In Person** or **Virtual** to fit the attendance type.
  - Or change the **attendance type** for one person at a time
  - Enter or Edit the **Check in** and **Check out** times.
  - The **Total Time** column is read-only and displays the total minutes the student is in the class.
  - Add Notes for each person.



- You can add a drop-in student who is present but not a member of the class.
  - Click the + Add new student button and then search registered students to add.
- Click **Save** once the edit is complete.
- **Save and Lock** prevents students from editing their attendance records. A teacher or admin can unlock a class if necessary.

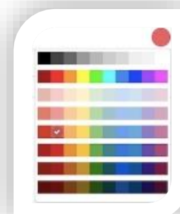
Class Settings

- Edit class information by selecting the Settings Tab.
  - Here you can edit the class name, class code, icon, add a description, add class owners, and/or make it a private or public class.
  - Once you have completed making your changes, select **Save.**
  - You can select Remove from class list to archive the class and remove it.
  - To Add a Class owner, select Add class owner to add an owner from the teachers who have joined the class:
    - If the teacher has not yet joined, click on Add them and add a new user to the app.



Calendar

To add events to the academic calendar, select Calendar from the menu.

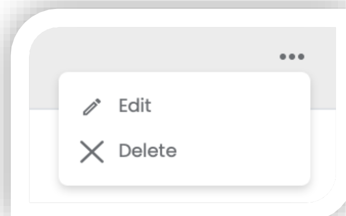


1. **First option**: Locate and click on the date for which you want to add an event.
   a. Complete the form – by first entering the Title and selecting an event color by clicking the color circle next to the Title.
   b. For the location, select either a school or "Other."
      i. If Other, then specify other location.
   c. Confirm the date and set the start and end times.
   d. You can add an attachment to the event by clicking the paper clip icon -
   e. Enable Notification to send alerts for the event. (defaults to on position)
   f. Select Save after the form is complete.
2. Second option: select Add in the top right corner and complete the form.
3. Click on a calendar event to view more details.
   a. To edit the event, select on the top right corner of the pop-up.
   b. To delete the event, select in the top right corner of the pop-up.

Additional Resources

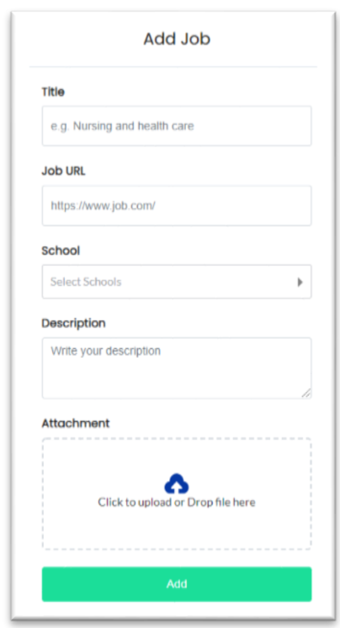
Select Additional Resources to add or edit additional resources for teachers or students.

- You can add resources by selecting the Add button on the top of the page.
  - Enter the Title, URL (link), and Description of the resource
  - You can add links in the description of the resources.
  - Designate the role that the resource will be available for
    - You can select either Teacher alone or Teacher and Student.
  - Attachment: Click to upload a file or drag and drop the preferred file into the window.
  - Select Add
- To edit a resource, select ••• to the right of the resource and select Edit
  - Make necessary edits and select Update
- To delete a resource, select ••• to the right of the resource and select Delete



Job Board

To add or edit job postings, select Job Board on the main menu.



- To create a job posting, select Add Job on the top right corner of the screen.
  1. Enter the Title and URL (link) for the job posting.
  2. Select All, a selection, or just one School from the list.
  3. Enter a Description for the job posting.
     - The description can include additional links.
  4. Attachment: Click to upload a file or drag and drop the preferred file into the window.
  5. Select Add
- To edit or delete a job in the job board, select the ••• to the right of the posting.
  - To **Edit** a job posting, select Edit to edit posting information.
  - To **Delete** a job posting, select Delete Job to delete the posting from the board.