

PD Playlist Creation Guide

Primary Audience: District Administrator, PD Playlist Moderator, PD Playlist Curator, PD Playlist Credit Approver

Purpose of Document: This guide outlines the steps for accessing and utilizing Professional Development (PD) Playlist

PD Playlist Roles: These roles support the creation, management, and operation of PD playlists.

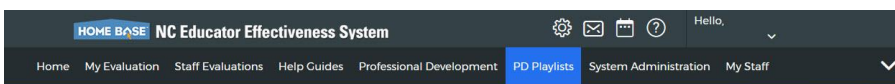
- **PD Playlist Moderator** - This role is responsible for creating and managing PD playlists. Functions include adding participants and courses, managing notifications, and moderating the discussion.
- **PD Playlist Curator** - This role has the ability to add or remove participants for the selected PD playlist to which they are assigned. All other functions will be read only.
- **PD Playlist Credit Approver** - This role is responsible for reviewing and approving PD playlists credit requests. This role has the ability to give final approval so the PD playlist becomes visible in the catalog. This role also has the ability to return the PD playlist to the PD Playlist Moderator if changes need to be made.
- **PD Playlist Participant** - This role represents the learner. Anyone who has been assigned to a PD playlist will assume the role of PD Playlist Participant. Functions include viewing courses, participating in discussions, and adding fellow participants.

PD Playlist Creation

NOTE: NCDPI must first set up the Moderator role for each district's designated staff PD lead.

NCDPI must also add Curators and Credit approvers for playlist creators to use the Add Curator/Add Moderator functions.

- 1) Select the PD Playlists tab.

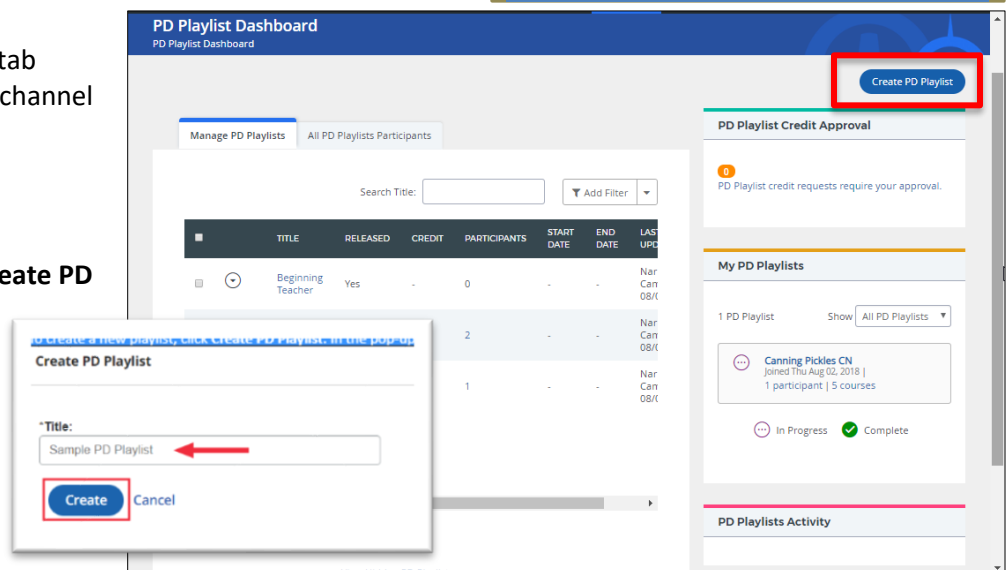


- 2) The PD Playlist Dashboard displays.

- a) Managing My Playlists tab
- b) All My Playlist Participants tab
- c) PD Playlist Credit Approval channel
- d) My PD Playlists channel
- e) PD Playlist Activity channel
- f) View Hidden Playlists link

- 3) To create a new playlist, click **Create PD Playlist**.

- a) In the pop-up window, enter the **Title*** (required)
- b) then click Create.
 - i) Set PD Details



PD Playlist role for Moderator, Curator and Credit Approver

- Must first be set by NCDPI
- To make this request designated staff should open a Remedy Support Ticket with staff certified name, location and PD playlist role.

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PD Playlist Details

1) On the **Details** tab

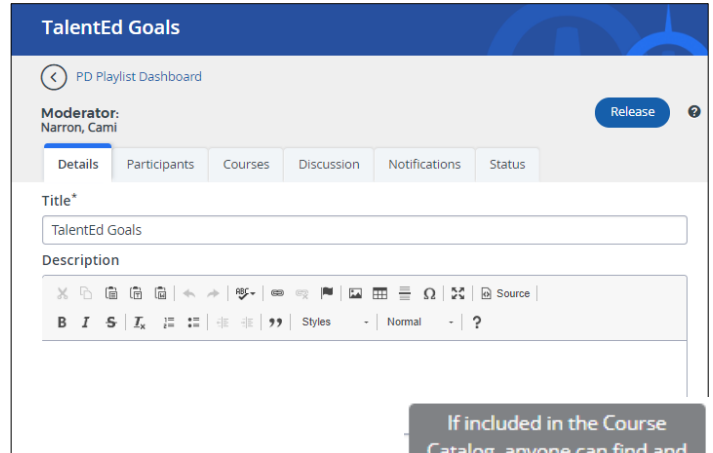
- Title can be edited.
- Enter a description.

2) Optionally select **Start** and **End Dates**.

- If credit is assigned to the playlist, participants must complete all required courses by the end date in to receive credit.

Start Date
mm/dd/yyyy

End Date
mm/dd/yyyy



If included in the Course Catalog, anyone can find and join this PD Playlist.

If not included in the course catalog, the participants will need to be manually added.

3) Select **Include in Course Catalog** to allow anyone to find and join the PD playlist. *Otherwise, participants must be added manually by the PD Playlist Moderator or other participants.*

- When enabled, control when participants can join the playlist using one of two settings.
 - Allow participants to join starting on date** - Select the first date a PD Playlist Participant can join this playlist. Using this setting allows release of a playlist into the catalog before participants can join.
 - Do not allow participants to join** - Select this option to never allow a PD Playlist participant to join this playlist. Using this setting allows a playlist in the catalog that may have an alternate registration process.

Course Catalog Inclusion

☒ Include in Course Catalog ?

☐ Allow participants to join starting on date: mm/dd/yyyy

☐ Do not allow participants to join (participants must be added manually)

4) Select **Enable Certificate** to issue a certificate to the PD Playlist participant upon completion of the playlist.

- This is outside of certificates issued to participant's **Transcript** by course completions.

Certificate

☐ Enable Certificate

5) To add additional **PD Playlist Moderators**, click **Add Moderator**.

- NOTE:** NCDPI will have to add All moderators before they will show up in this list.
- The **Add Moderator** window will open
 - search or apply filters to find the desired user.
 - Check the box for the user to add and select **Add Moderator(s)**.

Moderators

☐ ☐ ☐

Add Moderator

6) To add a **PD Playlist Curator**, click Add Curator.

- NOTE:** NCDPI will have to add All moderators before they will show up in this list.
- The **Add Curator** window will open
 - search or apply filters to find the desired user.
 - Check the box for the user to add and select **Add Curator(s)**.

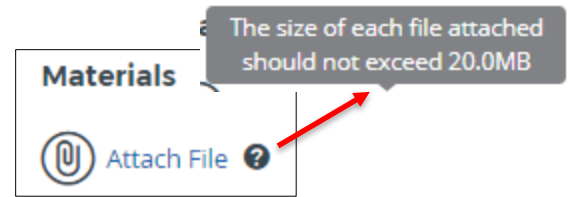
Curators

Add Curator

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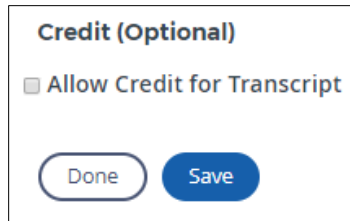
7) Click the **Attach File** button to attach files, such as agendas, to the playlist.

- Attached files can be viewed by all PD playlist participants.
 - File size limit of 20 MB.
 - Remove a file by clicking the trash can icon.

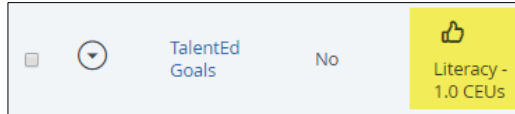


8) For participants to receive transcript credit for completing the **PD playlist**, select the checkbox.

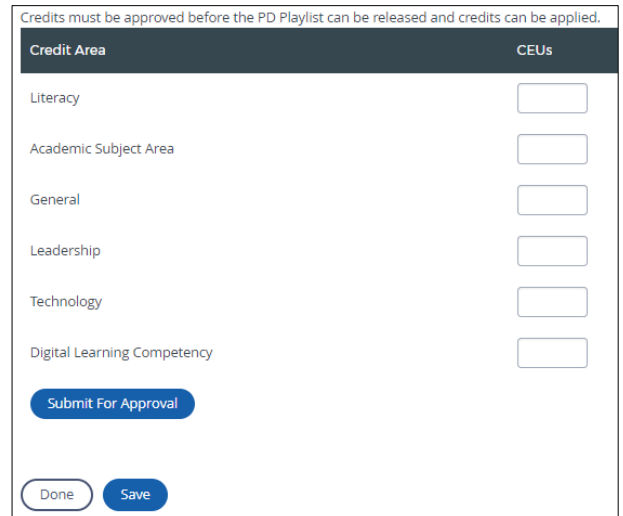
- Enter the desired number of credits in the appropriate box.
- Click **Submit for Approval**. The credit type is not editable after submitting for approval. If there is not a **Credit Approver**, the Moderator's approval of the credit type I will be marked by a thumb's up icon. This will also be noted on the main dashboard.



c) **Confirm** request.



d) Click back on course title if needed to continue editing playlist.



9) At the bottom of the screen, click **Save** to save the **PD playlist** and keep working or click **Done** to save the **PD playlist** and return to the dashboard.

PD Playlist Participants

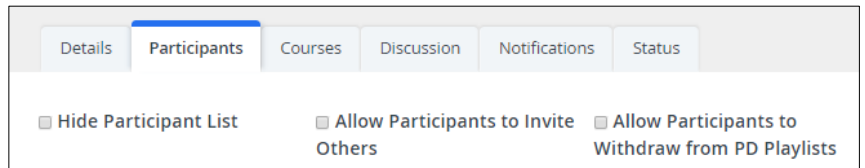
Each PD playlist will have a group of cohorts assigned as participants.

1) Select the **Participants** tab.

- Existing participants are displayed in a sortable list.

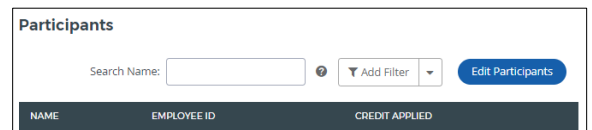
2) Determine participant options.

- Select **Hide Participant List** to disable the view of participant list by other participants.
- Select **Allow Participants to Invite Others** to enable participants to add other users to this PD playlist. (This option is disabled if Hide Participant List is selected.)
- Select **Allow Participants to Withdraw from PD Playlist** to enable participants to withdraw themselves from this playlist.



3) Click **Edit Participants** to add participants.

- Dynamically
- Manually



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Add Participants with Dynamic Rules

Add participants by creating Dynamic Rules or adding a staff group. To do this, follow these steps:

- 1) Click **Add Criteria** and select the option to Add Dynamic Rule.
- 2) **Edit/ Create Rules** in the modal by selecting the desired fields by checking the boxes. Each field selected will open a list of specific criteria.

Add Criteria ▾

Add Dynamic Rule

Add Staff Group

Note:

Select more than one field at a time to create a multi-faceted dynamic rule.

- a) Select the specific criteria by checking the appropriate boxes.
- 3) Check the box next to **Include Inactive Users** to allow inactive users to display.
 - a) Click **Add** once finished making selections.
 - 4) Click the drop down in the box and set it to either **include** or **exclude**.

Current Staff Position: Instructional

Include ▾

Include

Exclude



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Add Staff Group with Dynamic Rules

- 1) Click **Add Criteria** and select the option to **Add Staff Group**.
- 2) Click the **+** icon for the desired staff group(s) and each will be added automatically.
 - a) Use the search box and filter options to narrow down the available staff groups.
 - b) After selecting groups, close the modal by clicking the **x**.

Add Criteria

Add Dynamic Rule

Add Staff Group

- 3) Click the drop down in the box and set it to either **Include** or **Exclude**.

Dynamic Rule(s) Add Criteria

Late Hire IT Facilitator + Include Exclude

Current Staff Position: Instructional + Include Exclude

Add Staff Group					
Search Name:		▼ Add Filter			
ACTIONS	NAME	DESCRIPTION	CURRENT MEMBERS	CREATED BY	LAST UPDATED
+	Late Hire Library Media Coord	—	1	Administrator, TrueNorth	—

- 4) The resulting list of participants in the table below will match these rules.

INCLUDED (135868)	NAME	EMPLOYEE ID	SITE(S)	DEMOGRAPHICS	EXCLUDED (0)
<input checked="" type="checkbox"/>	teacher2, test	test.teacher2	Training School 1	Licensure Cycle Year 1 Show More...	<input type="checkbox"/>

- 5) Click the **trash icon** to delete the rule.

Late Hire IT Facilitator

Include Exclude + trash icon

Add Users Manually

Add users manually by selecting individual users or using the Advanced Options to look up specific users based on selected criteria. To do this, follow these steps:

- 1) Click **Add Members** and select the option to **Add User**.

Manually Add Users to the Member List Add Members

Add User
Add User Advance...


- 2) Select individual users by selecting the check box next to their name or check the box at the top of the column to select all the users on that page.

- 3) Use the search box or the filters to narrow down the available results.

Add Users			
Search Name:		▼ Add Filter	
<input type="checkbox"/>	NAME	EMPLOYEE ID	TITLE
<input checked="" type="checkbox"/>	000049-Train, Principal1	10000000491	Administrative
<input type="checkbox"/>	000049-Train, Teacher1	10000000492	Instructional
<input type="checkbox"/>	000092-Train, Teacher2	10000000923	Instructional
Add Cancel			

- 4) After selecting all users, click **Add**.

- a) Users will be added to the participant list and a **Link icon** will indicate manually added users.

<input checked="" type="checkbox"/>		000049-Train, Principal1
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Add Users Advanced

- 1) Click **Add Members**
 - a) Select the option to **Add User Advanced**.
- 2) Select the type of identifiers, the type of separator, and input the specific identifier(s).
 - a) Copy and paste the identifiers into the box provided.
- 3) Click **Next** to generate the list of users associated to the identifiers provided
 - a) select the desired users by checking the box.
- 4) Click **Prev** to navigate to the previous screen or click **Next** to add the users.
 - a) View number of users added.
 - b) Navigate back to the Inputs tab to begin again with a different identifier.
- 5) Click **Done** once when finished.

Additional Options

- Click **Clear all manual and overrides** at the bottom of the table to remove all users who were added manually.
- Select the radio buttons in the **Include/ Exclude** columns of the table to include or exclude a specific user.
- Use the **Search Name** box and/ or **Add Filter** options to narrow down the list of added participants.
- Download CSV file.

Note:

Select more than one field at a time to create a multi-faceted dynamic rule.

Download CSV					
Search Name: <input type="text"/> ? ▼ Add Filter ▼					
INCLUDED (1)	NAME ▲	EMPLOYEE ID	SITE(S)	DEMOGRAPHICS	EXCLUDED (0)
<input checked="" type="checkbox"/>	000049-Train, Principal1	10000000491	Training School 1 000049-Train	Administrative Show More...	<input type="checkbox"/>
1 results					
Availability changed or added as individuals. Participants will not be automatically updated when populations change.				Clear all manual and overrides	

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Selecting Courses for the Playlist

Courses can be made required or optional for PD playlist participants.

Complete the 2 required and 2 of the 4 elective courses.

COURSE	SECTION	SECTION TIME	SECTION LOCATION	STATUS
	Elective			
** Test Copy	Required			
** Test Copy (Copy)	Elective			
Florida Writes	Elective			
#Regression Test Course 0126 (Copy 2)	Required	41081	April 12, 2017 - April 26, 2017 12:00 AM - 12:00 AM	
Florida Writes	Elective	3786	Today - Today	online

☐ Instructor Led
 ☐ Self Paced
 ☐ Not Started
 ☐ In Progress
 ☒ Complete

Required course (indicated by red dashed arrows pointing to Required courses)

Elective course (indicated by yellow dashed arrows pointing to Elective courses)

- 1) Select the **Courses** tab.
 - a) Existing courses are displayed in a sortable list.
- 2) To enable participants to add courses to this PD playlist, select **Allow Participants to Add Courses**.
 - a) Courses added by participants will be added as optional.
- 3) Click **Add Courses**.
 - a) Use the **search box** or **filters** to locate the names of the desired courses.
 - b) Select the **checkbox** for the courses to add.
 - c) At the bottom of the screen, click **Add** to continue to add courses.
 - d) When finished adding courses, click **Done**. Screen returns to the playlist.
- 4) Select the **course type** in the course list.
 - a) Select **Required** for any course to make it required for the participants.
 - i) If credit is applied to the PD playlist, participants must complete the required courses to receive credit.
 - b) Select **Elective** for any course which is not required.
 - i) In the drop down below the course list, select the number of elective courses a participant must complete.
 - c) In the **type** column review the type of course.
 - d) To remove a course selection, click the **X** icon.
 - i) To remove all courses at once, click **Remove All**.

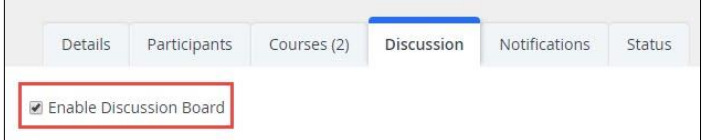
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Discussion

PD Playlist Moderator has the option of turning the discussion off for each playlist.

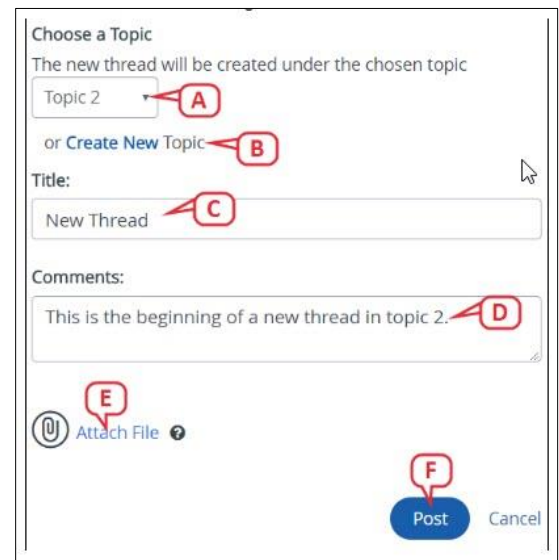
Discussion is enabled (checkbox selected) by default.

- 1) If discussion is enabled for PD playlist, select the **Discussion** tab at any time to moderate.
- 2) The discussion board includes the following features.
 - a) **Manage Topics** - Choose between viewing threads for all or specific discussion topics. (Moderators also will have the option to manage topics.)
 - b) **Narrow Results**
 - i) Search
 - ii) Filter
 - (1) Contain my posts
 - (2) Contain attachments
 - (3) Follow
 - iii) Sort existing threads.
 - (1) Oldest
 - (2) Newest
 - c) **Discussion Threads** – Area to interact with existing threads.
 - d) **Create New Thread** - Start a new discussion thread.




Create New Discussion Thread

- 1) Click **Create New Thread** to begin.
 - a) Select a **discussion topic** for thread from the list of existing topics.
 - b) If enabled by the Moderator, click **Create New** to create a new discussion topic for the thread.
 - i) In the pop-up, enter the **new topic title**, then click **Create**.
 - (1) The new topic can now be selected.
 - c) Optionally enter a **Title** for the thread.
 - d) Enter the content of the thread in **Comments**.
 - e) Click **Attach File** to add an external file to the thread
 - i) Up to 20 MB file size.
 - f) Click **Post** to add thread to the discussion board.

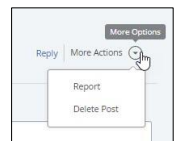
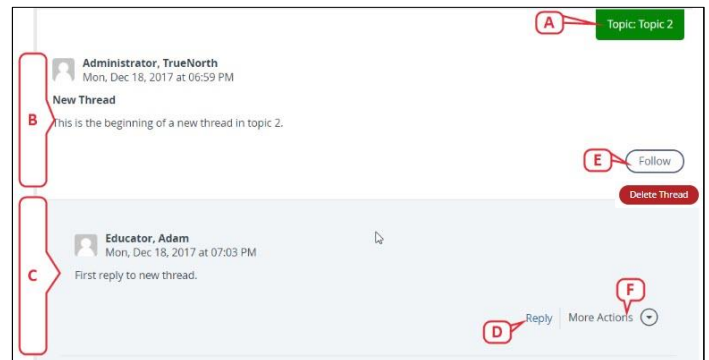
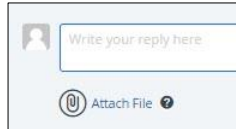


Interact with an Existing Thread

- 1) Discussion threads already in progress have the following features and options.
 - a) The thread **Topic** is displayed in the upper-right corner.
 - b) The original thread post is displayed at the first level.
 - c) Posted replies to the thread are displayed indented, as second and third levels.

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- d) Post a reply to the original post or to a direct reply of the original post.
 - i) Click **Attach File** to add an external file to the discussion up to 20 MB file size.
 - ii) Click **Reply** to add a discussion contribution and make it viewable to others.
- e) Click **Follow** or **Delete**
 - (1) Follow to find topic easily
 - (2) Moderators can delete a thread.
- f) Click **More Actions** to report any post that is deemed inappropriate.
 - i) The Moderator will be alerted to review the post.
 - ii) Moderators also have the option to **delete** a post from this action menu.



Manage Topics (Moderators Only)

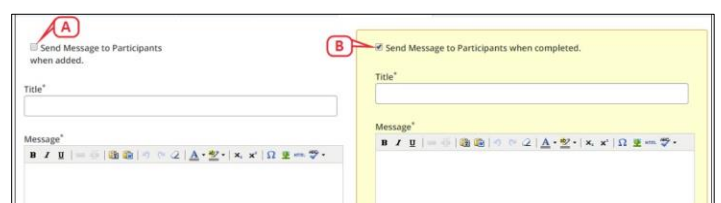
- 1) Click **Manage Topics** to begin.
 - a) Determine whether participants can create new topics:
 - i) Select **On** to enable it.
 - b) Click **Create New Topic** to add a topic.
 - i) In the pop-up, enter the new topic title, then click **Create**.
 - c) Make existing topics **active (On)** or **inactive (Off)** using the toggle.
 - i) Participants will not be able to select inactive topics for new threads.
 - d) Access additional options from the **Actions** menu.
 - i) **Rename** - change the topic title
 - ii) **Move Content** - move all threads under this topic to another topic
 - iii) **Archive** - move the topic and any threads beneath it to an archive state
 - iv) **Delete** - remove the topic and any threads beneath it from the discussion board
 - e) Click **Done** when changes are complete.



Notifications

PD Playlist offers the option to send messages to participants.

- 1) Select the Notifications tab.
- 2) Messages can be configured for two trigger events.
 - a) When a participant is added to the playlist.
 - b) When a participant completes the playlist.



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3) Select the corresponding checkbox to activate a notification. Selections will be highlighted.

4) Each message can be delivered via email, targeted announcement, or both.

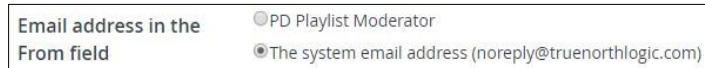
5) Messages delivered via email can appear to be sent from the default system email address or the Moderator's email address.



Delivery Method

- Targeted Announcement
- Targeted Announcement**
- Email and Targeted Announcement
- Email

6) Select **Save** when message configuration is complete.



Email address in the From field

- ☐ PD Playlist Moderator
- ☒ The system email address (noreply@truenorthlogic.com)




Save

Status

Each PD playlist includes an overview of each participant's status in each course in the PD playlist.

1) Select the Status tab.

- An asterisk indicates a required course.
- Course in progress is a circle with three dots.
- Course not started is a circle with a dash.
- Course complete is a circle with a check mark.

* = Required  Not Started  In Progress  Complete

Release the PD Playlist

The playlist cannot be viewed by participants until it is released.

- Once all information for the PD playlist has been completed, click **Release** in the upper-right corner.
 - A prompt will appear to confirm this action.
 - Click **Release** again.
 - The **PD Playlists Dashboard** will return.



Sample PD Playlist

Moderator:
Administrator,
TrueNorth

Release

Note:

The Release button will be disabled if the PD playlist is awaiting approval for credit.