



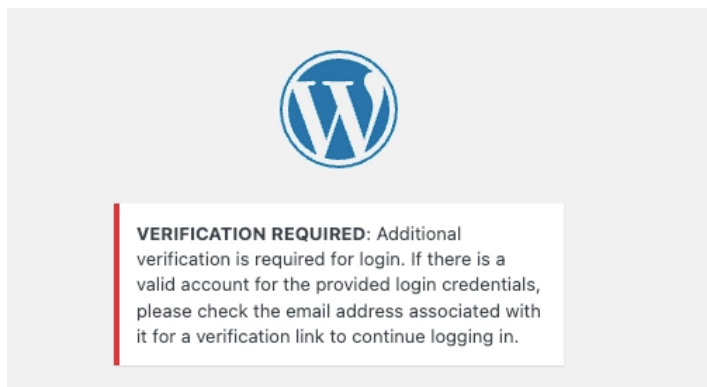
## Lead Organiser & Team Leaders User Guide

### 1. Go to Login Page

Access the login page by navigating to: <https://thisissignsource.com/course-login-page/>

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### 2. Verify Login



When logging in, you will be prompted for verification.

- You will receive an email instantly for verification. If you do not receive it, check
  - You input correct password
  - your **junk folder**
  - **or contact your IT department** as emails can sometimes be blocked.
- Once verified, log back in. You will be sent to organisation dashboard

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### 3. Go to Organizational Dashboard

Once logged in you should be automatically – however if you were logged in previously and on another page please Navigate to the organizational dashboard to manage settings and view information.

<https://thisissignsource.com/organisation-dashboard/>



The screenshot shows the 'Organisation Dashboard' for 'ZCM Digital'. At the top, it displays 'Organization: ZCM Digital' and a 'Change Organization:' dropdown menu. Below this, there's a summary bar showing 'Total Seats Used: 0' and 'Seats Remaining: 50', along with 'Manage Organization >' and 'Email >' buttons. A table lists the team 'zoe' with '0' members. Under the table, there are buttons for 'Team Members >', 'Team Leaders >', and 'Courses >'. Below the table is an 'Organization Report' section with a search bar containing 'zoe' and an 'Export CSV >' button.

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### 4. Lead Organiser Only

**If you are a Team Leader, please skip to Section 5.**

#### 4.1 Manage Teams

As a Lead Organizer, you can create and manage Teams. Team Leaders cannot access this section.

*Delete a Team:*

1. Go to the "Manage Team" tab.
2. Click the trash can icon next to the Team you wish to delete.
3. Confirm your decision in the dialogue box.

*Add a Team:*

1. Navigate to Manage Organization > Add Team.
2. Enter the Team name.

3. To create a new Team Leader, input their First and Last name, Username, Email, and Password.
  - o Alternatively, if the Team Leader already exists, check the "Team Leader already exists?" checkbox and select them from the list.
4. Select the course(s) for the Team and move them to the "Active Courses" box using the arrow.
5. Click Save.

## 4.2 Manage Courses

This section allows you to assign or remove courses for Teams.

*To Add Course(s) to a Team:*

1. Select the course(s) from the left column.
2. Use the right arrow to move them to the "Active Courses" window.
3. Click "Update Profile" to save changes.

*To Remove Course(s) from a Team:*

1. Select the course(s) from the "Active Courses" window on the right.
2. Use the left arrow to remove them.
3. Click Save.

The screenshot shows a web interface titled "MANAGE COURSES". It is divided into two main sections: "Available Courses" on the left and "Active Courses" on the right. Both sections have a search bar with the placeholder text "Search for names...". Under "Available Courses", there is a dropdown menu currently showing "WordPress Basic Tutorial". Under "Active Courses", there is a dropdown menu showing "E-Commerce Course" and "HTML5/CSS3 Essentials". Between the two columns, there are two circular arrows: a right-pointing arrow on top and a left-pointing arrow on the bottom. At the bottom right of the interface, there is a teal "Save" button with a right-pointing arrow.

## 4.3 Manage Team Leaders

Add or remove Team Leaders, or assign a Team Leader as both a Team Leader and a Team member. This is useful if the Team Leader also needs to take the courses.

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## 5. Team Leaders

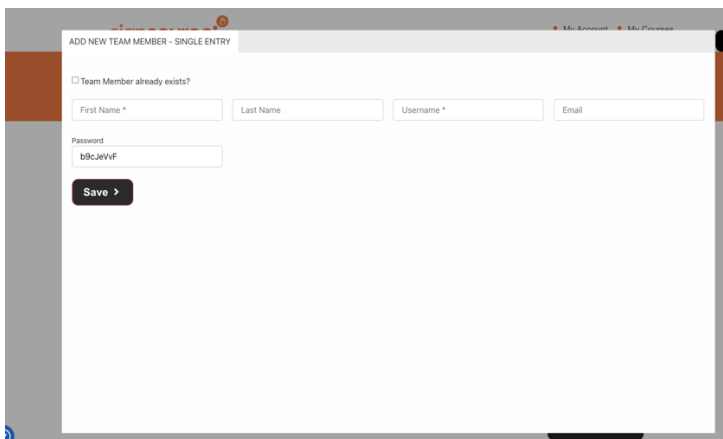
Team Leaders can manage individual Teams, including adding members, viewing assignments, running reports, and emailing Team members.

### 5.1 Managing a Team

Access and manage your Team by clicking "Manage Team" on the dashboard.

*Add Team Members:*

1. Go to "Add Team Members."
2. Enter the Team member's First Name, Last Name, Email, Username, and Password.
3. If the Team member already exists in the system, check the "Team member already exists?" box and search for their details.
4. Click Save.



The screenshot shows a web form titled "ADD NEW TEAM MEMBER - SINGLE ENTRY". At the top left, there is a checkbox labeled "Team Member already exists?". Below this are four input fields: "First Name \*", "Last Name", "Username \*", and "Email". Underneath these is a "Password" field containing the text "b9cJeVf". At the bottom left of the form is a dark button labeled "Save >". The form is set against a light gray background with a dark gray sidebar on the left.

**Once user been added they will receive email user name and password a link to course login page and user guide page link**

*Import List:*

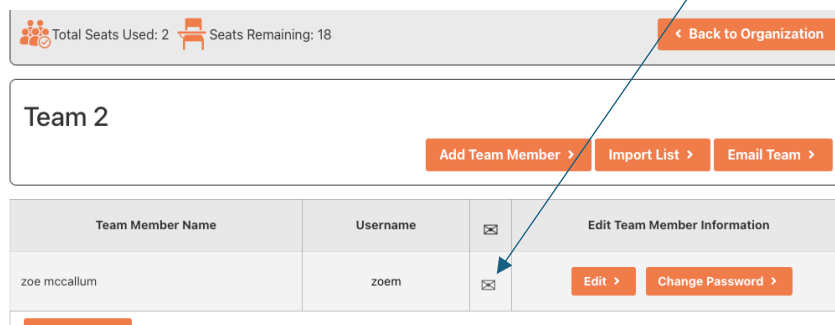
1. Click "Import."
2. Download the CSV template by clicking "Download CSV Template."
3. Fill out the CSV file with the required details.
4. Under "Upload File," click "Browse," select the completed template, and click Open.
5. Click Save.

## Email Team

- Click "Email Team" to send a broadcast email or set a welcome email for Team members.
- Use the message board shortcode [learndash\_groups\_plus\_message\_board] on any page to display broadcast messages for Team members.

### Email a Specific Team Member:

1. Click the email icon next to the member's name.
2. Compose and send the email directly.



## Edit Team Member Information

1. Click "Edit" next to a Team member's name.
2. Update their details or delete them from the Team.
  - Note: You can restrict the ability to delete/edit Team members if desired.

### Change Password:

1. Click "Change Password" next to the Team member's name.
2. Enter and confirm the new password.

### Export CSV:

1. Click "Export CSV" to download the Team's report.

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## Organization Report

The Lead Organizer can view and manage grades for the entire organization.

- Access the "Organization Report" to see each Team and their average percentage grades for each course.
- Drill down to view individual Team member grades.

- Click "Export CSV" to download the organization's entire report.