



**JOB AID** 

INTEGRATED TECHNOLOGY DIVISION SAN DIEGO UNIFIED SCHOOL DISTRICT



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Professional Learning is a tool for managing your Professional Development activities, including searching for available courses, registering for training, and viewing your transcript.

### **Getting Started**

**Log-in:** In your web browser, go to: <a href="https://sandiegounified.truenorthlogic.com/U/P/Tab/Home">https://sandiegounified.truenorthlogic.com/U/P/Tab/Home</a>

If you are already logged into a computer within the San Diego Unified network, the Professional Learning portal will automatically recognize your employee ID and password and take you directly to the Home Page.

If you are accessing the Professional Learning website from home, you will need to sign-in using your Employee ID and network password, in a similar manner to accessing your district email account from home.



Access to this webpage requires an Employee or Student ID. Forgot your password? Try the Password Self Service or contact the IT Help Desk

Employee or S	tudent ID	
Password		

Sign in



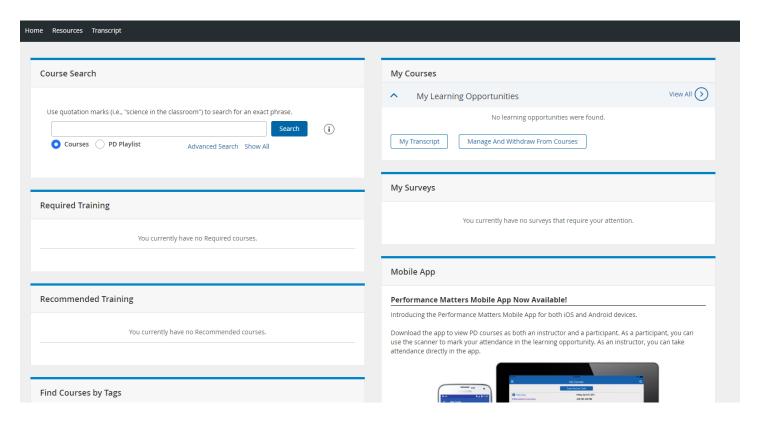
#### **Home Page**

The menu at the top left-hand side of the page is determined by your user-access level.



**Home**: Upon logging in you will be immediately taken to the Home page for access to:

- Search for Courses
- View Required Trainings
- View Recommended Trainings
- View your Registered Courses
- Complete Course Surveys
- Find information on the Mobile App



**Resources**: Help resources such as instructional aids and videos.

**Transcript**: The Transcript page displays a record of all your Completed courses.

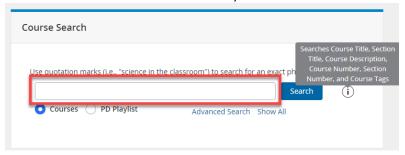
Refer to the **View Transcript** section for details.



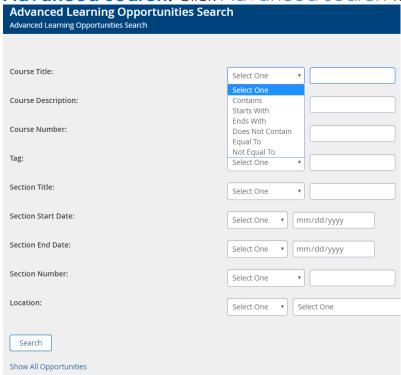
#### Course Search

The Course Search functions are located on the homepage:

Course Search: Enter a keyword, title, course #, section # or description. Click Search



Advanced Search: Click Advanced Search to conduct a more detailed search.



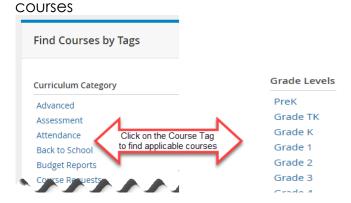
Show All: Click Show All to display all available courses

Searching using any of the above methods will return a list of courses matching the search criteria which have future sections scheduled. It only displays the courses which are accessible to you based on your site location and job role.





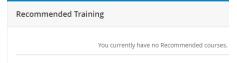
Find Courses by Tags: Click on the Curriculum Category or Grade Level to find related



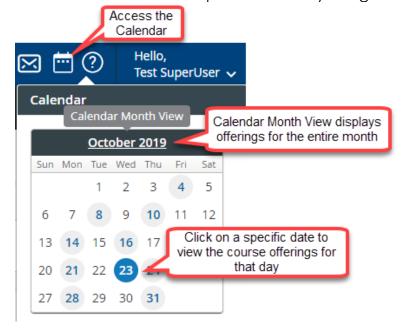
Required Training: Required Trainings assigned to you are displayed

Required Training	
How to bake a cake	

Recommended Training: Recommended Trainings targeted to you are displayed



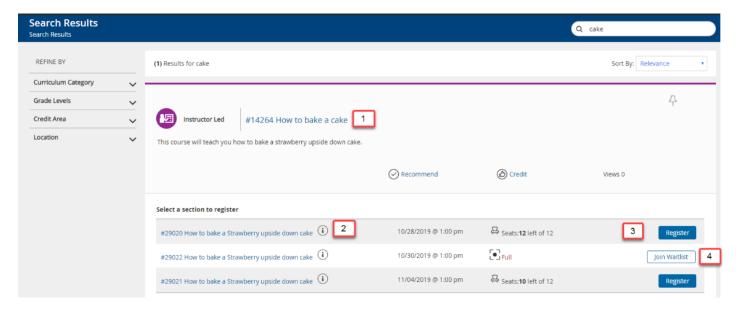
**Search by Calendar:** The calendar is found at the top right corner of the screen. Search for courses offered on a specific date by using the calendar, or click on the month view.



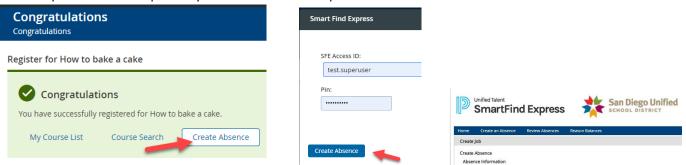


#### Register for a Course

Once you have located the desired course using the Search functions on the Home page, you may view the Course and Section details.



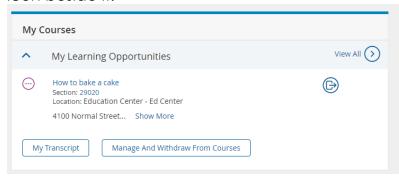
- Uiew the Course Details, including its Description, Prerequisites, File Attachments & Notes
- <sup>2</sup> View the Section Details, including the Date/Time, Location, Instructor, Attachments and Notes
- Click on the Register button next to the section you wish to register for. Confirm your selection by clicking Next The confirmation page will display and an email confirmation will be sent.
- \*\*For Certificated staff requiring a sub\*\* The <u>Create Absence</u> button will direct you to Smart Find Express to complete your absence request.



If a desired Section is FULL and a waitlist is available, click Join Waitlist to be put on the waitlist



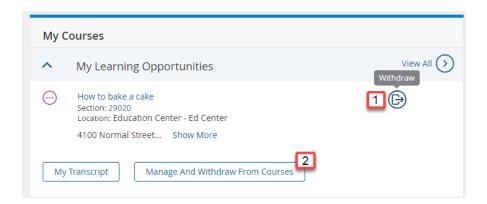
On the Home page, Registered Courses will appear in the My Courses channel with the  $^{\odot}$  icon beside it.



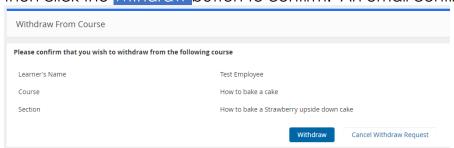


#### Withdraw from a Course

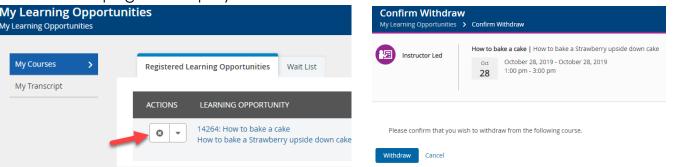
There are two available methods to Withdraw from a Course.



From the My Courses channel, click the **Withdraw** icon to the right of the course title, then click the Withdraw button to confirm. An email confirmation will be sent.



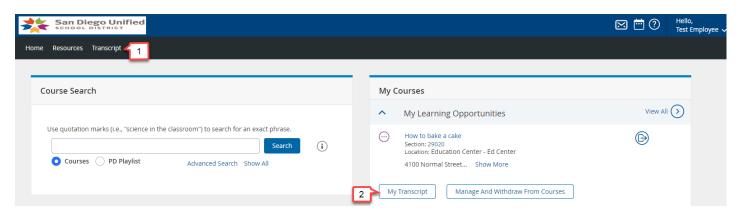
Alternatively, click the Manage and Withdraw From Courses button, click the under the Actions menu to Withdraw, then click the Withdraw button to confirm. The confirmation page will display and an email confirmation will be sent.





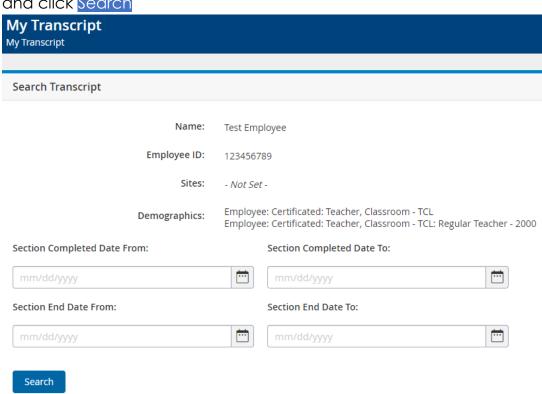
#### **View Transcript**

To view your Transcript information of completed courses, there two options:



- Click the Transcript tab on the main menu
- You may also click the My Transcript button within the My Courses channel.

Either option directs you to the Search Transcript page. Enter your optional search criteria and click Search





Immediately below the Search window, you will find your Transcript information:



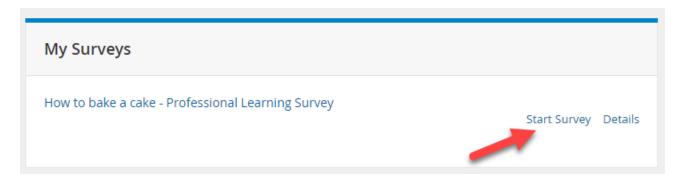
You may click on your Certificate number to view your Certificate of Completion:



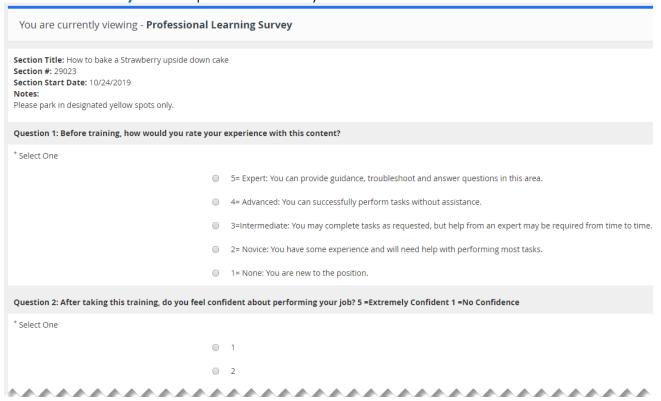


#### **Course Surveys**

Navigate to the **My Surveys** channel on the Home page. If a Completed course was setup to request a Survey it will be displayed here. An email reminder may be sent.



#### Click Start Survey to complete the survey.



Once all of the required \* questions have been answered, click bottom of the page.

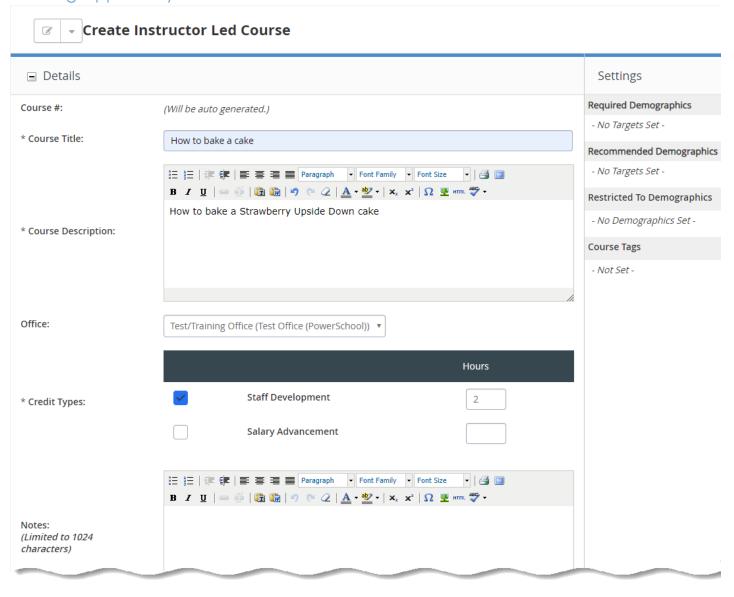
Record & Return to Menu at the



#### **Course Creation**

Course Creation is restricted to users who have been granted an Office Administrator role within Professional Learning. An Office signifies the department or site offering the course. Office Admins may create a course only for the office(s) to which they have been granted access.

Navigate to the Administration tab > Select Course Administration > Select Create New Learning Opportunity > Select Instructor Led Course.



Enter the required fields: Course Title, Description and Credit Type/Hours. If you have been granted access to multiple Offices, please ensure the correct option is selected from the dropdown list.



Optionally, select any **Required Prerequisites**, communicate any **Recommended Prerequisites**, attach **Files**, assign a **Course Survey** and choose whether or not to **Allow participants to enroll in multiple sections** of this course.

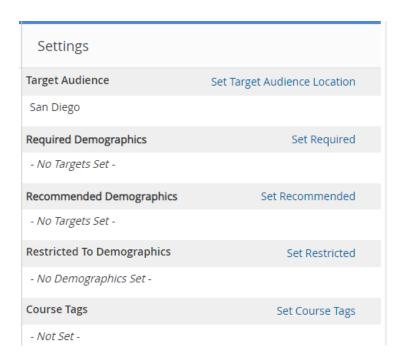
Enforced Prerequisites:	- No Choices Available -	Add
Recommended Prerequisites:		6
File Attachments	(III) Attach File (2)	
Course Survey:	- <b>v</b>	
Allow participant to enroll in multiple sections of same course:		
Archived:		
* Required		
Create Instructor Led Cour	se Save Draft Cancel	

Click Create Instructor Led Course, then navigate to **Settings** on the right side of the screen.



#### **Course Settings**

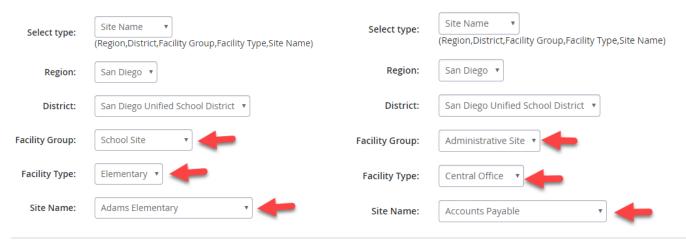
Course Settings define which users will be able to view and register for courses.



**Target Audience** determines which users will be able to Find/View a course in the Course Search. *Only users in the specified locations will have the ability to view the course.* 

Target Audience defaults to the broadest level, Region = **San Diego**, which includes all active SDUSD employees, as well as Non-District Employees such as Charter school personnel and Guest Instructors.

To restrict visibility of your course to a lower level, you may select a specific Facility Group, Facility Type or a specific School Site/Administrative Department:

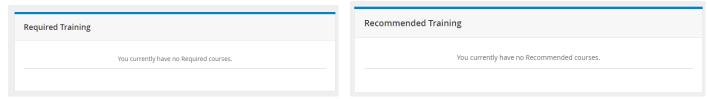




#### **Setting Demographics:**

Demographic settings are optional. This feature may be used to **Require**, **Recommend** or **Restrict** a course to a subset of users based on their job role.

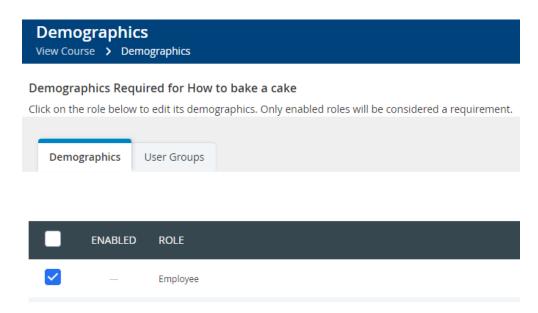
The Home page displays sections for Required Trainings and Recommended Trainings.



These are controlled by the Course Settings.



To set a Course as **Required** for a specific Demographic, click Set Required. To **Recommend** a course to a specific demographic, click Set Recommended. To set a course as Required (or Recommended) for ALL employees, simply check the box next to Employee and click **Enable** at the bottom of the screen.



At this level, the course will be set as Required (or Recommended) for **ALL** employees, as seen on the Home page.

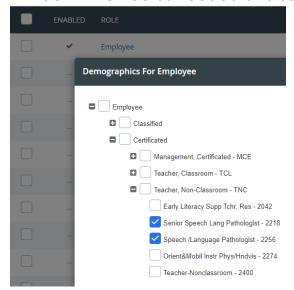


Required Training
How to bake a cake

To set the demographics to a more restrictive level, once you have enabled Employee, go back and click on its link.



Drill down the tree as needed and select the desired group(s) and/or specific job codes.



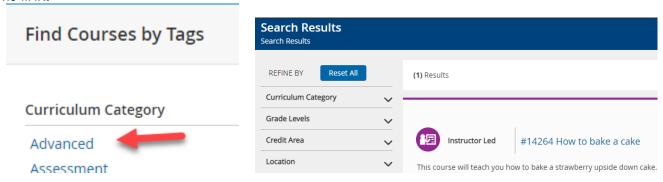
**Restricted To Demographics** allows you to filter specific demographic groups or job roles using the same tree as seen above. Using this feature will restrict the visibility of a course, similar to Target Audience, but based on demographic criteria rather than site location.

Restricted To Demographics Set Restricted
- No Demographics Set -

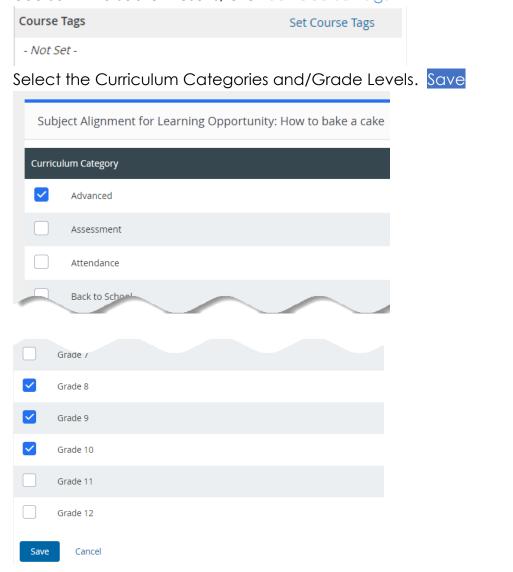


### **Setting Course Tags:**

The Home page contains a channel for users to Search by Course Tag simply by clicking on its link.



This is helpful when browsing for course offerings in a specific category. To include your course in the search results, click Set Course Tags

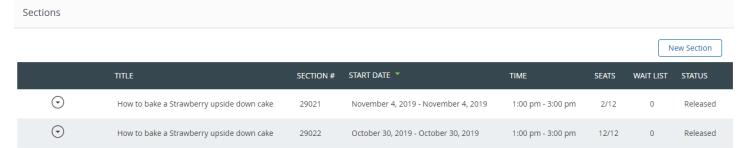


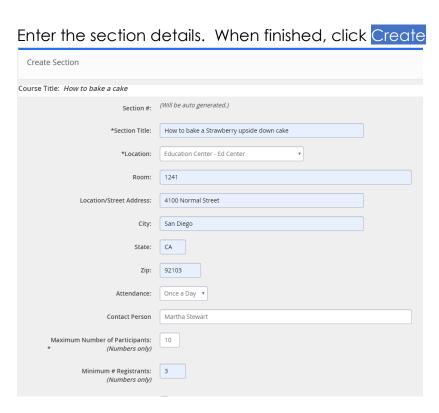


#### **Section Creation**

Once you have completed the Course creation process, next you must schedule a Section to define the details such as the meeting time, location, etc. Please note, a course will not be visible in the course catalog unless there is a Section scheduled for a present or future date.

To schedule a Section, scroll down to the bottom of the Manage Instructor Led Course page and click New Section







*Section Title:	Section Number is auto-generated, therefore you may want to consider a standard naming convention for Section Title within your department's offerings.	
*Location:	The Location field contains a drop down list of the most commonly used locations. If your location does not exist in the list, select <b>Other</b> .	
Room, Location,	Enter the complete address so the registrants will be able to use the	
Street Address:	Map feature.	
Attendance:	Choose to take attendance Once a Day or Twice a Day, the default is Once.	
Contact Person:	Enter the contact details for the Course Coordinator, the Instructor or both.	
*Maximum		
Number of	Once this value is reached, the course will display as FULL	
Participants:		
Minimum #		
Registrants:	The minimum # registrants required to hold the training	
Allow Waitlist:	Enable if you wish to offer a waitlist	
Maximum	Enter a numeric value if you choose Allow Waitlist	
waitlist size:	Line a nomene value il you choose Allow Maillist	
*Section Start	Enter the section start date	
Date:	Linoi ino Jodnott Statt dato	
*Section End	Enter the section end date	
Date:	Line hie section and date	
*End of		
Registration	Enter the desired date	
Date:		
Minimum	If the Minimum # Registrants value is not reached by this date, the course will be automatically cancelled and email notifications will be sent.	
Registrants		
Deadline:		
Waitlist cutoff Date:	Enter the desired date	
Classtime Default (Start Time):	Enter the default start time of the section **	



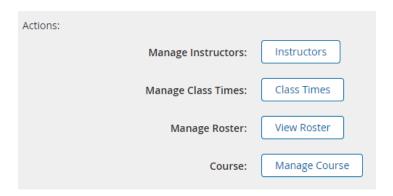
Classtime Default (End Time):	Enter the default end time of the section **
Release Section Now:	Enabled by default. The section will be available to accept registrants immediately upon creation.
Release Section At:	If you do not want to release the section immediately, set a date for its release.
Instructor:	Instructor is assigned after the section has been created, under Manage Sections.
Allow Creation of SFE Absence:	Enabled by default. This provides optional quick access to SmartFindExpress (formerly SAMS), which is the tool used by the district to request a substitute as required by the registrant's job role.
Absence Reason:	Please select the only available option "26 Professional Development". This reason code is used by SFE and will default as the employee creates their absence/sub request.
Budget Code:	This field is specific to SFE absences and does not apply to SDUSD at this time. If you wish to communicate a budget code, please use the Notes section.
Notes:	Enter in any section specific notes such as where to park, what to bring, etc.
File Attachments:	Size limitation is 20MB per file.

<sup>\*\*</sup>Please note, you still must navigate to Manage Section to set class times once you have created the section.

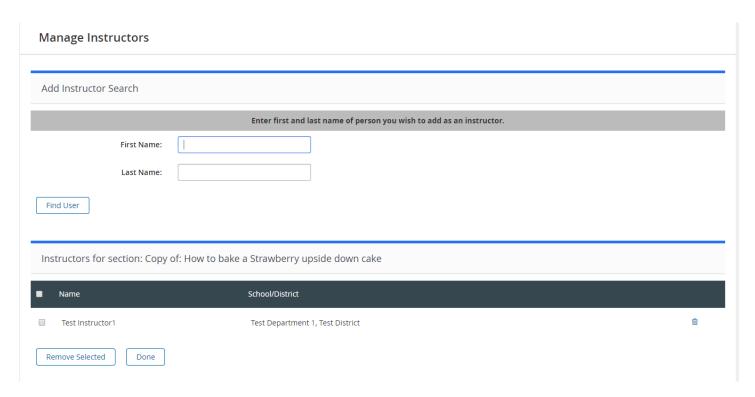


### **Manage Sections**

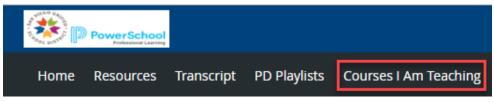
Once a Section has been created, from the Manage Section page, scroll down to Actions to complete the process.



Manage Instructors: Click Instructors to search for the Instructor by name and Add User.



The Instructor will be able to view the course information from the menu tab Courses I am Teaching.

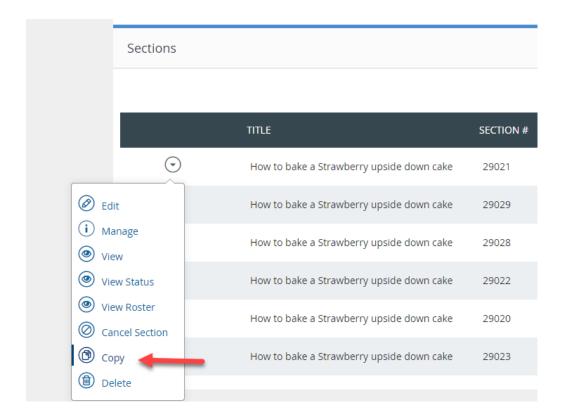




Manage Class Times: Click Class Times. Click Add a New Class Time. This will default the value previously entered in the Section setup. If this single section's class time spans over multiple dates, clicking the button again will add the following day. Dates can be manually updated.



\*\*Important: This process schedules the class times for **one** single section of a course. If you wish to offer multiple sections, you must create multiple sections by navigating back to Sections, and either click **New Section** and repeating the above process, or choose **Copy** and modify only the necessary fields.



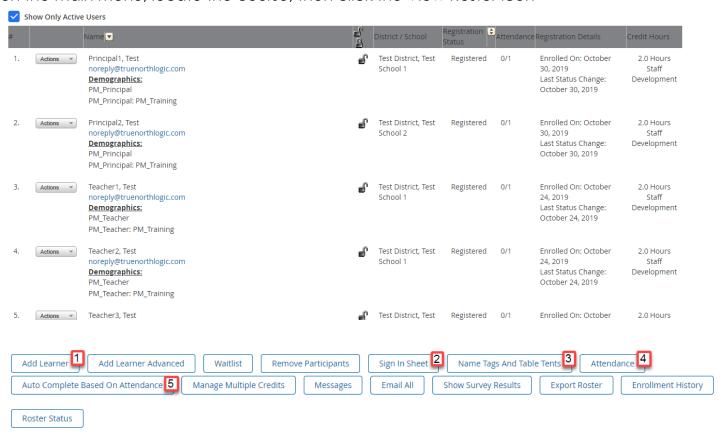


#### **Manage Roster**

The section roster gives the instructor the ability to complete various tasks for a section such as attendance and roster modifications.

Manage Roster can be accessed from Administration > Course Administration > Search > Click on the Course name, Scroll down to Sections > Click on the arrow  $\odot$  to View Roster.

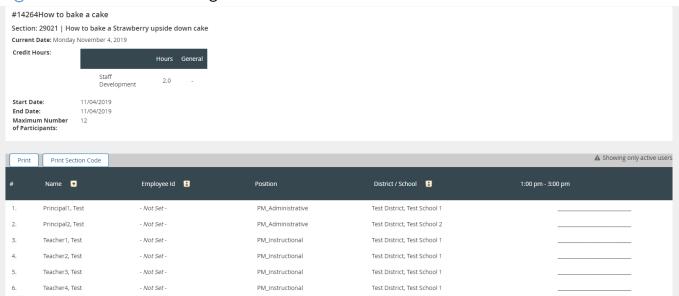
Alternatively, the Instructor may also access the roster from the Courses I am Teaching tab on the main menu, locate the course, then click the View Roster icon



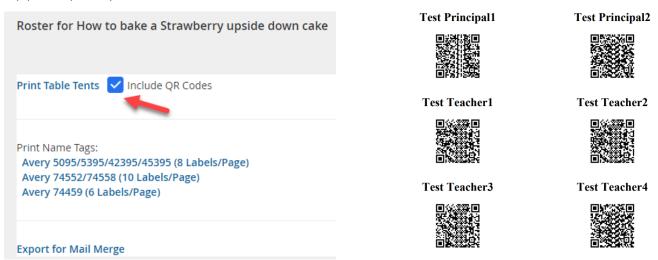
Add Learner - Add attendees to the section – search based on location, demographics, or registrants of other courses



#### Sign In Sheet - Print the sign in sheet

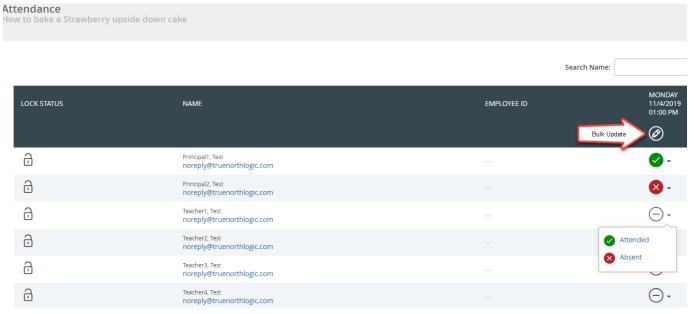


Name Tags and Table Tents - Include the QR codes and use the Performance Matters App to quickly scan to take attendance.

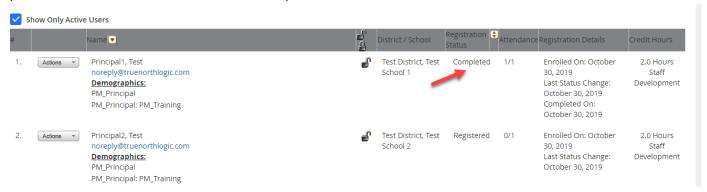




Attendance - The Attendance page is another method to take attendance. You may mark attendance individually, or enter a Bulk Update. Using Bulk Update, it is typically recommended to set all registrants to Attended, then go back and manually set the Absentees.



Auto Complete Based on Attendance – After recording attendance, the final step is to update the Attendees status to Completed.



\*\*Important: The Completion step MUST be performed in order for the attendee to be able to view the course in their Transcript and obtain a Course Completion Certificate.

#### Transcript view:





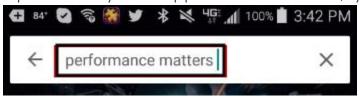
#### **Mobile App**

The mobile app is a helpful tool which will allow you to view your courses and display your unique QR code for attendance.

Install, Register, Log In

### Install the App on Android Devices

1. Open the Play Store app. In the search bar, type performance matters.

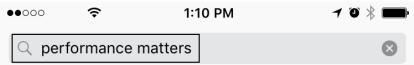


2. Tap on the Performance Matters app, then tap Install.

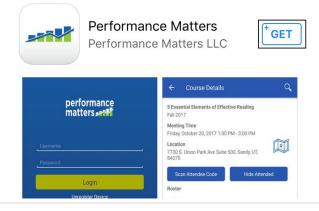


### Install the App on Apple Devices

1. Open the App Store app. In the search bar, type performance matters.



2. For the Performance Matter app, tap Get, then tap Install.





### Register the App

1. Tap on the Performance Matters app icon to open it.



2. Enter the San Diego Unified district access code **9SaDWm** and click Register.



### Log Into the App

1. Tap on the Performance Matters app icon to open it.



2. Enter your Employee ID as your username and your network password, then tap Login.





### Use the App as a Course Participant

**View Your Courses** 

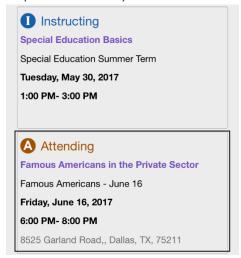
1. Tap on the Performance Matters mobile app icon to open it.



2. Course sections that you are attending and/or instructing will be displayed. If your section has multiple class times, there will be a listing for each class time.

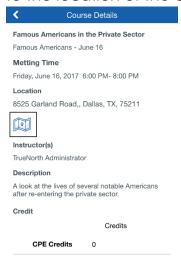


3. Tap on a class you are attending to view its details.





4. The class details are displayed. Click on the map icon to open your mobile device's map tool to the location of the class.



### Display Your QR Code for Attendance

A QR code is generated for you as a participant of courses within your portal. The instructors of your sections can scan your participant QR code to mark your attendance.

1. In the Performance Matters mobile app, tap the menu icon on the My Courses screen.



2. Select Display My Code.



My Code

3. Your QR code will display for the instructor to scan.





#### Scan a Section QR Code for Attendance

An instructor can generate a QR code that you can scan to mark yourself as attended.

1. In the Performance Matters mobile app, tap Scan Section Code on the My Courses screen.



2. The QR scanner will appear. Scan the QR code from the instructor.



3. The pop-up confirms that you are checked in for the class time and marked as attended. Tap OK to return to the app.



### Use the App as Course Instructor

#### **View Your Courses**

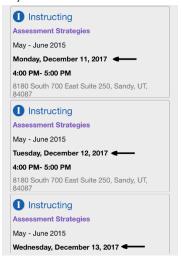
1. Tap on the Performance Matters mobile app icon to open it.



2. Course sections that you are instructing and/or attending will be displayed.

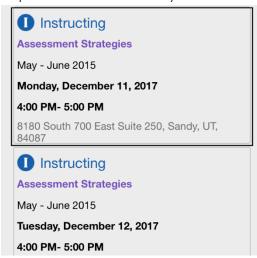


3. If your section has multiple class times, there will be a listing for each class time.

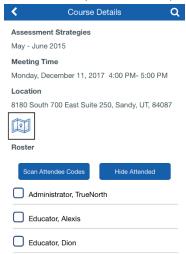




4. Tap on the class time you would like to access.



5. The class time information is listed at the top with the roster information at the bottom. Click on the map icon to open your mobile device's map tool to the location of the section.





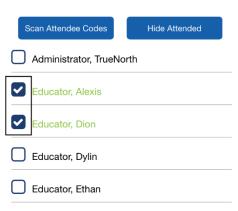
#### Take Attendance

#### Via the App Roster

1. Scroll to the Roster area of the screen. Tap the checkboxes to mark participants as attended for the class time.

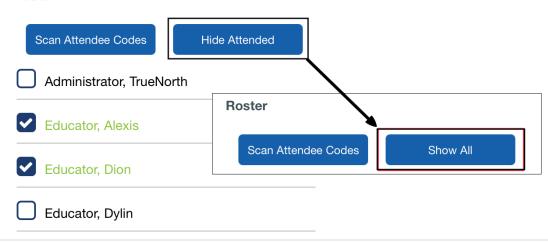
Roster			
S	Scan Attendee Codes	Hide Attended	
	Administrator, TrueNo	orth	
	Educator, Alexis		
	Educator, Dion		
	Educator, Dylin		
	Educator, Ethan		

2. A checkmark will indicate that the participant has been marked as attended. Tapping on the checkmark will change the participant's attendance back to absent.



3. For easier viewing, click Hide Attended to remove the participants which have been marked as attended. Click Show All to view them again.

#### Roster



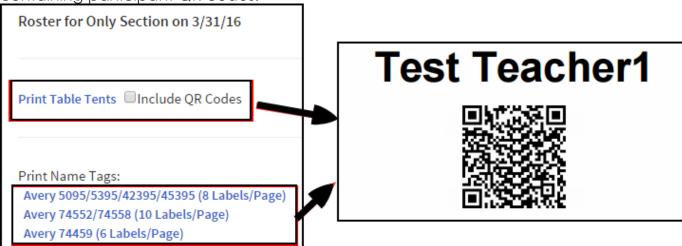


#### Via Participant QR Codes

Use the mobile app QR code scanner to scan the participants' QR codes from name tags, table tents, or their app.

A participant QR code can be made available to you for scanning in one of two ways:

1. Prior to class time, you access your section roster to print either name tags or table tents containing participant QR codes.



### 📝 Note:

If you are using table tents, make sure to select Include QR Codes.

Refer to <u>Name Tags</u> for more detailed instructions on managing your section roster and creating name tags and table tents.

2. If the participant has the Performance Matters mobile app, they can display a digital copy of their QR code to you.





2. In the Roster area, tap Scan Attendee Codes.

#### Roster

Scan Attendee Codes

Hide Attended

3. The QR scanner will appear. Scan the QR code from the participant's name tag or table tent upon check-in at the beginning of class time. Or scan the participant's QR code from his/her mobile app screen.



- 4. The pop-up window confirms that attendance has been recorded. Click Revert (mark as unattended) to cancel this selection.
- 5. Repeat the process for each participant.

#### **Via Section QR Code**

You may also print a QR code for your section that participants can scan using their app to mark themselves as attended. Prior to class time, access your section roster to create a signin sheet.

**Note:** Refer to <u>Sign-In Sheet</u> for more detailed instructions on managing your section roster and creating a sign-in sheet.

A sign-in sheet with the QR code will generate for the class time. Print and post this in the room before your class time. Participants can use their mobile app to scan and mark themselves as attended.

08:00:00 AM - 03:00:00 PM

