



RISE Up Platform

SITE ADMINISTRATOR USER GUIDE

Release date: August 14, 2023

NRF FOUNDATION
RISE UP

Site Administrator User Guide

Table of Contents

Roles and Capabilities
Getting Started
Financial Set Up
Creating and Removing Other Administrators for Your Organization
Purchasing Licenses and Materials
Pricing Licenses and Materials (Creating Quotes)
Purchasing Licenses and Materials from a Saved Quote
Paying an Invoice
Allocating Licenses
    To allocate multiple licenses:
    To allocate specific licenses:
Assigning Licenses to Students
    To assign a specific license to a student:
    To assign a student to a program (license):
Withdrawing Licenses
Adding Teachers to Your Site
Adding Students
    To add a single student:
    To add a group of students at once:
Connecting Students to a Teacher
Viewing License Information
Editing Account Details and Viewing Order History
Signing Up as an In-person Proctor
Proctoring an Exam
Reporting an Exam Violation
Requesting Accommodations for Students

Roles and Capabilities

	Group Administrator	Site Administrator	Teacher
Register for a new account	●		
Purchase RISE Up licenses and materials	●	●	
Get quotes for future orders	●	●	
Grant (allocate) licenses to third-party organizations and teachers			
Allocate licenses to affiliated sites	●		
Allocate licenses to affiliated teachers	●	●	
Assign courses and exams to students	●	●	●
Assign students to a site	●		
Assign students to a teacher	●	●	
Withdraw unused licenses	●	●	●
Set up partner sites	●		
Set up teacher accounts	●	●	
Set up student accounts individually or in batches	●	●	●
Manage your personal information	●	●	●
Change your password	●	●	●
Manage your organization's information	●	●	
View information about your associated groups		●	●
View information about your associated sites	●		●
View information about your associated teachers	●	●	
View information about your students	●	●	●

	Group Administrator	Site Administrator	Teacher
Request accommodations for students	●	●	●
Apply to be an in-person proctor	●	●	●
Proctor in-person exams	●	●	●
See outstanding invoices	●	●	
See your order history and past receipts	●	●	
See saved quotes	●	●	
Contact Customer Support to…	• Add additional administrators to your group or your sites • Make changes to sites and teachers	• Add additional administrators to your site	

Getting Started

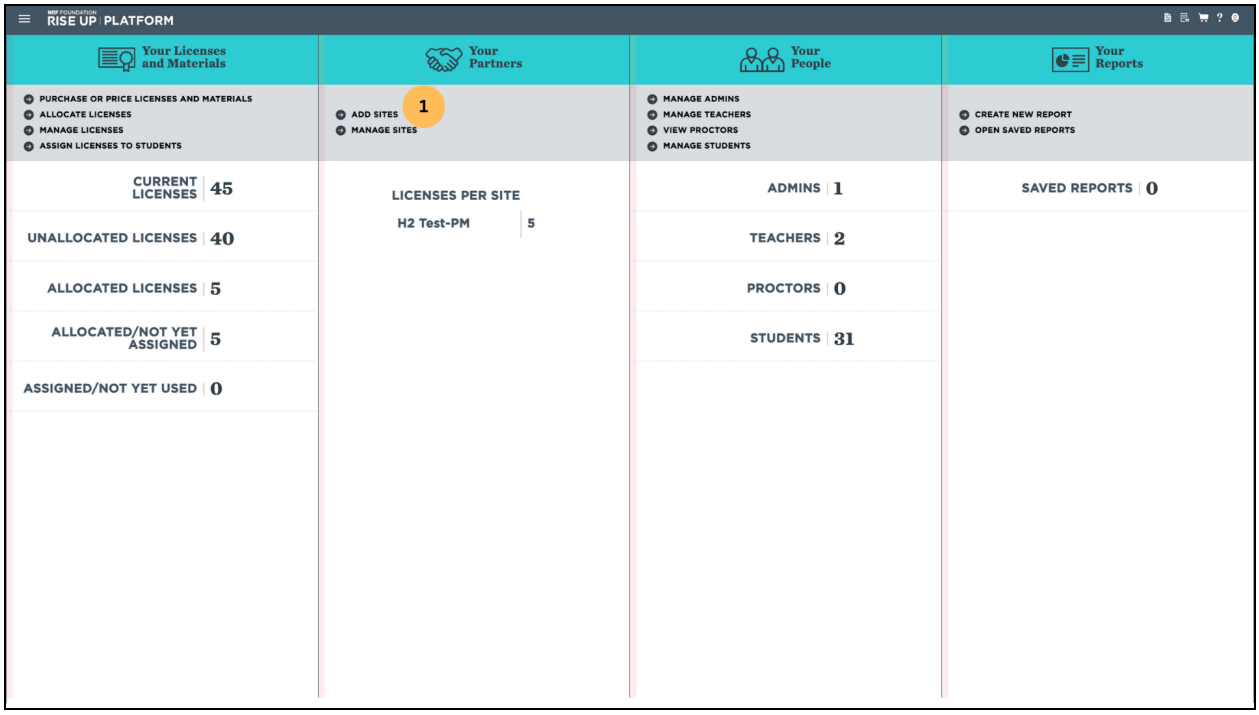
To get started as a site, you have to be added by your organization (your “group”) first. For example, if you are a school, usually a school district is your organization, or if you are a store, usually your organization is your retailer. Once you are added by your organization, they can allocate licenses to you so you could allocate licenses to your teachers or assign them directly to your students.

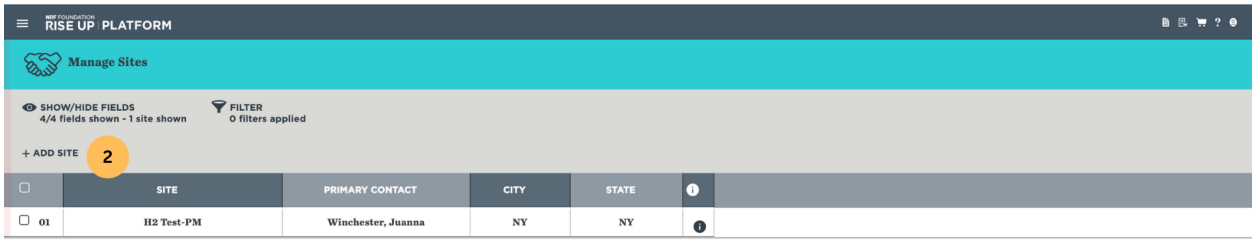
If you don’t have your organization, then you have to register as a group first and then add yourself as a site.

The following are the steps to add a new site as a group administrator:

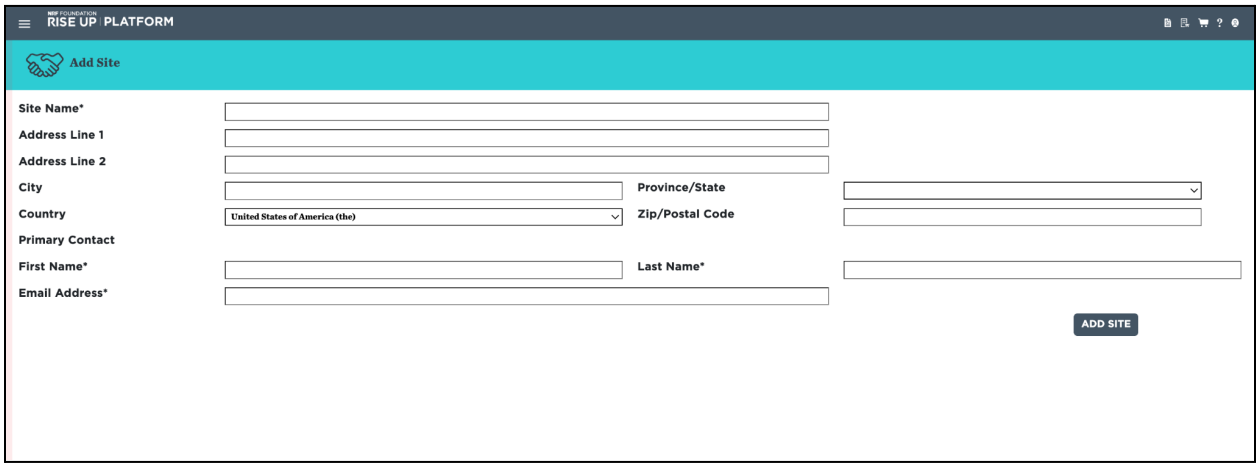
Before you add a new site, you might want to check to make sure it isn’t already part of your group. To see a list of all the sites connected to your group, open the Manage Sites page from the dashboard or from the menu in the upper-left corner.

1. Click **ADD SITES** on the dashboard or on the Manage Sites page, or select it from the menu in the upper-left corner.





2. Add the details for the site you want to add.



3. Click **ADD SITE**. You will be able to allocate licenses and assign students to the new site immediately. The contact you listed will receive an email with a link to complete the registration process.

The following are the steps to complete your registration process and get started as a site administrator:

1. Once the site is added, you (the Site Administrator) will receive an email with a password-setting link to complete the registration process.



Dear Amy:

You've been added as a user to NRF Foundation RISE Up, our industry-backed training and credentialing program.

Here are a few tips, tricks and tools to help you get started:

First, your email is your username for the platform. **Click here** to set up your password.

Once you've done that, **log in** to the RISE Up platform. Please note that Chrome is the preferred browser to use for the platform.

For a personalized introduction, sign up for one of our **introductory webinars.**

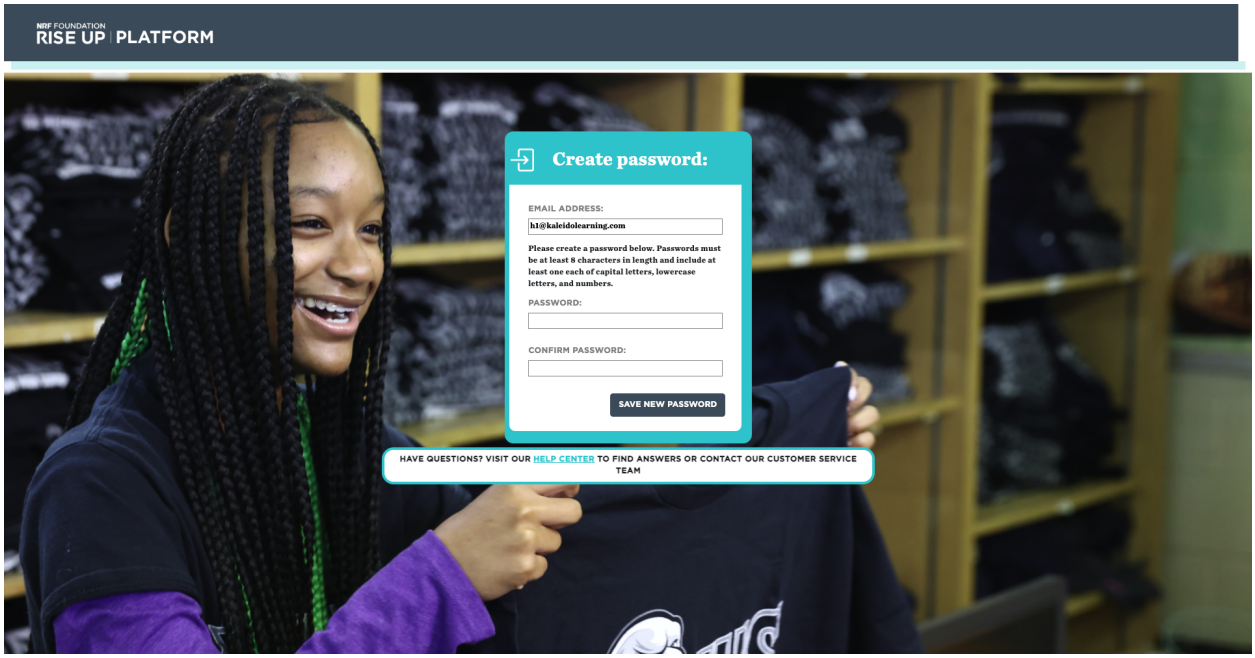
If there's something you need, please visit our **Help Center**, which includes information on getting started, other information, and access to our customer support team. We're ready to help.

Thanks for choosing the NRF Foundation RISE Up training and credentialing program, which provides foundational employability skills to help your students land jobs and get promoted in retail and beyond.

Best Regards,

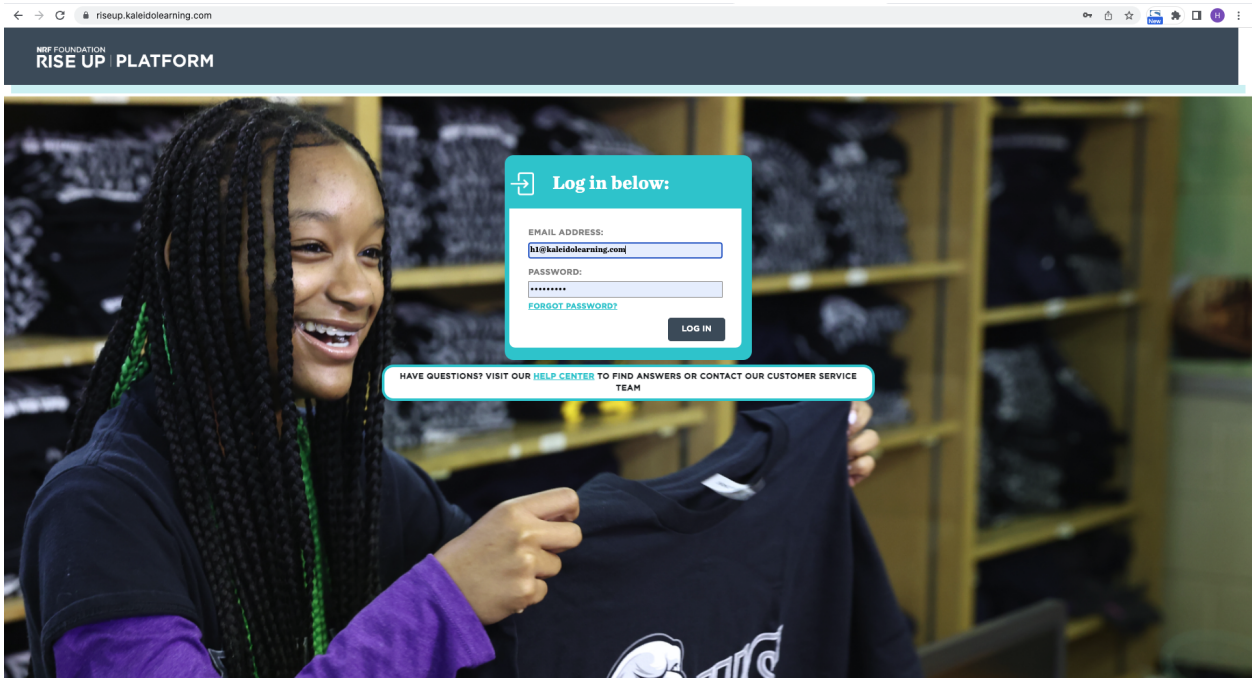
The RISE Up Team

2. Follow the instructions provided in the email to complete the registration process. You will be prompted to set a password during this step.



3. After setting the password, go to the RISE Up platform's logging-in page: https://riseup.kaleidolearning.com/.

4. Log in with your email address and your password.



Financial Set Up

The new RISE Up Platform is a new platform that is not affiliated with the previous platform, Penn Foster. As such, your organization may need financial details for our company in order to set us up and authorize us as a vendor for purchases. Two commonly requested documents are included below, but If you have any additional financial questions or requirements for your organization, please send your email to mailto:Riseupaccounting@kaleidolearning.com.

1. **Sole Source Letter**: This letter is to confirm that Kaleidoscope is the sole authorized vendor and sole supplier of the NRF Foundation RISE Up credentials. So purchases are made directly from Kaleidoscope Learning.
   If you need a copy of our Sole Source Letter, please click Sole Source Letter to download it.
2. **W-9 Form:** Provides Taxpayer Identification Number and Certification.
   If you need a copy of our W-9 form, please click W-9 form to download it.

Creating and Removing Other Administrators for Your Organization

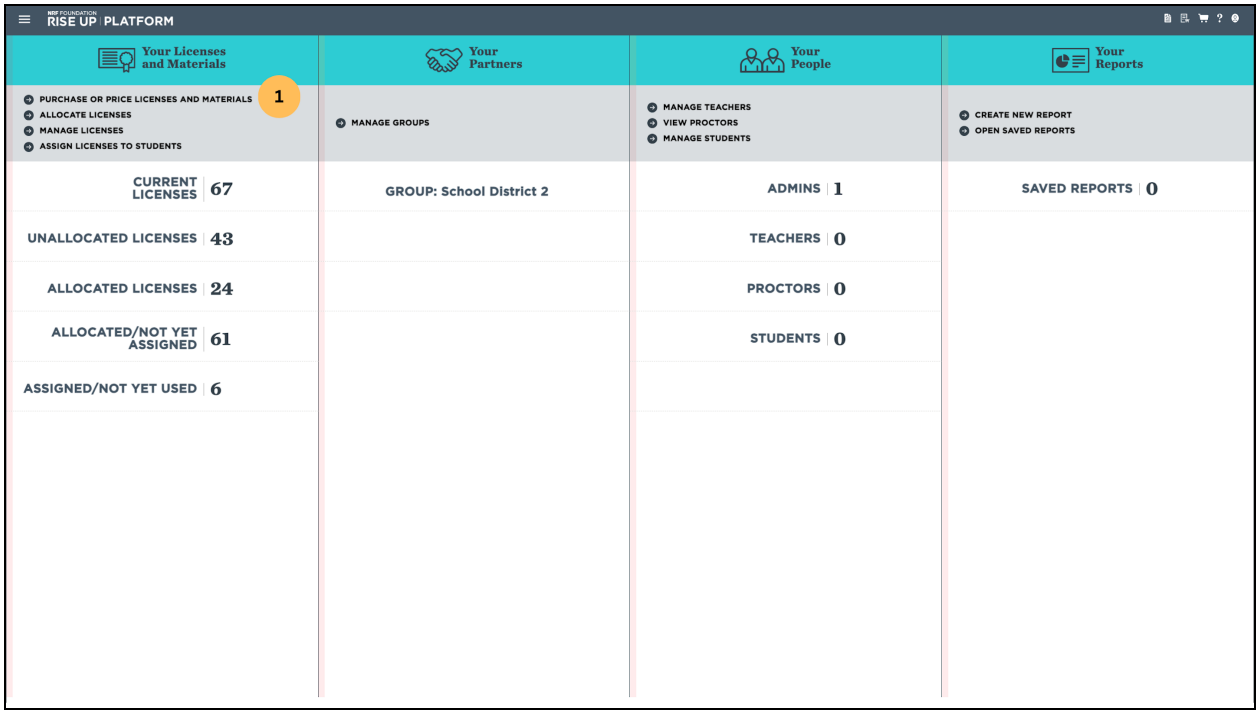
To add additional administrators for your organization or to remove administrators from your organization, please contact the RISE Up Customer Support team and provide the following information: your full name, email address and organization name, as well as the full name and email address of the administrator you wish to add or remove.

Note that all administrators for your organization will have full access to the organizations' connections, account information (including credit cards), and license information, as well as all the permissions to purchase, allocate, and withdraw licenses for your organization.

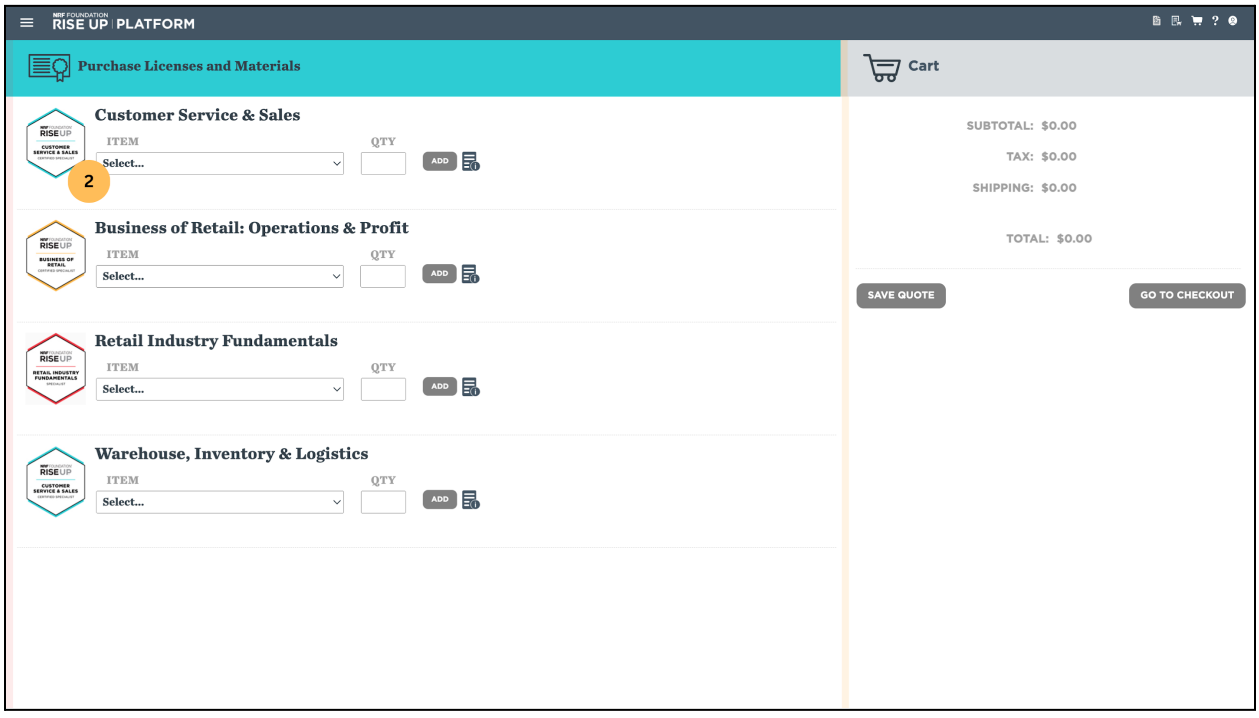
Purchasing Licenses and Materials

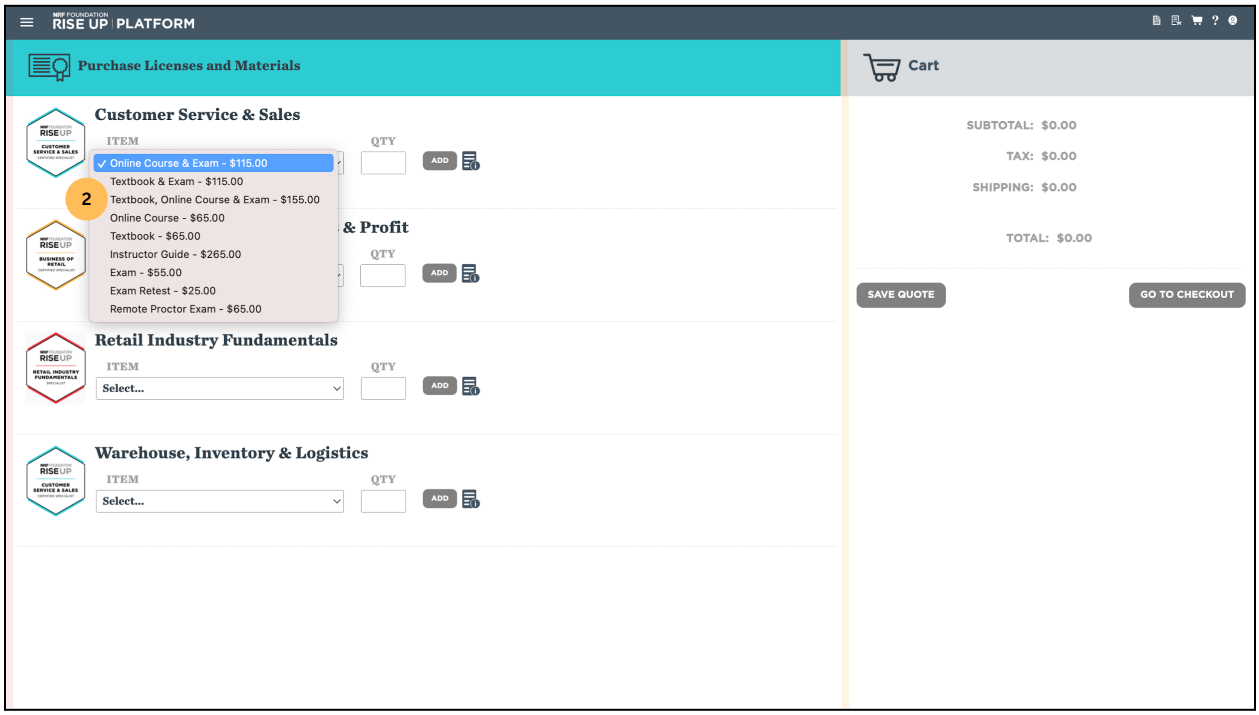
The RISE Up platform provides the ability for you to purchase course and exam licenses and materials.

1. Click **PURCHASE OR PRICE LICENSES AND MATERIALS** on the dashboard, or select it from the menu in the upper-left corner to open the Purchase Licenses and Materials page.

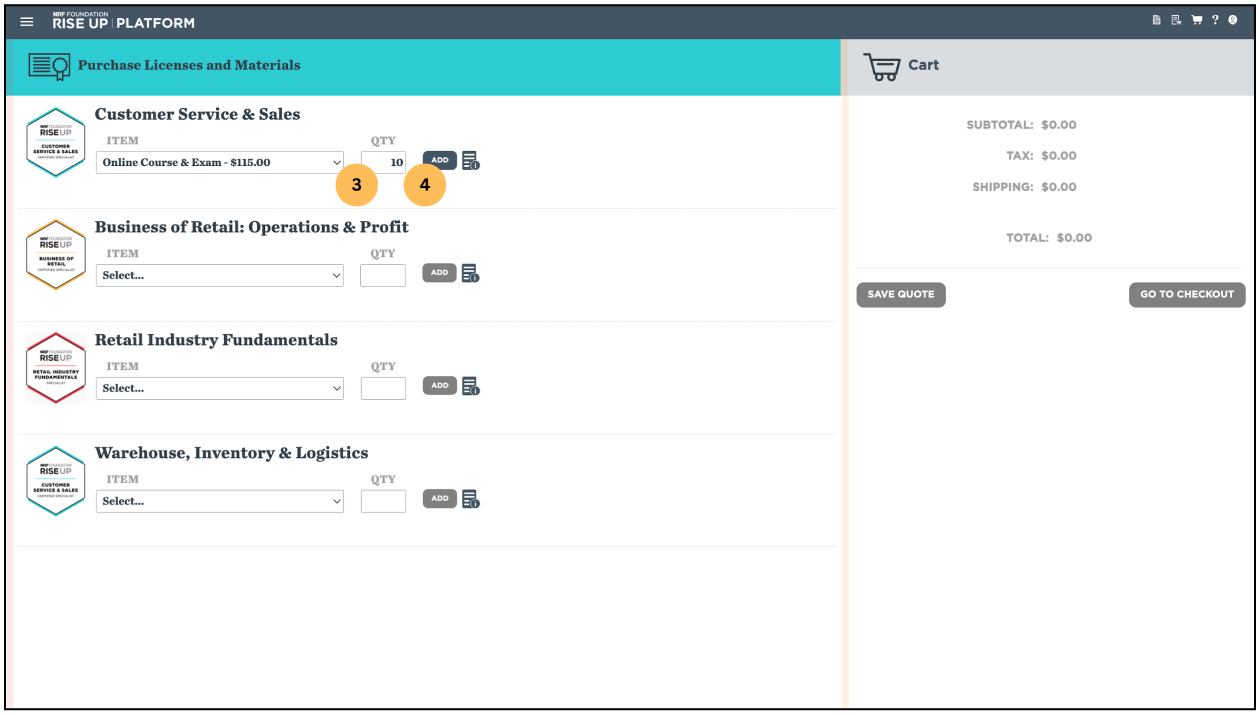


2. Select the ITEM(S) you would like to purchase.



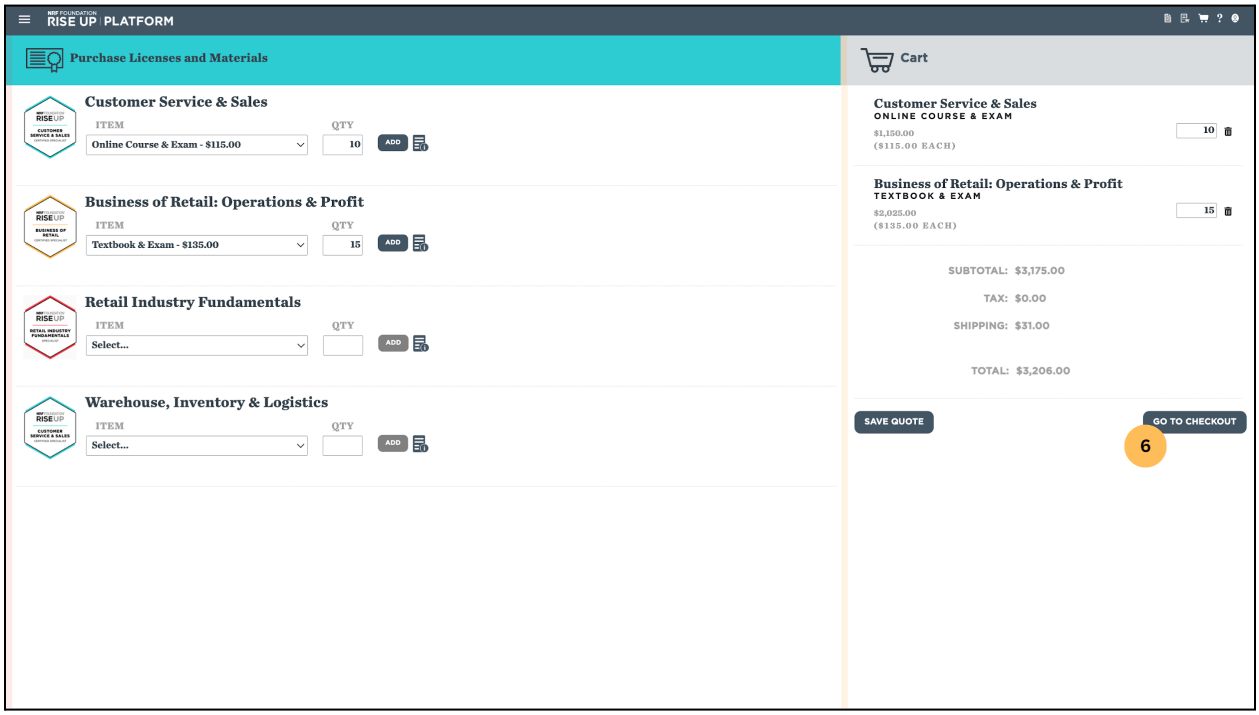


3. Enter the QUANTITY of the item you want to purchase.
4. Click **ADD** to add that program to your cart. The selected licenses and materials should appear in your cart on the right-hand side.

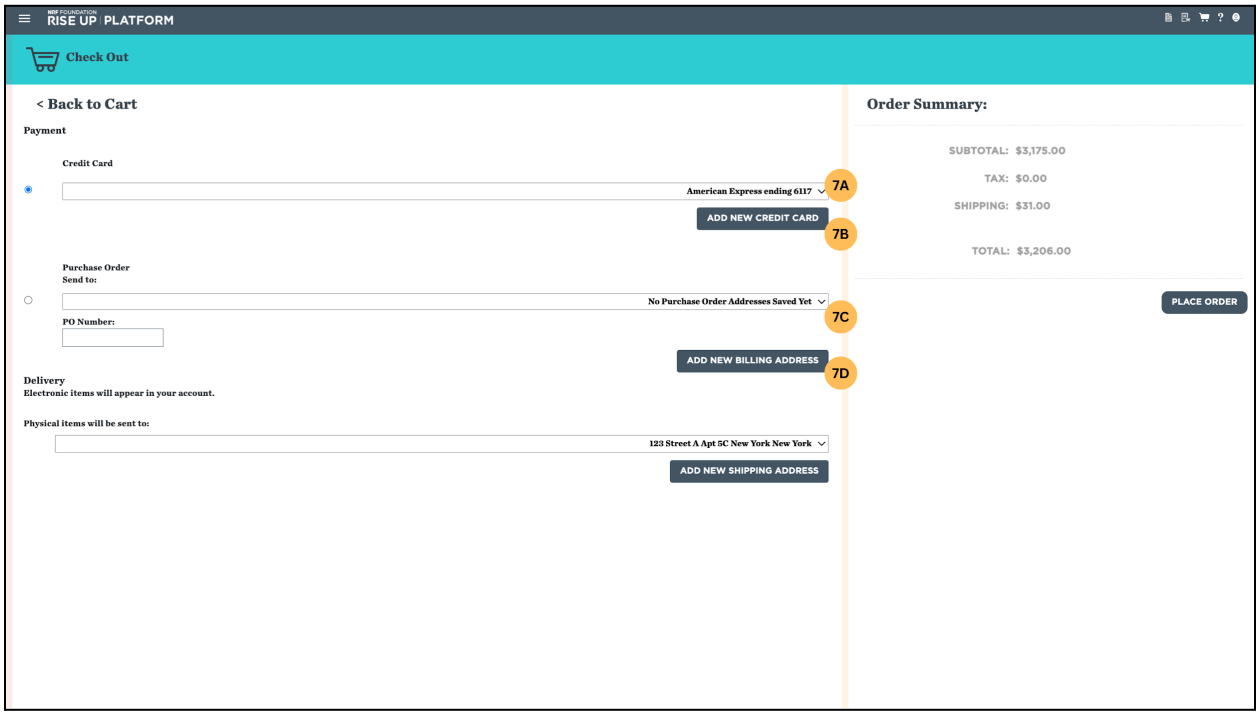


5. To purchase additional programs, repeat steps 2 - 4.

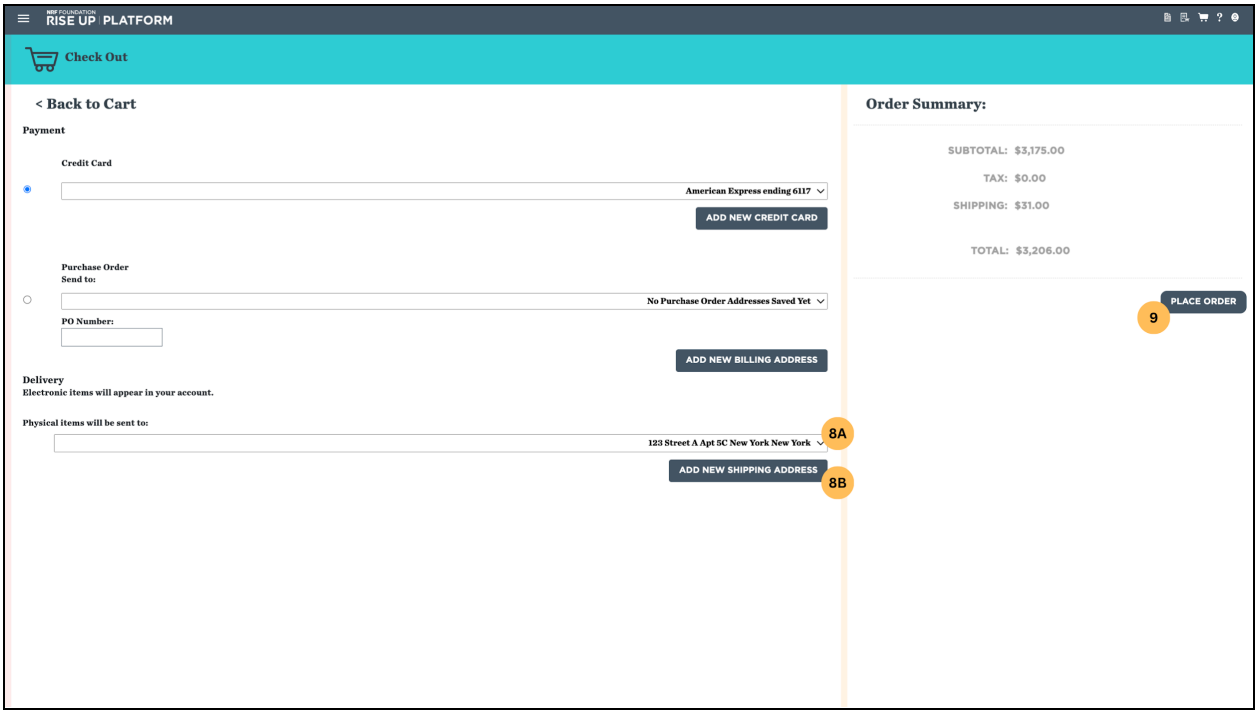
6. Click **GO TO CHECKOUT**.

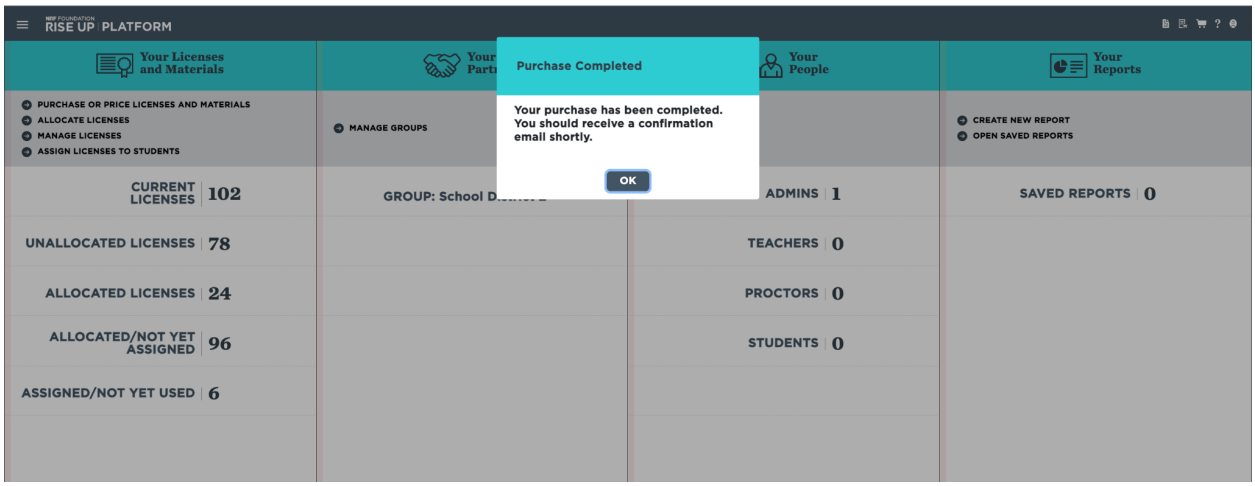


7. On the Check Out page, select which payment method you'd like to use.
    a. If you'd like to use a previously saved credit card, select it from the first drop-down menu.
    b. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD**. A dialog box asking you for the details of your new credit card will appear.
        i. Fill in the credit card details.
        ii. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box.
        iii. Click **SAVE CARD** to save your card details and proceed with your purchase.
    c. If you'd like to invoice a purchase order (PO) purchase to a previously saved address, you can select it from the second drop-down menu.
    d. If you'd like to invoice a purchase order (PO) purchase to a new billing address, click **ADD NEW PURCHASE ORDER (PO).** A dialog box asking you for the PO details will appear.
        i. Fill in the billing address and PO details.
        ii. If you'd like to set this PO billing address as your new default billing address, make sure the box is checked.
        iii. Click **SAVE CHANGES** to save your purchase order details and move forward with your purchase.



8. If there are physical items (like textbooks) in your order, select or enter a delivery address.
    a. If a shipping address has already been entered for your account, you can select it from the list.
    b. If there aren't any previously entered delivery addresses or if you want to use a new one, click **ADD NEW SHIPPING ADDRESS**. A dialog box will open.
        i. Fill in the address details.
        ii. Check if you want this to become your default shipping address.
        iii. Click **SAVE.**
9. Click **PLACE ORDER** to complete your purchase. Upon successful payment, online courses and exams will be available immediately. You will receive an email confirmation of your purchase. If you paid by purchase order, an invoice will also be available by clicking in the upper-right corner.

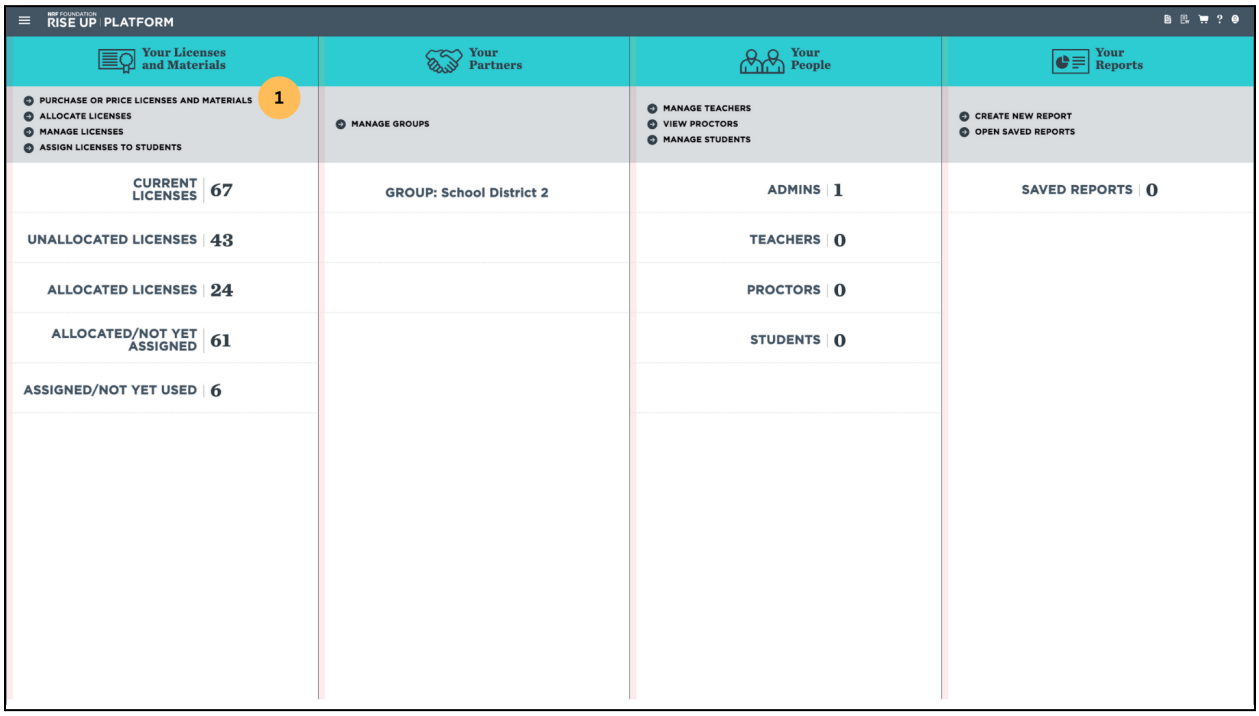

RISE UP | PLATFORM
Check Out
< Back to Cart
Payment
Credit Card
American Express ending 6117
ADD NEW CREDIT CARD
Purchase Order
Send to:
No Purchase Order Addresses Saved Yet
PO Number:
ADD NEW BILLING ADDRESS
Delivery
Electronic items will appear in your account.
Physical items will be sent to:
123 Street A Apt 5C New York New York
8A
ADD NEW SHIPPING ADDRESS
8B
Order Summary:
SUBTOTAL: $3,175.00
TAX: $0.00
SHIPPING: $31.00
TOTAL: $3,206.00
PLACE ORDER
9


RISE UP | PLATFORM
Your Licenses and Materials
PURCHASE OR PRICE LICENSES AND MATERIALS
ALLOCATE LICENSES
MANAGE LICENSES
ASSIGN LICENSES TO STUDENTS
CURRENT LICENSES | 102
UNALLOCATED LICENSES | 78
ALLOCATED LICENSES | 24
ALLOCATED/NOT YET ASSIGNED | 96
ASSIGNED/NOT YET USED | 6
MANAGE GROUPS
Purchase Completed
Your purchase has been completed. You should receive a confirmation email shortly.
OK
Your People
ADMINS | 1
TEACHERS | 0
PROCTORS | 0
STUDENTS | 0
Your Reports
CREATE NEW REPORT
OPEN SAVED REPORTS
SAVED REPORTS | 0

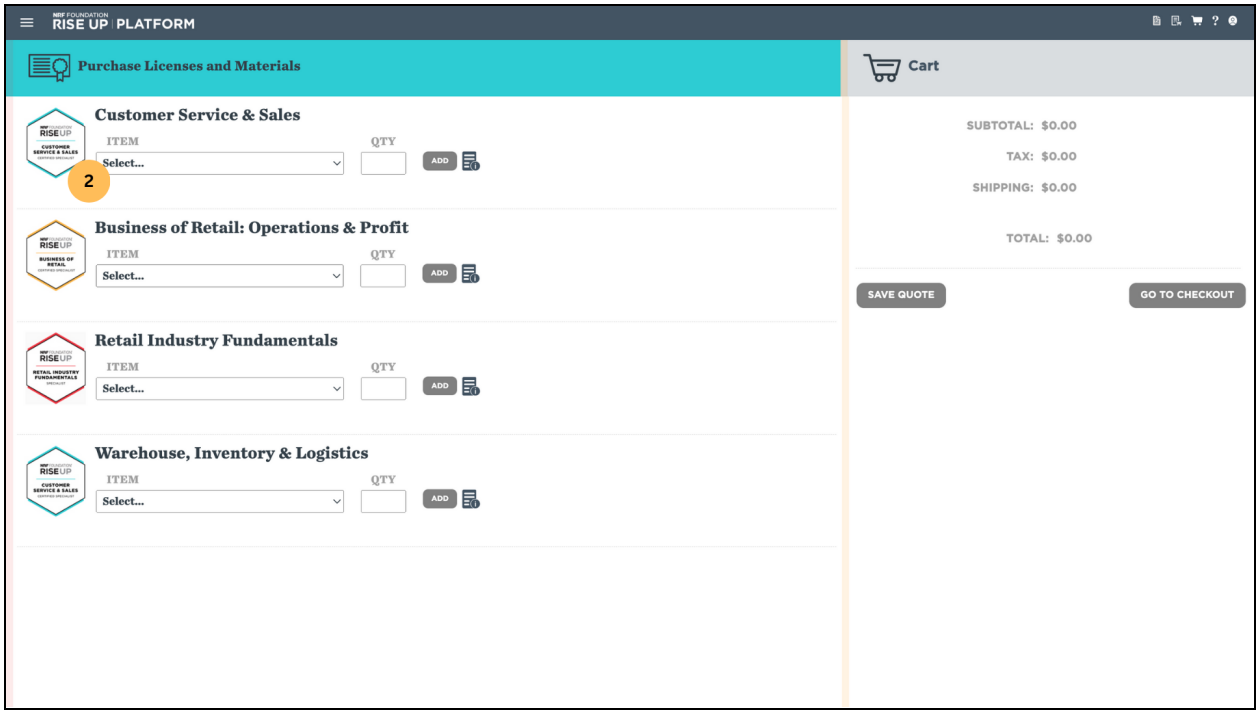
Pricing Licenses and Materials (Creating Quotes)

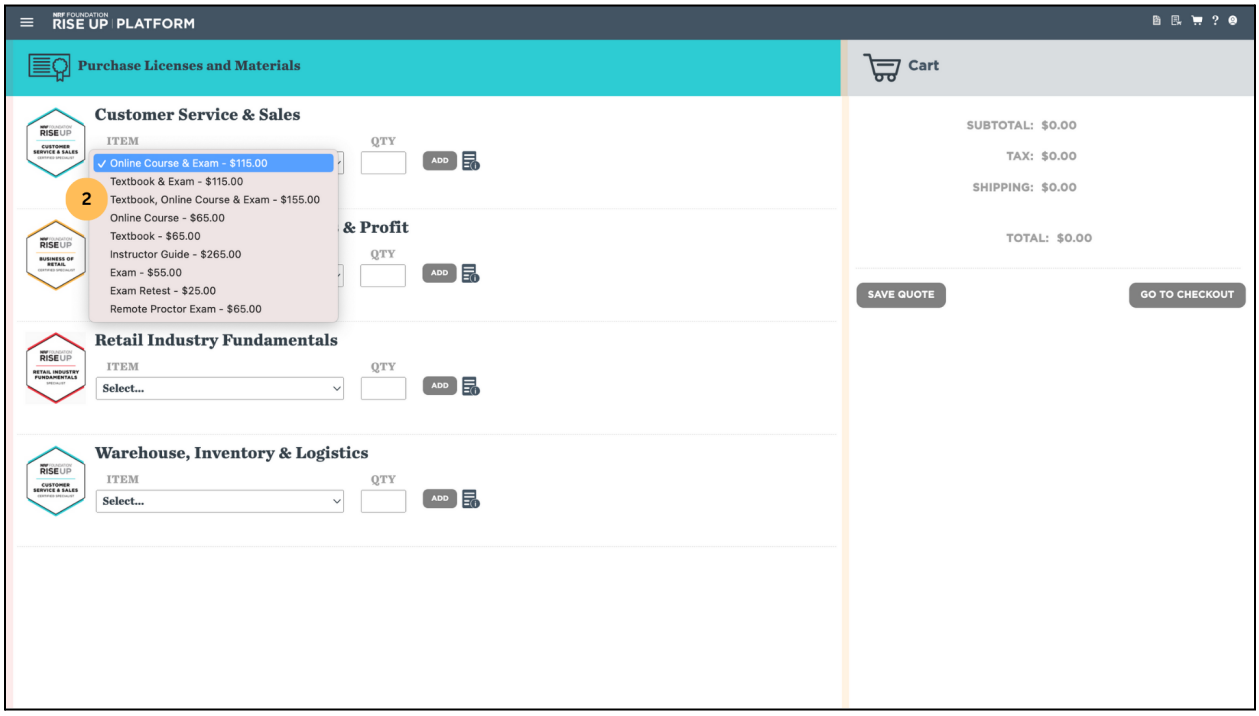
The RISE Up platform lets you create and save a quote to get the total cost for an order before proceeding with a purchase. You can then download the quote to share it if you need to get approval for an order, submit it for budgeting, or share with others in your organization.

1. Click **PURCHASE OR PRICE LICENSES AND MATERIALS** on the dashboard or select it from the menu in the upper-left corner.

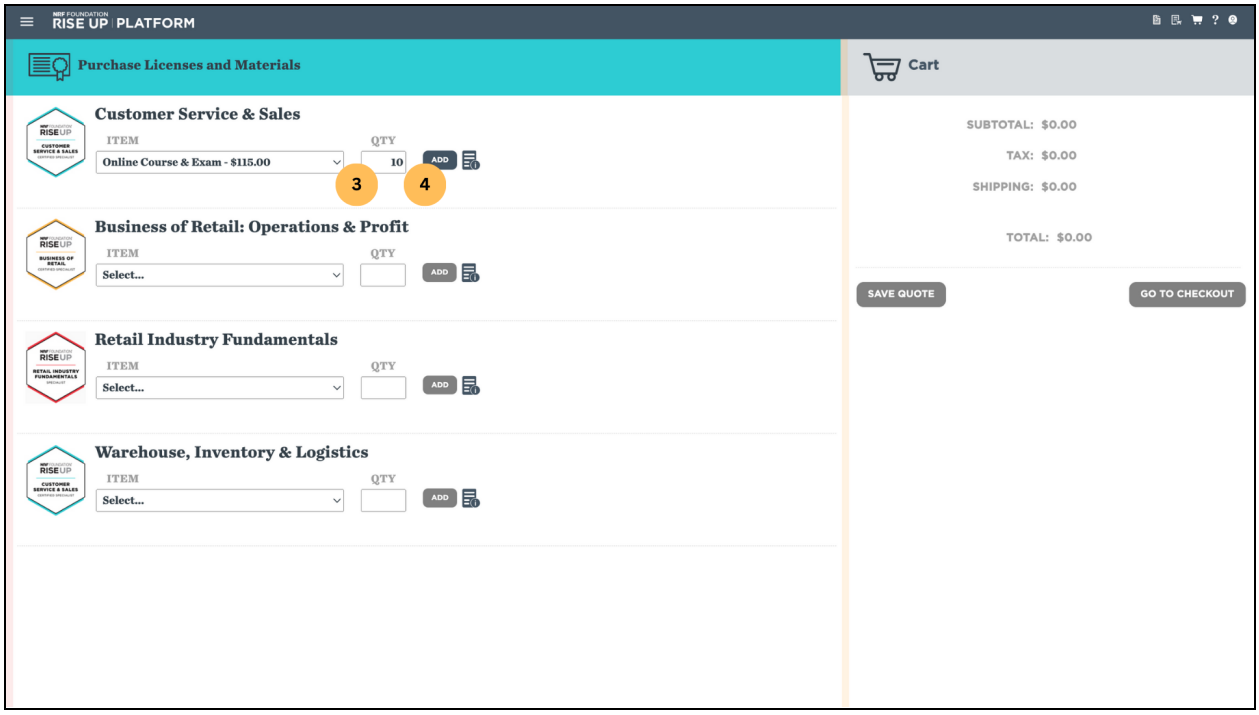


2. Select the ITEMS you would like to add to your quote.

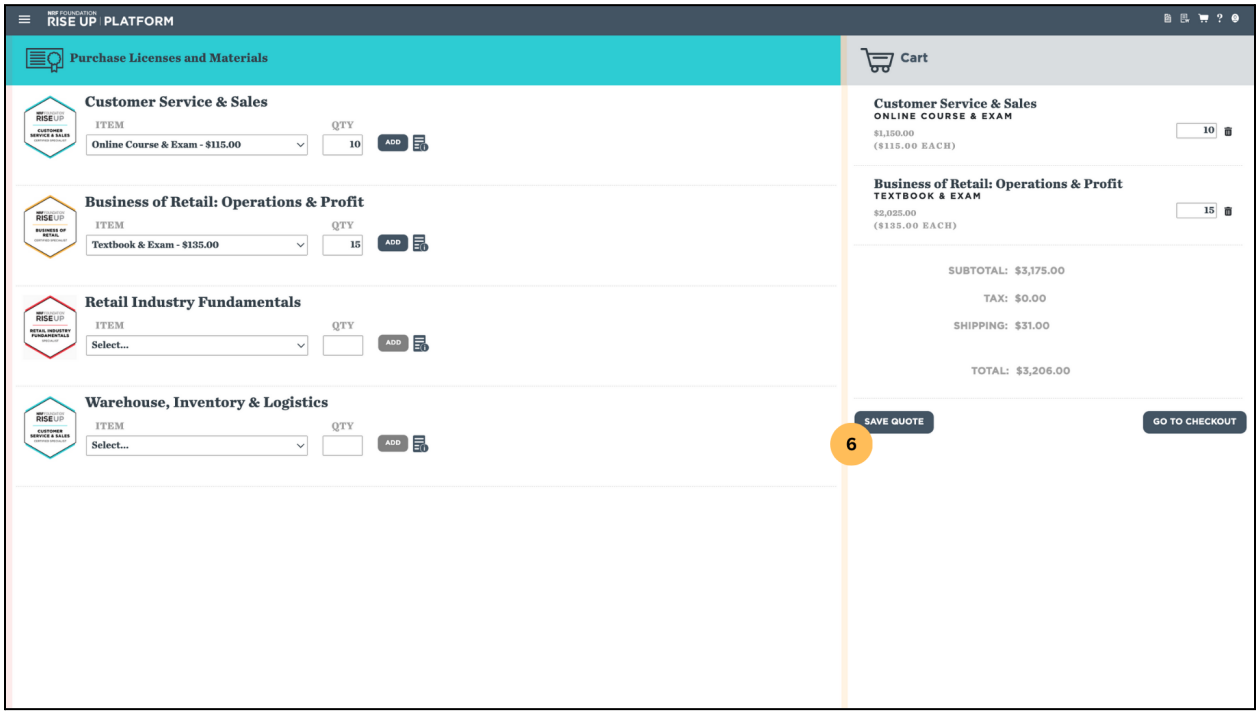




3. Enter the QUANTITY of each item that you want to add to your quote.
4. Click **ADD** to add that program to your cart.

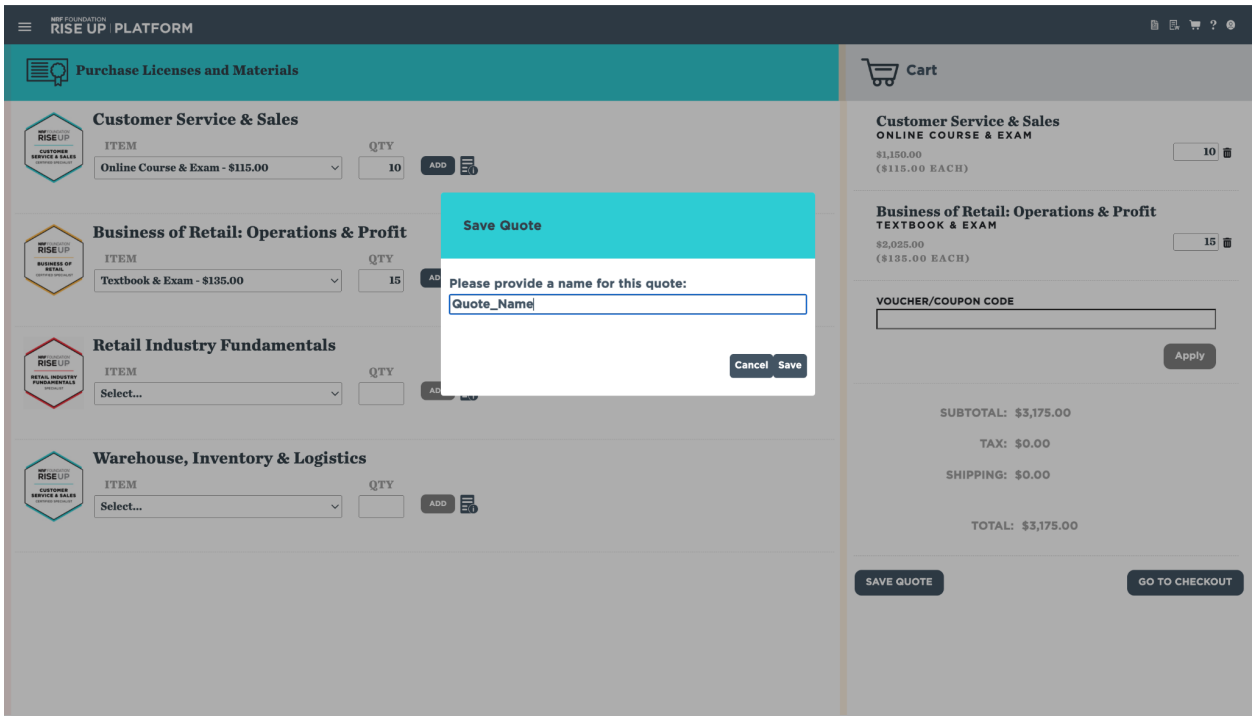


5. To add additional items, repeat steps 2-4.
6. Click **SAVE QUOTE.**



7. Enter a name for the quote.

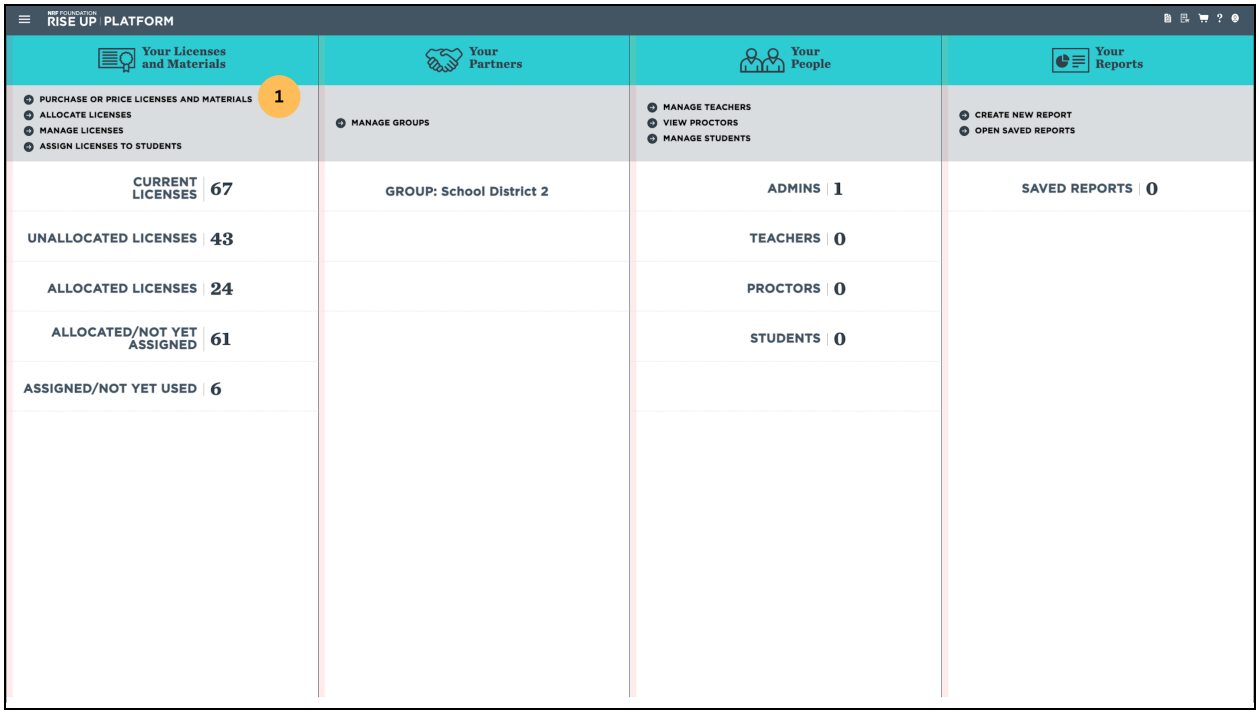
8. Click **Save**.



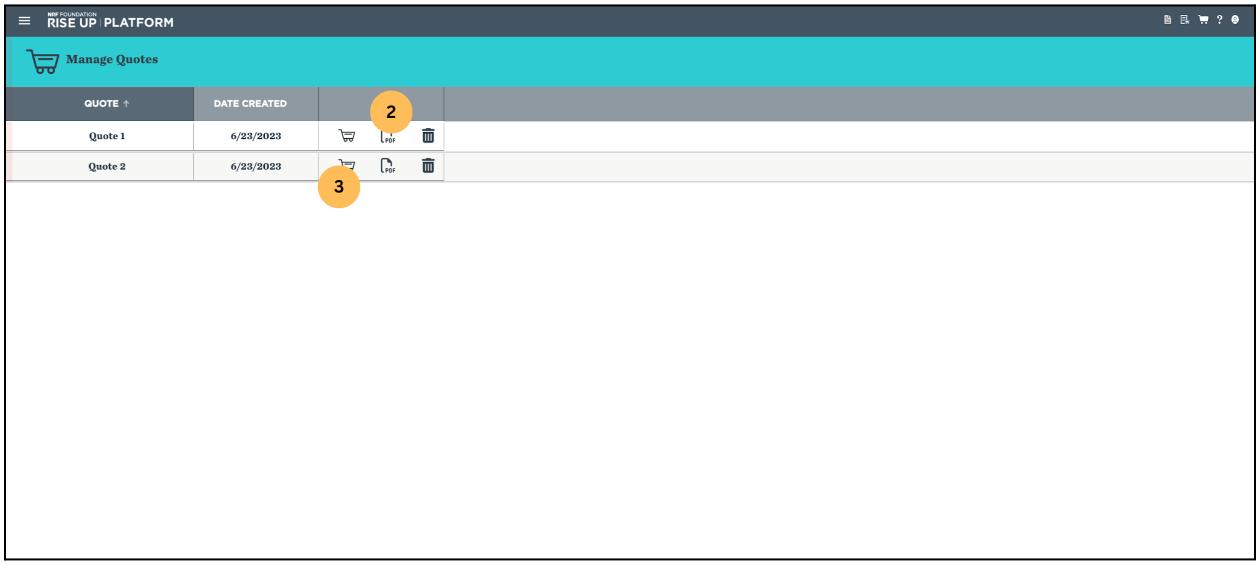
Purchasing Licenses and Materials from a Saved Quote

Once you've saved a quote, you can come back to it at any time to purchase the items.

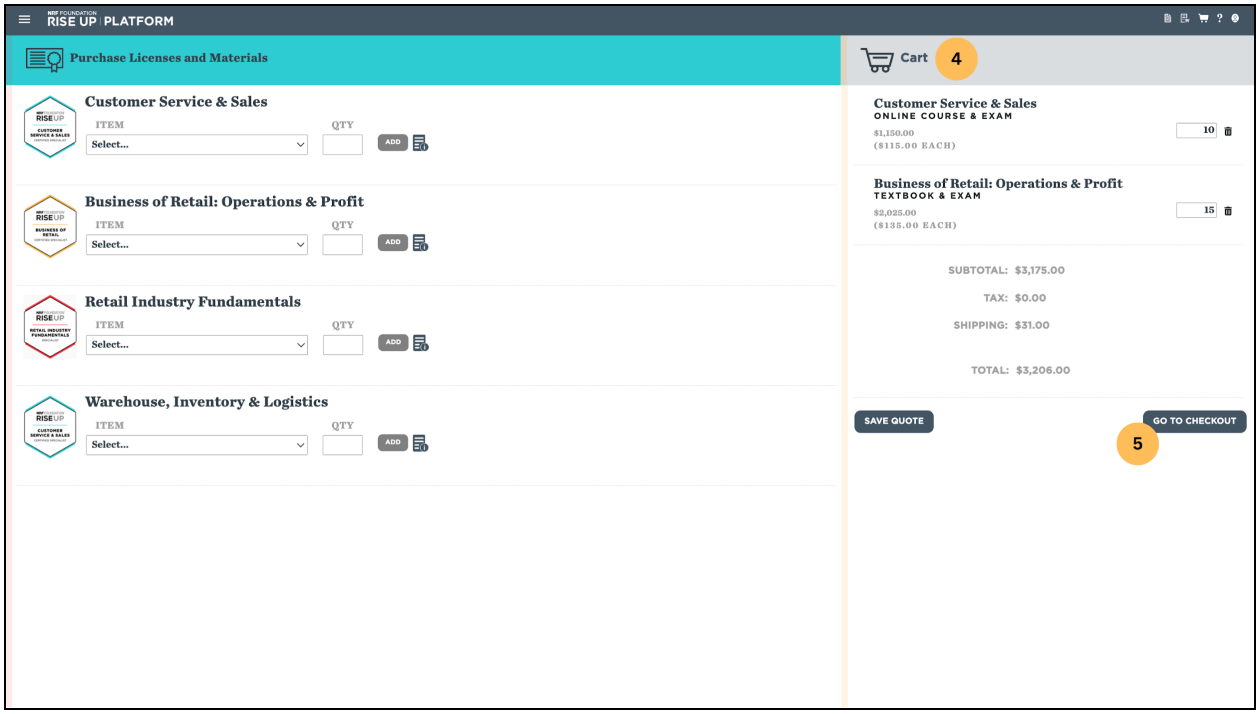
1. Click the Quotes icon in the upper-right corner of any page to open the Manage Quotes page.



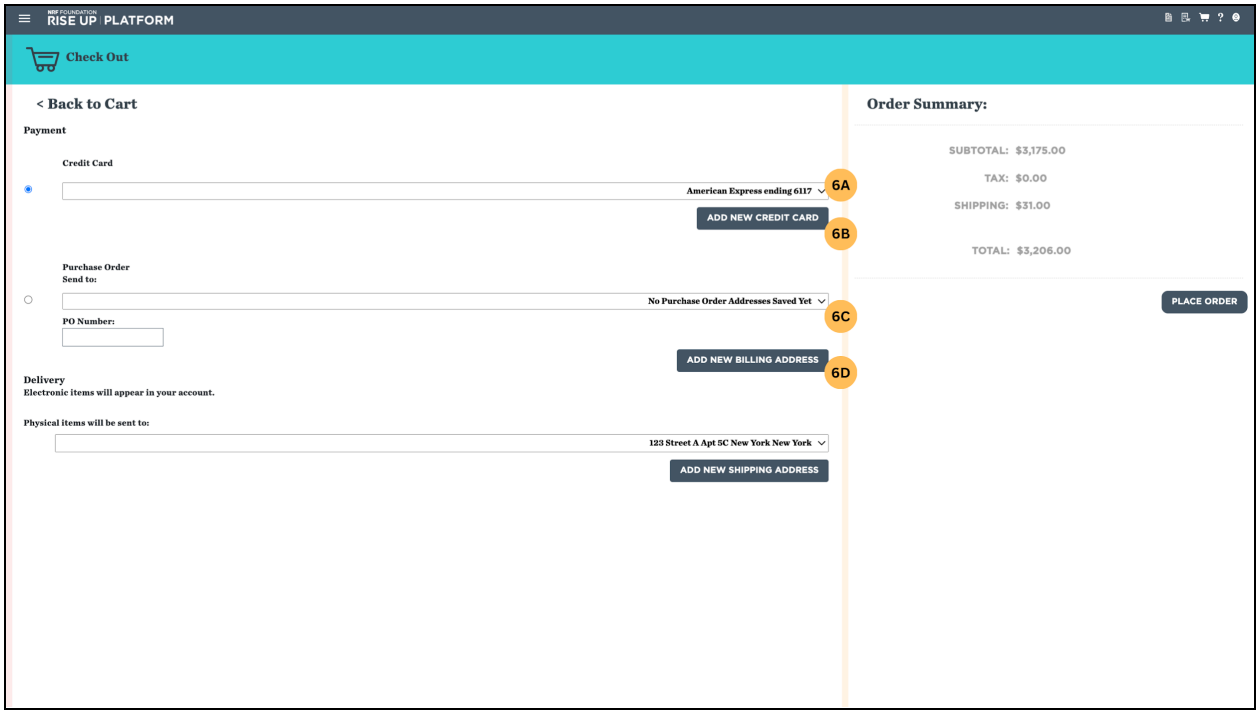
2. Identify the quote you would to purchase; you can click on the quote icon to see the details for that quote.
3. Once you've identified the quote, click the cart icon for that quote. The Purchase or Price Licenses and Materials page will open, with the items from the quote in the cart.



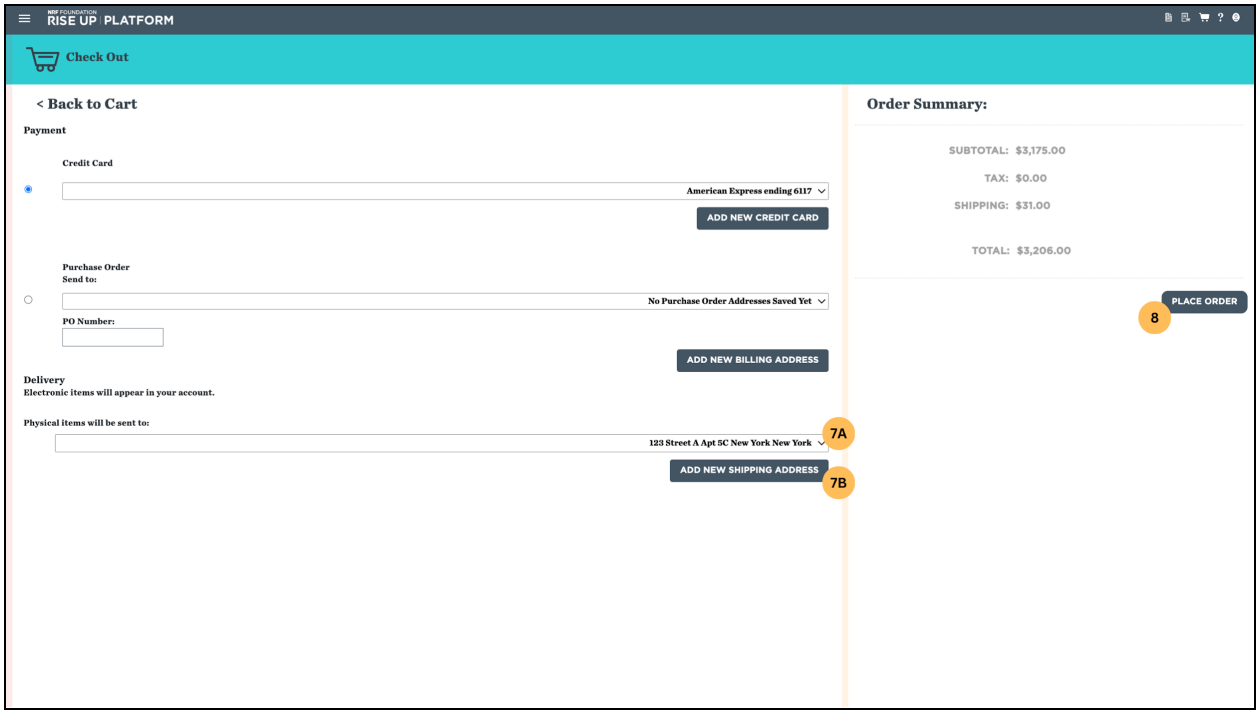
4. Make any adjustments to the items in the cart.
5. Click **GO TO CHECKOUT**.

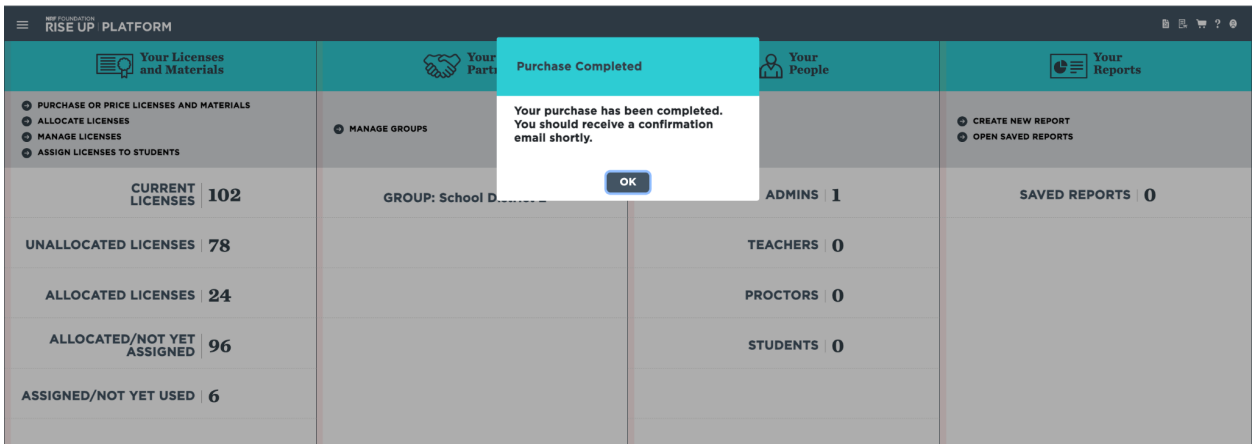


6. On the Check Out page, select the payment method you'd like to use.
    a. If you'd like to use a previously saved credit card, select it from the first drop-down menu.
    b. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD**. A dialog box asking you for the details of your new credit card will appear.
        i. Fill in the credit card details.
        ii. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box.
        iii. Click **SAVE CARD** to save your card details and move forward with your purchase.
    c. If you'd like to invoice a purchase order (PO) purchase to a previously saved billing address, you can select it from the second drop-down menu.
    d. If you'd like to invoice a purchase order (PO) purchase to a new billing address, click **ADD NEW PURCHASE ORDER (PO).** A dialog box asking you for the PO address will appear.
        i. Fill in the billing address and PO details.
        ii. If you'd like to set this PO billing address as your new default billing address, make sure the box is checked.
        iii. Click **SAVE CHANGES** to save your purchase order details and move forward with your purchase.

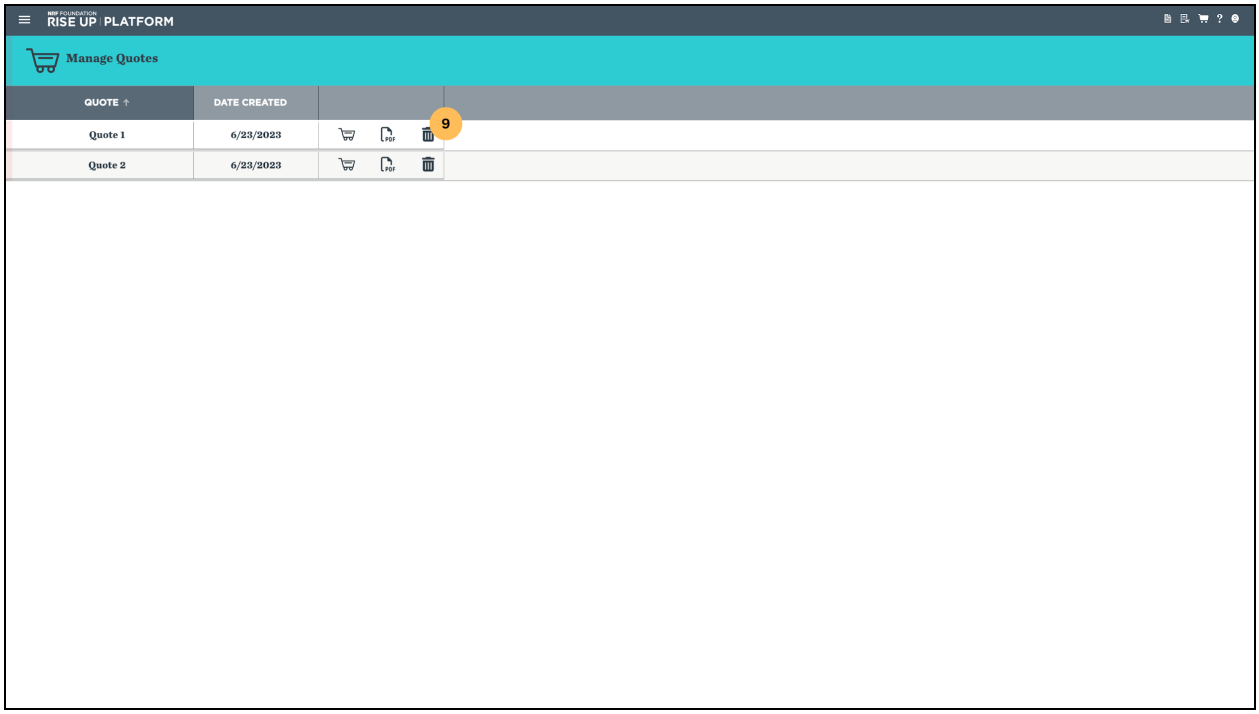


7. If there are physical items (like textbooks) in your order, select or enter a delivery address.
    a. If a shipping address has already been entered for your account, you can select it from the list.
    b. If there aren't any previously entered delivery addresses or if you want to use a new one, click **ADD NEW SHIPPING ADDRESS**. A dialog box will open.
        i. Fill in the address details.
        ii. Check if you want this to become your default shipping address.
        iii. Click **SAVE**.
8. Click **PLACE ORDER** to complete your purchase. Online courses and exams will be available immediately. You will receive an email confirmation of your purchase. If you paid by purchase order, an invoice will also be available by clicking in the upper-right corner.





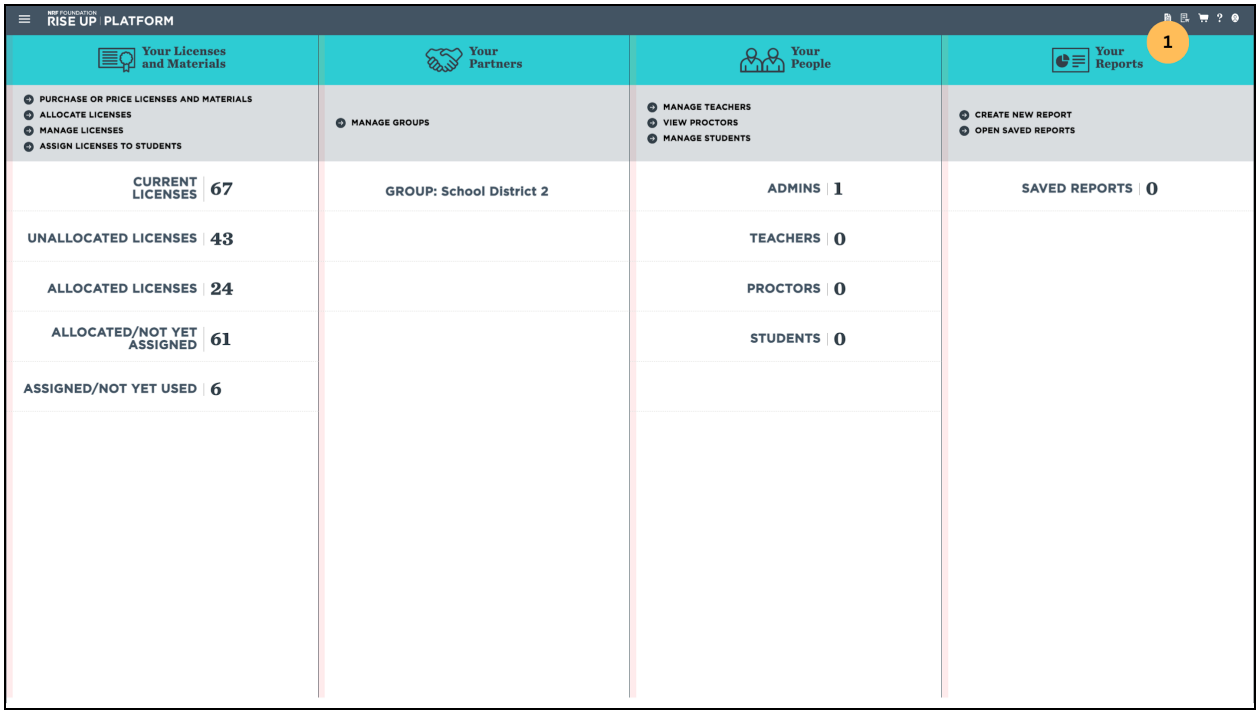
9. If you'd like, you can return to Manage Quotes and delete the quote now that you have purchased it.



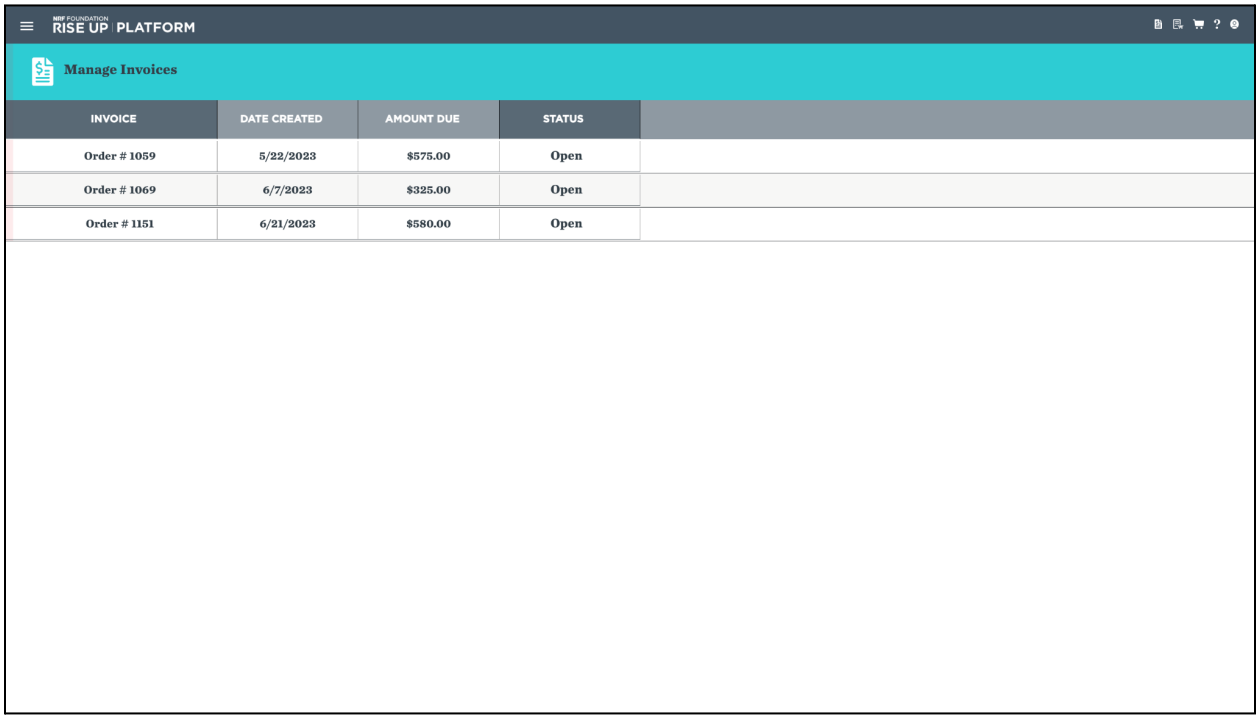
Paying an Invoice

If you've made a purchase with a Purchase Order (PO), an invoice will be sent to you by email. You can also access it on the Manage Invoices page.

1. Click the Invoices icon in the upper-right corner of any page to open the Manage Invoices page.



2. Identify the invoice you want to review or pay.
3. Click on the invoice to see the full invoice.



4. Remit payment by mailing a check to the address listed or via wire transfer sending to the account details noted on the invoice.

Allocating Licenses

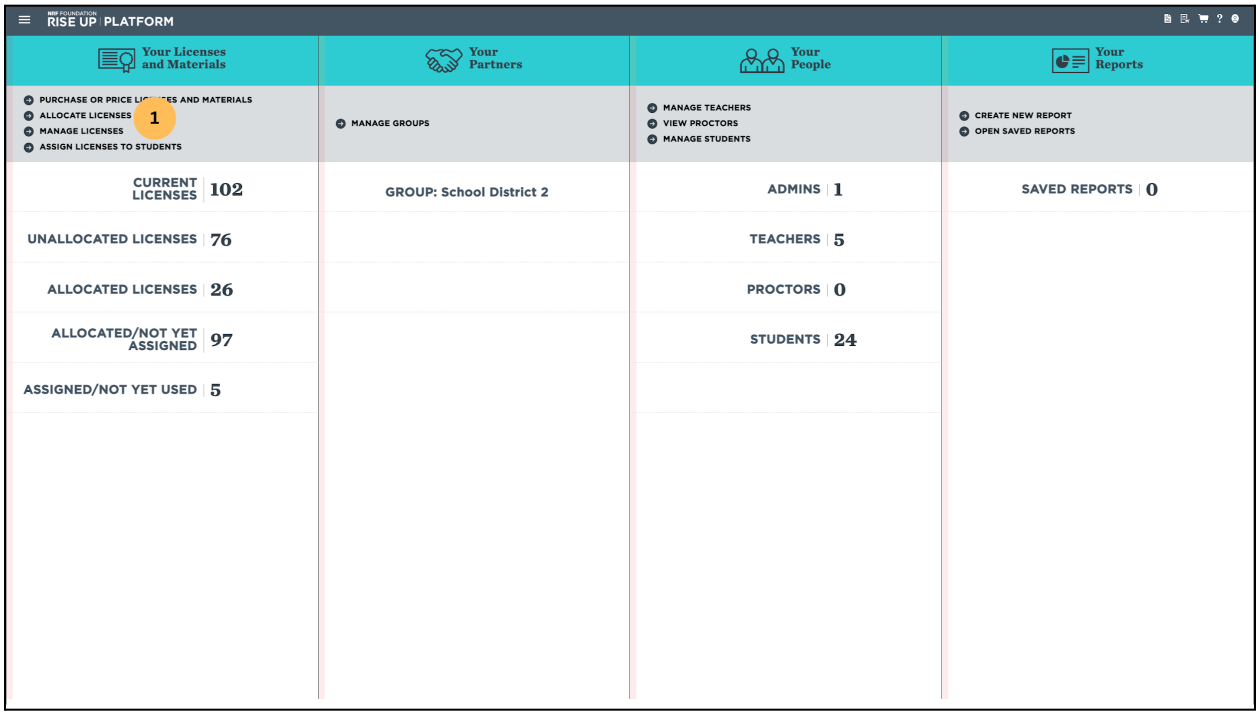
After licenses are purchased or allocated to you, you can allocate them to teachers you are connected to. This allows them to assign the courses or exams to their students. You will be able to see the status of the licenses, and you can withdraw unused licenses if needed.

Allocating multiple licenses of the same kind can be done from the Allocate Licenses page. Allocating a selection of specific licenses can be done from the Manage Licenses page.

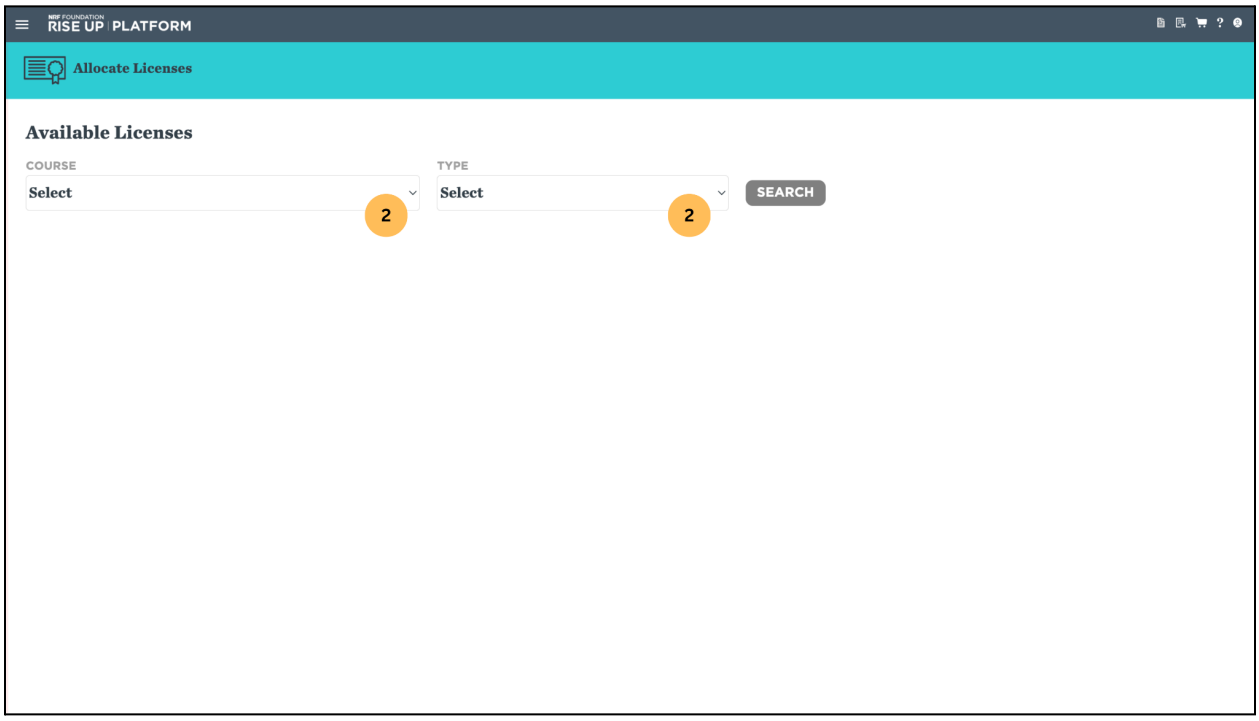
Before you can allocate licenses to a teacher, you need to add that site or teacher first. You can do that by following the process for Add Teachers, and you can check the Manage Teachers page to confirm that you are connected to the teacher you want to allocate to.

To allocate multiple licenses:

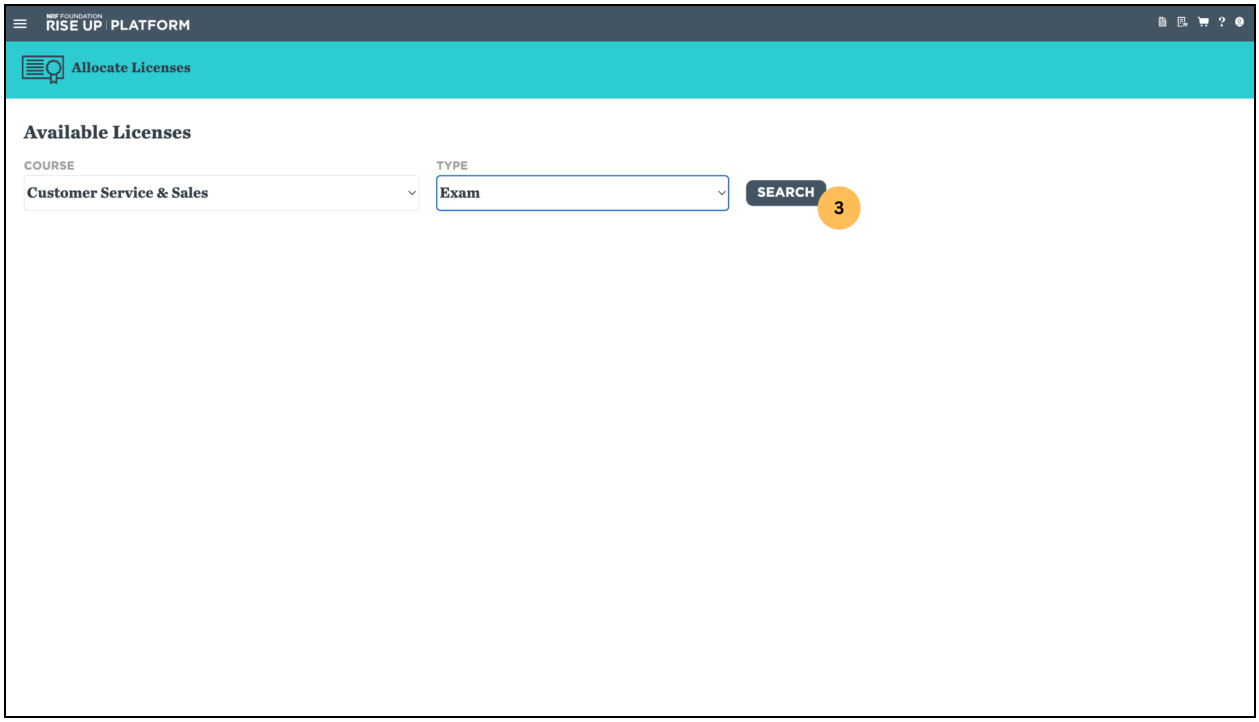
1. Click **ALLOCATE LICENSES** on the dashboard in the first column under **Your Licenses and Materials**, or select it from the menu in the upper-left corner. You can also click **GO TO LICENSE ALLOCATION** from the Manage Licenses page.



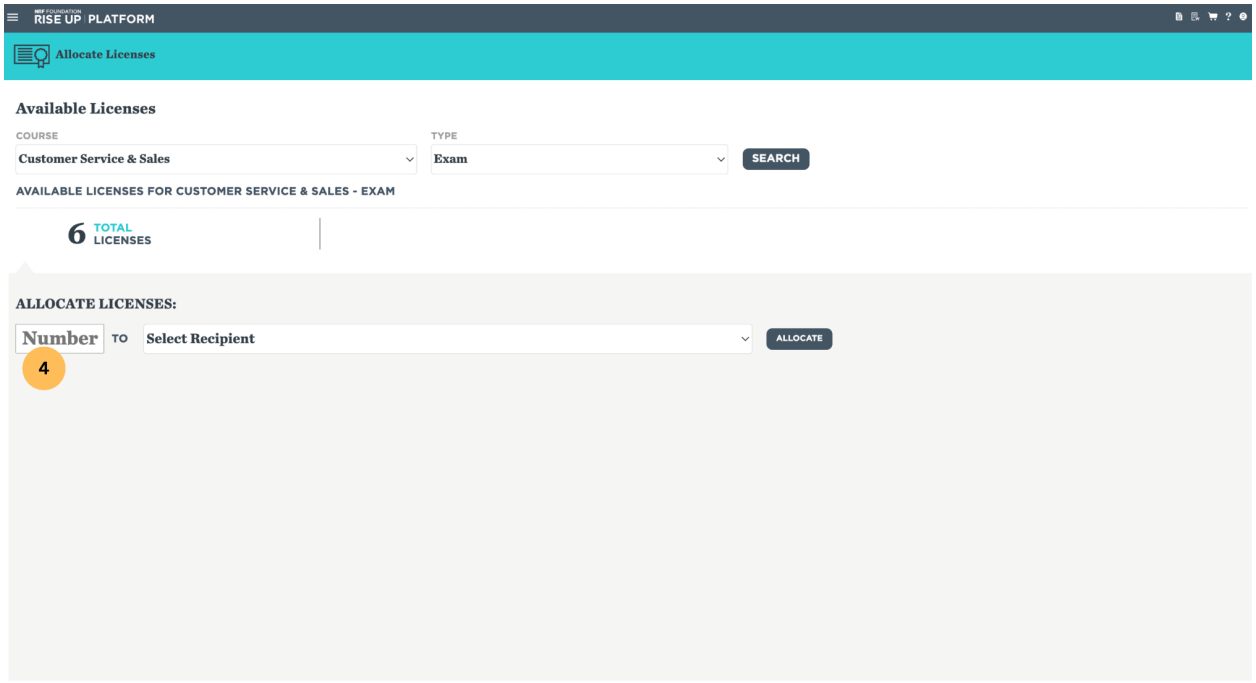
2. On the Allocate Licenses page, select the course name and license type you would like to allocate.

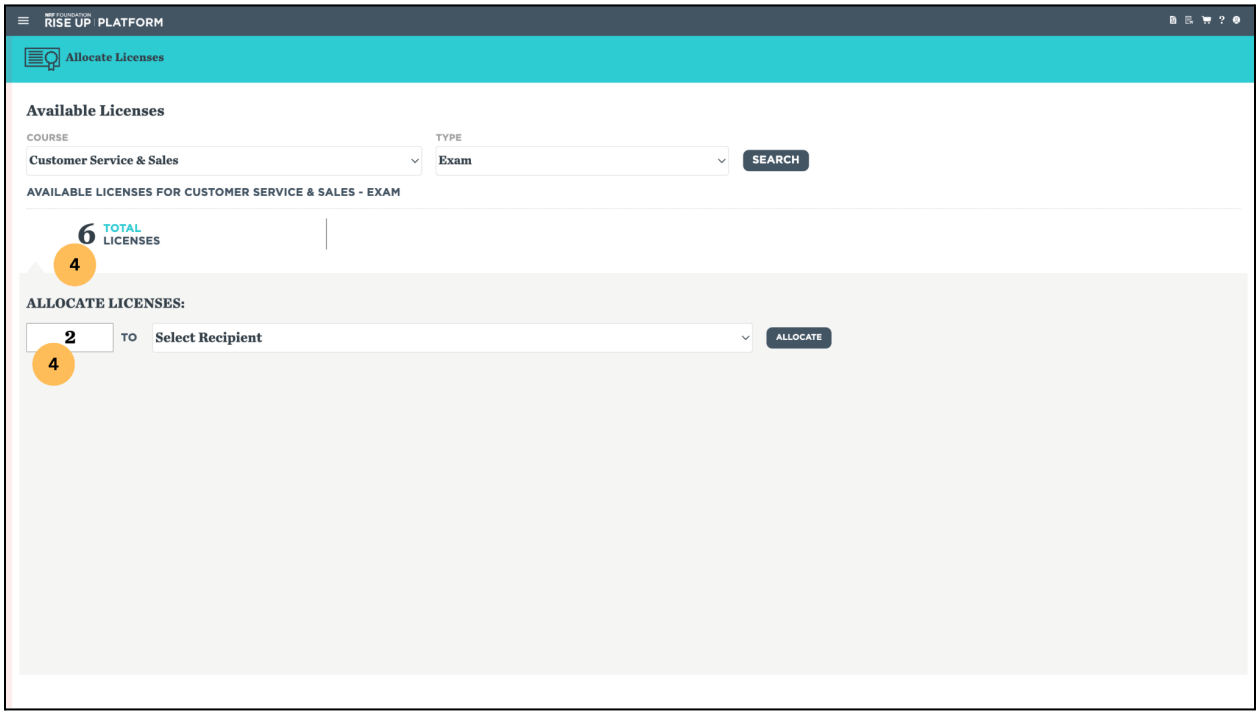


3. Click **SEARCH** to find the number of licenses available to allocate.



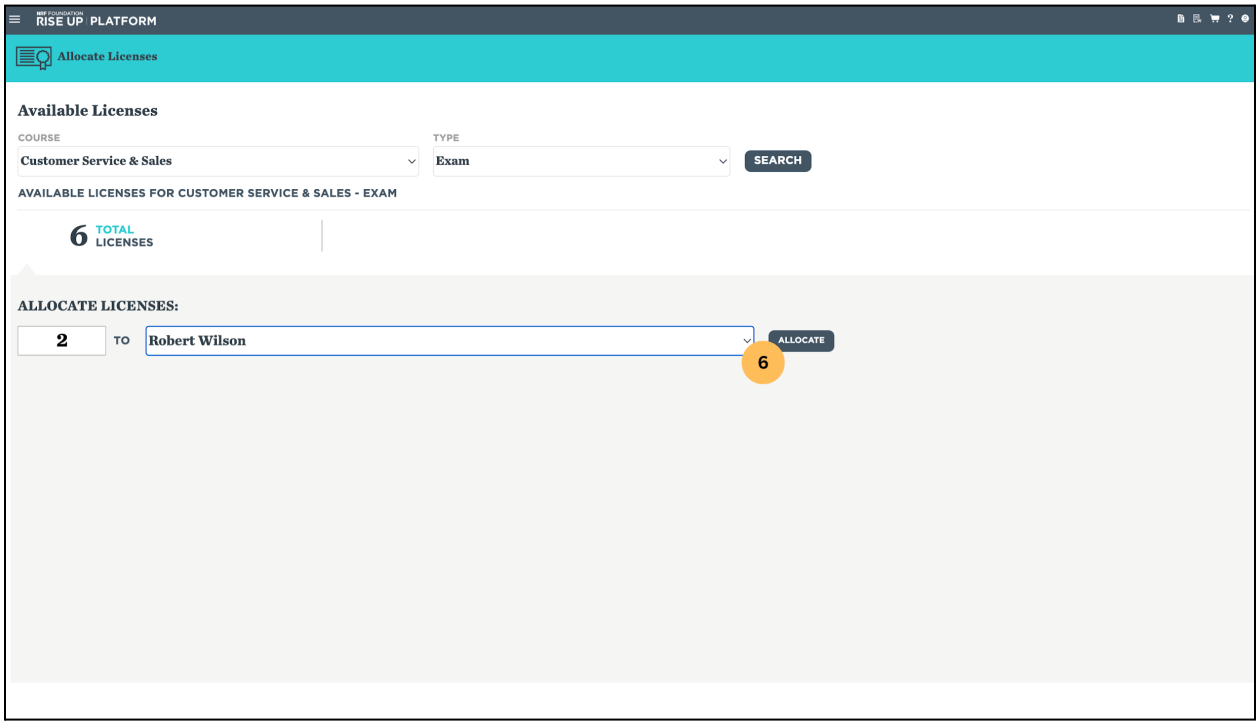
4. Enter the number of licenses you'd like to allocate into the **Number** field. You can only allocate as many licenses as are shown in the search results.



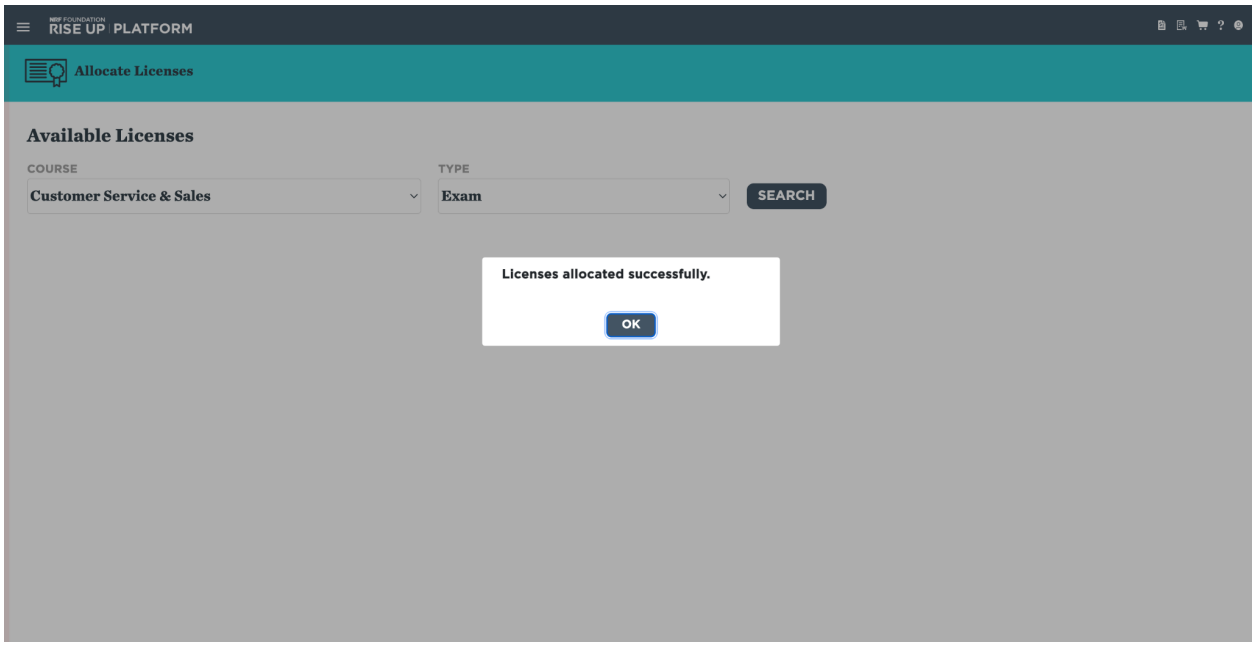


5. Select the teacher you wish to allocate the licenses to from the **Select Recipient** drop-down menu.

6. Click **ALLOCATE** to allocate those licenses to the selected recipient.

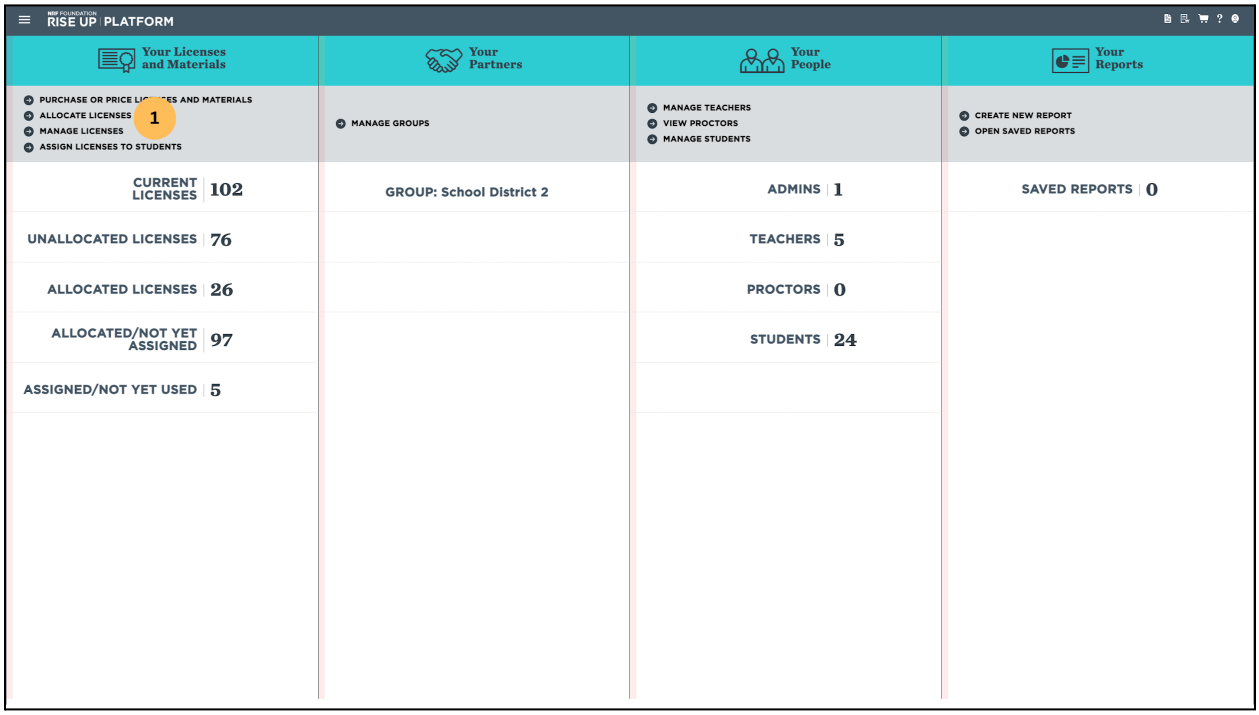


7. A dialog box confirming that the licenses have been successfully allocated will appear. Click **OK** to return to the Allocate Licenses page. These licenses will be deducted from your available licneses and will be available to the recipient immediately, and they will still appear in your list on the Manage Licenses page in case you want to withdraw them or check their status.

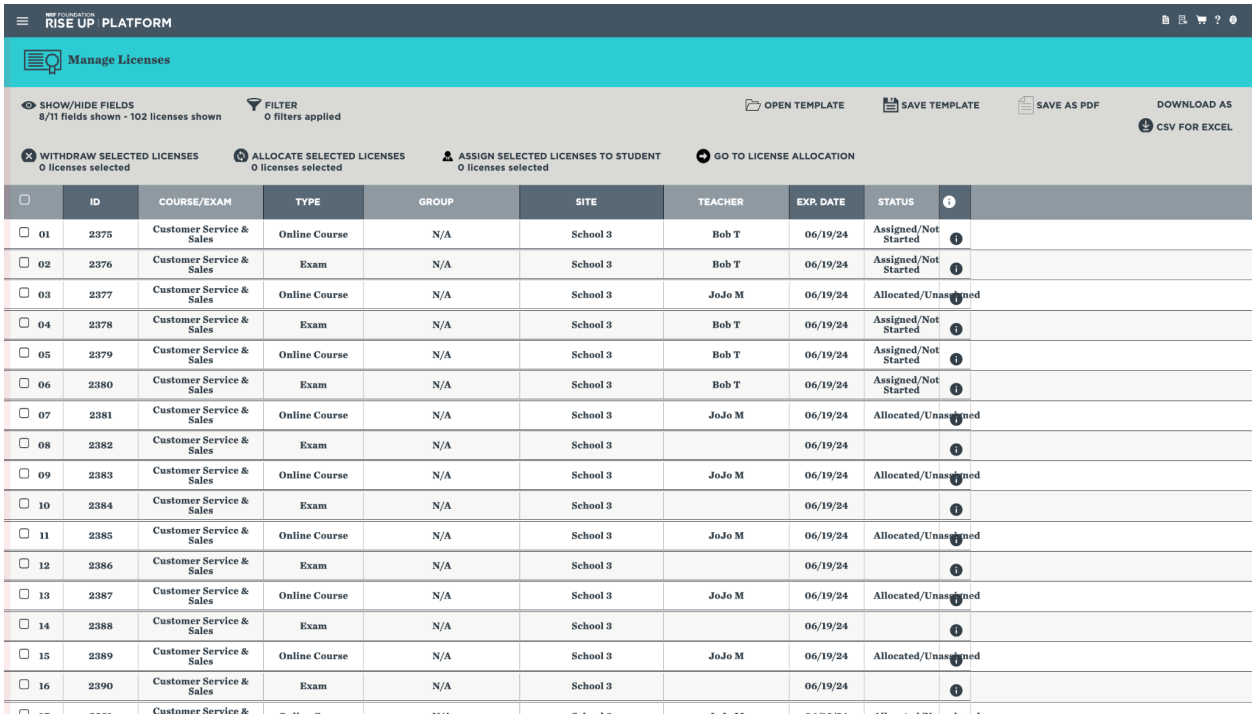


To allocate specific licenses:

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



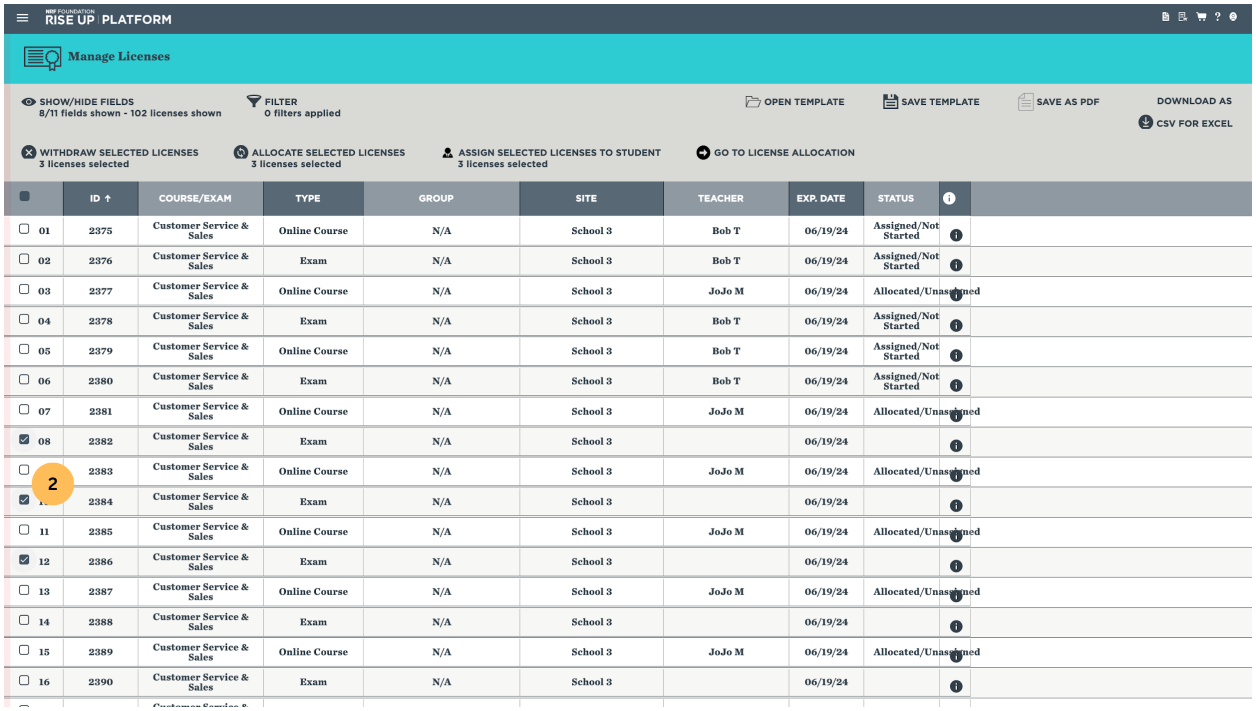
2. On the Manage Licenses page, identify the license(s) you want to allocate.



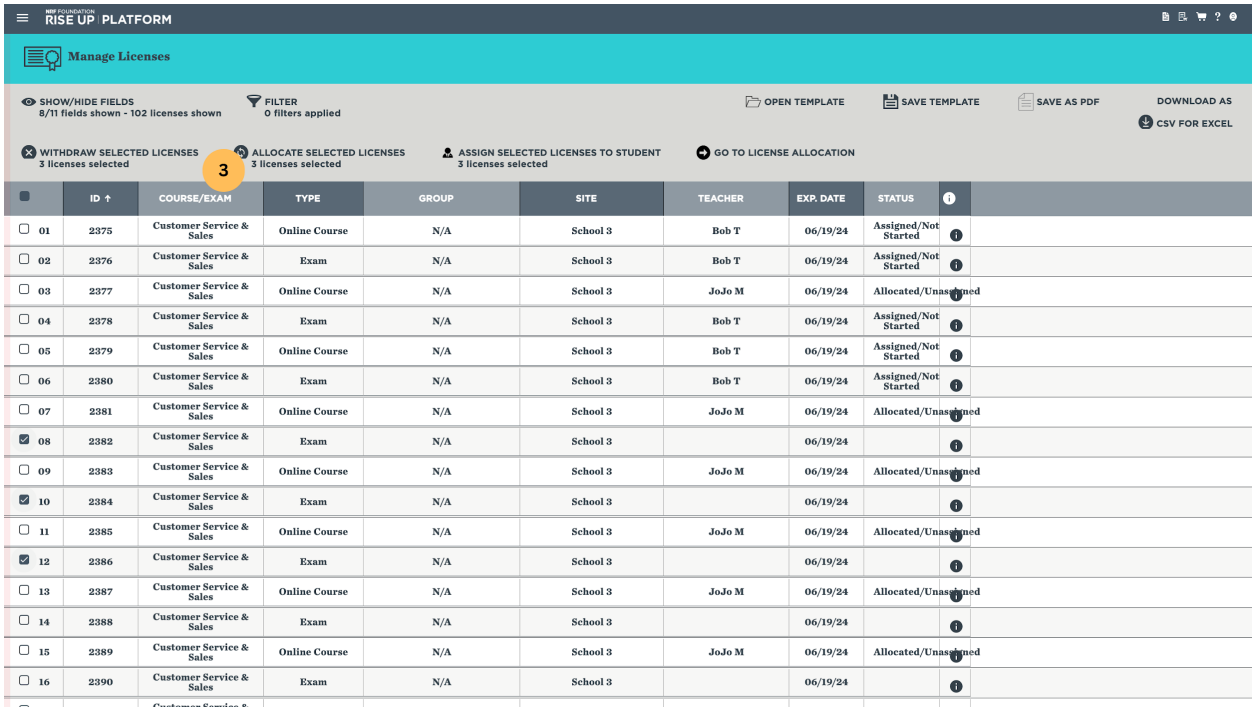
To help you find the licenses, you can:

- Use the **SHOW/HIDE FIELDS** feature to see more or less about each license;
- Use **FILTER** to help narrow down the list of licenses; and
- Click on the column headings to sort the list of licenses.

Click on the checkbox in the far left column for each license you wish to select. The number of licenses selected is displayed below the menu option.

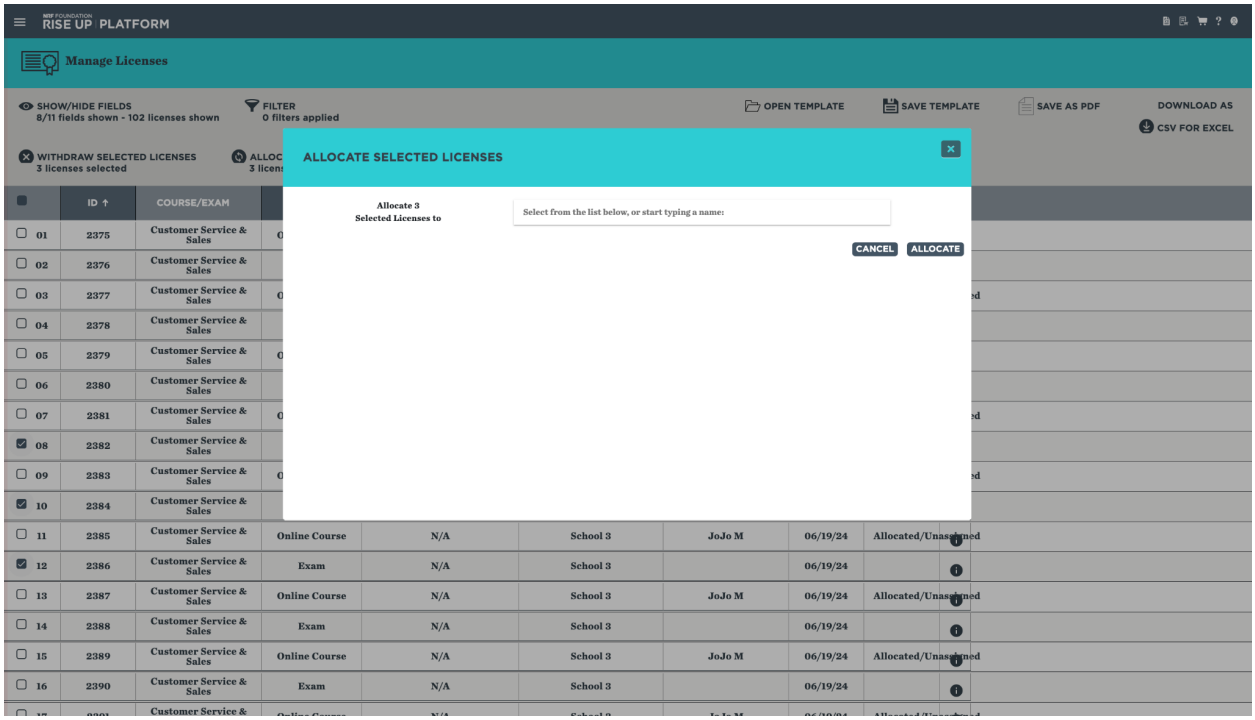


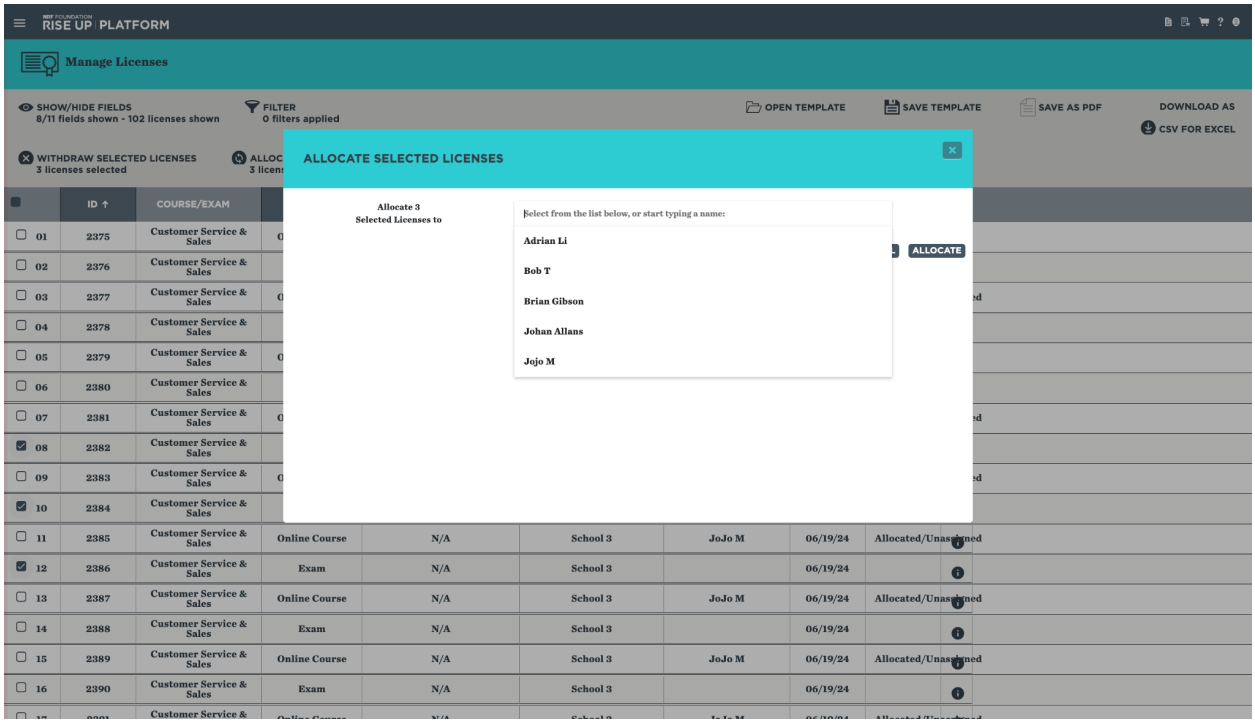
3. Click **ALLOCATE SELECTED LICENSES**. A dialog box will open with a list of all the teachers your organization is connected to.



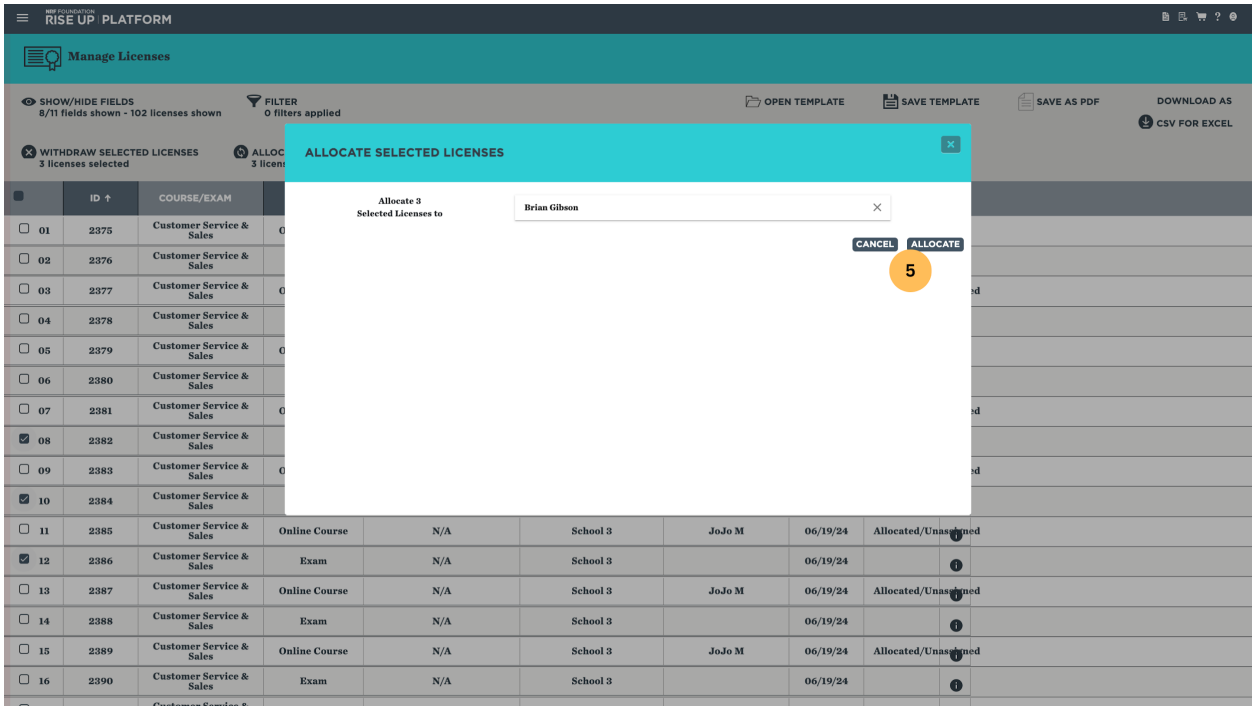
	ID	COURSE/EXAM	TYPE	GROUP	SITE	TEACHER	EXP. DATE	STATUS
01	2375	Customer Service & Sales	Online Course	N/A	School 3	Bob T	06/19/24	Assigned/Not Started
02	2376	Customer Service & Sales	Exam	N/A	School 3	Bob T	06/19/24	Assigned/Not Started
03	2377	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
04	2378	Customer Service & Sales	Exam	N/A	School 3	Bob T	06/19/24	Assigned/Not Started
05	2379	Customer Service & Sales	Online Course	N/A	School 3	Bob T	06/19/24	Assigned/Not Started
06	2380	Customer Service & Sales	Exam	N/A	School 3	Bob T	06/19/24	Assigned/Not Started
07	2381	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
08	2382	Customer Service & Sales	Exam	N/A	School 3		06/19/24	
09	2383	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
10	2384	Customer Service & Sales	Exam	N/A	School 3		06/19/24	
11	2385	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
12	2386	Customer Service & Sales	Exam	N/A	School 3		06/19/24	
13	2387	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
14	2388	Customer Service & Sales	Exam	N/A	School 3		06/19/24	
15	2389	Customer Service & Sales	Online Course	N/A	School 3	JoJo M	06/19/24	Allocated/Unassigned
16	2390	Customer Service & Sales	Exam	N/A	School 3		06/19/24	

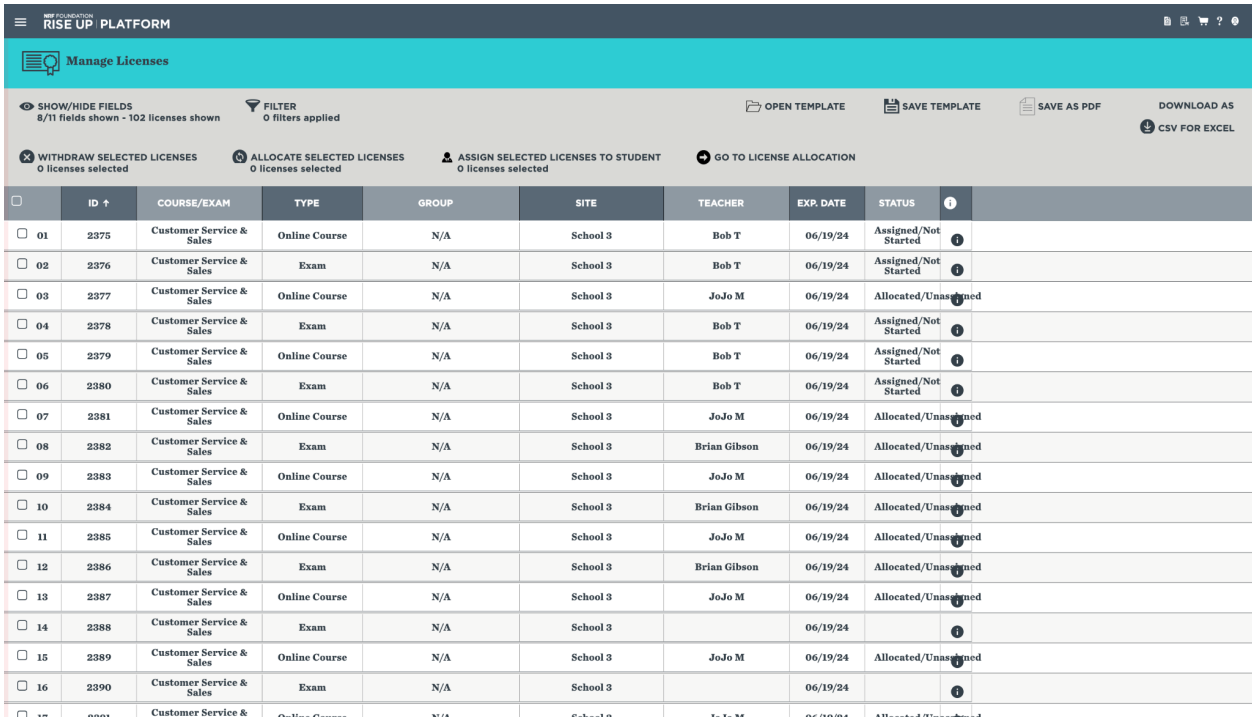
4. Select the teacher you'd like to allocate the licenses to from the drop-down menu. You can only allocate licenses to one recipient at a time, so if you want to allocate licenses to a different teacher, simply go back to the Manage Licenses page and repeat this process.





5. Click **ALLOCATE**. These licenses will be available to the recipient immediately, and they will still appear in your list on the Manage Licenses page in case you want to check their status or withdraw them.


RISE UP | PLATFORM
Manage Licenses
SHOW/HIDE FIELDS
8/11 fields shown - 102 licenses shown
FILTER
0 filters applied
OPEN TEMPLATE
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
WITHDRAW SELECTED LICENSES
3 licenses selected
ALLOCATE SELECTED LICENSES
ALLOCATE SELECTED LICENSES
Allocate 3
Selected Licenses to
Brian Gibson
CANCEL
ALLOCATE
5
ID
COURSE/EXAM
01 2375 Customer Service & Sales
02 2376 Customer Service & Sales
03 2377 Customer Service & Sales
04 2378 Customer Service & Sales
05 2379 Customer Service & Sales
06 2380 Customer Service & Sales
07 2381 Customer Service & Sales
08 2382 Customer Service & Sales
09 2383 Customer Service & Sales
10 2384 Customer Service & Sales
11 2385 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
12 2386 Customer Service & Sales Exam N/A School 3 06/19/24
13 2387 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
14 2388 Customer Service & Sales Exam N/A School 3 06/19/24
15 2389 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
16 2390 Customer Service & Sales Exam N/A School 3 06/19/24


RISE UP | PLATFORM
Manage Licenses
SHOW/HIDE FIELDS
8/11 fields shown - 102 licenses shown
FILTER
0 filters applied
OPEN TEMPLATE
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
WITHDRAW SELECTED LICENSES
0 licenses selected
ALLOCATE SELECTED LICENSES
0 licenses selected
ASSIGN SELECTED LICENSES TO STUDENT
0 licenses selected
GO TO LICENSE ALLOCATION
ID
COURSE/EXAM
TYPE
GROUP
SITE
TEACHER
EXP. DATE
STATUS
01 2375 Customer Service & Sales Online Course N/A School 3 Bob T 06/19/24 Assigned/Not Started
02 2376 Customer Service & Sales Exam N/A School 3 Bob T 06/19/24 Assigned/Not Started
03 2377 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
04 2378 Customer Service & Sales Exam N/A School 3 Bob T 06/19/24 Assigned/Not Started
05 2379 Customer Service & Sales Online Course N/A School 3 Bob T 06/19/24 Assigned/Not Started
06 2380 Customer Service & Sales Exam N/A School 3 Bob T 06/19/24 Assigned/Not Started
07 2381 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
08 2382 Customer Service & Sales Exam N/A School 3 Brian Gibson 06/19/24 Allocated/Unassigned
09 2383 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
10 2384 Customer Service & Sales Exam N/A School 3 Brian Gibson 06/19/24 Allocated/Unassigned
11 2385 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
12 2386 Customer Service & Sales Exam N/A School 3 Brian Gibson 06/19/24 Allocated/Unassigned
13 2387 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
14 2388 Customer Service & Sales Exam N/A School 3 06/19/24
15 2389 Customer Service & Sales Online Course N/A School 3 JoJo M 06/19/24 Allocated/Unassigned
16 2390 Customer Service & Sales Exam N/A School 3 06/19/24

Assigning Licenses to Students

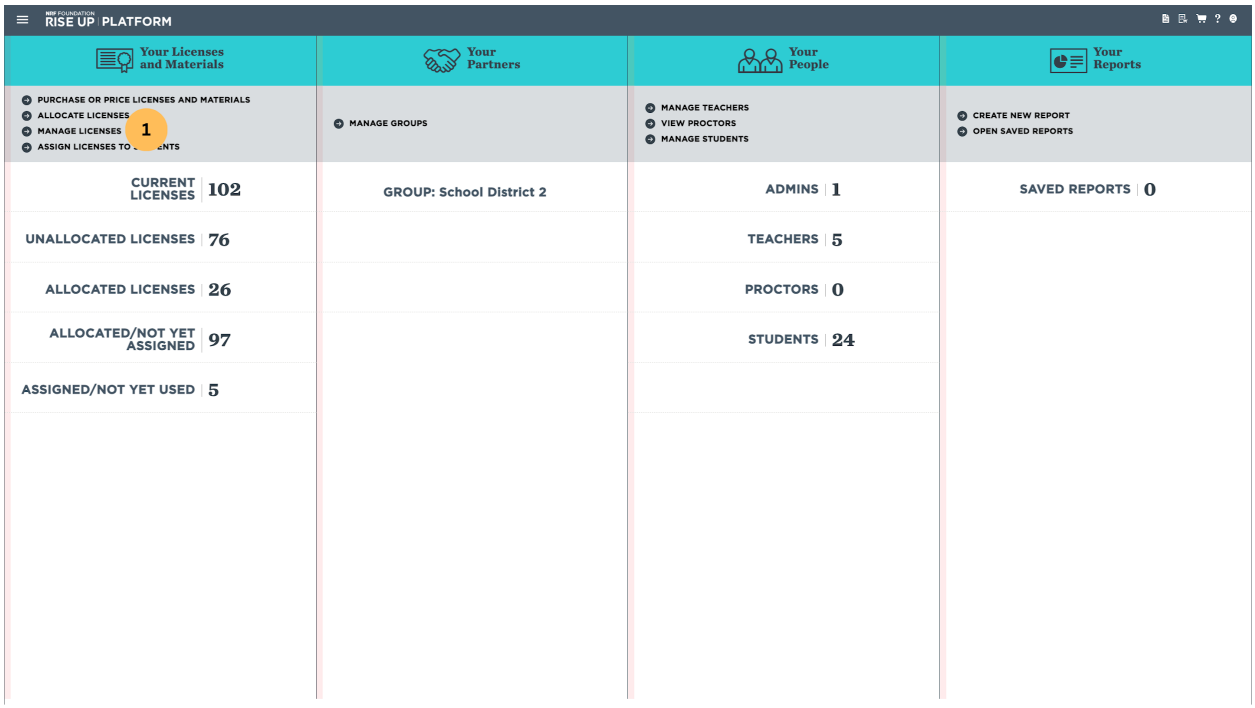
After licenses are purchased or allocated to you, you can assign them to your students. This allows them to access the courses and exams. You will be able to see the status of these licenses, and you can withdraw unused licenses from students if needed.

Assigning Licenses can be done in two ways:

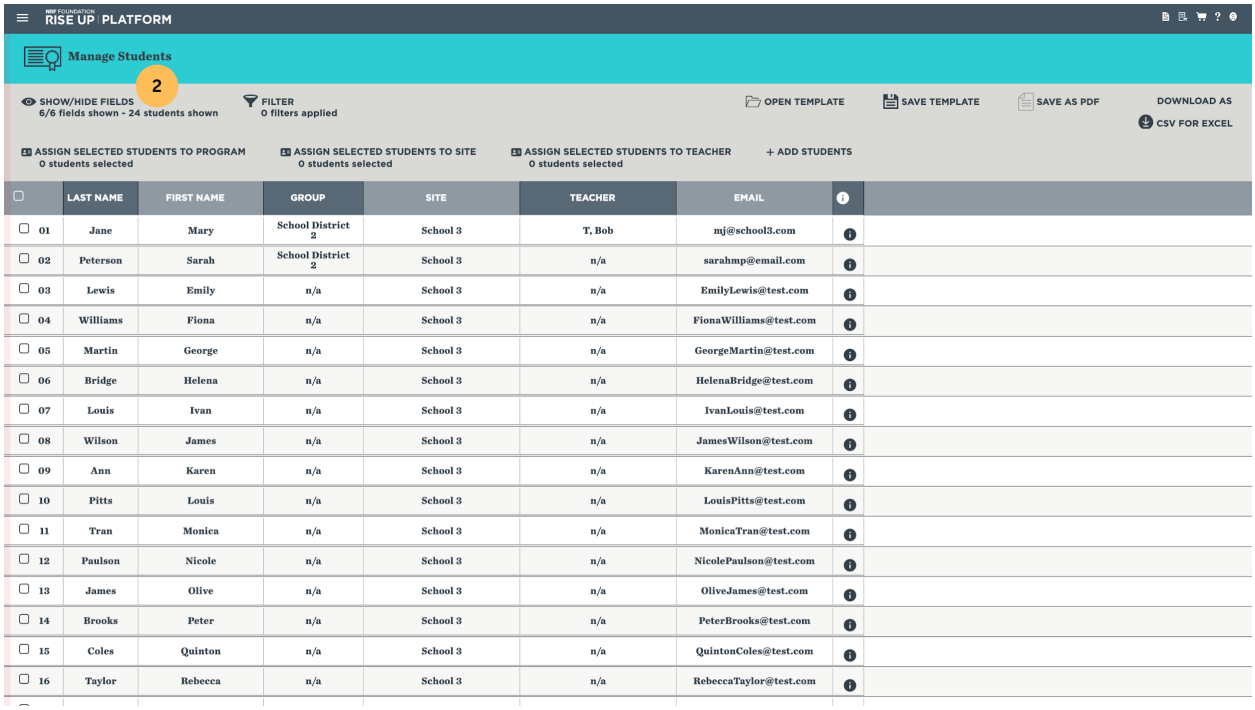
- You can select a specific license from the Manage Licenses page to assign to a student.
- You can select a student from the Manage Students list and assign them to a program (license).

To assign a specific license to a student:

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



2. On the Manage Licenses page, identify the license you'd like to assign to a student.

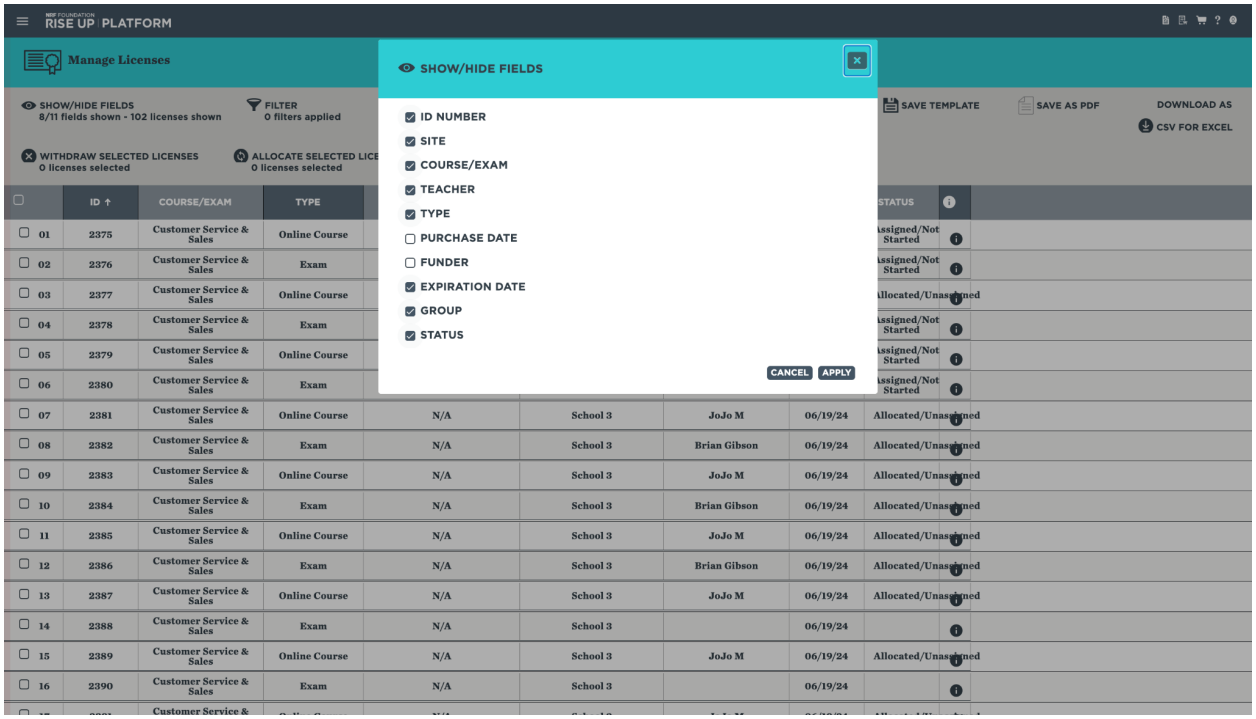


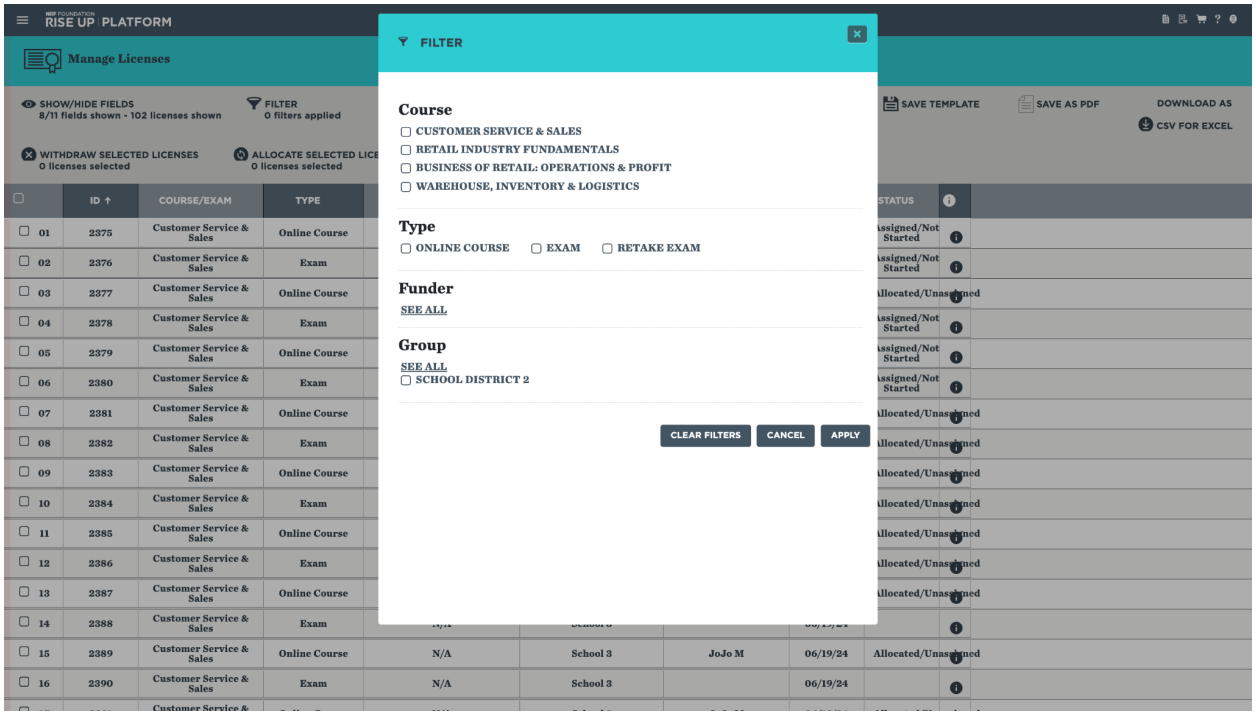
	LAST NAME	FIRST NAME	GROUP	SITE	TEACHER	EMAIL
01	Jane	Mary	School District 2	School 3	T, Bob	mj@school3.com
02	Peterson	Sarah	School District 2	School 3	n/a	sarahmp@email.com
03	Lewis	Emily	n/a	School 3	n/a	EmilyLewis@test.com
04	Williams	Fiona	n/a	School 3	n/a	FionaWilliams@test.com
05	Martin	George	n/a	School 3	n/a	GeorgeMartin@test.com
06	Bridge	Helena	n/a	School 3	n/a	HelenaBridge@test.com
07	Louis	Ivan	n/a	School 3	n/a	IvanLouis@test.com
08	Wilson	James	n/a	School 3	n/a	JamesWilson@test.com
09	Ann	Karen	n/a	School 3	n/a	KarenAnn@test.com
10	Pitts	Louis	n/a	School 3	n/a	LouisPitts@test.com
11	Tran	Monica	n/a	School 3	n/a	MonicaTran@test.com
12	Paulson	Nicole	n/a	School 3	n/a	NicolePaulson@test.com
13	James	Olive	n/a	School 3	n/a	OliveJames@test.com
14	Brooks	Peter	n/a	School 3	n/a	PeterBrooks@test.com
15	Coles	Quinton	n/a	School 3	n/a	QuintonColes@test.com
16	Taylor	Rebecca	n/a	School 3	n/a	RebeccaTaylor@test.com

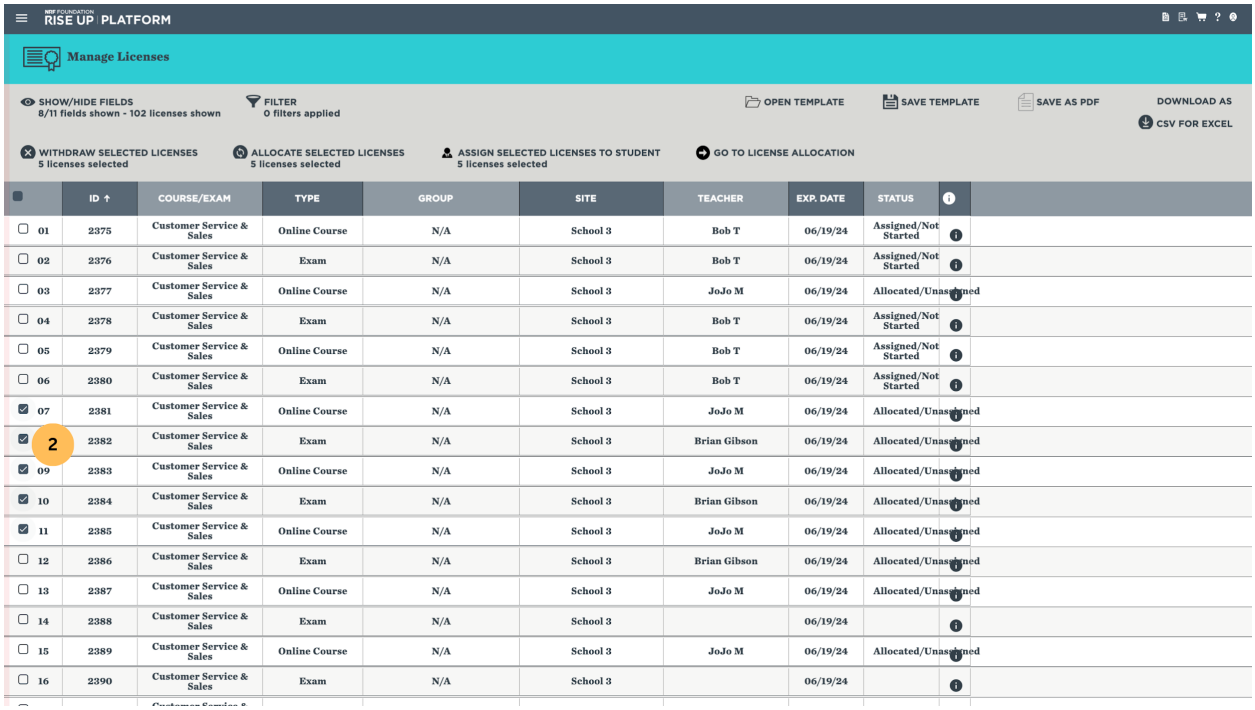
To help narrow down your search, you can:

- Use the **SHOW/HIDE FIELDS** feature to customize the amount of information displayed about each license, helping you determine which license students you want to assign licenses to the student;
- Use the **FILTER** feature to search for specific licenses based on criteria such as Program or Type; and
- Click on the column headings to sort the list of licenses.

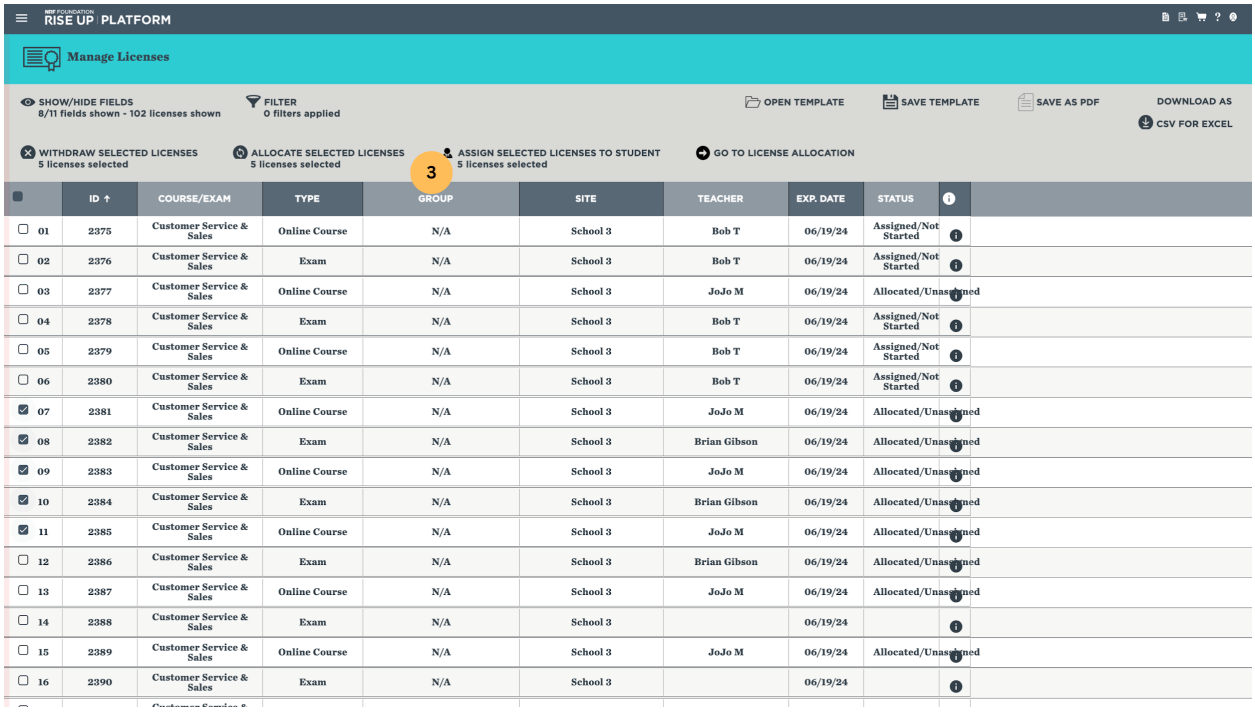
Click on the checkbox in the far left column for each student you wish to select. The number of students selected is displayed below **ASSIGN SELECTED LICENSES TO STUDENTS**.

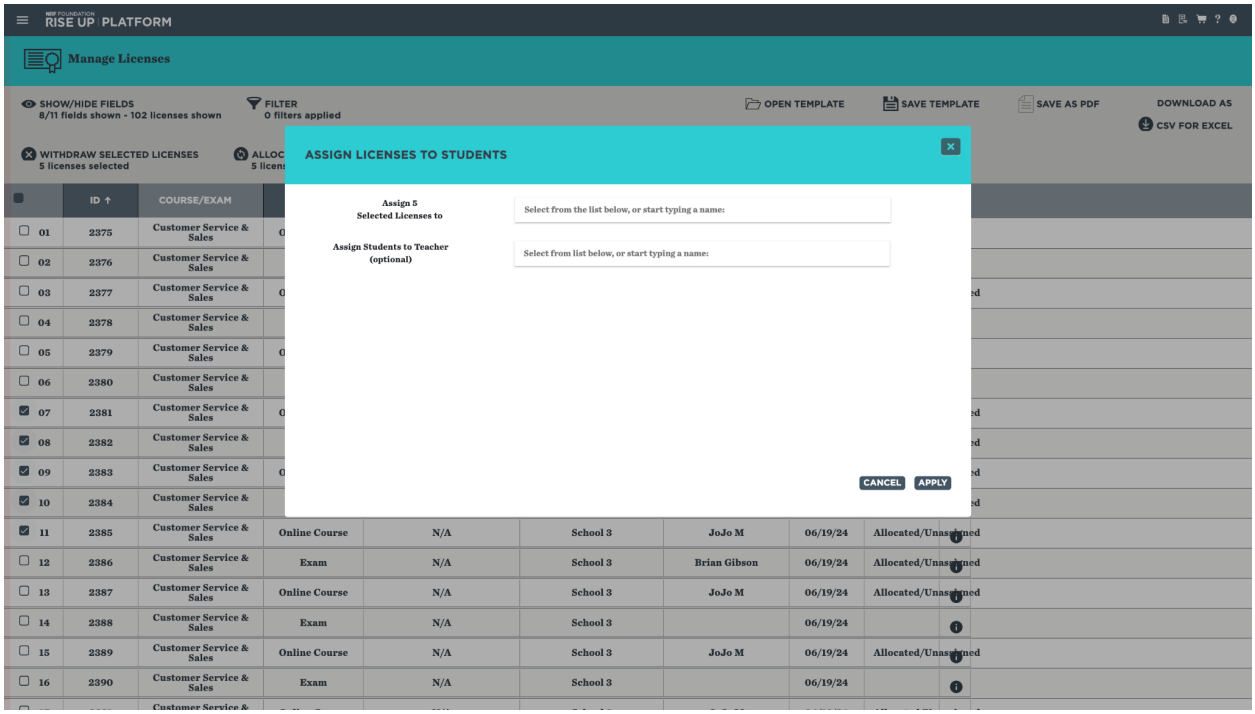

RISE UP PLATFORM
Manage Licenses
SHOW/HIDE FIELDS
8/11 fields shown - 102 licenses shown
FILTER
0 filters applied
WITHDRAW SELECTED LICENSES
0 licenses selected
ALLOCATE SELECTED LICE
0 licenses selected
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
SHOW/HIDE FIELDS
ID NUMBER
SITE
COURSE/EXAM
TEACHER
TYPE
PURCHASE DATE
FUNDER
EXPIRATION DATE
GROUP
STATUS
CANCEL
APPLY
ID
COURSE/EXAM
TYPE
STATUS


RISE UP PLATFORM
Manage Licenses
SHOW/HIDE FIELDS
8/11 fields shown - 102 licenses shown
FILTER
0 filters applied
WITHDRAW SELECTED LICENSES
0 licenses selected
ALLOCATE SELECTED LICE
0 licenses selected
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
FILTER
Course
CUSTOMER SERVICE & SALES
RETAIL INDUSTRY FUNDAMENTALS
BUSINESS OF RETAIL: OPERATIONS & PROFIT
WAREHOUSE, INVENTORY & LOGISTICS
Type
ONLINE COURSE
EXAM
RETAKE EXAM
Funder
SEE ALL
Group
SEE ALL
SCHOOL DISTRICT 2
CLEAR FILTERS
CANCEL
APPLY
ID
COURSE/EXAM
TYPE
STATUS

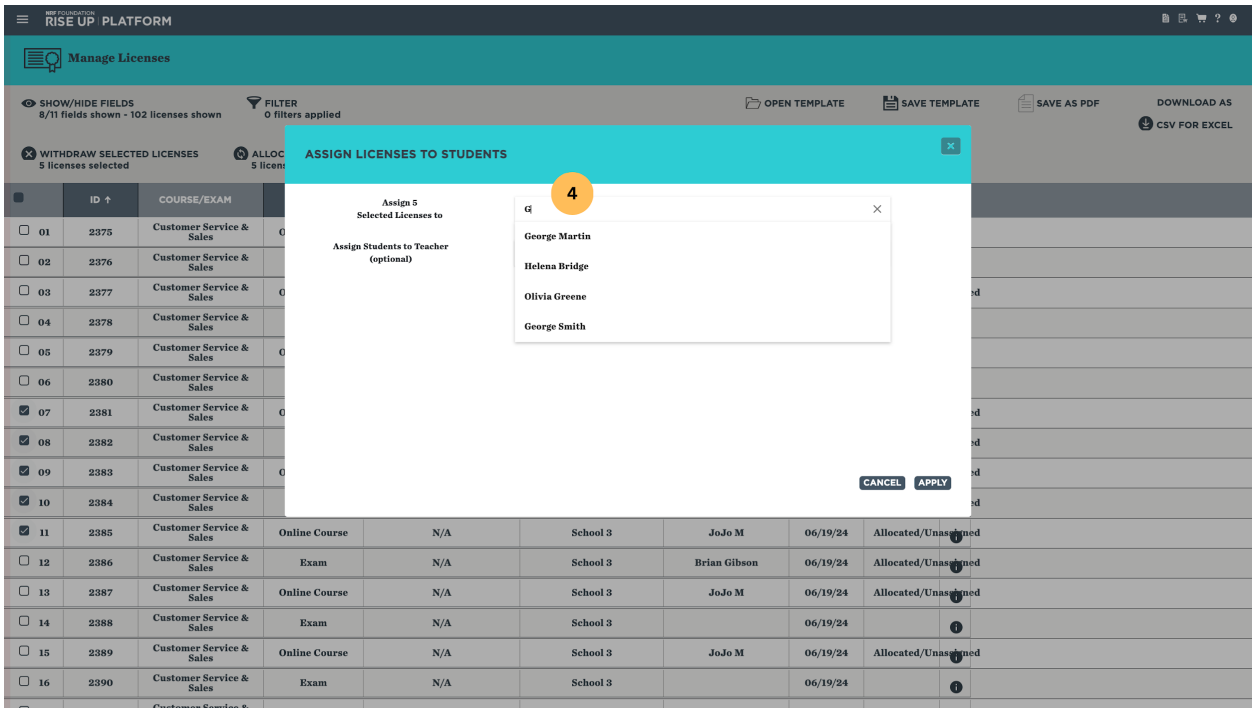


3. Click **ASSIGN SELECTED LICENSES TO STUDENTS**. A dialog box will appear showing the available students.

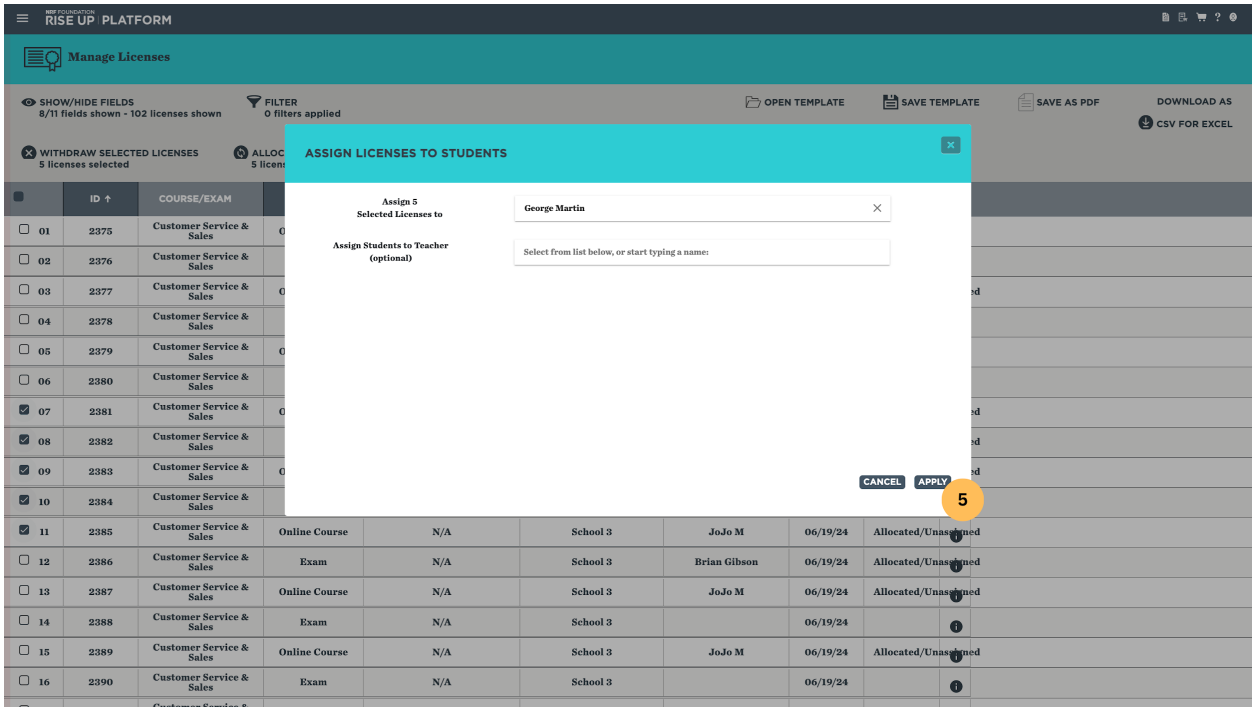




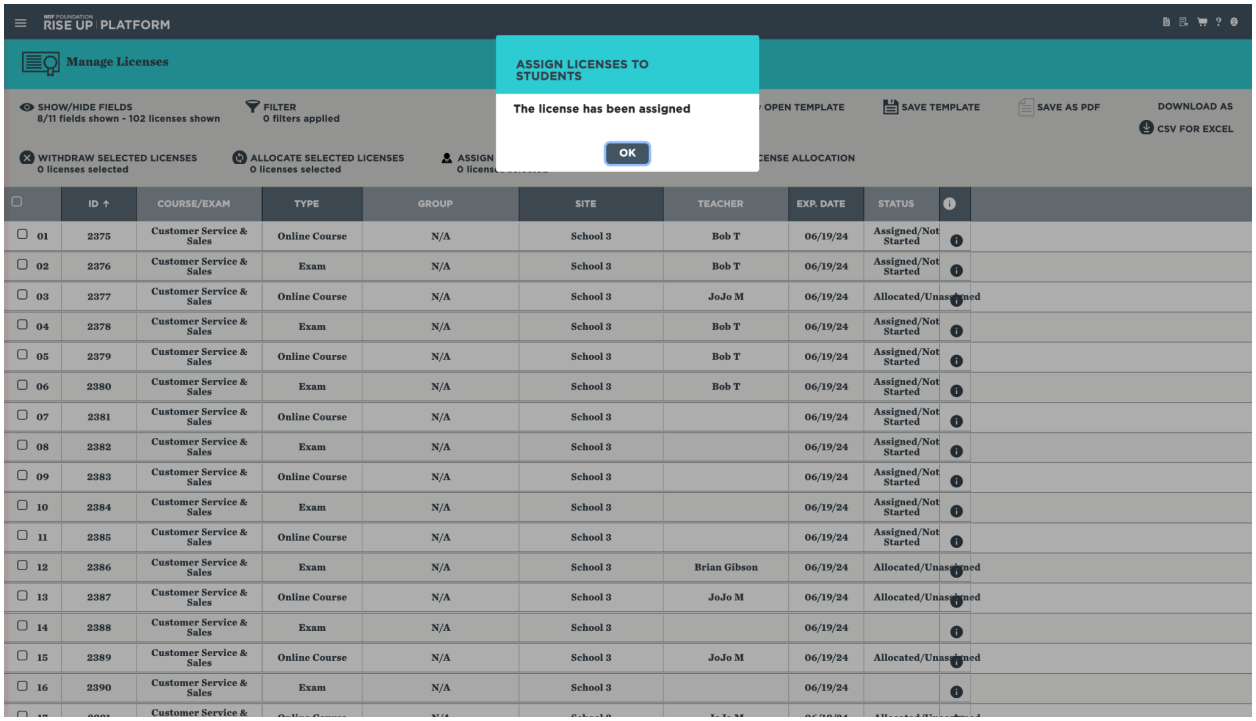
4. Select the student's name from the list, or start typing part of the student's name and then select it. Additionally, you have the option to assign students to teachers from this same dialog box. If you'd like to do this, select the teacher's name from the list, or start typing part of the teacher's name and then select it.



5. Click **APPLY**.

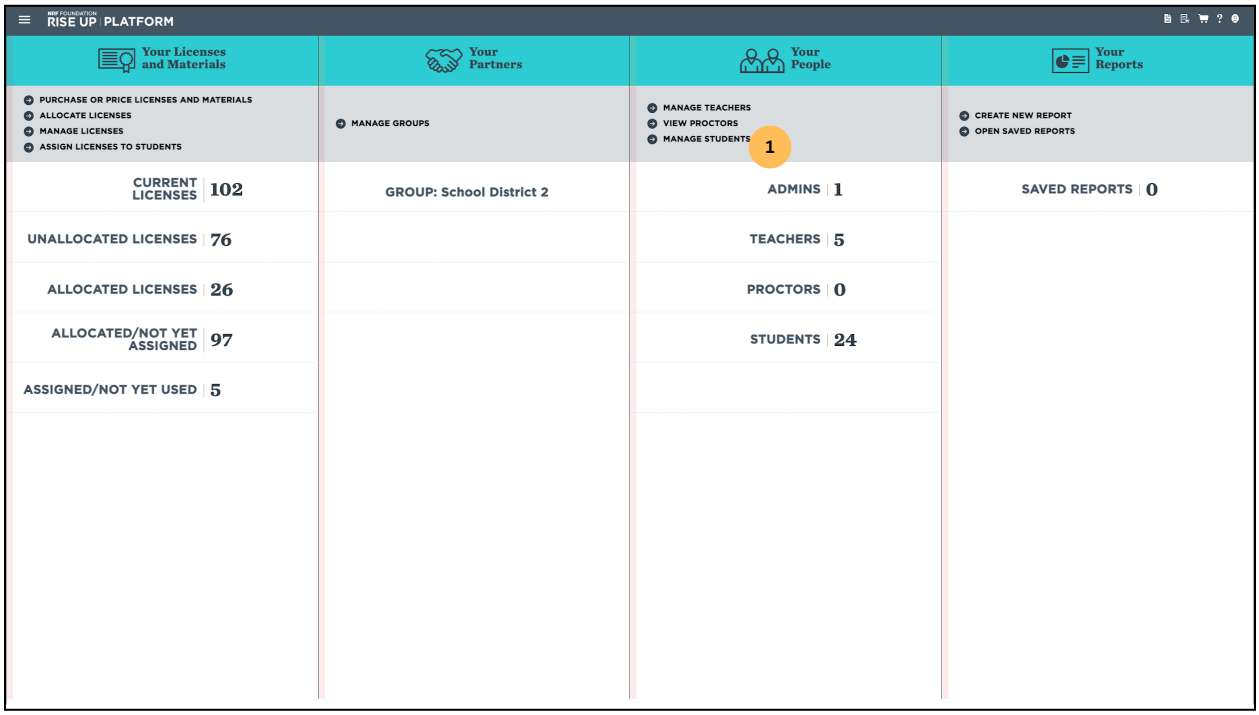


6. A dialog box confirming that the licenses have been successfully assigned to a student or students will appear. Click **OK** to return to the Manage License page. The license will be immediately available for the student.



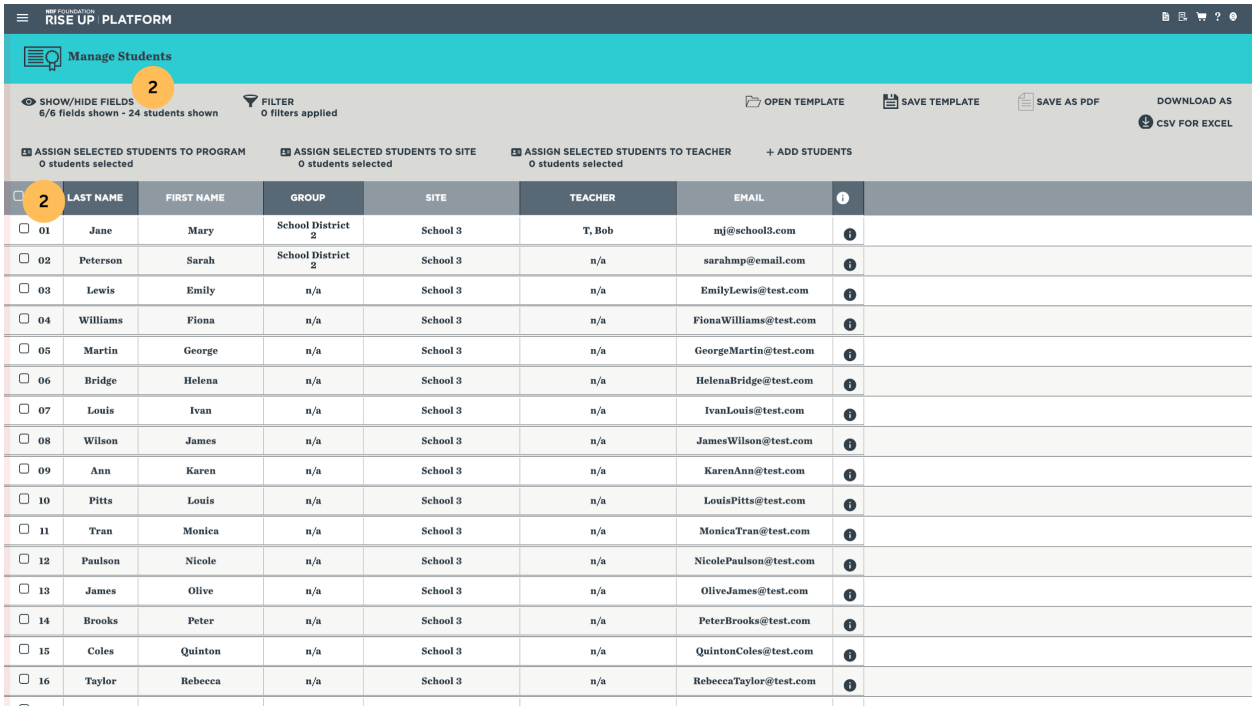
To assign a student to a program (license):

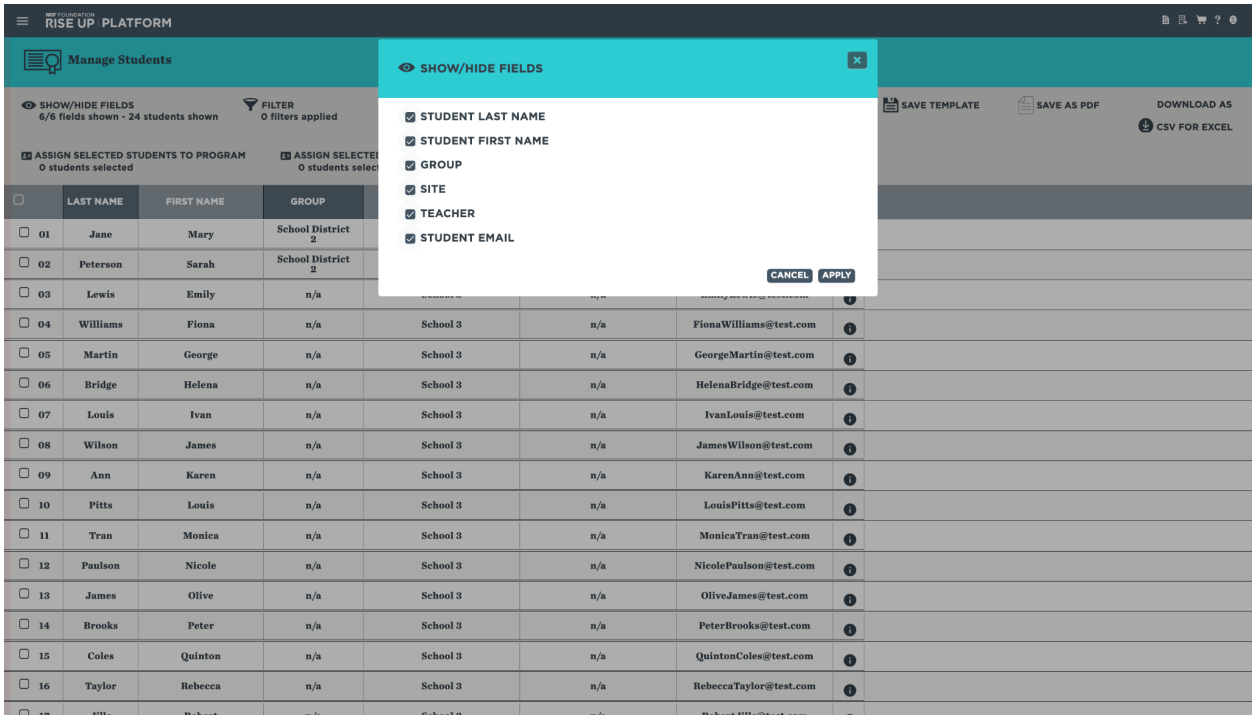
1. Click **MANAGE STUDENTS** on the dashboard, or select it from the menu in the upper-left corner.



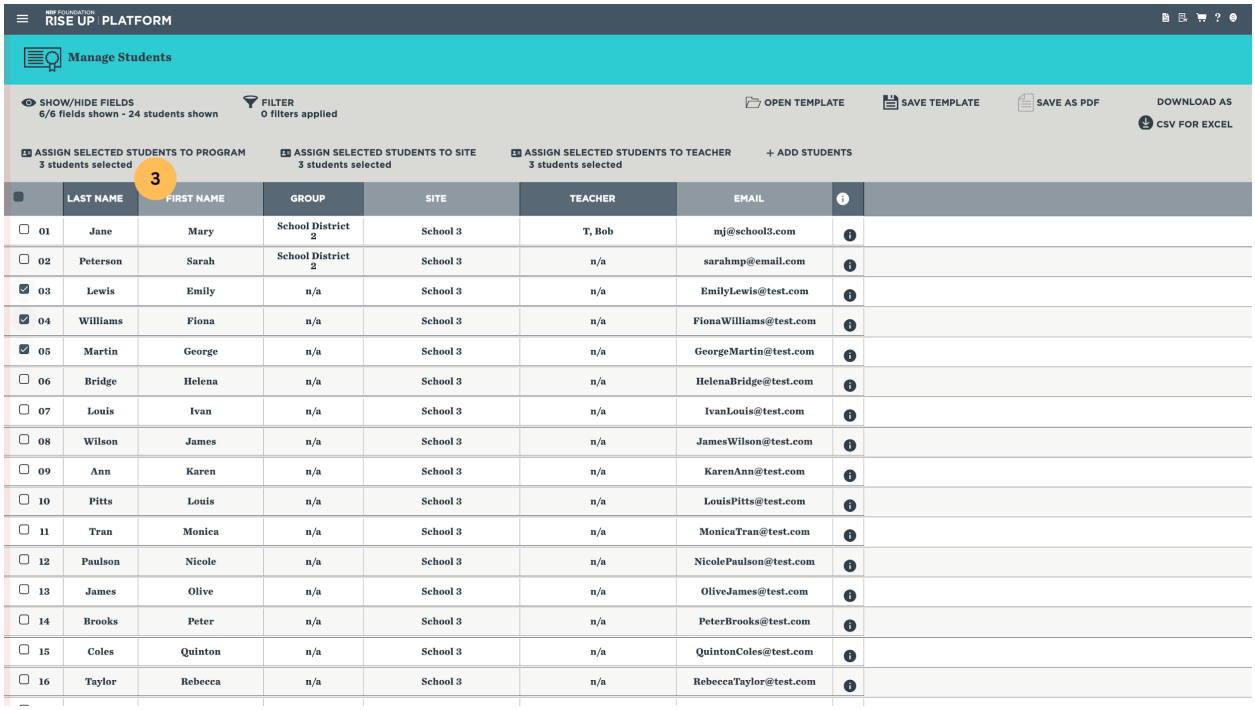
2. On the Manage Students page, identify one or more students to whom you'd like to assign a program (license). To help narrow down your search, you can:
    - Use the **SHOW/HIDE FIELDS** feature to customize the amount of information displayed about each student, helping you determine which students you want to assign licenses to;
    - Use the **FILTER** feature to search for specific students based on criteria such as Course or Group; and
    - Click on the column headings to sort the list of students.

    Click on the checkbox in the far left column for each student you wish to select. The number of students selected is displayed below **ASSIGN SELECTED STUDENTS TO PROGRAM**.



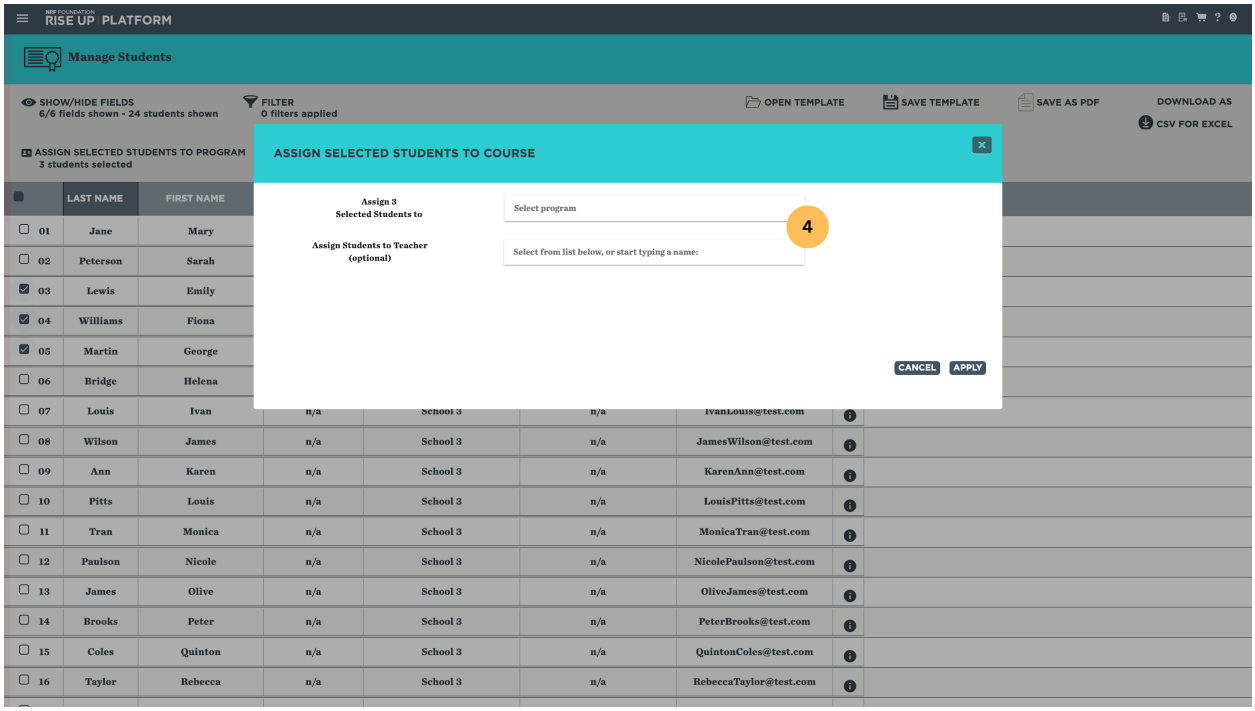


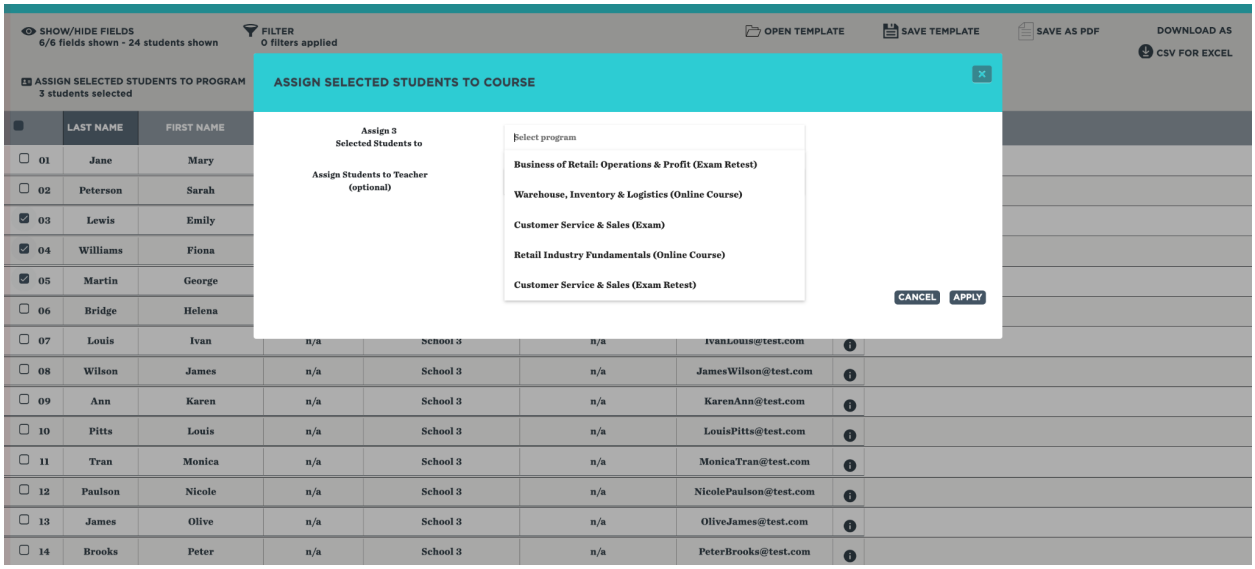
3. Click **ASSIGN SELECTED STUDENTS TO PROGRAM**. A dialog box will appear showing the available programs. Note that you can only assign students to one program (license) at a time.



4. Select the program (license) you want from the list.

Additionally, you have the option to assign students to teachers from this same dialog box. If you'd like to do this, select the teacher's name from the list, or start typing part of the teacher's name and then select it.



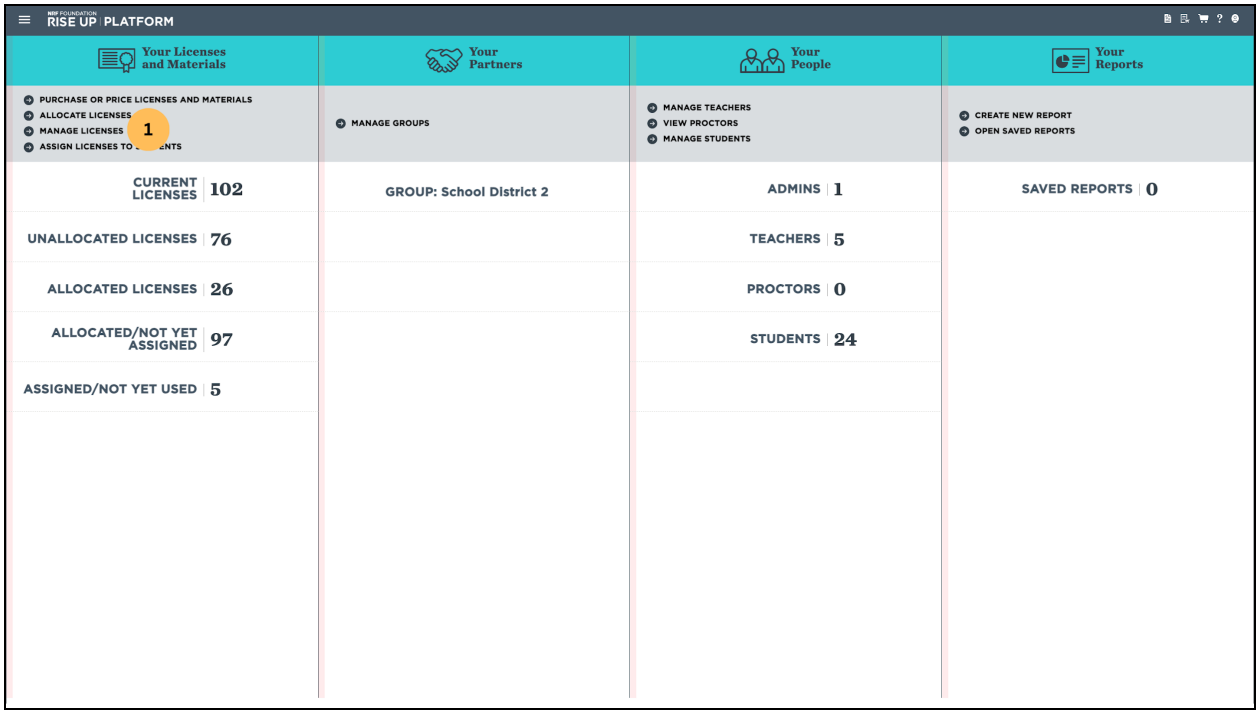


5. A dialog box confirming that the students have been successfully assigned to a program will appear. Click **OK** to return to the Manage Students page. The programs will be immediately available for the student.

Withdrawing Licenses

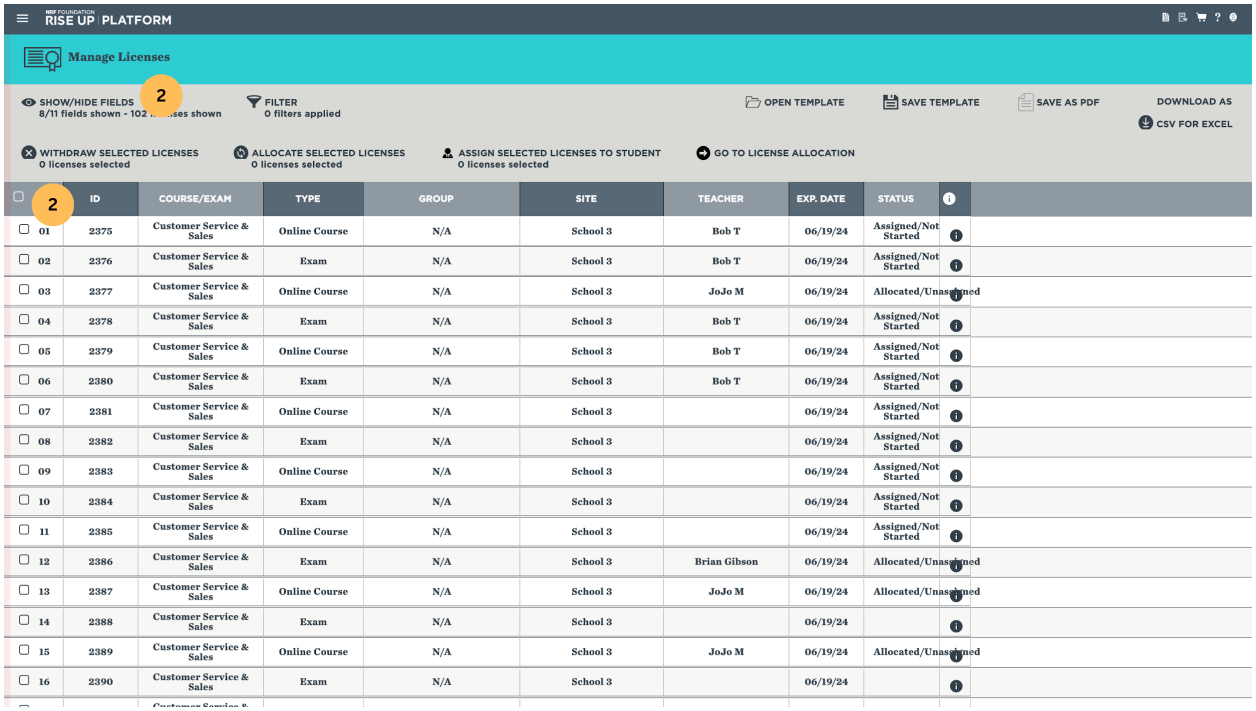
If you want to take back an unused license from someone you allocated it to, you can withdraw it from the Manage Licenses page.

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.

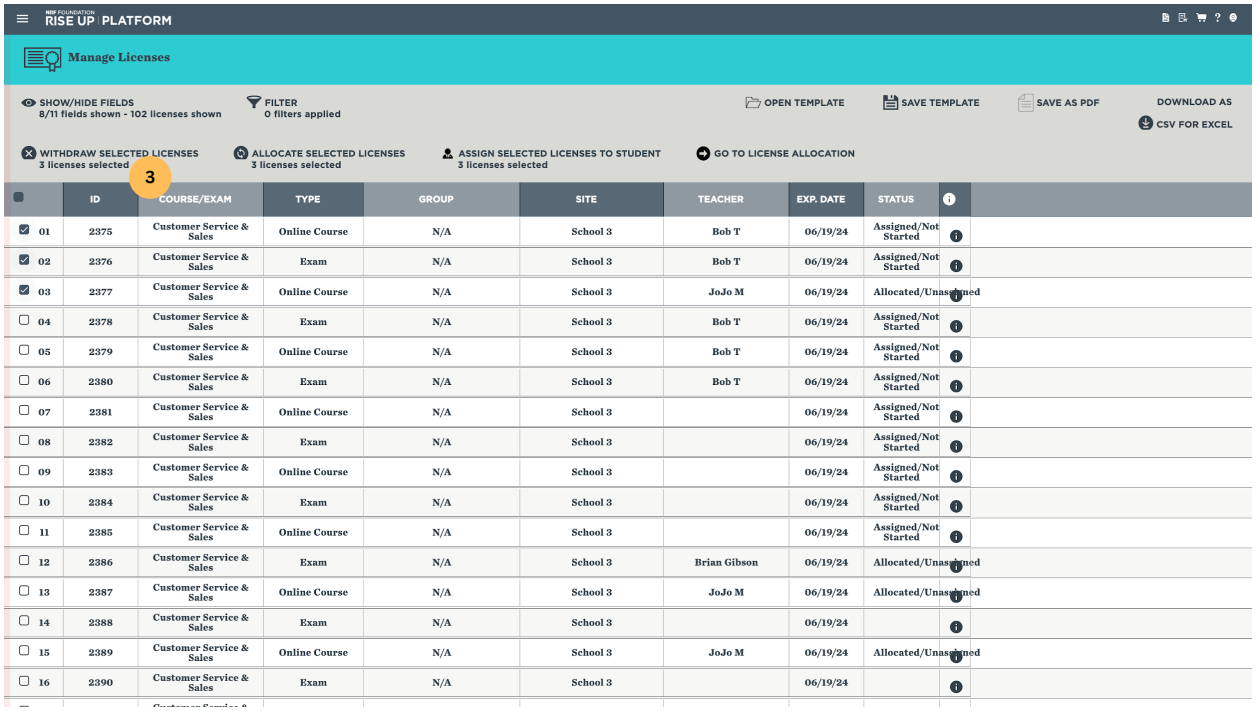


2. On the Manage Licenses page, click on the checkboxes on the far left of each license you wish to withdraw. To help you find the licenses, you can:
    - Use the **SHOW/HIDE FIELDS** feature to see more or less about each license;
    - Use **FILTER** to help narrow down the list of licenses; and
    - Click on the column headings to sort the list of licenses.

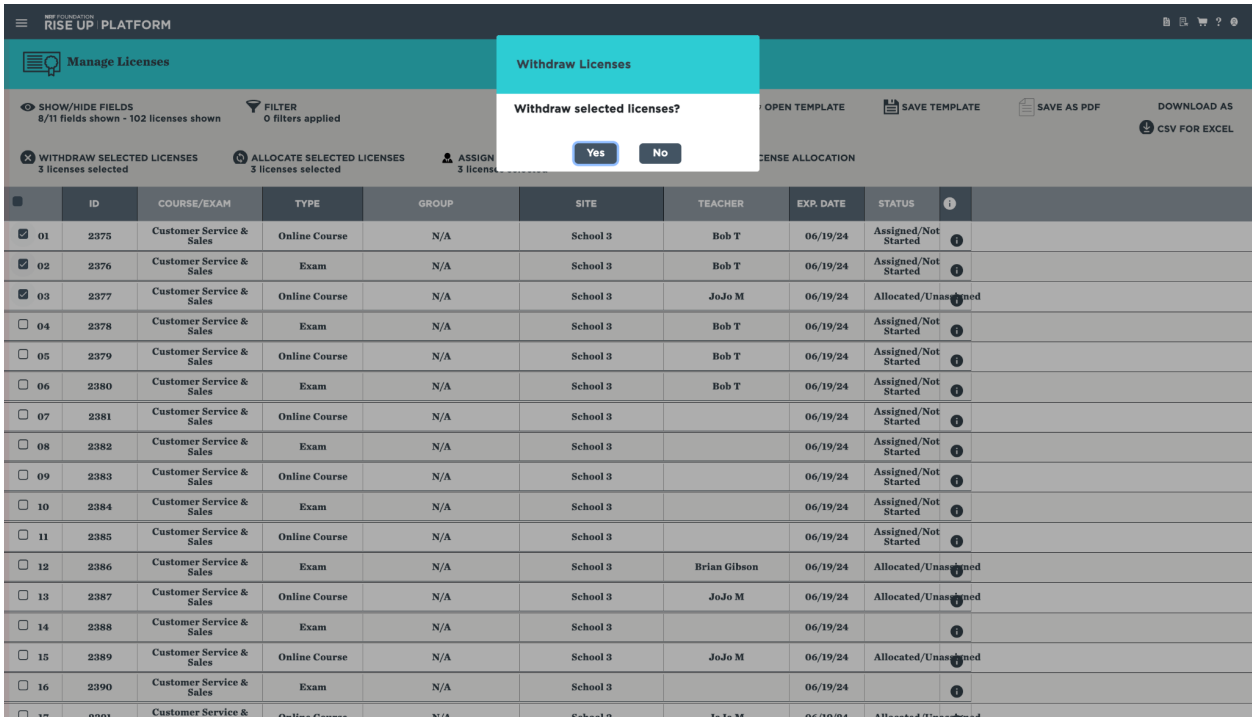
    Click the checkbox in the far left column for each license you wish to select.



3. Click **WITHDRAW SELECTED LICENSES**. The number of licenses selected is displayed as the subtext below.



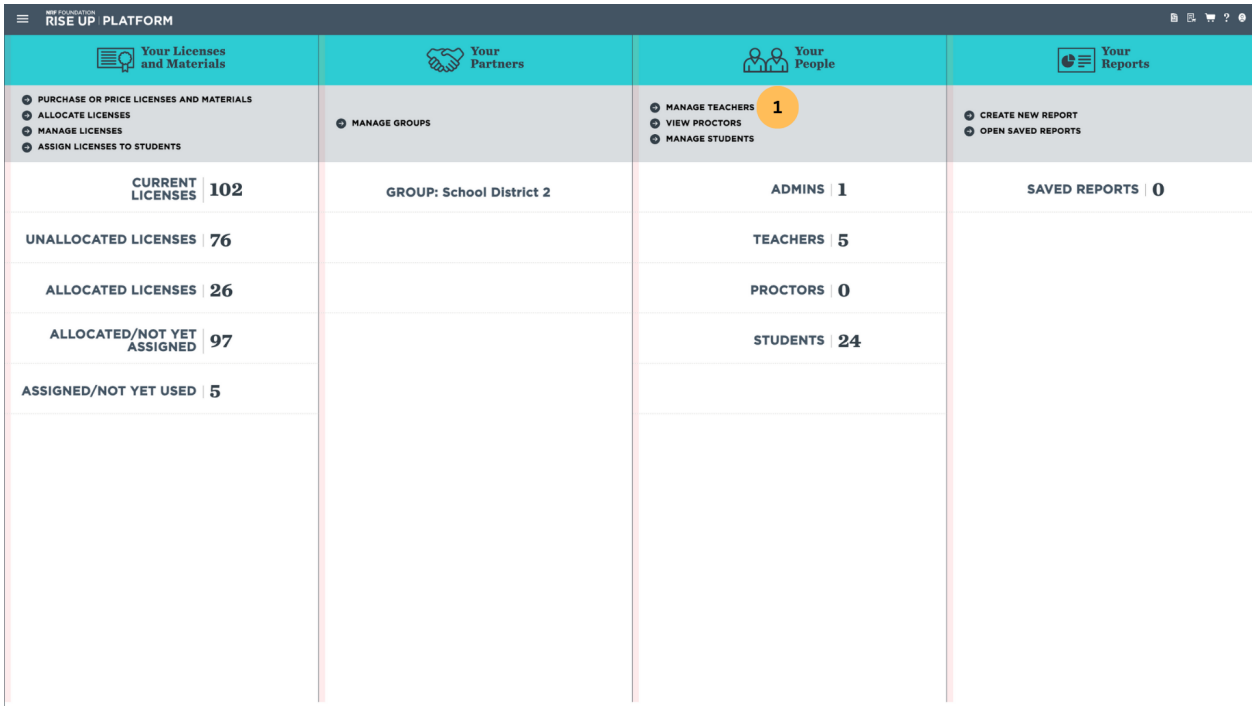
4. A dialog box asking if you want to withdraw the selected licenses will appear. Click **YES** to confirm. These licenses will return to your pool of unallocated licenses.

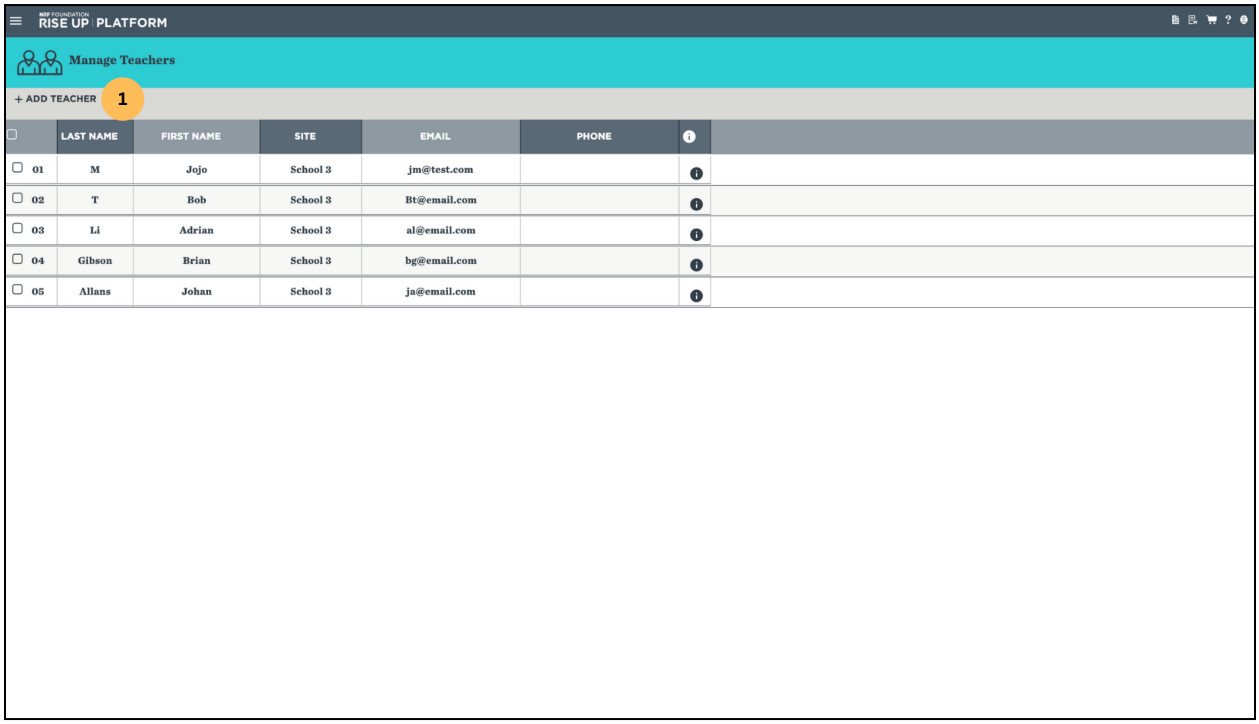


Adding Teachers to Your Site

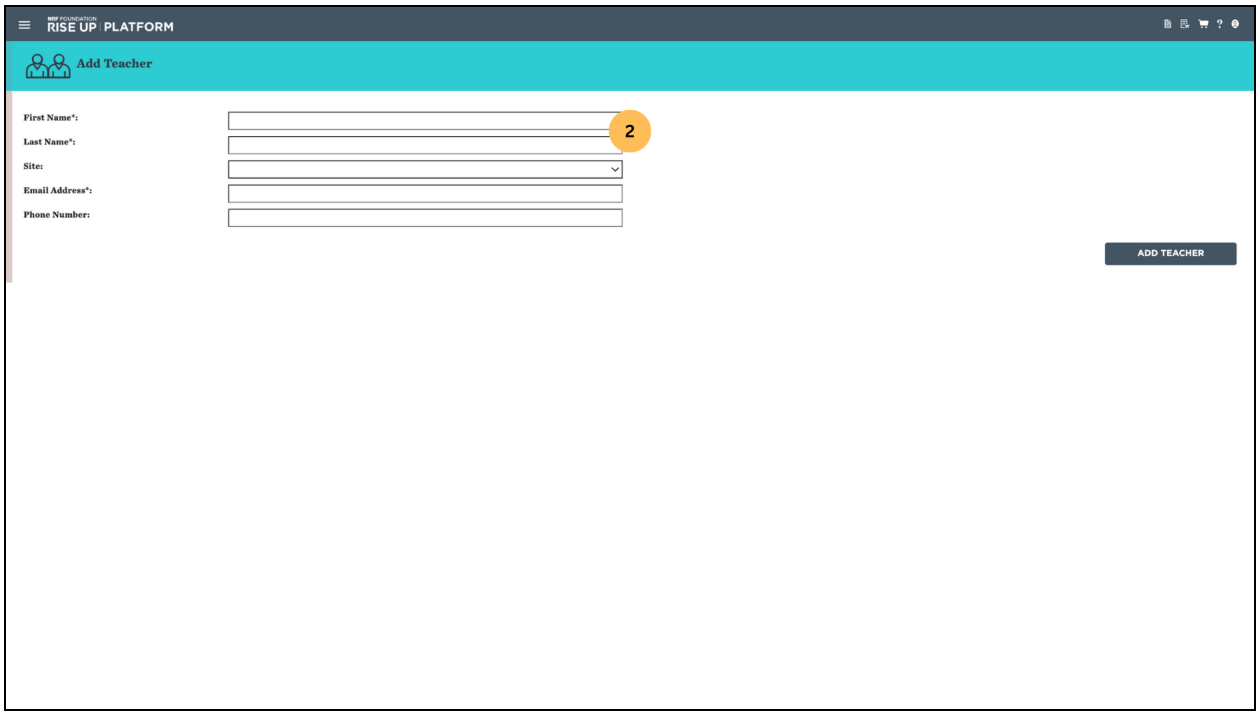
You can add teachers to your site. This will let you do things like allocate licenses to them, assign students to them, and assign licenses to their students. Teachers can also be connected to you by your group, if you are connected to one.

1. Click **Add Teacher** from the upper left hand menu or go to the Manage Teachers page and click **Add Teacher** from that page.

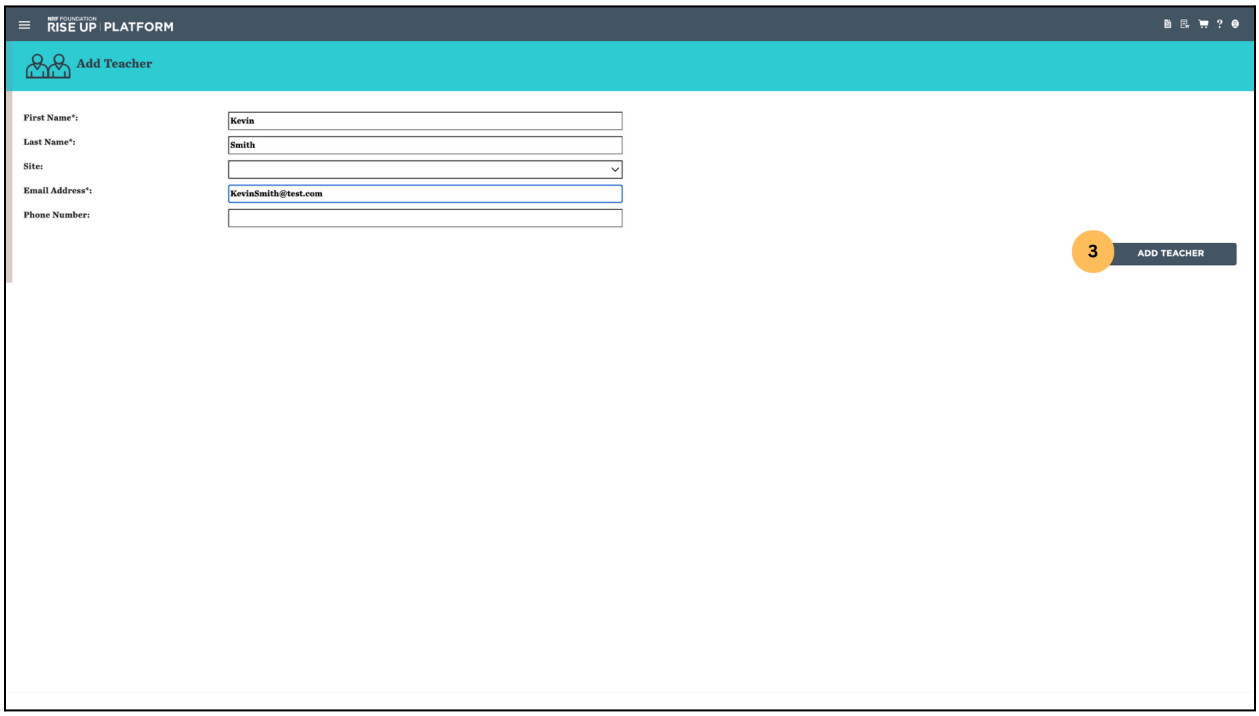


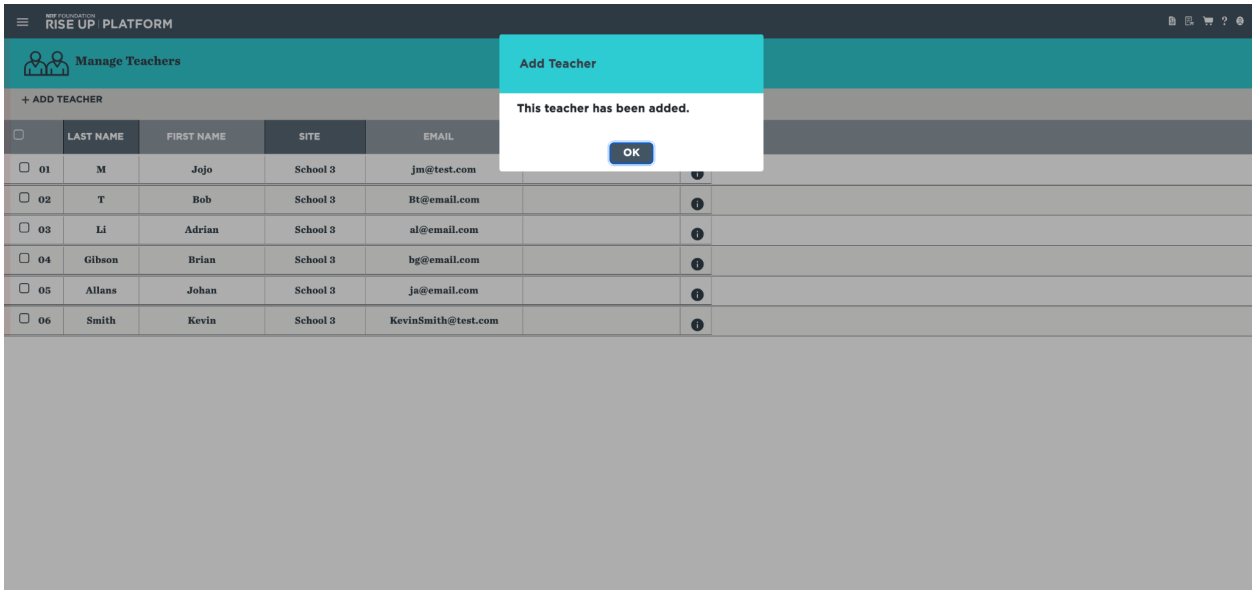


2. Enter the Teacher's name and contact information.



3. Click **ADD TEACHER**. You will be able to allocate licenses and assign students to the new teacher immediately. The contact you listed will receive an email with a link to complete the registration process.





Adding Students

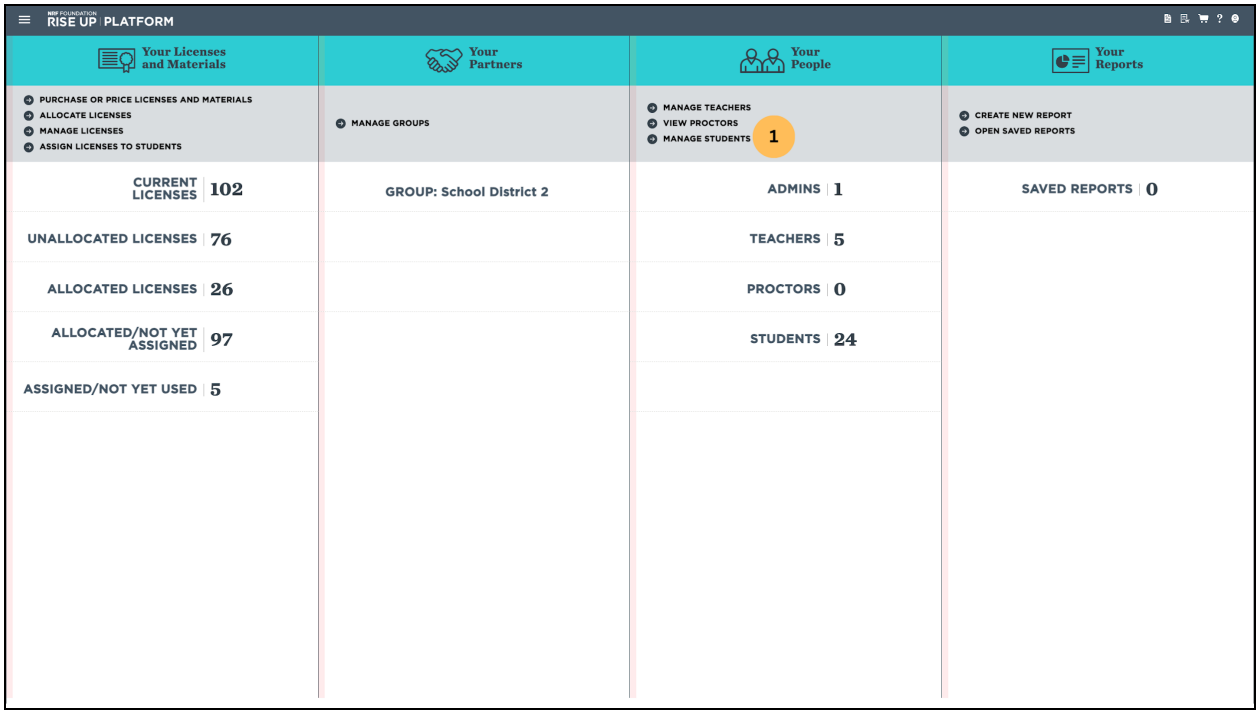
When you add a student, they will be connected to your site, which will allow you to assign programs to them, assign them to teachers, and track their progress. They will automatically be connected to your group as well, if you are connected to one.

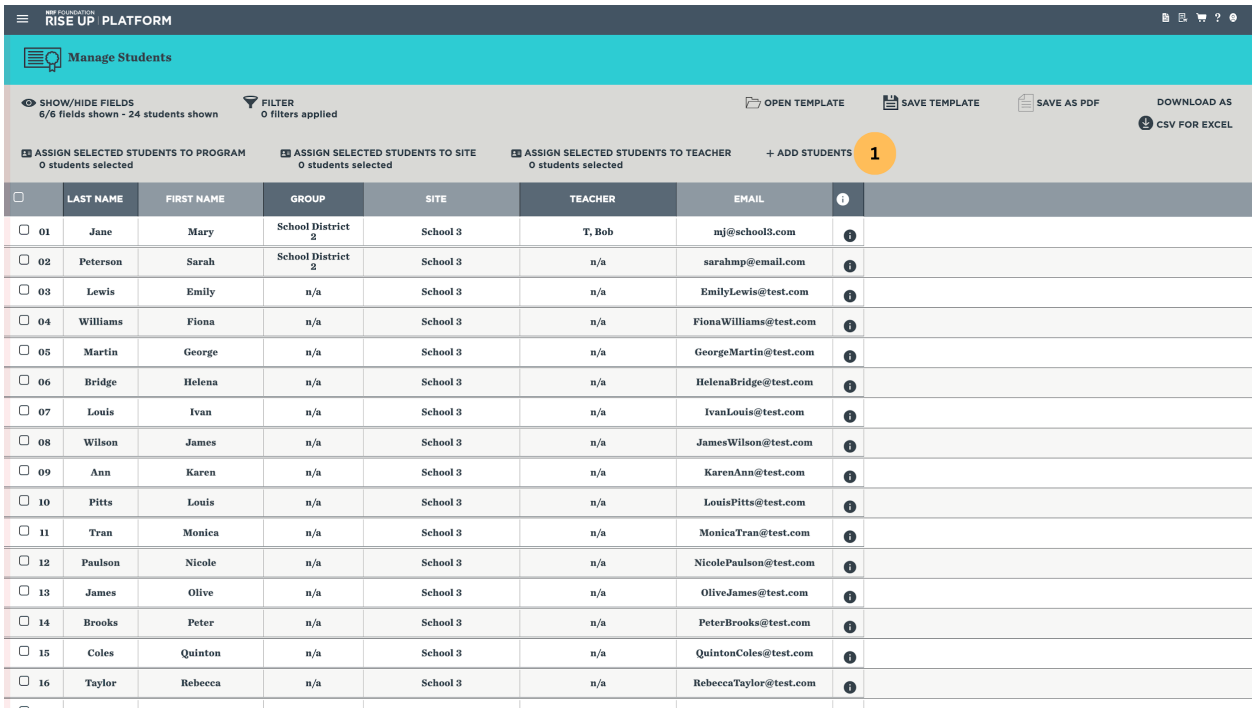
You can add students one by one, or you can add a batch of students at once.

Before you add a new student, you might want to check to make sure they aren't already part of your site, either because someone added them to the site directly or because they were added by your site or a teacher who is connected to your site. To see a list of all the students connected to your group, open the Manage Students page on the dashboard or from the menu in the upper-left corner.

To add a single student:

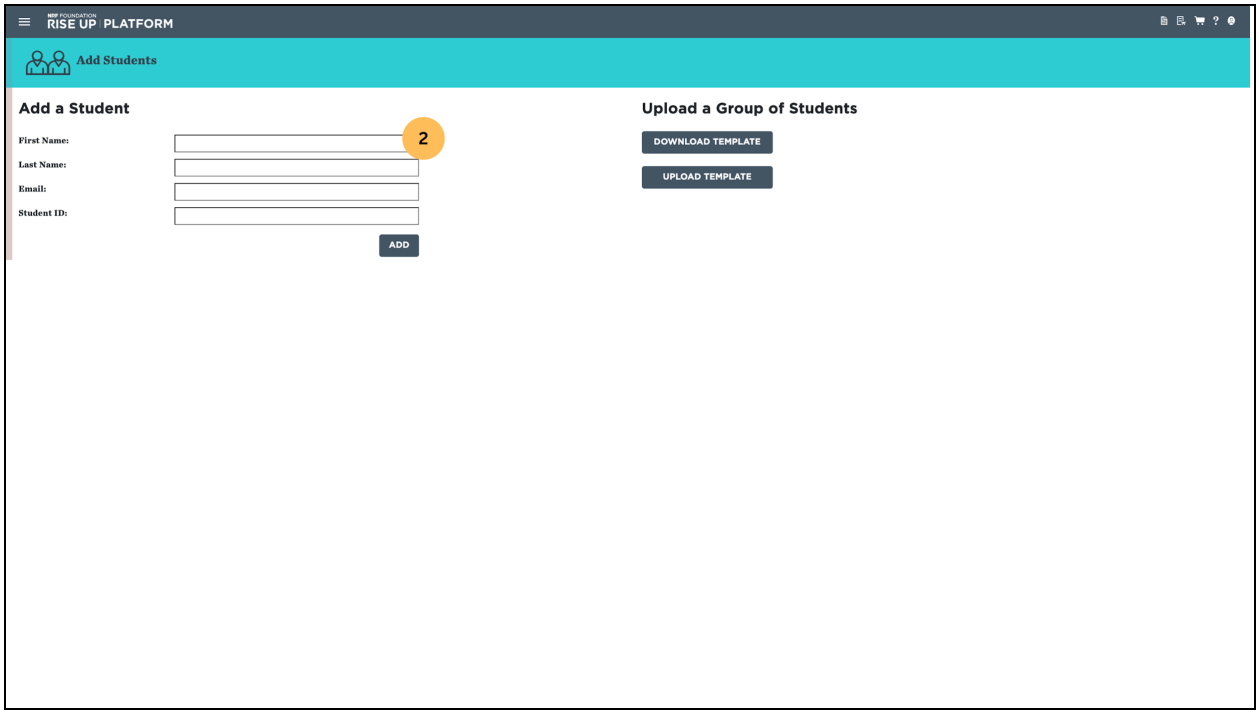
1. Click **ADD STUDENTS** on the Manage Students page, or select it from the menu in the upper-left corner.



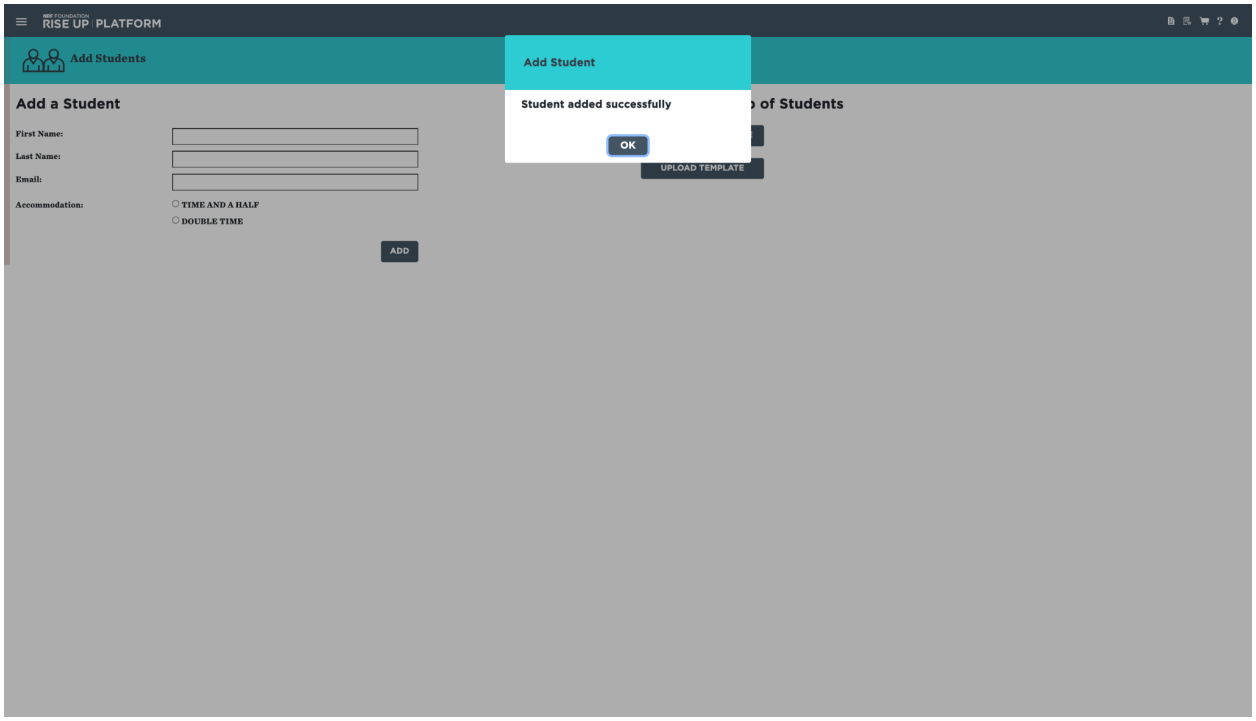


2. Enter the student's name and email. You can also enter a student ID for your own tracking purposes.

3. Click **ADD** to add the student to your list.

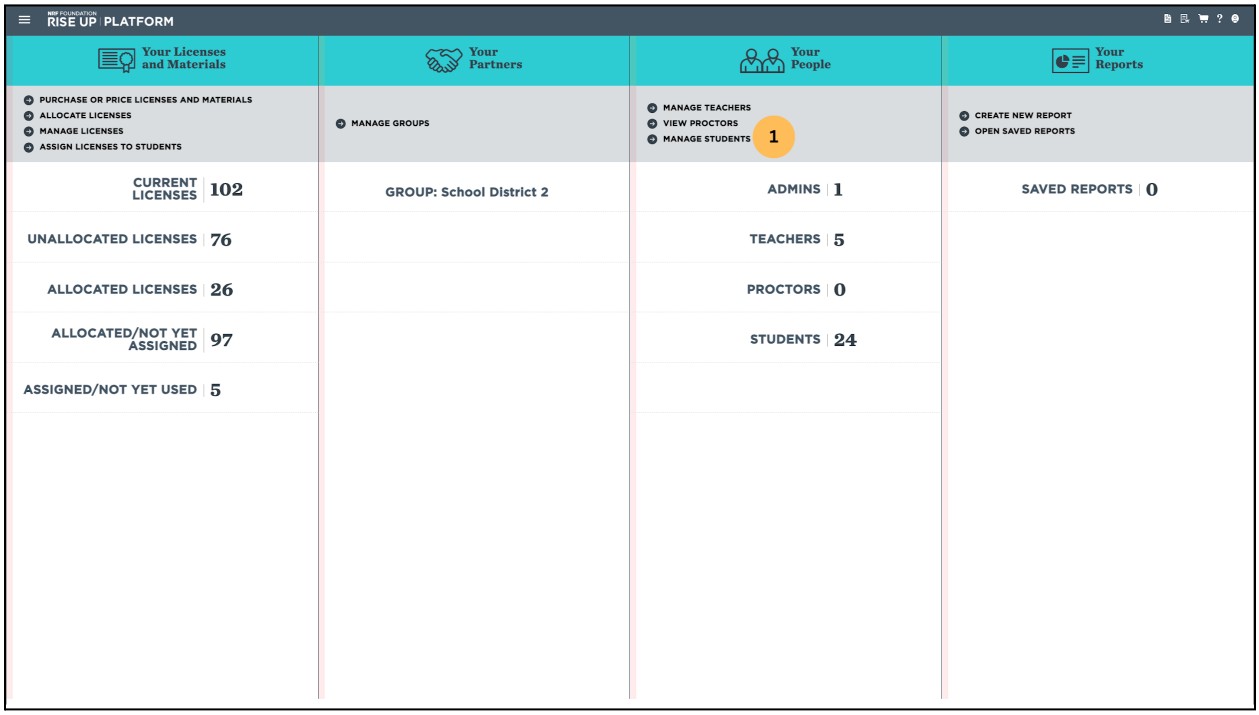


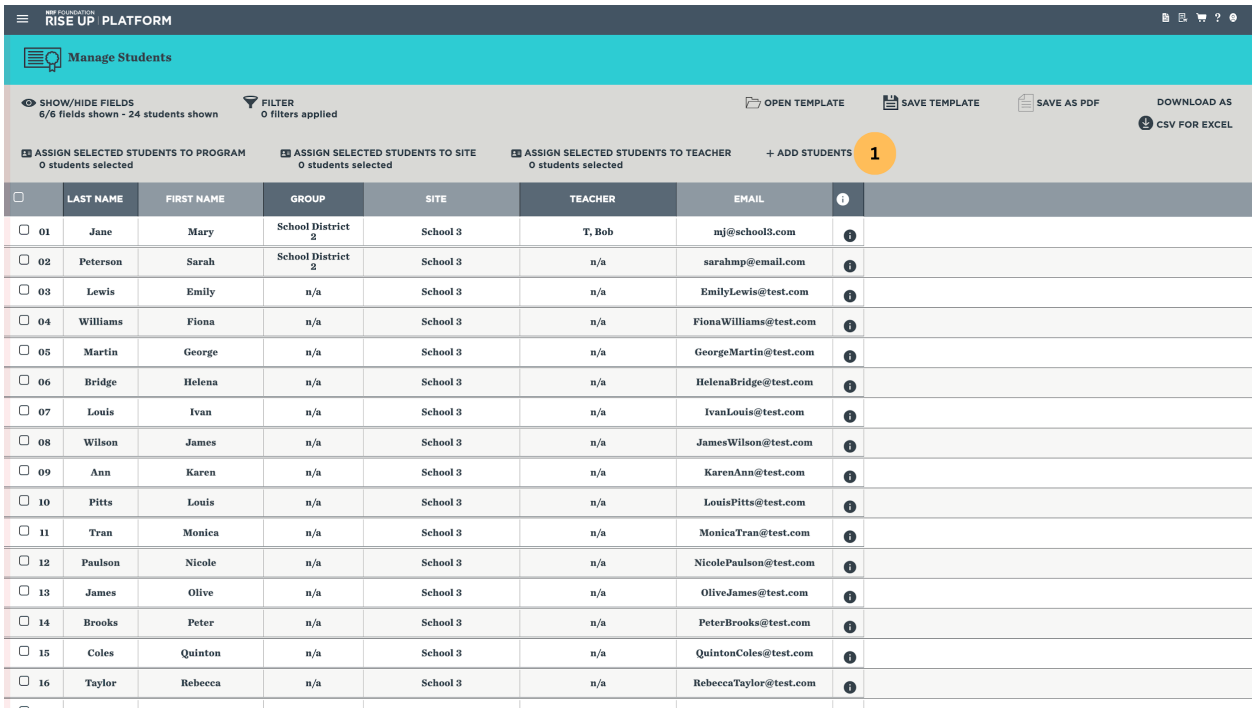
4. A dialog box confirming that the student has been successfully added will appear. Click **OK** to return to the Add Students page. You will be able to assign programs to the student or assign them to a teacher immediately. The student will receive an email with a link to complete the registration process.



To add a group of students at once:

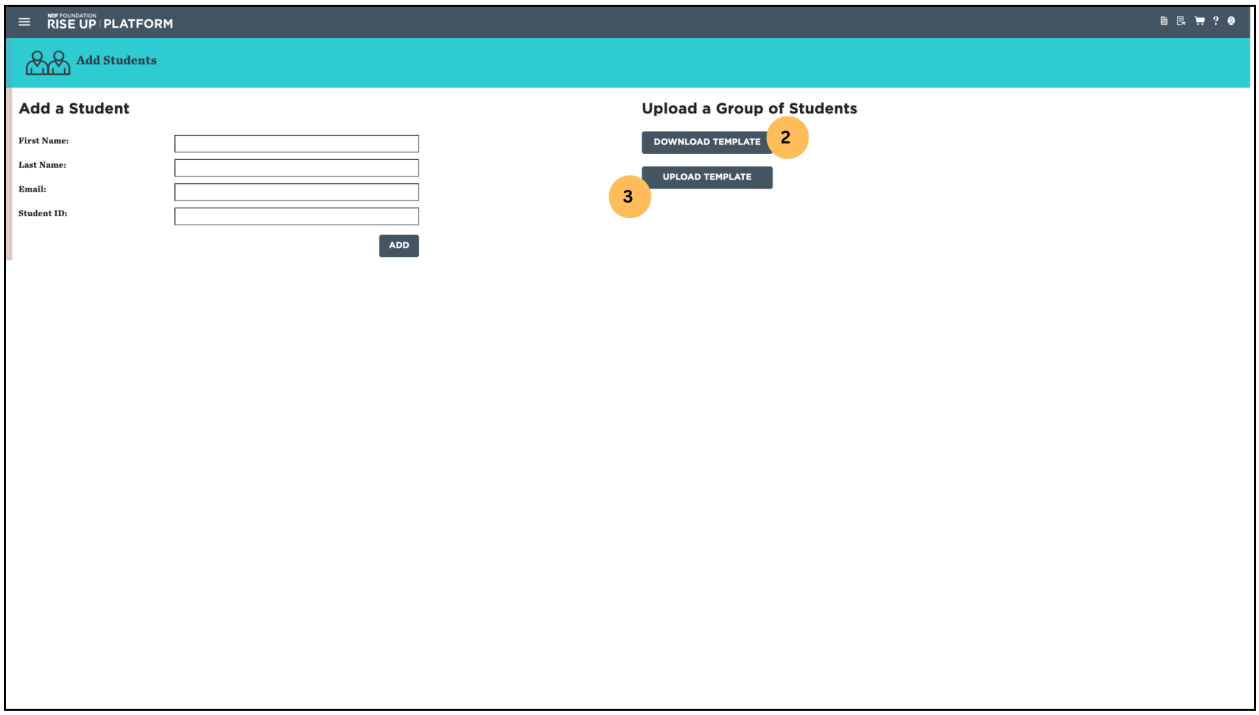
1. Click **ADD STUDENTS** on the Manage Students page, or select it from the menu in the upper-left corner.



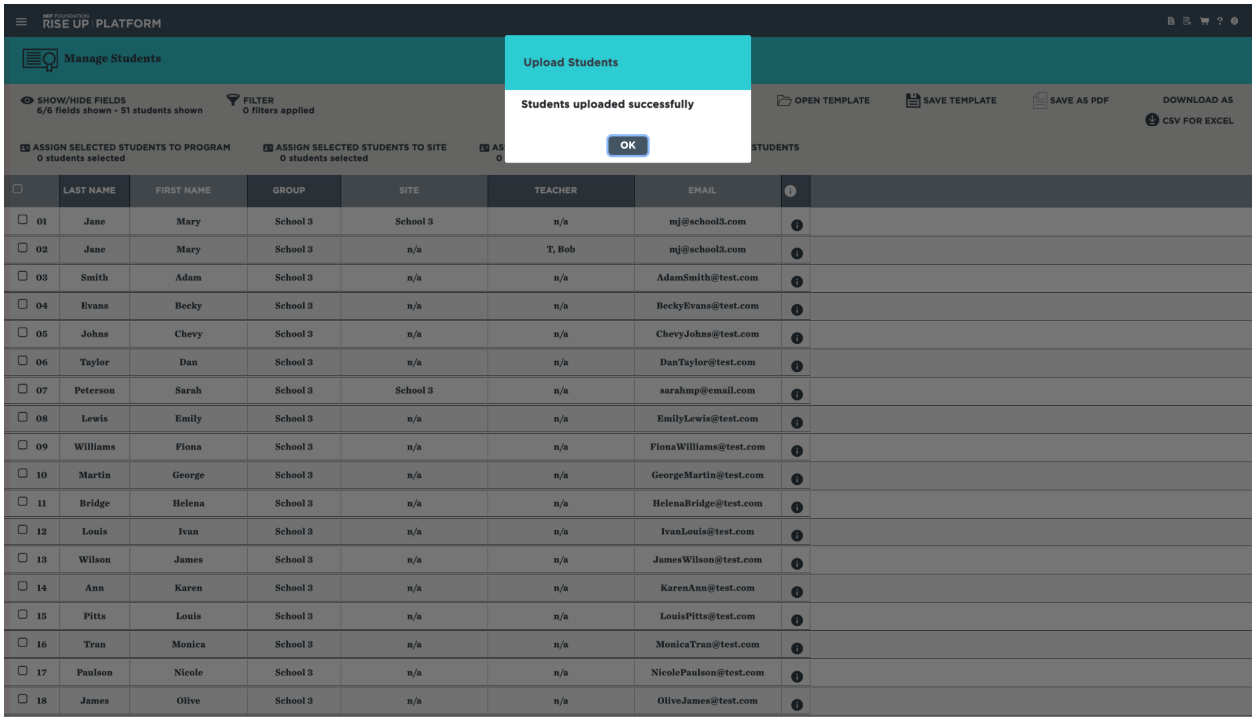


2. On the Add Students Page, click **DOWNLOAD TEMPLATE** to download the student enrollment CSV template. Open the downloaded template, which includes columns of the student's emails, first names, and last names. You can also add student IDs for your own tracking purposes. Enter your students' data following the format provided in the template. Make sure not to rename the columns in the template.

3. Once you've finished adding your students' information to the template, save the CSV file. On the Add Students page, click **UPLOAD TEMPLATE** to upload the CSV with the student information to the database.



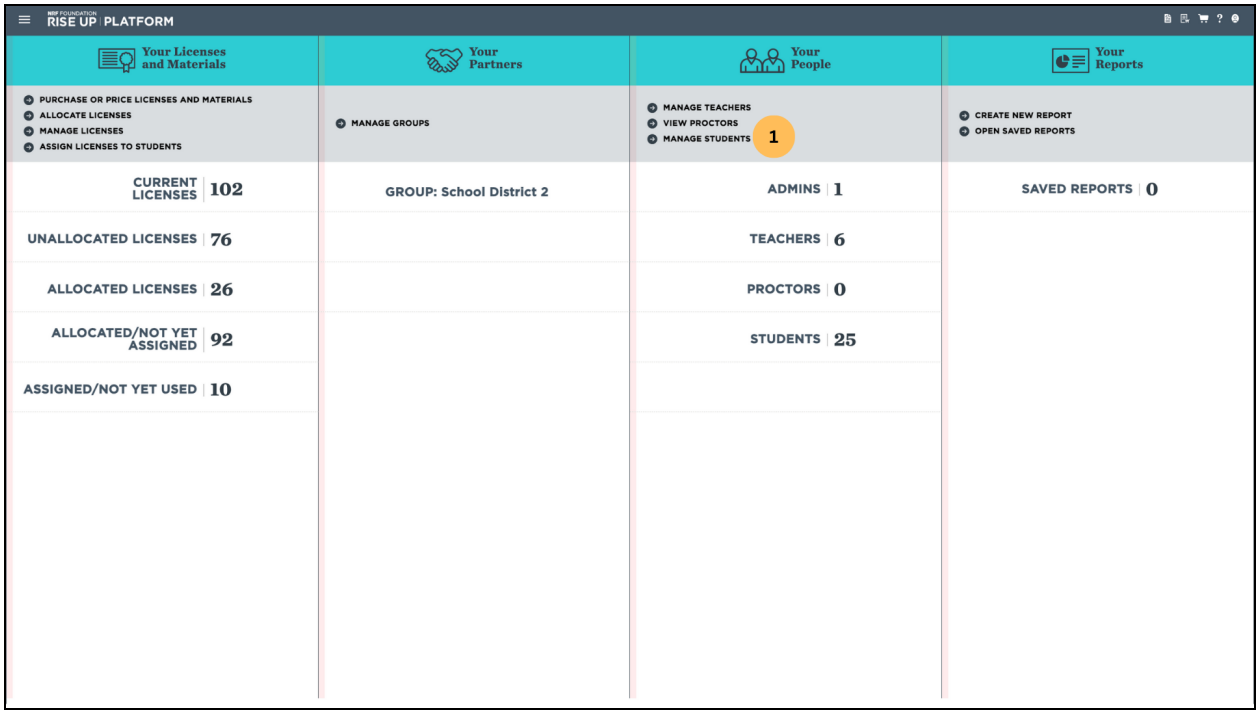
4. After you've selected the CSV, a dialog box confirming that the students have been successfully added will appear. Click **OK** to return to the Manage Students page. You will be able to assign programs to the student or assign them to a teacher immediately. The student will receive an email with a link to complete the registration process.



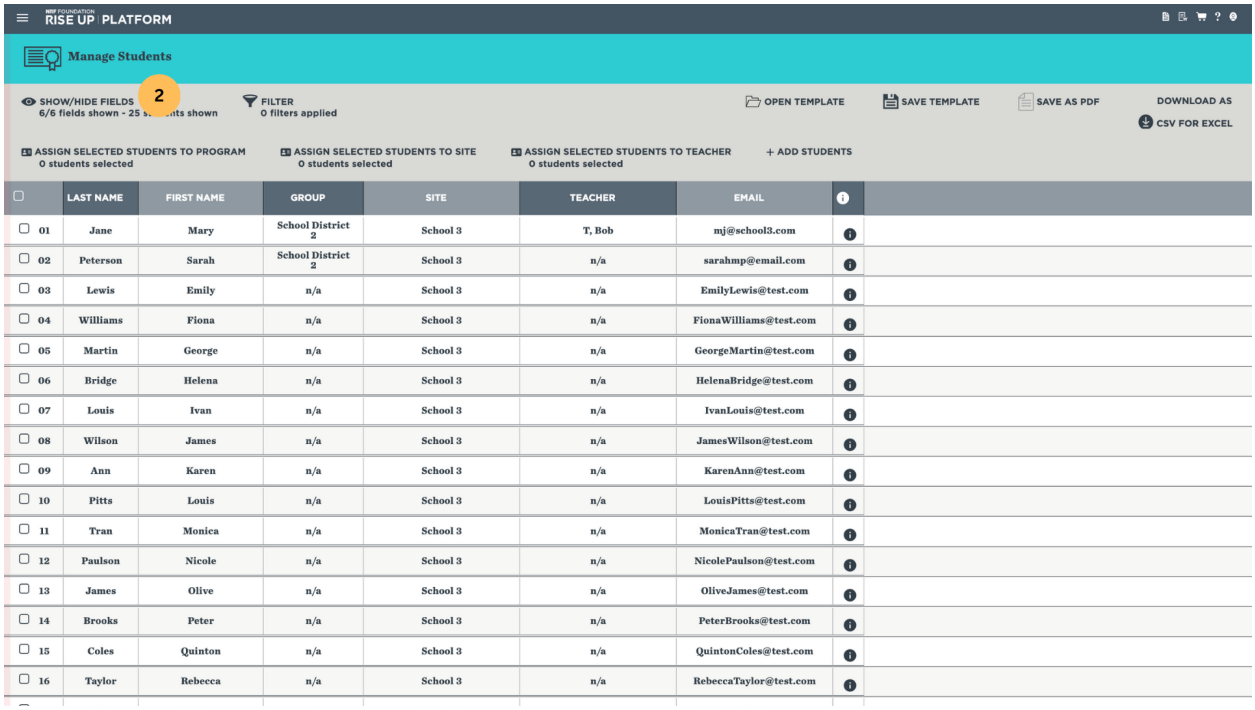
Connecting Students to a Teacher

When you add a student to your site, they are not automatically visible to the teachers you are connected to. You can choose to connect students to a teacher to let that teacher assign licenses to those students and track their progress. You can connect your students to a teacher when you are assigning students to a program(license) or when you are assigning licenses to students. You can also directly connect a student to a teacher.

1. Click **Manage Students** or **Assign Students** on the dashboard, or select it from the menu in the upper-left corner.

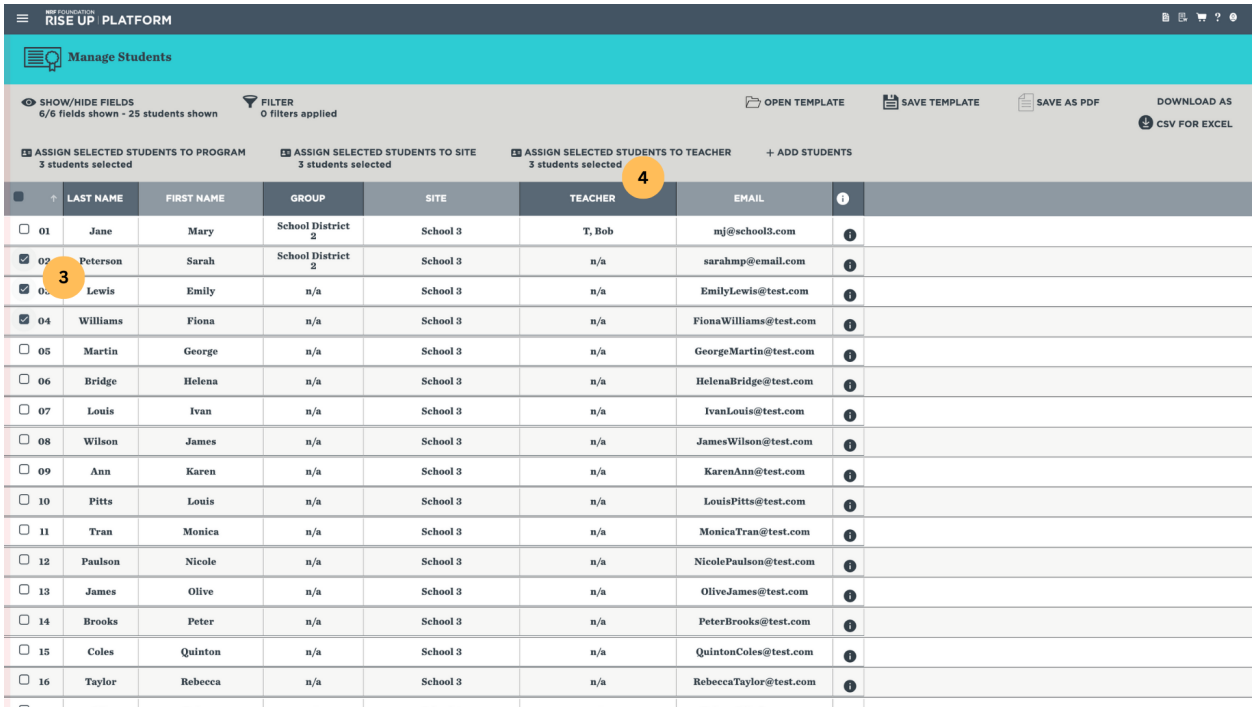


2. Identify the Student(s) that you want to connect to a Teacher.
    - Use the **SHOW/HIDE FIELDS** feature to customize the amount of information displayed about each student, helping you determine which students you want to connect to a site;
    - Use the **FILTER** feature to search for specific students based on criteria such as Course; and
    - Click on the column headings to sort the list of students.

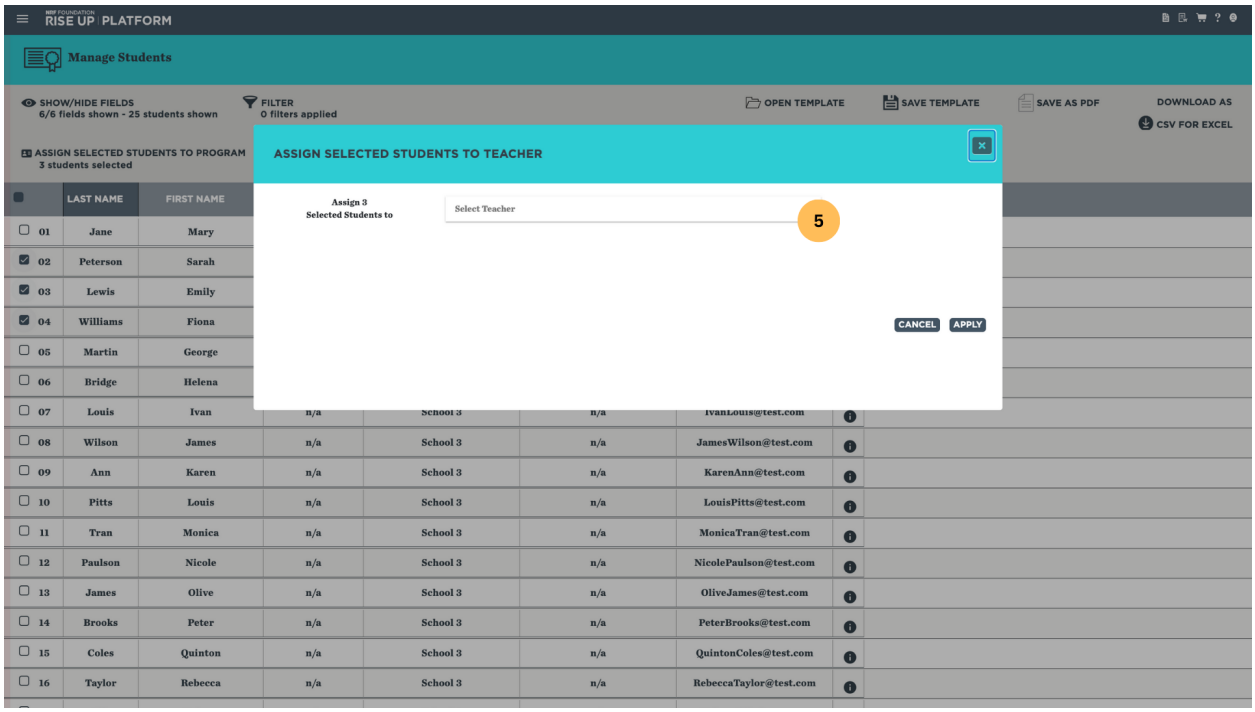


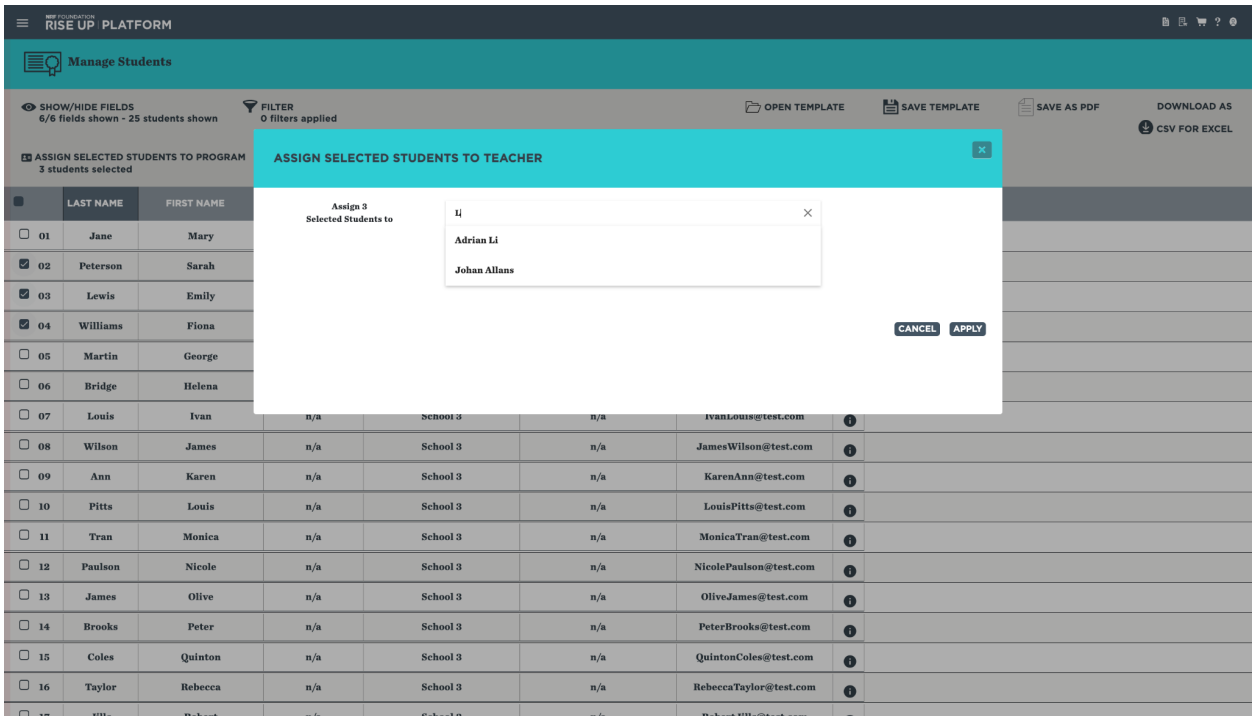
3. Click on the checkbox in the leftmost column to select each student you want to connect to the same Teacher. The number of selected students will appear under the ASSIGN SELECTED STUDENTS TO TEACHER button.

4. Click **ASSIGN SELECTED STUDENTS TO TEACHER.**

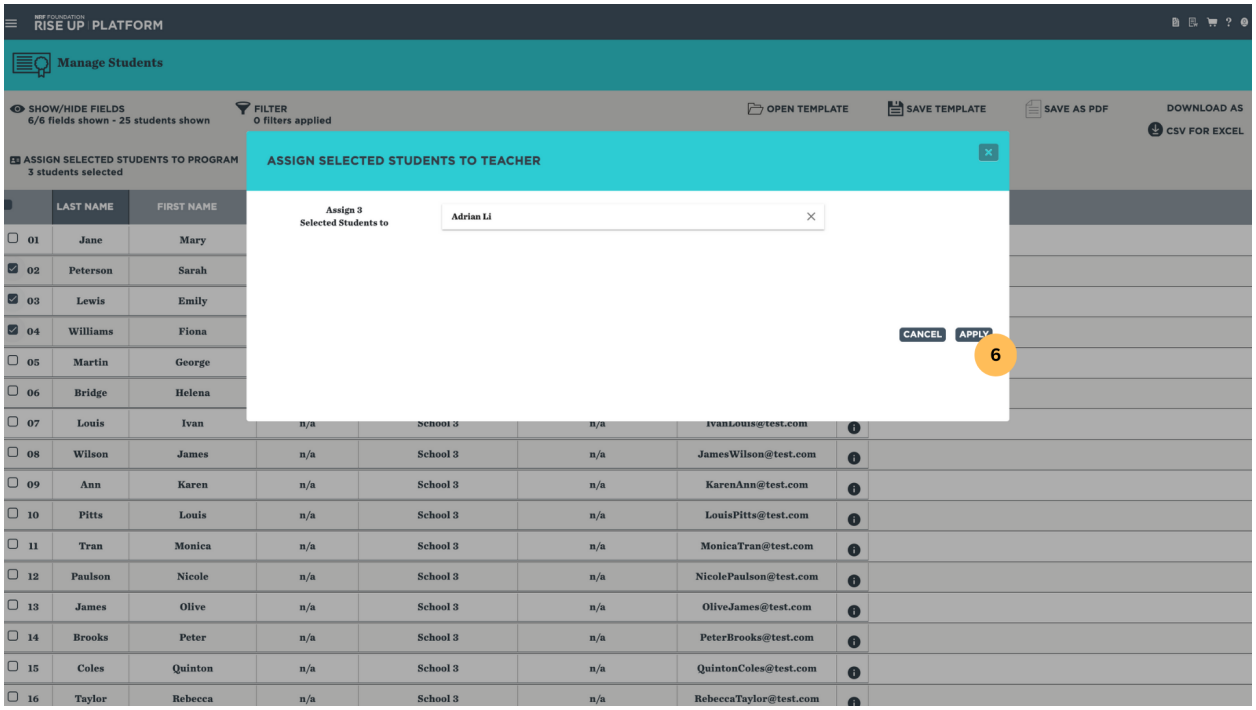


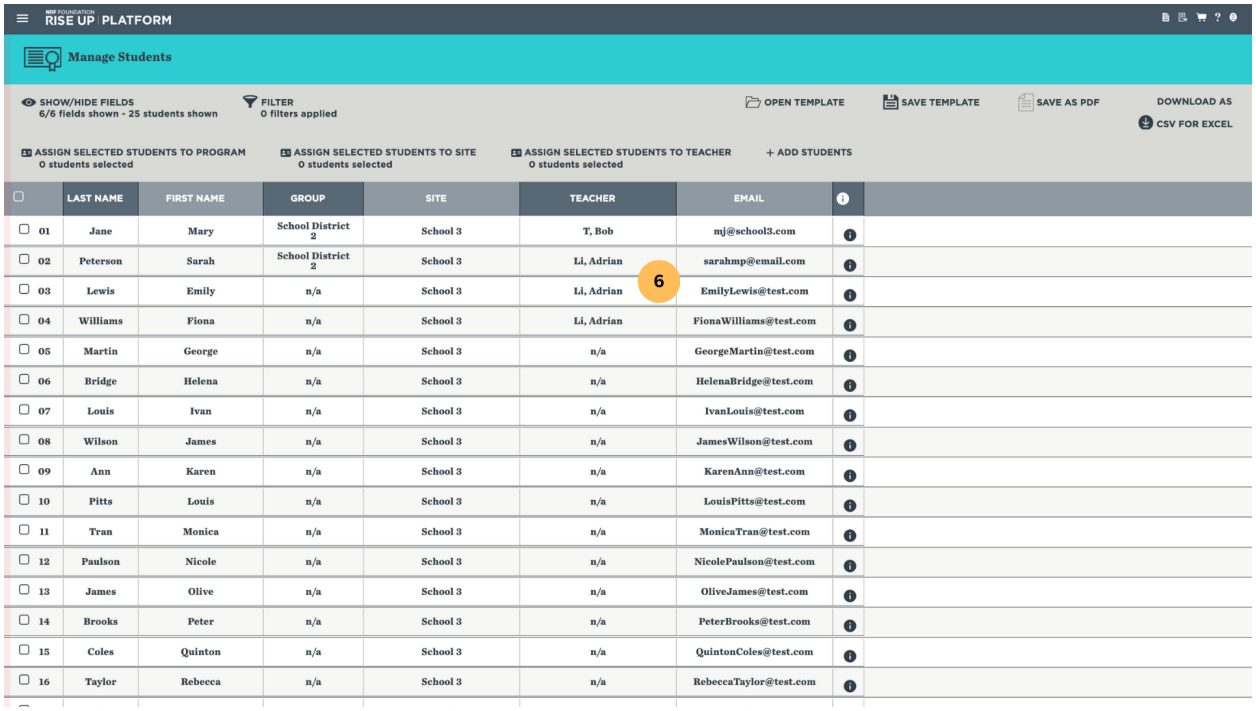
5. Select the Teacher from the list.





6. Click **APPLY**.

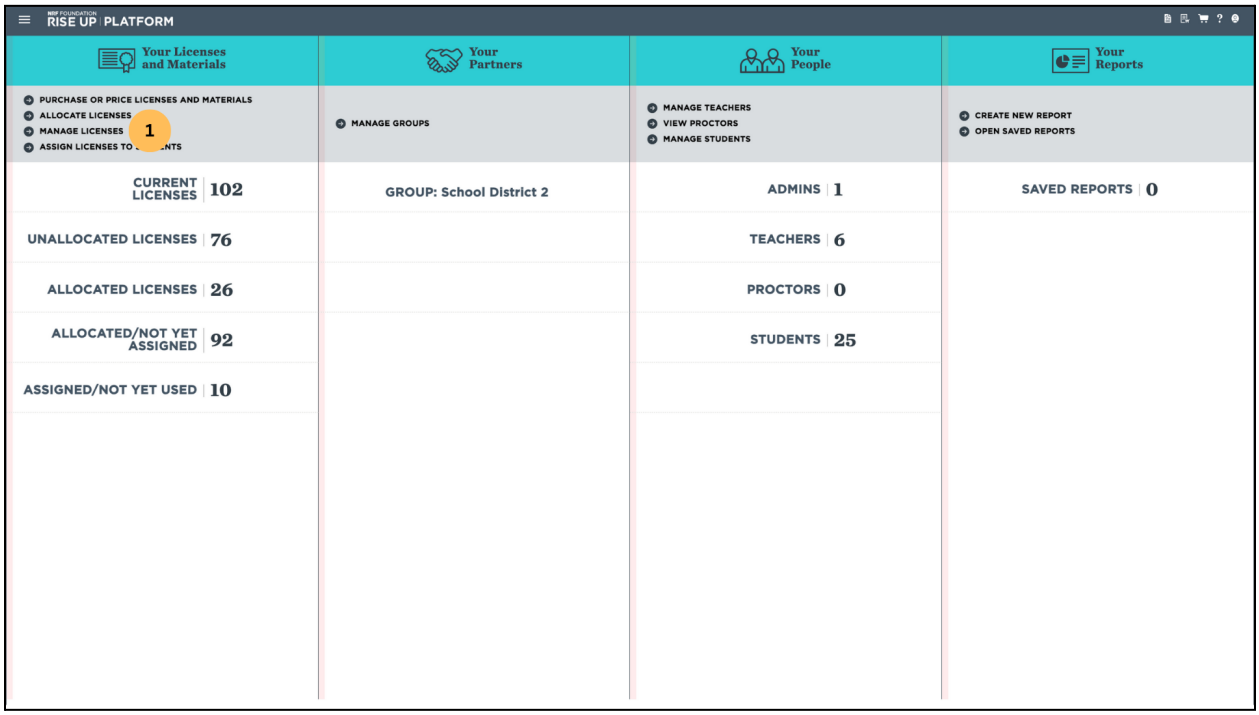

RISE UP PLATFORM
Manage Students
SHOW/HIDE FIELDS
6/6 fields shown - 25 students shown
FILTER
0 filters applied
OPEN TEMPLATE
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
ASSIGN SELECTED STUDENTS TO PROGRAM
3 students selected
ASSIGN SELECTED STUDENTS TO TEACHER
Assign 3
Selected Students to
Adrian Li
CANCEL
APPLY
6
LAST NAME
FIRST NAME
01 Jane Mary
02 Peterson Sarah
03 Lewis Emily
04 Williams Fiona
05 Martin George
06 Bridge Helena
07 Louis Ivan
08 Wilson James
09 Ann Karen
10 Pitts Louis
11 Tran Monica
12 Paulson Nicole
13 James Olive
14 Brooks Peter
15 Coles Quinton
16 Taylor Rebecca


RISE UP PLATFORM
Manage Students
SHOW/HIDE FIELDS
6/6 fields shown - 25 students shown
FILTER
0 filters applied
OPEN TEMPLATE
SAVE TEMPLATE
SAVE AS PDF
DOWNLOAD AS
CSV FOR EXCEL
ASSIGN SELECTED STUDENTS TO PROGRAM
0 students selected
ASSIGN SELECTED STUDENTS TO SITE
0 students selected
ASSIGN SELECTED STUDENTS TO TEACHER
0 students selected
+ ADD STUDENTS
LAST NAME
FIRST NAME
GROUP
SITE
TEACHER
EMAIL
01 Jane Mary School District 2 School 3 T, Bob mj@school3.com
02 Peterson Sarah School District 2 School 3 Li, Adrian sarahmp@email.com
03 Lewis Emily n/a School 3 Li, Adrian EmilyLewis@test.com
6
04 Williams Fiona n/a School 3 Li, Adrian FionaWilliams@test.com
05 Martin George n/a School 3 n/a GeorgeMartin@test.com
06 Bridge Helena n/a School 3 n/a HelenaBridge@test.com
07 Louis Ivan n/a School 3 n/a IvanLouis@test.com
08 Wilson James n/a School 3 n/a JamesWilson@test.com
09 Ann Karen n/a School 3 n/a KarenAnn@test.com
10 Pitts Louis n/a School 3 n/a LouisPitts@test.com
11 Tran Monica n/a School 3 n/a MonicaTran@test.com
12 Paulson Nicole n/a School 3 n/a NicolePaulson@test.com
13 James Olive n/a School 3 n/a OliveJames@test.com
14 Brooks Peter n/a School 3 n/a PeterBrooks@test.com
15 Coles Quinton n/a School 3 n/a QuintonColes@test.com
16 Taylor Rebecca n/a School 3 n/a RebeccaTaylor@test.com

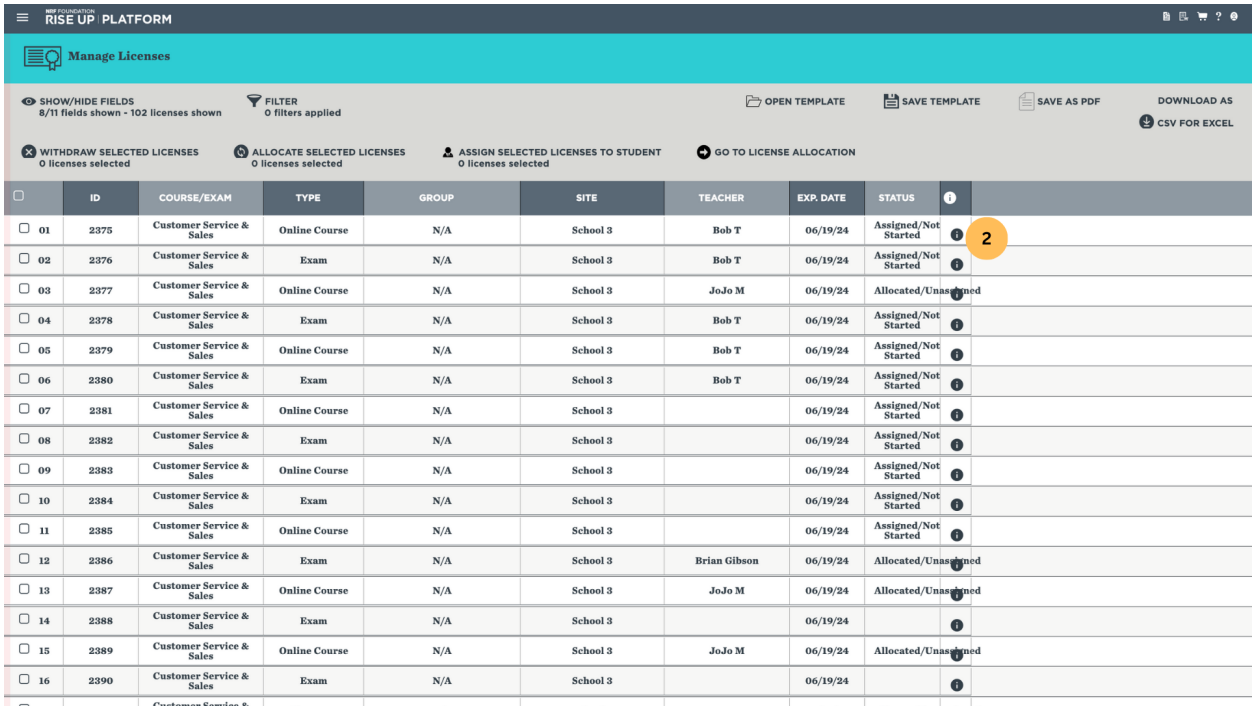
Viewing License Information

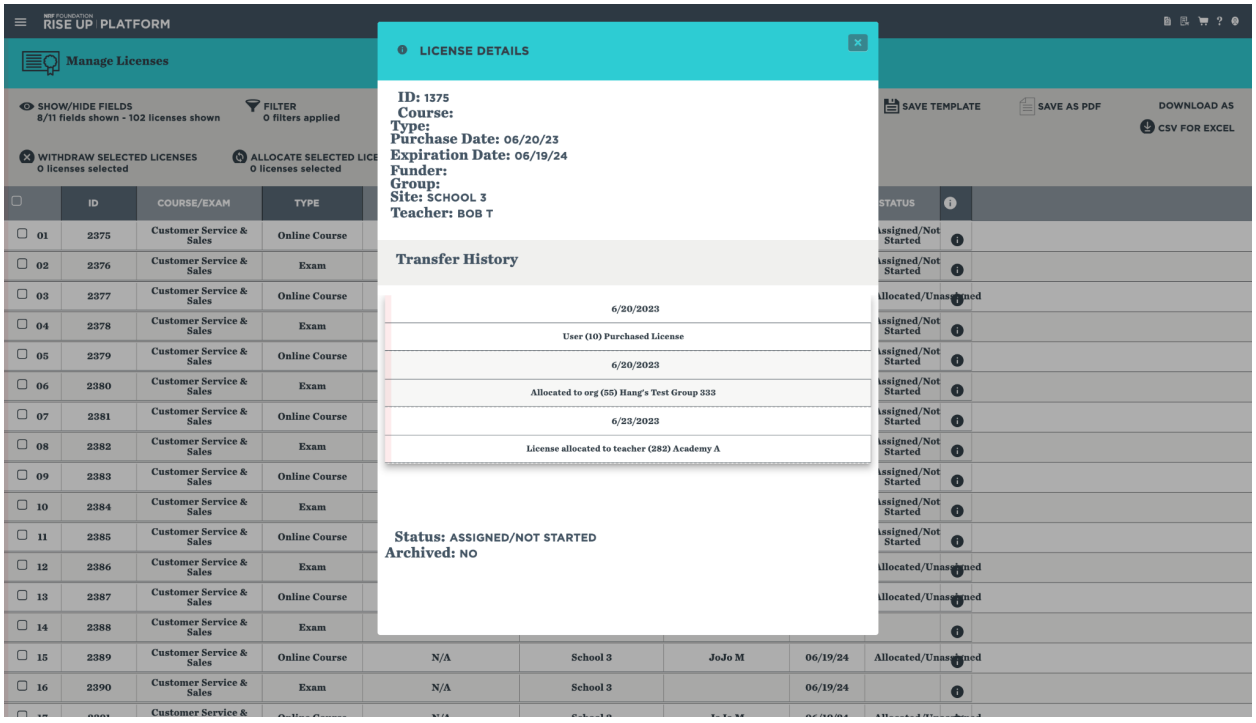
Use the Manage Licenses page to see information about your licenses.

1. Click **MANAGE LICENSES** on the dashboard, or select it from the menu in the upper-left corner.



2. On the Manage Licenses page, you will find an information icon ⓘ in the far right column for each license. Click the information icon and then a dialog box will open, providing you with detailed information about the selected license.



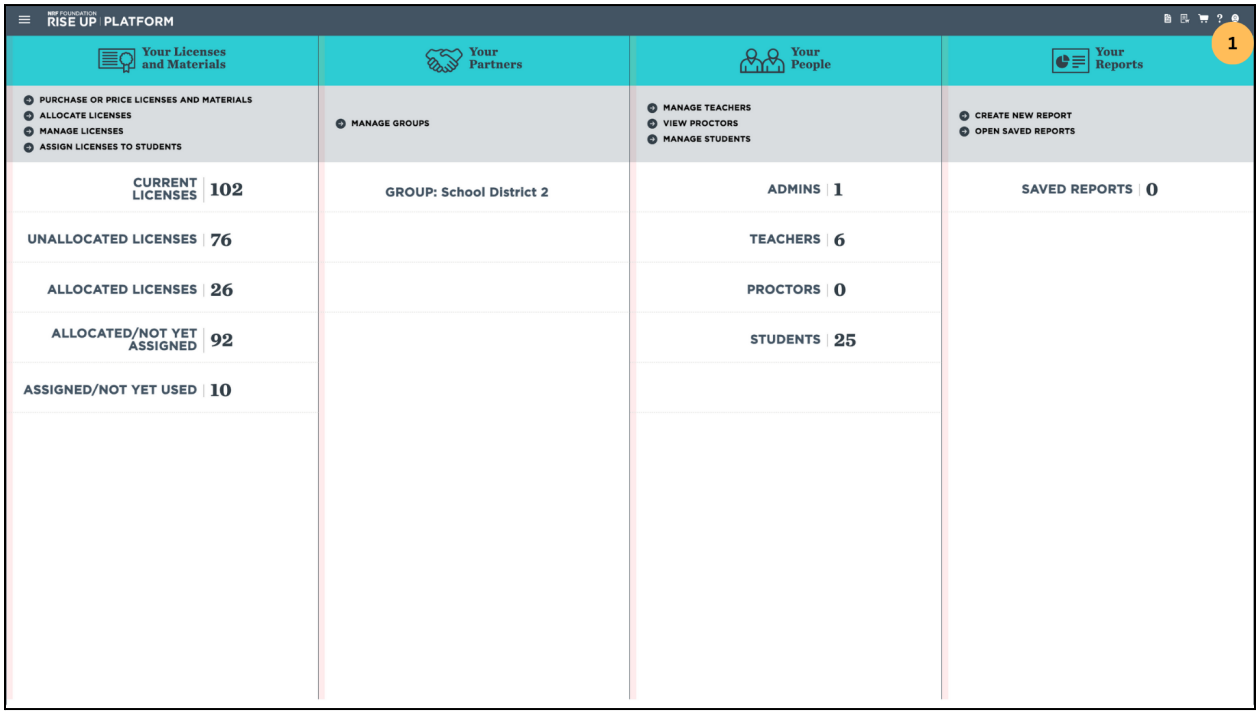


3. Click ✕ in the top right-hand corner to close the dialog box and return to the Manage Licenses page.

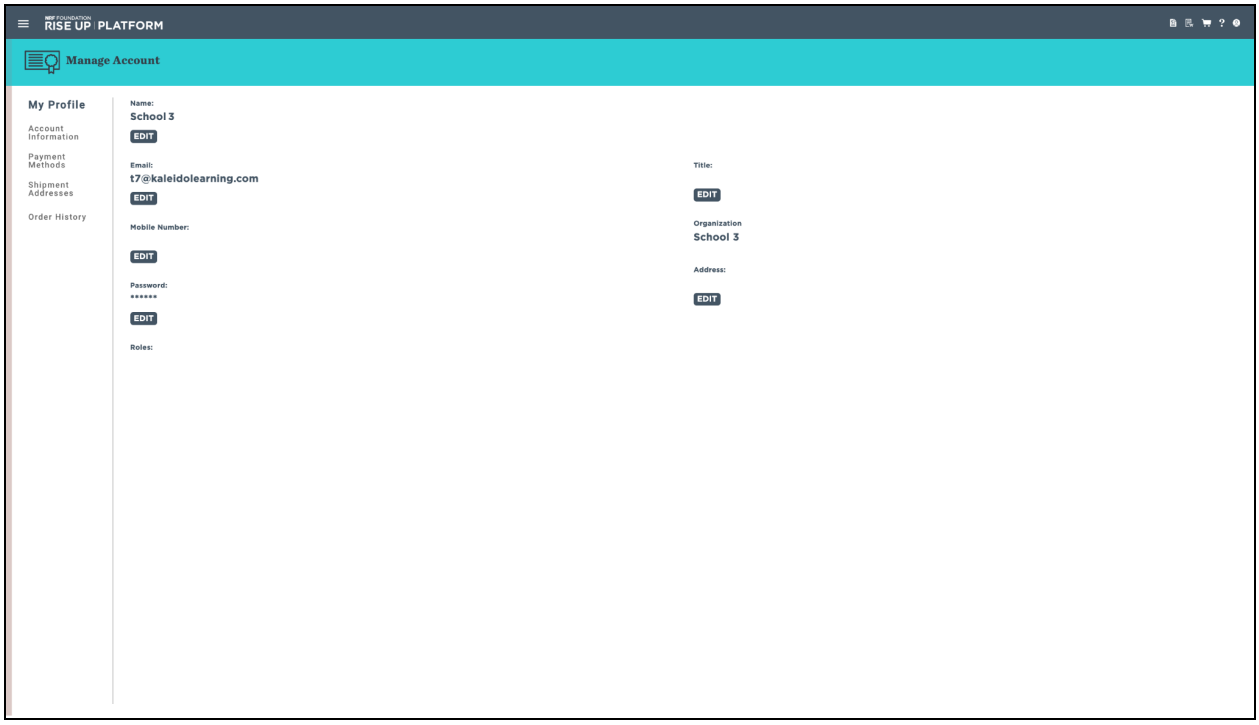
Editing Account Details and Viewing Order History

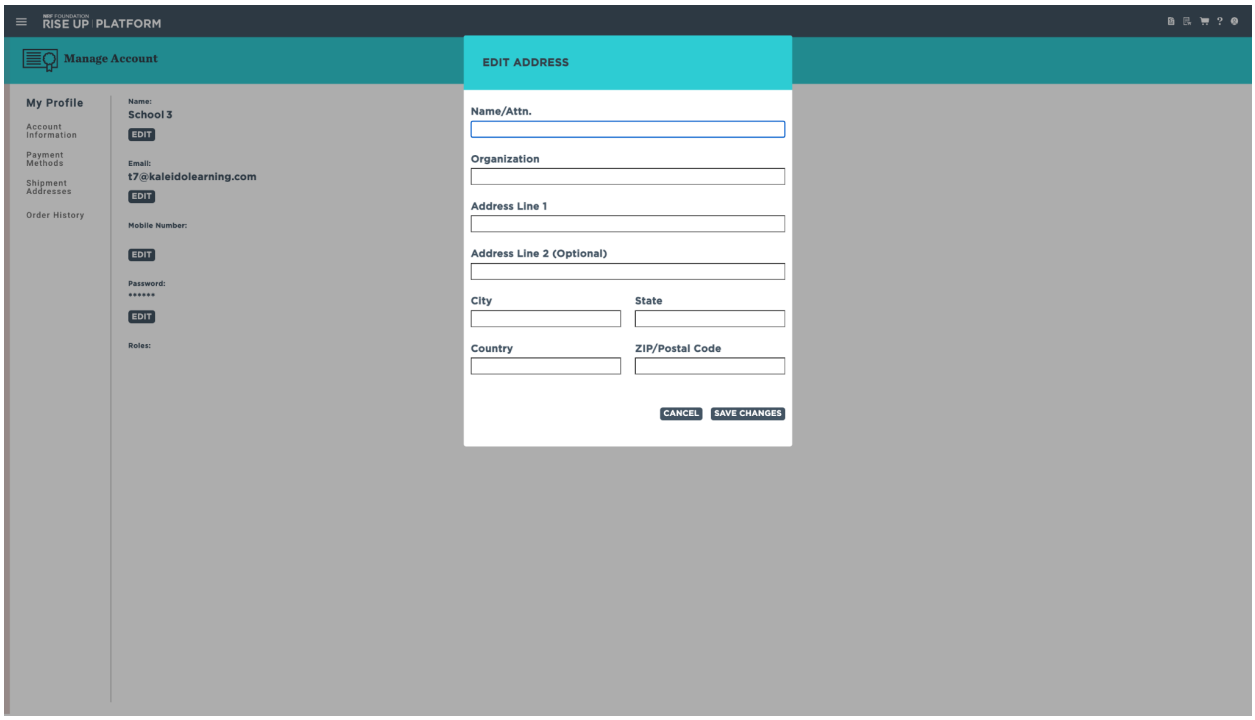
My Account can be used to add or update account information, including addresses, payment methods and shipping addresses. You can also view your order history here.

1. Click the **My Account** icon in the upper-right corner of any page.

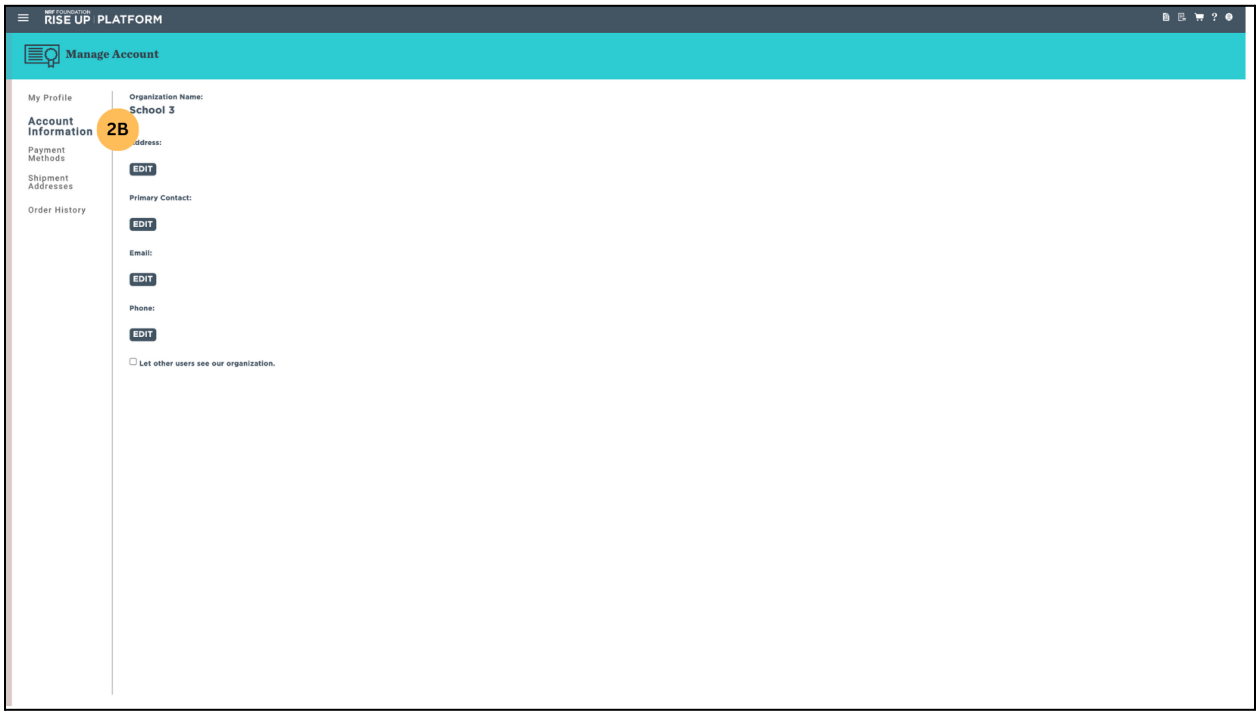


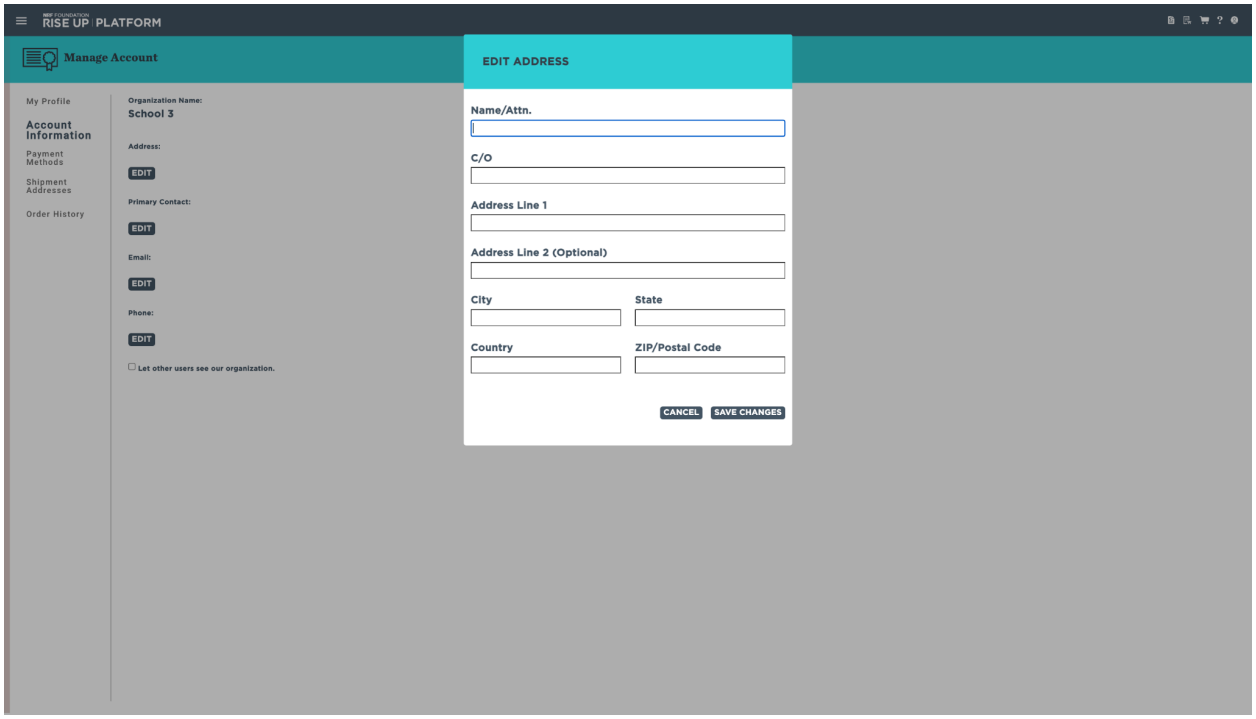
2. From the **My Account** page, you will be able to add or update information related to your Profile, Account Information, Payment Methods (Credit Cards and Purchase Orders), Shipping Addresses, and view your Order History.
    a. Under **My Profile**, you can edit your profile information.
        i. Click **EDIT** under the information you'd like to update.
        ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.



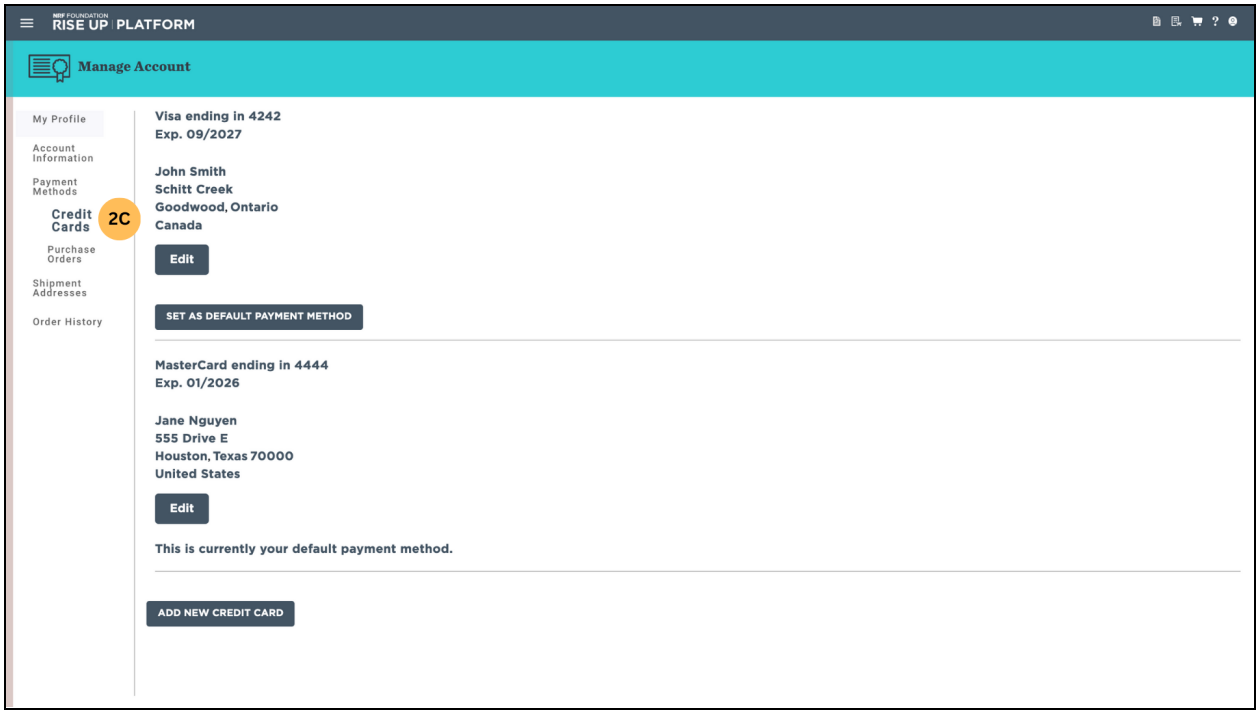


b. Under **Account Information,** you can edit your account information.
   i. Click **EDIT** under the information you'd like to update.
   ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.
   iii. If you'd like to let other users see your organization check the box next to "Let other users see our organization." at the bottom.



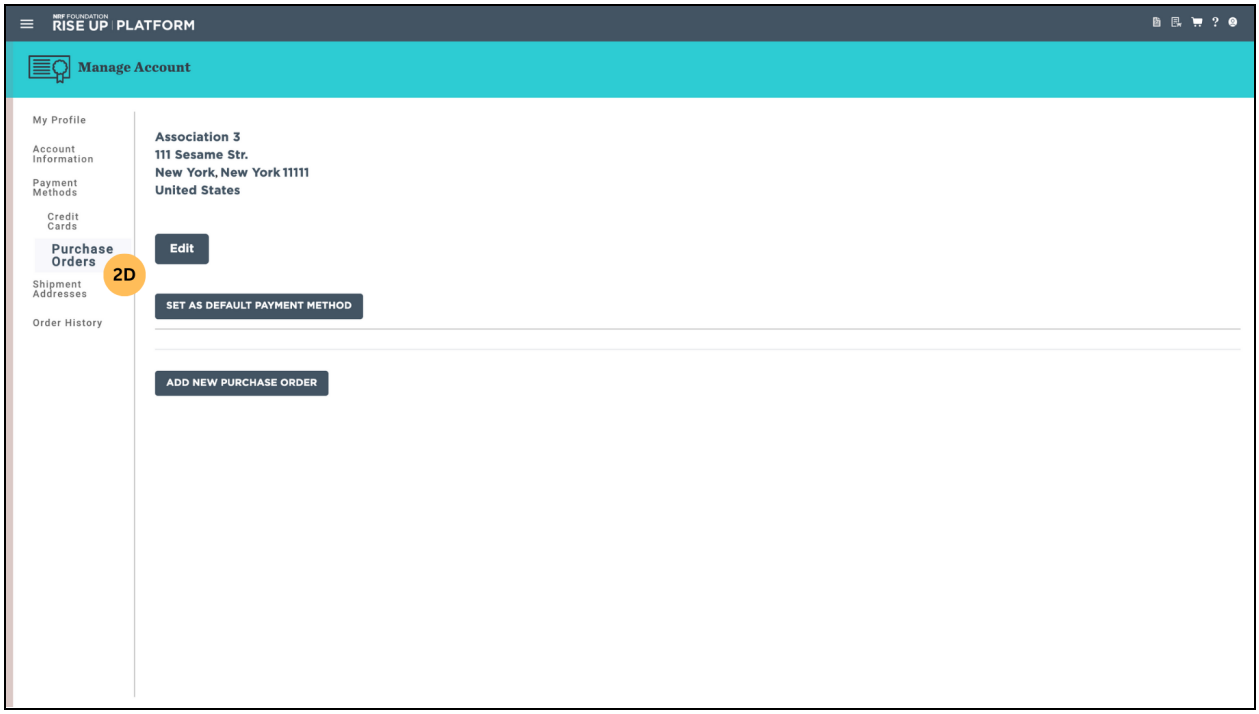


c. Under **Payment Methods**, under **Credit Cards**, you can edit or add credit cards.



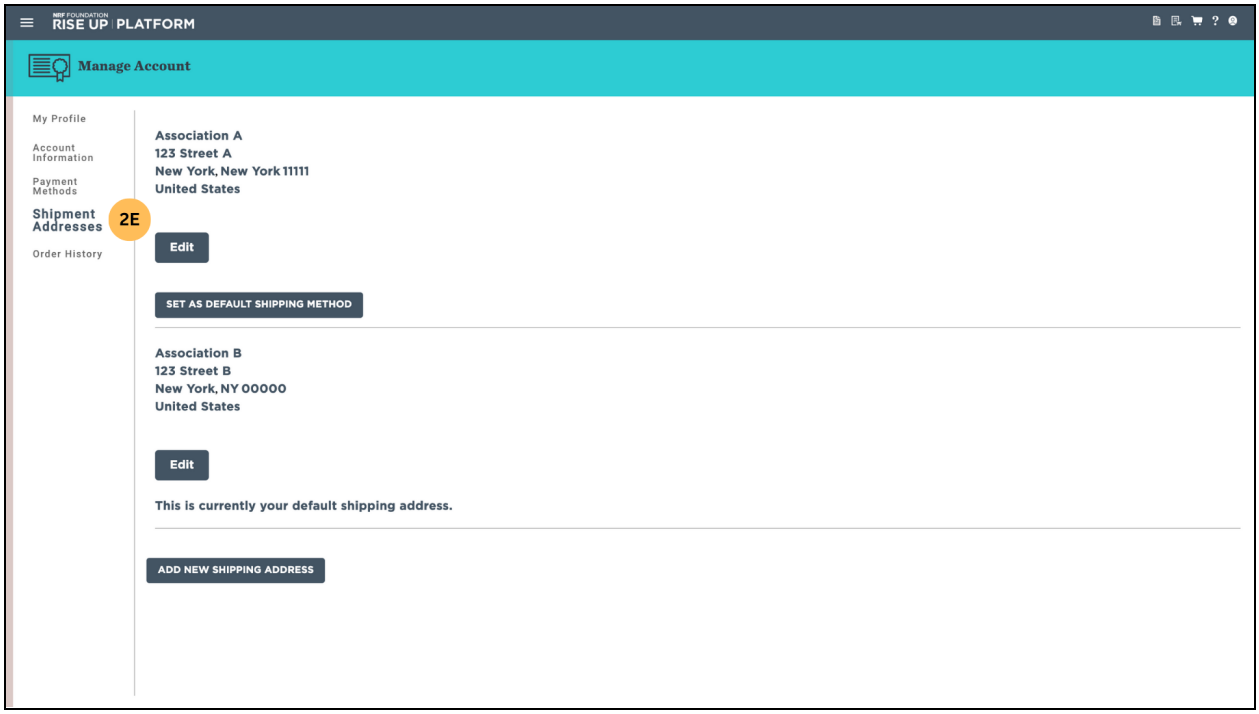
i. Click **EDIT** under the credit card you'd like to update.
ii. A dialog box with fields available to edit will appear. Enter the updated details and click **SAVE CHANGES** to update your information.
iii. If you'd like to add a new credit card, click **ADD NEW CREDIT CARD** at the bottom of the page. A dialog box asking you for the details of your new credit card will appear. Enter the relevant details. If you'd like to set this card as your new default payment method, leave the box checked. If not, uncheck the box. Click **SAVE CARD** to save your card details.
iv. If you'd like to change your default payment method, click **SET AS DEFAULT PAYMENT METHOD** under the desired credit card. A dialog box asking you to confirm your choice will appear. Click **YES** to confirm your new default payment method. Your selected default payment method should now say "This is currently your default payment method." underneath.

d. Under **Payment Methods**, under **Purchase Orders**, you can edit or add purchase order billing addresses.



i. Click **EDIT** under the purchase order billing address you'd like to update.
ii. A dialog box with fields available to edit will appear. Enter the changes and click **SAVE CHANGES** to update your information.
iii. If you'd like to add a new purchase order address, click **ADD NEW PURCHASE ORDER** at the bottom of the page. A dialog box asking you for the details of your new purchase order address will appear. Enter the relevant details. Click **SAVE CHANGES** to save your purchase order address details.
iv. If you'd like to change your default payment method, click **SET AS DEFAULT PAYMENT METHOD** under the desired purchase order address. A dialog box asking you to confirm your choice will appear. Click **YES** to confirm your new default payment method. Your selected default payment method should now say "This is currently your default payment method." underneath.

e. Under **Shipping Addresses**, you can edit or add shipping addresses.



i. Click **EDIT** under the shipping address you'd like to update.
ii. A dialog box with fields available to edit will appear. Enter the relevant details and click **SAVE CHANGES** to update your information.
iii. If you'd like to add a new shipping address, click **ADD NEW SHIPPING ADDRESS** at the bottom of the page. A dialog box asking you for the details of your new shipping address will appear. Enter the relevant details. Click **SAVE CHANGES** to save your shipping address details.
iv. If you'd like to change your default shipping address, click **SET AS DEFAULT SHIPPING ADDRESS** under the desired shipping address. A dialog box asking you to confirm your choice will appear. Click YES to confirm your new shipping. Your selected default shipping address should now say "This is currently your default shipping address." underneath.

f. Under **Order History,** you can see the details of your previously placed orders.

Signing Up as an In-person Proctor

Administrators of sites can also sign up to be in-person proctors to administer online exams in an in-person setting, usually for a group of students.

1. Click **APPLY TO BE A PROCTOR** from either the Manage Account: My Profile page or the Proctor Exam page. This opens a dialog with the rules and responsibilities for proctors.
2. Read these rules and responsibilities, and then click **ACCEPT** to agree to them. You will then be granted permission to proctor exams.

Proctoring an Exam

Administrators with proctor status can proctor exams by providing a unique code for the students to enter.

Before you proctor an exam, make sure that all the students taking the exam are connected to your site. You can check this on the Manage Students page.

1. Open the Proctor Exam page by selecting it from the menu in the upper-left corner.
2. Click **ACCOMMODATION RESOURCES** for ideas on how to make accommodations for your students. Make sure you have reviewed and are following the rules for proctoring exams, and that you are meeting your students' accommodation needs.
3. Click **GET TODAY'S CODE**, and provide this code to your students to activate the exam.

Reporting an Exam Violation

If you witness a violation (like cheating) while you are proctoring an exam, make sure to report it.

1. Open the Proctor Exam page by selecting it from the menu in the upper-left corner.
2. Click **REPORT A VIOLATION.**
3. Complete the violation dialog.
4. Select the student from a list of all students associated with the proctor.
5. Select the exam from a list of all exam types.
6. Enter a description of the violation.
7. Click **REPORT**.
8. The RISE Up team will be notified about the violation with information about the student, the proctor, the exam, and the details of the violation, and will make a decision about how to handle the results of the exam.

Requesting Accommodations for Students

If you have students who need accommodations for testing, request those accommodations in advance.

1. Click **MANAGE STUDENTS** on the dashboard, or select it from the menu in the upper-left corner.
2. Identify the Student for whom you want to request accommodations. Use **SHOW/HIDE FIELDS**, **FILTER**, and/or click on column headers to sort to help you find the correct student.
3. Click the info button  for that student.
4. In the student info dialog, click **REQUEST ACCOMMODATIONS**.
5. Complete the Request Accommodations information.
6. Click **SUBMIT.** Your request will be submitted, and the requested accommodations will appear as “pending” for the student. You will receive a response by email, and the status of the accommodations will be updated in the system.