# Talking Fingers Online - Administrator Guide

## Table of Contents (New 2012 features and instructions have asterisks)

# Managing Associates

All adult users in the system are called associates. School license administrators often want to allow teachers to manage their students directly. To add a level of hierarchy for this purpose, you can create teacher associates and delegate a given number of user license slots to each.

Likewise, a district administrator can create a multi-level hierarchy which includes a site administrator associate at each school and, beneath the site administrator associate, several teacher associates who each are assigned a given number of user license slots. To create the hierarchy each new associate must be created by the associate directly above him or her in the hierarchy.

There are two ways to add associates: manually add each associate, or import a list of associates from a CSV file.

**IMPORTANT NOTE**: **We strongly recommend school license administrators create associates before importing students, in order to import the student to the correct associate.**

## Creating associates

### Adding an associate

To manually add an associate, click the Add link at the top of the Associates page and fill in the information to create an associate. The required fields are the first name, last name, username and password.

Once you create associates, they can log in with the username and password you provided. You can also click on the link to "Act as another associate", just below your name at the top of the page.

## Add Associate Profile

### Profile

Required fields: *

Username *

Password *

First *

Last *

School optional

### Address

Street Address optional

City optional

State / Province optional

Country optional

Postal / Zip Code optional

**NOTE**: The username you select must be unique across all associates and students in the system. If it is not you will be presented with an error message and an alternative suggestion.

**Importing associates**

To enter data for a large number of associates, you can import a text file in CSV format. Click on "example CSV file" to download a template to your computer. Then, open, enter your associates' info and save to create a document that can be imported into the system. The instructions are on the page where you perform this task, as shown under Notes on import format in the screenshot.

**NOTE**: You can open a CSV file in Microsoft Excel for an easy-to-edit spreadsheet format. When saving, make sure to save as a CSV file, with that extension.

## Import Associates

[ ] Browse...
Import

If you require a **properly formatted template** to start with, please use this example CSV file.

Notes on import format:

- The import file must be **comma delimited** (normal extension *.csv*).
- To add new associates place **ADD** or **A** in the *ACTION* column of the .csv file you will be importing. (see template)
- When editing existing associates always start with the file generated by **Export CSV**.
- Do not change the *ID* column, and for new imports leave this field blank.
- To edit existing associate information through an import place **EDIT** or **E** in the *ACTION* column of the .csv file you will be importing and ensure that exported ID number in the *ID* column is unchanged.
- Currently the only defined actions are **ADD**, for creating new associates, and **EDIT** for editing existing associates. Imported rows with any other value in the *ACTION* column of the .csv file will be ignored.
- Usernames must be between 4 and 25 characters long.
- Passwords must be at least four characters long.

1. Click on the **example CSV file** link under Import Associates. This will open a sample file that can be used to save a single sample associate.
2. Edit the provided file to add the data for your other associates. The required fields are: FIRST NAME, LAST NAME, USERNAME and PASSWORD. Do not change the ID column, and for new imports leave this field blank.
3. Save the edited file and import it into the system (click Browse under Import Associates, locate the file, then click Import).

**NOTE**: After importing, it's advisable to export the file so you can double check the data. To do this, click **Export CSV** under the listing of associates.

**NOTE**: Exporting your list will be particularly important if you choose to import a large list of students and assign them to an associate beneath you in the hierarchy while importing. This will be explained further in the Importing Students section.

**NOTE**: Associates **should be imported by their direct supervisor.** This ensures that the associates are visible to the correct supervisors.

**NOTE**: Talking Fingers does not advise importing a large list of associates that includes sub-associates. The sub-associate entries will be ignored, but the checks required to determine if the current user has permission to edit these associates will slow the process down significantly.

### Editing associate details

You can edit the details for an associate from the Associates page - click on the  name of the associate you wish to edit, then click the Edit link to the right of the heading Associate Profile.  To edit multiple associates, you can export the list of associates as a CSV file, edit the file, then reimport the file to update the associate details.

To edit the CSV file, you must set the ACTION column to "EDIT" for that associate. Do not change the ID column, and for new imports leave this field blank.

You can only edit your associates in this manner. To edit sub-associates added by one of your associates, you must act as that associate.

### Reassigning associates *

To reassign one associate to a different associate, you will use the edit function described previously in the "Editing associate details" section.  Choose the new associate to whom the edited associate will be reassigned from the "Superior" drop-down menu, then click the "Save Changes" button at the bottom of the edit screen.



After saving your changes, you will be taken back to the Associate Profile screen and will see the following confirmation of your changes in green:

## Delegating license slots to associates

In order for your associates to assign user license slots to their students, you must first delegate user license slots to them. To delegate user license slots, click Your Licenses, then click the Delegate link. From the Delegate view, you can specify the number of user license slots from a given license to delegate to a specified associate below you in the hierarchy, or to the administrator/associate above you. Note that the user license slot is not considered in use when delegated to an associate, since they won't be using the program; they are still available until assigned to a student.



**NOTE**: The license slot drop-down shows licenses that are not expired and shows the number of license slots in use and the total number of license slots (the last two digits in the license number). You can only delegate available license slots. In the example there are **0** slots in use out of a total of **3** slots available for the first license. The first line delegates **1** of these to **melissa** . The second line delegates **3** of the **8** available slots in the second license (with **9** slots total and **1** already in use) to **melissa Titone**.

## Acting as a different associate

Any associate can add additional associates to the system. This builds a hierarchy in which the associate adding other associates is assumed to be the supervisor of the added associate. To enable supervisors to modify data entered by their sub-associates, the program allows an associate to act as an associate they added, or as associate added by those sub-associates.

At the top of every page under your name is a link to **Act as another associate**. Click the link to view a page listing the associates as whom you can act. You can use the search function to narrow down the list if needed, but normally all the available associates are visible on the first page.

# You can act as the following associates

Restrict to yourself plus associates matching [                    ] [ Search ]

| Associate | School | Username |
|-----------|--------|----------|
| Bob Smith | Sample School | bobsmith |
| Jessie Bizler | Sample School | jessiebizler |

When you click on the name of an associate, you will then be acting as that person. Once you are acting as another associate, a link to **Act as yourself** will appear at the top of every page. Click this link to set your view back to the associate as whom you logged in.

## Viewing associate information

The Your Associates screen shows a threaded list of all of the associates you have added as well as all of the associates that those associates have added (and any associates added by them, and so on). It also shows the number of license slots delegated and used by each associate, the name of their school (if noted), their username and last date any information was modified.  This feature is provided for school and school district licenses, so that schools and districts can allow an administrator or teachers to manage their own students' information. Parents will usually not use the Associates function.

To narrow the list of associates, click Restrict to associates matching. You can also enter a name or partial name in the name matching field.



## Modify Check box *

The Modify check box that is beneath the list of associates (see illustration above) will show the total number of your associates and, if checked, will perform any chosen Action on the entire list of associates, including ones not listed on the current page.

## Drop-down Action menu in Your Associates screen *

There are several actions that can be performed related to an individual associate or specified group of  associates. Actions are chosen from a drop-down menu at the bottom of the associate list in the "Your Associates" screen.  Detailed explanations of each action appear on screen as an action is chosen.

## Archive Selected associates *

You can archive associates who no longer need access to the program.  Archiving associates will free any license slots delegated to those associates.  An archived associate will no longer appear in the list of active associates in the Your Associates screen.

To archive associates, select the checkboxes next to their names in the list of active associates, then select the "Archive Selected" button from the drop-down menu.

**NOTE**: Selecting the checkbox next to "Modify (total #) matching associates allows you to perform an action from the drop-down menu on all your associates.

When you choose "Archive Selected" from the drop-down menu, the following screen will appear:



After clicking the "Confirm" button (see above), you will see the following pop-up box:



To complete the archive, click the OK button. The selected associate will be archived, and you will be redirected to the Archived Associate view. You can also access this view by clicking View Archived associates on the bottom right of the archived associate list. To return to the active associate view, click the "View Active associates" link on the bottom right of the archived associate list, or click the Your Associates button.

**NOTE**: When the list is long enough to span several pages, you will need to repeat the archive process on each page or select the "Modify (total #) matching associates" checkbox.

### Distribute licenses *

Distribute licenses will allow you to delegate one or more available license slots to the selected associate(s).



### Reclaim Licenses *

Reclaim Licenses will take the license(s) from the selected associates and give them back to the administrator.

### Drop-down menu in Archived Associates screen *

At any time, you can view your list of archived associates by clicking on the link at the bottom of the list on the Your Associates screen. From within the Archived Associates screen, a drop-down menu allows two actions: Reactivate Selected associates or Delete Selected associates (see illustration on next page).

## Reactivate Selected associates *

As stated, this action allows you to reactivate one or more associates who have been archived.  Reactivated associates will NOT be automatically assigned available license slots.  Licenses are delegated to reactivated associates from the Delegate user license slots link on the Your Licenses screen.  They can also be calculated and Distributed to the associate using the Distribute Licenses action in the Your Associates screen, after the reactivated associate is assigned or creates a list of students.

## Delete Selected associates *

Associate accounts can only be deleted from the system from within the Archived Associates screen.  Once deleted, all information associated with the associate(s) is erased from the system and can not be recovered. To delete  associates, select the checkboxes next to their names in the list of archived associates, then select the Delete Selected button from the drop-down menu.



After clicking the "Confirm" button (see above), you will see the following pop-up box:
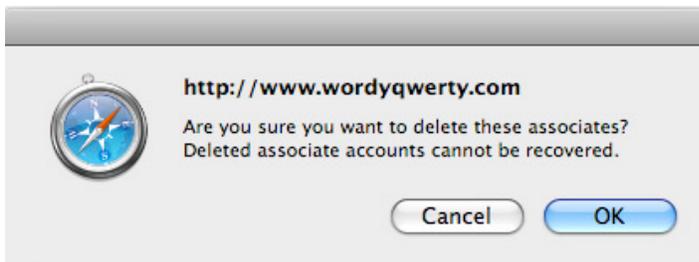


To complete the Delete Selected action, click the OK button.

## • Importing students

There are two ways to add students: manually add each student, or import a list of students from a CSV file. When you want to add more than a few students, importing a CSV file is more efficient. The instructions are on the page where you perform this task, as shown under Notes on import format in the screenshot.

## Import Students

[ _____ ] ( Browse... )

[ Import ]

If you require a **properly formatted template** to start with, please use this example CSV file.

Notes on import format:

- The import file must be **comma delimited** (normal extension *.csv*).
- To add new students place **ADD** or **A** in the *ACTION* column of the .csv file you will be importing. (see template)
- When editing existing students always start with the file generated by **Export CSV**.
- Do not change the *ID* column, and for new imports leave this field blank.
- To edit existing student information through an import place **EDIT** or **E** in the *ACTION* column of the .csv file you will be importing and ensure that exported ID number in the *ID* column is unchanged.
- Currently the only defined actions are **ADD**, for creating new students, and **EDIT** for editing existing students. Imported rows with any other value in the *ACTION* column of the .csv file will be ignored.
- **LOGIN USERNAME** must be between 4 and 25 characters long.
- **LOGIN PASSWORD** must be at least four characters long.
- If **LOGIN PASSWORD** is **left blank**, as in the exported example, the student's password will not be changed.
- You may want to specify an **ALLOWED LOGIN START TIME** and **ALLOWED LOGIN END TIME** (preferably in 24-hour format) if you want to restrict the time of day and/or days of the week a student uses the program. The default setting allows unrestricted use.
- If you specify **ALL** of the **ALLOWED LOGIN** fields as **N** the student will not be able to log in.
- You must specify one or more of the **ALLOWED LICENSE TYPES** or the student will not be able to log in. Valid license types include **RWT** for *Read, Write, and Type* and **WQ** for *Wordy Qwerty*

1. Click on the **example CSV file** link under Import Students. This will open a sample file that can be used to save a single example student.
2. Edit the file to add the data for your students. The required fields are: FIRST NAME, LAST NAME, USERNAME, PASSWORD, ALLOWED LOGIN START TIME and ALLOWED LOGIN END TIME. Do not change the ID column, and for new imports leave this field blank.
3. Optional fields include: a) Days of the week students are allowed to log in (use Y or N in the field for each day); b) Pass Level field (the default pass level setting is 70% but you can change this percentage); c) ESL Index (current help languages are Arabic, Farsi, Japanese, Malay, Mandarin & Spanish. More languages will be added in the future.
4. To import large lists of students and assign them to specific associates during the import, you must fill in the final field in each row, entitled "Associate ID." This ID will be found in the "associate export" file you download after adding all your associates.
5. Save the edited student file and import it into the system (click Browse under Import Students, locate the file, then click Import).

**NOTE**: After importing, it's advisable to export the file and double check the data. To do this, click **Export CSV** under the listing of students.

**NOTE**: Students **may also be imported per class** by the associate responsible for that class. This minimizes the amount of data imported in any single action and makes it easier to re-import when the system identifies a user name that has already been taken.

**NOTE**: The usernames you select must be unique - different from all associates and students in the system. If ithey are not, you will be presented with an error message and the students' info will not be imported. User names can be between 4 and 25 characters long. Passwords do not have to be unique but must be between 4 and 25 characters.

## Editing student details

You can edit the details for a student from the Students page - click on the link for a student, then click Edit from the Student Profile. To edit multiple students, you can export the list of students as a CSV file, edit the file, then reimport the file to update the student details.

To edit the CSV file, you must set the ACTION column to "EDIT" for that student. Do not change the ID column, and for new imports leave this field blank.

You can only edit your students in this manner. To edit details for students created by one of your sub-associates, you must act as that associate.

**NOTE**: While the student progress information is included in this file, it will be ignored when the edited file is imported. The only way to update the student progress information is for that student to log in and use the programs.

## Reassigning students to another associate *

To reassign a student or group of students to a different associate, first click the "Your Students" button.  Select the students who will be reassigned.  Click and hold on the "Action" drop down menu and select the "Reassign to..." for the new associate to whom the student(s) will be reassigned.

**NOTE**: Students can be reassigned to the associate immediately above you in the hierarchy or to any associates you have created below you in the hierarchy.