

rapidRoster

User Guide

SumTotal

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Overview

We are excited that you have chosen rapidRoster to be your roster management system. This User Guide will walk you through how to use rapidRoster to electronically help you keep track of Learners who came to and completed your training events. That information is then connected to your company's LMS.

rapidRoster is a web-based solution with a central database backend that is accessed from any PC or Laptop via a web-browser (Internet Explorer, Google Chrome, Firefox, or Safari). There is also limited Tablet support. The web interface creates an electronic roster of the Learners attending live training events. As Learners enter the classroom, the Instructor will scan the Learner's ID barcode, mag strip, proximity badge, or the Instructor can search based on the Learner's First Name, Last Name, Organization Name, or ID. rapidRoster validates the Learner's ID and class ID by communicating directly to the database of your LMS, and presents the validated information for visual verification. Once verified, rapidRoster will communicate with the LMS to record that the Learner has checked into the class. Upon class completion, the Instructor may re-scan the Learner's badge (or other available option) or the Instructor can mark the entire class as 'complete' with a single click. rapidRoster will validate the user information and communicate with the LMS to record the user's completion of the class.

Getting Started

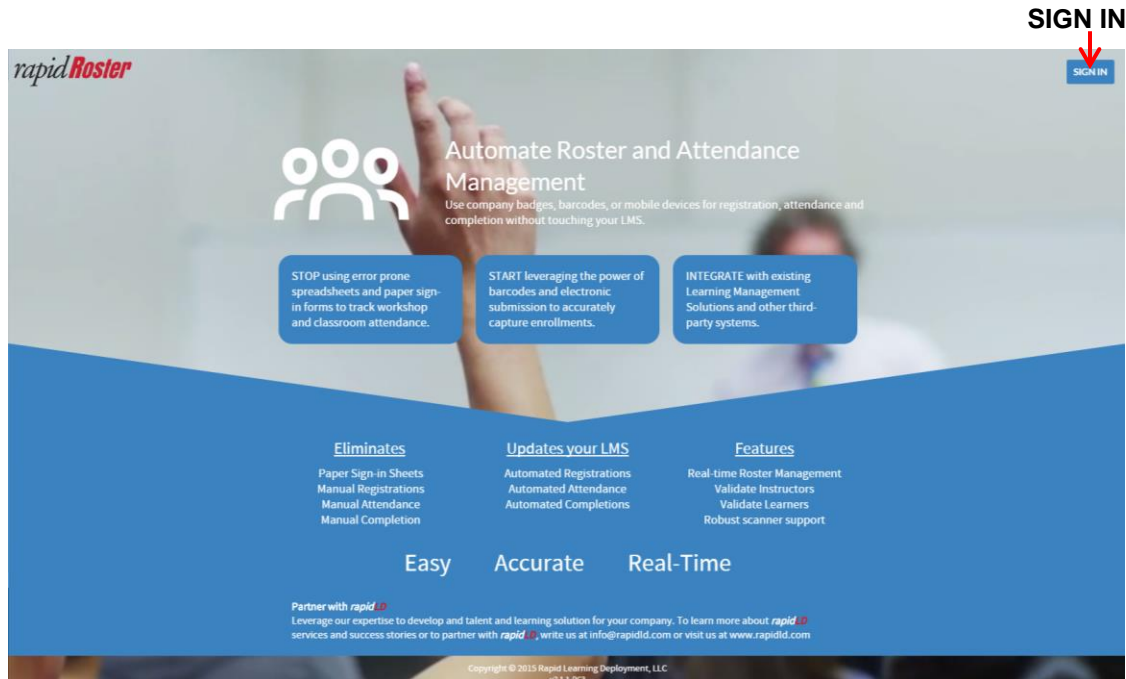
1. Accessing rapidRoster

- 1) **Open your Internet browser** (Internet Explorer, Google Chrome, Firefox, or Safari) on your PC or Laptop
- 2) **Enter the provided url** in your Internet browser to access rapidRoster
 - a. If your organization has SSO (single sign-on) set up, then access it via that URL
- 3) You are now in the rapidRoster application

2. Login Page

If you have a URL for rapidRoster then you will have to sign in. After clicking “SIGN IN” the instructor is sent to the login page. The instructor then enters the required fields to login: Username, Password, and Company to gain access to rapidRoster.

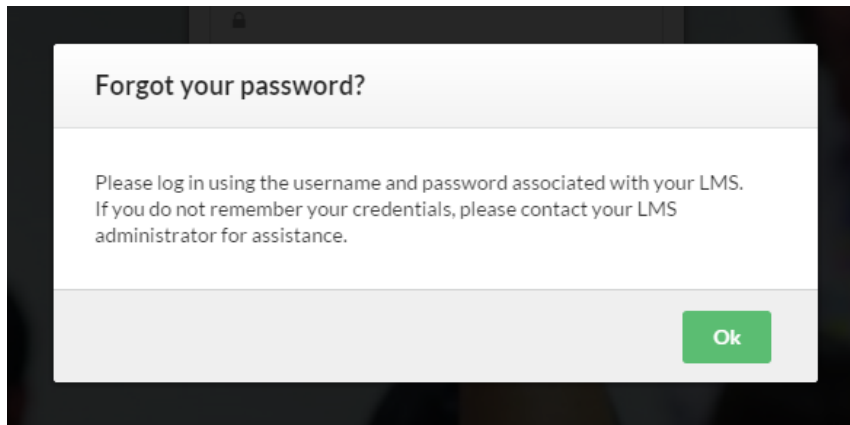
- 1) Click **SIGN IN** to go to the login page in rapidRoster
 - a. NOTE: If SSO is turned on then you will bypass the login process



- 2) Enter your **Username**, **Password**, and **Company**
 - a. NOTE: Use your SumTotal username and password to log in to rapidRoster
- 3) Click **Submit**

Login Page (cont.)

- If you have forgotten your password then click “**Forgot password?**”
 - A pop-up will display to remind the user to use their credentials (username and password) from their LMS to log into rapidRoster.



3. Single Sign-On (SSO)

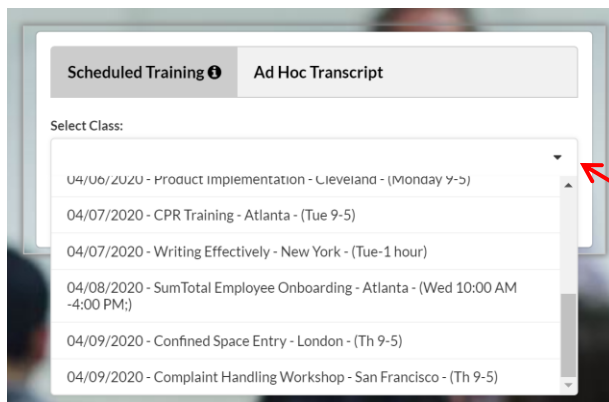
The Instructor is able to use single sign-on to log into rapidRoster. rapidRoster uses SAML 2.0 to communicate with the LMS and authenticate the login of rapidRoster.

To access rapidRoster on SumTotal using SSO go to the URL you were provided.

4. Select Class

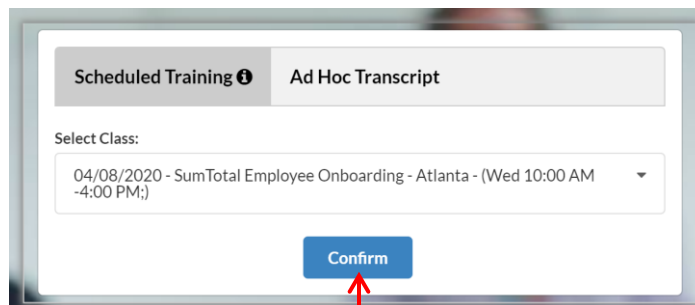
After the Instructor has submitted their username, password, and company they select the class they intend to administer. The list will contain class that are: instructor led, assigned to them, and in an “Open” status. The courses will be filtered by date, and will only display courses that are within the date range that your company has set. The default shows 30 days in the past and 14 days in the future.

- 1) Click the dropdown box under **Select Class**:
 - a. You can also start typing to filter the classes
 - b. The default shows 30 days in the past and 14 days in the future. Though your company have changed the class window.
- 2) **Select the Class** you are administering



Select Class dropdown menu

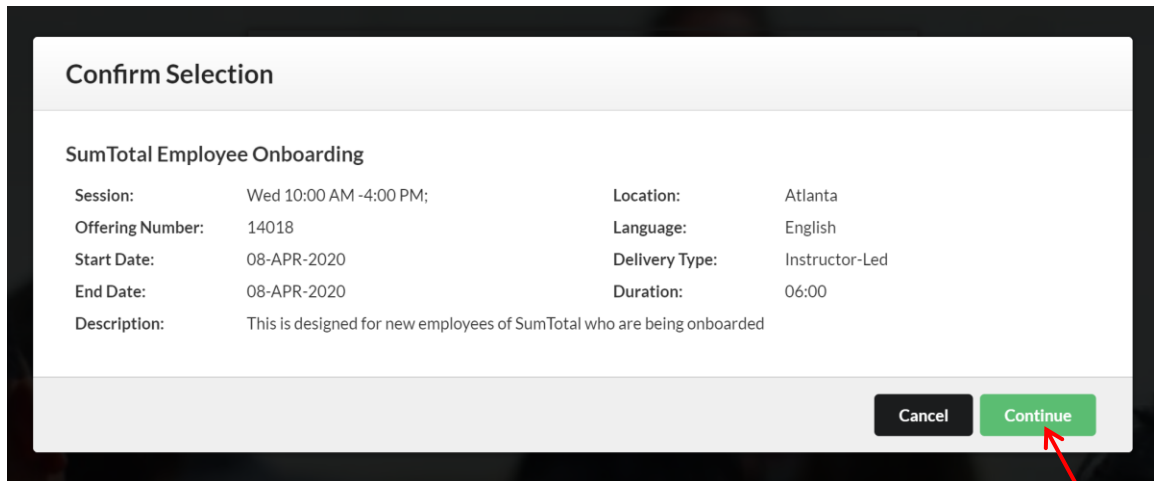
- 3) Click **Confirm**



Confirm

Select Class (cont.)

- 4) A dialog will appear, presenting you with additional details about the selected class and you will be prompted to confirm your selection
- 5) Click **Continue** to verify the class selected is correct



The image shows a 'Confirm Selection' dialog box. At the top, the title 'Confirm Selection' is in a light gray bar. Below this, the class name 'SumTotal Employee Onboarding' is displayed. A table of details follows, with two columns. The first column lists attributes: Session, Offering Number, Start Date, End Date, and Description. The second column lists values: Wed 10:00 AM -4:00 PM;, 14018, 08-APR-2020, 08-APR-2020, and 'This is designed for new employees of SumTotal who are being onboarded'. To the right of the table, another set of attributes and values is listed: Location (Atlanta), Language (English), Delivery Type (Instructor-Led), and Duration (06:00). At the bottom right of the dialog, there are two buttons: 'Cancel' (gray) and 'Continue' (green). A red arrow points from the word 'Continue' in the text below to the green 'Continue' button.

SumTotal Employee Onboarding			
Session:	Wed 10:00 AM -4:00 PM;	Location:	Atlanta
Offering Number:	14018	Language:	English
Start Date:	08-APR-2020	Delivery Type:	Instructor-Led
End Date:	08-APR-2020	Duration:	06:00
Description:	This is designed for new employees of SumTotal who are being onboarded		

Continue

Standard Features

1. Learner Check-In

Attendees will walk into the classroom and the Instructor will swipe or scan the barcode present on the attendee's badge using a scanner that is setup to the computer running rapidRoster. rapidRoster will talk to SumTotal and determine if the badge is associated with a valid user. The Instructor will also be able to see if the Learner is a Walk-in or Pre-registered ("Pre-reg").

- 1) **Swipe, scan, or find a Learner.** This populates the "Scan or enter badge ID" field
 - a. To find a Learner you can search for their First Name, Last Name, Organization, and/or ID (refer to [Advanced Features: 2. Finding a Learner](#) on page 14)
- 2) Click **CONFIRM**

Manage Roster - Scheduled Training

Course	Session	Offering Number	Start Date	End Date	Location	Duration
SumTotal Employee Onboarding	Wed 10:00 AM -4:00 PM;	14018	08-APR-2020	08-APR-2020	Atlanta	06:00

Learner Check-In

Scan or enter badge ID

CONFIRM

Advanced

Name	Check-In Date	Checked In?	Complete?	Type
Joe Smith	4/14/2020 5:16:54 PM	✓	—	Walk-in

Download Roster Report Mark All Complete

CONFIRM **Checked In?** **Complete?** **Type**

Learner Check-In (cont.)

- 3) A dialog with the Learner's information will pop up to verify the Learner
- 4) Click **Approve**
 - a. Click **Cancel** to reject their attendance and go back to registering participants

The Instructor can look at their information to verify that the attendee is who they claim to be and choose whether to approve their attendance.

Approve

Don't prompt for confirmation - The Instructor can also click the box so they do not have to go through this step every time an attendee swipes, scans, or is manually found. This is particularly useful for larger classes (>25 people).

- 5) After confirming the Learner, they will appear in the roster and they will be marked as **"Checked In"** with a ✓
- 6) You can also see if they are a **"Walk-in"** or were pre-registered (**"Pre-reg"**) for the course

Upon approval, there is a visual record of the check-in. When students exit the session, badges are swiped or scanned a second time, and the length of attendance is recorded in SumTotal. This will be denoted by a checkmark appearing under the "Complete?" column.

2. Learner Completes Course

There are two (2) ways to mark a Learner 'Complete': 1) Swiping/scanning/finding a Learner individually to mark them as 'Complete'. 2) Record the entire class as 'Complete' with a single click using the Mark All Complete button.


1) Individual Learner Complete

- a. At the end of the course you can mark individual Learners as completed by swiping, scanning, or finding a Learner.
- b. **Swipe, scan or enter the badge ID** of the Learner to be marked complete (alternatively, you can search for the Learner to be marked complete by clicking **Advanced** and then the **Find Learner** button).

Find Learner

Mark All Complete

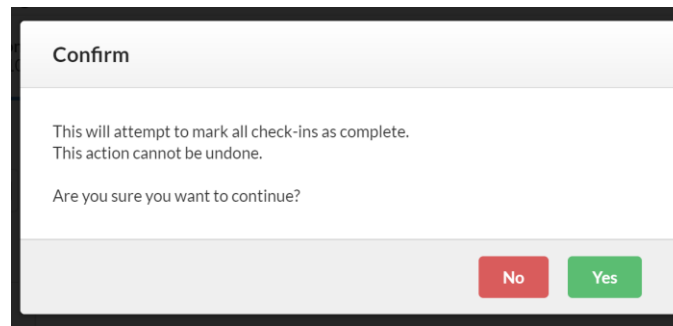
- c. A confirmation pop-up will display
 - i. Click **Yes** to confirm their completion
 - ii. Click **No** to reject their completion

- d. If completion is confirmed, upon selection of the **Yes** button, the screen will refresh to display the main screen showing the user as completed with a  under the Complete column

Learner Check-In (cont.)

2) Mark All Complete

- a. At the end of the course you can mark all Learners as 'Complete' with a single by clicking the **Mark All Complete** button
 - i. This is useful for larger classes (>25 people)
 - ii. **WARNING**: This action cannot be undone
- b. In the popup, click **Yes** to mark all 'Complete'

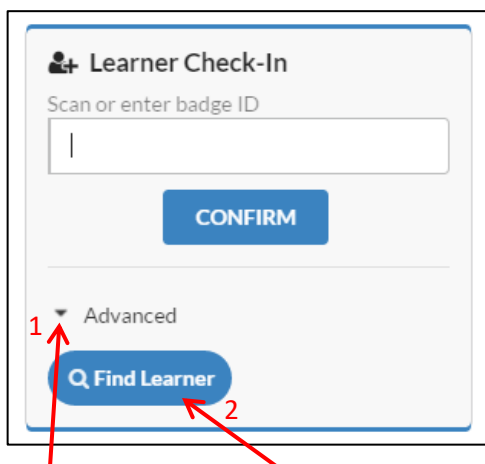


Advanced Features

1. Finding a Learner

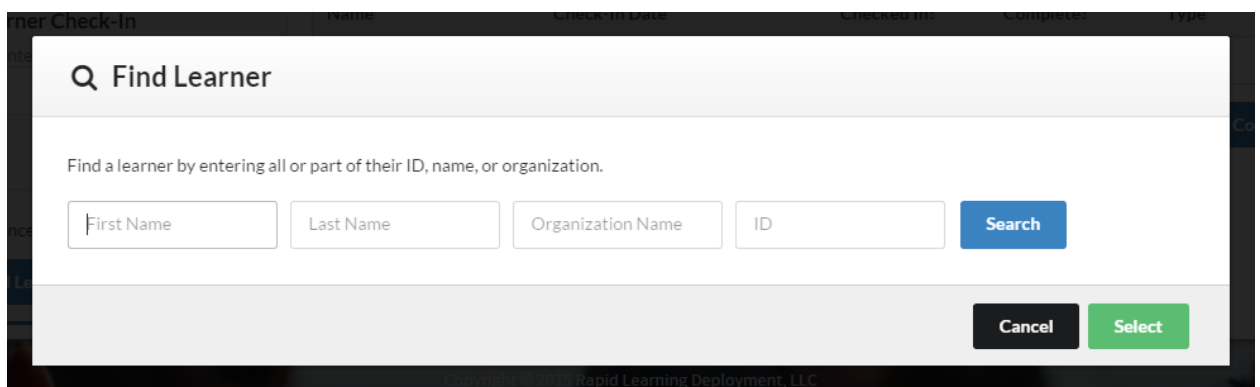
The Find Learner feature is used for when employees either forgot their badge ID or the company does not use badges. To find the Learner you are searching for you can search for the Learner's First Name, Last Name, Organization Name, and/or ID.

- 1) Click **Advanced** to reveal the option to Find Learner
- 2) Click **Find Learner**



Advanced **Find Learner**

- 3) To search for a Learner enter their **First Name**, **Last Name**, **Organization Name**, and/or **ID**
- 4) Click **Search**



Finding a Learner (cont.)

- 5) Click the radio button next to the **Learner** you are looking for
- 6) Click **Select**
 - a. Or click **Cancel** to go back

Find Learner

Find a learner by entering all or part of their ID, name, or organization.

mark Last Name Organization Name ID Search

	ID	First Name	Last Name	Organization
<input checked="" type="radio"/>	MRAMSEY	Mark	Ramsey	rapidLD
<input type="radio"/>	MZOLAR	Mark	Zolar	rapidLD
<input type="radio"/>	E7388403	MARK	LITTLE-CLARK	102ND AVENUE_EXT_195500236926

Cancel Select

Select User

Select

- 7) Click **CONFIRM** on the Manage Roster page
- 8) Click **Approve** to verify the Learner's information.
 - a. The Learner will now appear in the class' roster and be marked as Checked In with a

Confirm Learner

Mark Ramsey
Company: rapidLD
Job Title: N/A
Is Manager: No
Supervisor: N/A

☐ Don't prompt for confirmations

Create Badge Cancel Approve

Approve

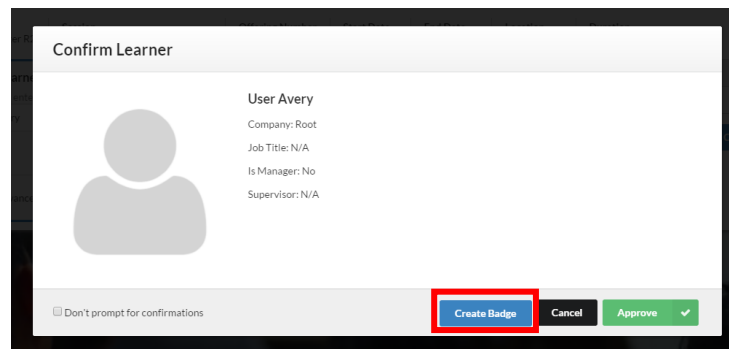
2. Creating a Printed Badge

The Create Badge feature is used to create a sticky name tag for the Learner. This feature can also be used for tent cards to go on a table for the Learner (contact rapidLD to configure this setting). The badge will be populated with the Learner's First Name, Last Name, and Organization (these fields can be edited to whatever you want to display).

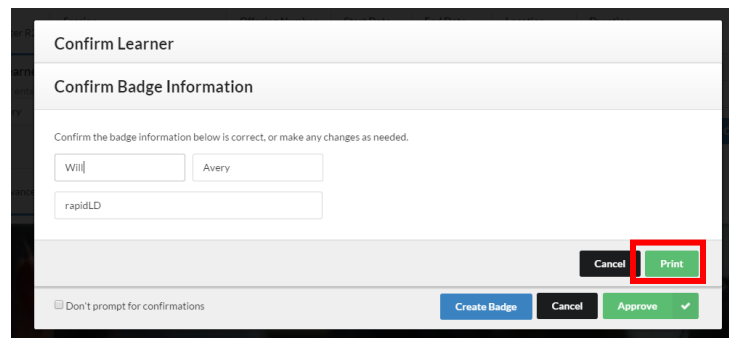
Creating a printed badge can be done 2 ways:

1) During the Check-In process

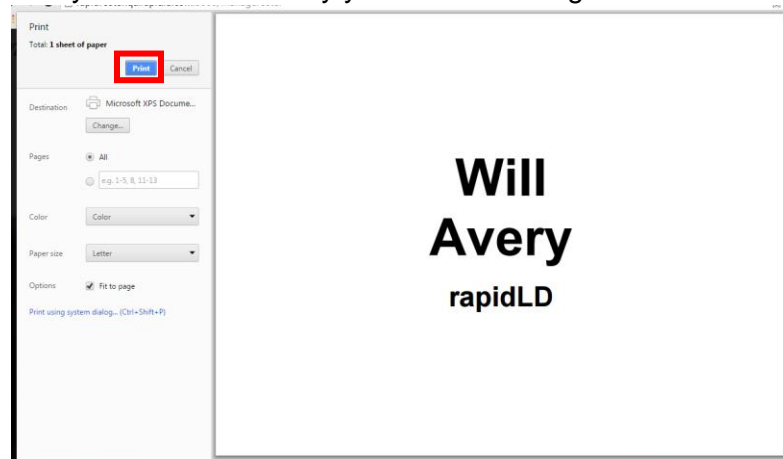
- a. Click **Create Badge** on the Confirm Learner pop-up.



- b. You can change their First Name, Last Name, and Company or keep it the way it is and click **Print**.




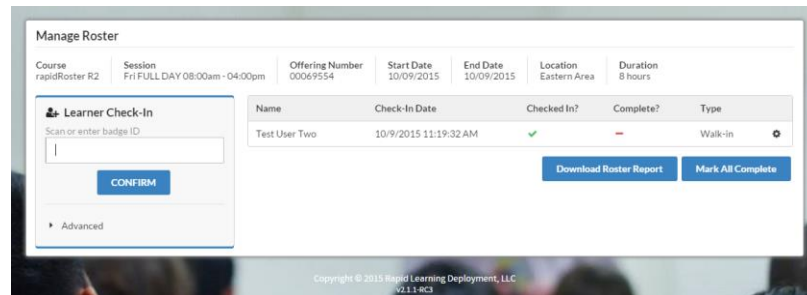
- c. Verify that this is the way you want the badge to look and click **Print**.



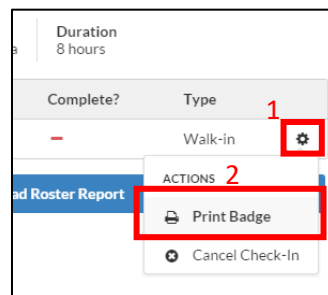
Creating a Printed Badge (cont.)

2) After the Check-In process

- a. On the Manage Roster page, click the  button next to a Learner's information.



- b. Click **Print Badge** and go through the same steps to print the badge.

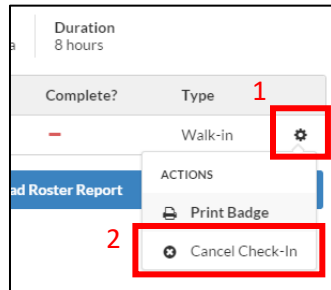


- c. You can change their First Name, Last Name, and Company or keep it the way it is.
- d. Click **Print**
- e. Verify that that is the way you want the badge to look and click **Print**.

3. Cancel Check-In

The Cancel Check-In feature is used to cancel the check-in of either a Learner that was incorrectly checked in or when the Learner leaves prematurely and you do not want to give them credit for the training.

- 1) On the Manage Roster page, click the ⚙ button next to a Learner's information.



- 2) Click **Cancel Check-In**
- 3) Record will disappear from the rapidRoster UI
- 4) Registration will be marked as 'Cancelled' in SumTotal

4. Tablet Support

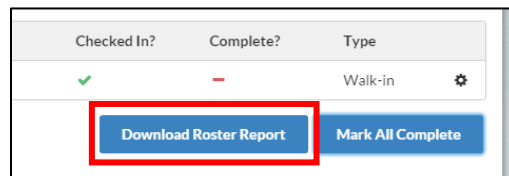
You are now in the rapidRoster application on your tablet. Use the application the same way you use the desktop application.

- 1) iPad with Retina Display (or better)
 - a. Tablet must have a resolution of at least 800 x 1200 (pixels)
- 2) On your tablet **open your Internet browser** (Google Chrome or Safari)
- 3) **Lock your tablet in Landscape mode**
- 4) **Enter the provided URL** in your Internet browser to access rapidRoster

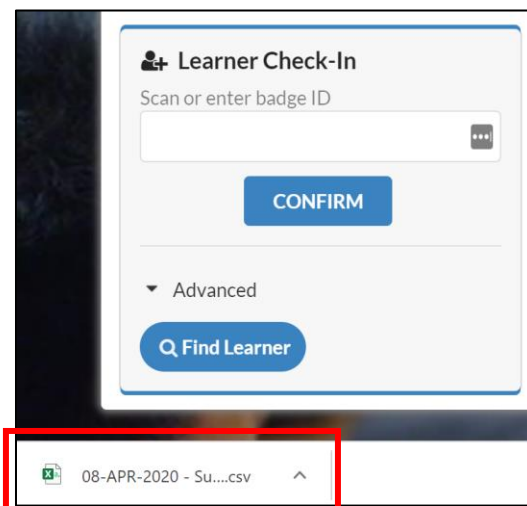
5. Download Roster Report

At any time during the check-in process or upon completion of the course the Instructor can download the Roster Report. The Instructor can see all the information they see on the Manage Roster page in the spreadsheet and save it to their computer.

- 1) On the Manage Roster page, click the **Download Roster Report**



- 2) The file will be downloaded onto the computer as a **.csv** file
- 3) **Click on the file** to open the Roster Report in Microsoft Excel or a comparable spreadsheet application



- 4) (optional) Save the Roster Report to your computer

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