

Quick Start Guide for Program Administrators

Instructions for Getting Started

Welcome to the OnlineCOR.net!

This Guide includes an overview of the OnlineCOR.net application and outlines required steps for an organization administrator when planning and setting up the OnlineCOR.net environment. This Quick Start Guide is designed to provide the necessary information you will need to get started. Specific help related to the application may be found on each page by clicking the **Help** button located in the upper right-hand corner of the screen on each page. Help documents are specific to the current page you are in.

Accessing the application:

The web address for accessing OnlineCOR is www.OnlineCOR.net. Please see the supported browsers and operating system in the “System Requirements” document included as part of this introduction package. Once on the website click the “Members Entrance” button in the upper right-hand corner of the screen. You will be redirected to the log-in page where you will need to enter your user id and password. As the organization administrator you will automatically be directed to the administrators section of the application. As you create new users with different access privileges each user will enter at the highest level they have access to. For teachers that means they will start in their classroom while administrators will access the site, program or level where they have access. If a user is both an administrator and teacher the user will enter on the Teachers main menu but can switch between the teachers and administrators portion of the application by clicking the **Teacher** and or **Administrator** button at the top of the screen. We recommend creating www.OnlineCOR.net as a favorite site for easy access in the future.

Navigating and entering data:

The OnlineCOR window is arranged with a navigation tree on the left-hand side of the screen for selecting specific sites, classrooms, teachers, children, etc. with the remainder of your screen reserved as a workspace for viewing, adding, editing, and generating reports. Screen sections can be enlarged or reduced by holding down the left button on your mouse on the field separators and dragging the bar to the left or right to maximize or minimize that portion of the screen. A “+” button appears next to items in the navigation tree that can be expanded to show additional levels such as classrooms, sites, etc. To contract a level click the “-“button next to a level.

When adding information you may click a field to select for entering data or use the Tab button on your keyboard to advance to the next field. To move backwards when entering data use the Shift + Tab buttons. For fields with a pre-populated list click the drop down arrow in the field and select your answer by clicking the correct response. As you become

familiar with entries in the various drop down list selections may be made by simply entering the first letter of the field variable.

Instructions for Getting Started

1. Edit Organization Information. *
2. Create Sites and Assign Site Administrators. *¹
3. Create Classrooms/Specialist
4. Create Teachers.
5. Create Children.

*An organization administrator **must** complete steps 1 and 2 on the following pages; step 3 and Step 4 may be completed by a Site Administrator; and step 5 may be delegated to a teacher. On-screen help is available once you have logged into the application by clicking the Help button.

¹ If your organization has hierarchy levels between the site and organization then the organization administrator must complete the next level down from the organization level. Once that information is completed, creating lower level hierarchy information may be delegated to the administrator of that hierarchy.

Step 1. Edit Organization Information	
Description:	Organization information refers to the demographic information about your school, program, or agency and is used when Organization level reports are generated. As part of editing your organization information you will also edit information about the organization administrator, select application options that affect how your software is used, and define user defined fields (if applicable). The OnlineCOR software is user id and password protected. Each time you access the application you must enter a valid user id and password to open the application and access your data. As the organization administrator you have administrative access to all group levels associated with your organization.
Instructions for Editing Organization Information	<ol style="list-style-type: none"> 1. Login to the OnlineCOR application. 2. From the navigation tree on the left side of the screen click the name of your organization. 3. Click the Edit tab. 4. Edit the General information and Contact information by entering information about your program or agency. Fields with a red button beside them indicate required information. 5. Click Save.
Instructions for Adding/Editing administrative users	<ol style="list-style-type: none"> 1. From the navigation tree on the left side of the screen click the name of your organization. 2. Click the Manage tab. 3. Click the Users menu option. 4. To add a new user click the Add button located at the bottom of the <i>Current User's</i> grid, to edit an existing user click the selection box next to the user's name and click the Edit button. (Users entered at the organization level will have access to all levels beneath the organization in the administration navigation tree. 5. Update the <i>User ID</i> field by entering the new user information or changing the existing user id information. 6. Enter the new password by updating the <i>System Password</i> field. 7. Enter the new password again in the <i>Confirm Password</i> field. 8. If the user is to have read-only access (users with read-only access cannot access detailed information on children, add, edit or update information). 9. Click Save. (Entries in PIN and Confirm PIN fields are reserved for users of the COR-CA a PDA based application that hot syncs with the web application).

OnlineCOR.net can be arranged by different hierarchy groups to meet the data aggregation and reporting needs of your organization. The top level, organization, is always the highest level and typically corresponds to the agency licensing the OnlineCOR. The bottom two levels site and classroom are required as children are enrolled in classrooms and that classroom is assigned to a physical building or site. There can be up to 4 additional hierarchy groups in between the organization and the site depending on your organizations needs. When working with organization information the menu tabs will always be; Summary; Manage, Add, Edit and Reports. Where add is used to add the group immediately underneath the organization level.

Step 2. Create Sites and Administrators	
Description:	<p>A site is an individual building comprised of one or more classrooms. Individuals designated as site administrator are able to manage teachers, classrooms, and children enrolled at that site as well as create aggregated reports for that Site. As part of creating a site you will assign a site administrator for each site and set up the report period information for that site. Once this is completed the new site administrator can create classrooms, create and assign teachers, or edit the site information.</p> <p>As new sites are created an archived classroom and a pending classroom are automatically created for each site. Children who are removed from a classroom are automatically assigned to the archived classroom for that site. From within the archived classroom the site administrator can permanently remove the child, keep the child in the archived classroom or transfer the child to another class at the same site or another site. The pending classroom is used to move a child to a new site where the child is enrolling but a classroom assignment is either unknown or has not occurred.</p>
Instructions for Creating Sites:	<ol style="list-style-type: none"> 1. Login to the OnlineCOR application. 2. From the navigation tree on the left side of the screen click the name of your organization. 3. Click the Add Site tab. 4. Complete the <i>School/Site Information</i> form. Required fields are marked with a red button. 5. The application will populate the start and end date of periods 1, 2, and 3 by entering dates in those based on the school year selected. (School years by default are set to run from 08/01 to 07/31. Change each date to match the start and end date of each report period for the current site. If this site operates a full year program complete period 4 with the start and end date of the 4th period 6. Click Save. 7. Repeat steps 3 – 6 for each new site.
Instructions for Creating Site Administrators:	<ol style="list-style-type: none"> 1. From the navigation tree on the left side of the screen click the site name. 2. Click the Manage tab. 3. Click the <i>Users</i> menu link. 4. The screen will display any users currently assigned to the selected site in the <i>Current User's</i> grid.. 5. Click the Add button under the <i>Current Users</i> grid to add a

	<p>new administrator.</p> <ol style="list-style-type: none"> 6. Complete the required field information in the Demographic information and Account information sections.^{2,3} 7. Click Save. 8. Repeat steps 5-7 for each new administrator.
<p>Assigning existing users to another site – users may be assigned to multiple sites. When a user assigned to multiple sites logs in they must use the navigation tree to select the site, classroom, etc. they wish to work with.</p>	<ol style="list-style-type: none"> 1. Login to the OnlineCOR application. 2. From the navigation tree on the left side of the screen click the organization, site, or other level where the user is currently assigned. 3. Click the Manage tab. 4. Click the <i>User's</i> menu link. 5. In the <i>Current User's</i> grid use the navigation buttons until the user's name you will be working with is visible in the grid. 6. Click the selection box next to the user's name. 7. Click the Assign button. 8. Once the Assign button is clicked a navigation tree appears below the <i>Current User's</i> grid. 9. Click the "+" or "-" button to expand or contract the groups, sites, etc. until you locate the site or group where you wish to assign the user. 10. Click on the name of the site, group where the user is to be assigned. 11. Click the Assign button. 12. Click Ok.

² The PIN and Confirm PIN fields are reserved for users of the COR-CA application and are not required for users to access the web.

³ The read-only selection box limits the access and viewing rights of the administrator to site and summary information. The suspended box will temporarily suspend the user from accessing the OnlineCOR.

Step 3: Create Classrooms/Specialists	
Description:	<p>Classrooms are created to allow teachers to manage class information, to enroll children, and/or to generate class level reports. Teachers may be linked with more than one classroom. Each time the teacher logs in he or she will see the classroom(s) they are linked to.</p> <p>There are two options for this step; Option 1 – Create classes or Option 2 – Delegate this step to a site administrator. <u>Note: Sites must be created before creating classrooms.</u></p> <p>When creating a classroom you will be asked to designate the classroom type as classroom or specialist. The specialist designation should be reserved for creating caseloads for outside interventionist who regularly work with specific children in classrooms as a result of the child’s IEP, IFSP, or other special services. Children can be enrolled in a typical classroom as well as in the caseload of one or more specialist. The specialist category provides a way to grant individuals outside of the classroom access to individual children’s information without compromising the privacy of other children enrolled in the class.</p>
Option 1: Instructions for Creating Classrooms	<ol style="list-style-type: none"> 1. Login to the OnlineCOR application. 2. From the navigation tree on the left side of the screen click the <u>site</u> where the new classroom will be located. 3. Click the Add Classroom tab. 4. Enter the new classroom name. 5. The school year of the classroom is based on the current school year assigned to the site when it was created. 6. Select the appropriate classroom type from the drop down list (Classroom, Specialist). 7. If User Defined fields are to be populated select the appropriate values in each drop down list. 8. Click the Save button. 9. Repeat steps 3 – 8 for each new classroom added to the current site. To switch to another site start with step 2 above.
Option 2: Delegate the Step	<p>In order to use this option, you must have created a site administrator for the site and assigned the site administrator access security to the site.</p> <ol style="list-style-type: none"> 1. After creating the site administrator account, have the administrator login using their user id and password. 2. Have them review the Site Administrator’s Quick Start Guide and follow the instructions for creating classrooms.

Step 4: Create Teachers

Description:	Once classrooms have been created you are now ready to create and assign teachers to the classroom. You should only create and assign teachers to a classroom that will actually be logging in to the OnlineCOR. If there are other teachers in the classroom but you do not want to provide access to the OnlineCOR they can be added as additional observers by the teacher with access when managing the classroom information.
Instructions / Option 1:	<p style="text-align: center;"><u>Organization Administrator creates teacher record</u></p> <ol style="list-style-type: none">1. Login to the OnlineCOR application.2. From the navigation tree on the left side of the screen select the <u>classroom</u> where the new teacher will be assigned by clicking on the classroom name.3. Click the Manage tab.4. Click the <i>manage user's</i> menu link. A listing of users currently assigned to the classroom will appear in the <i>Current Users'</i> menu grid.5. Click the Add button.6. Enter the new teacher's demographic information by completing the <i>First Name</i>, <i>Last Name</i> and <i>E-mail</i> fields. (Note: for confidentiality reasons it is not necessary that you enter the teacher's full last name. The first initial will be acceptable if necessary).7. Next enter the teacher's login credentials by completing the <i>User ID</i>, <i>Password</i> and <i>Confirm Password</i> fields. (The user id must be unique). The <i>PIN</i> and <i>Confirm PIN</i> fields are only for users of the COR-CA, a PDA based application designed to record and score anecdotes using a PDA for entry purposes.8. Designating a teacher as read-only will not provide sufficient application access privileges to manage their classroom, the read-only option should only be used for administrative users. Use the Suspended option for teachers who will be away from the school for an extended period. Designating a user account as suspended allows you to maintain the user account but prohibits the user from accessing the system during their extended leave.9. Select the teacher's role in the classroom from the <i>Teacher Role</i> drop down field. (Note if the classroom type is designated as specialist the values in the teacher role drop down list are physical therapists, speech therapists, occupational therapists, disability coordinator, case manager, and other.10. Click the Save button. The new user now appears in the <i>Current User's</i> grid.

	11. Repeat steps 5-10 if additional teachers are to be assigned to the current classroom.
Instructions / Option 2:	<p style="text-align: center;"><u>Delegate this step</u></p> <p>In order to select this option, you must have created and assigned a site administrator for the site where the classroom is located.</p> <ol style="list-style-type: none"> 1. After creating the site administrator account, have the administrator login using their user id and password. 2. Have them review the Site Administrator's Quick Start Guide and follow the instructions for creating teachers.

Step 5: Create Children

Description:	<p>When creating children you will be actively enrolling children into an existing classroom. As part of entering child information you will need the following required information - first name, date of birth, gender, age group, assessment level and whether the child has an IEP/IFSP. You may also enter information about the child's last name, middle initial, nickname, language, primary and secondary disability, language, ethnicity, funding group, and child id. Creating children must be completed by those assigned to the classroom or through data import.</p> <p>Information entered in the Assessment Instrument field will determine what categories, items, and levels are displayed when scoring anecdotes. Entries in the IEP/IFSP, Age Group, Gender, Ethnicity, Language and Funding fields can be used for grouping data when generating Outcome Reports at the Class level and higher.</p> <p>For programs completing data for OSEP reporting purposes, if a child is indicated as having an IEP/IFSP, you <u>must</u> enter the child's entry date in the space provided prior to saving the child's profile. Exit dates refer to the date the child actually left the program and can only be entered once all entry level skills have been completed.</p> <p>The OnlineCOR has additional (not required) information that may be entered and maintained for each child. The User Defined fields enable users to keep information specific to a child where there is currently no other field available, the Family Information includes information about the child's primary caregivers. Both the User Defined fields and Family Information may be used when generating specific reports (OnlineCOR premium version only).</p>
Instructions for Creating Children:	<ol style="list-style-type: none">1. Login to OnlineCOR.net.2. Select the classroom from the navigation tree by clicking on the classroom name.3. There are two ways to manage the classroom; 1) click the Account tab and then click the <i>Add, edit, or remove children from your classroom</i> menu link or 2) click the <i>Manage your class information</i> from the Home page found in the Account section.4. Click the Add button found in Section 2 "Add a child" on the Manage Classroom page.5. Complete the child's profile by completing the necessary fields in the sections labeled Demographic Information, Child ID, IEP/IFSP, Age Group/Instrument.6. Click the Save button.

	7. Repeat steps 4 – 6 to enter additional children.
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Congratulations! You have completed the setup process for your program. For additional instructions on managing your information, generating reports, transferring children or editing information, please refer to the Help file for OnlineCOR. Each page in the OnlineCOR has a help document specific to the page you are currently working in.

Quick Start Guide for Site Administrators

Instructions for Getting Started

OnlineCOR.net

Welcome to the OnlineCOR.net!

This Guide includes an overview of the OnlineCOR.net application and outlines required steps for a site administrator when planning and creating classrooms, teacher user accounts, and specialist caseloads. This Quick Start Guide is designed to provide the necessary information you will need to get started. Specific help related to the application may be found on each page by clicking the **Help** button located in the upper right-hand corner of the screen on each page. Help documents are specific to the current page you are in.

Instructions for Getting Started:

1. Create Classrooms/ Specialist Caseloads.*
2. Create Teachers.
3. Create Children.

*A site administrator **must** complete step 1 and step 2; step 3 may be delegated to a teacher.

Step 1: Create Classrooms/Specialist Caseloads	
Description:	<p>Classrooms are created to allow teachers to manage class information, enroll children, and/or to generate class level reports. Teachers may be linked with more than one classroom. Each time the teacher logs in he or she will see the classroom(s) they are linked to.</p> <p>When creating a classroom you will be asked to designate the classroom type as classroom or specialist. The specialist designation should be reserved for creating caseloads for outside interventionists who regularly work with specific children as a result of the child's IEP, IFSP, or other special services. Children can be enrolled in a typical classroom as well as in the caseload of one or more specialist. The specialist category provides a way to grant individuals outside of the classroom access to individual children's information without compromising the privacy of other children enrolled in the class.</p>
Instructions for Creating Classrooms	<ol style="list-style-type: none"> 1. Login to the OnlineCOR application. 2. From the navigation tree on the left side of the screen click the <u>site</u> where the new classroom will be located. 3. Click the Add Classroom tab. 4. Enter the new classroom name. 5. The school year of the classroom is based on the current school year assigned to the site when it was created. 6. Select the appropriate classroom type from the drop down list (Classroom, Specialist). 7. If User Defined fields are to be populated select the appropriate values in each drop down list. 8. Click the Save button. <p>Repeat steps 3 – 8 for each new classroom added to the current site. To switch to another site start with step 2 above.</p>

Step 2: Create Teachers

Description:	Once classrooms have been created you are now ready to create and assign teachers to the classroom. You should only create and assign teachers to a classroom that will actually be logging in to the OnlineCOR. If there are other teachers in the classroom but you do not want to provide access to the OnlineCOR they can be added as additional observers by the teacher with access when managing the classroom information.
Instructions: Creating Teacher Accounts	<ol style="list-style-type: none">1. Login to the OnlineCOR application.2. From the navigation tree on the left side of the screen select the <u>classroom</u> where the new teacher will be assigned by clicking on the classroom name.3. Click the Manage tab.4. Click the <i>manage user's</i> menu link. A listing of users currently assigned to the classroom will appear in the <i>Current Users'</i> menu grid.5. Click the Add button.6. Enter the new teacher's demographic information by completing the <i>First Name</i>, <i>Last Name</i> and <i>E-mail</i> fields. (Note: for confidentiality reasons it is not necessary that you enter the teacher's full last name. The first initial will be acceptable if necessary).7. Next enter the teacher's login credentials by completing the <i>User ID</i>, <i>Password</i> and <i>Confirm Password</i> fields. (The user id must be unique). The <i>PIN</i> and <i>Confirm PIN</i> fields are only for users of the COR-CA, a PDA based application designed to record and score anecdotes using a PDA for entry purposes.8. Designating a teacher as read-only will not provide sufficient application access privileges to manage their classroom, the read-only option should only be used for administrative users. Use the Suspended option for teachers who will be away from the school for an extended period. Designating a user account as suspended allows you to maintain the user account but prohibits the user from accessing the system during their extended leave.9. Select the teacher's role in the classroom from the <i>Teacher Role</i> drop down field. (Note if the classroom type is designated as specialist the values in the teacher role drop down list are physical therapists, speech therapists, occupational therapists, disability coordinator, case manager, and other.)10. Click the Save button. The new user now appears in the <i>Current User's</i> grid. Repeat steps 5-10 if additional teachers are to be assigned to the current classroom.

Step 3: Create Children

Description:	<p>When creating children you will be actively enrolling children into an existing classroom. As part of entering child information you will need the following required information - first name, date of birth, gender, age group, assessment level and whether the child has an IEP/IFSP. You may also enter information about the child's last name, middle initial, nickname, language, primary and secondary disability, language, ethnicity, funding group, and child id. Creating children must be completed by those assigned to the classroom or through data import.</p> <p>Information entered in the Assessment Instrument field will determine what categories, items, and levels are displayed when scoring anecdotes. Entries in the IEP/IFSP, Age Group, Gender, Ethnicity, Language and Funding fields can be used for grouping data when generating Outcome Reports at the Class level and higher.</p> <p>For programs completing data for OSEP reporting purposes, if a child is indicated as having an IEP/IFSP, you <u>must</u> enter the child's entry date in the space provided prior to saving the child's profile. Exit dates refer to the date the child actually left the program and can only be entered once all entry level skills have been completed.</p> <p>The OnlineCOR has additional (not required) information that may be entered and maintained for each child. The User Defined fields enable users to keep information specific to a child where there is currently no other field available, the Family Information includes information about the child's primary caregivers. Both the User Defined fields and Family Information may be used when generating specific reports (OnlineCOR premium version only).</p>
Instructions for Creating Children:	<ol style="list-style-type: none">1. Login to OnlineCOR.net.2. Select the classroom from the navigation tree by clicking on the classroom name.3. There are two ways to manage the classroom; 1) click the Account tab and then click the <i>Add, edit, or remove children from your classroom</i> menu link or 2) click the <i>Manage your class information</i> from the Home page found in the Account section.4. Click the Add button found in Section 2 "Add a child" on the Manage Classroom page.5. Complete the child's profile by completing the necessary

	fields in the sections labeled Demographic Information, Child ID, IEP/IFSP, Age Group/Instrument. 6. Click the Save button. 7. Repeat steps 4 – 6 to enter additional children.
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Congratulations! You have completed the setup for your site. For additional instructions on managing your site information, generating reports, transferring children or editing information, please refer to the Online Help documents.

System Requirements

The OnlineCOR.net is accessed via the Internet and can be accessed from any Internet connection (subject to minimum system requirements). Reports are generated in PDF format and require Acrobat Reader™ on the PC accessing the Internet. Acrobat Reader is a free download and can be accessed from www.adobe.com. Please consult the following list for supported configurations. If your computer and/or browser are not listed here please consult technical support at 1-888-386-3822 for assistance.

Personal Computer (PC)
Windows 2000 – Internet Explorer 7.0, Firefox 1.x, 2.x
Windows XP – Internet Explorer 7.0, Firefox 1.x, 2.x
Windows Vista – Internet Explorer 7.0, Firefox 1.x, 2.x
MAC
OS 9.x IE 5.1, Firefox 1.x, 2.x
OS 10.x IE 5.2, Firefox 1.x, 2.x

Screen Resolution:

The website is designed for a minimum screen resolution of 800X600 pixels. If you find yourself scrolling down or from side to side change the screen resolution so that it meets the minimum specifications.

To change the screen resolution on your PC:

1. Place the mouse cursor in a blank area of your desktop (it must not be pointing to any application).
2. Right-click the mouse button.
3. Select **Properties** from the drop-down menu.
4. Click the **Settings** tab.
5. Locate the Screen Area section.
6. Move the sliding bar to set the screen area to “800 by 600 pixels” or higher.
7. Click **OK**.
8. Click **Yes** to accept the change(s).
9. Reboot your computer if necessary.

To change the screen resolution on a Mac:

1. Click the **Apple Menu**.
2. Click System Preferences.
3. Click Displays.
4. Locate the Resolution Area section and highlight 800X600 or higher.
5. Close the window.