Opportunity Creator QuickStart Guide

Working With Cohorts

This guide explains how to:

A. Differentiate among the sub-sections of the Cohort section in the Opportunity Builder
B. Move learners from being listed as Interested to being listed as In Cohort
C. Manually add learners to the Cohort
D. Remove a learner from the Cohort
E. Add learners to the Cohort in bulk
F. Export the Cohort list to a spreadsheet

NOTES

• An Opportunity’s Cohort is located in section 4 of the Opportunity Builder.
• The Cohort section of the Opportunity Builder can be modified when creating a new Opportunity or when editing an existing Opportunity.
• When viewing a previously created Opportunity in the read-only view, the Cohort section shows only those learners who are in the Cohort (not Interested learners).
• NOTE: The Cohort for Course Opportunities is automatically populated by information from the Banner system. No edits are possible.
A. Differentiating the sub-sections within the Cohort section of in the Opportunity Builder

1. Interested – Learners in this section are those who have found this opportunity in the database and have indicated interest by clicking the plus sign, which adds the opportunity to their Timeline as a potential upcoming activity. Learners listed as “interested” do not get the Opportunity added to their 360 visualization.

2. In Cohort (Educator-Added) – Learners in this section have been added or moved from Interested to In Cohort by the educator(s) who own(s) the opportunity. The Opportunity will be added to the 360 visualization for all learners who are in the Cohort.

3. In Cohort (Learner-Added) – Learners listed in this section have themselves changed the Opportunity status from Interested to In Cohort by indicating they are “doing this” or “did this” in response to a system prompt.
B. Moving learners from Interested to In Cohort

1. **Click Add All to add all learners** listed under the Interested heading.

2. **Click the plus sign to add an individual learner** under the Interested heading.

**NOTE:** The Cohort for Course Opportunities is automatically populated by information from the Banner system. No edits are possible.
C. Manually adding learners to the Cohort

1. **Type the name of the learner** to be added

![Image of interface showing search for learners to add to cohort]

2. As you type, the database will display matches. When the target name appears in the list, **click the plus sign corresponding to the name.**
D. Removing a learner from the Cohort

1. **While in Edit mode, click the X that corresponds with the name** to be removed. **NOTE:** When the Opportunity is open in read-only mode, X is not be displayed (as shown below). You must be in Edit mode to edit the Cohort.

No X when viewing the Opportunity in read-only mode.
E. Adding learners to the Cohort in bulk

1. Download the spreadsheet template

**Click Download Template.** When the dialogue box opens, click OK to open the spreadsheet template with Microsoft Excel (default).
2. Add learner email addresses to the spreadsheet template.

Enter or copy the email addresses (Northeastern only) into Column A of the spreadsheet template. NOTE: Non-Northeastern email addresses will produce an error message and will not be included in the upload.

The learner’s email address is required. Name is optional. Any names that are added without an email address will not be uploaded.

Save the file to your hard drive with a name and location that will allow you to easily find it for upload.

Kaleena Seeley will not be uploaded because there is no email address associated with this name. A valid Northeastern email address is required for each learner.

Only Northeastern email addresses will work. Non-Northeastern email addresses will produce an error message and will not be uploaded.

Click link to download a spreadsheet containing the email addresses that were not uploaded.
F. Exporting the Cohort list

1. Click Export Learner List

With the Opportunity open in Edit mode, click Export Learner List. NOTE: When viewing the Opportunity in read-only mode, Export is not available.

When the dialogue box opens, click Save File to save the CSV file, titled Opening Participants, to your hard drive.