



# Rostering Manual

August 28 2025 Edition

Copyright © 2025 by Charmtech Labs LLC.  
All right reserved. Capti® is a registered trademark  
of Charmtech Labs LLC.



# Table of Contents

<b>ROSTERING OVERVIEW.....</b>	<b>3</b>
Integrations.....	3
Security and Privacy.....	3
Database Entities.....	4
<b>MANUALLY MANAGED ROSTER.....</b>	<b>8</b>
Add a single new member.....	8
Add members from a file.....	9
Add a new class.....	12
Add a new location.....	12
Add students to class from a list.....	13
Add students to class from a file.....	14
Managing member accounts.....	15
Removing members.....	16
<b>SIS INTEGRATION.....</b>	<b>17</b>
Sync from ClassLink or SFTP (OneRoster).....	17
Sync using Clever™.....	21
Troubleshooting.....	23
<b>LMS INTEGRATION.....</b>	<b>25</b>
Schoology.....	25
Google Classroom.....	27
Troubleshooting.....	29

# ROSTERING OVERVIEW

---

## Integrations

Capti can integrate with your SIS using the following methods

	Single Sign On	Sync Roster	Import Users
<a href="#">Clever</a>	✓	✓	✓
<a href="#">ClassLink</a> w/OneRoster	✓	✓	✓
<a href="#">SFTP</a> w/OneRoster	N/A	✓	✓
<a href="#">Google Classroom</a>	✓	✓	✓
<a href="#">Schoology</a>	✓ <small>LTI</small>	N/A	✓ <small>LTI</small>
<a href="#">Manual user management</a>	N/A	N/A	✓

To migrate your organization account from one type of integration to another (e.g. Clever to ClassLink) please contact [support@capti.com](mailto:support@capti.com).

---

## Security and Privacy

At Capti, our team is committed to upholding strict security and privacy standards to safeguard your data. We ensure full compliance with applicable laws, regulations, and industry best practices, while simultaneously delivering exceptional service.

### ***Policies***

Our security policies are structured around strict access control and consistent application of security controls. We enforce least privilege and need-to-know principles. Our security posture is dynamic, with continuous improvement embedded into our operational model, ensuring resilience against emerging threats.

## ***Proactive Product Security***

Our product security strategy encompasses regular audits, rigorous vulnerability scanning and deep code analysis to identify and mitigate risks. We use services of a PCI-approved scanning vendor Sysnet Global Solutions for comprehensive assessments, ensuring Capti fortified against known and emerging vulnerabilities.

## ***Comprehensive Data Safeguards***

To prevent unauthorized access, we encrypt data at rest and in transit. We use TLS 1.2 or higher everywhere data is transmitted. Our encryption keys are managed via AWS Key Management System (KMS).

## ***Data Privacy by Design***

We maintain regulatory compliance with relevant data protection laws and frameworks, including FERPA, through comprehensive data governance practices. Our Privacy Policy is crafted with transparency in mind, detailing our data processing activities and the controls available to our users to manage their personal information.

## ***Transparent Reporting***

We provide detailed compliance and security reports, including SOC 2, VPAT, HECVAT, and 1EdTech Data Privacy Certificate, upon request. These documents offer insights into our security infrastructure and compliance posture, underscoring our commitment to transparency.

---

# **Database Entities**

## ***Locations***

Locations can represent a school in a district for example, or a building on campus.

You can view the list of Locations in your organization by opening the **Manage** → **Locations** screen.

You can view or edit member's Location enrollment by opening the **Manage** → **Members** screen, clicking on the "Actions" menu next to member name, and selecting the "Location Enrollment" option.

## ***Classes***

Classes can be course sections, or custom groups. Each class is assigned to a single location.

You can view the list of classes in your organization by opening the **Manage** → **Classes** screen.

Click the **New Class** button to create a new class or import a class from Google Classroom. There is no limitation on the number of classes that can be created.

Class	Period	Code	Grade	Students	Actions
Class 2 Doe John, Hollstein Jack, Malcovich John		0001	Grade 3	45	...
Class 1 Doe John, Hollstein Jack, Malcovich John		01	Grade 3	5	...
Class 3		01	Grade 5	35	...
Class 4 Puzis Yuri, Matarese Anthony, Kreshchenko Ievgen, Week Jason, Weeks Jonatha...		123	Grade 6	21	...
Physics		2		0	...
Class 5		666	Grade 5	1	...

## Members

Members are users with access to the organization account.

You can view the list of members by opening the **Manage** → **Members** screen.

Member	Locations	Classes	Grade	Last Login	Status	Actions
Anderson, Annie Student - student7@cpt.edu	Baldwin High School	7	Grade 5	May 27, 2024	Active	...
Benager, Winston District Admin - winston.benager@boston.edu	Lexile Test	0	-	Oct 26, 2023	Active	...
Borodin, Yevgen District Admin - captivoice@gmail.com	Lexile Test	2	-	May 7, 2020	Active	...
Bridge, Wesley District Admin - wesley.bridge@boston.edu	Lexile Test	2	-	Mar 30, 2022	Active	...
Brook, Lina Student - lina.student1@boston.edu	Baldwin High School	6	Grade 5	Jun 6, 2024	Active	...
Brown, Lina Student - lina.student@boston.edu	Baldwin High School	4	Ungraded	May 9, 2024	Active	...
Bruce, Kelly Teacher - KBruce@ets.org	Baldwin High School	1	-	Apr 9, 2024	Active	...
Clinton, Donald Student - test1@ets-captivoice.com	Brookside Elemen...	4	Ungraded	Oct 22, 2019	Active	...

If you want to find a specific member, use the search field above the list of members. If you don't know which Location the member belongs to, change the dropdown at the top of the screen from a specific Location to **"All Members"**, and repeat search.

Each member has a *role* that determines their access level. The following tables list role differences.

Role in K-12 Organization	Teacher	School Admin	District Admin
Reports			
View reports for my classes	✓	✓	✓
View reports for my locations		✓	✓

View reports by grade level		✓	✓
View reports by demographic category		✓	✓
View reports for any location			✓
View district level report			✓
Assessments			
Create a new assessment, proctor an assessment	✓ *	✓	✓
See all assessments in my locations/schools		✓	✓
See all assessments in all locations/schools			✓
Rostering			
See students in my classes	✓	✓	✓
See all students in my locations/schools		✓	✓
Add or remove members, edit member details		✓	✓
Add or remove classes, enroll students in classes		✓	✓
See all students in the district/organization account			✓
Add, remove locations, enroll members in locations			✓
Add or remove District Admin or Super Admin			✓
Change organization-wide settings			✓
Configure LMS and SIS integration			✓

\* Can be restricted by District Admin / Super Admin

A Member's role is initially set when a member is added to the organization account (see [Clever](#), [ClassLink](#) for role mapping). To manually change member role:

1. Go to **Manage** → **Members**. A list of all members of your organization will appear.
2. Click the **...** button next to the name of the member you wish to edit and select **Member Details....**
3. Change the role and click **Save**.

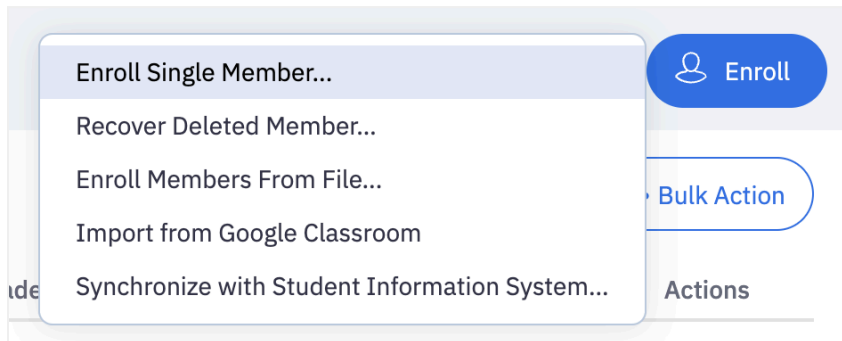
Notes:


- You cannot change your own role.
- When you modify a member's role, the member receives a notification email about the change.
- If you have an SFTP, ClassLink, or Clever account and need to change a member's role contact us at [support@capti.com](mailto:support@capti.com).

# MANUALLY MANAGED ROSTER

## Add a single new member

1. Go to **Manage** → **Members** screen
2. Click **Enroll** → **Enroll Single Member**.



3. A new dialog will appear. Type the new member's email or Capti ID and click **Search**.  
 **Tip:** Capti ID doesn't have to be a real email, but needs to have an email-like @domain format.

A screenshot of a dialog box titled 'Enroll Member' with a close button (X) in the top right corner. The dialog has a light blue background. It contains a text input field with the placeholder text 'Capti ID' and a hint below it: 'Email or Capti ID in email format, e.g. name@school.edu'. Below the input field is a green button with the text 'Search'.

4. If this account is new, you can choose between asking the member to confirm the email account, or activating the account yourself. In the latter case you don't have to use an active email address.
5. Specify member's name, role, location and class (if any).
6. If you want to add more members check the "Enroll another" checkbox.
7. Click **Enroll**.

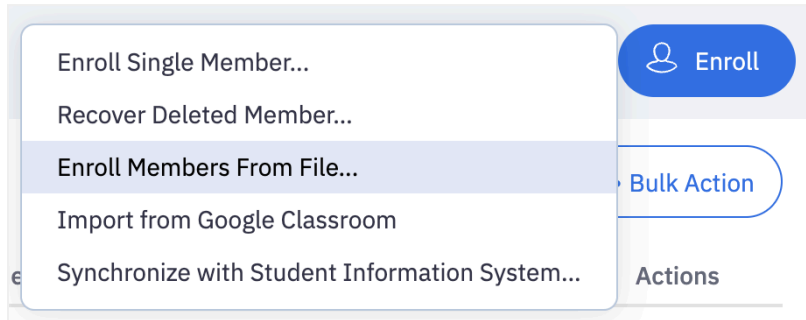


---

## Add members from a file

You can add members to your organization account by uploading a file.

1. Go to **Manage** → **Members** screen
2. Click **Enroll** → **Enroll Members from File...** in the top-right corner of the screen.



3. A new dialog will appear. Configure members you are importing

A screenshot of the 'Enroll Members From File' dialog box. The dialog has a title bar with a close button (X). It is divided into three steps: Step 1: Configure members, Step 2: Download template, and Step 3: Upload completed template. Step 1 contains five dropdown menus: 'Role' (Student), 'Location' (Baldwin High School), 'Class' (No class), 'Account' (Activate the accounts automatically (no email sent)), and 'Unique ID' (Do not specify Unique ID). Step 2 has a 'Download Template' button and a note: 'Download the members.csv template and fill in member names and email addresses.' Step 3 has a 'Choose File' button (labeled 'No file chosen') and a note: 'Upload the modified members.csv file and click "Next" to preview upload summary.' At the bottom of the dialog is a green 'Next' button.

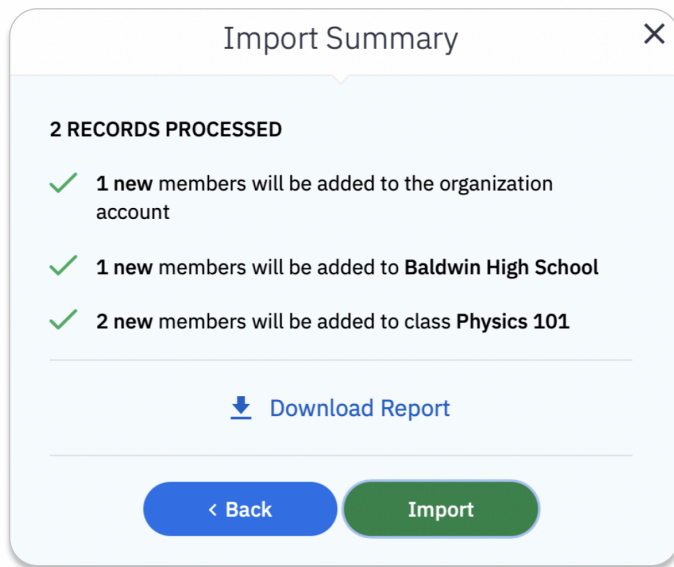
1. Choose a default role for the new members.
2. Choose which location the members will be imported into
3. Choose a default class (if any) for the new members.
4. Choose how to activate new members' accounts. You can either ask the new users to confirm through their emails and choose their own passwords, or you can activate

the accounts right away. The former option will require you to specify each new member with a password, but you won't need to use active email addresses.

5. Choose a Unique ID value for the new members. This will be important if you are planning to later sync the roster automatically, from your SIS via Clever, SFTP or ClassLink.
6. Click **Download Template** to download members.csv file and fill it in with rostering data, or use the file you prepared in advance. Below is the list of the columns:

Column Field Header	Required	Description
<b>Capti ID</b>	Yes	User name that can be used to login. Must use email format, e.g. name@school.edu
<b>First Name</b>	Yes	User's first name
<b>Last Name</b>	Yes	User's surname
<b>Unique ID</b>	Recommended	Unique ID for the user. This value is used to sync roster with Clever, ClassLink and SFTP at a later time.
<b>Password</b>	No	Passwords must be at least 6 characters long, cannot match Capti ID, first name, or last name
<b>Grade</b>	Yes for Student	Student's grade level, accepts values 1...12 or "Other"
<b>State ID</b>	Yes in Minnesota, for Student	Student's state identifier (SSID)
<b>SIS ID</b>	No	Student's SIS identifier
<b>Birthdate</b>	Yes in Minnesota, for Student	Student's date of birth, in format MM/DD/YYYY
<b>Gender</b>	Yes in Minnesota, for Student	Student's gender, e.g. "male", "female", "x"

7. Click **Choose file** or **Browse** and select the file you created.
8. Click **Next** and Capti will upload and analyze your roster.
4. A new dialog summarizing the import and errors (if any) will appear.



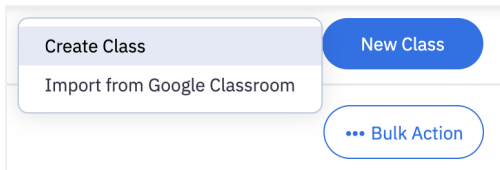
If no errors were found click **Import** and the new members will appear in the members list. Otherwise:

1. Click **Download Report** to review the full error report.
2. Click **Back** in the dialog box to return to the previous screen
3. Fix any reported errors and try uploading the updated template again.

---

## Add a new class

1. From the top bar open **Manage** → **Classes** screen. A list of classes will appear.
2. Click **New Class** → **Create Class**, complete the form and click **Create**.



3. A dialog box will appear where you can specify class name, grade, and other details. Fill in the form and click **Create**.

A screenshot of a 'Create Class' dialog box. The dialog box has a title bar with the text 'Create Class' and a close button (X). The form inside the dialog box has the following fields: 'Name\*' (text input), 'Code\*' (text input), 'Subject' (text input), 'Grade' (text input with a dropdown arrow, currently showing 'Ungraded'), 'Period' (text input), 'Location' (text input with a dropdown arrow, currently showing 'Baldwin High School'), and a 'Create' button at the bottom.

---

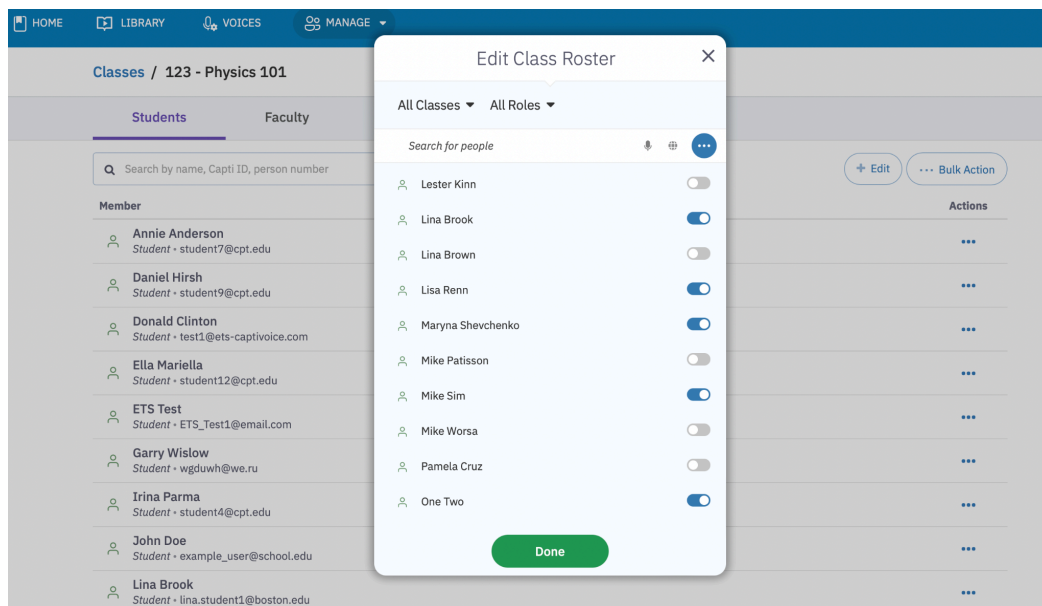
## Add a new location


1. From the top bar open **Manage** → **Locations** screen. A list of locations will appear.
2. Click **New Location**, complete the form and click **Create**.

## Add students to class from a list

If the students you want to add to a class are already registered members of the organization, you can follow those steps to add them to a class:

1. From the top bar open **Manage** → **Classes** screen. A list of classes will appear.
2. Click on the name of the class. A list of current students in the class will appear, if any. You can switch to a list of instructors by clicking the Faculty tab.
3. Click the **Edit** button to choose who you want to add to the class.



4. Click the toggle next to the names of the users you want to add or remove. You can also change access for multiple users at once by clicking  and selecting "All all members" or "Remove all members".
5. When finished click **Done**. The added members will be listed in the class.

---

## Add students to class from a file

In some cases it might be easier to add students to a class from a file, for example if you already have the file ready and don't want to look those students up in Capti one at a time. You can do that by simply uploading the file to Capti, using the following steps:

1. Make sure that the class you want to add students to already exists. If needed, first [create a new class](#).
2. [Import the file](#). Make sure to select the "Student" role, and correct Location and class names from the dropdowns when importing the list.

Enroll Members From File

Step 1: Configure members

Role: Student

Location: Baldwin High School

Class: No class

Account: Ask to confirm email and choose password

Unique ID: Do not specify Unique ID

Step 2: Download template

[Download Template](#)

Download the members.csv template and fill in member names and email addresses.

Step 3: Upload completed template

[Choose File](#) no file selected

Upload the modified members.csv file and click "Next" to preview upload summary.

[Next](#)

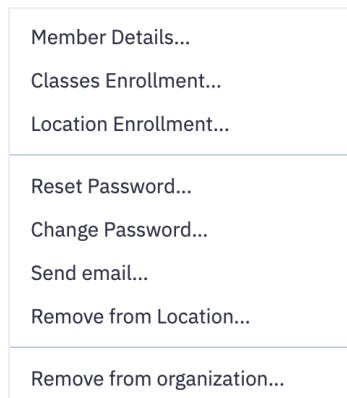
Note that you can use this approach to add to class both students already in the organization account, and those that are not. Capti will simply add the students to the organization account as needed, when processing the file.

---

## Managing member accounts

When a new member is added to the organization, a new member account is created and an email is sent to the new member with the necessary information. Unless the member email address was used with Capti before, or the password was provided at the time the new member account was created, the user will have to confirm his/her email address and choose a new password. Until confirmation is made the member will be listed as “Unconfirmed”.

To manage member accounts go to **Manage → Members**. When you found the member you were looking for click on the number in the “Classes” column to view which classes they are enrolled, or click in **•••** next to the member's name to open menu with options:



- **Member details:** review or change member's name, role, and unique identifiers.
- **Member demographics:** review or change member's demographic information.
- **Classes enrollment:** review or change classes that a member is assigned to.
- **Location enrollment:** review or change Locations that a member is assigned to.
- **Reset password:** reset the member's password and email instructions for a new password.
- **Change password:** change the member's password manually.
- **Activate:** activate the member's account without email confirmation.
- **Re-Invite:** resend the member an email with invitation to confirm account.
- **Send email:** send the member an email.
- **Remove from Location:** remove a member from current location. The member will remain a member of other locations, and therefore a member of the organization account.
- **Remove from Organization:** remove a member from all locations in this organization account, and from the account itself.

---

## Removing members

### *Remove organization member*

To remove one member from the organization, click on the **...** next to the member's name, and select **Remove from organization....** To remove multiple members from the organization click **Bulk Action** → **Remove from organization....**

### *Remove member from a single Location*

You can remove students and faculty members from individual locations without removing them from the organization account itself, as long as they are enrolled into at least one location. To remove a single member click on the **...** button next to the member's name, and select **Remove from location....** To remove multiple members click **Bulk Action** → **Remove from location....**

### *Remove member from a class*

To remove members from a class, go to **Manage** → **Classes** and click on the class name. Then click the **...** button next to the member name and select **Remove**. You can also remove multiple members at once by clicking **Bulk Action** → **Remove**.



# SIS INTEGRATION

## Sync from ClassLink or SFTP (OneRoster)

You can sync your roster using ClassLink's OneRoster export, or by exporting OneRoster directly from your Student Information System (SIS) to Capti SFTP account. Users with a District Admin or a Super Admin role can schedule, or initiate the sync, and review errors if any. Capti support service is always available to assist with setting up and maintaining sync connection.

### Configure Sync

1. **Add Capti to ClassLink** (skip if using pure SFTP sync)

Find the Capti app in the ClassLink library and enable it. This will enable activation of your account in Capti.

2. **Obtain SFTP Credentials**

Reach out to Capti Support to activate ClassLink or SFTP integration and receive your SFTP credentials (SFTP credentials are used for both ClassLink and SFTP sync).

3. **Configure SFTP**

Set up ClassLink or your SIS (if using pure SFTP sync) to share roster data via SFTP using the OneRoster format (see file format below).

4. **Run a Test Import**

Upload your files to the Capti SFTP server, log in to Capti, and go to **Manage** → **Organization** → **SIS Integration**. Click **Import Now** to manually initiate the sync. Error/success report will appear on the screen 5-30 seconds later. Full error logs will be backed up in the 'log' folder on the SFTP server (deleted after 1 year). If the import is unsuccessful, contact Capti Support for assistance.

### File Format

File: [orgs.csv](#)

Column Field Header	Required	Description
sourcedId	Yes	Unique ID of <a href="#">Location</a>
name	Yes	Name of the <a href="#">Location</a> .
type	Yes	Use "school" to identify a <a href="#">Location</a> . Rows with other values in this column will be ignored..
identifier	No	State-preferred school identifier

File: users.csv

Column Field Header	Required	Description
<b>sourcedId</b>	Yes	Unique ID for the <a href="#">user</a> . SourcedId is used in other files and must be unique across all users.
<b>enabledUser</b>	Yes	Boolean: { "true"   "false" }. 'false' denotes that the <a href="#">user</a> is an active record but system access is curtailed according to the local administration rules.
<b>orgSourcedIds</b>	Yes	SourcedIds of the <a href="#">Locations</a> to which this <a href="#">user</a> belongs. To add a user to multiple locations write them in a comma- separated list (see <a href="#">orgs.csv</a> file).
<b>role</b>	Yes	Role of this <a href="#">user</a> in the organization account. See section " <a href="#">Mapping OneRoster roles to Capti roles</a> ".
<b>username</b>	Yes	Active Directory or Google username
<b>givenName</b>	Yes	User's first name
<b>familyName</b>	Yes	User's surname
<b>identifier</b>	Recommended	Student's personal number
<b>email</b>	Recommended	User's email address
<b>password</b>	No	
<b>grades</b>	Yes	<a href="#">Student's</a> grade level. See <a href="#">Common Education Data Standards</a> for a list of accepted grade levels.
<b>userIds</b>	No	External machine-readable IDs. The Type and ID values are enclosed in '{ }' with a colon used to separate the values. Supported types: <ul style="list-style-type: none"> <li>Student State ID (SSID). Example: "{SSID:Id}"</li> </ul>

### Mapping OneRoster roles to Capti roles

Role	Capti role in K-12 account	Capti role in Higher Ed. account
<b>student</b>	Student	Student
<b>teacher, proctor</b>	Teacher	Faculty
<b>administrator</b>	If user's orgSourcedIds maps to a location of type "school" then the role is "School Admin". If user's orgSourcedIds maps to location of type "district" then the role is "District Admin"	If user's orgSourcedIds maps to a location of type "school" then the role is "Location Admin". If user's orgSourcedIds maps to location of type "district" then the role is "Super Admin"

File: [enrollments.csv](#)

Column Field Header	Required	Description
<b>classSourcedId</b>	Yes	SourcedId of a <a href="#">class</a> (see <a href="#">classes.csv</a> file)
<b>schoolSourcedId</b>	Yes	SourcedId of a <a href="#">Location</a> (see <a href="#">orgs.csv</a> file)
<b>userSourcedId</b>	Yes	SourcedId of the <a href="#">user</a> (see <a href="#">users.csv</a> file)

File: [classes.csv](#)

Column Field Header	Required	Description
<b>sourcedId</b>	Yes	Unique ID for the <a href="#">class</a> . SourcedId is used in other files and must be unique across all classes.
<b>title</b>	Yes	Name of this <a href="#">class</a>
<b>classCode</b>	No	Human readable code used to help identify this <a href="#">class</a> .
<b>schoolSourcedId</b>	Yes	SourcedId of the Location that teaches this <a href="#">class</a> (see <a href="#">orgs.csv</a> file).

File: [demographics.csv](#) (optional file)

Column Field Header	Required	Description
<b>sourcedId</b>	Yes	SourcedId of the <a href="#">user</a> (see <a href="#">users.csv</a> file).
<b>birthDate</b>	No	The date of birth, in format YYYY-MM-DD
<b>sex</b>	No	'male' or 'female'
<b>americanIndianOrAlaskaNative</b>	No	Boolean: { "true"   "false" }
<b>asian</b>	No	Boolean: { "true"   "false" }
<b>blackOrAfricanAmerican</b>	No	Boolean: { "true"   "false" }
<b>nativeHawaiianOrOtherPacificIslander</b>	No	Boolean: { "true"   "false" }
<b>white</b>	No	Boolean: { "true"   "false" }
<b>demographicRaceTwoOrMoreRaces</b>	No	Boolean: { "true"   "false" }
<b>hispanicOrLatinoEthnicity</b>	No	Boolean: { "true"   "false" }

## FAQ

### How do I run an import test?

Go to **Manage** → **Organization** → **SIS Integration**, and click **Import Now** to manually start the sync. A report showing errors or success will appear shortly. If you need assistance interpreting the report or resolving any issues, please contact support.

### How often does the sync run?

The sync occurs daily at 2AM EST. You can also request to put the sync on pause.

### Is there a page to check the sync status?

Yes. Administrators can view the current sync status by going to **Manage** → **Organization** → **SIS Integration**.

### What happens if a user moves between classes or schools?

The change will be automatically reflected in Capti.

### What if a user record is deleted from the SIS?

The user will be removed from the Capti organization account and archived. If re-added to the SIS, the user will be restored to the account.

### Can the user roster be manually modified in a district using SFTP or ClassLink integration?

For manual changes to the roster in districts using ClassLink or SFTP, please contact support.

### What single sign-on options are available?

Users can log in to Capti using ClassLink single sign-on.

---

# Sync using Clever™

## Overview

You can use [Clever](#) to sync the roster with your Student Information System (SIS).

The first step in setting up Clever sync is to enable the Capti connection in your Clever dashboard, contact Capti support at support@capti.com. We will take it from there, in close cooperation with your technology specialists.

## FAQ: Single Sign-On with Clever

### *How are Clever roles mapped to Capti roles?*

Role	Capti role in K-12 account	Capti role in Higher Ed. account
Student	<a href="#">Student</a>	<a href="#">Student</a>
Teacher	<a href="#">Teacher</a>	<a href="#">Faculty</a>
Staff	If the user is assigned to 0 locations then <a href="#">District Admin</a> , else <a href="#">School Admin</a> .	If the user is assigned to 0 locations then <a href="#">Super Admin</a> , else <a href="#">Location Admin</a> .
District Admin	<a href="#">District Admin</a>	<a href="#">Super Admin</a>

### *Which single sign-on options are available?*

- The "Log In With Clever" button on Capti website.
- "Capti" icon in your Clever app portal.
- Clever redirect link (can be used anywhere in LMS).

### *Which field does Capti use as the key identifier from Clever?*

Capti uses Clever ID as the key identifier. Other fields will be ignored.

### *Does Capti support Instant Login?*

Yes. Instant login is the only login option for users with Clever accounts.

### *Which browsers are supported?*

Instant login is supported on Chrome, Safari, and Firefox, Edge, same as Capti itself. Instant login is not yet supported on iOS.

### *Which platforms are supported?*

Instant login is available for Capti Online users on Chromebooks, Windows, and Mac. If you are using a standalone (installable) version of Capti on iOS, Windows, and Mac you can login using your Capti ID and password. To find your Capti ID and set your password:

1. Use Instant Login to open Capti Online
2. Go to **Account** → **Personal**

### **FAQ: Secure Sync with Clever**

#### *How do I enable Secure Sync with Clever?*

1. Enable Capti in your Clever account
2. Get in touch with us at support@capti.com

And that's it! We will create a new Capti organization account and kick off the initial sync

#### *How often will the Secure Sync occur?*

Every day at 2AM EST. You can also trigger the sync manually by going to **Manage** → **Organization** → **SIS Integration** and clicking **"Import Now"**.

#### *Is there a status page reflecting the sync status?*

Yes. Users with the Administrator role can go to **Manage** → **Organization** → **SIS Integration** to see the current sync status with Clever.

#### *What is being Synced?*

- *Clever District* will become a new Capti organization account.
- *Clever Schools* will become [Capti Locations](#) within the organization account, and users will be assigned to their respective Locations. Users are allowed to be in multiple locations.
- *Clever Sections* will become [Capti Classes](#) within a Location, and users will be assigned to their respective classes. Users are allowed to be in multiple classes.
- Clever users will become new [Capti Members](#).

#### *If a teacher is also an administrator, how will Capti handle it?*

The user will have multiple accounts, one for each user type.

#### *What happens if a user moves between classes or schools?*

The change will be reflected in Capti.

### *What do you do if a user record is deleted from Clever?*

The user will be removed from the Capti organization account and archived. If a user is added back in Clever, he/she will be restored to the organization account.

### *Can user roster be altered in a Clever-enabled district?*

If you need to add or remove users manually in a district that's configured to use Clever integration, please contact us at support@capti.com.

---

## Troubleshooting

### *I am supposed to get an email from Capti but I do not see it*

You have the following options:

- Make sure the email is not in your junk or spam folder
- Make sure that the email address you provided is correct

If none of the above helps then either our email is rejected by your email server (can happen with non-personal emails) or the Capti account doesn't exist.

### *An organization account member cannot find their confirmation email*

You have the following options:

- Make sure the email is not in your junk or spam folder
- Make sure that the email address you provided is correct
- Try resending the account confirmation email. Go to **Manage** → **Members**, click the **...** button next to the member's name to open the menu, then click **Re-Invite**.
- Avoid the need for sending confirmation email. Go to **Manage** → **Members**, click the **...** button next to the member's name to open the menu, then click **Activate...** and fill in the password. Inform the member of their password. They will be able to log in without a confirmation email using the password you provided.

### *I am unable to log in to Capti*

If you have a Capti account, press **Restore Password** or **I forgot my password** in the "Log In" screen, and follow the instructions.

### *Capti stops working when switching users in Windows*

You have the following options:

- Log out of the first Windows account before logging in with the second Windows account.

- First close Capti as the first Windows user, then switch the user in Windows, then reopen Capti as the second Windows user.

### *I am unable to add students or teachers to my organization account*

You can add new members if

- Your Capti organization account has sufficient remaining member capacity.
- Your Capti account has a *Teacher* or an *Administrator* role.

Contact your Capti organization account administrator or us at support@capti.com (if you are the administrator) to make appropriate adjustments.

### *Capti shortcuts don't work with JAWS screen reader*

You can use Capti shortcuts with JAWS. If you are using JAWS 16.0.2136 or higher, you first need to turn on "Allow Web Application Reserved Keystrokes" in the JAWS Settings Center or Quick Settings. Do the following in JAWS:

1. Click **Insert + F2**
2. Select "Run Settings Center"
3. Search for "web app."
4. Check the box next to **Allow Web Applications Reserved Keystrokes**. Make sure that you edit the default file.

If you are using an old version of JAWS or do not wish to turn on this setting you can also activate any Capti shortcut by preceding it with **Insert + 3** which causes the next keystroke to be passed directly to Capti. For example, to start listening to track you would click **Insert + 3** followed by **Q**.



# LMS INTEGRATION

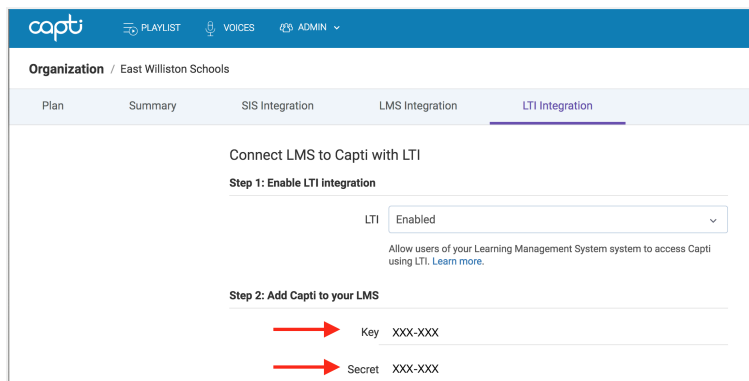
## Schoology

### *Setting up Capti as Schoology LTI Provider*

When you set up Capti as a Schoology LTI provider, teachers and students will be able to access Capti directly from Schoology without the need to login. Teachers will be able to share Capti assignments into their Schoology courses and groups.

#### Step 1: Enable LTI in Capti

1. Login to Capti on the website. Your Capti account must have an Administrator role.
2. Go to **Manage** → **Organization** → **LTI Integration**
3. Set "LTI Integration" to "Enabled". Take note of the consumer key and shared secret, you will need them later.



4. Either contact us to enable automatic LTI rostering for your account or add Schoology users to your Capti account manually.

For seamless integration, a user's Capti ID must match their primary Schoology email address.

#### Step 2: Add Capti Voice app to Schoology

1. Login to Schoology. Your Schoology account must have an Administrator role.
2. Open the Schoology **App Center** and look for the Capti Voice app. Capti's type is "LTI App" and Capti fits into the categories of Language Arts, Social Science, and Special Education.
3. Click on Capti Voice, then proceed to install it: click **Install LTI App**, then click **I Agree** to confirm.
4. Screen "Organization Apps" will appear. Click **Configure** next to Capti Voice name.

5. Set consumer key and shared secret to the values from Capti's "LTI Integration" tab (see above).
6. Click **Save** settings.
7. Go back to the previous screen, and click **Install/Remove**. Make sure to check all the courses that Capti should be available for and click **Submit**.

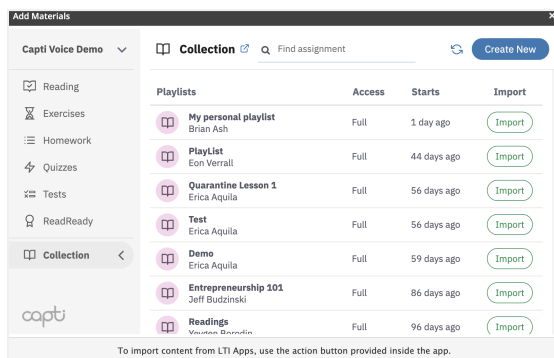
### Step 3: Verify integration

To verify access to Capti from Schoology:

1. In Schoology: open a course and check that "Capti Voice" appears in the main tools sidebar.
2. Click on "Capti Voice". Capti Voice screen will appear on the right and notify you if you logged in successfully.

To verify ability to import Capti assignments into Schoology:

1. In Schoology: open a course, click on **Add Materials**, and select **Capti Voice**
2. A new dialog box will appear with your Capti assignments. Pick any assignment and click **Import** or click **Create New** to create a new assignment.



3. Observe that a new entry should appear in your course materials, named after the assignment you imported. Click it to access it. Your students will be able to do the same.

### ***Role Mapping from Schoology to Capti***

Role	Capti role in K-12 account	Capti role in Higher Ed. account
<b>Learner</b>	Student	Student
<b>Instructor</b>	Teacher	Faculty
<b>Administrator</b>	School Admin	Location Admin

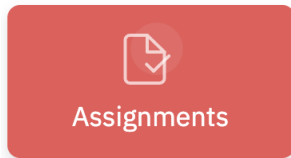
---

# Google Classroom

## *Setting up import of assignments from Capti into Google Classroom*

No special setup is required to import your Capti assignments into Google Classroom. To verify ability to import assignments:

1. In Capti: go to **Home** → **Assignments** and click on the name of any assignment.



2. Click button **Share Link** on the right hand side

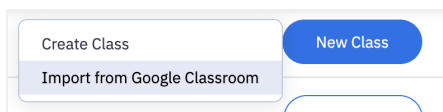


3. Select **Share to Google Classroom**
4. A new dialog box will appear where you can select the class with which you want to share the assignment.

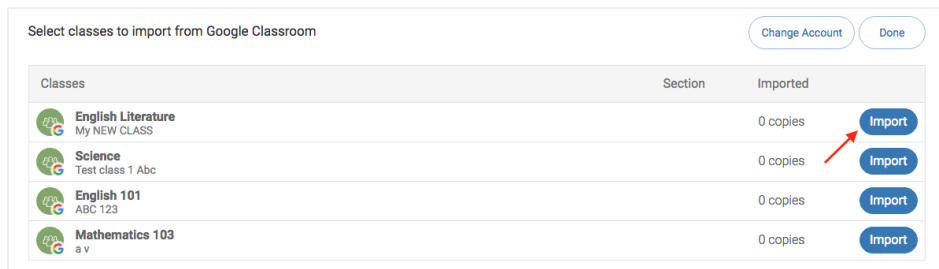
## *Synchronizing with Google Classroom*

Unlike other supported Learning Management Systems, Google Classroom does not have support for LTI integration. Therefore, Capti implements a synchronization option that can be triggered manually for individual classes. To import one or more classes from Google Classroom:

1. Go to **Manage** → **Classes** to open the list of classes.
2. Click **New Class** → **Import from Google Classroom**. You may need to log into your Google Classroom account.



3. A list of your Google Classroom classes will appear. Find the classes you want to import and click **Import** next to each.



4. A dialog box will appear. Make sure that the details of the class you are importing are correct and click the **Import** button again.

Once the class is imported you will be able to add and remove students and faculty. The changes you make will not be synced back to Google Classroom. To re-import a class from Google Classroom click the **...** button next to the class name, then choose **Synchronize with Google Classroom**. New class members may be added and existing members removed from the class (but not from the organization account).

Other useful features when working with Google Classroom:

- To open a class directly in your Google Classroom account click the **...** button next to the class name and select **Show in Google Classroom**. Your Google Classroom will open in a new browser tab.
- To disassociate a class from your Google Classroom account click the **...** button next to the class name and select **Unlink from Google Classroom**. This operation is not reversible.
- To switch to a different Google Classroom account or unsubscribe from Google Classroom click **Change Google Classroom Account** under the list of classes.

---

## Troubleshooting

### ***Single Sign-On with LTI***

*Where do teachers and students go in the LMS to open Capti in Schoology?*

- Click "Capti Voice" in the course sidebar
- Click on the name of any Capti Voice assignment in course materials

*Which field does Capti use as the user's key identifier?*

Capti uses the user's primary email in the LMS.

*Is there a status page to check if a single sign-on is enabled?*

Yes. Users with the Administrator role can go to **Manage** → **Organization** → **LTI Integration** and enable or disable the single sign-on feature.

## **Automatic Account Provisioning**

### *Can LMS integration be enabled without account provisioning?*

Yes, and this is in fact the recommended approach. We can enable LTI integration without account provisioning, and work with you on configuring your roster either [manually](#) or via [SIS sync](#).

### *How do I enable LTI integration to automatically provision new accounts?*

Get in touch with us at [support@capti.com](mailto:support@capti.com) and we will enable this feature in Capti

### *When will new accounts be provisioned?*

When the user tries to login to Capti from the LMS for the first time.

### *Can new accounts be provisioned in bulk?*

No, each account will be provisioned on demand. If you need an entire class to get accounts, ask your students to open Capti at least once from the LMS. After your students access Capti for the first time their account will appear in Capti.

### *Is there a status page to check if automatic rostering with my LMS is enabled?*

Yes. Users with Administrator role can go to

- **Manage** → **Organization** → **SIS Integration** to check that "Integration Method" is set to "LTI Tool Consumer"
- **Manage** → **Organization** → **LTI Integration** to check which Location the new students will be added to when new accounts are created

Please contact us if you need to change this setting.

### *What happens if a user moves between classes?*

Next time the user logs in the user will be added to the new class but not removed from the previous one.

### *What happens if the same LMS instance is used in multiple schools?*

They will be treated as a single school in Capti.

### *What do you do if a user record is deleted from your LMS?*

The user will be retained in Capti until removed by a user with Administrator role.

### *Can the user roster be altered in a LTI-enabled account?*

Yes, users can be added and removed manually.

## **Error Messages**

The following error messages may appear when students or faculty members are trying to open Capti or access a Capti assignment from the Learning Management System. The error message explanations address either a teacher or a student, depending on who the error message itself is addressing.

### *Single sign-on is not available: shared key/secret not found.*

Capti LTI App in your Learning Management System must be configured to use the correct consumer key and shared secret. You can find your key and secret by logging into Capti ([www.captivoice.com](http://www.captivoice.com)) with your Capti Administrator account and going to **Manage** → **Organization** → **LTI Integration**. If you don't have an administrator account, report this problem to someone with this level of access.

### *Single sign-on is not available: shared key/secret and your primary LMS email address do not map to the same education account.*

Capti LTI App in your Learning Management System is not linked to the same Capti education account as your Learning Management System email. If your email is in the wrong Capti education account then move it to the same Capti education account that's linked to your LTI App. Or you may also configure Capti LTI App to use the correct key and secret.

### *Single sign-on is not available: your LMS account has no primary email.*

In order to sign into Capti you must have a primary email in your Learning Management System. Please make sure it is specified and try again.

### *Single sign-on is not available: your account was previously removed.*

Your account was removed from Capti education account. Ask to be re enrolled in Capti and try again.

### *Cannot create a new account due to licensing restrictions.*

The quota for licenses in Capti was exceeded. Please contact your administrator or sign in with a different email.

### *Cannot create a new account: automatic account provisioning is disabled for this Capti education account.*

Your Learning Management System email is not in the Capti education account and it cannot be added automatically. Please sign in with a different email.

### *Cannot create a new account or sign on: user role not detected.*

Capti must know your role in the Learning Management System system, but your role could not be detected. Possible cause: misconfigured LTI variables.

*Cannot create a new account or sign on: user role not compatible with Capti.*

Capti must know your role in the Learning Management System, but your role is not compatible with Capti. Please sign in with a different email or add this account to Capti manually before signing in from your Learning Management System.

*Single sign-on was disabled by the Capti account administrator.*

You can enable single sign-on by logging into Capti ([www.captivoice.com](http://www.captivoice.com)) with your Capti Administrator account and going to **Manage** → **Organization** → **LTI Integration**. If you don't have an administrator account, report this problem to someone with this level of access.

*This feature is disabled.*

The feature you are trying to use has been disabled in the Capti education account.

*You need an Assistant, Teacher or Administrator role in Capti to access this feature.*

The feature you are trying to use is restricted and cannot be accessed by a user with a Student role.

*You do not have access to the assignments in [Name of School or Location].*

The assignment you are trying to access is not in your school/location.

*This assignment no longer exists in Capti.*

The assignment you are trying to access was deleted.

*You do not have permission to access this assignment.*

You are not listed in the assignments you are trying to access. You can only be added to this assignment manually.

*This assignment is currently On Hold*

You have been placed on hold in the assignment you are trying to access. Ask your teacher to post it for you and then try opening it here again.

*This assignment is currently In Progress*

The assignment you are trying to access is open on a different computer or was previously incorrectly closed. Ask your teacher to post it for you and then open it here again.

*Please reload the page to make sure Capti keeps working correctly.*

An unidentified error has occurred. Reloading the page might help. If the error persists, please contact [support@capti.com](mailto:support@capti.com).

*This assignment is not yet open. It will open on [Date and Time].*

The assignment has been scheduled to start on the specified date and time. The assignment will become accessible after it starts.



### *Invalid LTI request*

This error message can be caused by one of the following:

- Browser extension is blocking your Learning Management System from correctly connecting to Capti via LTI. Disable any browser extensions that may be at fault and try again.
- LTI App Key/Secret may be missing. Capti LTI App in your Learning Management System must be configured to use the correct consumer key and shared secret.