



**PRIVILEGED  
MEMBER**

# **MEMBERSHIP SUITE USER GUIDE**

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For any questions about this User Guide  
or the Membership Suite, please contact:  
[membership@pli.edu](mailto:membership@pli.edu)

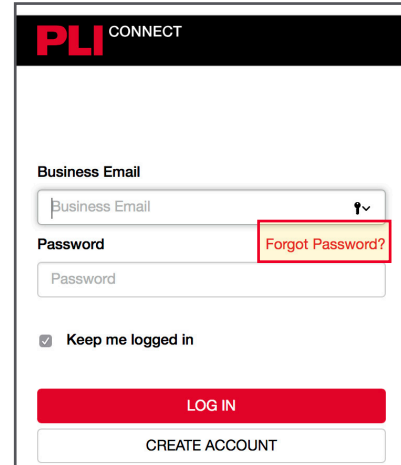
# Introduction & Access

## Introduction

PLI Privileged Members use Membership Suite as a centralized location for account management and administrative tasks.

## Log in to your account for the first time (or reset password):

1. Go to [www.pli.edu](http://www.pli.edu) and click “**Sign In**” in the upper right corner.
2. Click the “**Forgot Password**” link.
3. Enter your business email and a reset link, and temporary password will be sent to you automatically.
4. Check your email for the temporary password and follow the link provided.
5. Log in with your business email and temporary password. Create a new password and click “**Submit**” to log in.



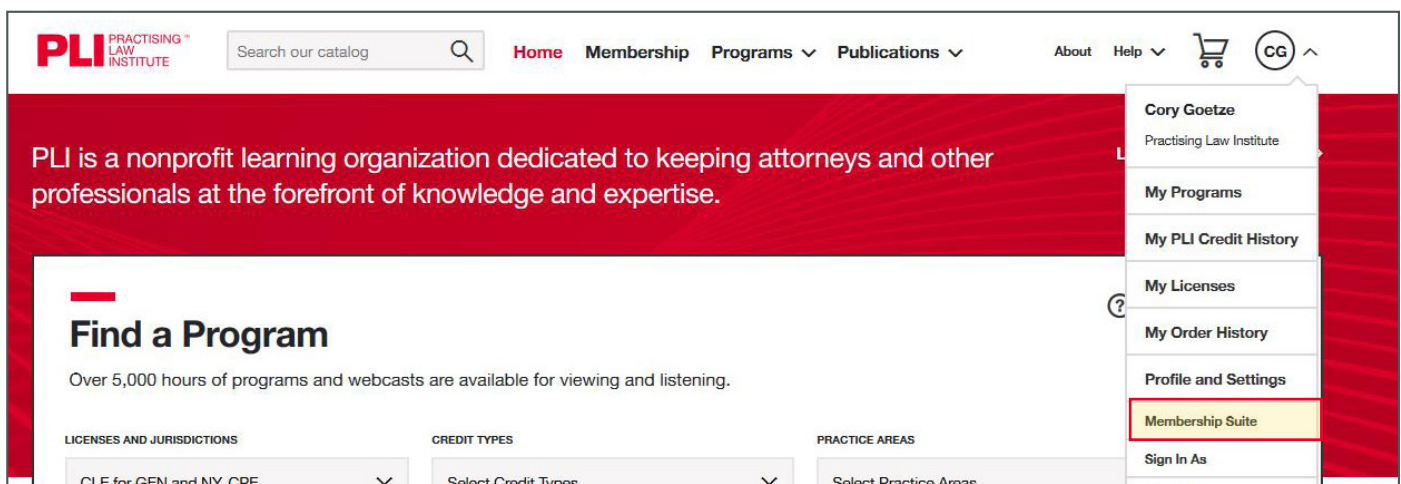
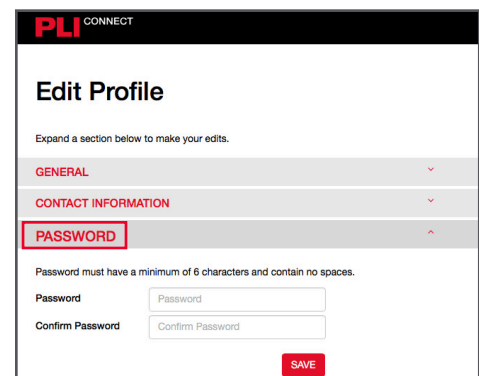
## My Account

### Changing your password

1. Scroll over “**My Account**” and select “**Edit Profile**” from the drop-down menu.
2. Click “**Password**”.
3. Enter your new password with a minimum of six characters and no spaces.
4. Click “**Save**”.

### Access

Scroll over “**My Account**” and select “**Membership Suite**” from the drop-down menu to be taken to the Membership Suite Home Page.




## Membership Suite Home Page

The **Membership Suite Home Page** provides a wide range of administrative tools, program overviews, upcoming events and helpful resources in one centralized portal.

### From here, you can:

1. **Manage** your Privileged Membership using the administrative tool bar
2. **View** your upcoming registrations
3. **View** the status of your Groupcasts
4. **Manage** an editable list of office locations
5. **Use** quick links to PLI support, FAQs and User Guides
6. **Explore** helpful membership resources, schedules and catalogs
7. **View** upcoming 1-Hour Briefings



Welcome Jane My Account ▾ My Cart Logout Contact Us CHAT NOW

EVER CURRENT

in All Content Search

Programs & Webcasts
On-Demand
Interactive Learning Center
Publications
Patent Office Exam
The SEC Institute
PLI PLUS
Pro Bono

Advanced Search

Home
Roster
Registrations
Request Groupcast ▾
My Lists
Administrative Users
Reports

### Registrations for Upcoming Live Programs 2

International Arbitration 2017 New York, NY	Jun. 5, 2017	Live Seminar	Registered: 3
Anti-Money Laundering Due Diligence and Compliance 2017: What Lawyers, Accountants, and other Professional Service Providers Need to Know San Francisco, CA	Jun. 5, 2017	Live Seminar	Registered: 4
International Arbitration 2017 New York, NY	Jun. 5, 2017	Live Webcast	Registered: 6
Anti-Money Laundering Due Diligence and Compliance 2017: What Lawyer, Accountants, and other Professional Service Providers Need to Know San Francisco, CA	Jun. 5, 2017	Live Webcast	Registered: 4
Prison Litigation 2017: Practical Strategies New York, NY	Jun. 6, 2017	Pro Bono	Registered: 1

View All

### Offices 4

Add | Edit

New York, NY, 1177 Avenue	(324)
San Francisco, CA, 685 Market	(13)

### Groupcast Status 3

Growing Trend of Chinese Investments in Financially-Distressed U.S. Businesses and Assets New York, NY, 1177 Avenue, test 3/21/2017 1:00 PM EST Status: Approved	<a href="#">Program Overview</a> <a href="#">Edit</a> <a href="#">Upload Attendance</a> <a href="#">Cancel</a>
Compliance and Criminal Enforcement Options for Noncompliant International Taxpayers New York, NY, 1177 Avenue, test 5/27/2017 10:00 AM EST Status: Approved	<a href="#">Program Overview</a> <a href="#">Edit</a> <a href="#">Upload Attendance</a> <a href="#">Cancel</a>
Public Interest Boot Camp 2017 New York, NY, 1177 Avenue, 100 5/31/2017 12:00 PM EST Status: Approved	<a href="#">Program Overview</a> <a href="#">Edit</a> <a href="#">Upload Attendance</a> <a href="#">Cancel</a>
The Art & Science of Interviewing Pro Bono Clients 2017 New York, NY, 1177 Avenue, NYC 6/2/2017 10:00 AM EST Status: Approved	<a href="#">Program Overview</a> <a href="#">Edit</a> <a href="#">Upload Attendance</a> <a href="#">Cancel</a>

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- [Frequently Asked Questions](#)
- [Live Phone Support](#)
- [Membership Suite User Guide](#)
- [Privileged Membership Access Guide](#)
- [membershipsuite@pli.edu](mailto:membershipsuite@pli.edu)

### Membership Resources 6

- [Calendar of Events](#)
- [CPE Landing Page](#)
- [PLI InBrief](#)
- [Program Catalog](#)
- [Upcoming Programs](#) +
- [Webcast Schedule](#)

### Upcoming 1-Hour Briefings 7

Legal issues and the Driverless Car: Moving Towards Mobility	6/6/2017
ISO 37001 Anti-Bribery Management Systems: Substance, Certification, and Open Questions	6/7/2017
TC Heartland LLC v. Kraft Foods Group Brands LLC: Nationwide Venue in Patent Infringement Actions Is No More	6/8/2017

[View All](#)

# Roster Management

## Roster Management

Administrators can manage and edit their organization's Privileged Membership roster from this area. All changes are reflected immediately, allowing instant access to new individuals.

## Adding to Your Roster

Three options are available under the "Roster" tab:

**Add Member, Add Office** and **Add Department**.

The screenshot shows the PLI Practising Law Institute website interface. At the top, there is a navigation bar with links for 'Home', 'Roster', 'Registrations', 'Request Groupcast', 'My Lists', 'Administrative Users', 'Reports', and 'Membership Suite for Practising Law Institute'. A search bar is located at the top right. A red box highlights the 'Add: Member | Office | Department' button. Below the button is a table with columns for 'Office', 'Department', 'Name', and 'Email'. The table is currently empty, and the 'Find Member' search bar is visible.

## Add Member

The **Add/Edit Member Profile** pop-up screen allows you to add individuals to your roster, select their office location, create/change their password, add state licenses and identify their practice areas.

## Send Welcome Email

Please remember to check the box indicating **"Send Welcome E-mail to Member"** introducing their benefits as a PLI Privileged Member, and providing them with their login credentials and account setup instructions.

The screenshot shows the 'Add / Edit Member Profile' form. It includes fields for 'Company', 'Password', 'State Licenses', and 'Practice Areas'. On the right side, there are fields for 'Title', 'First Name', 'Middle Initial', 'Last Name', 'Business Phone', 'Business Email', 'Fax', 'Personal Phone', and 'Personal Email'. A red box highlights the 'Send Welcome E-mail to Member' checkbox at the bottom left of the form.

## Add Office

Under **Add Office**, you can view your organization's current list of offices and add new locations.

The screenshot shows the 'Add/Edit Office' form. It includes a list of existing offices: 'New York, NY, 1177 Avenue of the Americas (Contract)' and 'San Francisco, CA, 685 Market St'. On the right side, there is a form for adding a new office with fields for 'Name', 'Address', 'City', 'State/Province', 'Zip/Postal Code', 'Country', 'Email', 'Phone', 'Fax', and 'Website'. A red box highlights the 'Save Office' button at the bottom right of the form.

## Add Department

The **"Add Department"** pop-up helps you add new departments or edit existing departments to reflect your organization's internal structure.

The screenshot shows the 'Add/Edit Department' form. It includes a list of existing departments: 'Accounting', 'Accounts Receivable', 'Administration', 'Administration CLE', 'Alumni', 'Board Member', 'CLE', 'Collections', 'Conference', 'Consultant', 'Customer Service', and 'Facilities And Office Services'. On the right side, there is a form for adding a new department with fields for 'Name' and 'Notes'. A red box highlights the 'Save Department' button at the bottom right of the form.

## Manage Roster

The Roster home page shows a full list of your organization's current members.

1. The list can be narrowed down by Enterprise or Department.
2. Use the "Find Member" functionality to find specific individuals.
3. Select actions from the drop-down menu to edit multiple individuals simultaneously.
4. Select all or some roster individuals using the check mark boxes.
5. Browse the entire roster list.

The screenshot shows the PLI Roster Management interface. At the top, there is a navigation bar with the PLI logo, user information (Welcome Jane), and links for My Account, My Cart, Logout, Contact Us, and CHAT NOW. Below this is a search bar with a dropdown menu set to 'All Content' and a Search button. A secondary navigation bar includes links for Programs & Webcasts, On-Demand, Interactive Learning Center, Publications, Patent Office Exam, The SEC Institute, PLI PLUS, and Pro Bono. The main navigation bar features Home, Roster (highlighted), Registrations, Request Groupcast, My Lists, Administrative Users, and Reports. Below the navigation, there are two filter buttons: 'View roster for: Enterprise' (with a 'Select Location ...' dropdown) and 'View roster for: Department' (with a 'Select Department ...' dropdown). A 'Find Member' search bar is also present. The main content area displays a table of members with columns for Select All, Office, Department, Name, and Email. The first row is highlighted, and a red '4' is placed over the 'Select All' checkbox. A red '3' is placed over the 'Actions' dropdown menu, and a red '2' is placed over the 'Find Member' search bar. A red '5' is placed over the pagination controls at the bottom right of the table. The table shows 10 entries out of 337 total.

## Editing Multiple Users

The Roster page can be used to edit multiple individuals at once by selecting the specific members with check marks and choosing an option from the "Actions" drop-down menu:

- Remove users
- Change users' practice areas
- Change users' office locations and departments
- Send PLI Welcome Emails

This screenshot shows the same PLI Roster Management interface as the previous one, but with the 'Actions' dropdown menu open over the first row of the member list. The dropdown menu contains the following options: 'Remove From Roster', 'Change Practice Areas', 'No Longer With Firm', 'Move Location', 'Move Department', and 'Send Welcome Email'. A red '4' is placed over the 'Select All' checkbox of the first row, and a red '5' is placed over the 'Send Welcome Email' option in the dropdown menu. The 'Find Member' search bar is also visible, with a red '2' placed over it. The table shows 2 of 10 entries selected.

# Program Registrations

## Creating and Modifying Registrations

The Registration page can be used to access existing registrations and create new registrations for upcoming programs.

## Registration Queue

1. **Displays** your current registrations for all future programs
2. **Provides** links for viewing each program's overview page
3. **Allows** you to view additional information on current registrations
4. **Enables** additional registrations directly from the roster

Programs & Webcasts		On-Demand	Interactive Learning Center	Publications	Patent Office Exam	The SEC Institute	PLI PLUS	Pro Bono
Home	Roster	<b>Registrations</b>	Request Groupcast	My Lists	Administrative Users	Reports	Membership Suite for Practising Law Institute	
<b>Registration Queue</b>		1		Excel PDF Print		Show Six Month History		
Title	Location	Date	Type	Status	Action			
Prison Litigation 2017: Practical Strategies	New York, NY	Jun. 6, 2017	Pro Bono	Registered: 2	3 View Registrations Register from Roster			
Tax Planning for Domestic & Foreign Partnerships, LLCs, Joint Ventures & Other Strategic Alliances 2017	San Francisco, CA	Jun. 6 - 8, 2017	Live Seminar	Registered: 3	4 View Registrations Register from Roster			

## Registering from Program Pages

Registrations can also be made from any program page. Click the title of the program you are interested in to reach its landing page, where additional information on the Program is provided.

- **“Register From Roster”** will bring you to the list of current registrations for the program.

Overview Credit Details Schedule & Location Program Faculty Watch On-Demand

### Up to 15.5 credits

2-Day Program  
See Credit Details Below

### Overview

Please be advised that only breakout sessions 1a, "Analysis of a Technology License Agreement," and 2a, "Licensing Issues in the Life Sciences Industry," will be available via Live Webcast and Groupcast.

### Why You Should Attend

Intellectual property licensing continues to grow increasingly complex with the legal, regulatory and technical landscape constantly evolving. Building and maintaining a successful and effective practice requires that practitioners stay sharp and current in a wide variety of key areas. Whether you are using licensing to develop technology, expand or create market opportunities, or generate returns from existing assets, managing licensing transactions requires a broad and deep toolkit.

Additionally, whether licensing patents, copyrights, trade secrets or trademarks, the ability to structure, draft and negotiate complex license agreements is critical to a successful transaction.

This comprehensive program will feature updates on current legal developments, present case studies highlighting best practices, discuss tactics for negotiating frequently contested issues, and provide guidance on identifying and avoiding common pitfalls.

### What You Will Learn

- Negotiating strategic alliances and other joint development agreements
- Advanced considerations in copyright, content, and trademark licensing
- Software licensing

### Register

Choose a date and program format.

Live In-Person

- New York, NY Mar 4 - 5, 2019 8:50 AM EST
- Chicago, IL May 9 - 10, 2019 8:50 AM CST

Live Webcast

- Watch Online Mar 4 - 5, 2019 8:50 AM EST

Remote Location

- Atlanta, GA Mar 4 - 5, 2019 8:50 AM EST
- Pittsburgh, PA Mar 4 - 5, 2019 8:50 AM EST
- Philadelphia, PA Mar 4 - 5, 2019 8:50 AM EST
- Mechanicsburg, PA Mar 4 - 5, 2019 8:50 AM EST
- New Brunswick, NJ Mar 4 - 5, 2019 8:50 AM EST

Membership Suite

Register From Roster

RESERVE MY SEAT

Learn how **Privileged Membership** can enable you to attend this program at no cost to you.

Space is Limited. Register today to secure your

# Program Registrations (continued)

## Registering Individuals

Click **“Register From Roster”** and a registration pop-up will appear.

1. Search for members by name, office, department or practice area
2. Select individuals by clicking the red plus sign to the left of their rows
3. Click **“Register”** to add them to the registration list. Attendee will receive a “real-time” email confirmation.

**Tax Planning for Domestic & Foreign Partnerships, LLCs, Joint Ventures & Other Strategic Alliances 2017**  
Live Seminar in San Francisco, CA on Jun. 6 - 8, 2017  
[Location: 685 Market Street, First Floor San Francisco, CA 94105 USA. Time: Jun. 6, 2017 at 9:00 AM]

Registered to date:3  
Export Registration List:  
Excel PDF Print

Selected 0 of 0 [Cancel Registration](#) [Register From Roster](#) Quick Search (Type Name, Office, Department or Email):

Filter By: NAME OFFICE DEPARTMENT PRACTICE AREA Select ...

	Office	Name	Email
+	New York, NY, 1177 Avenue of the Americas		
2 +	New York, NY, 1177 Avenue of the Americas		
+	New York, NY, 1177 Avenue of the Americas		
+	New York, NY, 1177 Avenue of the Americas		

Showing 0 to 0 No entries to show 1 to 10 of 337 (filtered from 337) Show 10 entries previous next

3 Register

## Canceling Program Registrations

Registrations can be canceled at any time by checking the box to the left of an individual and clicking **“Cancel Registration”**. Attendee will receive a “real-time” cancellation email.

**Tax Planning for Domestic & Foreign Partnerships, LLCs, Joint Ventures & Other Strategic Alliances 2017**  
Live Seminar in San Francisco, CA on Jun. 6 - 8, 2017  
[Location: 685 Market Street, First Floor San Francisco, CA 94105 USA. Time: Jun. 6, 2017 at 9:00 AM]

Registered to date:3  
Export Registration List:  
Excel PDF Print

Selected 0 of 3 [Cancel Registration](#) [Register From Roster](#) Quick Search (Type Name, Office, Department or Email):

	Last	Middle	First	Office	Department	Email	Status	Order #
<input type="checkbox"/>							Registered	4398259
<input type="checkbox"/>							Registered	4387220
<input type="checkbox"/>							Registered	4388996

# Scheduling a Groupcast

## Remote Groupcasts – Introduction

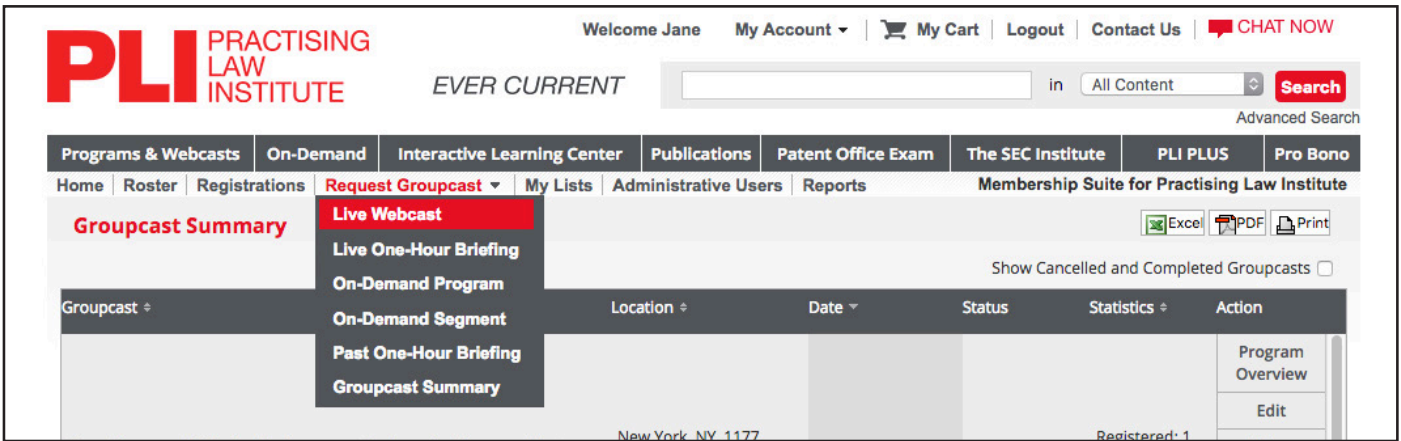
**Remote Groupcasts** are group viewings of PLI Webcasts or On-Demand Web programs from the convenience of your organization’s own location, creating a classroom experience and encouraging participation.

## Groupcast Requirements:

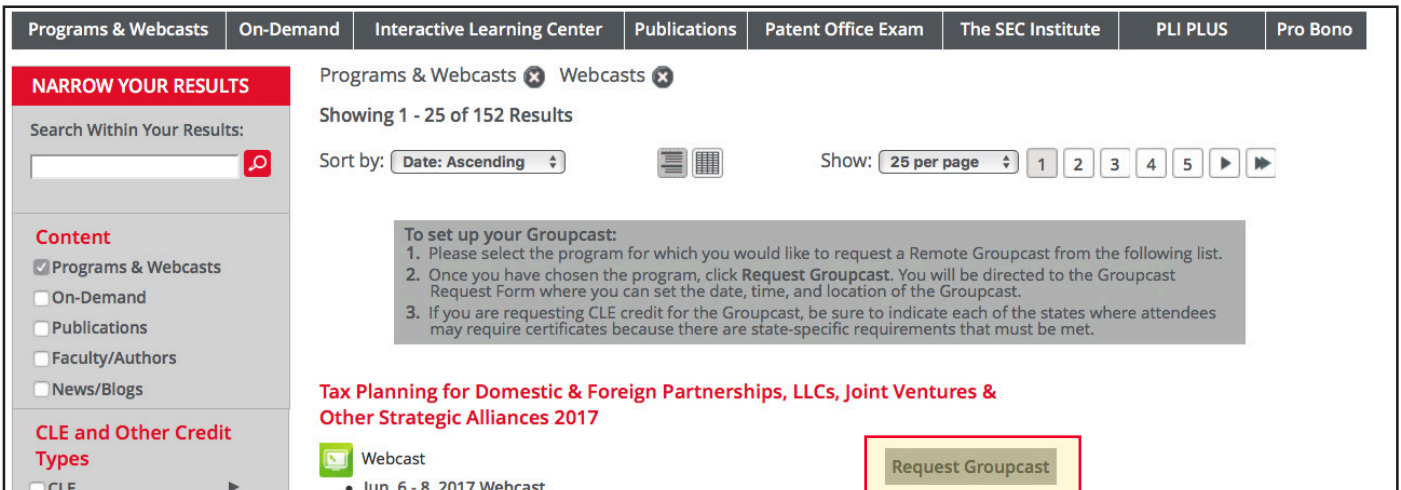
- The Groupcast, for Live programs, must be held **on the date requested**.
- There must be **at least five attendees** for a program to qualify as a Groupcast.
- There must be an **attendance monitor present** at the Groupcast who is not seeking credit.
- Some states require a qualified moderator to be present. **Verify your state-specific requirements**.
- All attendees must **sign in on a single attendance form**. No retroactive additions will be permitted.

## Scheduling a Groupcast

- Select your preferred program format type from the **Request Groupcast** tab drop-down menu.



- Once the search page has opened, select your program from the list or use the filters on the left. Click **“Request Groupcast”**. This may also be achieved by clicking **“Request Groupcast”** from any Webcast or On-Demand Program detail page.





# Scheduling a Groupcast (continued)

- Complete the **Request Groupcast** form pop-up, including date, time, location, credit types and jurisdictions where seeking credit. Click **“Save Draft”** to continue working at a later date, or click **“Submit for Approval”** for review by the PLI Groupcast Department. You will be contacted directly if further information is required.

1. Click **“Add Location”** if you plan to hold the Groupcast in multiple locations. Time zones will automatically adjust for live webcasts.
2. **Credit Jurisdictions:** Select the type of credit and states where your attendees require credit by checking the appropriate boxes from the drop-down menu and clicking **“Add”**. State-specific information will appear at the bottom of the screen.

### Request Groupcast

**Tax Planning for Domestic & Foreign Partnerships, LLCs, Joint Ventures & Other Strategic Alliances 2017**

**1 Add Location**

**SELECT LOCATION**

Date and Time: 06/06/2017 9 : 00 AM  
TimeZone: (UTC-08:00) Pacific Time (US & Canada)  
Location: Select Location...  
Requested Location Details:  
Contact Phone Number:

**Credit Jurisdictions: 2**

Select options Add  
CLE-PA Remove  
 No Credit Requested

**Copy To All Locations**

**Organizer Email:**

**Additional Information:**

**Pennsylvania:** PLI requires 35 days' notice for groupcast requests in order to apply to the Pennsylvania CLE Board. According to the Pennsylvania Continuing Legal Education Board, live and on-demand groupcasts qualify for "live credit." On-demand groupcasts require the presence of a qualified moderator, or no credit will be awarded. The moderator must sign an affirmation and return it to PLI along with a bio. Remote groupcasts must be open to all attorneys.

**Save Draft** **Submit for Approval**

- The Groupcast organizer will be notified by email once the Groupcast status is updated to **“Approved”**.
  - **On-Demand Groupcasts:** The On-Demand Groupcast email will contain a link to the program, as well as specific instructions for the Groupcast including obtaining credit and accessing Course Materials. A reminder email will also be sent the day prior to the Groupcast.
  - **Live Webcast Groupcasts:** Two weeks prior to Live Webcast Groupcasts, an email will be sent containing the program link and instructions. A reminder email will also be sent the day prior to the Groupcast.

# Groupcast Summary

## Groupcast Summary Tools

The **Groupcast Summary** page, selected from the Request Groupcast drop-down tab, includes all pending and scheduled upcoming Groupcasts, as well as canceled or completed Groupcasts.

Action tools on the right side of each row enable you to:

- View the program overview
- Edit your Groupcast Request
- Enter attendance post-program and submit for CLE
- Upload a PDF of the attendance sheet (all attendance sheets and forms may also be sent by email to groupcasts@pli.edu)
- Cancel an upcoming Groupcast

Programs & Webcasts	On-Demand	Interactive Learning Center	Publications	Patent Office Exam	The SEC Institute	PLI PLUS	Pro Bono
Home	Roster	Registrations	<b>Request Groupcast</b>	My Lists	Administrative Users	Reports	Membership Suite for Practising Law Institute
<b>Groupcast Summary</b>							Excel PDF Print
Show Cancelled and Completed Groupcasts <input type="checkbox"/>							
Groupcast	Location	Date	Status	Statistics	Action		
Compliance and Criminal Enforcement Options for Noncompliant International Taxpayers	New York, NY, 1177 Avenue, test 5/27/2017 10:00 AM EST	May. 27, 2017	Approved	Registered: 1 Attended: 0 Cancelled: 0	Program Overview Edit Enter Attendance Upload Attendance Cancel		

## Groupcast Summary

Review a scheduled Groupcast by clicking on the program title.

Options here include:

1. **Export Registration List** in multiple formats to save for your records
2. **Launch Groupcast** opens the link and begins the Groupcast
3. **Groupcast Tools** include:
  - **View Attendee Report:** View saved or submitted registrations
  - **Edit:** Make changes to the registration and attendance
  - **Enter Attendance:** Enter attendance electronically post-program and submit for credit
  - **Upload Attendance:** Upload required documentation for PLI to issue certificates
  - **Cancel:** Cancel requested Groupcast
  - **Repeat Groupcast:** Create another Groupcast of the program in another location
  - **Email Groupcast link:** Send link via email
4. **Registration Tools** allow the removal or invitation of additional attendees.

**Groupcast: Compliance and Criminal Enforcement Options for Noncompliant International Taxpayers**

Requested Locations: New York, NY      Requested Credit Types: MCLE: AZ, CA

Status: Approved  
Registered to date: 0  
Attended: 0  
Export Registration List:  
Excel PDF Print

Launch Groupcast

Program Overview  
View Attendee Report  
Edit  
Enter Attendance  
Upload Attendance  
Cancel  
Repeat Groupcast  
Email Groupcast Link

Selected 0 of 0      Remove User | Invite From Roster | Send Invite Email

Quick Search (Name, Office, Department or Email):

## Day of the Groupcast

At the scheduled time for your Groupcast, open the link from your email or launch the Groupcast from the Groupcast page (**Groupcast Summary > Launch Groupcast**).

- Required attendance forms can be found on the launched Groupcast link under **“Course Materials”** and **“Request Credit”**. The forms can also be found linked in your confirmation and reminder emails.
- Attendance forms can be submitted via **Membership Suite** or emailed to **groupcasts@pli.edu** for credit to be issued by PLI. All registered attendees must have their status updated (attended, no-show, etc.).

## Course Materials

From the Groupcast link, select **“Continue on to the Program”** and click on the **Course Materials** tab in the upper right corner of the window. From here, you can print copies for attendees. Bound Course Handbooks may also be purchased separately by contacting **groupcasts@pli.edu**.\*



## Attendance Verification Forms

1. **Form A** (Groupcast Information) must be filled out by the Attendance Monitor.
2. **Form B** (Groupcast Sign-In Sheet) must be used by all attendees to sign in and out.
3. **Form C** (Program Evaluation) and **Form D** (Request for Credit) must be completed by each attendee.
4. **Form E** (Qualified Moderator Affirmation) must be completed and signed by a qualified moderator if you are requesting Arkansas, Pennsylvania, Tennessee or CPE credit for an On-Demand Groupcast or Mississippi credit for any Groupcast, as well as including the moderator's bio.
5. Scanned copies of **Forms A-E** must be emailed to **groupcasts@pli.edu** (or uploaded via **Membership Suite**) within two business days of the Groupcast.
6. **No credit will be granted** for attendees who have not signed in/out on the attendance sheet. No retroactive additions are permitted.
7. If taking place in multiple locations, please submit Groupcast attendance forms for all locations at one time via **Membership Suite** or in a single email.

### Form A – Attendance Monitor

### Form B – Sign-In Sheet

### Form C – Program Evaluation

### Form D – Request for Credit

### Form E – Qualified Moderator

### State-Specific Requirements

\* The course materials and PLI Course Handbook are for the personal use of Groupcast attendees. Distribution of the course materials or individual chapters is strictly prohibited, and receipt of the Course Handbook or individual chapters does not confer upon the recipient(s) any rights to reproduce, distribute, exhibit or post the content without the express permission of the copyright holders. This includes electronic distribution and downloading of materials to an internal or external server or to a shared drive. If you have any questions, or would like to request permission, please contact [libraryrelations@pli.edu](mailto:libraryrelations@pli.edu).

# Receiving Groupcast Credit

## After the Groupcast: Reconciling Attendance

Reconciling Groupcast attendance can expedite the issuing of credits. We recommend the following steps to facilitate the process:

- Register attendees who were not pre-registered:
  - Go to **Groupcast Queue > View > Register from Roster**.
  - Select individuals by clicking the red plus sign to the left of their names, indicate their location (if multiple locations are being held) and click **“Register”**.
- Click **“Enter Attendance”** next to the Groupcast on the Queue page or in the program tools.
  - Enter the attendance for individuals by using the drop-down menu to select **“Full”**, **“Partial”** or **“Absent”**. **Attendance cannot be uploaded until every attendee has their status entered.**
- For each location, enter the moderator’s name at both the top and bottom of the form, and check the box at the bottom of the form.
- Once complete, click **“Save Attendance”** to keep the form as a draft, or **“Submit for Certificates”** to send Groupcast attendance to the PLI CLE department for processing.

**NOTE: Once submitted, no further changes can be made. If changes are required, contact: groupcasts@pli.edu.**

The screenshot shows the 'Attendance' form for the groupcast 'Building Better Construction Contracts'. The form includes fields for 'Location' (New York, NY, 1177 Avenue of the Americas), 'Date Completed' (01/26/2017), and an 'Attendance Monitor' field. A note states: 'By checking the box, I affirm that 1) I served as the attendance monitor for the above referenced program, 2) I tracked the attendance times for each program participant, and 3) the attendance data supplied is accurate.' There is also a 'Qualified Moderator' field. A table displays attendance data for three entries on 1/26/2017. The first entry is for 'Introduction' (0h:3m) with a 'Partial' status. The second entry is for 'Introduction' (0h:3m) with a 'Full' status. The third entry is for 'Introduction' (0h:3m) with a 'Full' status. The table has columns for Name, Email, State/License, Date, Status, and Time/Duration. A note at the bottom states: 'Note: Individual attendees will be unable to receive CLE credit until both their State and Bar information have been entered.' Buttons for 'Save Attendance', 'Submit This Location For Certificates', and 'Submit All Locations For Certificates' are visible.

Name	Email	State/License	Date	Status	Time/Duration
		NY AL	1/26/2017	Partial	0h:3m
		CP CA NY	1/26/2017	Full	0h:3m
		NJ IL WA FL IP AK	1/26/2017	Full	0h:3m

# Print or Save Certificates / My Lists

## Print or Save CLE Certificates:

1. **Click** on Roster
2. **Search** for the individual
3. **Click** on Individual
4. Bottom box will have CLE certificates by year – search click and print or save

The screenshot shows the PLI Practising Law Institute website. At the top, there is a navigation bar with 'Welcome Cory', 'My Account', 'My Cart', 'Logout', 'Contact Us', and 'CHAT NOW'. Below this is a search bar with 'EVER CURRENT' and a search button. The main navigation menu includes 'Programs & Webcasts', 'On-Demand', 'Interactive Learning Center', 'Publications', 'Patent Office Exam', 'The SEC Institute', 'PLI PLUS', and 'Pro Bono'. The user is currently on the 'My Lists' page, which shows a profile for 'Daniel [redacted]' with contact information and practice areas. A 'Credit History' section for '2019' is highlighted with a red box, showing a table of CLE-AK - 2019 credits.

ITEM	CREDITS
Software Licensing and Open Source Licenses	1.00 General
51st Annual Immigration and Naturalization Institute	2.00 General
<b>TOTAL for CLE-AK:</b>	<b>3.00 Credits</b>

## From “My Lists” you can:

1. **Create** multiple custom lists of selected programs
2. **Publicize** selected programs to roster members by email
3. **Save** lists by exporting them to the roster
4. **Click** on a program title for more information
5. **Register/remove** members for a program, or request a Groupcast

The screenshot shows the 'My Lists' interface on the PLI website. It includes a 'My Lists' section with a 'Default List' dropdown, a 'Delete' button, and a 'Create' button. Below this is a table of programs with columns for Title, Type, Location, Date, and Action. The first row is highlighted with a red box and a '4' in a red circle, and the 'Register' and 'Remove' buttons for that row are highlighted with a red box and a '5' in a red circle.

Title	Type	Location	Date	Action
Patent Eligibility, Prior Art and Obviousness 2017: Current Trends in Sections 101, 102, and 103	Live Seminar	San Francisco, CA	Jun. 13, 2017	Register Remove
Fundamentals of Broker-Dealer Regulation 2017	PLI Grpcast-Live Web	New Brunswick, NJ	Jul. 17, 2017	Register Remove
Basics of Accounting for Lawyers 2017: What Every Practicing Lawyer Needs to Know San Francisco	Live Webcast	from San Francisco, CA	Jul. 20 - 21, 2017	Register Request Groupcast Remove

# Update Administrative Users

## Adding New Administrators

Your account is set up with one individual as the **Primary PD** or administrator. To add **Membership Suite** access for other administrators, click the **“Administrative Users”** tab. Up to 15 administrators may be linked to one Privileged Member organization.

All current administrators will be listed on this page. To add a new administrator from your roster:

- Select **“Add Administrator”** and add the individual’s email address.
- Check boxes and select **“Remove Selected Administrator”** to remove any individuals from the list.

Select All	Office	First	Middle	Last	Email
<input type="checkbox"/>	New York, NY				
<input type="checkbox"/>	New York, NY				
<input type="checkbox"/>	New York, NY				
Primary PD	New York, NY				
<input type="checkbox"/>	New York, NY				
<input type="checkbox"/>	New York, NY				

- Use the **“Lookup Member”** functionality to find the email of a new administrator. (Note: The individual must currently appear on the roster.)

**Add Administrative User** X

Business Email:

This firm has reached the maximum number of administrators. Please remove some before adding more administrators.

Lookup Member

## Reports

Attendance reports are available under the Reports tab. From here you can run customized reports based on date range, usage category, individuals, departments or locations.

To run a report, fill out the form and click **Run Report**.

Programs & Webcasts | On-Demand | Interactive Learning Center | Publications | Patent Office Exam | The SEC Institute | PLI PLUS | Pro Bono

Home | Roster | Registrations | Request Groupcast | My Lists | Administrative Users | Reports | Membership Suite for Practising Law Institute

**Start Date**

 mm/dd/yy

**End Date** Enter date range

 mm/dd/yy

**Select Usage Category**

All Usage Categories  
 Audio Download  
 Groupcast  
 Live Audio Webcast  
 Online  
 Programs  
 SECI  
 Video Download

Select "All" or specific usage type

**Group Report by Usage Category**

**Individual's Name**

**Department** Narrow search by individual, department or location

**Location**

## Report Example

Home | Roster | Registrations | Request Groupcast | My Lists | Administrative Users | Reports | Membership Suite for Practising Law Institute

<< Back To Search

Dates: from 1/1/2017 to 6/30/2017

Search Product Types: Groupcast, Live Audio Webcast, Audio Download, Video Download, Programs, SECI, Online

Location: All Office Locations

Department: All Departments

Report Date: 6/8/2017

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**Practising Law Institute**

☏ New York, NY ( 1177 Avenue of the Americas )

Total Attendees = 2857, Total Price = \$1,902,765.91

Organization	Organization Location	Item ID	Location	Item Class	Item Desc	Start Date	End Date	Indv ID	Name	Attendees	Retail Price	Department
Practising Law Institute	152413-Practising Law Institute-New York, NY	212311		Audio Only On-Demand Web	Say Yes to Less Stress: A Mindfulness Training for Lawyers	5/3/2017	5/3/2017	1088135		1	\$129.00	Research And Development
Practising Law Institute	152413-Practising Law Institute-New York, NY	215611		Audio Only On-Demand Web	Consumer Data Privacy Legislation: Who's Stepping Back and Who's Stepping Up	6/6/2017	6/6/2017	1117562		1	\$129.00	Membership Services