Career Readiness Courseware & Credentials

Class Management

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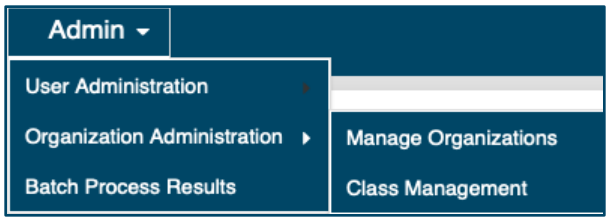
Introduction

A new Class Management module was released on the night of October 22, 2019. Class Management has been completely redesigned to be more intuitive and easier to use, with fewer steps to create and populate class rosters. In addition, new features have been added such as the ability to print rosters, reset classes, and filter more effectively for learners.

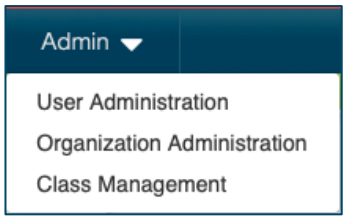
Creating a New Class

First, navigate to **Class Management** through the menu header drop downs:
Admin > Organization Admin > Class Management.

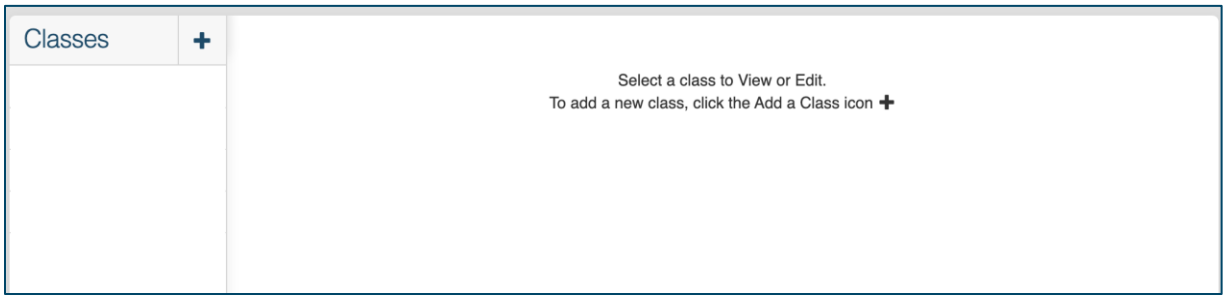
New Dashboard



Old Dashboard

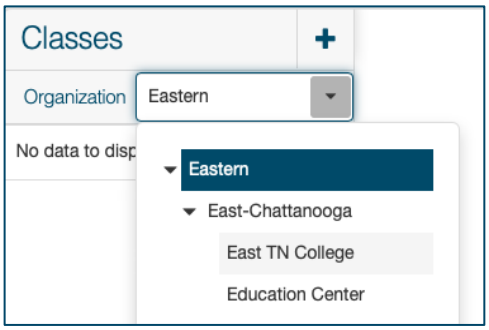


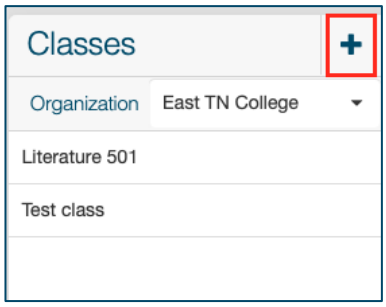
Below is a class management page with no classes.



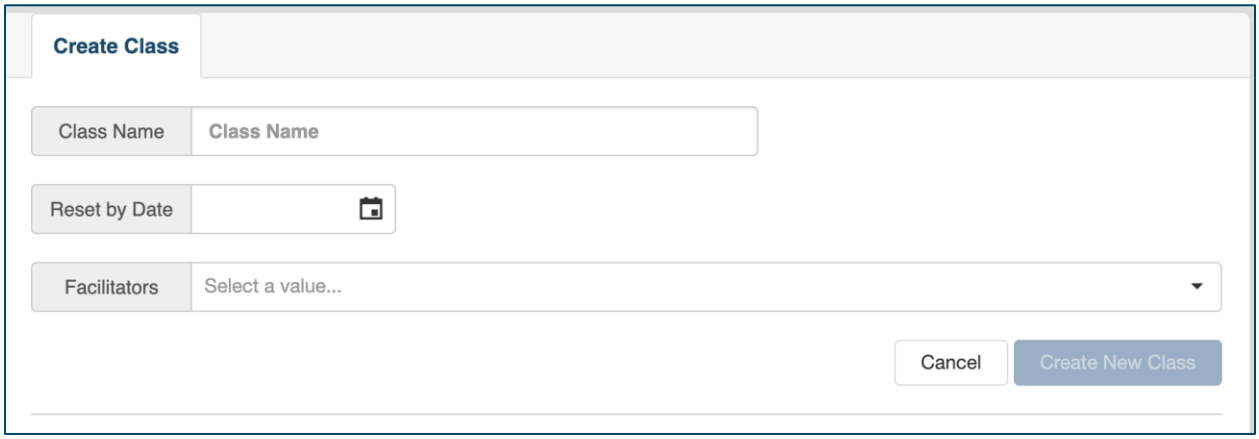
Select the blue plus sign + to create a new class.

To create a class as an Administrator over several organizations, use the organization drop down to select the organization and then select the blue plus sign to create the class.





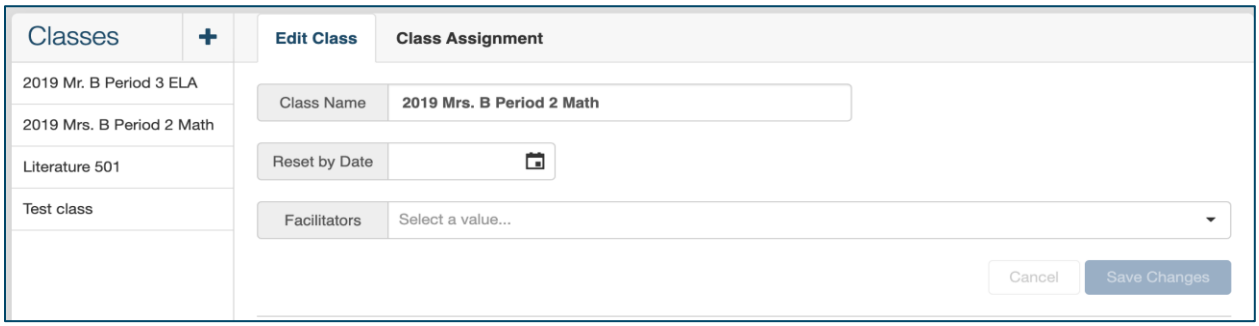
Once the blue plus sign is selected, the Create Class screen will appear.



The minimum information required to create a class is **Class Name**. Type in the class name and select **Create New Class**.

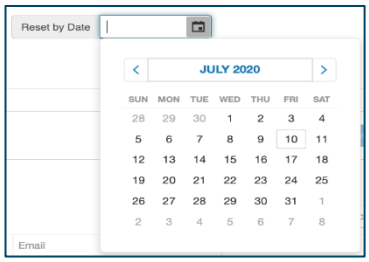
Note: The class name must be unique within the organization. Ideas to ensure uniqueness are to include the year, class period, or other identifying feature of the class. For example, "2019 Mrs. B Period 2 Math".

The new class will appear in the list of classes on the left panel and the Class Assignment tab will appear:



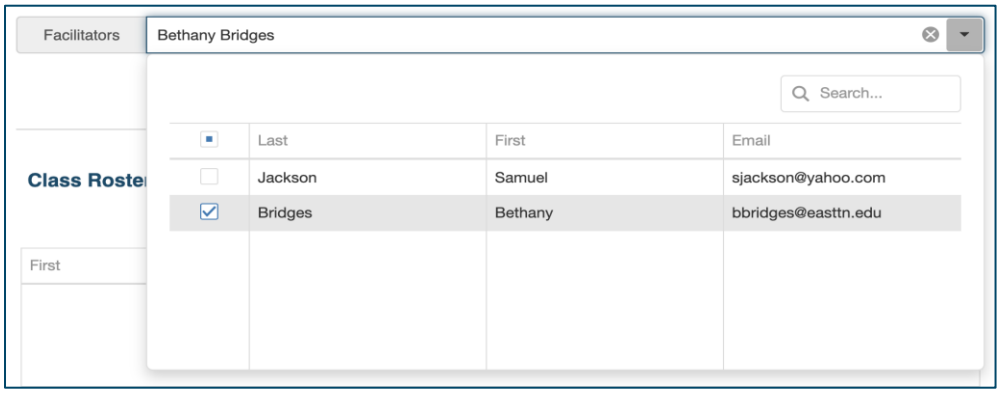
Reset by Date will clear all learners from the class on a designated date so new learners can be added.

Reports can be generated for the class after it has been reset. Navigate to Class Reports and select the date range the class used the system.



Assigning Facilitators

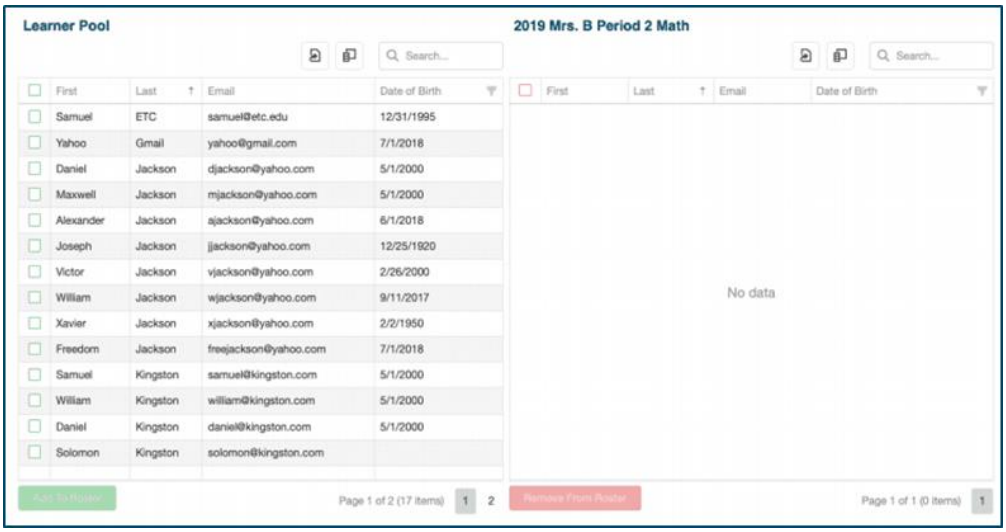
During the Create a Class process or any time after, facilitators can be added. To add facilitators, click in the **Facilitators** box and a list of available facilitators will appear. Select the checkbox next to each facilitator to be added to the class. More than one facilitator may be added. Be sure to select **Save Changes**. To find a particular facilitator easily in a long list, use the **Search** feature.



Assigning Learners

After the class is created, learners can be assigned. Go to the **Class Assignment** tab, which becomes visible after the class is created.

The **Learner Pool** will be on the left, which displays all learners in the organization who are able to be added to the class roster. On the right is the empty **Class Roster**.

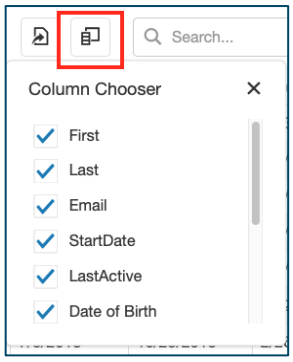


Column Chooser

By default, the grid displays the columns: First name, Last name, Email, and if available, Date of Birth for each learner. To add columns with additional learner data, select the **Column Chooser** icon.

Note: The data available depends on the set up of the portal client.

Select the **Column Chooser** icon and then select from the list the data to be displayed in the grid.



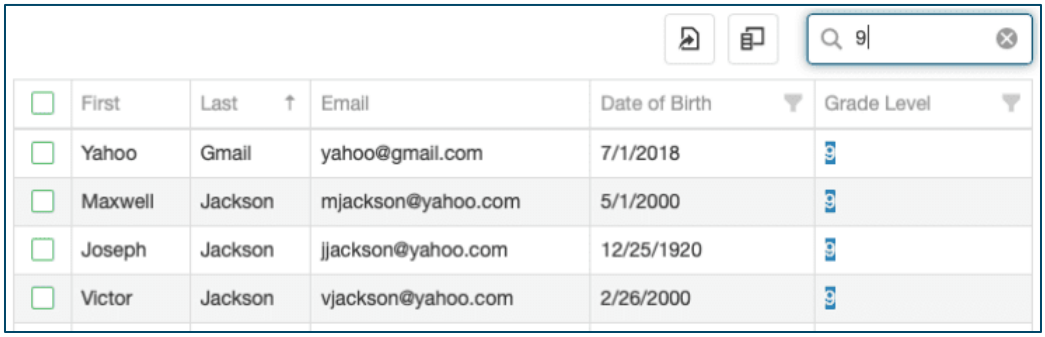
StartDate and LastActive were added to the grid below in addition to the default columns.

First	Last	Email	StartDate	LastActi...	Date of Birth
Daniel	Jackson	djackson@yahoo.com	6/27/2018	4/12/2019	5/1/2000
Alexander	Jackson	ajackson@yahoo.com	7/2/2018	3/5/2019	6/1/2018
William	Jackson	wjackson@yahoo.com	7/6/2018	7/27/2018	9/11/2017
Xavier	Jackson	xjackson@yahoo.com	7/6/2018	10/18/2018	2/2/1950
Leaving	Soon	leaving@soon.edu	7/18/2018	7/18/2018	7/1/2018
Freedom	Jackson	freejackson@yahoo.com	7/25/2018	7/25/2018	7/1/2018
Jehosha...	Kingston	johoshaphat@kingston...	8/23/2018		5/1/2000
Solomon	Kingston	solomon@kingston.com	8/23/2018		

Search, Sort, and Filter

The Learner Pool may be several pages long. There are many ways to narrow down the Learner Pool by using **Search**, **Sort,** and/or **Filters**.

Use the **Search** box to search for any non-date data to help locate a particular learner or set of learners. For example, enter a learner's email address to find that particular learner, or enter Smith to see all learners with Smith in their names. Enter 9 to find all learners with a 9 in any of the columns.



First	Last	Email	Date of Birth	Grade Level
Yahoo	Gmail	yahoo@gmail.com	7/1/2018	
Maxwell	Jackson	mjackson@yahoo.com	5/1/2000	
Joseph	Jackson	jjackson@yahoo.com	12/25/1920	
Victor	Jackson	vjackson@yahoo.com	2/26/2000	

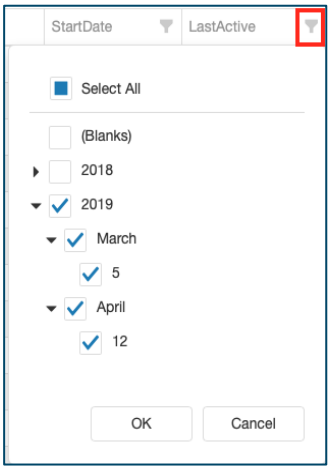
Sort columns by clicking on the column header. The data will sort in ascending or descending order. In the example below, the First Name column is sorted in ascending order.

First	Last	Email	Date of Birth	Grade Level
Alexander	Jackson	ajackson@yahoo.com	6/1/2018	
Daniel	Jackson	djackson@yahoo.com	5/1/2000	
Daniel	Kingston	daniel@kingston.com	5/1/2000	Adult Ed
Freedom	Jackson	freejackson@yahoo.com	7/1/2018	
Jehoshap...	Kingston	johoshaphat@kingston...	5/1/2000	10
Leaving	Soon	leaving@soon.edu	7/1/2018	
Samuel	ETC	samuel@etc.edu	12/31/1995	Adult Ed
Samuel	Kingston	samuel@kingston.com	5/1/2000	Workforce
Solomon	Kingston	solomon@kingston.com		13
Team	Tame	team@tame.com	12/12/2100	7
William	Jackson	wjackson@yahoo.com	9/11/2017	
William	Kingston	william@kingston.com	5/1/2000	Other
Xavier	Jackson	xjackson@yahoo.com	2/2/1950	

Note: Use the scroll bar along the bottom of the grid to see across all columns. Resize columns by selecting and adjusting the horizontal grid line between columns, as with any spreadsheet.

By using the column filters, a large Learner Pool list can be narrowed down to easily find the learners to add to the class roster.

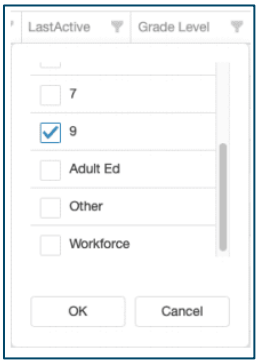
Since Last Active was added to the grid, learners can be filtered by Last Active or within a certain date range by clicking the funnel in the LastActive column header. This opens a selection box where dates can be selected.



Select **OK** and to receive a filtered list of learners who were last active in 2019. The column filter is active when it becomes dark gray.

First	Last	Email	StartDate	LastActive
Alexander	Jackson	ajackson@yahoo.com	7/2/2018	3/5/2019
Daniel	Jackson	djackson@yahoo.com	6/27/2018	4/12/2019

Example: If a class of ninth graders was created and Grade Level is a data point collected, learners of the ninth grade can be found by filtering the Grade Level column by 9.



First	Last	Email	StartDate	LastActive	Grade Level
Yahoo	Gmail	yahoo@gmail.com	7/25/2018		9
Maxwell	Jackson	mjackson@yahoo.com	6/27/2018	10/18/2018	9
Joseph	Jackson	jjackson@yahoo.com	7/5/2018	10/25/2018	9
Victor	Jackson	vjackson@yahoo.com	7/5/2018	10/25/2018	9

Add to Roster and Remove from Roster

Once the Learner Pool is filtered down to a reasonable list, build the roster by selecting the green check mark next to each learner to add them the roster. Select all by clicking the green check mark at the very top left, in line with the column headers.

Note: The Learner Pool does not need to be narrowed down to add learners to the roster. Scroll down the list to select the learners.

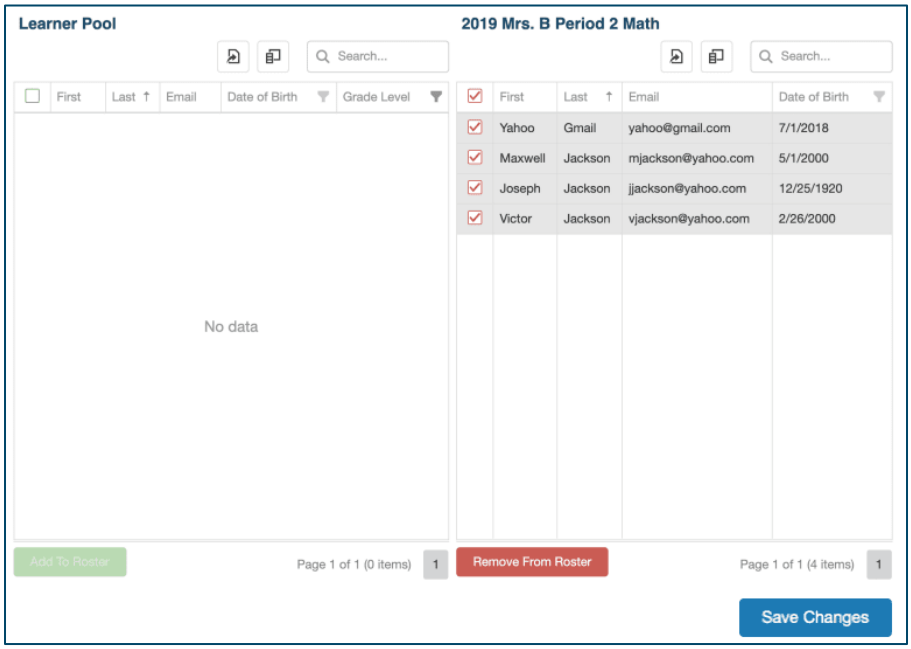
Once the learners are selected, click **Add to Roster**.

First	Last	Email	LastActive	Grade Level
Joseph	Jackson	jjackson@yahoo.com	10/25/2018	9
Maxwell	Jackson	mjackson@yahoo.com	10/18/2018	9
Victor	Jackson	vjackson@yahoo.com	10/25/2018	9
Yahoo	Gmail	yahoo@gmail.com		9

Add To Roster

The learners selected move from the Learner Pool grid to the Roster (in this case named 2019 Mrs. B Period 2 Math). The learners will have the red check marks in case they need to be removed before saving changes. Click **Remove From Roster** to remove those, or any learners. Next click **Save Changes**, the red check marks will disappear, and the roster will be saved.

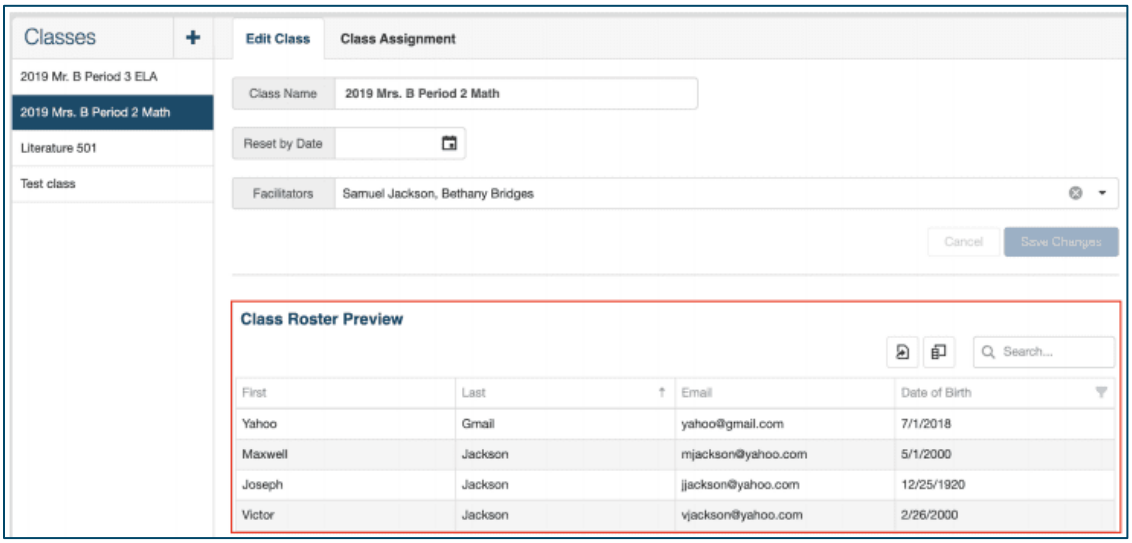
Remove learners by selecting the red check mark next to the learner's name and then Remove From Roster. Add new learners to the roster as needed by selecting learners from the Learner Pool and then selecting Add to Roster.



Note: Learners may still be in the Learner Pool grid if all have not been moved over to the roster. Be sure to undo any filters that may have been applied in order to see other learners.

Class Roster Preview

Now the class roster is created, navigate back to the **Edit Class** tab and the new class will be displayed in the **Class Roster Preview** grid.



Use the Column Chooser to add columns to the Class Roster Preview grid.

Editing an Existing Class

To edit an existing class, locate the class from the list in the left panel. If more than one organization is available, use the organization tree to navigate to the desired class.

Note: Teachers can only see the classes to which they belong. If a teacher needs access to a class, another teacher with access or an administrator with access can add them.

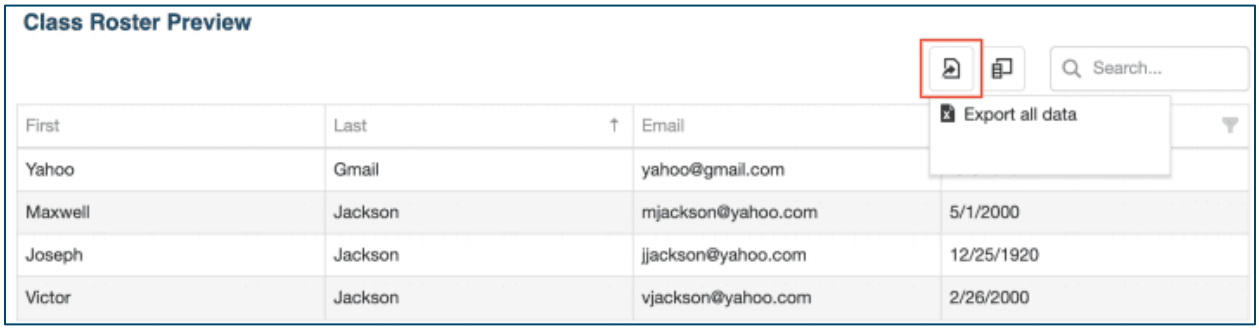
On the **Edit Class** screen, edit the class name, the reset date, and/or the facilitators, then click Save Changes.

On the **Class Assignmen**t screen, edit the roster of learners in the class. Use the steps above on how to add or remove learners from the class roster.

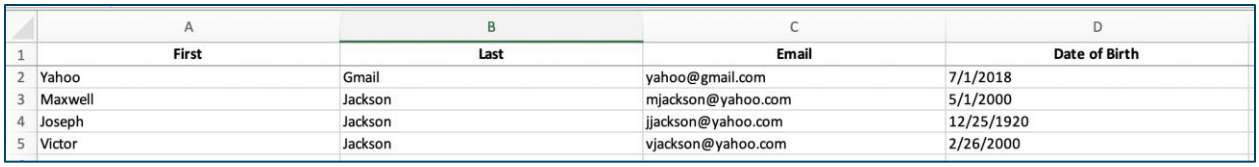
Exporting Rosters

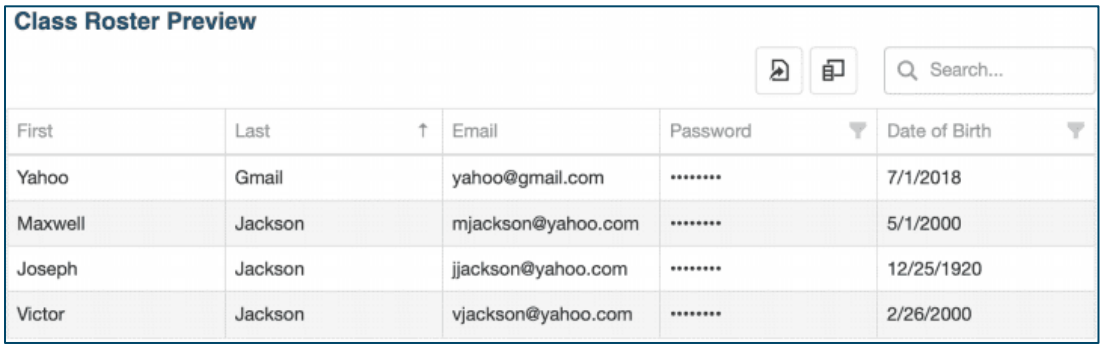
All three grids have Export to Excel enabled: the Learner Pool and Class Roster grids in Class Assignment, and the Class Roster Preview grid in Edit Class.

To export a class roster, configure the roster with the columns to export using the Column Chooser. Then select the Export icon in the top right corner of the grid. Select **Export all data**. This will export all data in the columns selected, even if it spans multiple pages.



Excel:



	A	B	C	D
1	First	Last	Email	Date of Birth
2	Yahoo	Gmail	yahoo@gmail.com	7/1/2018
3	Maxwell	Jackson	mjackson@yahoo.com	5/1/2000
4	Joseph	Jackson	jjackson@yahoo.com	12/25/1920
5	Victor	Jackson	vjackson@yahoo.com	2/26/2000

Note: Passwords can only be added to the Class Roster Preview grid on the Edit Class screen. Select Password from the Column Chooser. Passwords will be hidden on the screen but will appear when exported.