

# CRS Create and Manage Classes

[winlearning.zohosites.com/WIN System/crs-create-and-manage-classes](http://winlearning.zohosites.com/WIN_System/crs-create-and-manage-classes)

## WIN Career Readiness System: Class Management

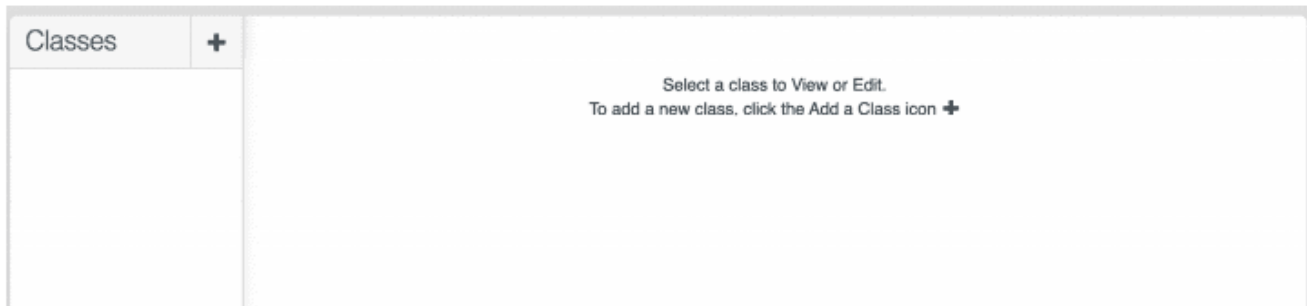
### [Download the Class Management Guide](#)

Class Management can be used to create and populate class rosters. A class list can be exported to Excel. Class Reports are available in the Version 2.0 reports.

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

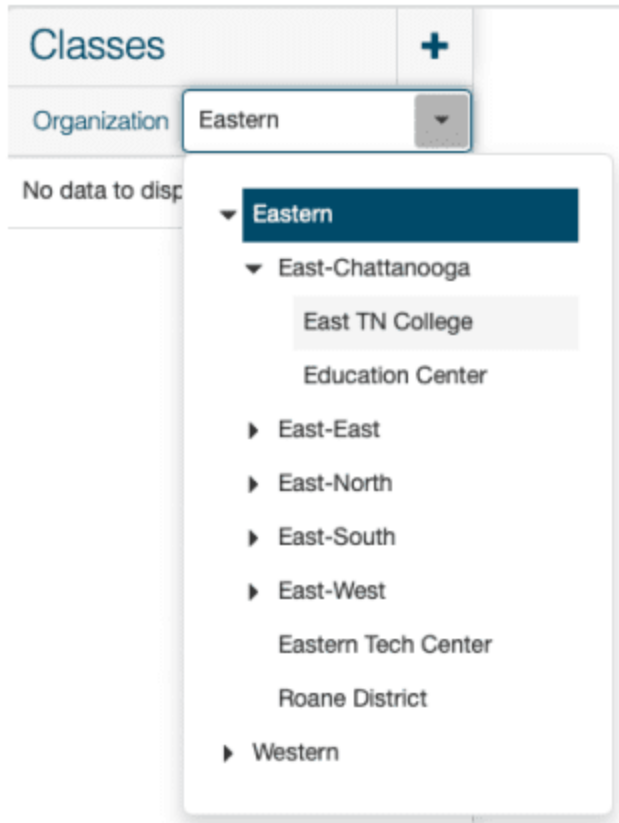


Below is a class management page with no classes.



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.

A screenshot of the "Create Class" form. The form has a header with the text "Create Class". Below the header are three input fields: "Class Name" (with a placeholder "Class Name"), "Reset by Date" (with a calendar icon), and "Facilitators" (with a placeholder "Select a value..."). At the bottom right of the form are two buttons: "Cancel" and "Create New Class".

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 include the year, class period, or other identifying features 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. **Archive by Date** will archive the class and the class will only appear in the class list if **Display Archived Classes** is selected.

The screenshot shows a 'Classes' management interface. On the left is a list of classes: '2019 Mr. B Period 3 ELA', '2019 Mrs. B Period 2 Math', 'Literature 501', and 'Test class'. The main area is titled 'Class Assignment' and contains the following fields: 'Class Name' with the value '2019 Mrs. B Period 2 Math', 'Reset by Date' with a calendar icon, and 'Facilitators' with a dropdown menu showing 'Select a value...'. At the bottom right are 'Cancel' and 'Save Changes' buttons.

This image is a close-up of the 'Reset by Date' field. It shows a calendar for 'JULY 2020'. The date '10' is selected and highlighted with a red border. The calendar grid shows days from Sunday to Saturday. Below the calendar, the 'Email' field is partially visible.

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.

Facilitators **Bethany Bridges** ✕ ▾

Search...

<input type="checkbox"/>	Last	First	Email
<input type="checkbox"/>	Jackson	Samuel	sjackson@yahoo.com
<input checked="" type="checkbox"/>	Bridges	Bethany	bbridges@easttn.edu

Class Roster

First

**Save Changes**

## 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**.

<input type="checkbox"/>	First	Last	↑	Email	Date of Birth	▼
<input type="checkbox"/>	Samuel	ETC		samuel@etc.edu	12/31/1995	
<input type="checkbox"/>	Yahoo	Gmail		yahoo@gmail.com	7/1/2018	
<input type="checkbox"/>	Daniel	Jackson		djackson@yahoo.com	5/1/2000	
<input type="checkbox"/>	Maxwell	Jackson		mjackson@yahoo.com	5/1/2000	
<input type="checkbox"/>	Alexander	Jackson		sjackson@yahoo.com	6/1/2018	
<input type="checkbox"/>	Joseph	Jackson		jjackson@yahoo.com	12/25/1920	
<input type="checkbox"/>	Victor	Jackson		vjackson@yahoo.com	2/26/2000	
<input type="checkbox"/>	William	Jackson		wjackson@yahoo.com	9/11/2017	
<input type="checkbox"/>	Xavier	Jackson		xjackson@yahoo.com	2/2/1950	
<input type="checkbox"/>	Freedom	Jackson		freejackson@yahoo.com	7/1/2018	
<input type="checkbox"/>	Samuel	Kingston		samuel@kingston.com	5/1/2000	
<input type="checkbox"/>	William	Kingston		william@kingston.com	5/1/2000	
<input type="checkbox"/>	Daniel	Kingston		daniel@kingston.com	5/1/2000	
<input type="checkbox"/>	Solomon	Kingston		solomon@kingston.com		

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1 2

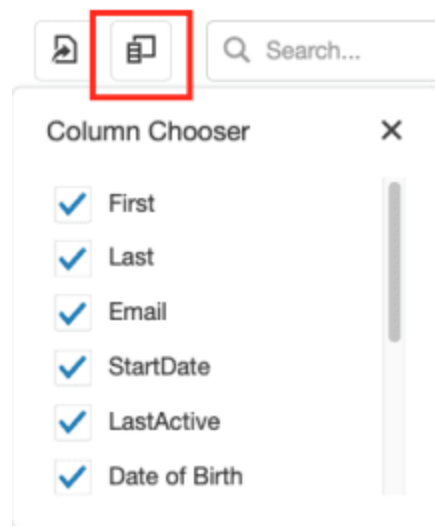
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1

## 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 your 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		
Team	Tame	team@tame.com	8/19/2019		12/12/2100
Maxwell	Jackson	mjackson@yahoo.com	6/27/2018	10/18/2018	5/1/2000
Joseph	Jackson	jjackson@yahoo.com	7/5/2018	10/25/2018	12/25/1920
Victor	Jackson	vjackson@yahoo.com	7/5/2018	10/25/2018	2/26/2000
Yahoo	Gmail	yahoo@gmail.com	7/25/2018		7/1/2018
Samuel	ETC	samuel@etc.edu	7/16/2018	7/16/2018	12/31/1995

### 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 get all learners with Smith in their name. Enter 9 to see all learners who have 9 in any column.

<input type="checkbox"/>	First	Last ↑	Email	Date of Birth ▼	Grade Level ▼
<input type="checkbox"/>	Yahoo	Gmail	yahoo@gmail.com	7/1/2018	9
<input type="checkbox"/>	Maxwell	Jackson	mjackson@yahoo.com	5/1/2000	9
<input type="checkbox"/>	Joseph	Jackson	jjackson@yahoo.com	12/25/1920	9
<input type="checkbox"/>	Victor	Jackson	vjackson@yahoo.com	2/26/2000	9

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.

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

*Note: Use the scroll bar along the bottom of the grid to see across all of the columns. Resize columns by selecting and adjusting the horizontal grid line between columns, just like you would in a 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.

Each column can be narrowed down by sorting by several criteria (see screenshot below).

**Classes** + Edit Class Class Assignment

Organization 1234 Valencia

Display Archived Classes

2015 16Valencia1234

2017 Fletcher CRC

2019 DC class

2019 Dec Fletcher

autoClass1/6/2020

autoClass12/15/2019

autoDebug

Babies

Iris Class

Karl Test

new class

Period 1

Pre-Algebra

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**Class Assignment Instructions**

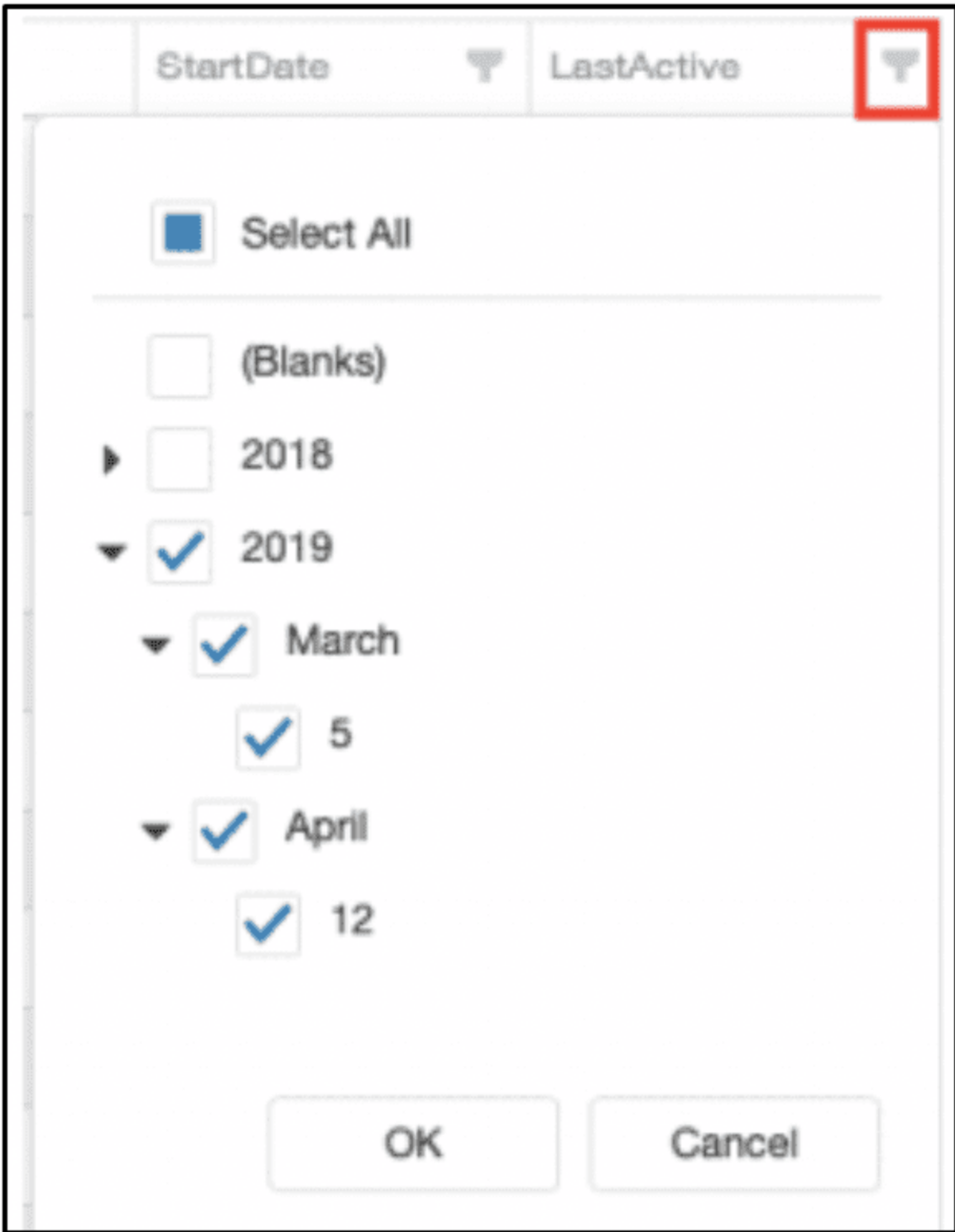
- Use the filters to narrow down the Learner Pool.
- Use the Column Chooser to add more data to the grid if needed.
- Add learners to the roster by selecting the checkboxes next to their names and then clicking **Add To Roster**.
- Remove learners from the roster by selecting their names and clicking **Remove From Roster**.

**Learner Pool**   Search...

<input type="checkbox"/>	First	Last	Email	Date of Birth
<input type="checkbox"/>	Q	s	Q	Q
<input type="checkbox"/>	Frosty	Contains	@gmail.com	
<input type="checkbox"/>	Joe	Does not contain	moe@win.com	
<input type="checkbox"/>	John	Starts with	n.Spence100282@wincrsystem.com	
<input type="checkbox"/>	Kelly	Ends with	ly.Sexton77867@wincrsystem.com	
<input type="checkbox"/>	New	Equals	wstudent@win.com	6/13/2000
<input type="checkbox"/>	Nicole	Does not equal	@123.com	7/1/2018
<input type="checkbox"/>	SMA	Reset	sma@gmail.com	1/1/1999
<input type="checkbox"/>	Student	Sample	student@sample.com	2/2/2020

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 Last Active column header. This opens a selection box where dates can be selected.





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

<input type="checkbox"/>	First	Last ↑	Email	StartDate ▼	LastActive ▼
<input type="checkbox"/>	Alexander	Jackson	ajackson@yahoo.com	7/2/2018	3/5/2019
<input type="checkbox"/>	Daniel	Jackson	djackson@yahoo.com	6/27/2018	4/12/2019

Filter by Grade Level, in this example 9.

LastActive ▼
Grade Level ▼

7  
 9  
 Adult Ed  
 Other  
 Workforce

<input type="checkbox"/>	First	Last ↑	Email	StartDate ▼	LastActive ▼	Grade Level ▼
<input type="checkbox"/>	Yahoo	Gmail	yahoo@gmail.com	7/25/2018		9
<input type="checkbox"/>	Maxwell	Jackson	mjackson@yahoo.com	6/27/2018	10/18/2018	9
<input type="checkbox"/>	Joseph	Jackson	jjackson@yahoo.com	7/5/2018	10/25/2018	9
<input type="checkbox"/>	Victor	Jackson	vjackson@yahoo.com	7/5/2018	10/25/2018	9

### Add to Roster...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: Narrowing the Learner Pool down in order to add learners to the roster is optional. Scroll through the list and select the learners if preferred*

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

<input checked="" type="checkbox"/>	First	Last	Email	LastActive	Grade Level
<input checked="" type="checkbox"/>	Joseph	Jackson	jjackson@yahoo.com	10/25/2018	9
<input checked="" type="checkbox"/>	Maxwell	Jackson	mjackson@yahoo.com	10/18/2018	9
<input checked="" type="checkbox"/>	Victor	Jackson	vjackson@yahoo.com	10/25/2018	9
<input checked="" type="checkbox"/>	Yahoo	Gmail	yahoo@gmail.com		9

**Add To Roster**

**Learner Pool**

**2019 Mrs. B Period 2 Math**

First Last ↑ Email Date of Birth ▼ Grade Level ▼

No data

First Last ↑ Email Date of Birth ▼

<input checked="" type="checkbox"/>	Yahoo	Gmail	yahoo@gmail.com	7/1/2018
<input checked="" type="checkbox"/>	Maxwell	Jackson	mjackson@yahoo.com	5/1/2000
<input checked="" type="checkbox"/>	Joseph	Jackson	jjackson@yahoo.com	12/25/1920
<input checked="" type="checkbox"/>	Victor	Jackson	vjackson@yahoo.com	2/26/2000

Add To Roster

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Remove From Roster

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**Save Changes**

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 learners. Next click **Save Changes** and 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 they have not been added to the class. Be sure to undo any filters that were applied 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.

The screenshot shows the 'Edit Class' interface. On the left, a sidebar lists classes: '2019 Mr. B Period 3 ELA', '2019 Mrs. B Period 2 Math' (selected), 'Literature 501', and 'Test class'. The main panel displays class details: 'Class Name' is '2019 Mrs. B Period 2 Math', 'Reset by Date' has a calendar icon, and 'Facilitators' are 'Samuel Jackson, Bethany Bridges'. At the bottom right are 'Cancel' and 'Save Changes' buttons. Below this is the 'Class Roster Preview' grid, which is highlighted with a red border. The grid has a search bar and a column chooser. The table data is as follows:

First	Last	Email	Date of Birth
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

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. Administrators of more than one organization will use the organization tree to navigate to the desired class.

*Note: Facilitators can only see the classes to which they belong. If a facilitator needs access to a class, another facilitator 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**.

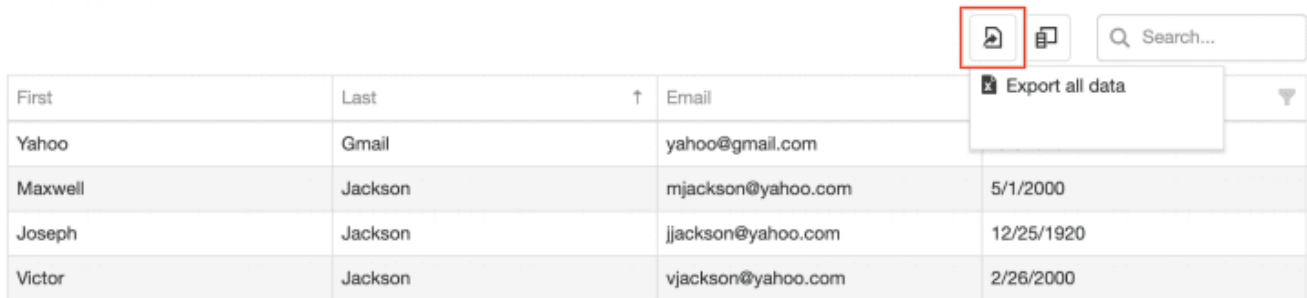
On the **Class Assignment** screen, edit the roster of learners in the class. Use the steps above to add or remove learners from the class roster.

## 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.

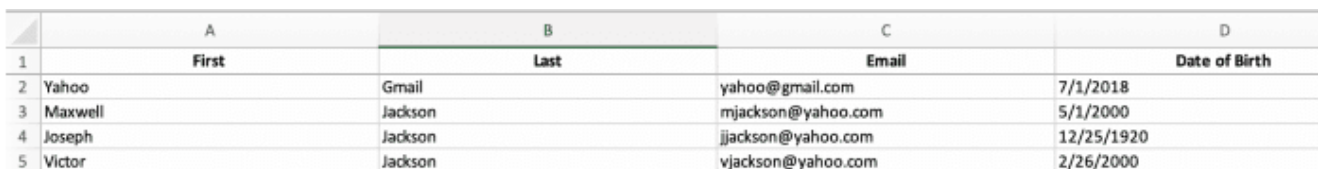
### Class Roster Preview



The screenshot shows a table with columns: First, Last, Email, and Date of Birth. The 'Export' icon (a document with a download arrow) is highlighted with a red box. A dropdown menu is open, showing the option 'Export all data'.

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

Excel:



The screenshot shows the data from the previous table in an Excel spreadsheet format with columns A, B, C, and D.

	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 obfuscated on the screen, but will export*

## Class Roster Preview



First	Last	Email	Password	Date of Birth
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

