Class Management

**Step-by-Step Guide**

Class Management

Introduction

A new Class Management module will be released on the night of October 22, 2019. Class Management has been completely redesigned to be more intuitive and easy 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.
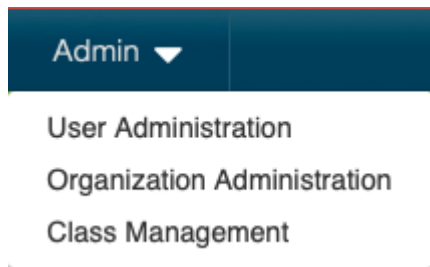
Creating a New Class

First, navigate to Class Management through the header drop downs:
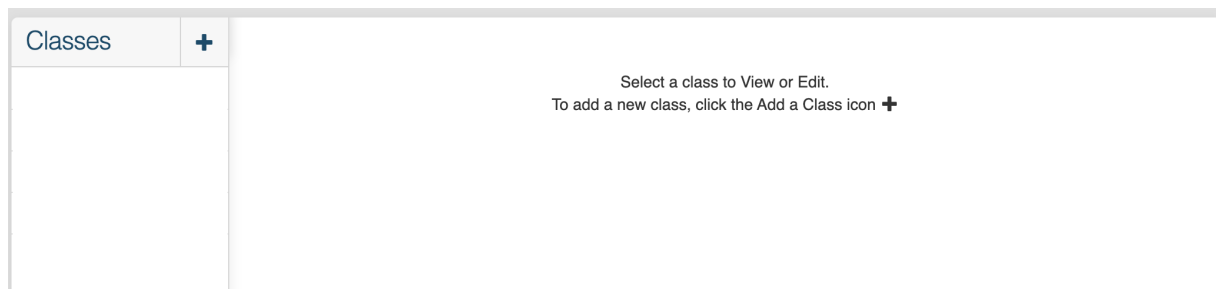Admin - Organization Admin - Class Management.

From the new dashboard, it looks like this:
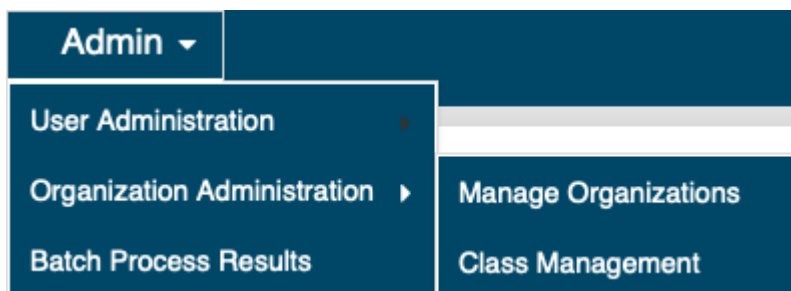
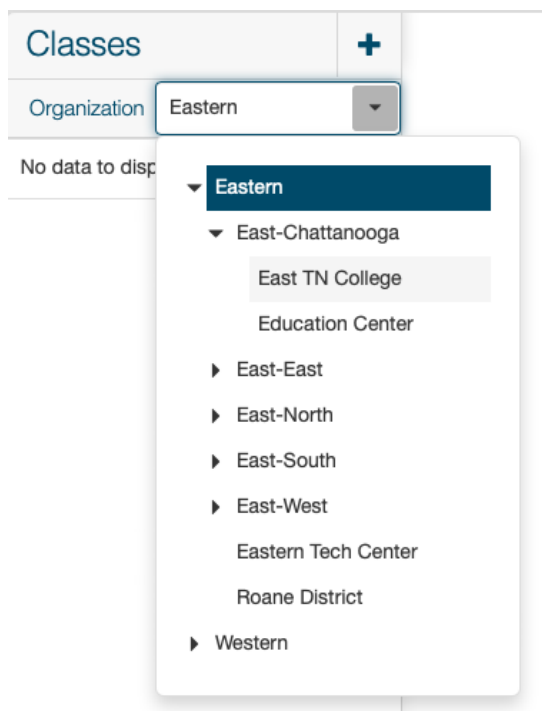From the old dashboard, it looks like this:

Admin ▼

User Administration

Organization Administration

Class Management

As a teacher with no classes yet, you will see this:

Classes	+

Select a class to View or Edit.
To add a new class, click the Add a Class icon +

Select the blue **+** create a new class.

If you are an administrator over several organizations, you will use the organization drop down to navigate to the organization in which you would like to create the class.

Classes +

Organization | Eastern | ▼ |

No data to disp

▼ **Eastern**

  ▼ East-Chattanooga

       East TN College

       Education Center

  ▶ East-East

  ▶ East-North

  ▶ East-South

  ▶ East-West

       Eastern Tech Center

       Roane District

  ▶ Western

Then, select the plus icon to create a new class in that organization.

This will open the Create Class screen:

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

Note: The class name must be unique within the organization. Ideas to ensure uniqueness are: 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:

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Reset by Date allows you to designate a date in the future at which time the class roster will be automatically cleared of all learners so that you can add new learners to the class.

You will still be able to run reports for that class after it has been reset by going to Class Reports and selecting the date range during which that class roster was active.

Assigning Facilitators

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

Facilitators	Bethany Bridges	⊗	▾

			🔍 Search...
☑	Last	First	Email
☐	Jackson	Samuel	sjackson@yahoo.com
☑	Bridges	Bethany	bbridges@easttn.edu

Class Roster

First

Save Changes

Assigning Learners

After your class is created, you may assign learners. Go to the **Class Assignment** tab, which becomes visible after the class is created.

Edit Class | **Class Assignment**

You will be presented with the **Learner Pool** on the left, which displays all learners in your organization who you are permitted to add to your roster. On the right is your empty **Class Roster**.

Learner Pool — **2019 Mrs. B Period 2 Math**

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

Right grid: First | Last ↑ | Email | Date of Birth — No data

Add To Roster — Page 1 of 2 (17 items) 1 2

Remove From Roster — Page 1 of 1 (0 items) 1

Column Chooser

By default, the grid displays the columns: First name, Last name, Email, and if available, Date of Birth for each learner. You can add columns with additional learner data by selecting the **Column Chooser.** For example, you may want to see the unique identifier, grade level, or last active date for the learners in your list. *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 you would like displayed in the grid.
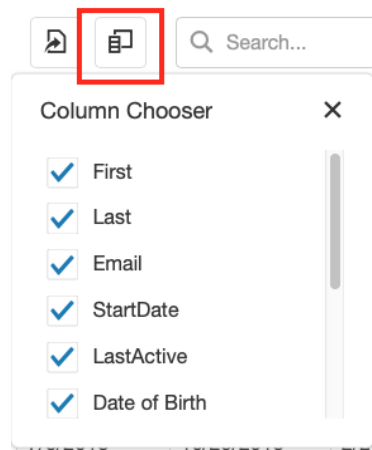
In the example above, I added StartDate and LastActive, which adds those columns to my grid.

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 get all learners tagged with Grade Level 9.

	First	Last ↑	Email	Date of Birth	Grade Level
☐	Yahoo	Gmail	yahoo@gmail.com	7/1/2018	9
☐	Maxwell	Jackson	mjackson@yahoo.com	5/1/2000	9
☐	Joseph	Jackson	jjackson@yahoo.com	12/25/1920	9
☐	Victor	Jackson	vjackson@yahoo.com	2/26/2000	9

You can **Sort** columns by clicking on the column header you wish to sort. The data will sort in ascending or descending order. In the example below, I have sorted the First Name column 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 of the columns. You can also resize columns by selecting and adjusting the horizontal grid line between columns, just like you would in a spreadsheet.

By using the **column filters**, you can further narrow down your Learner Pool list to more easily find the learners you want to add to your class roster.

Previously, I added Last Active to the grid. Now I can filter by learners who were Last Active by or within a certain date range by clicking the funnel in the LastActive column header. This opens a selection box where I can select the date(s).

Select **OK** and you get a filtered list of learners who were last active 2019. You can see that column filter is active because it is 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

Here's another example. Let's say you want to make a class of ninth graders. You can filter by Grade Level 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…Remove from Roster

Once you have narrowed the Learner Pool to a reasonable list, you can build your roster by selecting the green check mark next to each learner you want to add to the roster. You can select all by clicking the green check mark at the very top left, that is inline with the column headers.

Note: You do not have to narrow your Learner Pool down at all in order to select learners to add to your roster. You can scroll through the list as you wish and select the learners.

Once you have selected the learners, 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

Learner Pool   2019 Mrs. B Period 2 Math

☐	First	Last ↑	Email	Date of Birth ▼	Grade Level ▼

<div align="center">No data</div>

☑	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

Add To Roster   Page 1 of 1 (0 items) 1

Remove From Roster   Page 1 of 1 (4 items) 1

Save Changes

The learners you 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 you have made a mistake and want to remove them before saving changes. Click **Remove From Roster** to remove those, or any learners. Once you click **Save Changes**, the red check marks will disappear and your roster will be saved.

You can always remove learners by selecting the red check mark next to the learner's name and then Remove From Roster. You can always come back and add new learners to the roster by selecting learners from the Learner Pool and then selecting Add to Roster.

Note: You may still have learners in the Learner Pool grid if you have not moved them all over to the roster. Be sure to undo any filters you may have applied if you want to see other learners.

Class Roster Preview
Now that you have created a class roster, when you navigate back to the **Edit Class** tab, that roster will be displayed in the **Class Roster Preview** grid.

You can 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 you are an administrator of more than one organization, 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, you can edit the class name, the reset date, and the facilitators. Make your changes and click Save Changes.

On the Class Assignment screen, you can edit the roster of learners in the class. Here you add or remove learners from the class roster using the steps outlined above.

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 you wish to export using the Column Chooser.
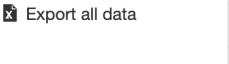Then select the Export icon in the top right corner of the grid.

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Select Export all data.
This will export all data in the columns selected, even if it spans multiple pages.

Class Roster Preview

Excel:

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

Known Issues

Inconsistent Data:
Each filter will display the data that is in the system for that organization. If the data were inconsistently input, they will be inconsistent in the filter list. When learners are enrolled individually in WINCRSystem, many of the fields have drop downs to enforce consistency. In batch enrollment, however, data validation has not always been enforced. While we continue to improve that, there could be historic data that is inconsistent.

Here are some examples:

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The standard field for Gender should be: male, female.
There are instances of Male, Female, M, F, m, f in the data.

The standard field for Grade Level should be: 5, 6, 7, 8, 9, 10, 11, 12, Graduated, Adult Ed, Workforce, Other.
There are instances of ?10, ?11, 11' in the data.