

ClassMate *for* Adult Education

System Administrator



STUDENT INFORMATION | FINANCIAL MANAGEMENT | SCHOOL NUTRITION

System Administrator

System Administrator

The system administrator plays one of the most active roles in the ClassMate system. The System Administrator category and related modules are very powerful and drive much of the functionality within the system. Each school should have a system administrator identified. The system administrator will learn all ClassMate functionality. The modules in this category should be assigned on a limited basis to qualified users only.

What we'll Learn.....

Access

- First Time Access
- Back Again
- Desktop Shortcuts

User Management

- Employee Management
- User Management
 - Username
 - Password
 - Employee Linkage
 - Location Default
- User Groups
 - Creating New Groups
 - Assigning Users to Existing Groups
- Module Assignment
 - Module & Report Assignment
 - Module & Report Removal

Customization Management

- Misc. Tab
- System Defaults
- Attendance
- Grading
- Rubrics
- Unit Grading
- Payments

Email Notification Setup

- Registration
 - Student Registration Tab



System Administrator

First Time Access

- Open an Internet Browser
- Enter URL provided to you by ClassMate

<http://www.classlink.com/sites/schoolacronymadulded>

- Click **First Time Setup**
- Select the operating System and download the client
- Perform installation steps
- Once installation is complete Click **Connect to Launch ClassMate**
- When the ClassMate login window appears enter our username & password to sign in



System Administrator

Return Access

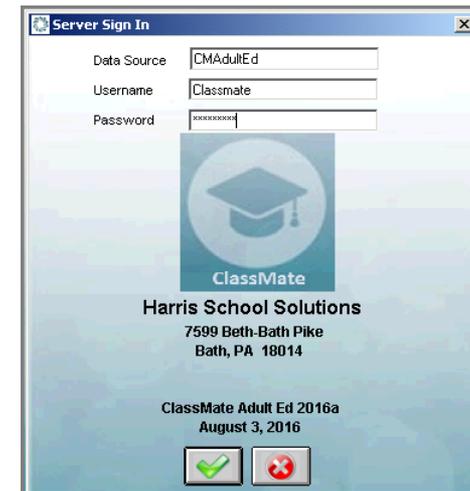
- Open an Internet Browser
- Enter URL provided to you by ClassMate

<http://www.classlink.com/sites/schoolacronymadulded>

- Click **Back Again**
- When the ClassMate login window appears enter our username & password to sign in



Note: First Time Setup will be used each time a users attempts to access ClassMate for a computer that has never accessed the site before.



System Administrator

Creating a Desktop Shortcut

- Right click on any empty space on the desktop
- The context menu will display. Highlight **New** then **Shortcut** on the pop up
- The create shortcut pop-up appears, with a window labeled, **Type the location of the item**
- Enter the following:

ClassMate

ClassMate for Adult Ed:

<http://www.classlink.com/sites/acronymadulted/desktop.ica>

LaunchPad

<http://www.classlink.com/sites/acronym/desktop.ica>

- Click **Next** at the bottom of the pop-up
- Enter either **CM for Adult Ed** or **LaunchPad** as appropriate
- Click **Finish** at the bottom of the pop-up. The new shortcut will display on your Windows desktop

Note: All users will need access to ClassMate. Only the System Administrator and a select few will need access to LaunchPad.



System Administrator

Adding a New User

When adding a new employee to the system a series of steps must be completed to ensure the user can login and access appropriate modules/reports as expected. To begin you must create an employee record. This record will be linked to the user name

Getting Started

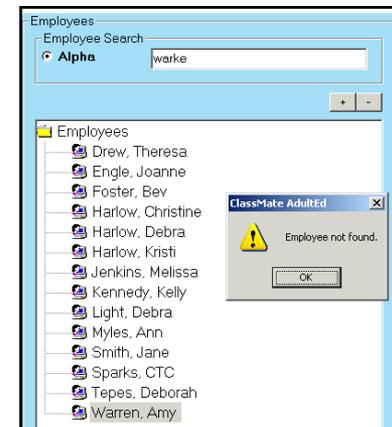
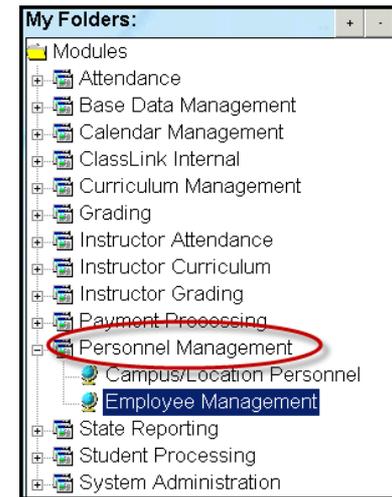
Double click > **Modules** > Double Click

Personnel Management > Click **Employee Management**

Prior to entering a new employee, check the existing list to ensure you are not creating a duplicate entry

Enter the last name of the new employee in **Employee Search Field**

If the employee is NOT in the database, you will then create the new employee



NOTE: To open Modules or Sub-Modules, click on the Module's Title or the plus sign (+) to the left of the Title.



System Administrator

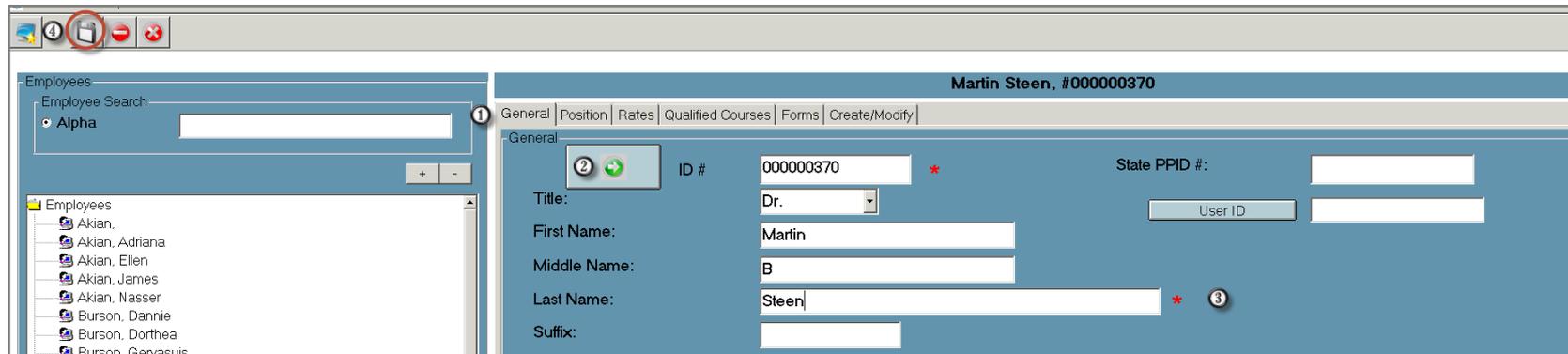
Adding a New User

Create Employee-General Tab

Double click > **Modules** > Double Click

Personnel Management > Click **Employee Management**

- 1 Select the **General Tab** and complete all fields with a **RED** asterisk (*). These fields are mandatory and must be completed so the record can be saved. All additional fields are optional based on your state reporting requirements
- 2 Select the **BLUE** button with the **Green** arrow to create the next available unique ID
- 3 Populate any remaining fields
- 4 Select the **BLACK** disk icon to save the employee record



System Administrator

Adding a New User

The General Tab has only 2 (**Employee ID and Last Name**) mandatory fields required to save the employee record. However, state reporting requirements may require additional fields. Check with your school administration to ensure all required information is entered into Classmate as needed. This would include any additional tabs in this module. The optional tabs include:

Field Name	Description
Position	Tracks employee department, hire date, status, job title, etc.
Rates	Tracks employee hourly rate
Qualified Course	Tracks courses the employee is qualified to instruct
Forms	Tracks all forms required for employees. This functionality must be setup prior to recording the forms have been received.
Create/Modify	Records the initial employee create user/date and modified user/date

Note: Maintaining data in a centralized database allows users the convenience of one location to maintain data.



System Administrator

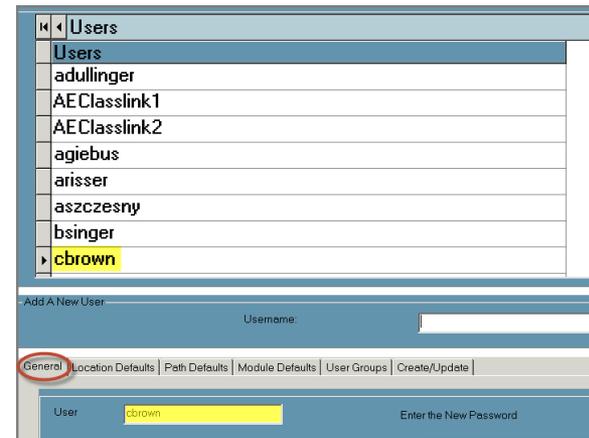
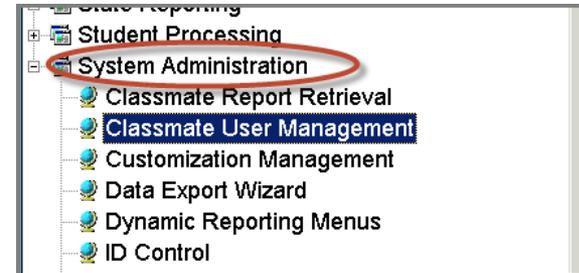
Adding a New User

After the employee record has been created, an employee requiring access to ClassMate must have a unique username and password created to securely sign into ClassMate

Getting Started

Double Click **My Modules**>Double Click **System Administrator**>Click **ClassMate User Management**

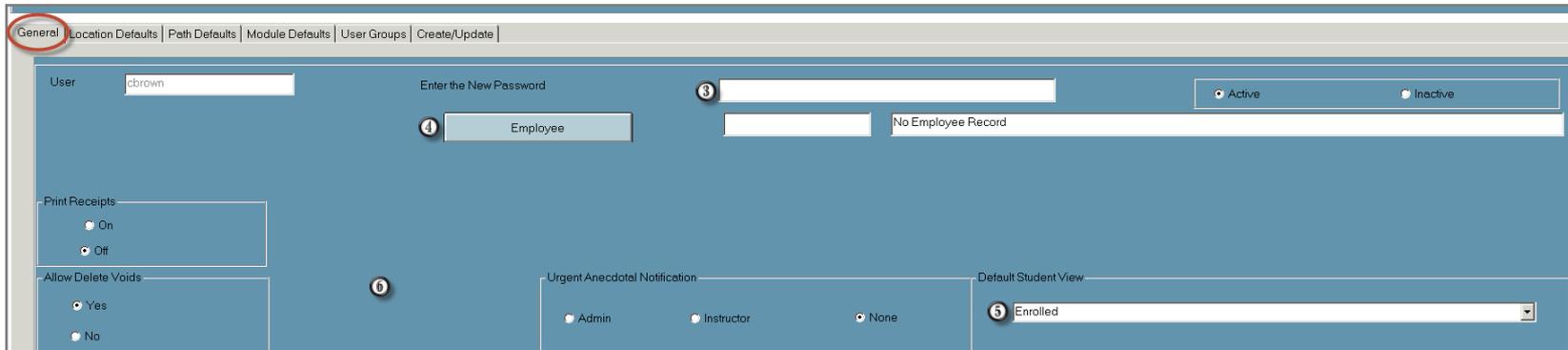
- 1 In the **Add a New User** portion enter the desired **Username** in the field. Keep in mind usernames should be standardized and unique.
- 2 Select the **BLUE** add to save and add the username to the grid. The newly entered username will be highlighted in **General Tab**



System Administrator

Adding a New User

- 3 Enter a **Password**. Often this is a generic password that the user will change later to a secure one after initial login
- 4 Select the **Blue Employee** button to find the user employee record (must be previously created) to link the username with the employee
- 5 Select a default **Student View** from the dropdown menu. Select the group of students the user will most often be working with in the system. This is simply a filter in the modules
- 6 Review and adjust as required the **Print Receipts**, **Allow Delete Voids** and **Urgent Anecdotal** default to ensure the user will have the ability to perform actions that may be required by their role in the system
- 7 Select the **BLACK** disk icon to **Save** the record



The screenshot shows a web-based form for creating a new user. The form is titled "Create/Update" and has several tabs: "General", "Location Defaults", "Path Defaults", "Module Defaults", and "User Groups". The "General" tab is selected. The form contains the following fields and options:

- User:** A text input field containing "cbrown".
- Enter the New Password:** A text input field with a callout "3" next to it.
- Employee:** A button labeled "Employee" with a callout "4" next to it.
- Print Receipts:** Radio buttons for "On" and "Off".
- Allow Delete Voids:** Radio buttons for "Yes" and "No".
- Urgent Anecdotal Notification:** Radio buttons for "Admin", "Instructor", and "None".
- Default Student View:** A dropdown menu with "Enrolled" selected and a callout "5" next to it.
- Active/Inactive:** Radio buttons for "Active" and "Inactive".

Callout "6" points to the "Urgent Anecdotal Notification" section, and callout "7" points to the "Save" button (represented by a black disk icon) at the bottom right of the form.

Note: User System defaults are established in Customization Management module for password change, period, fully funded, 1098T, PIMS Summation & Portal Access.

System Administrator

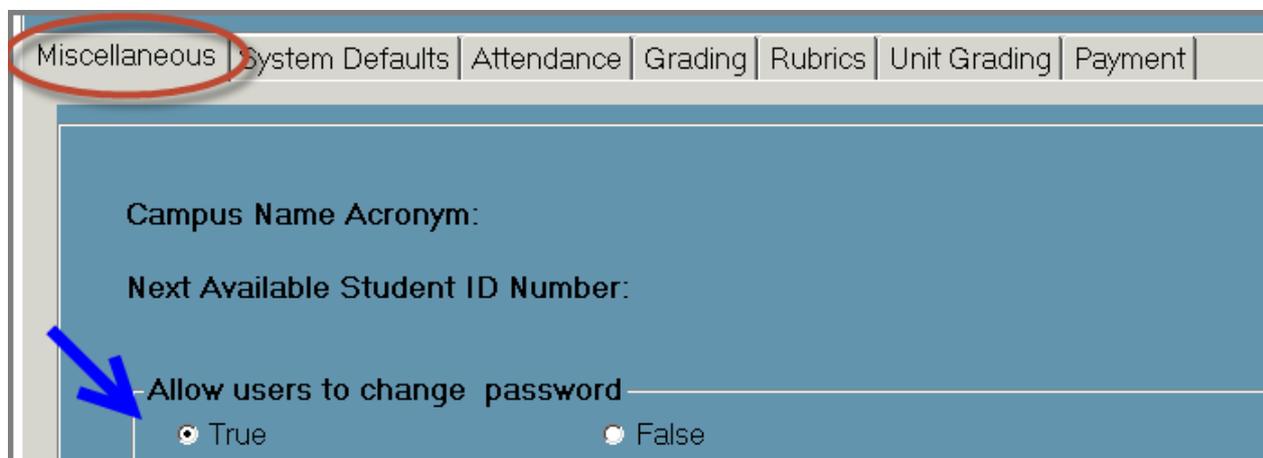
Helpful Hints:

Username & Passwords

Each school will have a standardized naming convention and protocols for creating usernames and passwords. It is a best practice to create the usernames and passwords in accordance with your school policy.

Once a password has been established for a user (generally this is a generic password assigned to all users), it is a ClassMate best practice to walk the users through changing their password the first time they login. This will allow them to create a secure password.

ClassMate gives system administrators the option to allow users to change their password at any time and keeping the functionality available or turning off the feature and managing password changes at the system administrator level. This feature is turned on and off in the **Customization Module**.



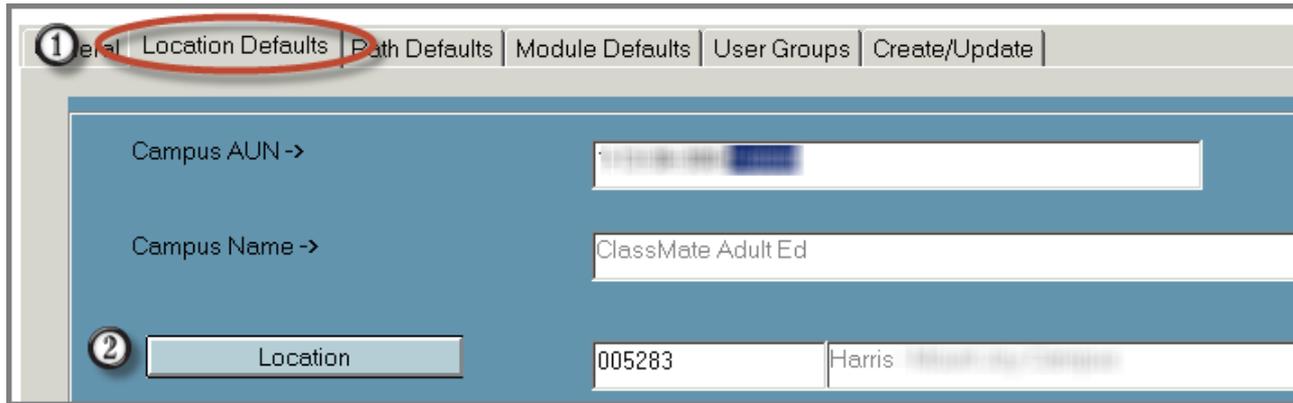
System Administrator

Adding a New User

Create Employee-Location Tab

This is a **Mandatory** field. The location default tab will allow the system administrator to identify a default location for the user and is used by the ClassMate system in a variety of ways. Users must have a default location identified in the system so the user can view and utilize functionality specific location to their location. Even if you only have 1 location you must ensure the location default is set in this tab

- 1 Select the **General Tab**
- 2 Select the **BLUE Location Defaults Tab**. Select the location from the listing even if there is only one. Once selected, the Campus AUN and campus name will display along with the location
- 3 Select the **BLACK** disk icon to save the employee record

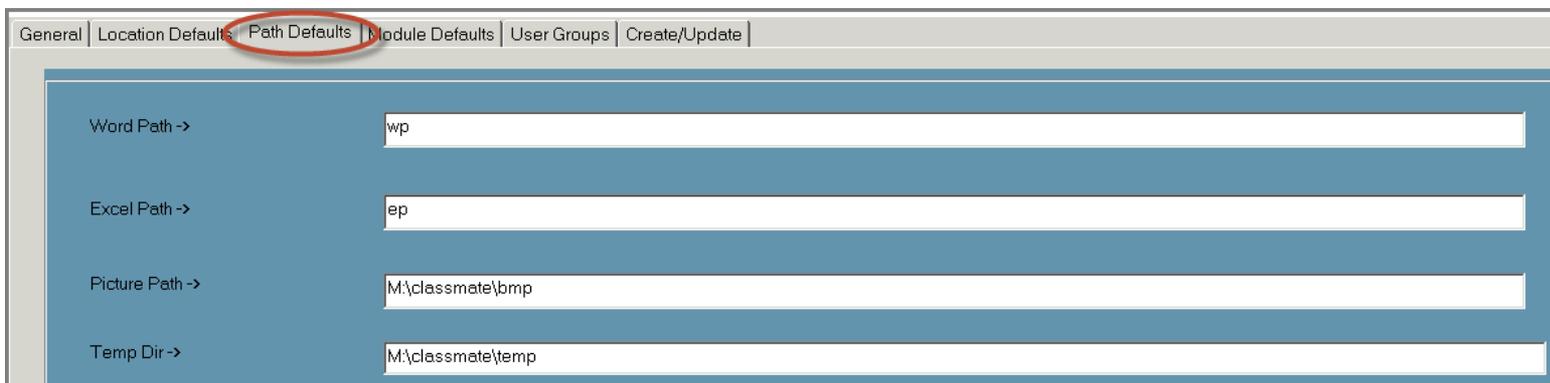


System Administrator

Adding a New User

Create Employee- Path Default Tab

The **Path Defaults** tab allows the system administrator to identify default file pathways for Word, Excel, photos and a temp directory. The defaults are setup by the ClassMate engineers when creating your database and should only be adjusted if advised to do so.



Field	Value
Word Path ->	wp
Excel Path ->	ep
Picture Path ->	M:\classmate\bmp
Temp Dir ->	M:\classmate\temp

Note: System defaults are established in Customization Management module.

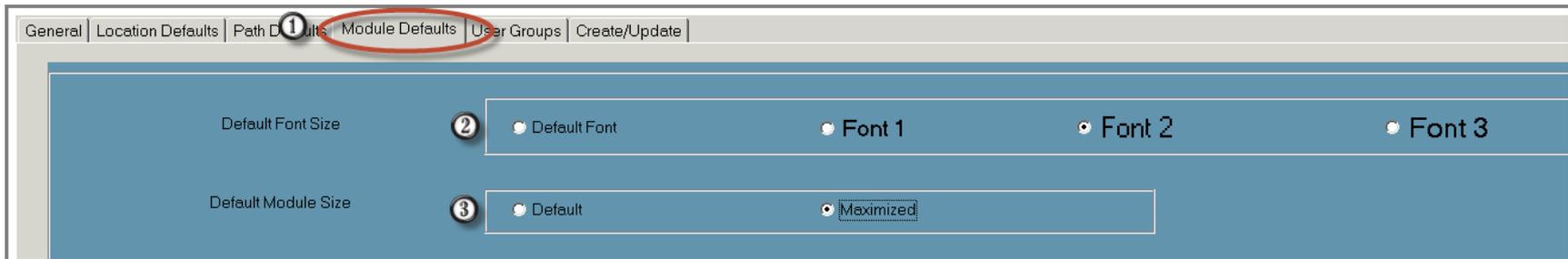


System Administrator

Adding a New User

Create Employee- Module Default Tab

The **Module Defaults** tab allows the system administrator to adjust the default view for users. System Administrators may need to use trial and error to determine the best default for your environment. Font 2 and Maximized are often best default font and module size.



Users can also individually adjust their own user defaults by selecting the Smiley Face icon located along the top of the screen



System Administrator

Adding a New User

Create Employee- User Groups Tab

The **User Group** functionality in ClassMate allows users to only see the modules and reports needed to do their job. The ability to customize what the user sees is controlled by the System Administrator. In an effort to maximize efficiency, ClassMate encourages System Administrators to create user groups which will hold users with similar job functions together as a group so reports and modules can be assigned quickly and easily. Often, users in a school need to see the same set of modules/reports, for example Instructors, would all have the same modules/reports. By creating a user group called “Teachers” you can quickly and easily add all teachers to the group and then assign modules/reports in bulk rather than by individual user.

Step 1 is to create the Users Groups (you will only do this in the **User Group Processing Module**) then add users to the group from either the User Groups Tab in ClassMate User Management or the User Group Processing module.



System Administrator

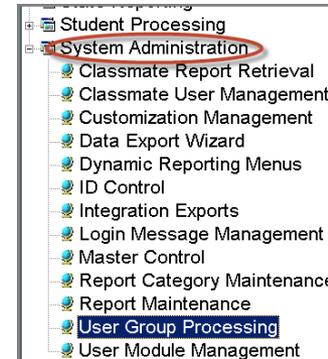
Adding a New User

Creating User Groups

User groups allow for quick and easy module/report assignment. This is commonly setup at the beginning of an implementation.

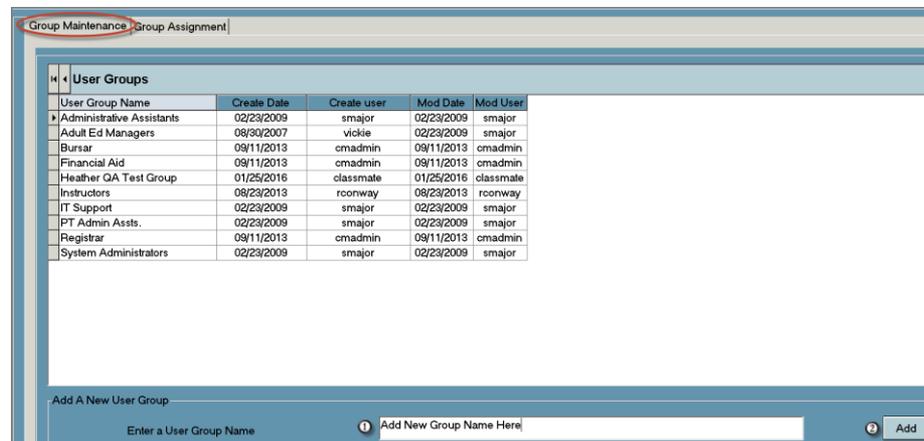
Getting Started

Double Click **My Modules**>Double Click **System Administrator**>Click **User Group Processing**



1 Ensure the **Group Maintenance Tab** has been selected
In the **Enter a New Group Name** type the desired name of the group

2 Select the **BLUE ADD** button to save and add the user group to the grid. The newly entered group will now be available for use in this module as well as ClassMate User Management



System Administrator

Adding a New User

Create User Groups-Adding users to the group via User Group Processing

After the **User Group** has been created users can then be assigned to the group. From the User Group Processing module follow the steps below

Getting Started

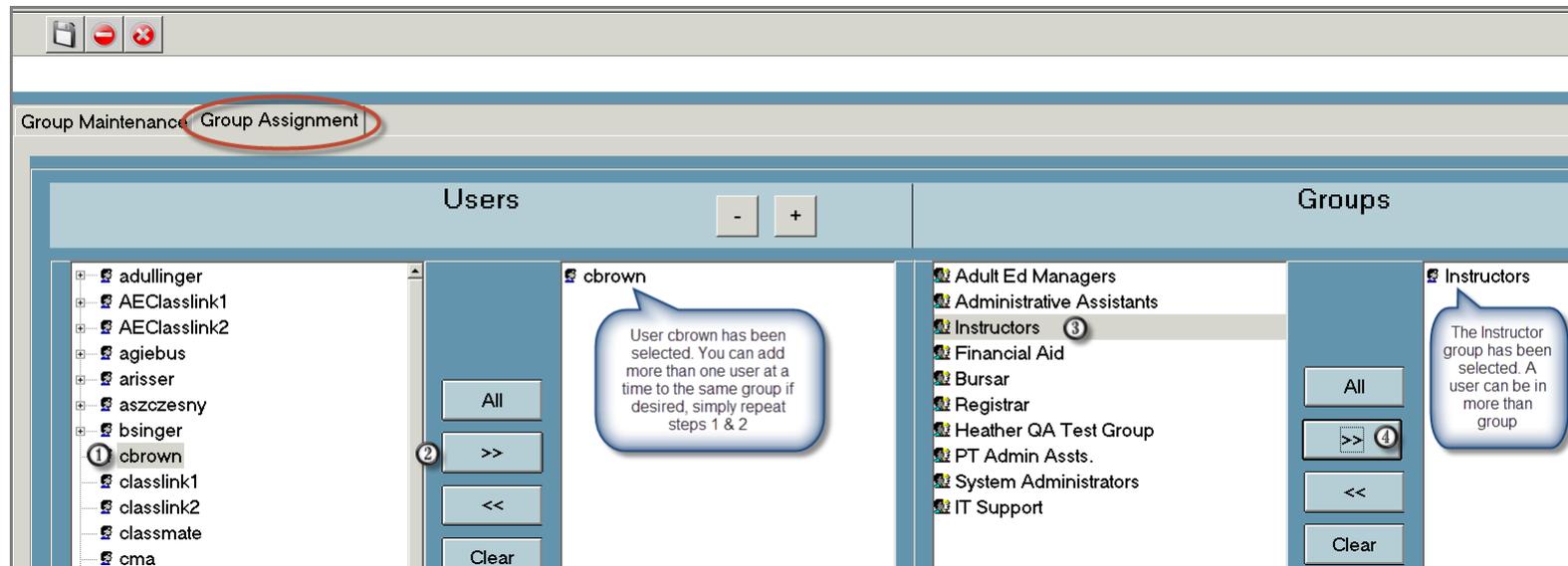
Double Click **My Modules**>Double Click

System Administrator>Click **User Group Processing**

1 Ensure the Group Assignment Tab has been selected

Select the **User Name**

2 Select the >> button to add the user to the selected window



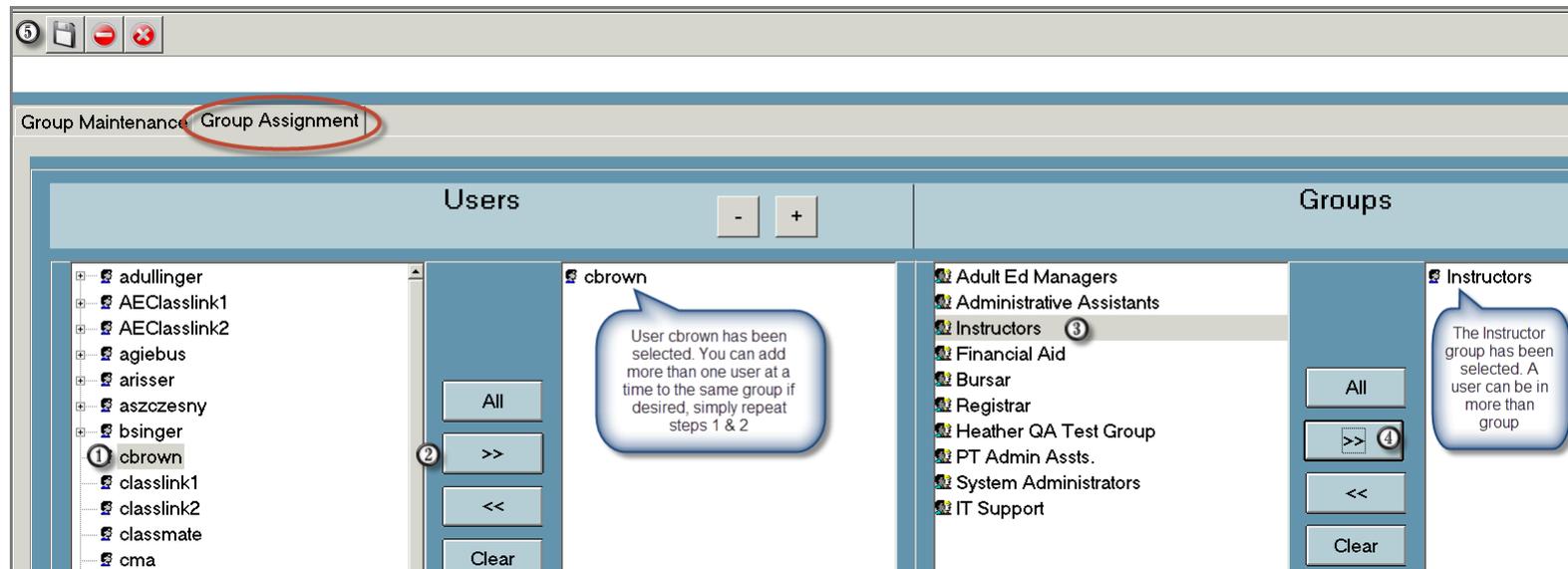
The screenshot shows the 'Group Assignment' tab in the 'Group Maintenance' module. The interface is split into two main sections: 'Users' and 'Groups'. In the 'Users' section, a list of users is shown on the left, with 'cbrown' selected and circled in red. A callout bubble next to 'cbrown' says: 'User cbrown has been selected. You can add more than one user at a time to the same group if desired, simply repeat steps 1 & 2'. A red circle with the number '2' highlights the '>>' button. In the 'Groups' section, a list of groups is shown on the left, with 'Instructors' selected and circled in red. A callout bubble next to 'Instructors' says: 'The Instructor group has been selected. A user can be in more than one group'. A red circle with the number '4' highlights the '>>' button. The interface also includes 'All', '<<', and 'Clear' buttons for both sections.



System Administrator

Adding a New User

- 3 Ensure the **Group Assignment Tab** has been selected
Select the **User Group** you would like the user to be a member
- 4 Select the **>>** button to add the user to the group. The selected **Group Name** will display in the selected window
- 5 Select the **BLACK** disk icon to **Save** the group processing. A message will displaying confirming group assignments have been made.



Note: Use the **Clear** button or **<<** to remove a selection prior to saving. Clear will remove **ALL** selections. **<<** will remove only a **Single** selection

System Administrator

Adding a New User

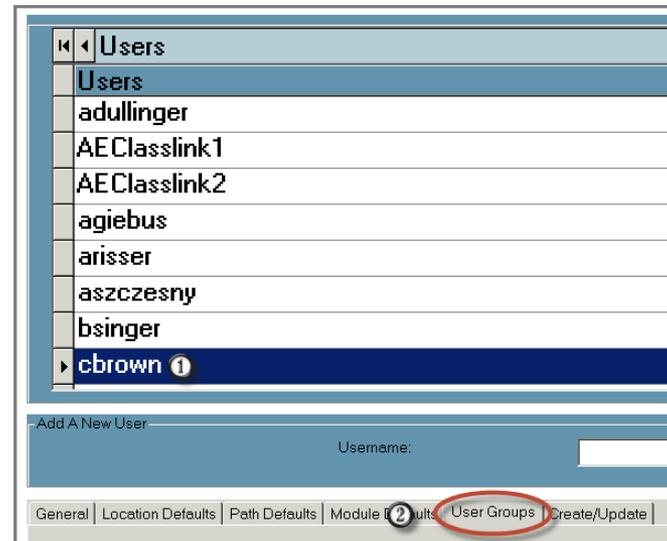
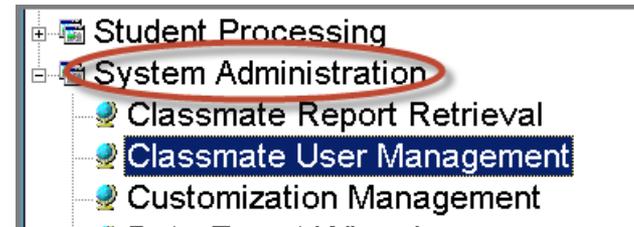
Adding users to a Group via ClassMate User Management

A **User Group** **MUST** be created prior to adding users. Add users to groups via the Classmate User Management module by following the steps below

Getting Started

Double Click **My Modules**>Double Click **System Administrator**>Click **ClassMate User Management**

- 1 Select the **User Name** from the user listing
- 2 Select the **User Groups** Tab

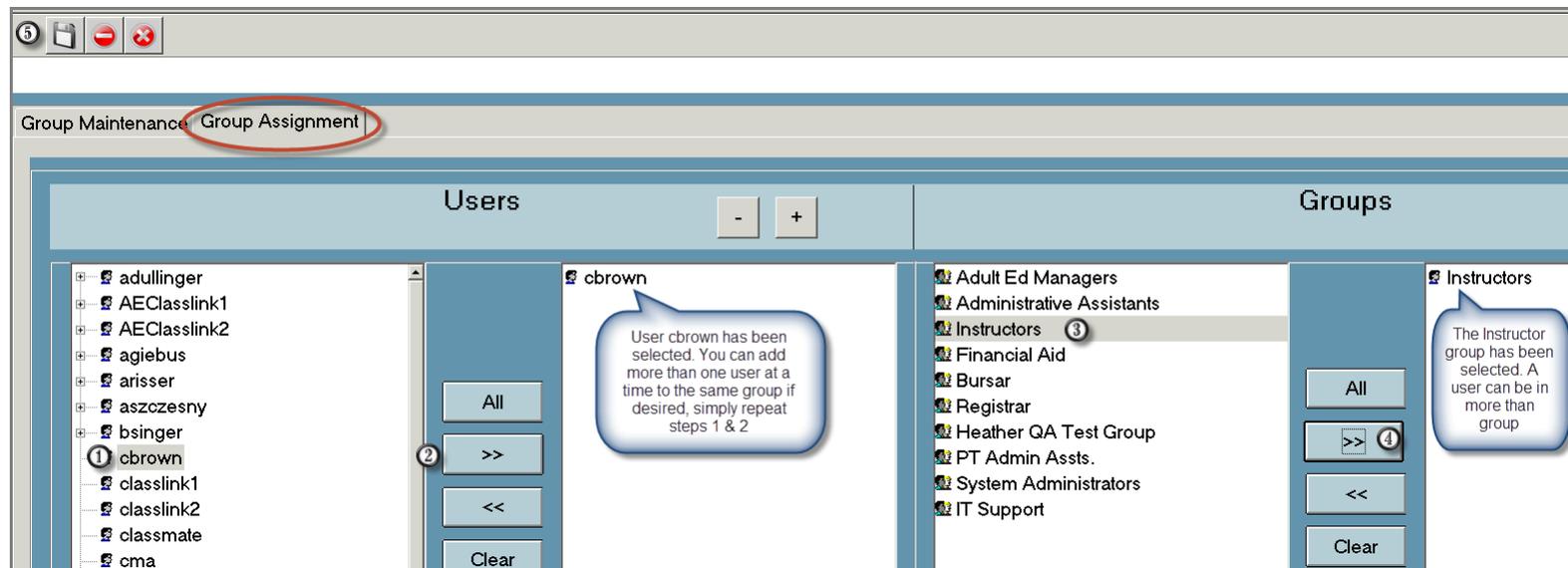


System Administrator

Adding a New User

Adding users to a Group via ClassMate User Management

- 3 Select the **Group Name**
- 4 Select the >> button to add the user to the group. The selected **Group Name** will display in the selected window
- 5 Select the **BLACK** disk icon to **Save** the group processing. A message will displaying confirming group assignments have been made.



System Administrator

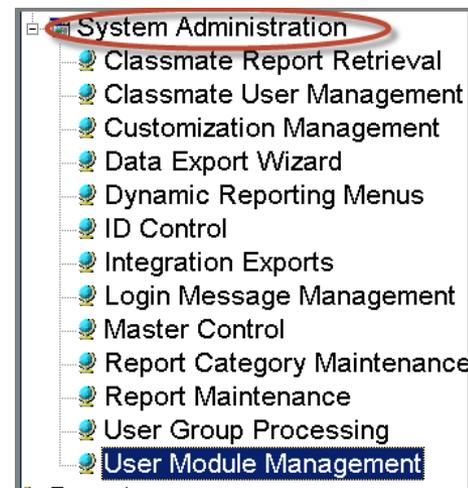
Assigning Modules and Reports

ClassMate functionality allows users to only see the modules and reports needed to do their job. The ability to customize what the user sees is controlled by the System Administrator. Assigning the correct and appropriate modules/reports to the correct users and/or groups is a key aspect of maintaining the ClassMate system.

It is vital to have an approval process in place to determine which staff should receive certain modules. It is a ClassMate best practice to receive approval from Administration before assigning a module to a group or an individual. Assign only what is needed to a group or individual. A yearly review of assigned modules and reports by the system administrator is recommended

Getting Started

Double Click **My Modules**>Double Click **System Administrator**>Click **User Module Management**



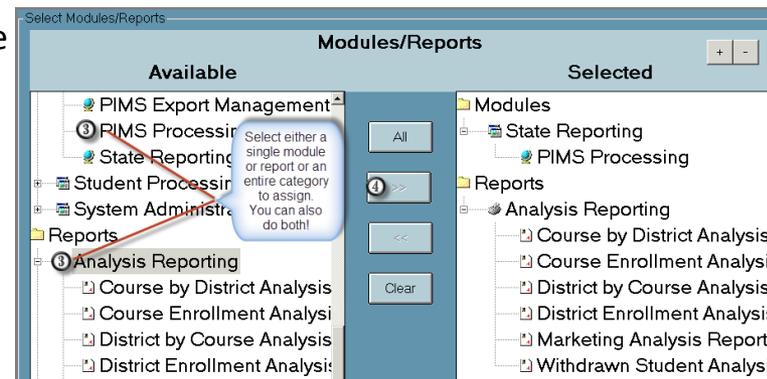
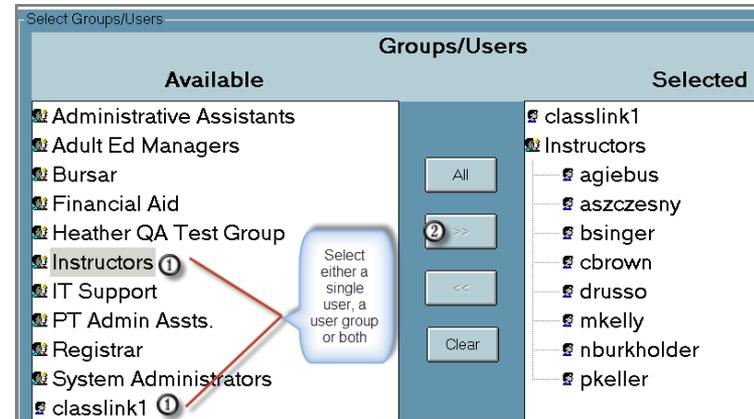
Note: To view assigned items, simply right click on a user name or group to view module & report assignments



System Administrator

Assigning Modules and Reports

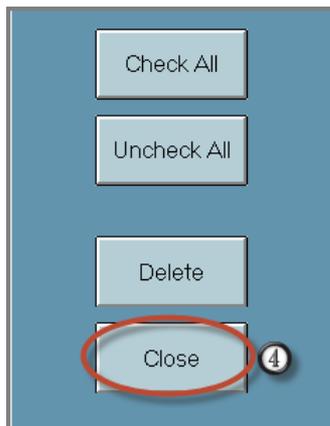
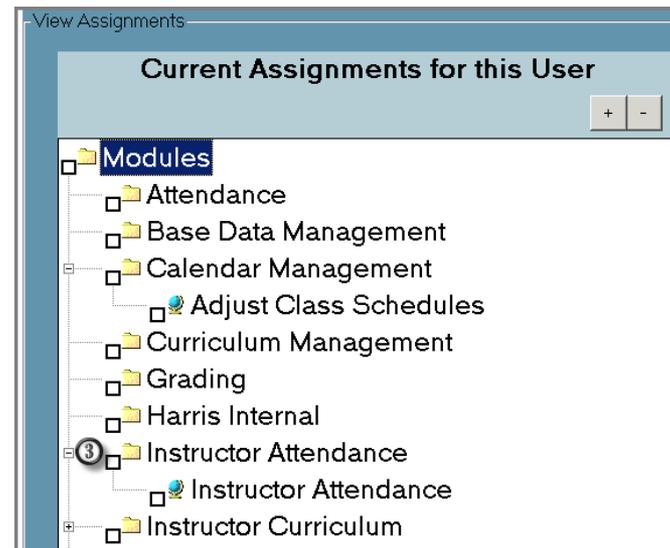
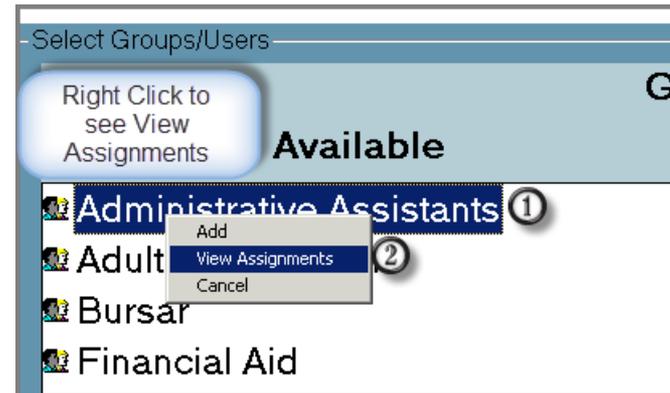
- 1 Select the **Single User or Group Name** from the Available window. If a group is selected **ALL** users assigned to that group will be assigned the selected modules & Reports
- 2 Select the >> button to display the user/group selection in the **Selected** window
- 3 Select a single report/module or an entire category. If a category is selected **ALL** modules/reports listed will be assigned
- 4 Select the >> button to display the report/module selection in the **Selected** window
- 5 Select the **BLACK** disk icon to **Save** the group processing. A message will displaying confirming group assignments have been made.



System Administrator

Viewing Module and Report Assignments

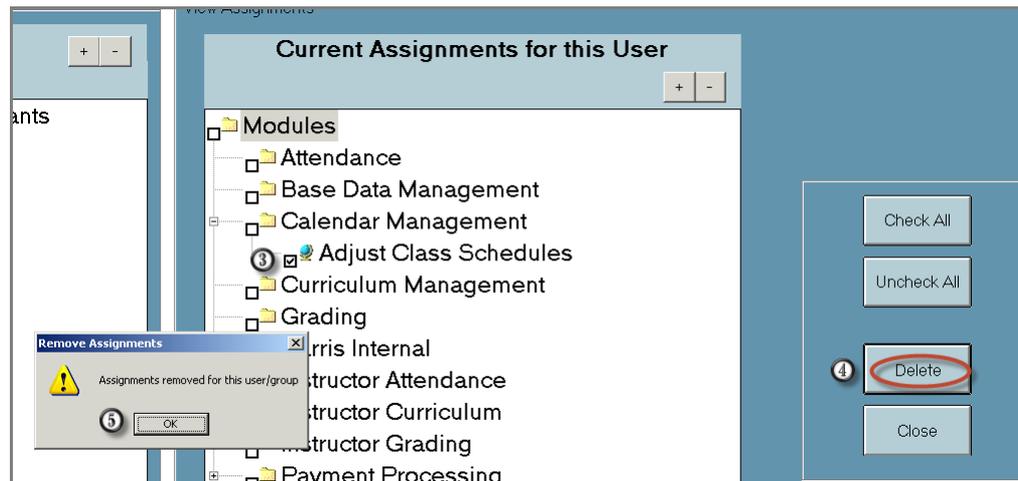
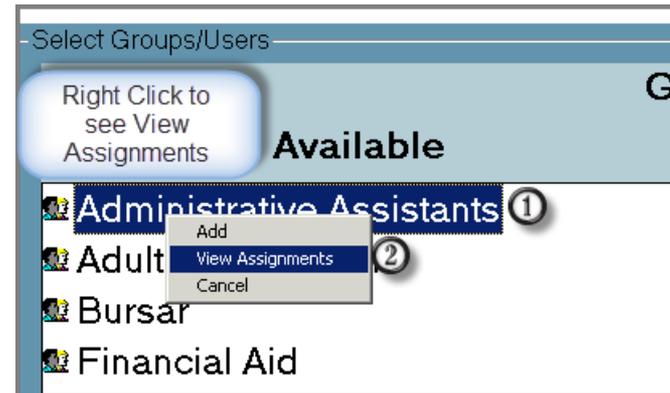
- ① Select a **Single User or Group Name** from the available window. Right click on the **Name**
- ② Select the **View Assignments** button allow the View assignments window to display
- ③ Select a module or report category with a **+ sign** to the left to view assignment. The **+ sign** indicates modules or reports under that category have been assigned. Those with no **+ sign** do NOT have any assignments.
- ④ Select the **Close** button to exit the assignment view



System Administrator

Removing Module and Report Assignments

- 1 Select a **Single User** from the available window. Right click on the **Name**
- 2 Select the **View Assignments** button to allow the **View Assignments** window to display
- 3 Select a the module or reports you would like to remove from the single user view by placing a check mark in the box to the left
- 4 Select the **Delete** button. The **Delete** icon can also be used
- 5 Select **OK** to remove the module or report assignment(s)



System Administrator

Customization Management

ClassMate functionality allows users to establish both system and user defaults globally throughout the database. These settings are often associated with specific functionality and will be described and setup in greater detail as the functionality is implemented.

It is vital to have a general understanding of the system default and the impacts of making these selections. Additional System Administrator modules will be addressed in function specific quick reference guides.

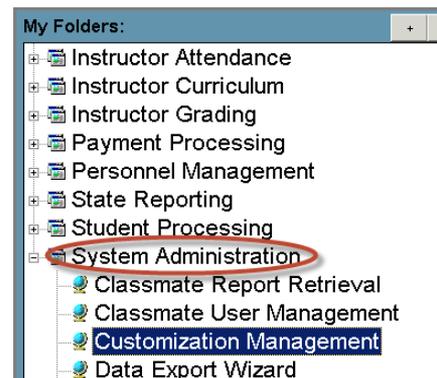
Additional system administrator modules include:

- Data Export Wizard
- ID Control
- Login Message Management
- Master Control

Getting Started

Double Click **My Modules**>Double Click

System Administrator>Click **Customization Management**



Note: To view assigned items, simply right click on a user name or run any of the module assignment reports



System Administrator

Customization Management

The Customization Management module has the following tabs:

Field Name	Description
Misc. Tab	Establishes the following: Campus Acronym, next available student ID #, password change, messaging, class schedule setting, student balance color display, Student Fee Dates, sales tax, archive & email notifications
System Defaults	Period sort order default, fully funded student default, 1098T student default, PIMS summation default & portal default
Attendance	Attendance lock-out setting
Grading	Calculated grade method setting, maximum grade standard or rubric range & certificate requirements including attendance/grade thresholds
Rubrics	Grade rubric entry
Unit Grading	Lab task threshold, clinical task threshold, passing grade threshold, weighted units flag, grading retake flag, include decimal in theory grade flag & passing hours threshold
Payment	Next available receipt number, next available payment number, next available transfer number, next available refund number, next available credit number, next available void number & employer billing setting.



System Administrator

Email Notification Setup: Enabling the Functionality

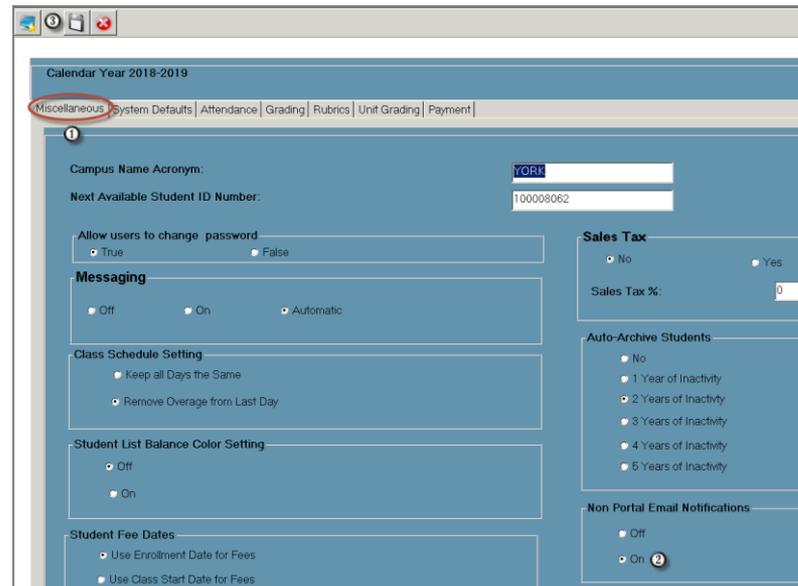
ClassMate has automated email notification for student registration. When a student is manually registered in a class, the system will send an email to the student using one of the email addresses identified and attached to the student demographic information. This functionality must be enabled and an email template established prior to use.

Getting Started

Double Click **My Modules**>Double Click **System Administrator**>Click **Customization Management**>



- 1 Select the Miscellaneous Tab
- 2 Enable email notification functionality by selecting the **On** Radio button
- 3 Select the **Save** Icon



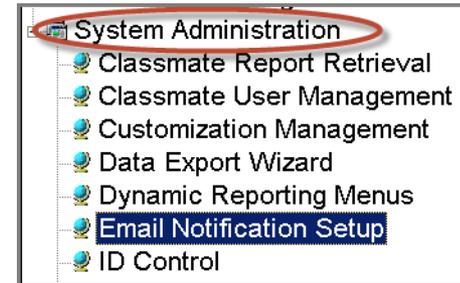
System Administrator

Email Notification Setup: Email Template

Getting Started

Double Click **My Modules**>Double Click

System Administrator>Click **Email Notification Setup**



Email Notification Setup: Email Template

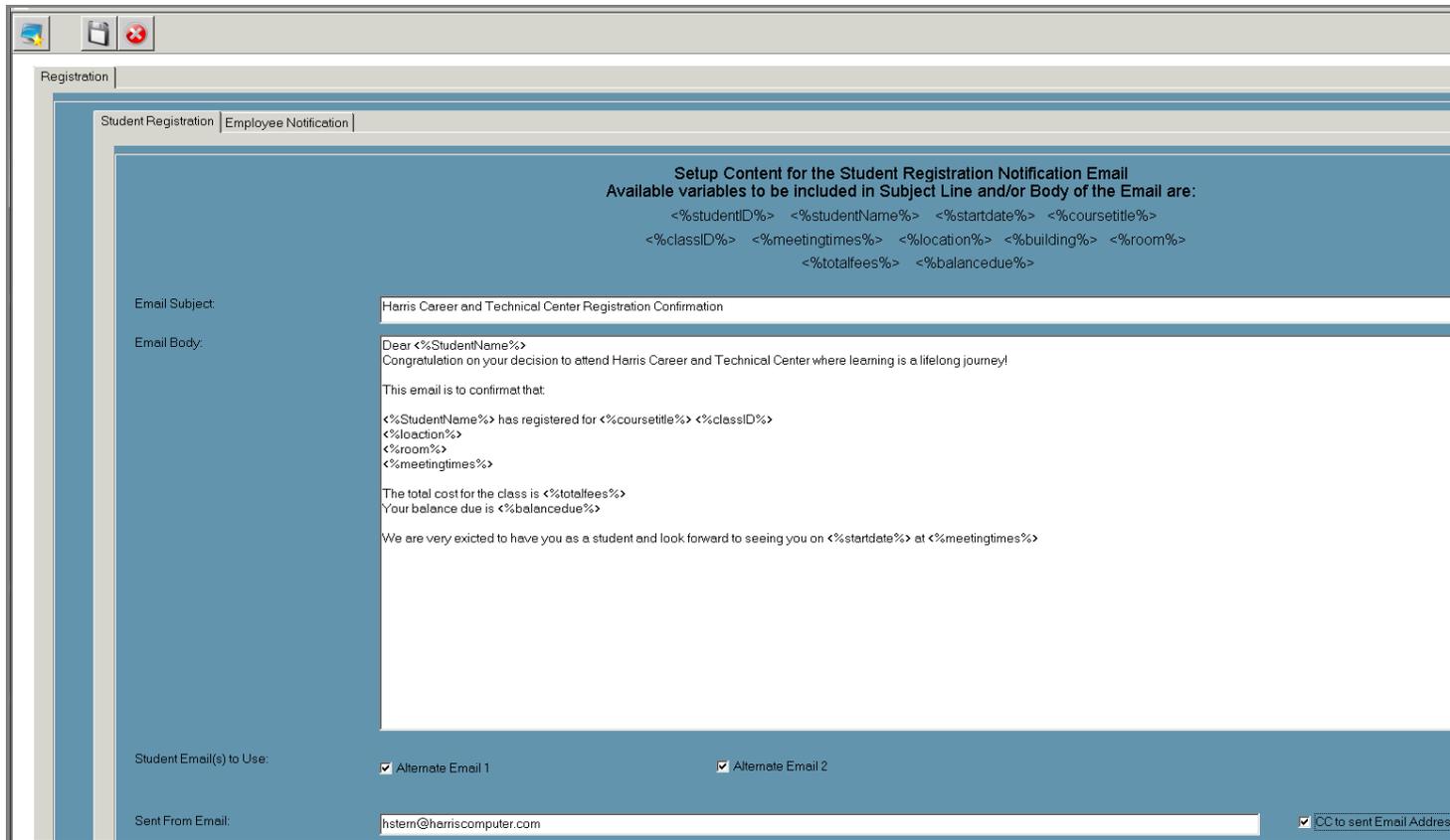
The email template has the following fields that must be populated prior to using the functionality:

Field Name	Description
Email Subject	Enter the email subject in the field
Email Body	Using the available variables create an email body that will be sent to students. There is only 1 email template that will be sent to all students regardless of the course they are registering for
Student Emails to use	Select which email address you would like to use to email the student
Sent From email	Enter the email address you would like the email to be sent from
CC to sent email address	Select this option if you would like the sent from email address to receive a copy of the student email



System Administrator

Email Notification Setup: Email Template



The screenshot shows a web-based interface for setting up an email template. At the top, there are tabs for "Registration" and "Employee Notification", with "Registration" selected. Below the tabs, there is a section titled "Setup Content for the Student Registration Notification Email" with a sub-heading "Available variables to be included in Subject Line and/or Body of the Email are:". The variables listed are: <%studentID%>, <%studentName%>, <%startdate%>, <%coursetitle%>, <%classID%>, <%meetingtimes%>, <%location%>, <%building%>, <%room%>, <%totalfees%>, and <%balance%>.

The "Email Subject:" field contains the text "Harris Career and Technical Center Registration Confirmation".

The "Email Body:" field contains the following text:
Dear <%StudentName%>
Congratulation on your decision to attend Harris Career and Technical Center where learning is a lifelong journey!

This email is to confirm that:

<%StudentName%> has registered for <%coursetitle%> <%classID%>
<%location%>
<%room%>
<%meetingtimes%>

The total cost for the class is <%totalfees%>
Your balance due is <%balance%>

We are very excited to have you as a student and look forward to seeing you on <%startdate%> at <%meetingtimes%>

The "Student Email(s) to Use:" section has two checked checkboxes: "Alternate Email 1" and "Alternate Email 2".

The "Sent From Email:" field contains the text "hstern@harriscomputer.com".

At the bottom right of the form, there is a checkbox labeled "CC to sent Email Address" which is also checked.



ClassMate *for* Adult Education

1660 Valley Center Parkway
Suite 500
Bethlehem, PA 18017

Need Assistance? Give us a call.
855-984-1228 Help Desk: Option 1

www.classmate.net
<http://harrisschoolsolutions.com/>

