

ClassMate *for* Adult Education

Student Portal: Administrators Guide



Student Portal: Administrators Guide

Student Portal Overview

The ClassMate for Adult Education Student Portal provides students the ability to browse offered courses/classes, register for classes and pay online. Additionally, students can view enrollment (present & past), financial transactions (present & past), grade and attendance. If a student is registered in a class that allows partial payments, student can also make online payments toward the balance due.

What we'll Learn.....

Portal Configuration: Admin Setup

- Identifying Portal Admin
- User Credentials:
 - Username
 - Password
- Portal Configuration:
 - Images
 - Portal Text
 - Email Setup
 - Contact Us
 - Help
 - Testimonials
 - Settings
 - Inquiry
 - Waitlist
 - Self Registrations
 - Admin Approval

Portal Configuration: Admin Setup

- Registration
 - Viewable Fields
 - Mandatory Fields
- Payment Gateway
- Email Template Configuration



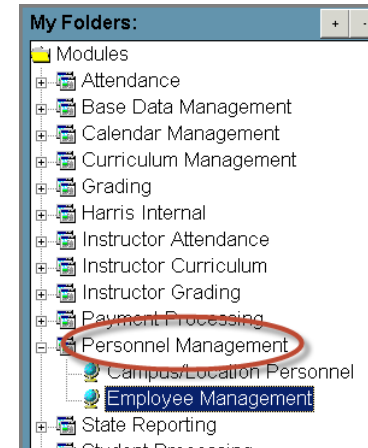
Student Portal: Administrators Guide

Getting Started

Double click > **Modules** > Double Click

Personnel Management Click **Employee Management**

A portal administrator must be identified in ClassMate. To flag a user as the portal administrator, select the **Admin** radio button located at the bottom of the general tab page in the Portal User Type Box and ensure the **User ID** is populated. **BOTH** must be present to login as an administrator.



Home Number:	(222) -	Work Number:	(222) -	Ext.:	2345
Cell Phone:	(222) -	FAX Number:	() -		
Email Address:	jfenstermacher@classlink.com				
SSN:	--	Birthdate:	/ /		
Gender:	Female				
Ethnicity:	White, Non-Hispanic				
Portal User Type					
<input type="radio"/> Instructor <input checked="" type="radio"/> Admin					

Noelle Burson, #00000112	
State PPID #:	
User ID:	classmate



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Student Portal: Helpful Hints

- Portal Administrators will use their ClassMate **Password** to login to the portal
- Portal Administrators cannot change their password via the portal
- Portal Administrators username will be the email address populated in the employee management module general Tab>Email Field

Deb Warke, #00000335

General | Position | Rates | Qualified Courses | Forms | Create/Modify

General

ID # 00000335 * State PPID #:

Title: Mrs. User ID:

First Name: Deb

Middle Name:

Last Name: Warke *

Suffix:

Address 1: 1200 Harbor Boulevard

Address 2:

Address 3: Portal Username

City/State/Zip: - Select A City/State/Zip Code

Home Number: (222) - Work Number: (222) - Ext.: 2345

Cell Phone: (222) - FAX Number: () -

Email Address: jfenstermacher@classlink.com

SSN: - - Birthdate: / /

Gender: Female

Ethnicity: White, Non-Hispanic

Portal User Type

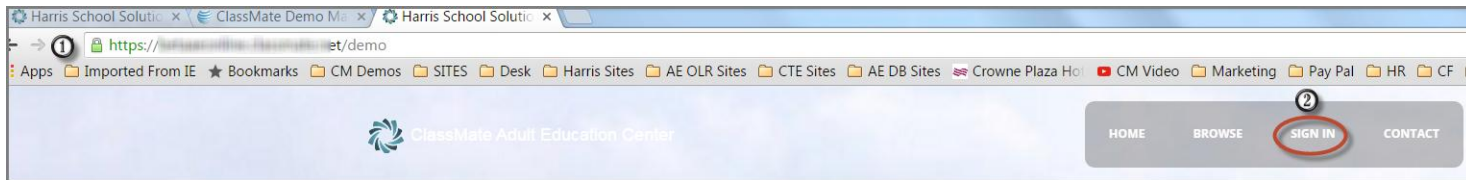
Instructor Admin



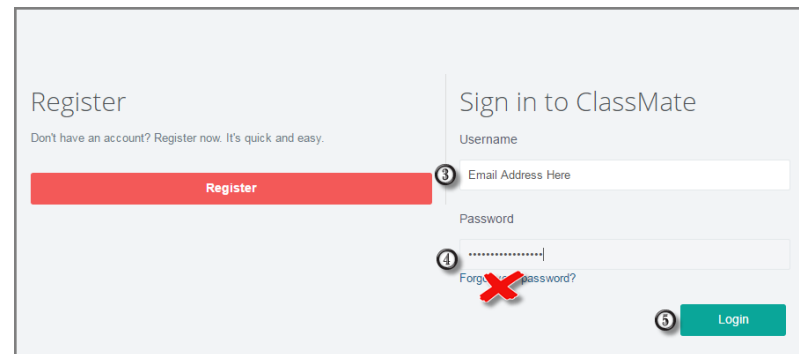
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Student Portal: Portal Configuration

- ① Enter the URL for your site the internet address field
- ② Select the **Sign In** option



- ③ Enter your email addresses in the **Username** field
- ④ Enter your ClassMate password in the **Password** field
- ⑤ Select the **GREEN Login** button

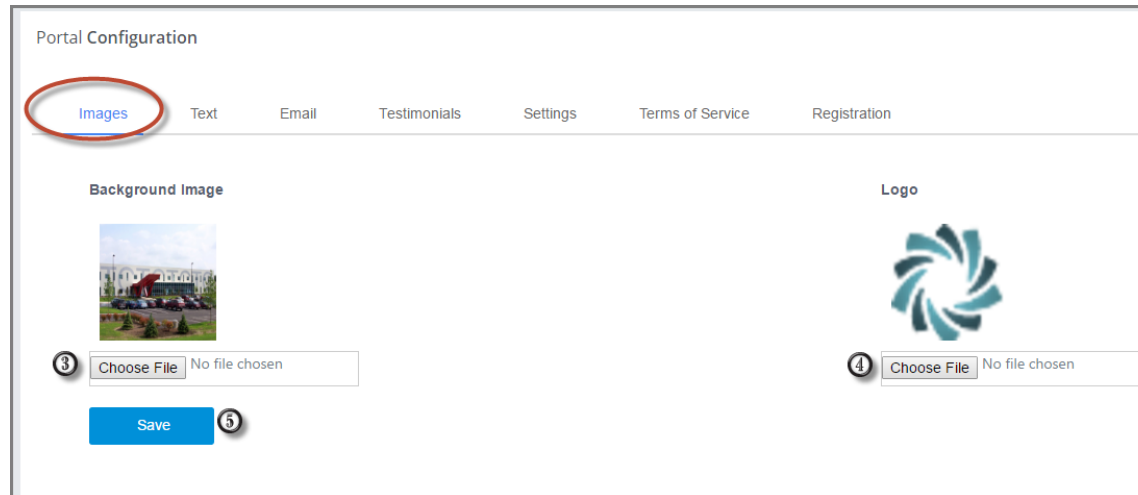
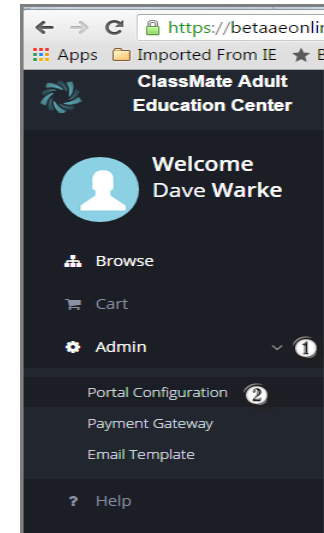



Helpful Hint: Portal Administrators may **NOT** change their password via the portal link

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Student Portal: Portal Configuration

- ① Select the **Admin** down arrow to view options
- ② Select the **Portal Configuration** option
- ③ **Images Tab:** Select the **Choose File** button to browse and select the image to be used as the **Background Image** for your site
- ④ **Images Tab:** Select the **Choose File** button to browse and select the image to be used as the **Logo** for your site
- ⑤ Select the **BLUE Save** button



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Student Portal: Portal Configuration

Portal Photo Information

ClassMate allows portal administrators the ability to upload photos & images. These files are use to customized not only the background of the student portal site but also for Programs, courses and classes and avatars. Portal Administrators can select from the ClassMate library of photos or upload their own. Please notes the following guideline for photos used on the Adult Education Student Portal:

Background Image, Logo & Avatar:

- No limit in size
- Image type should be .png or .jpg ONLY

Courses & Classes:

- Photo should be greater than 350 * 200 (width * height)
- No restrictions on image type

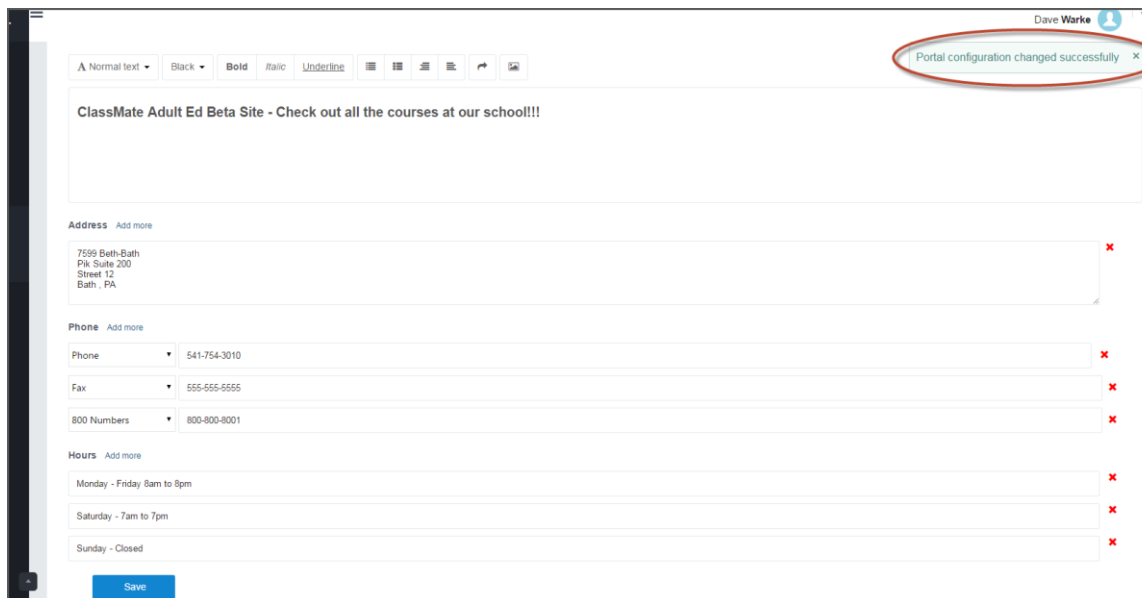


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Student Portal: Portal Configuration

The **Text Tab** allows portal administrators the ability to create verbiage and create the look and feel of the portal home page. The Text Tab contains the following fields:

- Banner Text:** Allows users to customize text font type, color, bold, placement, etc.
- Address:** Allows users to enter the school address. Additional address fields can be added for additional campus (s)
- Phone:** Allows users to enter the school phone number. Fax and 800 number fields can also be added. Limit of 3 phone fields.
- Hours:** Allows users to enter the school hours. Additional fields can be added
- Save:** Select the **BLUE Save** button. Notice the display message indicating the configurations have been successfully saved.

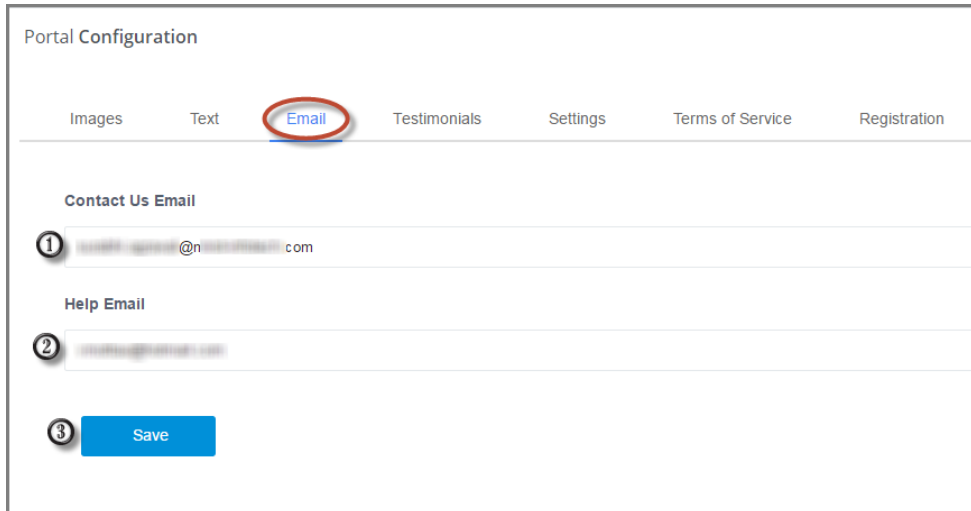


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Student Portal: Portal Configuration

The **Email Tab** allows portal administrators the ability to direct student requests for information and help to the appropriate school employees. The email addresses entered into the fields are for your school employees **ONLY**. ClassMate does **NOT** provide your student with information or direct help support.

- 1 Contact Us Email:** Allows portal administrators to direct student requests for more information to the school employee email address entered into this field
- 2 Help Email:** Allows portal administrators to direct student requests for help to the school employee email address entered into this field
- 3 Save:** Select the **BLUE Save** button. Notice the display message indicating the configuration have been successfully saved



Portal Configuration

Images Text **Email** Testimonials Settings Terms of Service Registration

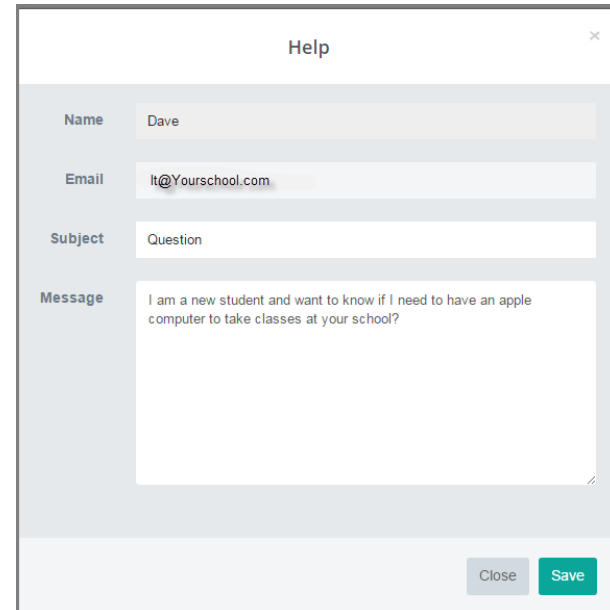
Contact Us Email

1 [email address] @n [domain].com

Help Email

2 [email address]

3 Save



Help

Name Dave

Email It@Yourschool.com

Subject Question

Message I am a new student and want to know if I need to have an apple computer to take classes at your school?

Close Save



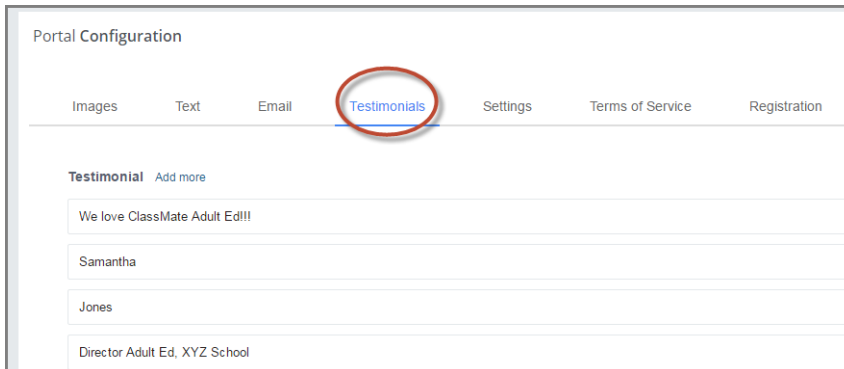
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Student Portal: Portal Configuration

The **Testimonials Tab** allows portal administrators the ability to create testimonials. These will display on the home page of the portal and scroll. Up to 4 testimonials can be created.

Testimonial : Allows portal administrators to enter testimonials

Save: Select the **BLUE Save** button. Notice the display message indicating the configuration have been successfully saved



Portal Configuration

Images Text Email **Testimonials** Settings Terms of Service Registration

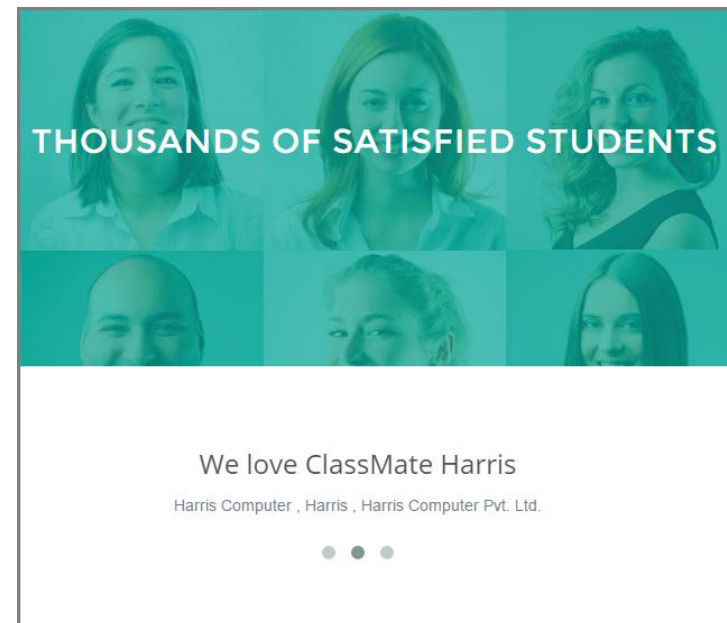
Testimonial Add more

We love ClassMate Adult Ed!!!

Samantha

Jones

Director Adult Ed, XYZ School



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Student Portal: Portal Configuration

The **Settings Tab** allows portal administrators the ability to adjust the portal global settings , which enable specific functionality on the portal.

- Inquiry is Enabled :** Allows students to make an inquiries via the portal for specific classes. Inquiries are easily identified allowing school marketing employees to contact the potential student quickly.
- Waitlist is Enabled:** Allows students to register for a class when no seats are available. ClassMate automation will place the student on the waitlist for the specific class.
- Self Registration is Enabled:** This features turns self-registration on or off for ALL classes. If self-registration is turned off, a button displays with a message to call the school to register. The phone number for this display is pulled form the phone field on the Text Tab.

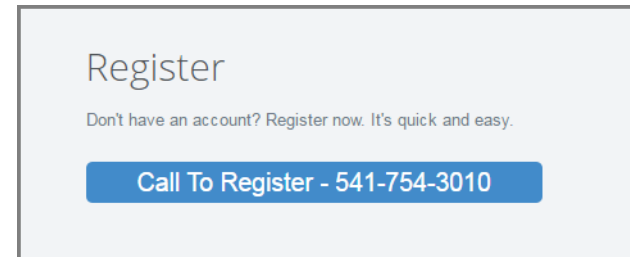


IMAGE	DESCRIPTION	FEES	TOTAL	MINIMUM PAYMENT	ACTION
	Veterinary Assistant with new text as a test Description: ClassID: 1516D Instructor: Amanda Stern Dates: 08/24/2015 - 05/27/2016 Monday: 8:00 AM - 2:30 PM Tuesday: 8:00 AM - 2:30 PM Wednesday: 8:00 AM - 2:30 PM Thursday: 8:00 AM - 2:30 PM Friday: 8:00 AM - 2:30 PM Available Seats: 47	\$50.00-Application Fee - PS FullTime \$10.00-Child Abuse Background Check \$10.00-Criminal Background Check	\$70.00	Payment in Full Required	<div style="border: 2px solid red; border-radius: 50%; padding: 5px; display: inline-block;"> Call To Register 541-754-3010 </div> Inquiry



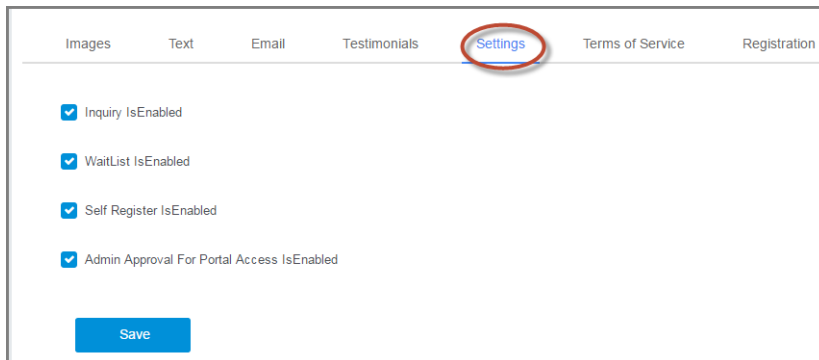
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The **Settings Tab** allows portal administrators the ability to adjust the portal global settings , which enables specific functionality on the portal.

Admin Approval For Portal Access in Enabled:

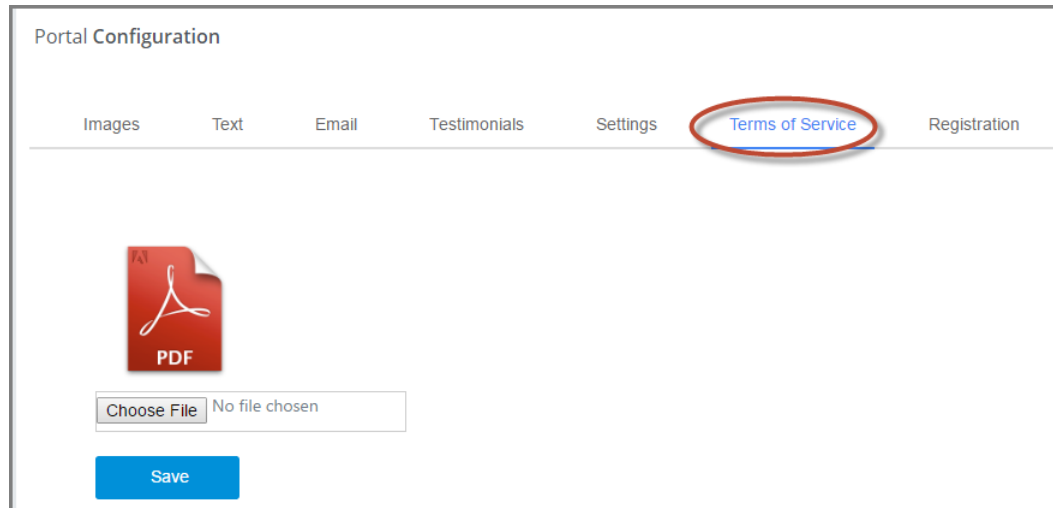
This feature allows schools a greater level of control over student registration. If enabled, will NOT have the ability to register for classes until the student has been flagged in ClassMate as yes for “**Portal Access**” . If enabled, the school the school **MUST** approve students for portal access before they can register.



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The **Terms of Service Tab** allows portal administrators the ability to upload .PDF documents related to terms of service and usage. ClassMate customers browse to the file location and upload the .PDF document to display.

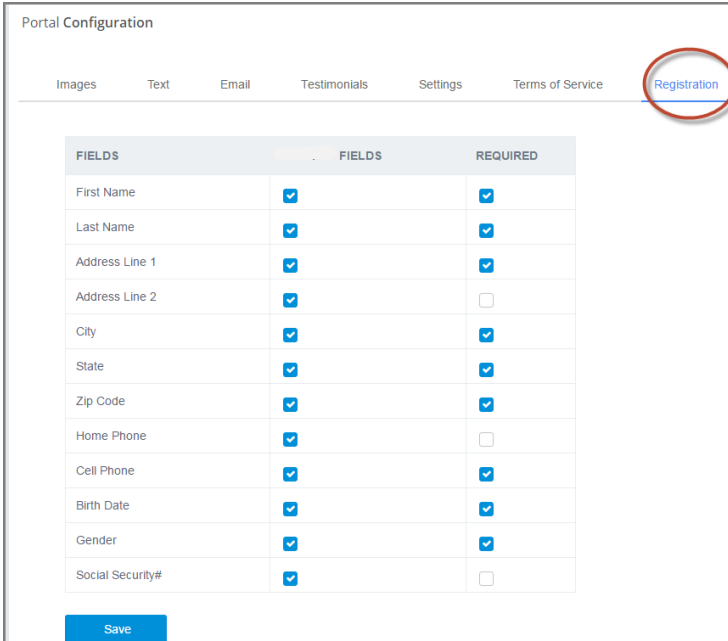


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The **Registration Tab** allows portal administrators the ability to select from a listing of fields to be visible on the portal when students register for a portal account. Additionally, administrators can also flag the fields as “**Mandatory**” meaning registrants **MUST** complete the field or they will not be able to complete the registration process. and usage. Fields Include:

- First Name
- Last Name
- Address Line 1
- Address Line 2
- City
- State
- Zip Code
- Home Phone
- Cell Phone
- Birth Date
- Gender
- Social Security #



Portal Configuration

Images Text Email Testimonials Settings Terms of Service **Registration**

FIELDS	FIELDS	REQUIRED
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Home Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cell Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Birth Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Social Security#	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save



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Registration Help Hints:

After a student has registered on the ClassMate Student Portal an automated registration email will be generated and sent to the email address entered during the registration process. The registration email contains the following information:

Student Name

Email Address

Password

Welcome Cooper Stern!

You are successfully registered with AEOnline.
You can now log in with following credentials:

Email: [REDACTED]

Password: [REDACTED]

Thanks & Regards,
The Harris School Solutions Team

If a student does not receive confirmation of portal registration, the following items should be checked:

Email address: Ensure the email address has been entered correctly and contains no typos

Email Address: Ensure the email address is viable

Email provider is not blocking emails from the ClassMate Student portal as spam, etc.

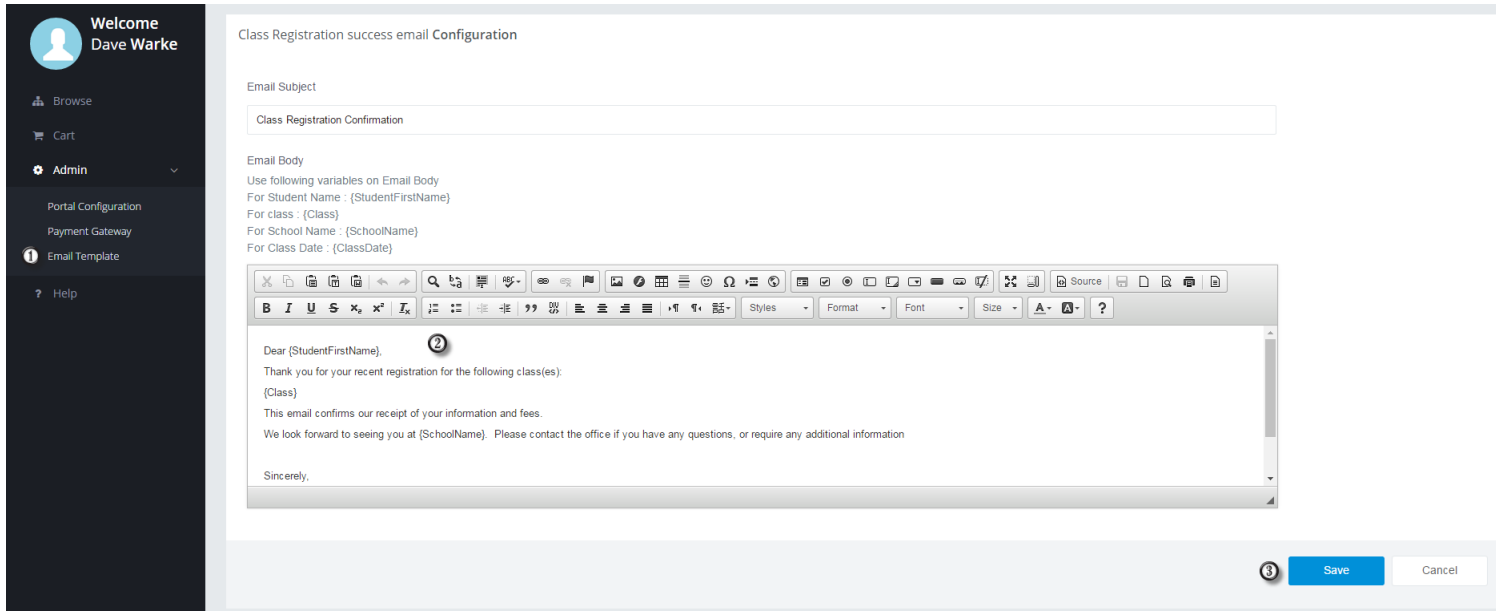


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Student Portal: Portal Configuration

Students registering for classes via the ClassMate Student Portal by default will receive an email (configured by the Portal Administrator) confirming the successful registration. Portal Administrators can configure the confirmation email using the Email Template link.

- 1 Select the **Email Template** link
- 2 Enter the desired verbiage and variable fields from the email choices to configure the email
- 3 Select the **BLUE Save** button



The screenshot shows the 'Class Registration success email Configuration' page. On the left is a dark sidebar with a user profile for 'Dave Warke' and navigation links: Browse, Cart, Admin, Portal Configuration, Payment Gateway, Email Template (highlighted with a circled '1'), and Help. The main content area has a title 'Class Registration success email Configuration'. Below the title is an 'Email Subject' field containing 'Class Registration Confirmation'. Underneath is an 'Email Body' section with instructions: 'Use following variables on Email Body', 'For Student Name : {StudentFirstName}', 'For class : {Class}', 'For School Name : {SchoolName}', and 'For Class Date : {ClassDate}'. A rich text editor follows, containing the text: 'Dear {StudentFirstName},', 'Thank you for your recent registration for the following class(es):', '{Class}', 'This email confirms our receipt of your information and fees.', 'We look forward to seeing you at {SchoolName}. Please contact the office if you have any questions, or require any additional information', and 'Sincerely,'. At the bottom right of the editor are 'Save' and 'Cancel' buttons, with a circled '3' next to the Save button.



ClassMate *for Adult Education*

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

www.classmate.net

<http://harrisschoolsolutions.com/>

