

# ClassMate 101: Learning the Basics

October 2, 2018



# Learning the Basics

## ClassMate 101 Overview:

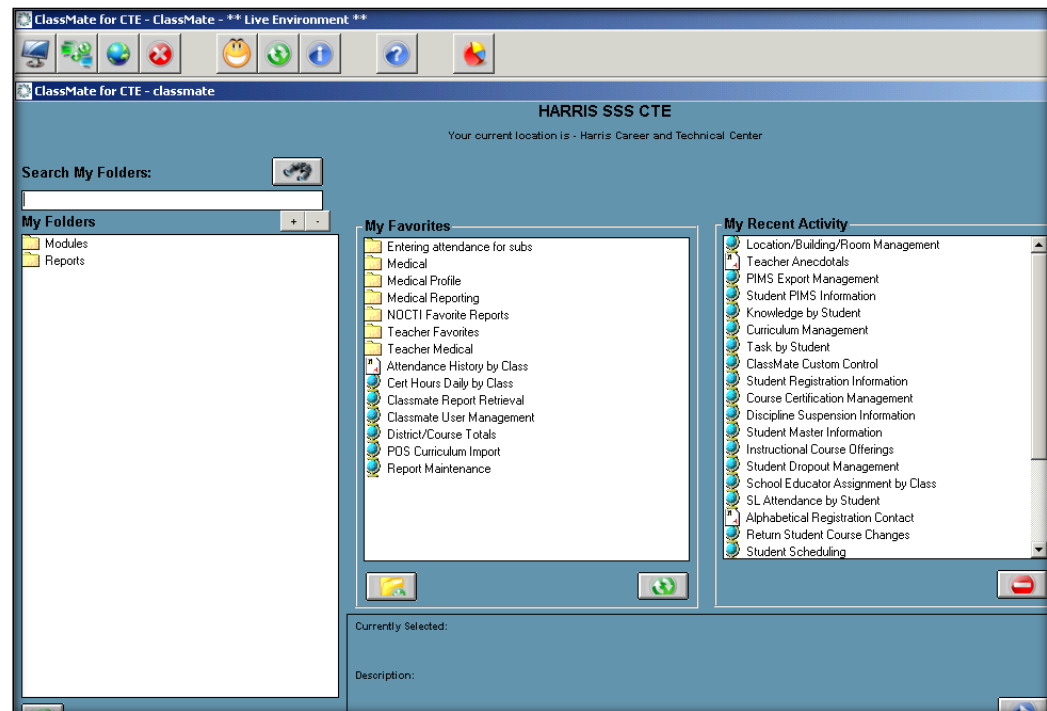
- Navigating the System
- Using Navigation Buttons
  - Sign-In Form
  - Main Menu
  - User Modules
- » Entering Base Data
  - Creating Base Data
  - Maintaining Base Data
- » Running Reports
  - Viewing Data Online
  - Printing Paper Reports



# Navigating in ClassMate

## Understanding the System Navigator

- Three (3) Primary Windows:
  - My Folders
  - My Favorites
  - My Recent Activity
- User Defaults
  - Module Size
  - Font Size
  - User Password
  - Refresh
- Search Folders Option



# Navigating in ClassMate

## Navigation Buttons

A series of color-coded buttons in ClassMate are available throughout the software. These buttons make it simple to perform common user tasks. The navigation buttons are divided into the following 3 categories:

### Sign-In Form Buttons

- Located on the log-on screen to ClassMate; simply enter your user name and password and click on the green checkmark

### System Navigator Buttons

- Located on the ClassMate Navigator screen, these buttons are used to refresh modules, user defaults, favorites, and more.

### User Module Buttons

- Located on the top tool bar of each module, new buttons are used to save, delete, search, and close screens.

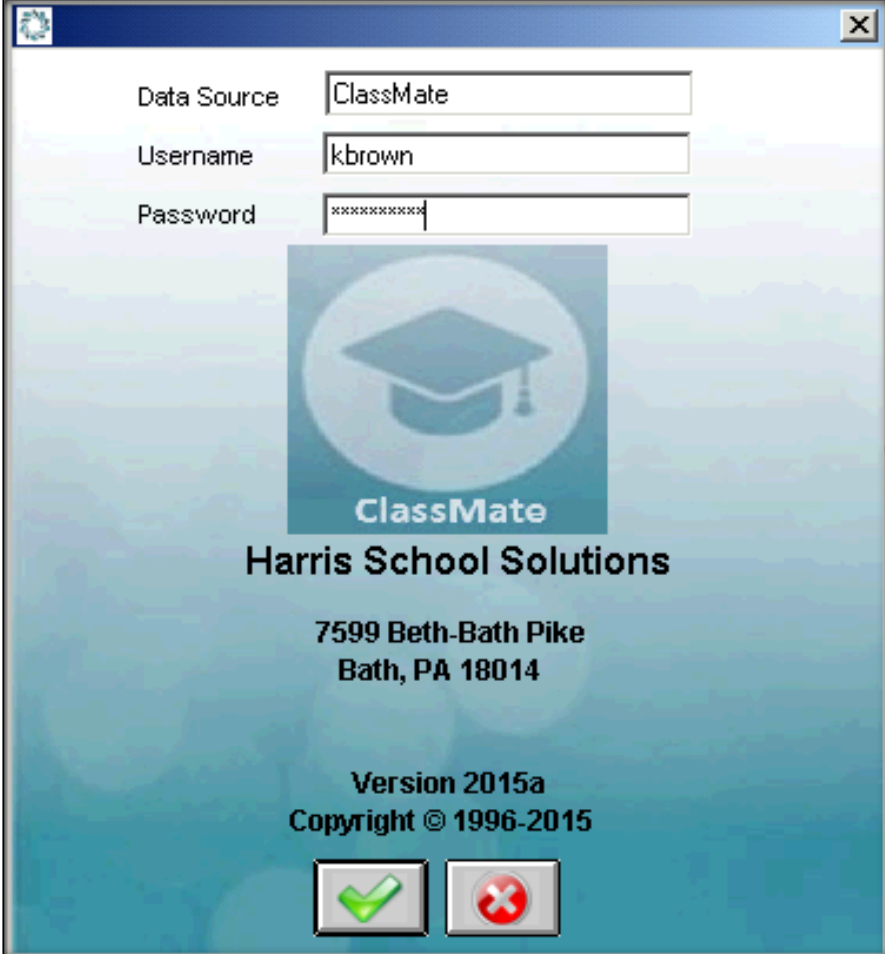
Please refer to the following button key for navigating in ClassMate.



# Sign-In Form Buttons

## Signing In To ClassMate

1. Data Source
    - ClassMate = CTE
    - Cm\_Training = Training Database
  2. User Name (site decision)
    - First Initial, Last Name
    - First Name.Last Name
  3. Password
    - Custom Defined, Alpha/Numeric (not case sensitive)
- **Green Check = ENTER**
  - **Red Circle X = EXIT**



# System Navigator Buttons








## ClassMate Navigator Key

1. Opens Help screen to clarify login messages displayed on the toolbar.
2. Switches from Admin to Teacher Environment
3. Displays the System Navigator from Hidden Mode.
4. Closes the ClassMate Application.
5. Allows for access to/modification of User Defaults.
6. Refreshes any updates to User Defaults.
7. Displays the current ClassMate Version.
8. Displays the ClassMate Dashboard View.



# User Module Buttons

## ClassMate Module Key

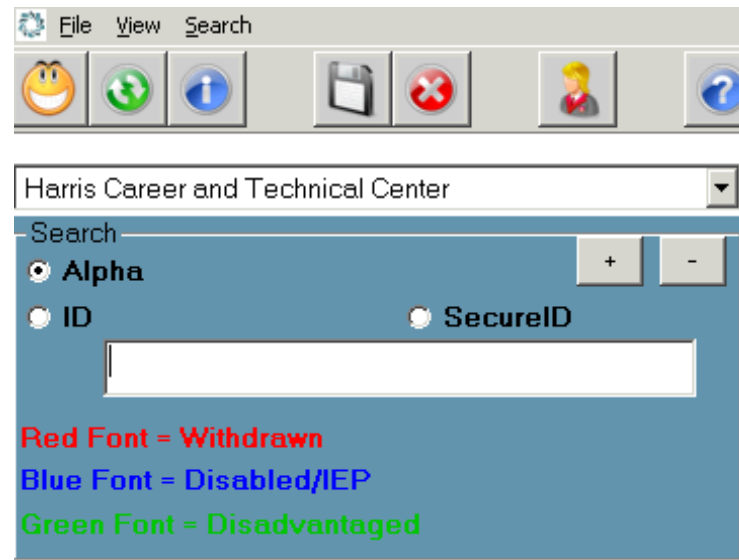
1.  Yellow Smiley Face: Opens User Defaults
2.  Green Arrow Refresh: Refreshes User Defaults
3.  Blue Info Circle: Information on ClassMate Version
4.  Black Diskette Icon: Saves Data
5.  Red Minus Sign: Deletes Data
6.  Red "X" Sign: Exits Module
7.  Headshot: Displays Student Snapshot (some modules)

Select Location

Search Alpha

Search ID #

Search Secure ID # (some modules)



# Managing Base Data

- **Base Data Overview**
  - Base Data Checklist
    - System Data
    - Staff Data
    - Subject Data
    - Student Data
  - Base Data Entry
    - Create Data
    - Edit Data
    - Delete Data








# Base Data Checklist

## Base Data Checklist

### Base Data Checklist

- An outline of all required data worksheets to be completed prior to, and during, implementation of the ClassMate software. Worksheet provided during Kick Off & Utilization Planning meeting.

### Color Code:

-  Yellow = Base Data needed from School, entered during a Training Session. – manual entry
-  Green = Base Data that is imported with State Reporting templates (Student and Staff) = imported
-  Pink = Base Data Required to complete/update after the import process – manual updates

### Base Data Worksheets

ClassMate provides schools with a central data repository, where all Base Data is established. Once base data is entered, students may be registered and/or imported into the Registration database.

Worksheets are provided for each school to complete for customization of the ClassMate database with the individual characteristics that make it unique, such as component districts, room configuration, course offerings, etc. |

#### Base Data Worksheet Outline:

1. US States Maintenance
2. City Maintenance
3. County Maintenance
4. Location/Building/Room Management – A. Campus Information
5. Location/Building/Room Management – B. Location Information -
6. Location/Building/Room Management – C. Building Information
7. Location/Building/Room Management – D. Room Information
8. Locker Management (not required)
9. Sending School Management – A. District Information
  - o District Name updates (ex: District 1 → Central Area School District)
10. Sending School Management – B. Sending School Information
  - o School Name updates (ex: School 1 → Central Area High School)
11. Sending School Management – C. Time Schedules
12. Personnel Management – A. Campus Personnel -
13. Personnel Management – B. Location Personnel
14. Personnel Management – C. District Personnel
15. Personnel Management – D. Sending School Personnel
16. Employee Management
  - o PIMS Staff Import
17. Instructional Classifications – A. Educational Category Information
18. Instructional Classifications – B. Cluster Information
19. Instructional Classifications – C. Delivery Information
20. Instructional Classifications – D. Post-Secondary Options
21. Instructional Classifications – E. Career & Technical Student Organizations (CTSO)
22. Period Management
23. Instructional Course Offerings – A. Program Information
  - o Program Name updates (ex: Program 1 → Culinary Arts)
24. Instructional Course Offerings – B. Course Information
  - o Course Name updates (ex: Course 1 → Culinary Arts)
25. Instructional Course Offerings – C. Class Information
  - o Class Name updates (ex: Class 1 → AM/1)
26. Career Pathways Management
27. (POS) Curriculum Management – A. Duty Information
28. (POS) Curriculum Management – B. Task Information
29. Teacher/Course Assignment
30. \*\*Student Enrollments & Schedule for first day of school, open ended end date (Student Registration & Student Master)
  - o Student Schedule changes & withdrawals



# Base Data

## Create/Edit/Delete

### Base Data Entry – Sample Module

Base Data may be:

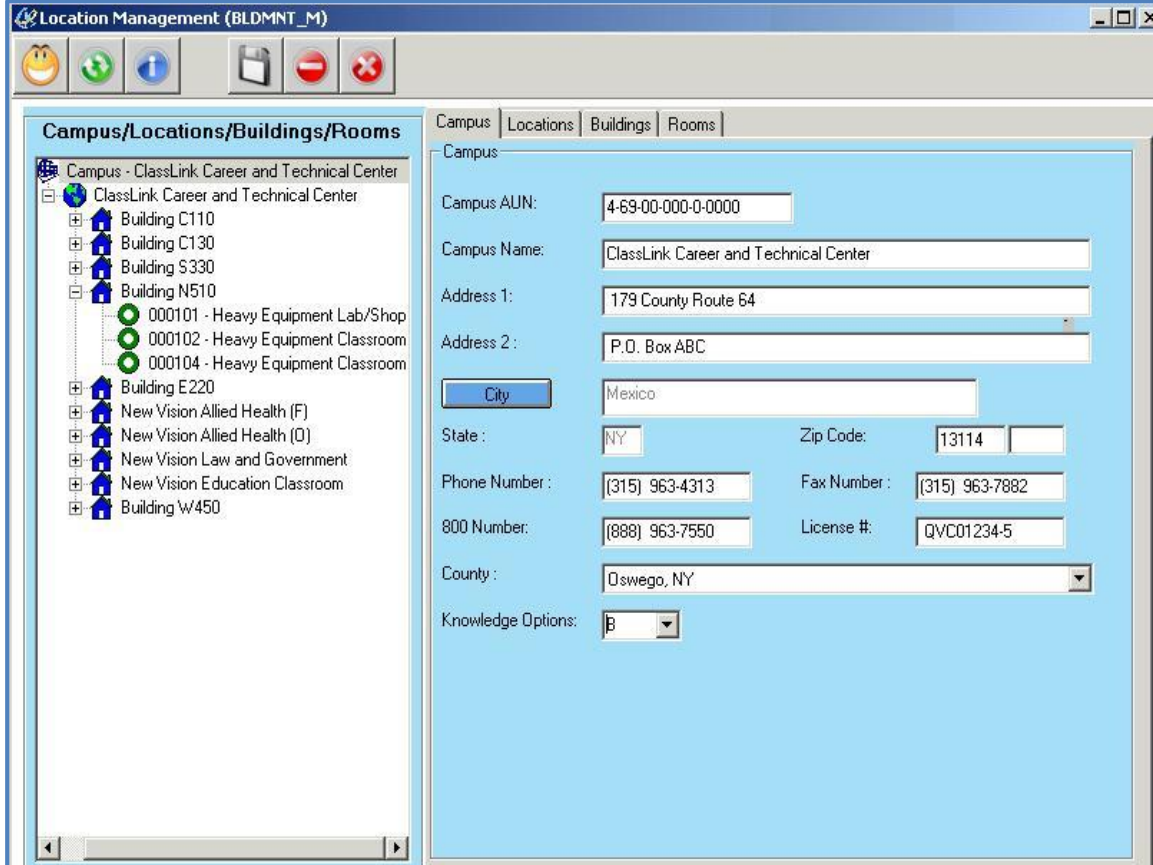
- Created
- Edited
- Deleted

Group Trees are:

- Displayed on left-hand side
- +/- available to view suppressed data

Data Tabs are:

- Displayed across right-hand side
- Fields to enter data



The screenshot shows the 'Location Management (BLDMNT\_M)' application window. On the left, a tree view displays the hierarchy: 'Campus - ClassLink Career and Technical Center' expanded to show 'ClassLink Career and Technical Center' with sub-items for various buildings (C110, C130, S330, N510, E220, W450) and classrooms (000101-04). On the right, a 'Campus' data entry form is visible with the following fields:

- Campus AUN: 4-69-00-000-0-0000
- Campus Name: ClassLink Career and Technical Center
- Address 1: 179 County Route 64
- Address 2: P.O. Box ABC
- City: Mexico
- State: NY
- Zip Code: 13114
- Phone Number: (315) 963-4313
- Fax Number: (315) 963-7882
- 800 Number: (888) 963-7550
- License #: QVC01234-5
- County: Oswego, NY
- Knowledge Options: B

# Running Reports

- Report Folder
  - Expanding Report folder
  - Report Icon
- Report Selection
  - Report Parameters
  - Printer Settings
  - Report Options
    - Group Tree
    - Printing
    - Exporting
    - Refresh\*
    - Group Tree Toggle\*
    - Magnify\*
    - Page Feature\*



# Key Terms

## Running Reports

### Reporting Key Terms

<b>Module</b>	ClassMate function allowing users to input data, edit, etc.
<b>Report</b>	ClassMate function allowing user to view data in the system. Read only.
<b>Report Parameters</b>	Absent: Select for students not in class Present: Select for students present in class
<b>Group Tree Toggle</b>	Allows full screen presentation of report or group tree view
<b>Export</b>	Ability to take a ClassMate report and save for ease in sharing data.
<b>Refresh</b>	Pulls any new data into the ClassMate report being run
<b>Page Feature</b>	Allows the user to page through reports one page at a time, much like turning the pages in a book. Also, allows the user to jump from the first page of the report to the last page of the report.
<b>Magnify Feature</b>	Magnifies the report page for ease in viewing
<b>Print</b>	Allows the user to print the select pages or pages as needed
<b>Printer Settings</b>	Allows the user to select desired printer and print properties



# Running Reports

## ClassMate Reporting Navigation Key

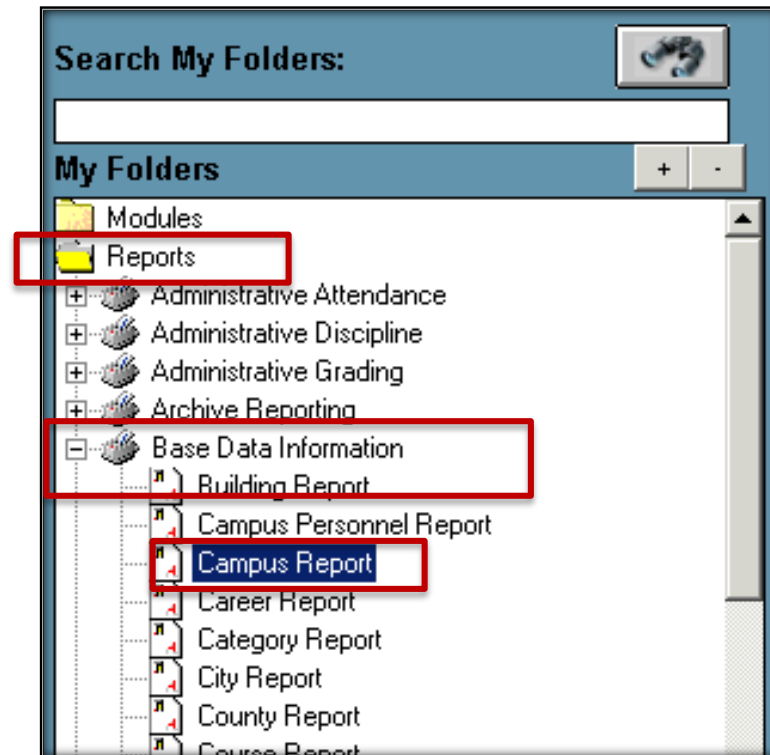
1. Allows the user to adjust their application defaults
2. Allows the user to adjust their application defaults Or Allows the user to refresh the folder or favorites lists seems to
3. Displays information about the ClassMate application and version
4. Allows the user to adjust printer settings
5. Closes the current report



# Running Reports

## Getting Started

- Open up the Reports Folder by double clicking it
- Double click on the **Category Folder** or click on the + sign to the left of the Category Folder to expand
- Select desired report from folder by single clicking

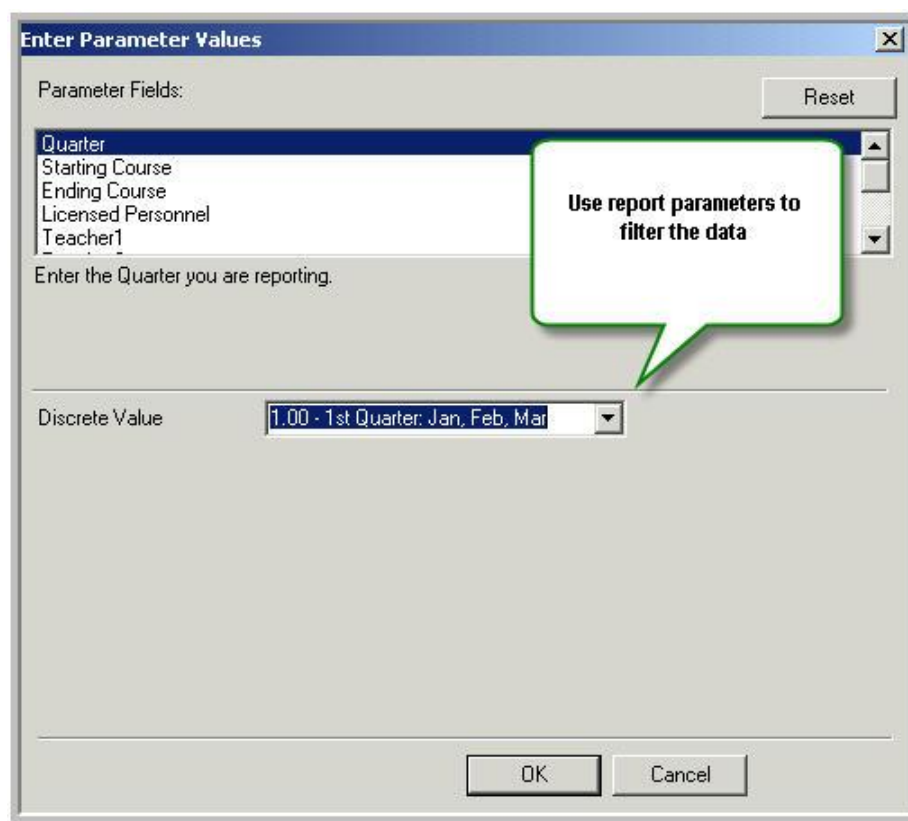


# Running Reports

## Running Reports in ClassMate

- Select **report parameters** from the listed available fields
- Enter desired data in the **discrete value** field
- Click **OK**
- Report will display

NOTE: Available fields will vary by report. Ensure you are entering names and titles exactly as they appear in ClassMate. Ending fields must have a Z suffix.



Enter Parameter Values

Parameter Fields: Reset

Quarter  
Starting Course  
Ending Course  
Licensed Personnel  
Teacher1

Enter the Quarter you are reporting.

Discrete Value: 1.00 - 1st Quarter: Jan, Feb, Mar

OK Cancel

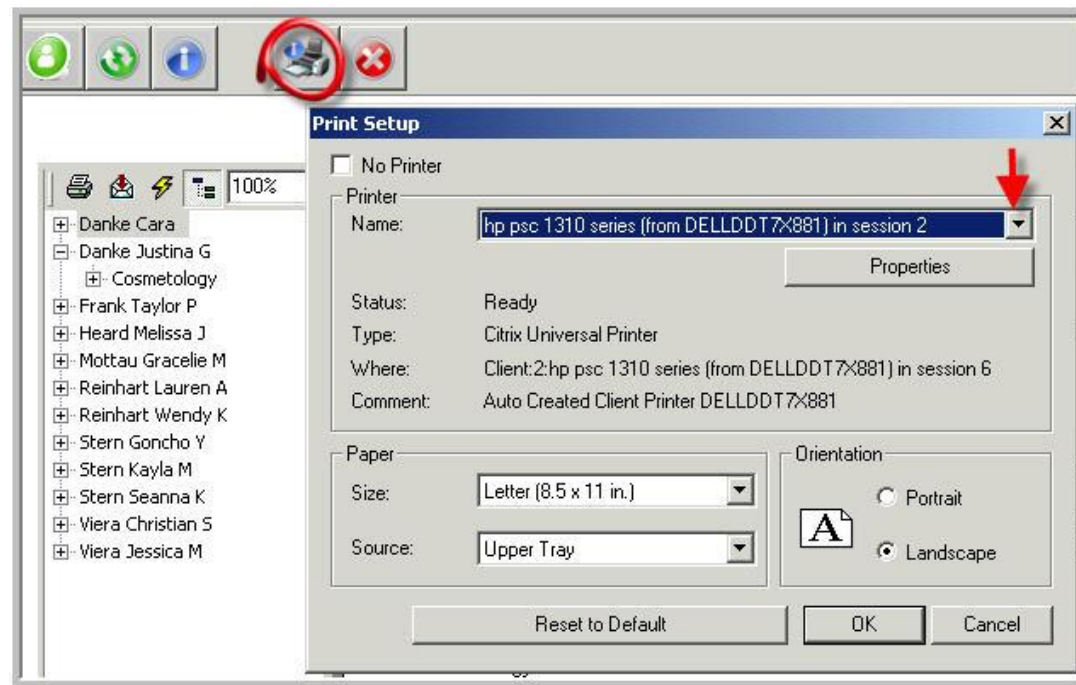
Use report parameters to filter the data



# Running Reports

## Printer Setup in ClassMate

- ClassMate allows users to customize printer settings
- Select the black printer icon located on the tool bar along the top of the screen
- Customized printer setting as desired: Select printer, print properties, orientation, etc.
- Click **OK**



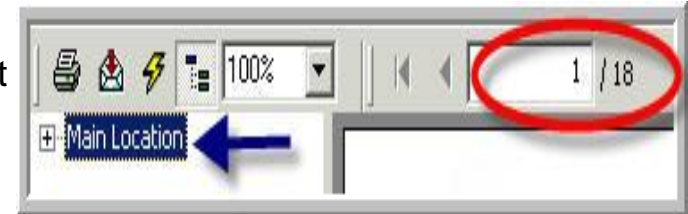


# Running Reports

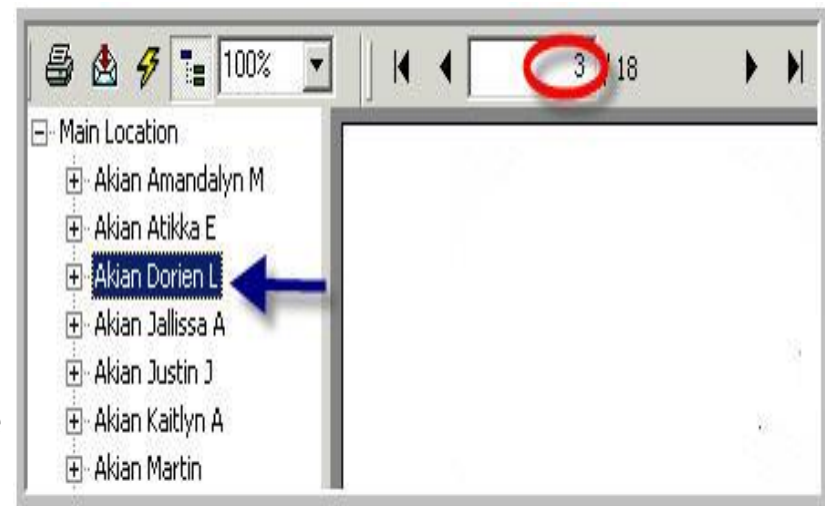
## ClassMate GroupTree

Many reports in ClassMate can be large and contain multiple pages. Within the ClassMate reporting functionality a GroupTree exists to help the user easily locate data within large reports. The ability to page through the report one page at a time to find a student exists however, often it is more efficient if you can quickly located the student or program without having to page through the entire report

The GroupTree window can be found to the left of the report display. Highlighted in this example by the blue arrow.



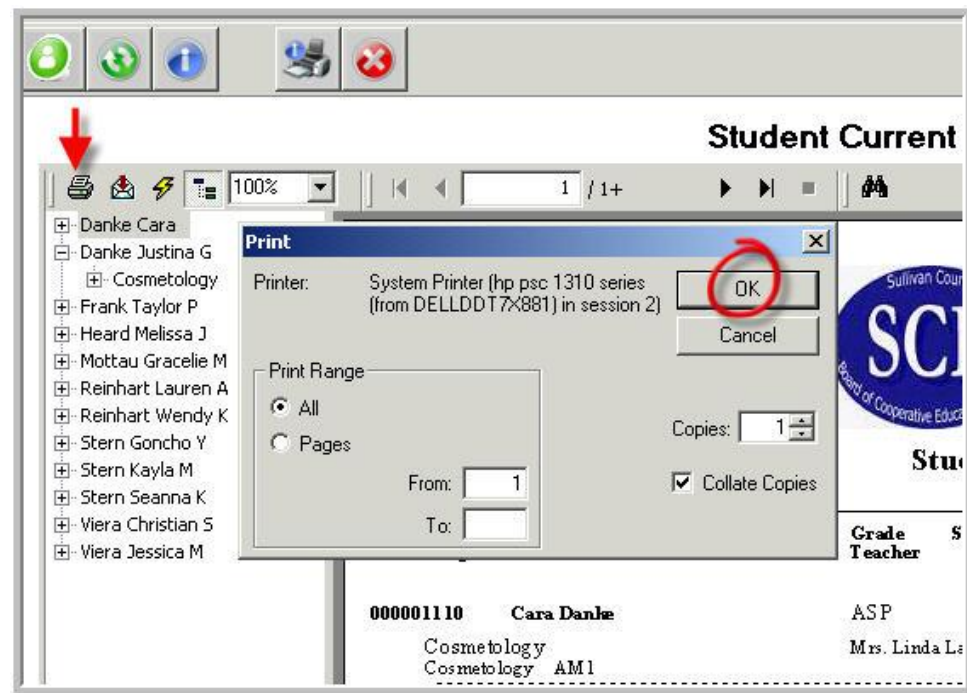
- Click on the + sign to the left of Main Location
- The list will expand below. Items displayed will vary based on the report.
- Click on the selected name, program, etc.
- The report will jump to the selected criteria for display
- The entire report or just the selected pages are available for printing



# Running Reports

## Printing Reports in ClassMate

- Print report by clicking on the printer icon located in left hand view (see red arrow)
- Select pages to print
- Select number of copies
- Click **OK**

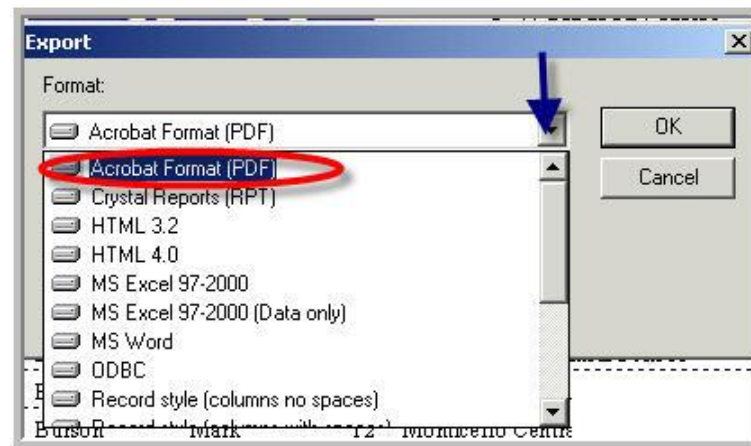


# Running Reports

## Exporting Reports in ClassMate

In ClassMate it is possible to export any report in a variety of file formats to a local drive, removable media source or network.

- Click the white export envelope located in the top left corner above the GroupTree.
- Select the file format to export the report.
- Click on the drop down arrow and select the file format you would like to export the report.



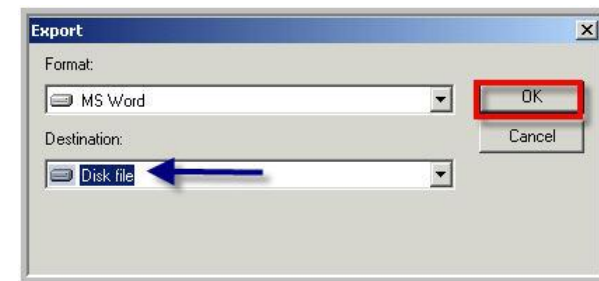
ClassMate recommends using PDF for reports containing information that should not be altered.



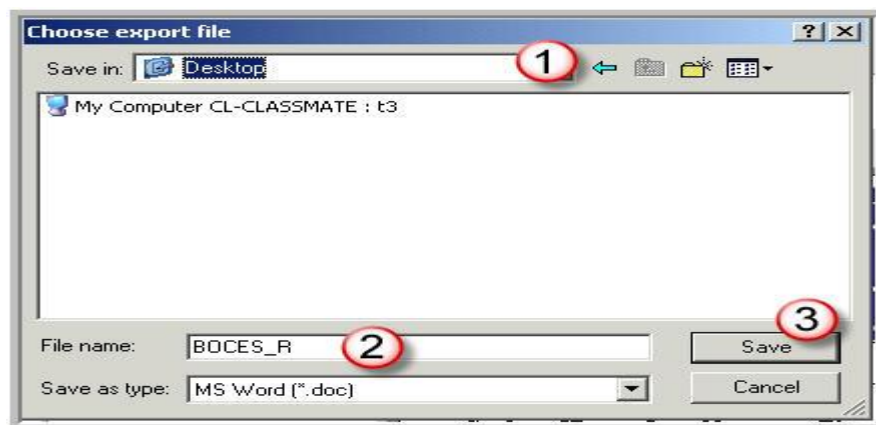
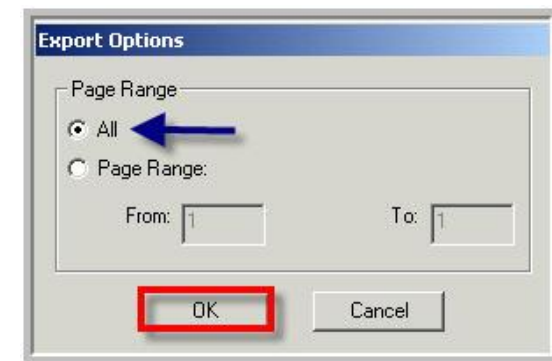
# Running Reports

## Exporting Reports in ClassMate

- Select the export file destination. ClassMate will default to Disk file. Most often this the desired location.
- Click “OK”
- In Export Options select the pages range: All or number of pages from and to
- Click “OK”



1. Select file save location from the drop down menu field **Save In:**
2. Click “Save”
3. Retrieve the exported file as you would any other file. Open, attach or print as needed.









# Running Reports

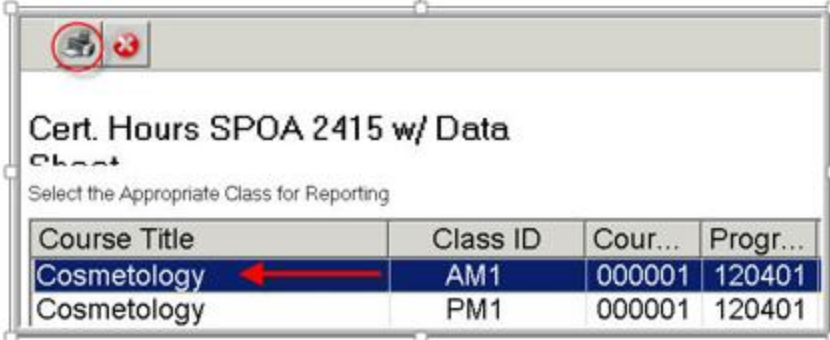
## Teacher Reports in ClassMate

ClassMate has a variety of canned Teacher Reports available. In order to run a teacher report, your username must be associated with a Teacher Employee record; that way the system will know what specific Instructional Class to show you data for. Teachers should only have access to see data that pertains to their students only.

When a teacher opens a report, they are immediately brought to this white screen where they must select the class for which they would like to see data for. The only classes that will appear in the list is the classes associated to that teacher.

### Teacher Report Folders

- +  Teacher Attendance
- +  Teacher Curriculum
- +  Teacher Discipline
- +  Teacher Grading
- +  Teacher Options
- +  Teacher Quarterly Evaluation



Course Title	Class ID	Cour...	Progr...
Cosmetology	AM1	000001	120401
Cosmetology	PM1	000001	120401

Teachers have the same ability to select printer settings, print, export, select from the group tree, etc.



## ClassMate

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Questions? Contact us!

*ClassMate HelpDesk*

*855-984-1228*

*[support.classmate.net](http://support.classmate.net)*

