

Introduction to System Administration

A Quick Reference Guide

April 2021



Agenda



- Introduction
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- Accessing ClassMate
 - Live Database First Time Steps
 - Using LaunchPad
- User Processing
 - Employee Management
 - User Group Processing Module
 - ClassMate User Management Module
 - User Module Management Module
- Required steps before schools first training session on Base Data
 - Set Up Employees and Users
 - Set Up the Training Lab and Database
 - Log Users Into the Training Database
- Training Database
 - Overview
 - Training Database Refresh



Overview:

ClassMate System Administrator



The ClassMate System Administrator is responsible for establishing the technical parameters of the ClassMate software. Working in collaboration with the Management Administrator, the System Administrator's role consists of customizing and maintaining the technical environment for ClassMate.

ClassMate provides the System Administrator with an integrated suite of tools to

- Manage ClassMate User Groups, ClassMate Users
- Manage ClassMate Module/Reports
- Customize ClassMate Settings
- ClassMate Troubleshooting
- Specialty Processing



Accessing ClassMate:



Accessing ClassMate

- The URL <https://cmgateway.harriscomputer.io/#/> takes users directly to the ClassMate Gateway
- The majority of the users will use the ClassMate CTE Connection
- Other users will need the additional ClassMate Desktop Connection where other functions can be performed, usually System Administrator and key people (ex: those involved with State Reporting)
 - Example Additional Functions:
 - Access ClassMate M drive to access State Reporting Exports, etc.
- The System Administrator will need to work with the Harris Help Desk team to establish usernames and passwords for users by providing the below information via a TeamSupport ticket:
 - First Name
 - Last Name
 - ClassMate UserName
 - Email AddressAlso please identify if they are a teacher or admin/support staff (teachers are not provided access to M:drive or Crystal)
Additionally - If you have any Staff who are no longer at your site please send us their Username & Email Address so we can remove them from Gateway.
- Please direct users to create a password that falls within the requirements on the Self Service Password setup page: <https://cmssp.harriscomputer.io/> which is used to access Password Reset and/or Forgot Password functionality for their Gateway password.
- Users will receive email notification prior to Gateway password expiration which is every 90 days.



User Processing:

Employee Management Module

Overview

The Employee Management module is used to create new employees or edit existing employees.

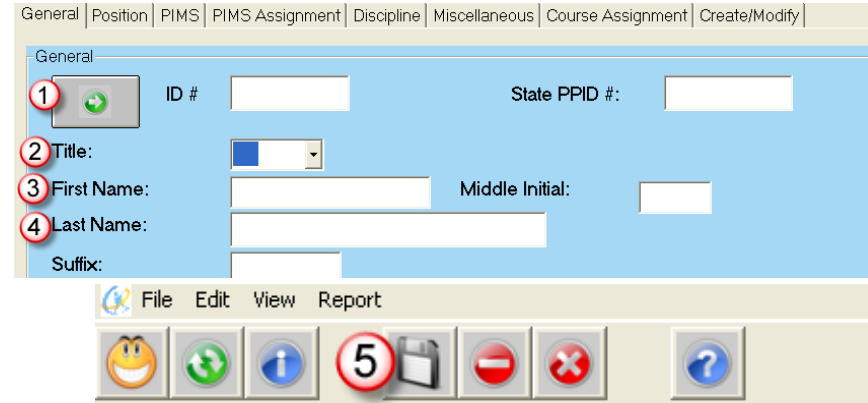
Getting Started

Double Click **Modules** > Double Click **Personnel Management** > Single Click **Employee Management**

Employee Management Module

As the site System Administrator if the Employee does not already exist in the Employee Management module the site will need to enter the following data fields.

- 1) Click Next Number (green arrow) button to get Next Employee ID Number
- 2) Select a Title
- 3) Enter the Employee First Name
- 4) Enter the Employee Last Name
- 5) Click the Save button



The screenshot shows the 'General' tab of the Employee Management module. The form fields are as follows:

- 1**: A 'Next' button with a green arrow icon.
- 2**: A 'Title' dropdown menu.
- 3**: 'First Name' and 'Middle Initial' text input fields.
- 4**: 'Last Name' and 'Suffix' text input fields.
- 5**: A 'Save' button with a floppy disk icon.

Other visible elements include a navigation bar with tabs (General, Position, PIMS, PIMS Assignment, Discipline, Miscellaneous, Course Assignment, Create/Modify) and a toolbar with icons for File, Edit, View, Report, a smiley face, a green arrow, an information icon, a red minus sign, a red X, and a help icon.



User Processing:

Users and Groups Management



Overview

ClassMate site System Administrators can fine tune, with great precision, which users or groups of users have access to modules and/or reports. The ability to customize user access is achieved through three main modules.

Getting Started

Double Click **Modules** > Double Click **System Administrator** > Single Click **one of the modules below**

- User Group Processing Module
- ClassMate User Management Module
- User Module Management Module



User Processing:

User Group Processing Module

User Group Processing Module

Allows the system administrator to:

- Add, edit or delete User Groups > **Group Maintenance** tab
- Assign users to established User Groups > **Group Assignment** tab

Getting Started

- Double Click **Modules** > Double Click **System Administrator** > Single Click **User Group Processing**



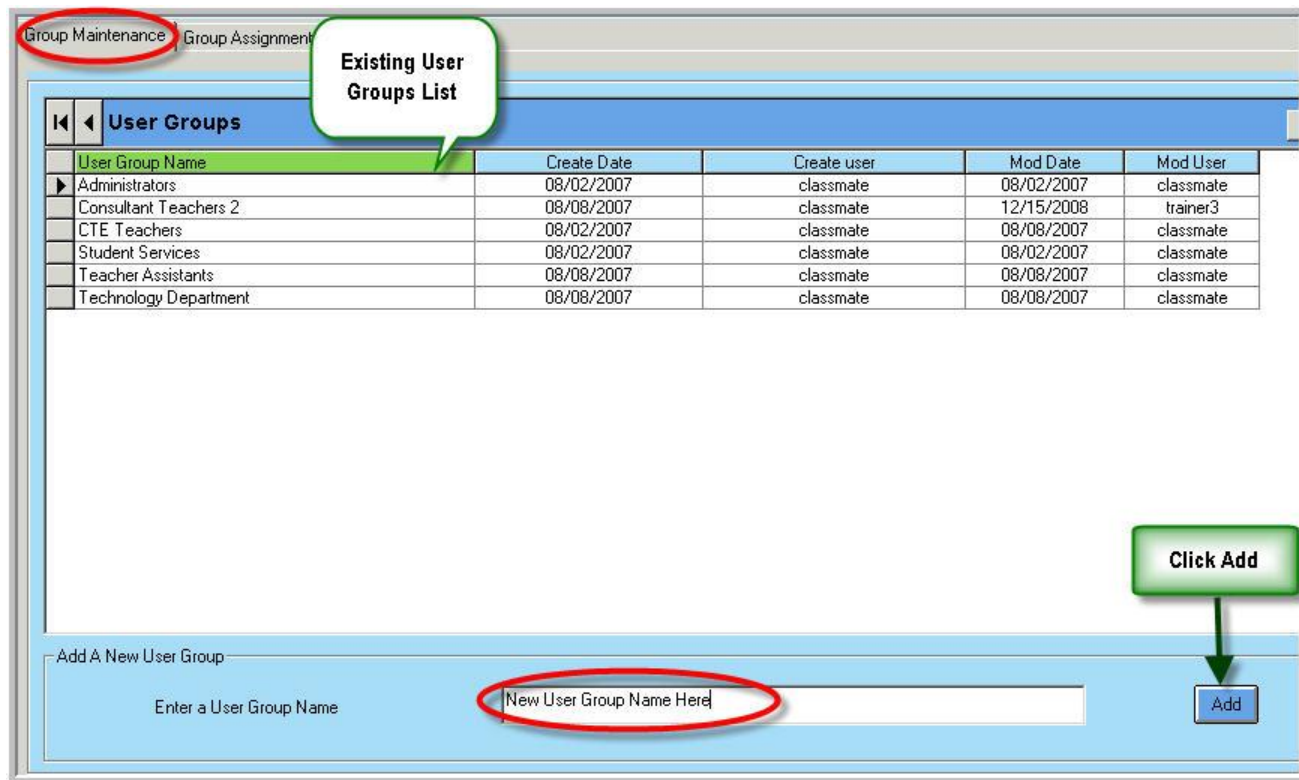
User Processing:

User Group Processing Module

Adding a New User Group

New User Groups are created in the **Group Maintenance** tab

- Locate the **Add A New User Group** section (lower portion of the screen).
- Enter a **User Group Name**. e.g.: teachers, student services, etc.
- Click **Add**.



Group Maintenance Group Assignment

Existing User Groups List

User Group Name	Create Date	Create user	Mod Date	Mod User
Administrators	08/02/2007	classmate	08/02/2007	classmate
Consultant Teachers 2	08/08/2007	classmate	12/15/2008	trainer3
CTE Teachers	08/02/2007	classmate	08/08/2007	classmate
Student Services	08/02/2007	classmate	08/02/2007	classmate
Teacher Assistants	08/08/2007	classmate	08/08/2007	classmate
Technology Department	08/08/2007	classmate	08/08/2007	classmate

Add A New User Group

Enter a User Group Name

Click Add

Add

User Processing:

User Group Processing Module

Group Assignment Tab

New User Groups are created in the **Group Maintenance** tab

- Click on an individual user from the list on left of the screen to select.
- Click >> to add the selected user to the assignment list.
- Click on a user group from the list of available Groups.
- Click >> to add the selected group to the assignment list.
- Click ALL if selected user(s) are to be placed in all groups.
- Click on the black disk icon to save.
- A confirmation message will appear indicating “User Group assignments have been saved.”

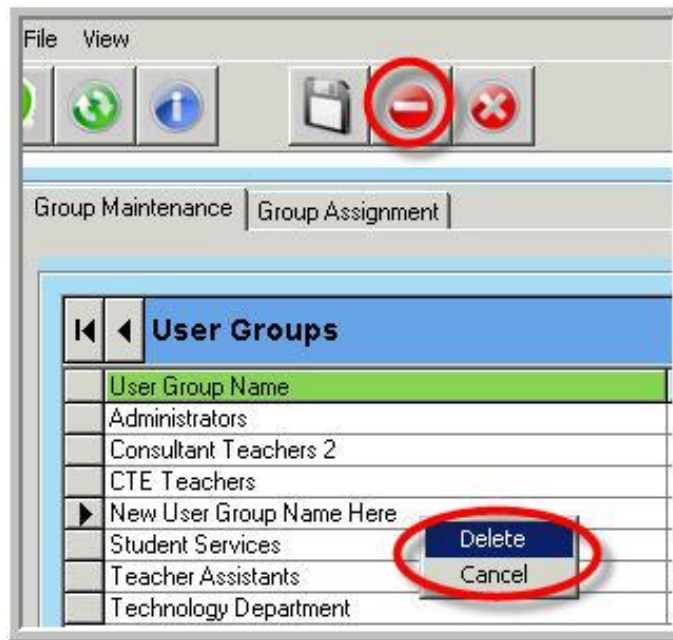


User Processing:

User Group Processing Module

Delete an existing User Group

- Select the Group Maintenance tab
- Highlight the **User Group** row by clicking the left column.
- Click the **delete** button (red circle icon on the toolbar) or right click the selected row and click delete.



User Processing:

ClassMate User Management Module

Overview

Allows System Administrators to:

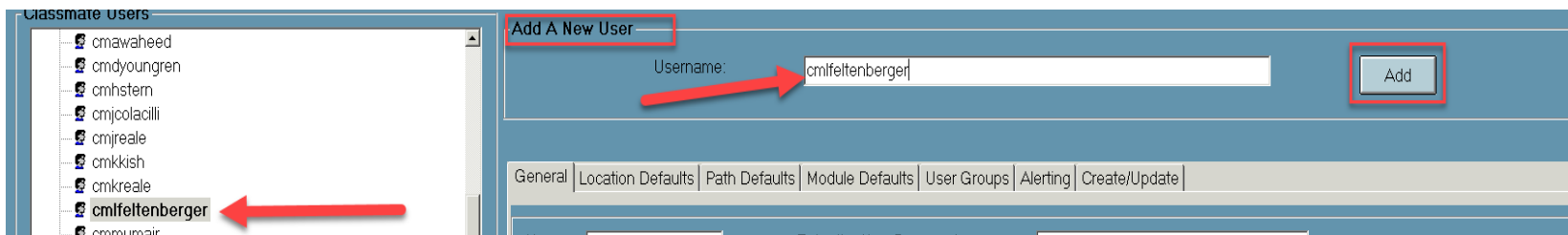
- Add or delete users
- Establish user default settings

Getting Started

- Double Click **Modules** > Double Click **System Administrator** > Single Click **ClassMate User Management**

Adding a New User

- Locate the **Add A New User** section of the page.
- Enter a username in the field.
- Click the blue **Add** button.
- Verify the username appears in the user list.



User Processing:

ClassMate User Management Module

General Tab

System Administrators can set user defaults from the bottom portion of the screen where new users are added or deleted.

- Highlight the specific user by clicking on the name in left column.
- The specific user name will appear in the **User** field.

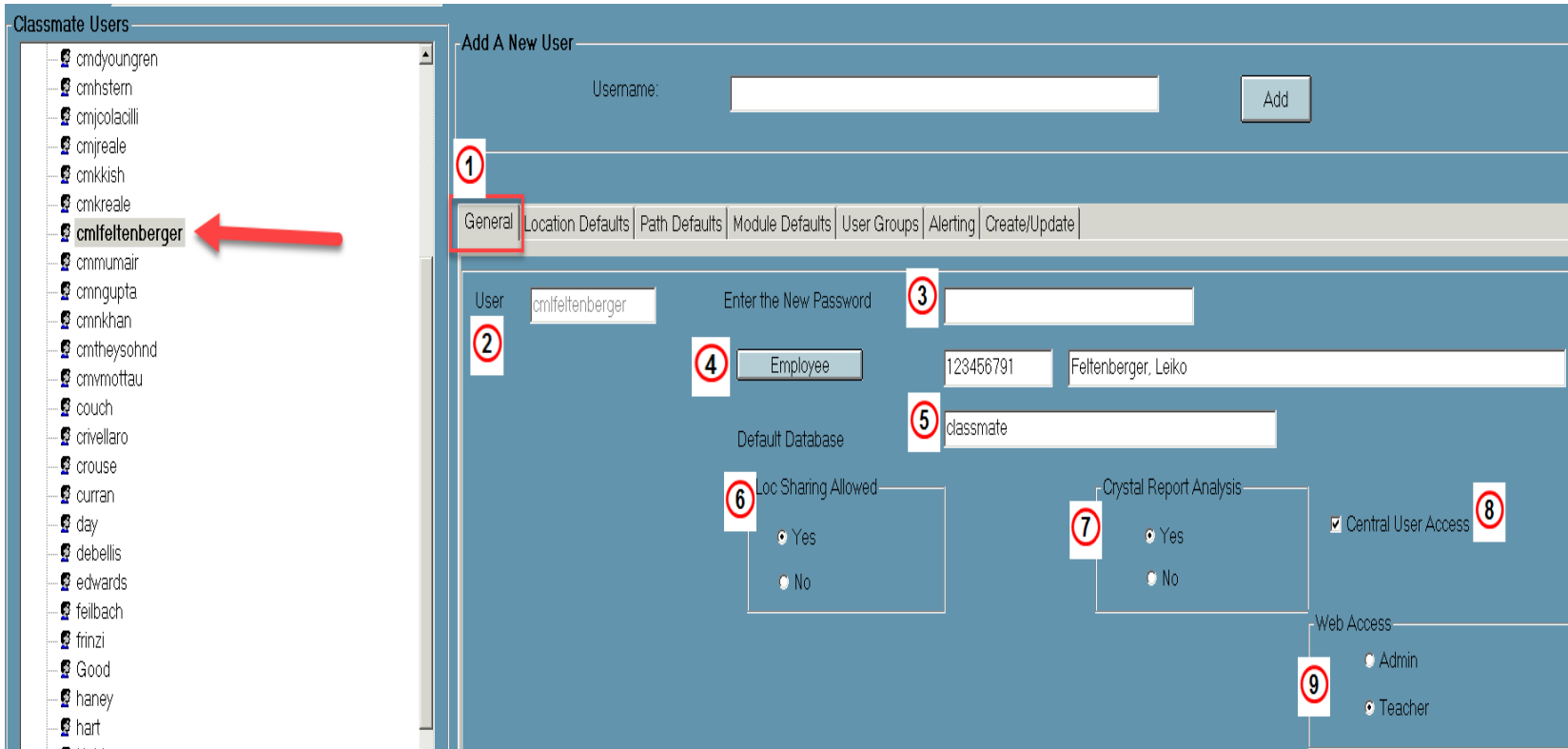
1. General Tab: Verify General Tab.
2. User: Verify username selected.
3. Password: Create or change selected user's password.
4. Employee Name: Select the employee name by clicking the blue **Employee** button. Highlight the associated employee by clicking on the name from the left column. Click the **select** button (green check mark icon on the toolbar).
5. Default Database: Typically set to ClassMate.
6. Loc Sharing Allowed: Defaults to No – Select Yes if user is allowed to view other locations
7. Crystal Report Analysis: Defaults to No – Select Yes to display Crystal Report Analysis button in Report Generation screen to view database tables report in report creation
8. Central User Access: Click to select if User should have access to ALL locations for site
9. Web Access: Defaults to Teacher – Select Admin if user should have Admin rights for accessing Admin Web Dashboard.



User Processing:

ClassMate User Management Module

General Tab



Classmate Users

- cmdyoungren
- cmhstern
- cmjcolacilli
- cmjreale
- cmkkish
- cmkreal
- cmfaltenberger**
- cmumair
- cmngupta
- cmnkhan
- cmtheysohnd
- cmvmottau
- couch
- crivellaro
- crouse
- curran
- day
- debellis
- edwards
- feilbach
- frinzi
- Good
- haney
- hart
- ...

Add A New User

Username:

1

General | Location Defaults | Path Defaults | Module Defaults | User Groups | Alerting | Create/Update

2 User: cmfaltenberger

3 Enter the New Password:

4 Employee: 123456791 Feltenberger, Leiko

5 Default Database:

6 Loc Sharing Allowed: Yes No

7 Crystal Report Analysis: Yes No

8 Central User Access

9 Web Access: Admin Teacher



User Processing:

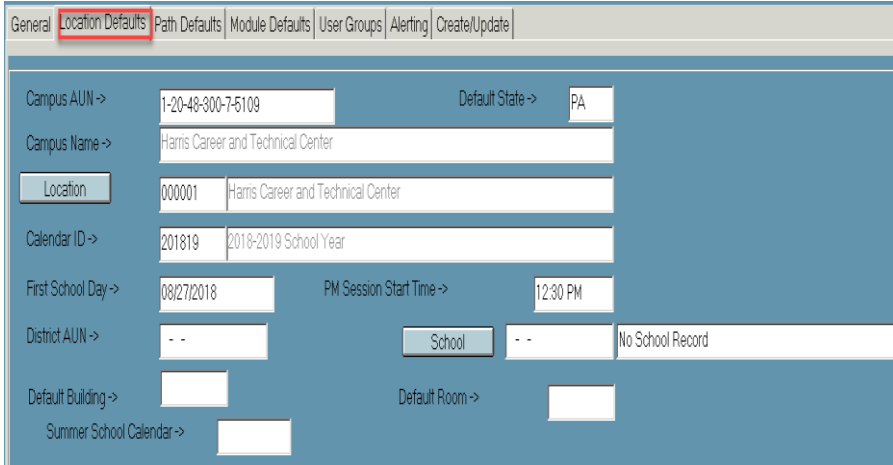
ClassMate User Management Module

Location Default Tab

Many of the fields may be populated from the employee selection process.

Populate any remaining fields as needed:

- Campus AUN
- Default State
- Location
- Calendar ID
- First School Day
- PM Session Start Time
- District AUN
- School
- Default Building
- Default Room
- Summer School Calendar



General **Location Defaults** Path Defaults Module Defaults User Groups Alerting Create/Update

Campus AUN -> 1-20-48-300-7-5109 Default State -> PA

Campus Name -> Harris Career and Technical Center

Location 000001 Harris Career and Technical Center

Calendar ID -> 201819 2018-2019 School Year

First School Day -> 08/27/2018 PM Session Start Time -> 12:30 PM

District AUN -> - - School - - No School Record

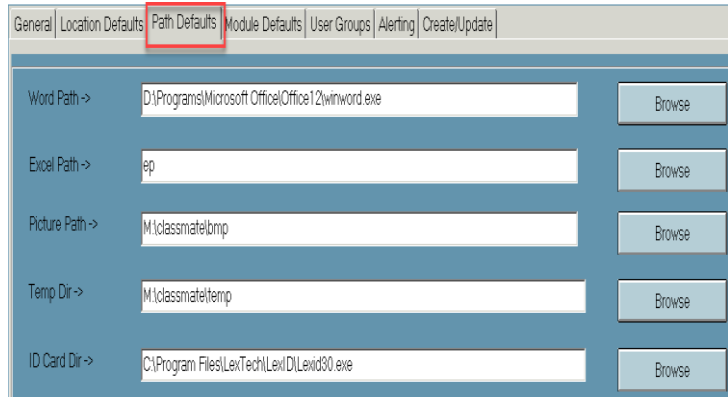
Default Building -> Default Room ->

Summer School Calendar ->

Path Defaults Tab

System Administrators to populate the following fields as needed by browsing to folder:

- Word Path
- Excel Path
- Picture Path: should display M:\classmate\bmp
- Temp Dir: should display M:\classmate\temp
- ID Card Dir: if hosted by ClassMate should be "HOSTED"



General Location Defaults **Path Defaults** Module Defaults User Groups Alerting Create/Update

Word Path -> D:\Programs\Microsoft Office\Office12\winword.exe Browse

Excel Path -> ep Browse

Picture Path -> M:\classmate\bmp Browse

Temp Dir -> M:\classmate\temp Browse

ID Card Dir -> C:\Program Files\LexTech\Lexi\DL\Lexid30.exe Browse

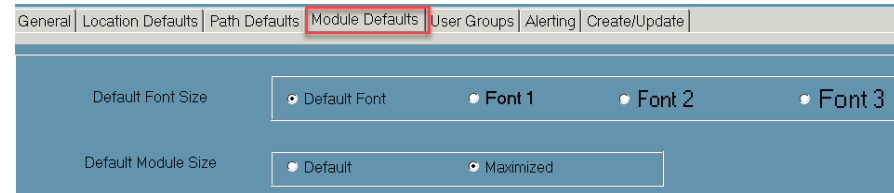


User Processing:

ClassMate User Management Module

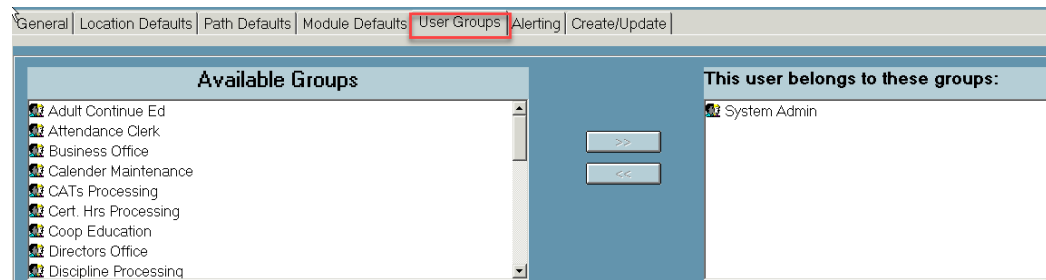
Module Defaults Tab

- Select a Default Font Size - e.g.: Font 2
- Select a Default Module Size - e.g.: Maximized



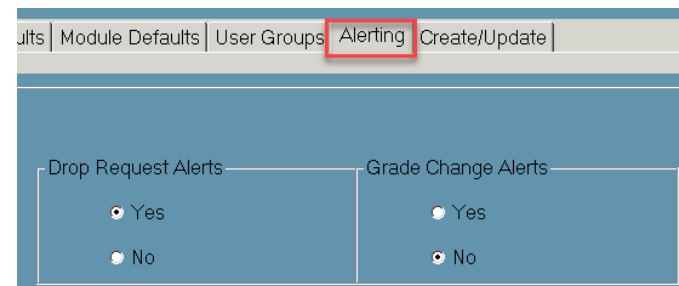
User Groups Tab

- Click on User Group from Available Groups in which to place user
- Click >> for select for assignment
- Click ALL if user is to be placed in all groups
- Click on the black disk icon to save
- A confirmation message will appear indicating “User Group assignments have been saved.”



Alerting Tab

- Drop Request Alerts – Defaults to No
Select Yes for user to receive a home page alert when teacher requests a student drop (if functionality enabled)
- Grade Change Alerts – Defaults to No
Select Yes for user to receive home page alert when grades are changed

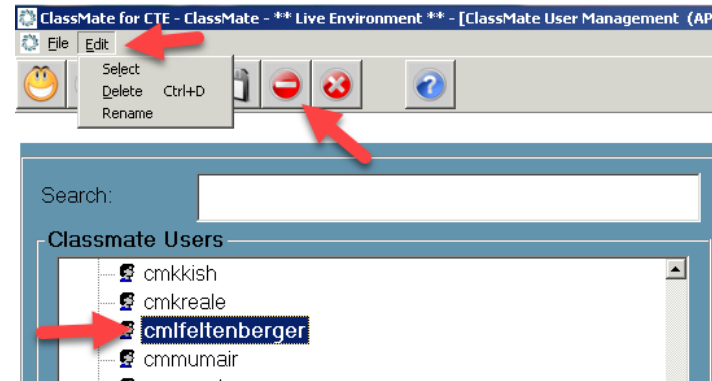


User Processing:

ClassMate User Management Module

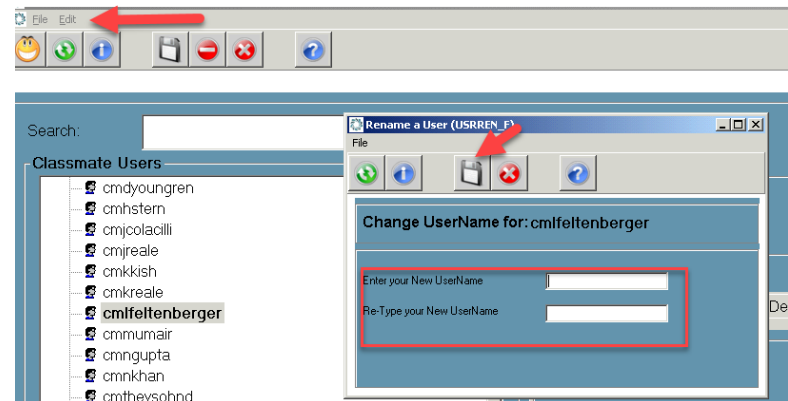
Delete an Existing User

- Select the user name from the list by clicking. The name will be highlighted.
- Click the **delete** button (red circle icon on the toolbar) or click the word **Edit** and click then click the word **Delete**.



Rename an Existing User

- Select the user name from the list by clicking. The name will be highlighted
- Click the word **Edit** and click the word **Rename** this will pop up a new Rename a User box
- Enter a **NEW** UserName in first field. Re-enter the **NEW** UserName in second field to confirm
- Click **Save** to complete update



User Processing:

User Module Management Module

Overview

Allows System Administrators to:

- Assign and/or Remove modules/reports/web pages tabs to groups/users

Getting Started

- Double Click **Modules** > Double Click **System Administrator** > Single Click **User Module Management**

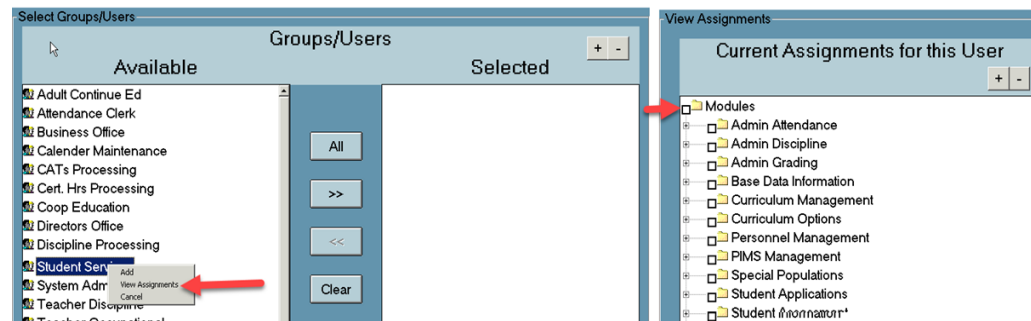
Established User Groups

To view modules/reports previously assigned to a user group/individual user:

- Right click the specific individual user or user group
- Select View Assignments
- Current assignments will display under the Modules/Reports portion of the screen.
Double click to expand categories to view specific modules/reports/web pages tabs



TIP:
Anywhere you see a + sign next to a folder means there are modules/reports assigned. Click the + sign to drill down to view or double click folder



NOTE: If you right click on a User Group, the modules/reports that you see are assigned to that User Group only (not necessarily the Users under that User Group as these might have been altered). The reason that the User Group can have it's own reports/modules assigned is so that as a user is placed in the User Group, they will get the already assigned modules for that Group. Once any User within the Group has additional modules added individually for that user – they now have different modules/reports than the rest of the Group – but the User Group's modules/reports itself does not get affected.

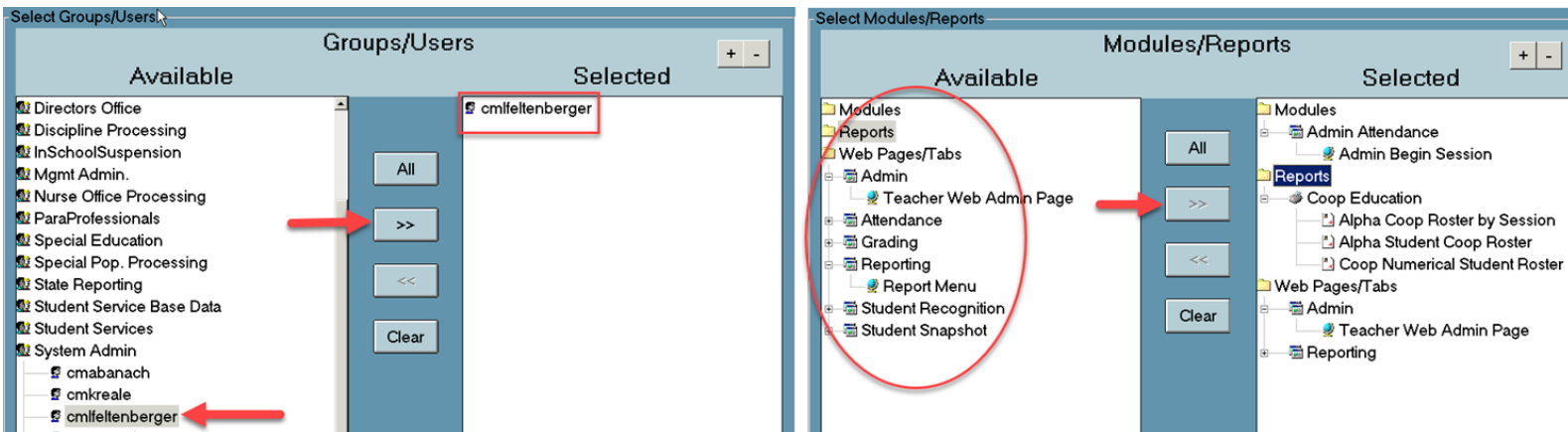
User Processing:

User Module Management Module

Assigning Modules/Reports/Web Pages Tabs to Groups or Individual Users

- Click on a User Group/Individual user from the available list on left of the screen to select
- Click >> to add the User Group/Individual user to the Selected list
- Double click the Modules, Reports, or Web Pages/Tabs folder from the Available Modules/Reports list to expand to see the options available
- Highlight the specific Module, Report or Web Page/Tab by single clicking
- Double Click or Click >> to add/move the module, report, or web page/tab to the Selected list
- Once all have been added, Click on the save icon to save
- A confirmation message will appear indicating “User module/report assignments have been saved”

**** For a user to have access to Teacher Web, specific “Pages/Tabs” must be assigned here first ****



The image displays two side-by-side screenshots of the user management interface. The left window, titled "Select Groups/Users", shows a list of "Available" groups/users on the left and a "Selected" list on the right. The user "cmfellenberger" is selected in the "Selected" list. The ">>" button is highlighted with a red arrow. The right window, titled "Select Modules/Reports", shows a list of "Available" modules/reports on the left and a "Selected" list on the right. The "Teacher Web Admin Page" is selected in the "Selected" list. The ">>" button is highlighted with a red arrow. A red circle highlights the "Web Pages/Tabs" folder in the "Available" list of the right window.



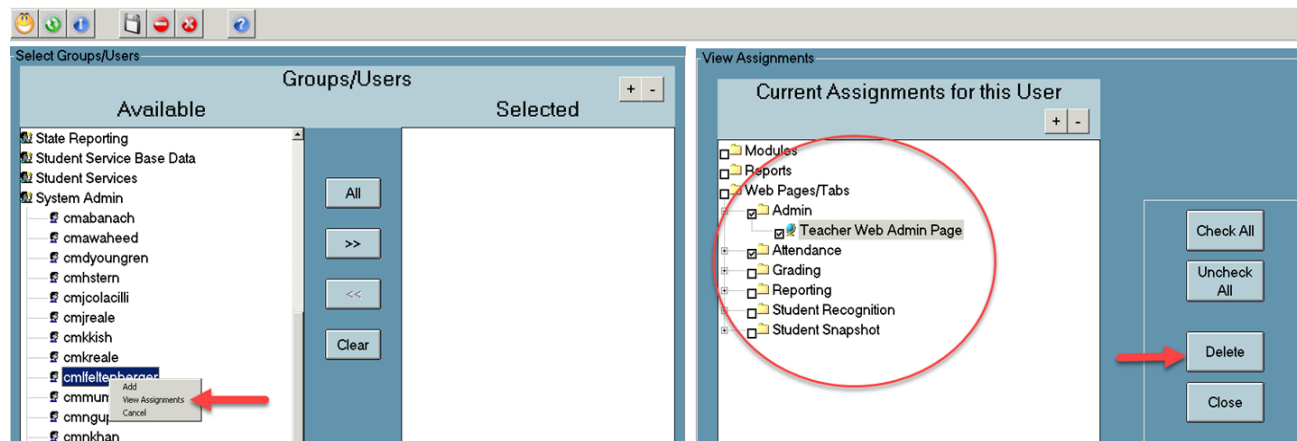
User Processing:

User Module Management Module

Deleting/Removing Modules/Reports/Web Pages/Tabs from User Groups or Individual Users

- Right click the specific User Group/Individual.
- Select View Assignments.
- Current assignments will display. Double click the Current Assignments folders to expand categories and view specific assigned modules/reports/web pages tabs
- Click specific Groups/Users from available
- Double click the Modules/Reports/Web Pages/Tabs folder
 - To remove an entire category click the box next to the Category folder
 - To remove individual modules/reports/web pages tabs click + to expand selection and click the box next to selection(s) you want to remove
- Can also use the Check All or Uncheck All buttons to assist in selections
- Click Delete to finish – this will remove any selected items
- A confirmation message will appear indicating “User module/report assignments have been saved”

If you are on a Group the Delete function will delete the selected module/report from all Users assigned to the Group selected



Training Database:

Training Database Refresh

Overview

Allows the System Administrator to copy the live data to the training database for a training session.

Getting Started

Double Click **My Modules** > Double Click **System Administrator** > Single Click **Database Activity Manager**

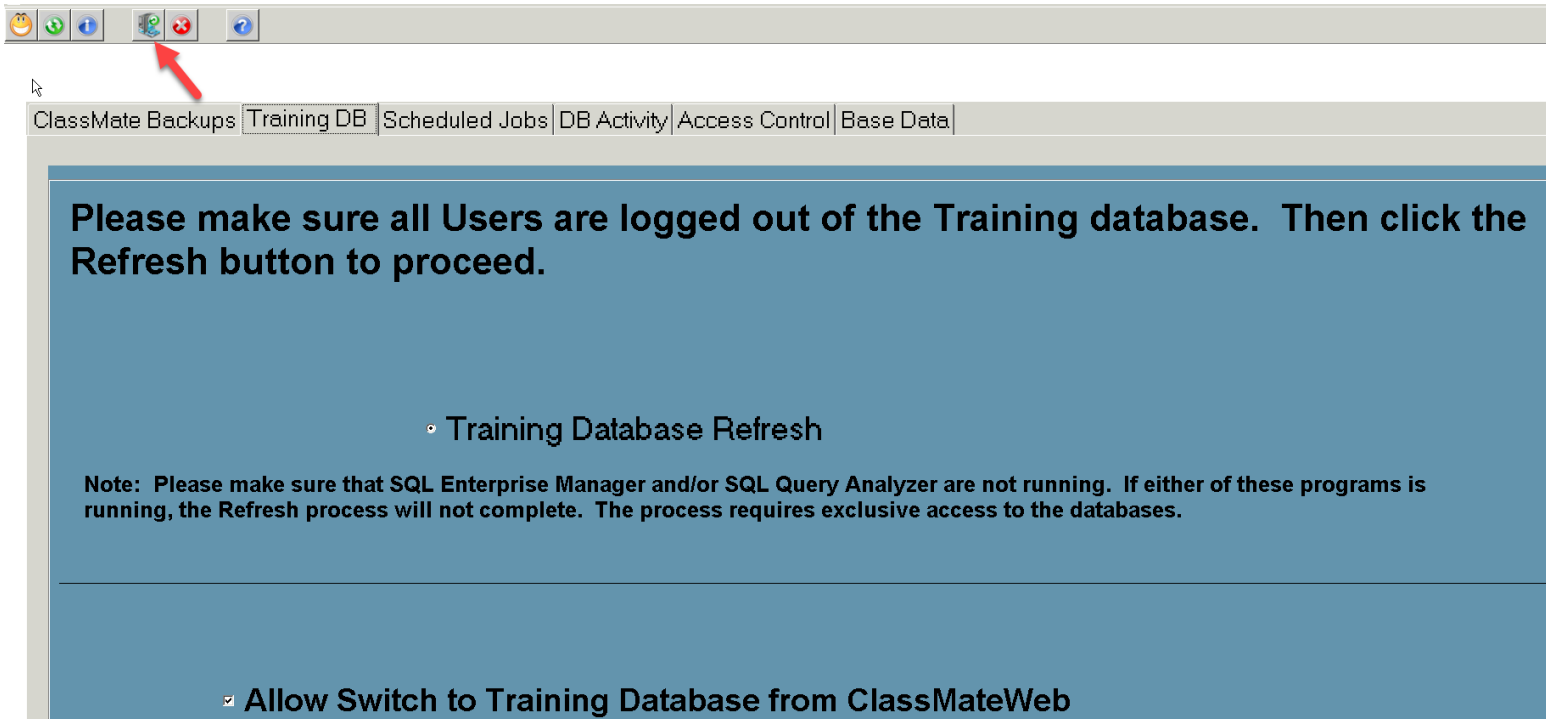


Training Database:

Training Database Refresh

Initiating the Training Database Refresh

- Click on the Training DB tab
- Make sure you review and follow the instructions on the screen
- Click the Refresh icon in the toolbar at the top
- When the refresh is complete you will get a message box indicating the refresh is complete
- Check “Allow Switch to Training Database from ClassMateWeb” to turn on Training in Web



ClassMate Backups | Training DB | Scheduled Jobs | DB Activity | Access Control | Base Data

Please make sure all Users are logged out of the Training database. Then click the Refresh button to proceed.

- Training Database Refresh

Note: Please make sure that SQL Enterprise Manager and/or SQL Query Analyzer are not running. If either of these programs is running, the Refresh process will not complete. The process requires exclusive access to the databases.

Allow Switch to Training Database from ClassMateWeb



Training Database:

ClassMate Training Database

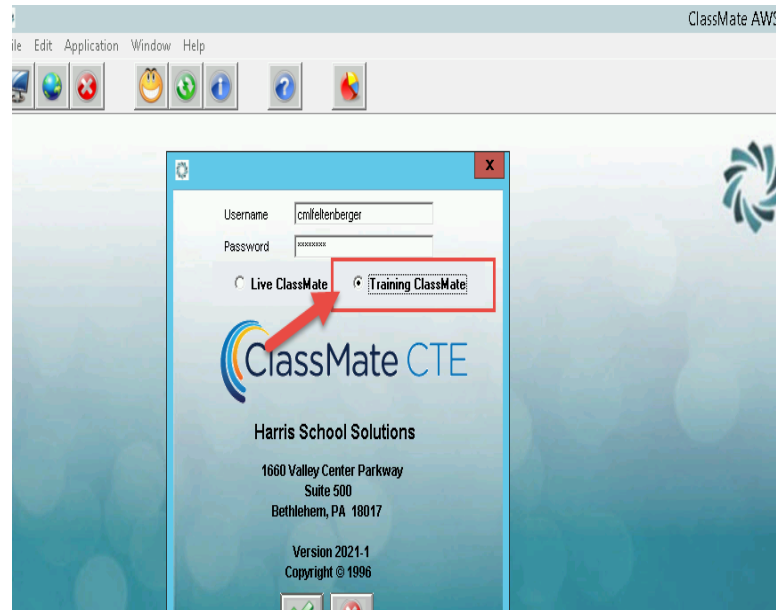
Overview

The purpose of the Training Database is to provide an environment for training while protecting the integrity of the data in the Live database.

The ClassMate Login screen looks the same way as it does when users are on the Live database.

To access the training Database users **MUST click to select Training ClassMate** at the ClassMate login Screen.

- By default the Data Source box displays ClassMate which is the Data Source to the Live database



Data Source:

- ✓ CM_Training = Training Database
- ✓ ClassMate = Live Database

ClassMate

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Questions? Contact us!
ClassMate Help Desk
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