

Job Aid: Managing Classes (Cohorts)

Purpose

The purpose of the Managing Classes (Cohorts) job aid is to guide you through the step-by-step process of creating and editing a class.

In this Job Aid, you will learn how to:

- Create and Configure a Class



Task A. Create and Configure a Class

Managing Classes (Cohorts): Adding

Note: Verify that the Admin tab is selected.

1. Navigate to **Learning > Classes**.
2. Click the **Add New** link.





3. Complete the **Class ID** and **Description** fields. **Note *** denotes required field.
4. Enter the Domain name in the **Domain** field. Click the **Search** icon to search for and select a domain if you do not know it.
5. Enter the title of the curriculum in the **Curriculum** field. Click the **Search** icon to search for and select a curriculum if you do not know the name.
6. Click the **Calendar** icons to select a **Start Date** and **End Date** for the class.
7. Click **Add**.

The screenshot shows the 'Add New Class' form. A red box highlights the 'Class ID' and 'Description' fields, with a callout '3'. Below, 'Domain' and 'Curriculum' fields have search icons. 'Max Size' is a numeric field. 'Start Date' and 'End Date' have calendar icons, with a callout '6'. At the bottom right, there are 'Add' and 'Reset' buttons, with a callout '7' pointing to the 'Add' button.

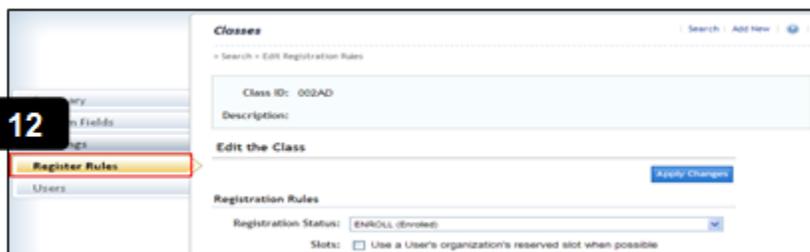
8. Navigate to **Offerings**.
9. Enter the **Scheduled Offering ID** if known and click **Add**.
Note: If the Scheduled Offering ID is unknown click the **add one or more from list** link to search for and select scheduled offerings to associate with the class.

The screenshot shows the 'Edit the Class' page. On the left, a navigation menu has 'Offerings' highlighted with a callout '8'. The main content area shows 'Class ID: 002AD' and 'Description:'. Below, there's a section 'Add a Scheduled Offering to the Class' with a callout '9' pointing to the 'Scheduled Offering ID' field. A link 'add one or more from list' is also visible. At the bottom right, there is an 'Add' button.

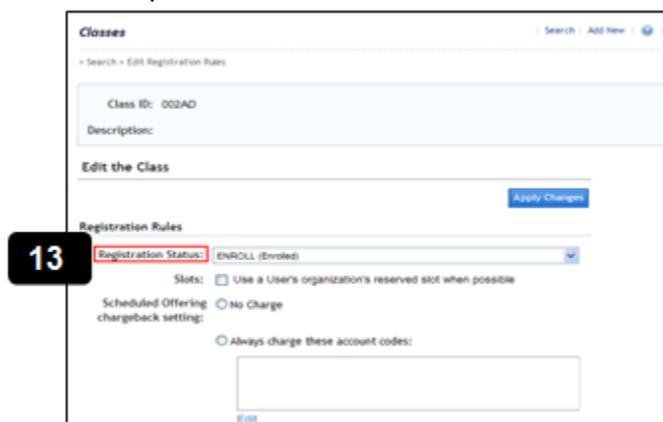
10. Select the desired course, and if you would like all users added to the class to be automatically enrolled in the offerings, click the **Auto Register** checkbox.
11. Click **Add**.



12. Navigate to **Register Rules**.



13. Select the registration status users should receive when auto-enrolled from the **Registration Status** drop-down menu.



14. Enable the **Withdraw Rules** by clicking the checkbox.
15. Select email **Notification Rules** to choose who will get an e-mail confirmation when someone enrolls or withdraws from the class. This is typically the user and supervisor.
16. Click **Apply Changes**.

When scheduled offering chargeback requires a User account code, use these account codes:

14 Withdraw Rules

15 Learning Plan: Remove associated items from Users' learning plans

Notification Rules **16**

Email confirmations to: User Instructor Supervisor Contacts

Apply Changes

17. Navigate to **Users**.
18. Click the **add one or more from list** link to search for and select users.

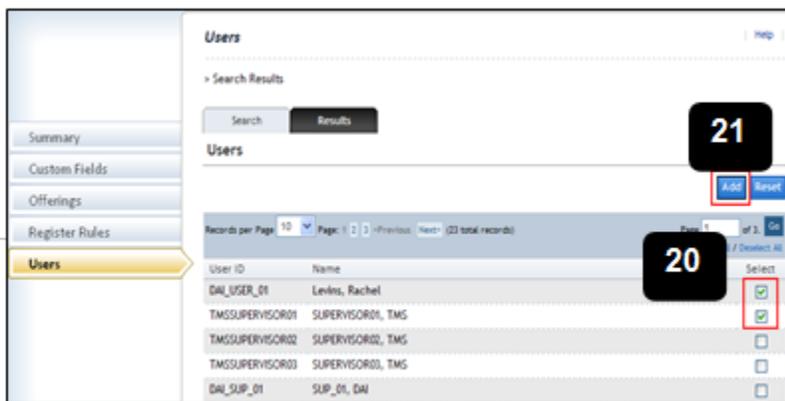
17 Users

18 add one or more from list

19. If known, enter the values for the search fields. If not, click **Search**.

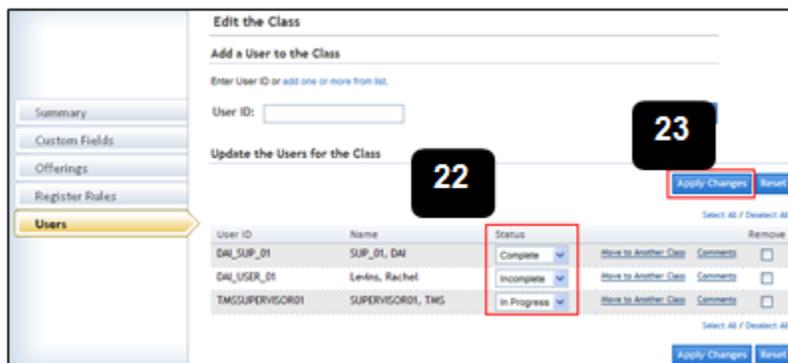


20. Click the **Select** checkbox to select the users you would like to add.
21. Click **Add**.



User ID	Name	Select
DAI_USER_01	Levins, Rachel	<input checked="" type="checkbox"/>
TMSUPERVISOR01	SUPERVISOR01, TMS	<input checked="" type="checkbox"/>
TMSUPERVISOR02	SUPERVISOR02, TMS	<input type="checkbox"/>
TMSUPERVISOR03	SUPERVISOR03, TMS	<input type="checkbox"/>
DAI_SUP_01	SUP_01, DAI	<input type="checkbox"/>

22. Once a user or users have been added to the class, you may manage their **Status**.
23. Select the appropriate status(es) and click **Apply Changes**.



User ID	Name	Status	Remove
DAI_SUP_01	SUP_01, DAI	Complete	<input type="checkbox"/>
DAI_USER_01	Levins, Rachel	Incomplete	<input type="checkbox"/>
TMSUPERVISOR01	SUPERVISOR01, TMS	In Progress	<input type="checkbox"/>