

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

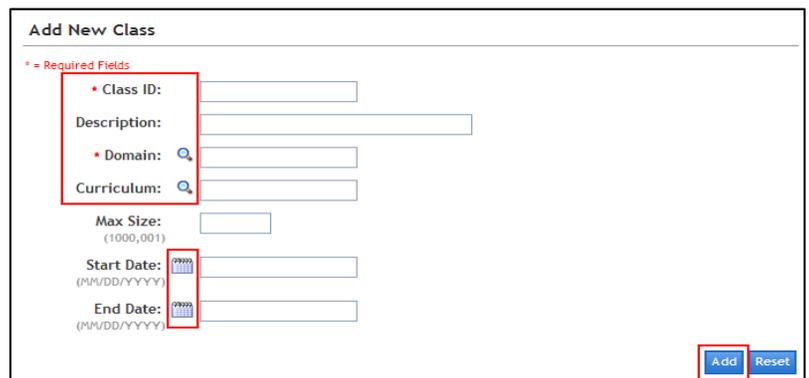
Managing Classes (Cohorts): Adding

Note: Verify that the Admin tab is selected.

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

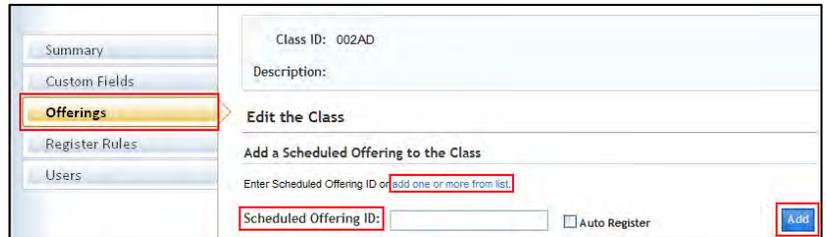


3. Complete the **Class ID** and **Description** fields. **Note *** denotes required field.
4. Enter the Domain name in the **Domain** field. Click the **Search** icon to search for and select a domain if you do not know it.
5. Enter the title of the curriculum in the **Curriculum** field. Click the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

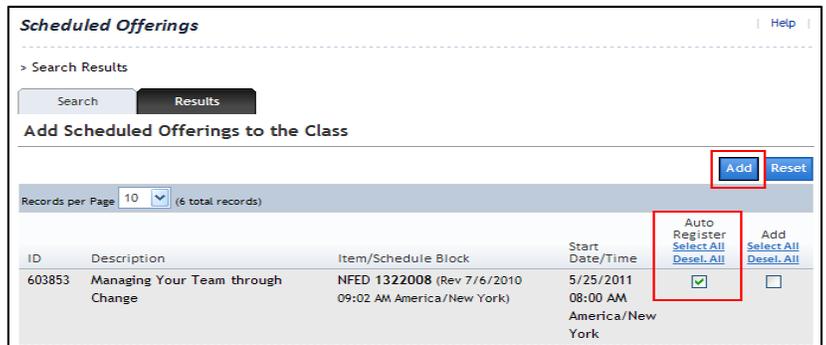


8. Navigate to **Offerings**.
9. Enter the **Scheduled Offering ID** if known and click **Add**.

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.



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**.

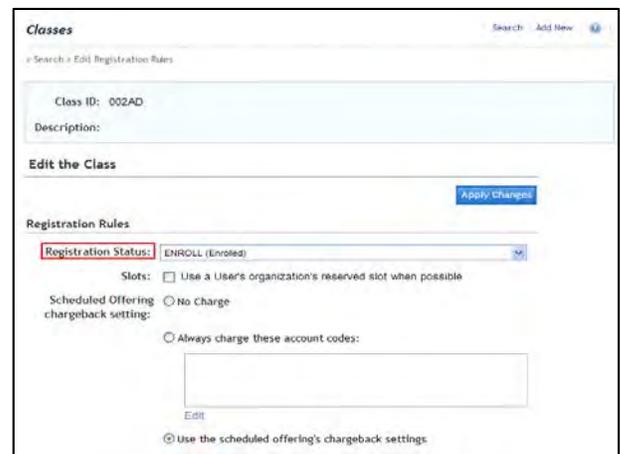


ID	Description	Item/Schedule Block	Start Date/Time	Auto Register	Add
603853	Managing Your Team through Change	NFED 1322008 (Rev 7/6/2010 09:02 AM America/New York)	5/25/2011 08:00 AM America/New York	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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:

[Edit](#)

Withdraw Rules

Learning Plan: Remove associated items from Users' learning plans

Notification Rules

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.

Summary

Custom Fields

Offerings

Register Rules

Users

Classes Search Add New

> Search > Edit Users

Class ID: 002AD

Description:

Edit the Class

Add a User to the Class

Enter User ID of [add one or more from list](#)

User ID: [Add](#)

Update the Users for the Class

There are no Users in this class.

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

Summary

Custom Fields

Offerings

Register Rules

Users

Search Results

Search Users

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

[Search](#) [Reset](#)

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Profile Status: Active Expired Both

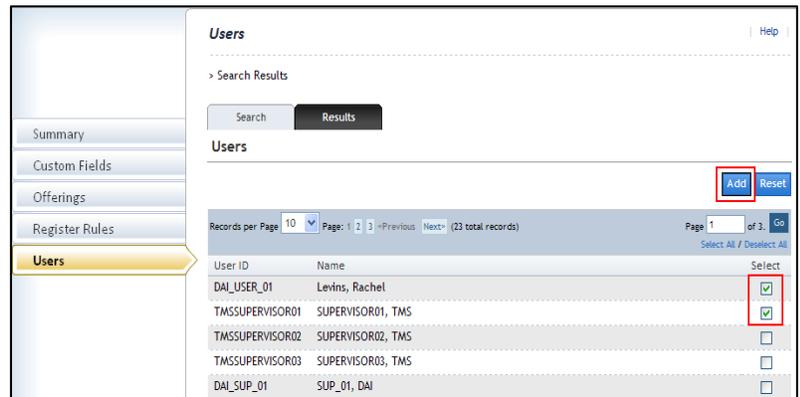
Hire Date After: (MM/DD/YYYY)

Hire Date Before: (MM/DD/YYYY)

Domains: Starts With

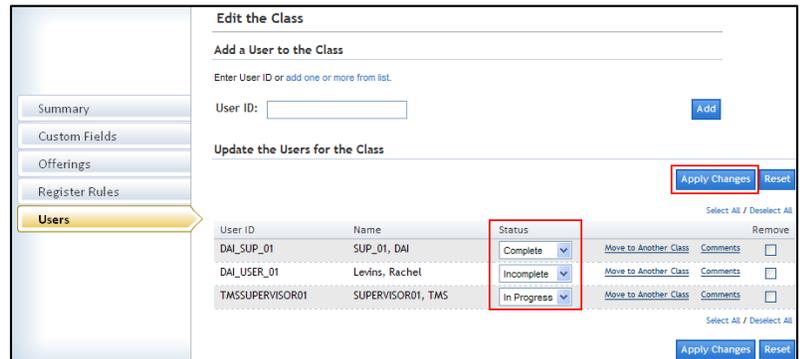
[Add/Remove Criteria](#) [Search](#) [Reset](#)

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"/>
TMSSUPERVISOR01	SUPERVISOR01, TMS	<input checked="" type="checkbox"/>
TMSSUPERVISOR02	SUPERVISOR02, TMS	<input type="checkbox"/>
TMSSUPERVISOR03	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**. The available statuses are:
 - a. Complete
 - b. Incomplete
 - c. In progress
23. Select the appropriate statuses 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"/>
TMSSUPERVISOR01	SUPERVISOR01, TMS	In Progress	<input type="checkbox"/>