

This document explains the usage of the MRSware Education Module. Topics covered include data management, searching, reporting and class assignment.

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Education Module

The Education Module allows you to manage classrooms, teachers, students and their assignments to classes. Reports are provided that display one of these item's data and schedule information. Advanced type and category management as well as search options are available for each data item in the module.

Teachers

Overview

In MRSware, the Teacher data item is used to identify which contacts in the system are teachers and can thus be assigned to classes. The data fields that comprise a teacher are described below in Table 1.

Field Name	Description
Contact	The system contact representing the teacher
Type	A user defined field that describes the teacher's role or status (more info)
Number	A free form number or code used to represent the teacher

Hire Date	The date the teacher was hired or began teaching
Discharge Date	The date the teacher was no longer employed by your organization
Categories	A user defined list that can be used to label each teacher (more info)
Notes	A free form text field
Classes	The classes to which the teacher is assigned

Table 1 – teacher data fields

Managing

The main teacher table (Figure 1) can be accessed from the *Teachers* icon in the *Shortcuts* panel or from the main menu by navigating to *Go To → Education → Teachers*. This is a standard MRSware data table whose options are available under the *Teacher* menu, in the main button bar directly below the main menu and by right clicking on the table. The options available are described below in Table 2.

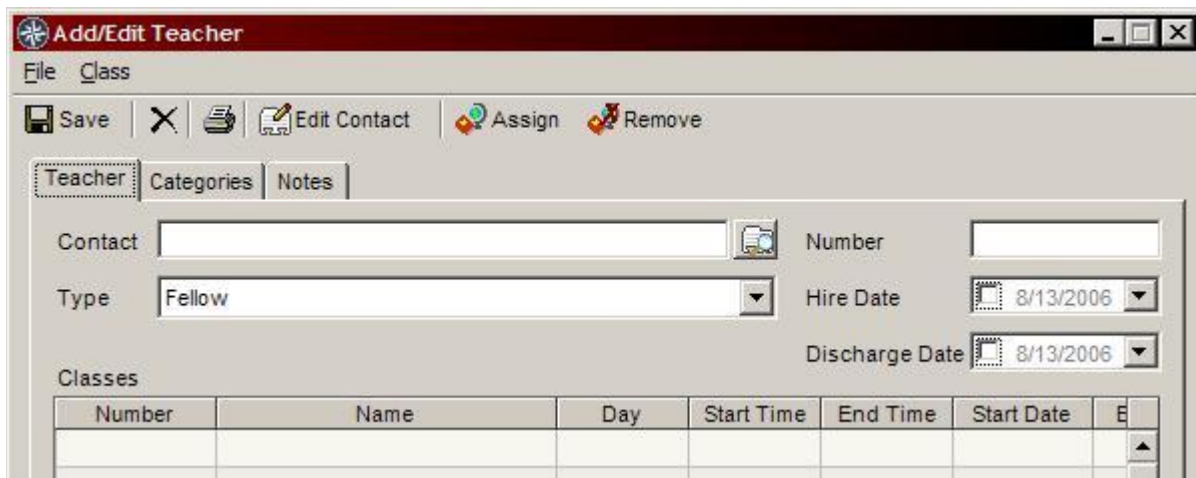


Figure 1 – teacher data table

Field Name	Description
New	Loads a blank Add/Edit Teacher dialog
Edit	Loads the selected teacher in the Add/Edit Teacher dialog
Delete	Removes the selected teacher(s) from the system
Edit Contact	Loads the selected teacher's contact in the Add/Edit Contact dialog
Print Schedule	Runs the <i>Teacher Schedule</i> report for the selected teacher (more info)

Table 2 – teacher data table options

The Add/Edit Teacher dialog (Figure 2) is the primary way teachers are added to the system. This dialog allows you to modify all the fields described in Table 1. Along with the options outlined in Table 2, this screen also allows you to add or remove class assignments to this teacher. To assign this teacher to a class, click the *Assign* button or right click on the *Classes* table and choose *Assign Existing*. This will load the Class Chooser dialog shown in Figure 17. See the [Class Assignment](#) section below for more information about this dialog. To remove the teacher from classes, simply highlight the classes desired and click the Remove button or right click on the table and choose *Remove*.



The **Add/Edit Teacher** dialog box features a menu bar with **File** and **Class**. Below the menu bar is a toolbar with icons for **Save**, **Edit Contact**, **Assign**, and **Remove**. The dialog has three tabs: **Teacher** (selected), **Categories**, and **Notes**. The **Teacher** tab contains the following fields:

- Contact**: A text input field.
- Type**: A dropdown menu with **Fellow** selected.
- Number**: A text input field.
- Hire Date**: A date picker showing **8/13/2006**.
- Discharge Date**: A date picker showing **8/13/2006**.

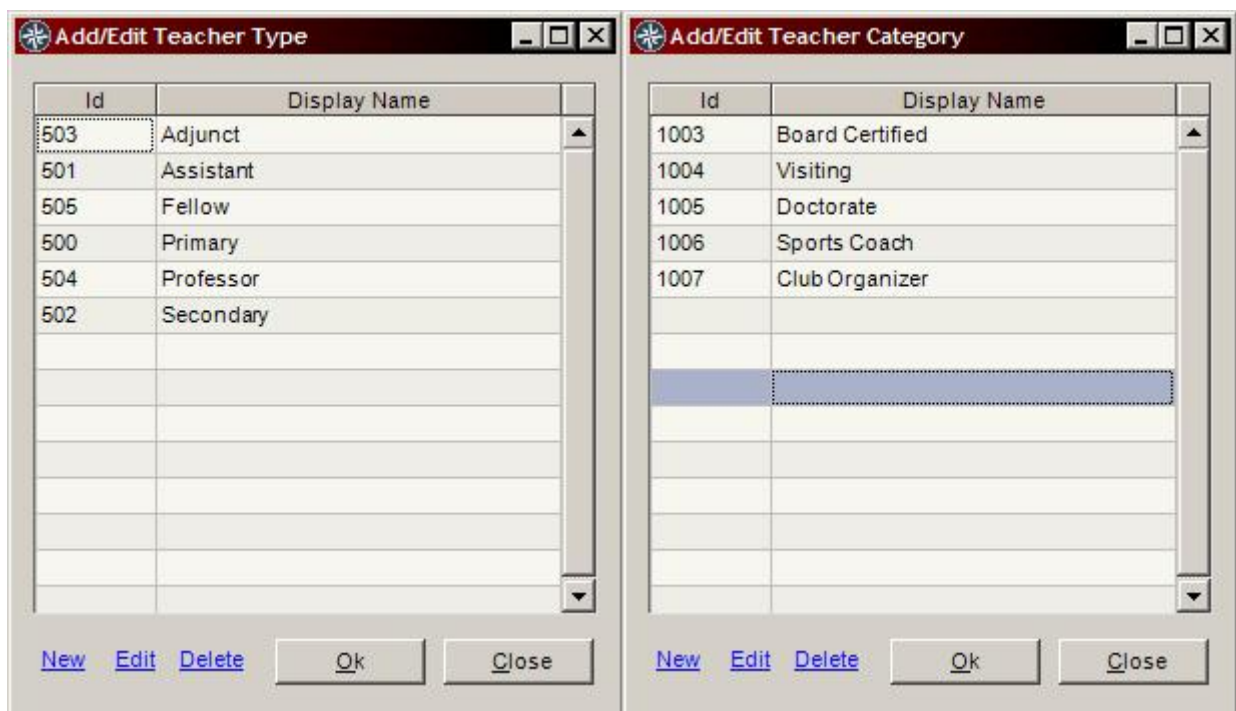
Below these fields is a **Classes** section with a table:

Number	Name	Day	Start Time	End Time	Start Date	End Date

Figure 2 – the Add/Edit Teacher dialog

Types and Categories

The teacher types and categories described in Table 1 are user-defined fields that help describe and label the teachers in the system. To modify these fields, navigate to *Go To → Education → Manage → Teacher Types* or *Teacher Categories*. The corresponding Add/Edit dialog shown in Figure 3 will display; these are standard dialogs that allow you to Add, Edit or Delete items by using the links in the bottom left of the screen.



The figure shows two side-by-side dialog boxes: **Add/Edit Teacher Type** and **Add/Edit Teacher Category**. Both dialogs have a table with **Id** and **Display Name** columns.

Add/Edit Teacher Type table:

Id	Display Name
503	Adjunct
501	Assistant
505	Fellow
500	Primary
504	Professor
502	Secondary

Add/Edit Teacher Category table:

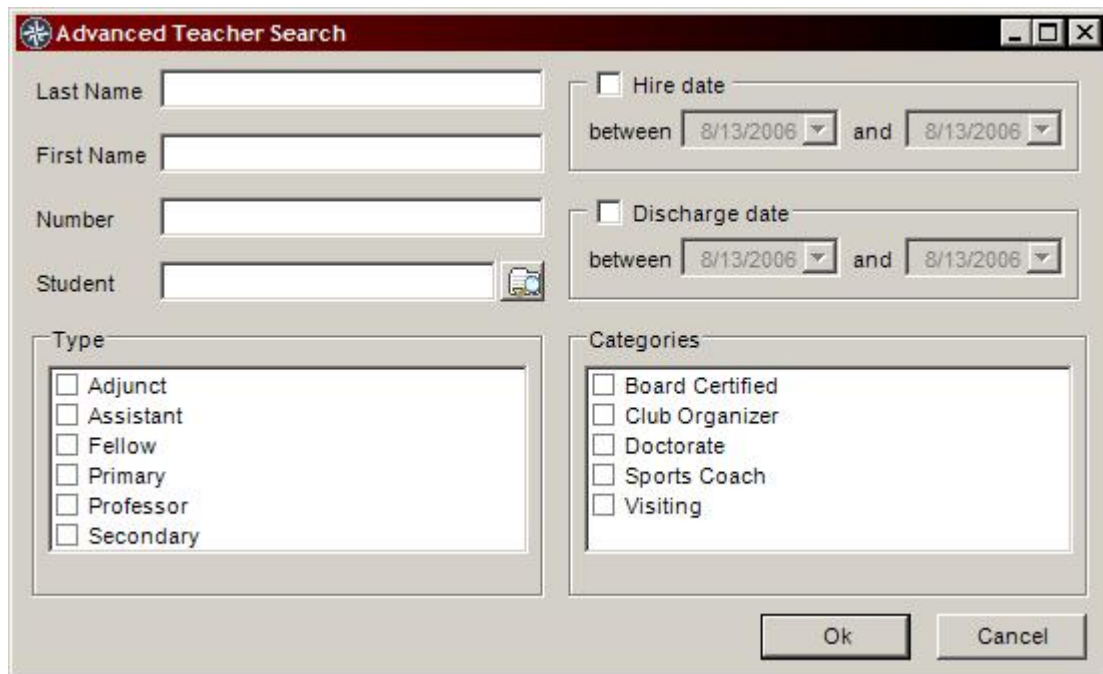
Id	Display Name
1003	Board Certified
1004	Visiting
1005	Doctorate
1006	Sports Coach
1007	Club Organizer

Both dialogs have buttons at the bottom: **New**, **Edit**, **Delete**, **Ok**, and **Close**.

Figure 3 – the Add/Edit Teacher Type and Category dialogs

Searching

An advanced searching mechanism is provided to locate teachers by common criteria that they share. To access the Advanced Teacher Search dialog (Figure 4), navigate to *Search → Teachers*. To use this screen, simply enter the data into the fields you wish to search on and click the **OK** button. Multiple fields are brought together using “AND” logic meaning that if two or more search values are entered, matching teachers must match all values. The matching teachers, if any, will display in the main Teacher table (Figure 1). The available search fields are described below in Table 3.



The image shows a software dialog box titled "Advanced Teacher Search". It contains several input fields and checkboxes. On the left, there are four text boxes labeled "Last Name", "First Name", "Number", and "Student". Below these is a "Type" section with a list of checkboxes: Adjunct, Assistant, Fellow, Primary, Professor, and Secondary. On the right, there are two date range sections. The first is labeled "Hire date" with a checkbox and two date pickers set to "8/13/2006", with the word "between" in between. The second is labeled "Discharge date" with a checkbox and two date pickers also set to "8/13/2006", with the word "between" in between. Below these is a "Categories" section with a list of checkboxes: Board Certified, Club Organizer, Doctorate, Sports Coach, and Visiting. At the bottom right are "Ok" and "Cancel" buttons.

Figure 4 – the Advanced Teacher Search dialog

Field Name	Description
Last Name	Searches the last name field of the Contact assigned to the teacher. Wild cards are permitted; for example, entering <i>*derson</i> will match <i>Anderson</i> , <i>Henderson</i> , etc
First Name	Searches the first name field of the Contact assigned to the teacher. Wild cards are permitted; for example, entering <i>Joh*</i> will match <i>John</i> , <i>Johnny</i> , <i>Johna</i> , but not <i>Josh</i>
Number	Searches the number field on the teacher, wild cards are permitted
Type	Searches the type field on the teachers in an "OR" fashion; any teachers of any of the checked Types are returned
Hire Date	Returns teachers whose hire date is between the two dates
Discharge Date	Returns teachers whose discharge date is between the two dates
Categories	Searches teachers' assigned categories in an "OR" fashion; any teacher assigned any of the checked categories is returned
Student	Allows you to select teachers assigned to the given student(s). A teacher is "assigned" to a student if they are both scheduled in a class.

Table 3 – searchable teacher fields

Reports

Two Teacher-related reports are available for viewing and printing. The first, *Teacher Schedule* is accessible from the main Teacher table (Figure 1), the Add/Edit Teacher dialog (Figure 2), and the *Report Explorer* located in the *Shortcuts* panel. When run from the teacher table or dialog, the report is automatically set to the selected teacher. When run from the Report Explorer, however, the desired teacher must be selected from a list. Once a teacher is selected, the report will display the teacher's contact information and what classes they are currently assigned to. The second report, *Teacher Listing*, is only accessible from the report explorer and lists the same information as *Teacher Schedule* but for all teachers in the system.

Students

Overview

In MRSware, the Student data item is used to identify which contacts in the system are students and can thus be assigned to classes. The data fields that comprise a student are described below in Table 4.

Field Name	Description
Contact	The system contact representing the student
Type	A user defined field that describes the student's status (more info)
Number	A free form number or code used to represent the student
Emergency Info	A free form text field that can be used to store instructions in case of an emergency occurs.
Enrollment Date	The date the student was first signed up to attend
Completion Date	The date the student graduated or left the school
Categories	A user defined list that can be used to label each student (more info)
Grade Level	A number representing the student's grade or class level
Age	The student's age as calculated from the birthday of the assigned contact
Notes	A free form text field
Classes	The classes to which the student is assigned

Table 4 – student data fields

Managing

The main student table (Figure 5) can be accessed from the *Students* icon in the *Shortcuts* panel or from the main menu by navigating to *Go To → Education → Students*. This is a standard MRSware data table whose options are available under the *Student* menu, in the main button bar directly below the main menu and by right clicking on the table. The options available are described below in Table 5.

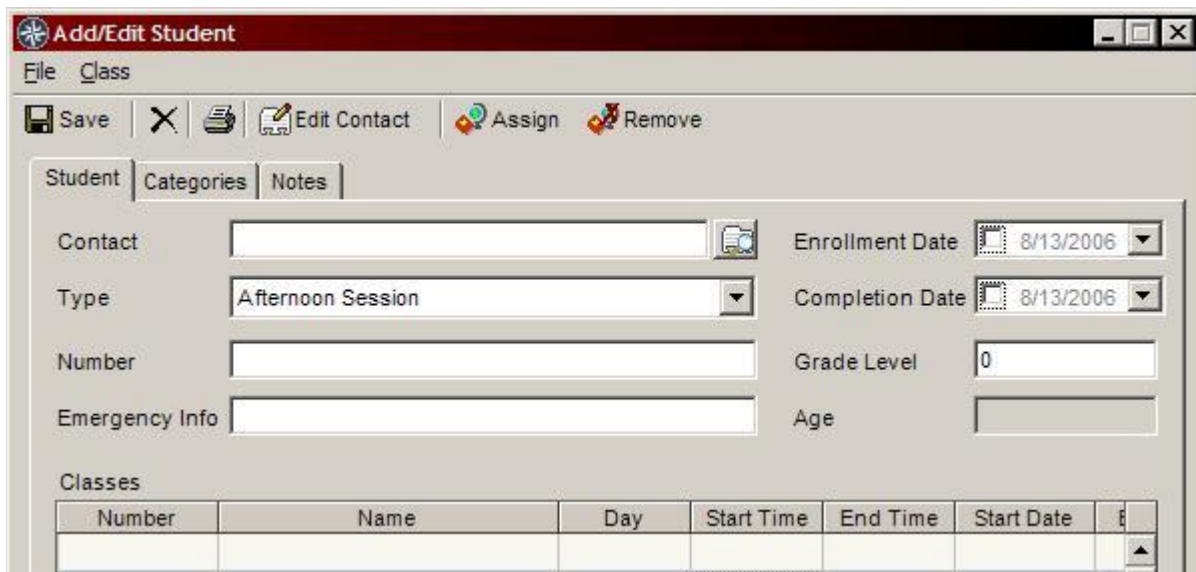
Number	Name	Type	Grade Level	Enrollment Date	Completion Date	Emergency Info
13	Doe, John	Day Student	5	09/22/2005		call 555-333-4444

Figure 5 – student data table

Field Name	Description
New	Loads a blank Add/Edit Student dialog
Edit	Loads the selected student in the Add/Edit Student dialog
Delete	Removes the selected student(s) from the system
Edit Contact	Loads the selected student's contact in the Add/Edit Contact dialog
Print Schedule	Runs the <i>Student Schedule</i> report for the selected student (more info)

Table 5 – student data table options

The Add/Edit Student dialog (Figure 6) is the primary way students are added to the system. This dialog allows you to modify all the fields described in Table 4. Along with the options outlined in Table 5, this screen also allows you to add or remove class assignments to this student. To assign this student to a class, click the *Assign* button or right click on the *Classes* table and choose *Assign Existing*. This will load Class Chooser dialog shown in Figure 17. See the [Class Assignment](#) section below for more information about this dialog. To remove the student from classes, simply highlight the classes desired and click the *Remove* button or right-click on the table and choose *Remove*.



The **Add/Edit Student** dialog box features a menu bar with **File** and **Class**. Below the menu bar is a toolbar with icons for **Save**, **Cancel**, **Print**, **Edit Contact**, **Assign**, and **Remove**. The main area has three tabs: **Student** (selected), **Categories**, and **Notes**. The **Student** tab contains the following fields:

- Contact**: Text input field with a calendar icon.
- Type**: Dropdown menu showing "Afternoon Session".
- Number**: Text input field.
- Emergency Info**: Text input field.
- Enrollment Date**: Calendar icon and date field showing "8/13/2006".
- Completion Date**: Calendar icon and date field showing "8/13/2006".
- Grade Level**: Text input field showing "0".
- Age**: Text input field.

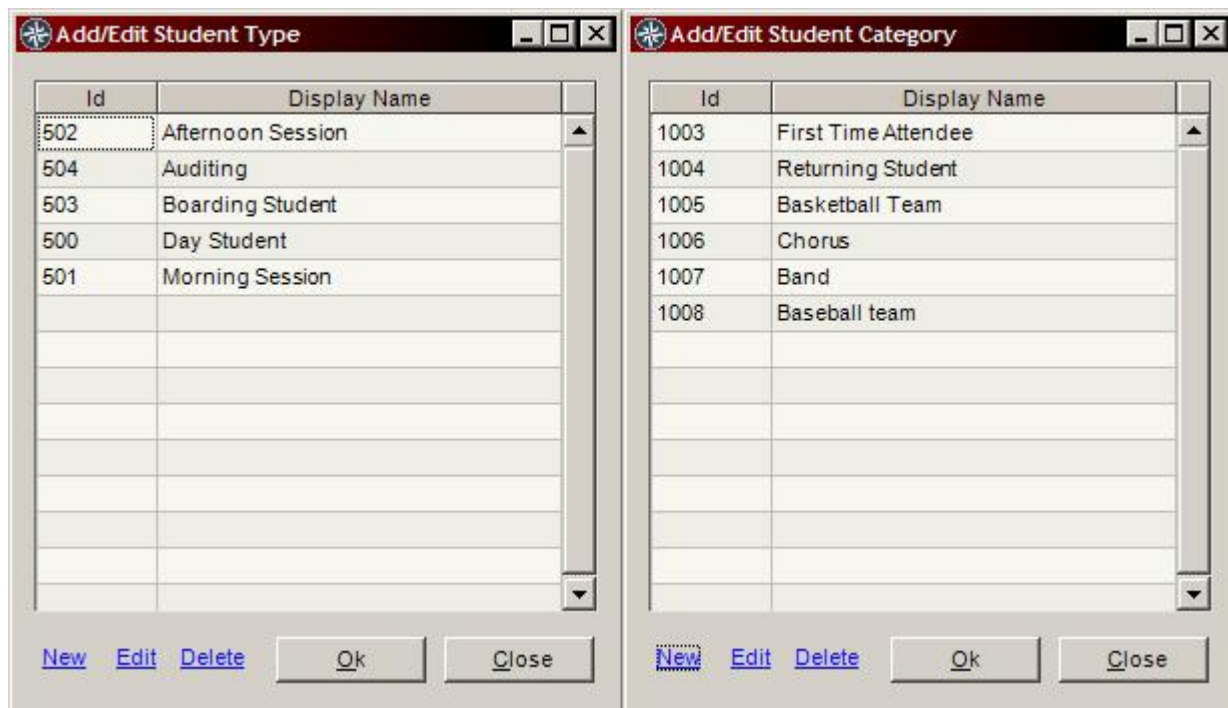
Below these fields is a **Classes** section with a table:

Number	Name	Day	Start Time	End Time	Start Date	

Figure 6 – the Add/Edit Student dialog

Types and Categories

The student types and categories described in Table 4 are user-defined fields that help describe and label the students in the system. To modify these fields, navigate to *Go To → Education → Manage → Student Types/Student Categories*. The corresponding Add/Edit dialog shown in Figure 3 will display; these are standard dialogs that allow you to Add, Edit or Delete items by using the links in the bottom left of the screen.



The figure shows two side-by-side dialog boxes: **Add/Edit Student Type** and **Add/Edit Student Category**.

Add/Edit Student Type dialog box:

Id	Display Name
502	Afternoon Session
504	Auditing
503	Boarding Student
500	Day Student
501	Morning Session

Add/Edit Student Category dialog box:

Id	Display Name
1003	First Time Attendee
1004	Returning Student
1005	Basketball Team
1006	Chorus
1007	Band
1008	Baseball team

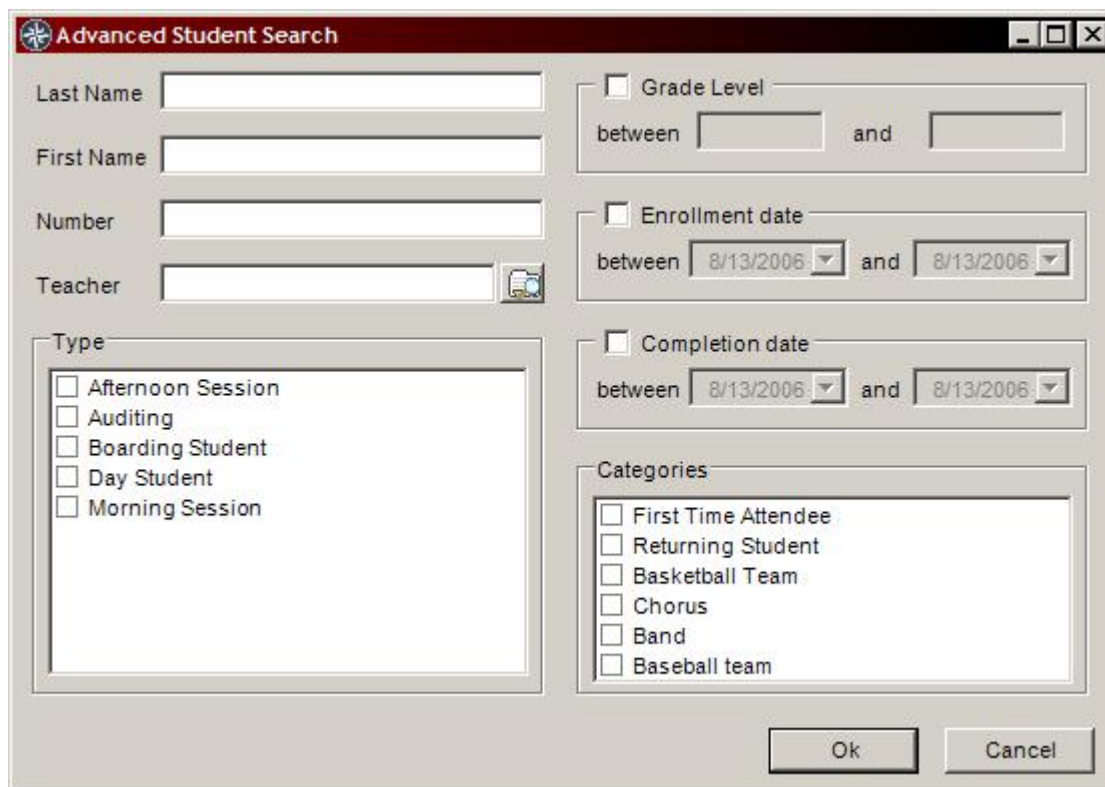
Both dialogs have a bottom section with links: **New**, **Edit**, **Delete**, **Ok**, and **Close**.

Figure 7 – the Add/Edit Student Type and Category dialogs

Searching

An advanced searching mechanism is provided to locate students by common criteria that they share. To open the Advanced Student Search dialog (Figure 8), navigate to *Search → Students*. To use this screen, simply enter the data into the fields you wish to search on and click the **OK** button. Multiple fields are

brought together using “AND” logic meaning that if two or more search values are entered, matching teachers must match all values. The matching students, if any, will display in the main Student table (Figure 4). The available search fields are described below in Table 6.



The image shows a software dialog box titled "Advanced Student Search". It contains several search criteria sections:

- Text Fields:** Last Name, First Name, Number, and Teacher (with a small icon next to it).
- Grade Level:** A checkbox followed by "between" and two empty text boxes, and "and" followed by another empty text box.
- Enrollment date:** A checkbox followed by "between" and two date pickers (showing 8/13/2006), and "and" followed by another date picker (showing 8/13/2006).
- Completion date:** A checkbox followed by "between" and two date pickers (showing 8/13/2006), and "and" followed by another date picker (showing 8/13/2006).
- Type:** A list box containing:
 - ☐ Afternoon Session
 - ☐ Auditing
 - ☐ Boarding Student
 - ☐ Day Student
 - ☐ Morning Session
- Categories:** A list box containing:
 - ☐ First Time Attendee
 - ☐ Returning Student
 - ☐ Basketball Team
 - ☐ Chorus
 - ☐ Band
 - ☐ Baseball team
- Buttons:** "Ok" and "Cancel" at the bottom right.

Figure 8 – the Advanced Student Search dialog

Field Name	Description
Last Name	Searches the last name field of the Contact assigned to the student. Wild cards are permitted; for example, entering <i>*erson</i> will match <i>Anderson</i> , <i>Henderson</i> , etc
First Name	Searches the first name field of the Contact assigned to the student. Wild cards are permitted; for example, entering <i>Joh*</i> will match <i>John</i> , <i>Johnny</i> , <i>Johna</i> , but not <i>Josh</i>
Number	Searches the number field on the student, wild cards are permitted
Type	Searches the type field on the students in an “OR” fashion; any students of any of the checked Types are returned
Grade Level	Returns students whose grade level is between the two values
Enrollment Date	Returns students whose enrollment date is between the two dates
Completion Date	Returns students whose completion date is between the two dates
Categories	Searches students’ assigned categories in an “OR” fashion; any student assigned any one of the checked categories is returned
Teacher	Allows you to select students assigned to the given teacher(s). A teacher is “assigned” to a student if they are both scheduled in a class.

Table 6 – searchable student fields

Reports

One Student-related report is available for viewing and printing. *Student Schedule* is accessible from the main Student table (Figure 5), the Add/Edit Student dialog (Figure 6) and the *Report Explorer* located in the *Shortcuts* panel. When run from the student table or dialog, the report automatically is set to the

selected student. When run from the Report Explorer, however, the desired student must be selected from a list. Once a student is selected, the report will display the student's contact information and what classes they are currently assigned to.

Classrooms

Overview

In MRSware, the Classroom data item is used to represent the various locations in which a class can be held. The data fields that comprise a classroom are described below in Table 7.

Field Name	Description
Name	The main description of the classroom
Type	A user defined field that describes the classroom's features (more info)
Number	A free form number or code used to represent the classroom
Occupancy	The maximum number of students that can be assigned to the classroom
Location	A free form field describing where the classroom can be found
Categories	A user defined list that can be used to label each classroom (more info)
Notes	A free form text field
Classes	The classes that are assigned to the classroom

Table 7 – classroom data fields

Managing

The main classroom table (Figure 9) can be accessed from the *Classrooms* icon in the *Shortcuts* panel or from the main menu by navigating to *Go To → Education → Classrooms*. This is a standard MRSware data table whose options are available under the *Classroom* menu, in the main button bar directly below the main menu and by right-clicking on the table. The options available are described below in Table 8.

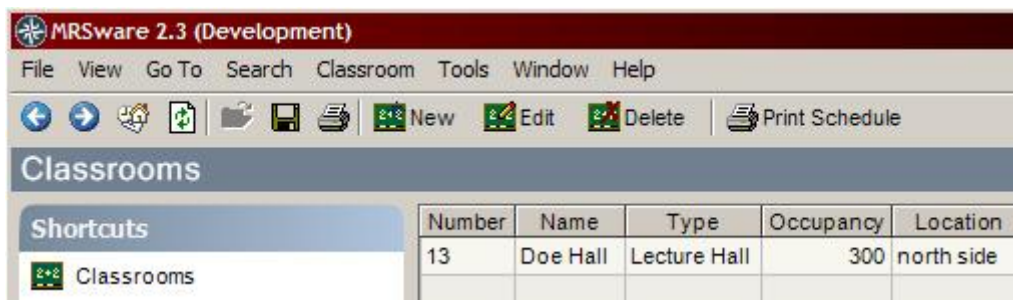
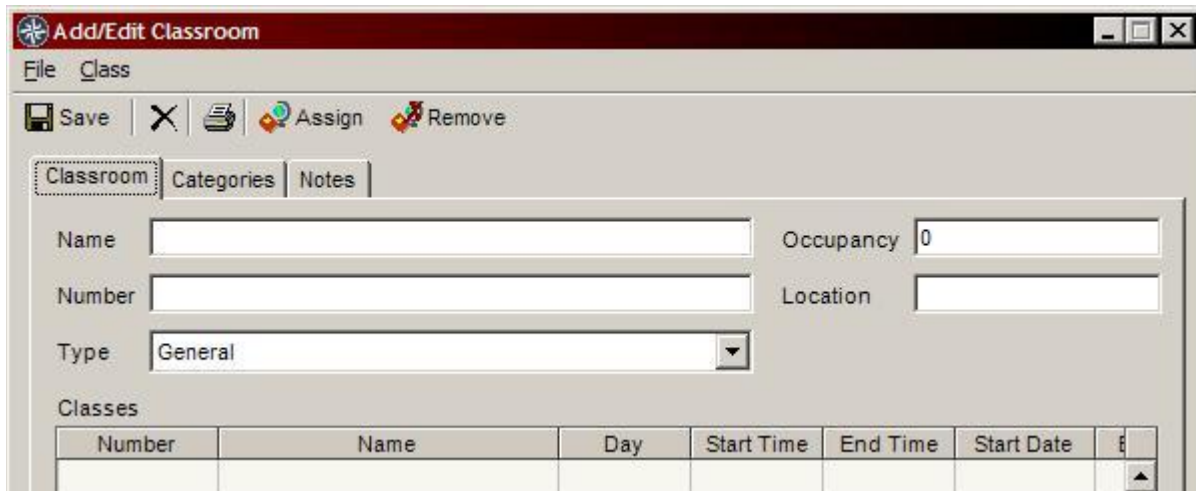


Figure 9 – classroom data table

Field Name	Description
New	Loads a blank Add/Edit Classroom dialog
Edit	Loads the selected classroom in the Add/Edit Classroom dialog
Delete	Removes the selected classroom(s) from the system
Print Schedule	Runs the <i>Classroom Schedule</i> report for the selected classroom (more info)

Table 8 – classroom data table options

The Add/Edit Classroom dialog (Figure 10) is the primary way classrooms are added to the system. This dialog allows you to modify all the fields described in Table 7. Along with the options outlined in Table 8, this screen also allows you to add or remove class assignments to this classroom. To assign this classroom to a class, click the *Assign* button or right click on the *Classes* table and choose *Assign Existing*. This will load Class Chooser dialog shown in Figure 17. See the [Class Assignment](#) section below for more information about this dialog. To remove the classroom from classes, simply highlight the classes desired and click the *Remove* button or right-click on the table and choose *Remove*.

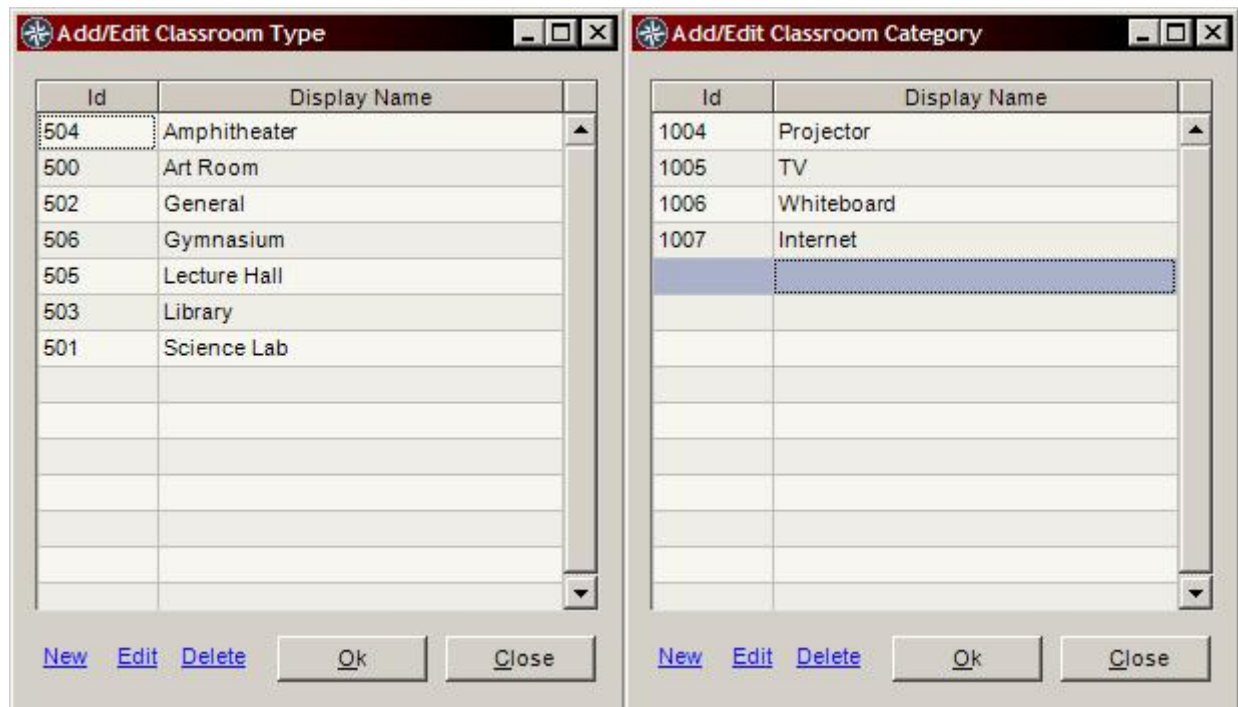


The 'Add/Edit Classroom' dialog box features a menu bar with 'File' and 'Class'. Below it is a toolbar with icons for 'Save', 'Cancel', 'Print', 'Assign', and 'Remove'. Three tabs are visible: 'Classroom' (selected), 'Categories', and 'Notes'. The 'Classroom' tab contains input fields for 'Name', 'Number', 'Type' (a dropdown menu currently showing 'General'), 'Occupancy' (a numeric field with '0'), and 'Location'. At the bottom, there is a table titled 'Classes' with columns: 'Number', 'Name', 'Day', 'Start Time', 'End Time', 'Start Date', and 'End Date'.

Figure 10 – the Add/Edit Classroom dialog

Types and Categories

The classroom types and categories described in Table 7 are user-defined fields that help describe and label the classrooms in the system. To modify these fields, navigate to *Go To → Education → Manage → Classroom Types/Classroom Categories*. The corresponding Add/Edit dialog shown in Figure 11 will display; these are standard dialogs that allow you to Add, Edit or Delete items by using the links in the bottom left of the screen.



Two side-by-side dialog boxes are shown. The left dialog, 'Add/Edit Classroom Type', has a table with columns 'Id' and 'Display Name'. It lists several types: 504 Amphitheater, 500 Art Room, 502 General, 506 Gymnasium, 505 Lecture Hall, 503 Library, and 501 Science Lab. The right dialog, 'Add/Edit Classroom Category', has a similar table with columns 'Id' and 'Display Name', listing categories: 1004 Projector, 1005 TV, 1006 Whiteboard, and 1007 Internet. Both dialogs have 'New', 'Edit', and 'Delete' links in the bottom left, and 'Ok' and 'Close' buttons in the bottom right.

Figure 11 – the Add/Edit Classroom Type and Category dialogs

Searching

An advanced searching mechanism is provided to locate classrooms by common criteria that they share. To open the Advanced Classroom Search dialog (Figure 12), navigate to *Search → Classrooms*. To use this screen, simply enter the data into the fields you wish to search on and click the Ok button. Multiple fields are brought together using "AND" logic meaning that if two or more search values are entered,

matching classrooms must match all values. The matching classrooms, if any, will display in the main Classroom table (Figure 9). The available search fields are described below in Table 9.

Figure 12 – the Advanced Classroom Search dialog

Field Name	Description
Name	Searches the name field on the classroom, wild cards are permitted
Number	Searches the number field on the classroom, wild cards are permitted
Location	Searches the location field on the classroom, wild cards are permitted
Type	Searches the type field on the classrooms in an "OR" fashion; any classrooms of the checked Types are returned
Occupancy	Returns classrooms whose occupancy is between the two values
Categories	Searches classrooms' assigned categories in an "OR" fashion; any classroom assigned any one of the checked categories is returned

Table 9 – searchable classroom fields

Reports

One Classroom-related report is available for viewing and printing. *Classroom Schedule* is accessible from the main Classroom table (Figure 9), the Add/Edit Classroom dialog (Figure 10) and the *Report Explorer* located in the *Shortcuts* panel. When run from the classroom table or dialog, the report automatically is set to the selected classroom. When run from the Report Explorer, however, the desired classroom must be selected from a list. Once a classroom is selected, the report will display the classroom's data and the classes assigned to it.

Classes

Overview

In MRSware, the Class data item is used to represent a set of times that a subject will be taught or an event will occur. A class is used to bring together the three previously described data items: teacher, student and class. The times in which a class is being held dictates an item's schedule and determines which items are "assigned" to one another. The data fields that comprise a class are described below in Table 10.

Field Name	Description
Name	The main description of the class
Type	A user defined field that describes the class' subject (more info)
Number	A free form number or code used to represent the class
Dates	The start and end of the class
Registration	The registration start and end dates of the class
Class Times	The days and times the class will be held
Categories	A user defined list that can be used to label each class (more info)
Notes	A free form text field
Teachers	The teachers assigned to this class (more info)
Students	The students assigned to this class (more info)
Classrooms	The classrooms assigned to this class (more info)

Table 10 – class data fields

Managing

The main class table (Figure 13) can be accessed from the *Classes* icon in the *Shortcuts* panel or from the main menu by navigating to *Go To → Education → Classes*. This is a standard MRSware data table whose options are available under the *Class* menu, in the main button bar directly below the main menu and by right clicking on the table. The options available are described below in Table 11.

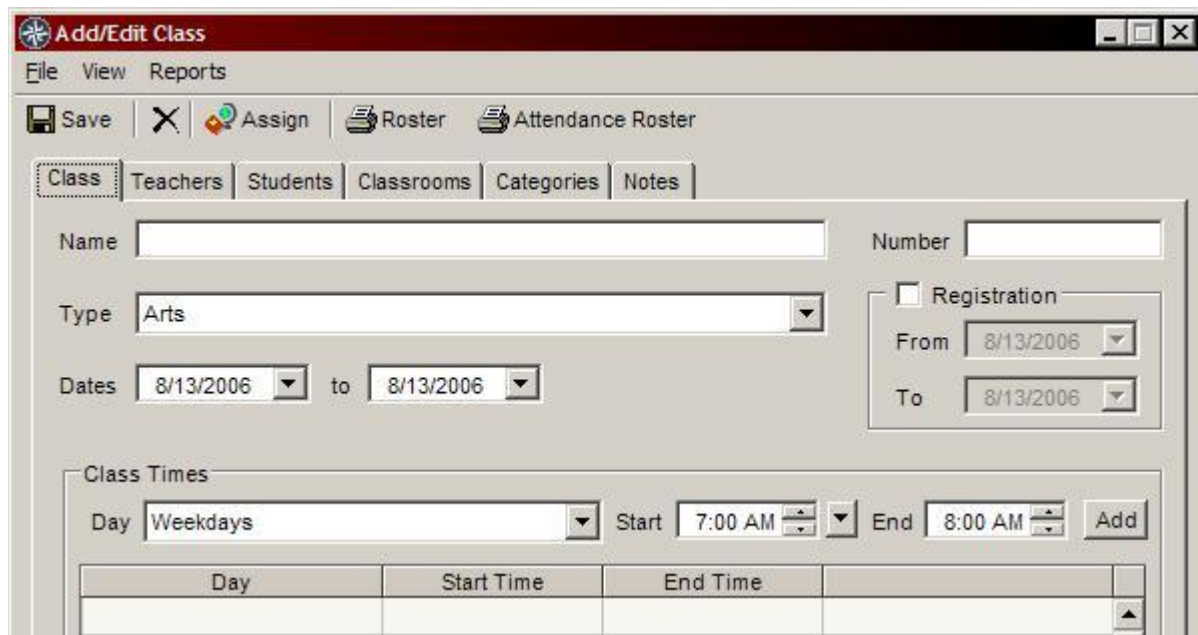
Number	Name	Type	Start Date	End Date	Registration Start Date	Registration End Date
101	Spanish	Foreign Language	08/01/2006	12/31/2006	07/01/2006	07/31/2006

Figure 13 – class data table

Field Name	Description
New	Loads a blank Add/Edit Class dialog
Edit	Loads the selected class in the Add/Edit Class dialog
Delete	Removes the selected class(s) from the system
Assign	Runs the Class Assignment Wizard for the selected class (more info)
Roster	Runs the Class Roster report for the selected class (more info)
Attendance Roster	Runs the Attendance Roster report for the selected class (more info)

Table 11 – class data table options

The Add/Edit Class dialog (Figure 14) is the primary way classes are added to the system. This dialog allows you to modify all the fields described in Table 10 and perform the actions in Table 11.



The **Add/Edit Class** dialog box features a menu bar with **File**, **View**, and **Reports**. Below the menu bar are icons for **Save**, **Assign**, **Roster**, and **Attendance Roster**. The **Class** tab is selected, with other tabs including **Teachers**, **Students**, **Classrooms**, **Categories**, and **Notes**.

Fields include:

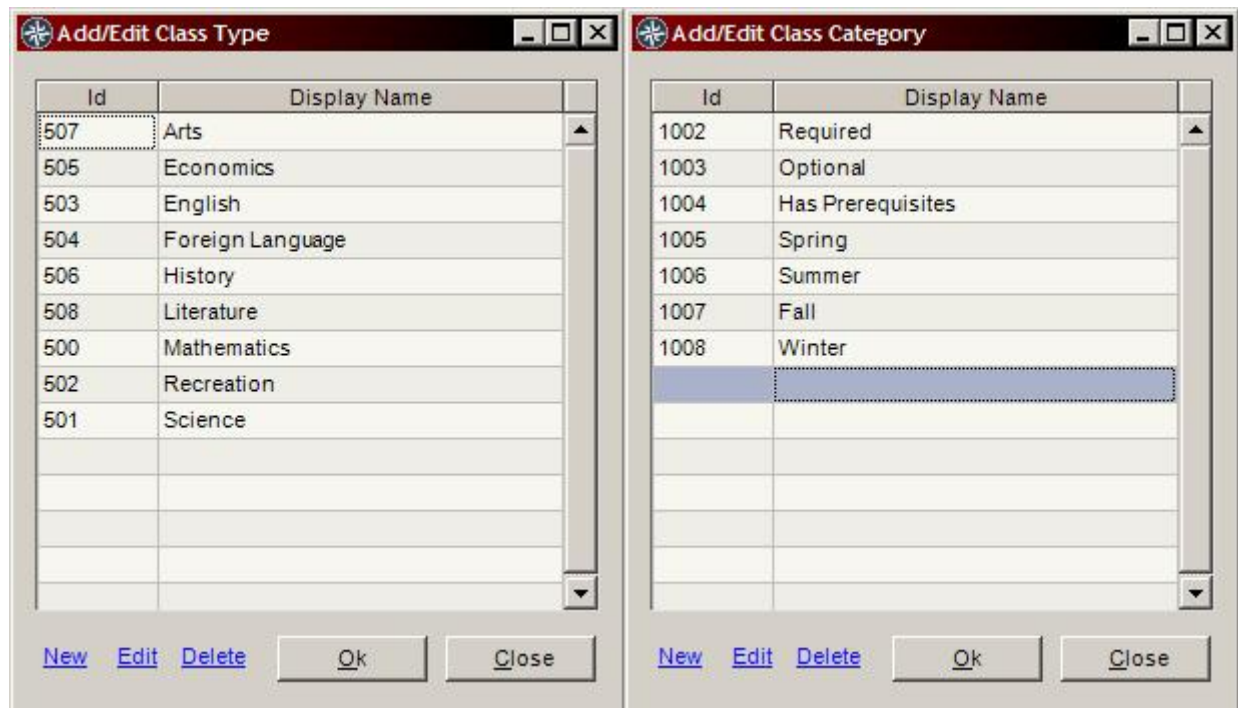
- Name**: Text input field.
- Number**: Text input field.
- Type**: Dropdown menu set to **Arts**.
- Dates**: Two date pickers set to **8/13/2006**.
- Registration**: A checkbox and a date range (From **8/13/2006** to **8/13/2006**).
- Class Times**: A section with a **Day** dropdown set to **Weekdays**, **Start** time set to **7:00 AM**, **End** time set to **8:00 AM**, and an **Add** button.

A table at the bottom displays class times with columns **Day**, **Start Time**, and **End Time**.

Figure 14 – the Add/Edit Class dialog

Types and Categories

The class types and categories described in Table 10 are user-defined fields that help describe and label the classes in the system. To modify these fields, navigate to *Go To → Education → Manage → Class Types/Class Categories*. The corresponding Add/Edit dialog shown in Figure 15 will display; these are standard type editing dialogs that allow you to Add, Edit or Delete items by using the links in the bottom left of the screen.



Two side-by-side dialog boxes are shown: **Add/Edit Class Type** and **Add/Edit Class Category**.

Add/Edit Class Type displays a table with the following data:

Id	Display Name
507	Arts
505	Economics
503	English
504	Foreign Language
506	History
508	Literature
500	Mathematics
502	Recreation
501	Science

Add/Edit Class Category displays a table with the following data:

Id	Display Name
1002	Required
1003	Optional
1004	Has Prerequisites
1005	Spring
1006	Summer
1007	Fall
1008	Winter

Both dialogs have buttons for **New**, **Edit**, **Delete**, **Ok**, and **Close** at the bottom.

Figure 15 – the Add/Edit Class Type and Category dialogs

Searching

An advanced searching mechanism is provided to locate classes by common criteria that they share. To open the Advanced Class Search dialog (Figure 16), navigate to *Search* → *Classes*. To use this screen, simply enter the data into the fields you wish to search on and click the *OK* button. Multiple fields are brought together using “AND” logic meaning that if two or more search values are entered, matching classes must match all values. The matching classes, if any, will display in the main Class table (Figure 13). The available search fields are described below in Table 12.

Figure 16 – the Advanced Class Search dialog

Field Name	Description
Name	Searches the name field on the class, wild cards are permitted
Number	Searches the number field on the class, wild cards are permitted
Teacher	Allows you to select classes which have the given teacher(s) assigned
Student	Allows you to select classes which have the given student(s) assigned
Classroom	Allows you to select classes which have the given classroom(s) assigned
Type	Searches the type field on the classes in an “OR” fashion; any classes of any of the checked Types are returned
Start Date	Returns classes whose start date is between the two values
End Date	Returns classes whose end date is between the two values

Categories	Searches classes' assigned categories in an "OR" fashion; any class assigned any one of the checked categories is returned
------------	--

Table 12 – searchable class fields

Reports

Two Class-related reports are available for viewing and printing. They are both accessible from the main Class table (Figure 13), the Add/Edit Class dialog (Figure 14) and the *Report Explorer* located in the *Shortcuts* panel. When run from the class table or dialog, the reports are automatically set to the selected class. When run from the Report Explorer, however, the desired class must be selected from a list. The first report, *Class Roster*, displays the class' data fields, the teacher assigned, the days and times it is held and the students who are assigned. It will also print the names of the students' parents if the *Parent/Child* relationship is set up between the student's system contact and the parent's system contact. The second report, *Attendance Roster*, displays the same information as *Class Roster* (excluding parent data), except it is done in a form that allows each student's attendance to be checked off in a grid form.

Class Assignments

There are two different methods to assign Teachers, Students and Classrooms to classes using the data item screens shown in the previous sections. The first is used by the Teacher, Student and Classroom tables and add/edit screens. Each screen allows you to access an *assign* feature that will load a common screen (Figure 17). To use this screen, simply highlight the class to assign on the left, choose the times you would like on the right and click the *OK* button. Doing this will assign the selected class times to the data item that was selected at the time the *Assign* option was used.

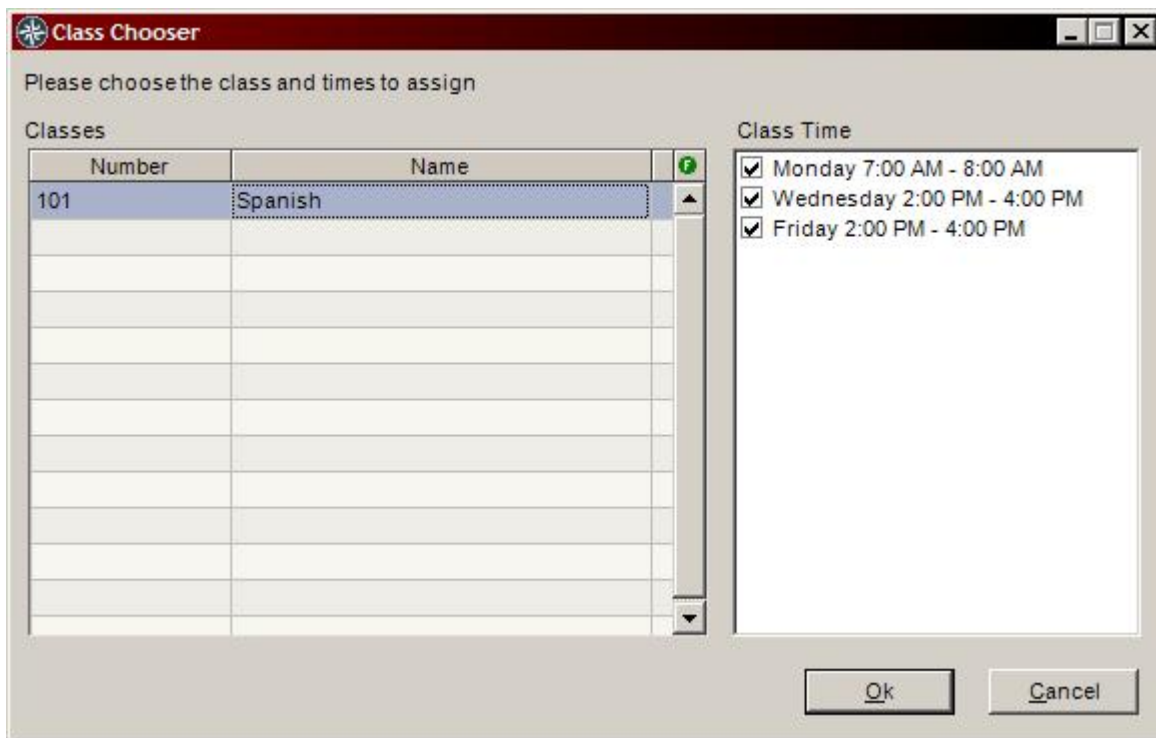


Figure 17 – the Class Assignment screen

The second method is used by the Add/Edit Class dialog and works in the opposite manner as the Class Assignment screen. Instead of choosing a class to assign, you use the corresponding tab on the Add/Edit Class screen to assign Teachers, Students, and/or Classrooms to the class you are viewing. Teachers and Students are selected via their system Contact* and Classrooms are chosen from a list. Simply locate the

proper item to assign and click the *Add* button. If a scheduling conflict occurs, you will be notified and the assignment will not take place.

* - The contact selector on the Teacher tab will only search Contacts whose type is *Teacher*; the same is true for Students

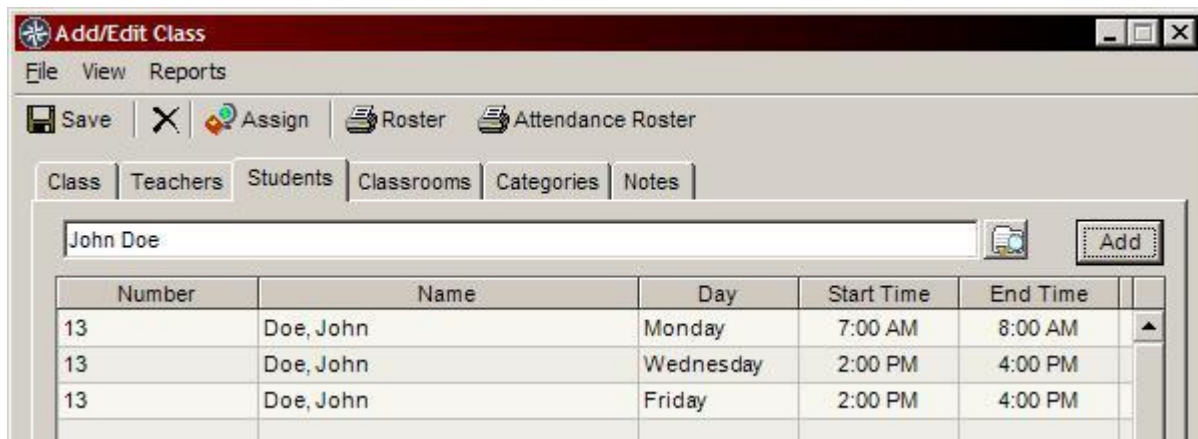


Figure 18 – the Add/Edit Class dialog, Students tab

Class Assignment Wizard

The *Class Assignment Wizard* represents a third method that can be used to assign items to a class. To access the wizard, navigate to *Go To → Education → Class Assignment Wizard*.

The first page of the wizard simply displays a welcome screen that explains what the wizard will do; click *Next* to proceed. The next page asks you to choose the class you would like to assign items to. Highlight the class you would like and click *Next*. The third page asks you which items you would like to assign: Teachers, Students or Classrooms. For each item you check, a page like the one in Figure 19 will display as you click *Next*. This page allows you to make multiple assignments of the corresponding data item to the class you chose. To make the assignments, check off the data items to assign on the left, choose the class times on the right and click the *Assign* button. This will load your choices into the *Assignments* table allowing you to make additional choices.

When you have made all your assignments, click *Next*. If there are more data item types to assign, another screen like Figure 19 will display, otherwise a confirmation page will load. The confirmation page displays the number of assignments you have made and asks you to confirm that you want them to be made. If you want to complete your changes, click *Finish* otherwise click *Cancel* to close the wizard or *Back* to make changes.

Class Assignment Wizard

Teacher Assignment
Please select a teacher and class time combination and click the Assign button. The entries in the Assignments table will be added to the system.

Chosen Class: 101 - Spanish

Teachers

	Number	Name	Type	
<input checked="" type="checkbox"/>	13	Doe, John	Professor	▲
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Class Time

☒ Monday 7:00 AM - 8:00 AM
☐ Wednesday 2:00 PM - 4:00 PM
☒ Friday 2:00 PM - 4:00 PM

Assignments

Number	Name	Day	Start Time	End Time	
13	Doe, John	Monday	7:00 AM	8:00 AM	▲
13	Doe, John	Friday	2:00 PM	4:00 PM	

Assign

< Back

Next >

Cancel

Figure 19 – the Class Assignment Wizard

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