

ClassFlow Administrator User Guide

ClassFlow User Engagement Team

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Overview

Several features available within ClassFlow are customizable based on the specific needs of a particular school. Therefore, when looking at a specific site for the first time, it is important to verify that the functionality matches what was originally requested by the school.

Administrators have access to additional functionality in ClassFlow that teachers and students do not. This functionality usually impacts users on a large scale and therefore access is restricted to Administrators only. Most of these features can be found under the *More -> Setup* option from the top-level navigation.

The information in this document outlines each option in the *Setup* section of the site, including:

1. User Management
2. Performance Bands
3. Rosters
4. Job Results
5. Authentication
6. Standards
7. Teacher Spaces

User Management

The processes outlined in this document are **intended for ClassFlow sites that are NOT integrated with a Student Information System** or other school data system. However, for SIS integrated sites, these instructions show how to add Administrative users that may not be included in the SIS, but for which a ClassFlow login is still desired.

If the client, or Partner, chooses to avoid integrating ClassFlow with a data system, then user data and class rosters can be manually entered into ClassFlow via the user interface. There are two ways to create user accounts: via the User Management page; or through the Self-Registration feature.

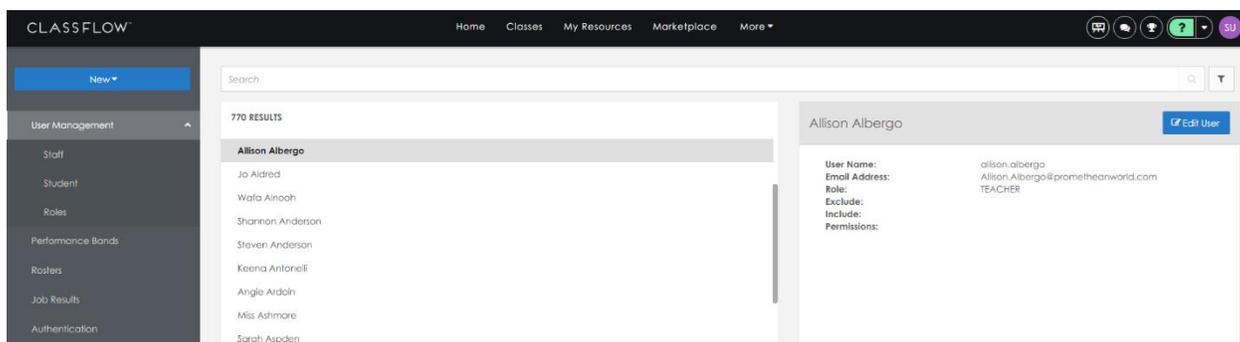
This section provides step-by-step instructions for performing both methods of manual data entry.

The only technical skills required to perform this data entry is a working knowledge of the relevant sections of the ClassFlow application. For bulk imports of users, a working knowledge of a data spreadsheet program (i.e. Microsoft Excel) is also required.

Manual Entry via the User Management Page

Only users with the *ADMIN* (Administrator) role, or those with the *Manage Users* permission will have access to the User Management page, and can follow these steps to add users:

- From the top-level navigation, click *More* -> *Setup*
- The User Management page is split into three main sections (see image below):
 - Left Column: Options to View/Edit Staff, Student and Roles. Each selection determines the list of users being displayed in the middle column.
 - Middle Column: There is a search bar at the top and the search results are displayed below. The role type of users being displayed is determined by the selections on the left-hand column.
 - Right Column: Displays the Details for the user or role being selected from the middle column.



Creating Individual Users

- **To create a new user**, select *Staff* or *Student* from the left-hand column, click the *New* button above and select *New Staff* from the dropdown menu to create a Teacher or Admin user. (Likewise, click *Student* to create a Student user.)
- Enter the User Details in the right column for the new user being created. There are several fields to be populated and each are described below.
 - **Active User** (checkbox) - This needs to be checked for the user to be active. It is checked by default. If in the future, the user account is no longer needed, it can be deactivated by unchecking this box.
 - **Externally Authorized** (checkbox) - This box will be checked ONLY if there is a 3rd party authentication system being used (i.e. Google, Office365, SAML, etc.) In that case, we suggest adding the users via a .csv import

and the checkbox will become checked based on that data file. (See the User Import section below). For manual entry, this box should remain UNCHECKED. It is unchecked by default.

- **First Name**- Enter the First Name of the User here.
- **Last Name**- Enter the Last Name of the User here.
- **User Name**- Enter the desired User Name for the User here. There is a 50-character limit on the User Name. It is not case sensitive. If the User Name already exists in the system, it cannot be added again.
- **Email Address**- Enter the Email Address for the User here. This is REQUIRED for Staff users, but not for Students. If the Email Address already exists in the system, it cannot be added again.
- **Password / Confirm Password**- Enter the desired Password for the User here. This is CASE SENSITIVE. ClassFlow requires that the password must be at least 8 characters and have at least 1 number contained in it.
 - Note- For existing users, this field will display as: *Password Reset / Reset Password*
- **Role**- Click in the field and select the desired Role from the dropdown menu. The options include: Admin; Teacher; Student.
- **Role Permissions**- These will auto-populate depending on the role that is selected. The permissions in this field cannot be edited.
- **Exclude**- Selected permissions can be excluded from a given user if entered in this field. Do not enter permissions in this field unless the impact of that exclusion is known.
- **Include**- Selected permissions can be included for a given user if entered in this field. Do not enter permissions in this field unless the impact of that exclusion is known.

Creating Users via .CSV Bulk Import

- ClassFlow also provides schools with the ability to import a list of users via a .csv file. To do so from the User Management page, simply select Staff or Student from the left-hand column, click the *New* button above and select *Import Staff* from the dropdown menu. Likewise, click *Import Student* to create Student users and follow the same process.
- The import instructions will appear on the right side of the page.

- An **outline of the file format** is listed as well as an option to **Download Sample File**, which provides a template that is already formatted correctly. The bolded items on the left are the file column headers (which are case sensitive) and the items to the right are examples of the data that would be populated under each column header. Note: for *Active* and *External Authentication*, use either Y or N.
- Once the data has been populated to the Sample File and saved to your computer, click *Upload* to browse to the user file, click *Open* and the file will immediately begin uploading users into ClassFlow. An upload indicator will appear in the bottom right corner of the screen to alert the user when the file has uploaded.
- At that point, the users are entered in the system they can login and can use all the ClassFlow functionality that their role allows.
- Results of the user file upload can be viewed on the Job Results page. This is helpful when determining how many users were added to the site.
- From here, Teachers can manually create their classes, and Students can join those classes once they are given a class code.

Manual Entry via the Self-Registration Method

In this method, the creation of users and class rosters is done by the users themselves via the Self-Registration tool. This is a great way to crowd source the data entry which saves the Administration team the time of manually creating users. This feature will need to be enabled by Promethean at the time the site is created. Administrators can instruct their staff and students to follow these steps to create their own accounts:

- Click *Login* in the top right corner of the landing page.
- On the Login Page of the site, Users can click the *Sign up now!* link at the bottom of the Login box. If that link is not available, then Self-Registration has not been enabled for that site. Since this feature is enabled at the time the site is created, only Promethean can turn this feature on.
 - Note: The Login page will look slightly different if the site is integrated with a 3rd party authentication system, such as Office 365.
- There are separate Registration pages for Teacher and Student Users, so make sure the user is creating the correct account type at the time of registration. Details on the necessary information for both Student and Teacher registration is below.

Student Registration

- **Class Code**- This is the unique 5-digit code for the class to which the student will join. Only one class code can be entered on this page. Once the student user is created, additional class codes can be entered on that student's Classes homepage.
- **Create User Name**- Enter the desired User Name for the User here. There is a 50-character limit on the User Name. It is not case sensitive. If the User Name already exists in the system, it cannot be added again.
- **First Name**- Enter the First Name of the User here.
- **Last Name**- Enter the Last Name of the User here.
- **Email Address**- Enter the Email Address for the User here. This is OPTIONAL for Students. If the Email Address already exists in the system, it cannot be added again.
- **Password**- Enter the desired password for the User here. ClassFlow requires that passwords must be at least 8 characters and include at least 1 number. Passwords are case sensitive.
- **Confirm Password**- Retype the desired password. It must exactly match the password entered above.
- **To finish**, click *Sign Up as Student*.

Teacher Registration

- **Create User Name**- Enter the desired User Name for the User here. There is a 50-character limit on the User Name. It is not case sensitive. If the User Name already exists in the system, it cannot be added again.
- **First Name**- Enter the First Name of the User here.
- **Last Name**- Enter the Last Name of the User here.
- **Email Address**- Enter the Email Address for the User here. This is REQUIRED for Staff users. If the Email Address already exists in the system, it cannot be added again.
- **Password**- ClassFlow requires that passwords must be at least 8 characters and include at least 1 number. Passwords are case sensitive.
- **Confirm Password**- Retype the desired password. It must exactly match the password entered above.
- **To finish**, click *Sign Up as Teacher*.

Creating Class Rosters

- Student Users will need to be added to a class Roster in order to access content for that given class. This can only be done by logging in as that Student adding the class code in the box at the top left corner of the student's Classes Page. Enter the 5-digit alphanumeric code and click *Enroll*.
 - Note- **Class Codes** are provided by the Teacher, and can be found on the top right corner of Teacher's homepage for that class. Each Class Code is unique to that class and remains unchanged for as long as the class exists.

Tips on Simplifying the Process

The teacher may wish to create the Student user accounts for her students to avoid having to walk them through the process. This is particularly useful for classes with younger students. In order to do this, the teacher simply needs to follow the steps in the *Student Registration* section of this document to create a unique account for each student. Be sure to record the usernames and passwords for each account as they are created in order to eventually distribute to the students.

Again, one Class Code can be entered during registration, so if the teacher wishes to add a student to more than one class, she will need to login to that newly created student account and add additional Class Codes to the student account. Instructions for this are found in the *Creating Class Rosters* section of this document.

Teachers also have the ability to edit Student Account Details and Passwords at anytime. To do this, the teacher can simply click on her *Class -> Roster-> Select a student from the list->* and click either the *Change Password* or *Edit Student Details* buttons on the right side. The teacher can also remove a student from her class by clicking the trash can icon to the left of the *Change Password* button.

Performance Bands

Admins can create a performance band that teachers can apply to their assessments and group students into performance based cohorts. The performance reports show student performance based on the performance band that is applied.

- This page is split into three sections. Clicking the *Performance Bands* option from the left side will display the list of existing performance bands in the middle of the page. Selecting a performance band from the middle will display the details on the right side of the page.

Creating Performance Bands

- To create a new Performance Band, Click the *Performance Bands* option from the left side and click *New* and then *New Performance Band* from the dropdown menu.
- Name the performance bands and enter the descriptions for each band along with the *Percentage Range*. Add a band by clicking the *+Add Band* option at the bottom, and delete a band by clicking the trash can to the right.
 - Note- Ensure that the Percentage Ranges do not overlap. For example, Band A could have a Percentage range from 90-100, then Band B would have a Range from 80-89, and Band C would be from 70-79, etc.
- Options to delete, copy and Edit Performance Band can be found in the top right corner.
- When creating an assessment, Teachers can assign a performance band to that assessment and then view student performance by clicking on *More -> Reports -> Performance Report*.

Rosters

On this page, Admins can view all the rosters that exist on the site. This is particularly useful when validating an integration with a school data system. The page is split into three sections. Selecting Rosters on the left side will populate the middle with all class rosters on the site. This includes all rosters, whether they are imported from a SIS or created manually.

The search box at the top can be used to filter the list of class rosters by teacher, student or class name.

The following information is displayed for each class roster:

- Class Name
- Class Code
- Roster Type
- Subject
- Grade
- Duration (start and end date)
- Teacher
- Student Roster (list of all students in the class)

Note: This page is for information only, and class rosters cannot be edited by an Admin here.

Job Results

This page shows the results from a data load and allows an Admin to view the summary of that data import. This includes results from both an import from a SIS, as well as a bulk import of users from the user management page.

- The page is split into three sections. Select *Job Results* from the left side of the page and the middle column will display a list of past data file imports. There is a search box to help narrow your results.
- There is also a filter below the main search box which filters results by All, Completed, Completed with Errors, Failed and Started.
- The filter icon to the right of the search box provides an *Advanced Search*. *Advanced Search* allows the list to be filtered by Job Type, Date Range and Staff.
- Select the desired job from the middle column and the results will display on the right side. Users can view the following information:
 - *Job Summary*- includes the # of Successfully Loaded rows and # of Error Rows.
 - *Errors*- includes the number of Error Rows and if there are Errors in the (Column) Header Row.
 - A table will display the Error rows including the Row #, Error Reason, and Error Record.
 - *Download error file*- click this button to download a full list of errors

Authentication

On this page, Admins can configure open authentication connections for the site. This may include the Cloud Storage sites (Dropbox, Google Drive or OneDrive) as well as open authentication Login options (like Google and Office365).

- The page is split into three columns. On the left side click *Authentication* and a list of existing Authentication Types for that site will display in the middle column. When one is selected, the details for that authentication type will display on the right side.
- At the top of the middle column, click the +Add Authentication Type button to create a new open authentication connection, and fill in the details on the right side.

Creating a new Authentication Type

When creating a new authentication type, you'll need to fill out the following information:

- **Provider Name**- Name the authentication connection being created. This name is not displayed anywhere on the site other than on the Authentication page list.
- **Authentication Provider**- Choose one of the following from the dropdown menu, as listed below.
 - Dropbox- Only for My Resources
 - Clever- Login only
 - Facebook- Login only
 - Google- both Google Drive and Google Login
 - LDAP- Login only
 - Office365- Login only
 - OneDrive- Only for My Resources
 - OneDrive for Business- Only for My Resources
- **Key Value**- This is provided by the authentication provider when the connection to ClassFlow is initially set up.
- **Secret**- This is provided by the authentication provider when the connection to ClassFlow is initially set up.
 - To obtain the Key Value (sometimes called the Client ID), and Secret, the Admin must first create an account and App on the site of the specific authentication provider. The process varies on each provider, but the only information needed is the ClassFlow site URL and a name choose for your App.
 - Here is a list of some of the sites where those authentication apps can be created:
 - Google- <https://console.developers.google.com/start>
 - Dropbox- <https://www.dropbox.com/developers>
 - OneDrive- <https://account.live.com/developers/applications>
 - Office365- <https://manage.windowsazure.com/>
 - Additional documentation will be provided by the authentication provider.
- Options
 - **Active**- Check this box to activate the authentication type. It must be checked for it to work.
 - **UI Login Enabled**- Check this box to enable the open authentication login option on the login page of the site. (Facebook, Google, LDAP, Office365 only).
 - **Available for My Resources**- Check this box to enable the cloud storage drive within My Resources. (Dropbox, OneDrive, OneDrive for Business,

- Google only).
- **Available for Classes**- This option is only available for Google Classroom. If Google Authentication is set up and this box is checked, users can import their Google Classroom rosters from the Classes page. This is only available for non-SIS integrated sites.
- **Sort Sequence**- Numeric values entered here will determine the order in which the drive options are displayed on the My Resources page. 0 will list the option at the top, followed by 1, 2, etc.

Standards

Administrators can enable the use of US State Standards on their site. The standard sets are provided from [Academic Benchmarks](#) and are displayed by State and/or subject in the middle column of the Standards page. When selected, a state's standards will display on the right-hand column. The Admin can check the individual sets of standards to be displayed, or click *Select All* to select all standards for that State or subject. Click *Save*, and those standards will be available for teachers to add to resources throughout ClassFlow.

Teacher Spaces

If available on your site, Teacher Spaces are located in *My Resources* and allow users to create communities dedicated to a specific subject, topic or theme. These communities allow users to create and share content easily with a group of selected educators.

Resources stored in a Teacher Space are available to all users that have been given access to the space. This means, that not only can users view the resources, they can also edit those resources, allowing for teachers to collaborate on the creation of content.

Creating a Teacher Space

Administrators are responsible for creating the Teacher Spaces and adding teachers to them. Follow these instructions to create a Teacher Space.

- Login as an Admin and click on *My Resources*. Select *Teacher Spaces* from the menu on the left, and at the top click the blue +New button and *Teacher Space* from the dropdown menu.
- Name the Teacher Space folder and press Enter.

- The Teacher space will then show up in the list in the middle column of the page, as well as below the Teacher Spaces option on the left side.
- Select the Teacher Space from that middle column, and the details will appear to the right. Click the *Edit Properties* on the top right corner to enter details about the Teacher Space including:
 - Title
 - Subject
 - Grade
 - Country
 - Language
 - Standard
 - Tags
 - Description
- Click the edit Icon to the left of the Edit Properties to *Edit Sharing*.
- From there, type in the *Select Users* box to add Teachers to the teacher space. Users will appear as you start to type in that box. Click Save when done.
- Once the Admin has selected users to join the Teacher Space, it will show up instantly for that Teacher under their own *My Resources -> Teacher Space* page.