

ProClass Instructions for Administrators

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1 Overview

ProClass is a class management and registration system. It has two portals: The Front End portal for students and the Back End portal for administrators. Individuals in the system are called contacts. Each contact is assigned to an account, usually with the same name, for financial purposes. Every individual has a contact #, an account # and if appropriate a member #. Individuals are categorized as students, teachers, Board Members, etc. Classes are organized by terms(semesters). Students can create their account, pay their membership fee and register (& cancel) for classes all online.

2 Administration Back End Portal Instructions

Administrator URL: <https://ars113.imperisoft.com/Login.aspx>

2.1 CLL Activities

2.1.1 Modify CLL Information on Welcome, Terms, etc

Top Menu: Administration

Manage Group: CLL Crossville, TN Unit

Black Menu: Make a selection.

This should display CLL information. Here you can allow duplicate email addresses. Allow students to cancel registrations. Etc.

Save Selection

2.1.2 Find a Contact

Top Menu: Home

In Lefthand Column of Dashboards

Select: Contacts

Type name in Search box (First, Last or Both)

Click: Search button.

Click: Edit icon *for more information about the contact.*

2.1.3 List all Active Contacts

Top Menu: Find

People Group: Contacts

Load Saved Search (Folder Icon) "6192 All Contacts"

This should list all active contacts.

2.1.4 Find an Account

(Revised 3/24/20)

Top Menu: Home

In Lefthand Column of Dashboards

Select: Accounts & Billing

Type name in Search box (First, Last or Both)

Click: Search button.

Click: Edit icon *for more information about the account*

2.1.5 List all Active Accounts

(Revised 3/24/20)

Top Menu: Find

People Group: Accounts

Load Saved Search (Folder Icon) "6247 All Active Accounts"

This should list all active accounts.

2.1.6 List All Users (Administrators)

Top Menu: Administration

Manage Group: CLL Crossville, TN Unit

Black Menu: Users

Blue Box: Manage Users

This displays a list of all Users.

2.1.7 Assign a Category to an Individual Contact

This example uses a individual called James Bond

Top Menu: Find

People Group: Contacts

Load Saved Search (Folder Icon) "6192 All Contacts"

This should list all active contacts.

Select Edit Icon at right of page of James Bond.

Black Menu: Categories

Blue Box: Select Manage contact categories

Check appropriate: Available Categories

Categories are:

Save Selection

2.1.8 Add a Back-end User

(Revised 3/21/20)

Top Menu: Administration

Manage Group: CLL Crossville, TN Unit

Black Menu: Users

Blue Box: Add New User....

Enter name, phone, email. Create a username and password.

Save

Assign role: Administrator/Registration Manager/Read-only

Save Selection

The new user is now active and can log-in.

2.1.9 Change Role of a Back-end User

(Revised 3/21/20)

Top Menu: Administration

Manage Group: CLL Crossville, TN Unit

Black Menu: Users

Select edit icon for user of interest.

Change user role

Save Selection

2.1.10 Change Logo

(Revised 4/21/20)

Top Menu: Administration

Manage Group: Center for Lifelong Learning Organization

Black Menu: Report Image

Upload a replacement image of the logo.

2.1.11 Change Automatic Emails

(Revised 4/21/20)

Top Menu: Administration

Manage Group: CLL Crossville, TN Unit

Black Menu: Online Registration Settings

Scroll down.

Three emails can be entered here:

1) Send Payment Emails to: *(Currently blank)*

2) Send New Account Notification Details to: *(Currently Shari Hahn's email)*

3) Customer Service Email Address: *(Currently CLL gmail)*

I do not know what triggers ProClass to send emails to each of these addresses.

2.2 Membership Activities

2.2.1 Assign Membership to a student

(Revised 4/21/20)

This example uses a student called James Bond.

This is a two-step process. 1)An account purchases a membership. 2) The membership is assigned to a contact in that account. (Even if we only have one contact on account it still has to be done.)

Dashboard Page: Accounts and Billing

Search : James Bond

Select Edit icon

Black Band: Select Memberships

Select: Purchase Membership

Select: 2020 Annual Membership

Click on save icon

Are you sure: OK

On the Edit Membership page that appears.:

Select: James Bond

Click on save icon to assign the membership to James Bond.

2.2.2 List all Members

Top Menu: Find

People Group: Members

Load Saved Search (Folder Icon) "6184 All Members"

This should list all members.

2.3 Semester Activities

2.3.1 Create a new Semester

(Revised 3/8/2020)

Top Menu: Find

Classes Group: Semesters

Load Saved Search (Folder Icon) "6189 All CLL Semesters"

If necessary, Select Search

All existing semesters are listed.

Sect Add New Semester at the bottom.

Enter the details: description, dates, etc.

Click on the Save Icon.

2.3.2 List All Classes in Spring Semester

Top Menu: Find

Classes Group: Classes

Load Saved Search(Folder Icon) "6174 Spring 2020 Classes"

This should list all classes.

2.3.3 Create a new Class

(Revised 3/8/2020)

Top Menu: Find

Classes Group: Semesters

Load Saved Search (Folder Icon) "6189 All CLL Semesters"

If necessary, Select Search

All existing semesters are listed.

Select the edit icon for the appropriate semester.

The semester has to be created before a class can be added.

Black Menu: Classes

The existing classes are listed.

Select Add New Class at the bottom of the list.

Enter the class details

Use the Black menu selections to add additional information as necessary.

2.4 Registration Activities

2.4.1 List all Registrations

Top Menu: Find

Classes Group: All Registrations

Load Saved Search(Folder Icon) "6168 All Registrations"

This should list all registrations.

2.4.2 List Registrations in a Class

Top Menu: Find

Classes Group: Classes

Load Saved Search(Folder Icon) "6174 Spring 2020 Classes"

Scroll right and click on the edit icon for the class of interest.

Black Menu: Registration

This should display all registrations for the selected class.

2.4.3 Close a Class Registration

(Revised 04/26/20)

Top Menu: Find

Classes Group: Classes

Load Saved Search(Folder Icon) "6174 Spring 2020 Classes"

Scroll right and click on the edit icon for the class of interest.

Black Menu: Online Registration

Change "Allow Registrations" to "Do Not Allow Registrations."

This should prevent students from registering or dropping this class.

3 Student Portal Instructions

3.1 Student Account Issues

3.1.1 Student Creating a New Account

(Revised 3/15/20)

1. Go to the new CLL website <https://roanestate.edu/CLL>
You will need to type it in the address bar of your browser, not in Google. This is a new website and Google has not discovered it yet so it will probably take you to wrong website. Look for Roane State at the top of the page and Center for Lifelong Learning(CLL) a little lower down to be sure you are on the right webpage.
2. Select "**Registration & Class Listing**"
3. At the top right of the page select "**New User? Start Here**"
4. Answer "**Individual**" to the first question "Type?"

5. Fill out personal details including Username and password (at least eight characters). (Make a note of these as CLL does not have access to this information.) Press **“Submit”**
6. After submitting the form you should get this message;

=====

Welcome!

Your new account has been successfully created and you have been automatically logged into the website.

You may add additional individuals to your account or click the continue to registration button.

Continue Registration

=====

7. When you have submitted the form an email will be automatically sent to the CLL Membership manager who will assign your pre-paid 2020 membership to your account.
8. *When you receive email notification that your membership is assigned to your account you will then be able to register for classes when registration for the Summer semester opens, which is currently planned for May 15, 2020.*

3.1.2 Student First Accessing their Account Created in the Back End

(Revised 3/15/20)

1. Go to the new CLL website **<https://roanestate.edu/CLL>**
 2. Select **“Registration & Class Listing”**
 3. At the top right of the page: Select Login
 4. Towards the bottom left of the page it should say” Forgot your password? Click Here to reset.”
 5. Select “Click Here”
 6. Submit your email address
 7. Receive an email and click on the link in the email.
-
8. You are taken to a page that displays your temporary username (Make a note of the username) and an opportunity to reset your password.
 9. Reset your Password (Make a note of your new password)
 10. Login in using the temporary username and new password
 11. At the top of Page: Select “Settings (Wheel) *Your Name*”
 12. Select the My Account button
 13. Change Username Field to something readable.
 14. Click Save button
- You need to make a note of your username and password as CLL does not have access to these.*

3.1.3 Student Forgotten Password or Username

1. Go to the new CLL website **roanestate.edu/CLL**
2. Select **“Registration & Class Listing”**
3. Top of Page: Select Forgot Password

4. Submit email address
5. Receive email with your username and an opportunity to reset password.
6. Note Username and new password.

3.1.4 Student Forgotten Password or Username when Sharing an Email Address

1. Go to the new CLL website roanestate.edu/CLL
2. Select "Registration & Class Listing"
3. Top of Page: Select Forgot Password
4. Submit email address
5. Receive email with Username and opportunity to reset password
6. If correct Username is received reset password if necessary
7. If incorrect username is received (husband's user name for example) then contact CLL and request that husband be temporarily made inactive.
8. Repeat reset password process.
9. If successful, contact CLL and make husband active again.

3.2 Normal Student Activities

3.2.1 Student Registering for a Class

(Revised 4/26/20)

(This can only be done when the student has been assigned a 2020 membership.)

1. Go to the new CLL website roanestate.edu/CLL
2. Select "**Registration & Class Listing**"
3. Log in
4. View Classes for: *Student Name*
5. Select Term: Spring 2020
6. Class Type: Any (You can select a type if you know it.)
7. Search
8. Scroll to the class of interest.
9. Select: Register
10. View Acknowledgement notice
11. Select: Continue or checkout
12. Continue if you want to register for another class.
13. You have 60 minutes to complete the checkout process.
14. Review Registrations
15. Review Terms and select "I have read....."
16. Select: Continue
17. "Click here for a printable page for your records."
18. You should receive an email confirming your registration(s).
You have completed the registration.

3.2.2 Student Dropping (Cancelling) a Class

1. Go to the new CLL website roanestate.edu/CLL
2. Select **“Registration & Class Listing”**
3. Log in
4. Top of Page: Select Settings (Wheel)
5. Three Buttons: Select My Account
6. Scroll to the bottom of the page
7. Select: My Registrations
8. Select: Drop for the class you wish to cancel

4 Glossary

1. Account

An account connects individuals with finances. The account name is the name of the primary individual. An account can be associated with multiple individuals. CLL allows multiple individuals (husband and wife?) to be on one account. The account contains current balance, payment history, etc. It also contains all class registration information.

2. User (Administrator)

Administrators can access the “Back End” of the system to make changes to students, classes, etc. Currently Michelle Bayless, Patty Meaney, Mike Durnwald, Shari Hahn and John Conrad are Full administrators. Sue Ginter, Judy Wade and Holly Hanson are “Read Only Access” administrators.

3. Class

A class is taught by a teacher and may consist of one or more sessions. It has a class “file” where the class description, date, time, teacher, etc. are kept.

4. Category

An individual can be assigned to multiple categories or roles: student, Instructor, donor, etc. The assigned categories are listed under the contact information for that individual.

5. Contact

Every individual has a contact “file” where address, phone, and other information is kept including memberships.

6. Individual

An individual is any person in ProClass. They may be an instructor, student, donor, etc.. They may be active or inactive. Every individual has a contact “file” and an account “file”.

7. Member

An individual who has purchased a membership.

8. Membership

Currently there is just one Membership: 2020 Annual Membership

9. Student

An individual who has been assigned to the Student Category. I think everyone who signs-up via the Front End Portal is automatically assigned as a Student.

10. Term

This is the same as semester.

Change History

3/8/20 2.3.1 Create New Semester, 2.3.3 Create a New Class

3/15/20 3.1.1 Student Creating a New Account, 3.1.2 Student First Accessing their Account
Created in the Back End

3/21/20 2.1.8 Add Back-end User, 2.1.9 Change Role of Back-end User

3/24/20 2.1.4 Find an Account, 2.1.5 List All Active Accounts,

4/21/20 Added 2.1.10 Change Logo, Added 2.1.11 Change Automatic Emails, Aded 2.2.1 Assign
Membership to a Student

4/26/20 Added 2.4.3 Close a Class Registration, revised 3.2.1 Student Registering for a Class