Easyclass documentation: Admin

1. **Introduction**
   * Brief overview of Easyclass.

Easyclass is a comprehensive web-based Student Information System (SIS) designed to streamline classroom management and enhance communication between teachers, students, and administrators.

With Easyclass, users can create and manage classes, distribute assignments, track students progress, and facilitate communication through a centralized platform.

The system offers a user-friendly interface, customizable features to suit the needs of different educational institutions, and robust reporting capabilities to track student performance and engagement.

Easyclass aims to simplify the administrative tasks associated with education, allowing educators to focus more on teaching and student development.

* + Purpose of the documentation.

The purpose of this documentation is to provide comprehensive guidance on using Easyclass web application. It aims to help users, including teachers, students, and administrators, understand the features and functionalities of Easyclass. This documentation serves as a reference for users at all levels, from beginners getting started with Easyclass to experienced users seeking to maximize the application's capabilities.

1. **Getting Started**
   * System requirements.

Before using Easyclass, ensure your system meets the following requirements: **Web Browser:** We recommend using the latest version of Google Chrome for the best experience. **Internet Connection:** A stable internet connection is required to access Easyclass. **Device:** Easyclass is compatible with desktops, laptops, tablets, and smartphones. We recommend however working on desktops for the best experience.

* Accessing Easyclass

To access Easyclass, follow these steps:

Your master admin from your organization will use your email and their master admin access to create an account for you.

Once your admin account is created, open your email inbox and check for an email from: GEERD ACCOUNTS. If you don't find it in your inbox, please check your spam or junk folder.

The email contains a temporary password and a link to sign up. Use the following steps to log in:

1. Click on the sign-up link in the email
2. Enter your email and the temporary password provided in the email
3. During the sign-up process, you will be prompted to change the temporary password to a new password of your choice.

Your new password has to follow these requirements :

1. 8 characters minimum length
2. Contains at least 1 uppercase letter
3. Contains at least 1 lowercase letter
4. After changing the password, you can log in to Easyclass. Use your email address and the new password then click "Sign in."
5. Upon successful login, you will be directed to the Easyclass dashboard.

If you have not received an email, or wish to gain access to Easyclass Admin, please contact your organization super admin. If you don't find it in your inbox, please check your spam or junk folder.

Additional Tips:

-Avoiding Extra Spaces: When copying the temporary password, ensure you don't include any extra spaces. These spaces may cause login issues.

-Troubleshooting: If you encounter any issues during the activation process, visit our Support Center for assistance.

-Forgotten Password: In case you forget your password in the future, use the "Forgot Password" option on the login page to reset it.

Now congratulations! You now have an admin account and are ready to start using Easyclass to enhance your teaching or learning experience.

1. **User Interface Overview**

Easyclass features a user-friendly interface designed to enhance usability and streamline classroom management. Here's an overview of the main interface elements:

* + Dashboard:

The Easyclass dashboard provides a comprehensive overview of your account and key information at a glance. Here's what you can find on the dashboard:

**Summary of Classes and Students:** The dashboard displays a summary of the total number of classes and students in your account, giving you an overview of your educational setup.

**Financial Summary:** You can view a summary of your financials, including revenue, outstanding payments, and overdue payments, helping you keep track of your finances.

**Calendar:** The calendar on the dashboard allows you to view and manage your schedule. You can filter the calendar by class, making it easy to see upcoming events and lectures for each class.

**Key Performance Indicators (KPIs):** The dashboard includes KPIs such as the number of active users and attendance rates, providing valuable insights into the performance of your educational institution.

**Shortcuts:** Easyclass provides shortcuts to commonly used features, such as creating a new class, creating a new account, and viewing today's teaching staff, allowing you to quickly access these functions and displays.

The dashboard is designed to provide you with a comprehensive overview of your Easyclass account, helping you stay organized and informed about your classes, students, finances, and key performance metrics.

* + **Navigation bar:**

Located at the top of the screen, the navigation bar allows users to easily switch between different sections of Easyclass. Here's an overview of the sections you can access from the navigation bar:

**Studies:** In the studies section, you can manage classes, courses, and admissions. This section is where you can create new classes, add courses to your curriculum, and track admissions to your educational institution.

**People:** The people section allows you to manage accounts and track students, professors, and guardians. Here, you can create new accounts for students, professors, and guardians, and keep track of their information and activities.

**Fees and Invoices:** In the fees and invoices section, you can create fees and invoices for students. This section helps you manage the financial aspects of your educational institution by tracking payments and generating invoices.

**Tools:** The tools section provides access to a set of tools designed to enhance the learning experience. Here, you can access e-learning blocks, virtual meetings, tests, and administrative papers, allowing you to create engaging and interactive learning environments.

The navigation bar in Easyclass is designed to provide easy access to the key sections of the application, helping you manage your educational institution efficiently and effectively.

* + **Search bar**

The search bar lets you widely search for information in classes, courses, students and instructors.

* + **Notifications**

Easyclass notifies users of important events, such as new assignments, messages, and upcoming deadlines, to keep them informed and organized.

* + **User profile**

Users can access and update their user profile, including, profile picture, personal information, platform language, and password.

1. **Managing Classes**

Easyclass provides a straightforward process for managing classes, allowing you to create and organize your classes efficiently.

* + Accessing class management

Here's how you can manage classes in Easyclass. First, navigate to the **Studies** section in the navigation bar then click on **Classes**.

* + Creating a new class.

To create a new class, click on the button **Create New Class.**

Fill in the class name, academic period, start and end dates.

Optionally, you can add courses to the class or do it later.

* + Editing class information

To view or edit class information, choose the card of the corresponding class and click on it.

You can also search for a class by using one or a combination of these filters:

1. Academic period
2. Name search
3. Date range search

Upon selecting a class card, click on **Edit class details** to edit class details.

Clicking on a class card gives you direct access to the class calendar, the courses and the students.

* + Class calendar

The first thing displayed in the class page is the class calendar.

The class calendar is a dynamic calendar that displays the scheduled lectures for this particular class. You can click on any scheduled lecture to view it and manage it More details in: *(Managing classes>Manage courses> lectures)*.

You can also use the calendar to add new lectures to the class.

To do so, click on a time window on the calendar to create a new lecture for the class and fill in the following information:

1. Select a course for the lecture.
2. Type in the title or name of the lecture. A color code will be automatically assigned to the lecture and you can optionally choose another color code for the lecture.
3. The start date will be filled automatically as you have selected a time window, but you can choose to edit it.
4. Select the duration of the lecture.
5. The lecturers will be chosen automatically once you have selected a course, but you can edit them.
6. Choose the occurrence of the lecture (one-off, weekly, or bi-weekly).
7. Optionally, select a classroom for the class.

By default, the lecture is set as a face to face class, but you can also mark it as an online lecture.

In the case of choosing an online lecture, you will be given two options:

* Geerd conferencing: choose this option to create a virtual classroom by using GEERD conferencing software. More details in: *(link to tools>virtual meetings)*
* Custom conferencing software: choose this option if you want to host the online lecture in a third party software such as: Teams, Zoom or, Google Meet.

Click **Save** to create the new lecture or **cancel** to go back to the calendar view.

Once you have created your class calendar, you can filter your calendar by day, week, or month and can print it by clicking on the print button on the top right of the screen.

* + Class courses

The second thing displayed on the class page is the class courses.

To attach a new course to the class, click on the **+** button on the top right of the class course section then search for the course you would like to attach, select the course and click **Save.**

If you have not created the course yet, go to the navigation bar, select studies, then click on courses to create a new course.

More details in: *(link to studies>courses)*

Click on the three vertical dots if you want to select on of the following options:

1. Edit course: To manage the course content or the classes the course is attached to. More details in: *(link to studies>courses)*
2. Course version: To select another version of the course
3. Manage professors: To manage the professors of the course.
4. Manage students: To manage the students of the course
5. Remove course: To remove the course from the class.

You can also click on the course card to fully manage the course options and features within the selected class. More details in: *(link to Managing class courses)*

* + Class students

The third thing displayed on the class page is the class students.

You can view the names and number of students in the class. Click on any student's name to access their profile and view detailed information. More details in: *(link to people>students).*

You can click on the add student button on the top right of the students section to add more students to the class:

-To add existing students, choose the **Single Select** option then search and select the students you want to add from the list.

-To import new students in bulk to the class, choose **Bulk import** option then follow the instructions to import a list of new students.

More details in: *(link to people>accounts).*

You can also remove a student from a class by choosing the **Single Select** option above and unchecking the student from the list.

1. **Managing Class courses**

Managing a course in a class in Easyclass allows you to organize course materials, track student progress, and communicate effectively with your students, enhancing the overall learning experience.

* + Accessing Class course management

When you are working on a given class, click on a course card to access the course details and manage it within the class.

The course page includes several sections. Each section will be detailed down-below.

* + General section

In the general section you can navigate between the following tabs:

**Calendar:** to view and edit the course calendar, which includes lectures, exams, and other important dates.

**Analytics:** to access analytics data, such as daily student attendance and average time spent per day.

**Students:** to see students enrolled in the course or to add or delete students from the course. Click on a given student card to access their profile. More details in: *(link to people>students).*

**Instructors:** to view the instructors assigned to the course, or to add or delete instructors from the course. Click on a given instructor card to access their profile. More details in: *(link to people>professors).*

* + Lecture section

In the lecture section you can view all lectures from a given course in a given class, including their status. The status of a lecture is set by default to scheduled, you can change the status of a given lecture by clicking on the current status and changing it to complete, scheduled, or cancelled.

You can also use this page to create new lectures by clicking on the button **Create new lecture** fill in the following information:

1. Type in the title or name of the lecture. The title of the lecture is by default set to the name of the course. A color code will be automatically assigned to the lecture and you can optionally choose another color code for the lecture.
2. Select the start date of the lecture
3. Select the duration of the lecture.
4. Select the lecturers of the lecture. The lecturers will be chosen automatically if you have already set professors for the course, but you can also unselect them or type new ones in manually.
5. Choose the occurrence of the lecture (one-off, weekly, or bi-weekly).
6. Optionally, select a classroom for the class.

By default, the lecture is set as a face to face class, but you can also mark it as an online lecture.

In the case of choosing an online lecture, you will be given two options:

- Geerd conferencing: choose this option to create a virtual classroom by using GEERD conferencing software. More details in: (link to tools>virtual meetings)

- Custom conferencing software: choose this option if you want to host the online lecture in a third party software such as: Teams, Zoom or, Google Meet.

Click Save to create the new lecture or cancel to go back to the lecture view.

Clicking on a given lecture will let you manage attendance for that lecture, create an assignment related to the lecture, share resources on that lecture or add notes that are specific to the lecture:

Click on **attendance** to see a list of all students enrolled in that lecture.

You can choose one of the following attendance statuses to mark all students:

* Unspecified
* Present
* Late
* Excused absence
* Unexcused absence
* Expulsion

You can also select a student an change his attendance status and even add a comment on the status.

Click on **assignments** to add a specific assignment to the lecture. More details in: *(link to managing class courses >Assignment section).*

Click on **resources** then **New resource** to add files to the lecture. Add a title and description to the resource then click upload file and select the file you want to attach. Click **Save** to add the file.

Click on **Notes** then **New note** to add a note to the lecture. Add a title and the content of the note in the body section. The note will be private to you by default. If you wish to share the note publicly with your students, select the option: **Visible to students**. Click **Save** to add the note.

* + Exams section

In the Exam section you can create online and offline exams for a given course in a given class.

To add an offline exam, click on the button **New Exam** and fill the following informations:

1. Type in the title or name of the exam
2. Select the start date of the exam
3. Select the duration of the exam

Optionally, select a classroom for the exam.

Select the option **Online test** if you want to make your exam online.

You will have to create an online exam on easyclass by going to the tools section in the navigation bar and selecting tests. More details in: *(link to tools>tests).*

Type in the name of the exam you have created then attach your online test and select the security measures for your exam.

Optionaly, you can mix between our two proctoring features:

* **Screen Share**: Select this option if you want our software to take pictures of the students screen every few minutes.
* **Webcam**: Select this option if you want our software to take pictures of your students webcam every few minutes.

**Note:** If you choose one of these proctoring features. Every student will have to allow for Screen sharing and/or Webcam sharing before getting access to the exam.

Please make sure all your students are aware of this for them to have a hassle-free examination experience.

Grading an offline exam: To grade an offline exam click on the edit button of the exam you want to grade then fill in the grades for every student.

Grading an online exam: To grade an online exam click on the edit icon of the exam you want to grade then click **Grade**. Select the **Students** tab if you want to grade student by student. Select the **Questions** tabif you choose to grade question by question.

Click on the **settings** icon if you want to edit the exam information.

If your exam is online, Click on the **pencil** icon to edit the content of the exam.

After grading your exam you can import the grades in the gradebook. More details in: *(link to managing class course >gradebook section).*

* + Content section

In the content section you can add content to the course.

Easyclass content creator allows you to create content in anyway you want.

First click on **Edit.** You can organize your content by Modules, activities, and checkpoints.

* 1. Modules can have an overview and cab be locked until a certain date. Click on the **settings** of a module to access these options. To add more modules click on **Add module**
  2. Activities can be comprised of Quizzes, Rich text, documents, videos, Images, Audio. Select the type you want to add and create it or import an already existing one. More details in *(link to tools >E-learning blocks).*
  3. Checkpoints are comprised of section. Click on the **settings** of a checkpoint the click **New Section** to add a section.

To create a check point follow these steps:

1. Fill the instructions for the checkpoint
2. Add the number of attempts allowed for the student to take the checkpoint
3. Add the passing score for the checkpoint
4. Create the sections of the checkpoint. Fill in the sections with blocks in a similar way to creating an activity. More details in *(link to tools >E-learning blocks).*

404 class course doesn't have a course version, and there's no default course version for this course.need help here.

* + Notes section

In the notes section you can create and keep general notes about the course you are in.

Click on **New note** to add a note to the course. Add a title and the content of the note in the body section.

The note will be private to you by default.

If you wish to share the note publicly with your students, select the option: **Visible to students**.

Click **Save** to add the note.

* + Resources section

In the resources section you can add files and share general resources about the course you are in.

Add a title and description to the resource then click upload file and select the file you want to attach. Click **Save** to add the file.

* + Assignments section

In the Assignments section you can create assignments or review and grade your students submissions.

To create an assignment click on **New assignment.**

Fill in the title set a deadline for the assignment.

The assignment can be comprised of one or many sections.

To add a new section type in the name of the section then click on **add new section**.

Once you have created and named all your section click **Save.**

To add content to a section click on the **edit** icon and Fill in the section with blocks in a similar way to creating an activity. More details in *(link to tools >E-learning blocks).*

To publish your assignment and make it visible by students click on the **Publish** button then confirm your choice.

To change the deadline of your assignment click on **Change deadline.**

To delete the assignment click on **delete assignment.**

Once your assignment is published you can view your students submissions by clicking on **view submissions** or grade your students by clicking on **grade**.

Select the **Students** tab if you want to grade student by student. Select the **Questions**  tab if you choose to grade question by question.

* + Gradebook section

In the gradebook section you can track students progress and manage your course grades and share them with your students or export them in a CSV file.

To get started, click on the button **Create new gradebook.** A list of your class students enrolled in the course will be created automatically.

Click **on import existing grade** to import grades from:

- an online or offline exam that you have already created in the exams section.

- an assignment that you have created on the assignment section.

- a checkpoint from the content section.

Alternatively, Click on **Create new grade** to create a new grading column. Fill in the name, the description and the weight of your new grading column then click **Save.**

You can select the option **Multi reviewer grading** if you want for more than one person to grade your students. Shall we add peer reviewing ?

To add more grading columns click on the **+** button or **New Grade** button.

Fill in the grades of your students and click on Export to CSV if you want to download your gradebook.

Note: The student average score will be calculated automatically once you have entered all grades. If a grade cell is left empty it will not affect the average score.

On the other hand, if you wish to give a particular student the grade 0 make sure you type in 0 in his corresponding cell to take that grade in the overall calculation of his average score.

* + Chat section

In the Chat section you can engage with students and view their group chat discussion within the course.

To get stared, click on the button **New chat room.** A chat of between your class students enrolled in the course and their professors will be created automatically.

1. **Managing Courses**

Managing courses in easyclass allows you to create, organize, and publish courses, making them accessible to students for enrollment and learning.

Courses can have e-learning content associated with them that student can take in a self paced environment. In this section your will learn how to create courses, how to optionally add e-learning content to a course and how to manage your courses between private and public classes.

* + Accessing Course management

To manage courses in Easyclass, navigate to the **"Studies"** section in the navigation bar and select **"Courses.**" Here, you will find a list of all the courses you have created which you can search and filter by course code, title, or grade levels. This makes it easy to find and manage your courses efficiently.

* + Viewing and filtering courses

You can easily search for a specific course by entering its code, title, or grade level in the search bar. Additionally, you can filter courses based on grade levels, making it easier to organize and manage courses according to the intended audience or academic level.

* + Creating a new course

To create a new course, click on the **"New Course"** button.

You will be prompted to fill in the course details, including the course name (required), grade level (optional), color code (optional), description (optional), and cover image (optional).

Once you have filled in the necessary information, click **"Save"** to create the new course.

* + Managing Course details

When managing a course, you have several options available. Hover and Click on one of the four tools icons available for each course to perform specific actions:

1. **Manage Content** Icon: to add a self paced, E-learning version of the course to enhance the learning experience for students. You can organize your content by Modules, activities, and checkpoints.

a. Modules can have an overview and cab be locked until a certain date. Click on the settings of a module to access these options. To add more modules click on Add module

b. Activities can be comprised of Quizzes, Rich text, documents, videos, Images, Audio. Select the type you want to add and create it or import an already existing one. More details in (link to tools >E-learning blocks).

c. Checkpoints are comprised of sections. Click on the settings of a checkpoint the click New Section to add a section. To create a check point follow these steps:

1. Fill the instructions for the checkpoint

2. Add the number of attempts allowed for the student to take the checkpoint

3. Add the passing score for the checkpoint

4. Create the sections of the checkpoint. Fill in the sections with blocks in a similar way to creating an activity. More details in (link to tools >E-learning blocks).

1. **Manage Classes** Icon: to View the availability of the course in the public or private classes the course was assigned to. The Public classes are open to enrollment for all visitors, while private classes are exclusively managed by administrators.

For Public classes, click on the **Settings** Icon to set the difficulty level of the E-learning content associated with the course, define skills to gain, describe what students will learn, and add frequently asked questions about the course.

Finally, specify the number of weeks and recommended hours per week for the course.

1. **Edit course details** Icon: to Edit course details after creation
2. **Delete course** Icon: to Delete course
   * Publishing a Course

When publishing a course in Easyclass, you have the option to attach it to an existing private class, limiting access to only the students enrolled in that class. Alternatively, you can create a new public class, allowing for self-enrollment by students. It's important to note that only one public class can contain the course at a given time.

Steps to Publish a Course:

Select a course and click on the **Manage Classes** Icon.

1. Click on the **Publish** button and select an Academic Period to which it belongs. This helps organize courses and classes based on the academic calendar.
2. Choose the Class Type:

* **Public Class**: Select this option to create a new public class for the course. Public classes allow for self-enrollment by students, making the course accessible to a wider audience.

When choosing this option you will be prompted to type in the name of the class that will be created and the start and end dates of the course which are the dates where the course will be visible to the class.

* **Private Class**: Choose this option to attach the course to an existing private class. Private classes are exclusively managed by administrators, and only students enrolled in the class have access to the course.

When choosing this option you will be asked to choose the already existing class you want to add the course to.

1. Publish the course : Click **"Save"** to publish the course. The course will be attached to the selected class type and will be visible to students accordingly.

By following these steps, you can easily publish a course in easyclass and manage its availability to students. Whether you choose to create a new public class or attach the course to an existing private class, Easyclass provides flexibility in organizing and delivering courses to students.

1. **Managing Programs**

Managing programs in Easyclass using the Hierarchy Module Organization approach provides you with the flexibility to organize your programs in a way that best suits your needs.

Whether you are creating a new program or reorganizing an existing one, this approach allows for easy customization and organization.

* + Accessing Program Management

To manage programs in Easyclass, navigate to the **"Studies"** section in the navigation bar and select **"Programs."** Here, you will find a list of all the programs you have created, which you can view and edit as needed.

* + Creating a new program

To create a new program, click on the **"New Program"** button.

Enter the name of the program and click **"Save."** This will create a new program that you can then organize into modules using our Hierarchy Module Organization approach.

* + Managing program modules

To organize your program, you can create modules. Click on the **"New Module"** button to add a new module. You can then click on a module to rename it and use the up and down buttons to reorganize the modules.

Additionally, you can use the left and right buttons to set an indentation for the module, making it a sub-module of the module above it. This approach allows you to create a hierarchical structure for your programs, with the flexibility to name modules and organize them in any desired manner.

* + Adding courses to modules

Within each indentation, you can add courses to the module. This allows you to further organize the program by grouping related courses together.

Each course can be assigned to a specific module, making it easy to track and manage the program content.

1. **Managing Admissions**

Managing admissions campaigns in Easyclass allows you to start admission campaigns and organize and track admissions exams, manage supervisors and candidates, and create gradebooks to track candidate performance.

This comprehensive approach streamlines the admissions process and helps ensure a smooth and efficient admissions experience.

* + Accessing Admissions Campaign Management

To manage admissions campaigns in Easyclass, navigate to the **"Studies"** section in the navigation bar and select **"Admissions."** Here, you will find a list of all your admission campaigns, which you can view and edit as needed.

* + Creating a New Admissions Campaign

To create a new admissions campaign, click on the **"New Campaign"** button.

Enter the title of the campaign, assign a code and a color code (optional), select an academic period, and set the start and end dates of the campaign.

Click **"Save"** to create the campaign.

* + Managing an Admissions Campaign

To manage an existing admissions campaign, click on the title of the campaign you want to manage. This will take you to the campaign management page, where you can perform various actions:

-**General** tab: Click on this tab to:

1. Use the calendar to view scheduled admissions exams or schedule a new exam.
2. Add supervisors by clicking on the "Add Supervisor" button and selecting supervisors from the list of professors.
3. Add candidates by selecting them from the list of students or using the bulk import function.

-**Exams** tab: Click on this tab to:

Create new admission exams by clicking on the **"New Exam"** button.

The Exam can be an online or offline exam.

To add an offline exam, fill the following informations:

A. Type in the title or name of the exam

B. Select the start date of the exam

C. Select the duration of the exam

Optionally, select a classroom for the exam.

To add an Online test select the option **Online Test.** You will have to create an online exam on easyclass by going to the tools section in the navigation bar and selecting tests. More details in: (link to tools>tests).

Type in the name of the exam you have created then attach your online test and select the security measures for your exam.

Optionaly, you can mix between our two proctoring features:

- Screen Share: Select this option if you want our software to take pictures of the students screen every few minutes.

- Webcam: Select this option if you want our software to take pictures of your students webcam every few minutes.

Note: If you choose one of these proctoring features. Every student will have to allow for Screen sharing and/or Webcam sharing before getting access to the exam.

Please make sure all your students are aware of this for them to have a hassle-free examination experience.

Once you have created your admissions exam you can perform the following actions:

1. Click on the **edit** icon to grade your admissions exam
2. Click on the **settings** icon to change your exam details
3. Click on the **pencil** icon to edit the content of your exam.

-**Gradebook** tab: Click on this tab to create a campaign gradebook

Track your candidates progress and manage your admissions exam grades and share or export them in a CSV file.

To get stared, click on the button **Create new gradebook**. A list of your candidates enrolled in the admission campaign will be created automatically.

Click on **import existing grade** to import grades from an online or offline admission exam that you have already created in the exams section.

Alternatively, Click on **Create new grade** to create a new grading column. Fill in the name, the description and the weight of your new grading column then click **Save**.

You can select the option Multi reviewer grading if you want for more than one person to grade your students. Shall we add peer reviewing ?

To add more grading columns click on the **+** button or **New Grade** button.

Fill in the grades of your students and click on Export to CSV if you want yo download your gradebook.

Note: The student average score will be calculated automatically once you have entered all grades. If a grade cell is left empty it will not affect the average score.

On the other hand, if you wish to give a particular student the grade 0 make sure you type in 0 in his corresponding cell to take that grade in the overall calculation of his average score.

**-Candidates** tab: Click on this tab to add candidates to the campaign in the same way you can from the General tab.

1. **Managing People**

Managing people in Easyclass allows you to efficiently manage accounts, students, and professors, ensuring a smooth operation of your educational institution.

* + Accessing People Management

To manage people in Easyclass, navigate to the **"People"** section in the navigation bar. Here, you can access different sections to manage accounts, students, and professors.

* + Managing Accounts

Click on **"Accounts"** to see a list of all users. Use filters or search functions for accounts based on various criteria, including their names, email, and status of their account.

You can also check every students last login on the platform and export any list of students using the **Export to CSV** button.

* + Creating Accounts

From the Accounts page, navigate to the **"Create Account"** page to create accounts manually or use the bulk import function to create multiple accounts at once.

1. Manually Creating an Account

1-Fill in User Information: Enter the first name, last name, and email of the user you want to create.

2-Assign a Role: Choose a role for the user from the available options: student, moderator, or admin.

3-Save account: Click **Save** to create the account. The new user will receive emails with instructions to access the platform.

1. Bulk import

1-Choose Role: Select the role that all users in the bulk import will have. Note that to do a bulk import, all users must have the same role.

2-Download CSV Template**:** Click on the **"Download"** button to download a CSV template.

3-Fill in CSV Template: Fill in the first name, last name, and email of the new users in the CSV template.

4-Upload CSV: Click on the designated area or drag your filled CSV file to upload it.

5-Preview (Optional): Click on **"Preview"** to review the users in the CSV and ensure there are no errors.

6-Save: Click **"Save"** to create all the users. They will receive emails with instructions to access the platform.

* + Managing students

Click on **"Students"** to see the all your students cards. From here, you can send them an email or view their profiles.

Click on **View profile** to select and navigate to a student profile.

To edit the student infromation click on **Edit Student Details**

The student profile also contains three sections:

**General:** A dashboard that displays:

1. Student information
2. Classes the student is enrolled in
3. KPIs on grades, attendance and progress.
4. Events scheduled for the student.

**Invoices:** A page to view invoices related to the student or create a new invoice for the student. TBD with Mehdi to fully understand the logic and correct lorem ipsum

**Documents:** Access all documents the student can view in their profile.

* + Managing professors

Click on **"Professors"** to see all your professors cards. From here, you can send them an email or view their profiles.

Click on **View profile** to select and navigate to a professor profile.

To edit the professor infromation click on **Edit Instructor Details**.

The professor profile also contains two sections:

**General:** A dashboard that displays all professor information, KPIs on their work, and events scheduled for the professor.

**Analytics:** Shows the professor's daily work hours over time.

1. **Managing fees and invoicing**

Managing fees and invoicing in Easyclass allows you to track revenue, manage invoices, set up new fees, and assign fees to students with ease.

* + Accessing Fees and Invoicing Management

To manage fees and invoicing in Easyclass, navigate to the **"Fees and Invoicing"** section in the navigation bar. From there, you can access your **"Invoices"** and **"Fees"**.

* + Invoices

In this page you can view and manage all your invoices.

Select a date range to view your revenue, outstanding payments, and overdue amounts for that period. Take advantage of the smart analytics to track your invoices over time.

When you select a date range, a list of all your Invoices is displayed, each including the following elements:

1. Invoice Number: Unique identifier for the invoice.
2. Issue Date: Date the invoice was issued.
3. Due Date: Date by which the invoice should be paid.
4. Issued To: Person to whom the invoice was issued.
5. Amount: Total amount of the invoice.
6. Status: Current status of the invoice (paid, partially paid, or unpaid).

On each of the individual Invoices you can perform the following actions:

1. Click on the **"cash"** icon to add a payment to the invoice. Enter the amount of the instalment, select the method of payment, and set the date of payment.

The status of the invoice is automatically updated based on the changes made.

1. Click on the **"print"** icon to print the selected invoice. The invoice will be automatically generated. You can click on **options** then **print** to print the invoice. Or click on **options** then add **payment** if you wish to add a last minute instalment before printing the invoice.
   * Fees

In this page you can view, manage, and set up all your school fees.

All your school fees will be listed in this view. To set up a new fee click on **"New School Fee".**

1. Enter the name of the fee, optionally select a school period, and add any tags to organise your work.

2. Set the installment cost of the fee

3. Select the type of fee. **One-off Fees** are paid once and **Periodic Fees** are paid recurrently.

If you choose a periodic fee select the start and end date of the fee and set the recurring interval of the fee.

You can also manage any individual fee on your list by performing the following actions:

* + - 1. Click on the **"Edit"** button to edit the fee.
      2. Click on the **"Assign"** button to assign the fee to one or many students.Choose to start the installment of the fee on the fee start date, starting the month your are on, or starting next month.
      3. Click on the "Delete" button to delete the fee.

Any invoice created or fee that you have assigned to a student will be automatically displayed on the student profile.

1. **Working with tools**
2. **Troubleshooting**
   * Common issues and solutions.
   * How to contact support.