

# Cohorting Guidelines

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The purpose of this document is to provide guidelines and general usage tips on the cohorting feature within edX.

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## Enabling Cohorting

The below directions outline how to enable cohorting within a course. Please work with your edX PM to either have them set it up, or assist you in setting it up.

### Advanced Settings

Within Studio, go to Settings -> Advanced Settings, and there are two pertinent settings modifiable via Studio's Advanced Settings page for the course:

1. 'discussion\_topics': Sets the non-courseware-specific topics. Format is {"Topic Name": {"id": "some\_unique\_id"}}. See [8.3.1.2](#) in the docs for more details.
2. cohort\_config: A dictionary with the following Policy Keys:
  - 'cohorted': Boolean (True/False), indicating whether the course is cohorted
  - 'cohorted\_discussions': List of strings containing ids corresponding to those in discussion\_topics for topics that should be cohorted; this cannot control topics from discussion modules, which are always cohorted
  - 'auto\_cohort': Boolean, indicating whether students should be automatically cohorted
  - 'auto\_cohort\_groups': List of strings containing names of cohorts to which students should be automatically assigned

**Example:**

```
{  
  "auto_cohort_groups": ["General"],  
  "auto_cohort": true,  
  "cohorted_discussions": [  
    "i4x-edX-ZK_TEST_101-course-1T2014_TestCohort1",  
    "i4x-edX-ZK_TEST_101-course-1T2014_TestCohort2"  
  ],  
  "cohorted": true  
}
```

Interpretation: This activates cohorts in the course (*"cohorted": true*), automatically enrolls people not currently into a cohort (*"auto\_cohort": true*) into the "General" cohort (*"auto\_cohort\_groups": ["General"]*), and reserves to discussion topics for cohorting purposes (*"cohorted\_discussions": [ "i4x-edX-ZK\_TEST\_101-course-1T2014\_TestCohort1", "i4x-edX-ZK\_TEST\_101-course-1T2014\_TestCohort2" ]*).

## Cohort Configuration on Instructor Dashboard

### Cohort Summary and Adding Cohorts

The "Manage groups" tab of the legacy Instructor Dashboard allows course staff to manually manage cohorts. When the tab is first loaded, it contains a section titled "Cohort groups" with a "Show cohorts" button. Clicking the "Show cohorts" button activates the cohort list view.

The screenshot shows the 'Instructor Dashboard' with a navigation bar containing links for GRADES, ADMIN, FORUM ADMIN, ENROLLMENT, DATADUMP, and MANAGE GROUPS. The 'MANAGE GROUPS' link is highlighted in yellow. Below the navigation bar is a 'List beta testers' button. A text area for entering beta tester usernames or emails is present, with 'Remove beta testers' and 'Add beta testers' buttons to its right. The 'Cohort groups' section features a 'Show cohorts' button, which is pointed to by a red callout: 'Click to show all cohorts'. Below this is the 'Cohorts in the course' section, which lists 'Team A', 'Team B', 'Team1', and 'General'. A red callout points to 'Team A' with the text: 'Click to view the members within a cohort (bug: only shows the first 100)'. At the bottom, there is an input field for adding a cohort name and an 'Add cohort' button, with a red callout stating: 'Add a cohort name to the text box and click 'Add Cohort' to create a new cohort.'

### Cohort Details and Adding Members

The cohort detail view displays the usernames and email addresses of up to 100 of the users in the cohort. The table also has a "Name" column, but that is currently always empty. Each user

has a "remove" link that will cause the user to be removed from the selected cohort. If the 'Auto Cohorting' feature is not enabled, then this should not be done in a running course without automatic cohorts enabled, as the user will be left without a cohort.

The detail view also has an interface for manually adding students to the selected cohort. Entering a list of comma-separated usernames and/or email addresses in the text box and clicking "Add cohort members" will cause the system to attempt to add the specified users to the selected cohort; a message will be subsequently be displayed for each user indicating the result of the operation for that user with four possible results: the user was already present in the cohort, the user was added to the cohort, the user was in another cohort (and now moved to the selected cohort), or the user was unknown.

Clicking the "Show cohorts" button will return to the cohort list view.

The screenshot shows a web interface for managing cohorts. At the top, there is a section titled "Cohort groups" with a "Show cohorts" button. Below this, the "Members of Team A" section is visible, featuring a table with columns for "Name", "Username", and "Email". A single row is shown with the entry "ZK\_Test1 zachary+1@edx.org" and a "remove" link. Below the table, there is a text input box for adding users and an "Add cohort members" button. Red callout boxes with arrows point to these elements, providing instructions: "Clicking this will hide the cohort details, and show the full list of cohorts" points to the "Show cohorts" button; "Lists cohort members, and the option to remove them from the cohort." points to the "remove" link; and "Once usernames or emails are added in the text box, click 'Add cohort members' to add the listed users" points to the "Add cohort members" button.

Cohort groups

Show cohorts

Clicking this will hide the cohort details, and show the full list of cohorts

Members of Team A

Name	Username	Email
ZK_Test1	zachary+1@edx.org	<a href="#">remove</a>

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Add users by username or email. One per line or comma-separated.

Add cohort members

Once usernames or emails are added in the text box, click 'Add cohort members' to add the listed users

## Working with Cohorts

There are a number of variations in which topics are or are not visible to depending on their access level.

### Scenarios

Three scenarios for adding, viewing, and replying to posts are listed below. These are examined from the Forum Moderator or Admin perspective, and the user's perspective.

- **Scenario 1: Adding a post to a topic which is *not* cohorted from the 'Discussion' tab**
  - Moderator / Admin: A cohort cannot be specified for a post. This means that all users will see the post, and can respond to it.
  - User: The user will be able to create posts visible to all other users, regardless of cohort. They will also be able to see and respond to all posts in this topic.
- **Scenario 2: Adding a post to a topic which *is* cohorted from the 'Discussion' tab**
  - Moderator / Admin: A cohort or 'All Groups' must be specified for the post using the 'Make visible to' drop down (see screenshot below). This means that users within the specified group can see and respond to the post.  
*Note*: There is a bug where, if the Moderator / Admin posts to a module (i.e. within a 'Week 1' topic from the Discussion tab, the post will only be visible to the Moderator / Admin's cohort).
  - User: Users cannot specify a cohort to post to. If a user posts in a cohorted topic, only those from their cohort can see or respond to the post.
- **Scenario 3: Adding a post to a topic which is cohorted from the 'Discussion' component within a Unit (*By default, all posts related to a Discussion component are cohorted*)**
  - Moderator / Admin: A cohort or 'All Groups' must be specified for the post using the 'Make visible to' drop down (see screenshot below). This means that users within the specified group can see and respond to the post.
  - User: Users cannot specify a cohort to post to. If a user posts in a cohorted topic, it will only those from their cohort can see or respond to the post.

## Specifying which Cohort can see a post in the Discussion tab

As seen by a Admin / Moderator

**Create new post about:**

Cohorted 1

follow this post  
 post anonymously

Make visible to: General

For Moderators / Admins:  
Use this box to specify which cohort can see and respond to this post.

Title

B / | 🌐 “ 101 010 | 📄 | ☰ | ☰ | ☰ | ☰

PREVIEW

Add post Cancel

## Specifying which Cohort can see a post in the Discussion component

As seen by a Admin / Moderator

Hide Discussion New Post

Title

B / | 🌐 “ 101 010 | 📄 | ☰ | ☰ | ☰ | ☰

PREVIEW

Add post Cancel

follow this post  
 post anonymously

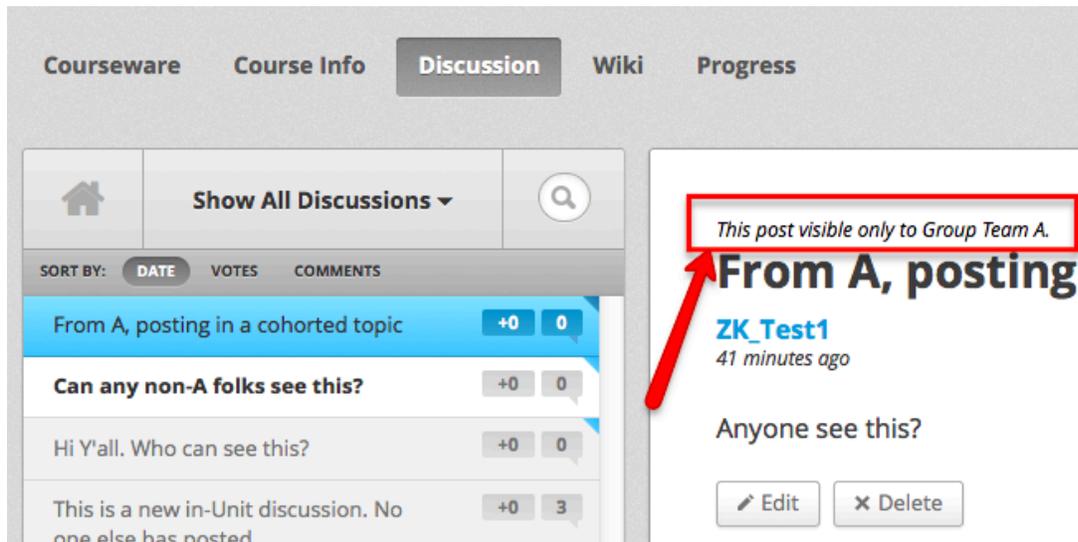
Make visible to: All Groups

## Identifying cohorted posts

Both admins, moderators, and users can see which posts are only visible to certain groups. They can see this by looking above the title of a post. This is true in both the 'Discussion' tab, and for Discussion components within a Unit. See screenshots below.

*Note:* If there is no text above the title of a post, it means that post is visible to all users.

## Identifying which Cohort can see a post in the Discussion tab



## Identifying which Cohort can see a post in the Discussion component

*Note:* The first post in this discussion component is visible to all users. The second post is only visible to users in the cohort 'Team A'

