ProDev: Creating Course Requests V2

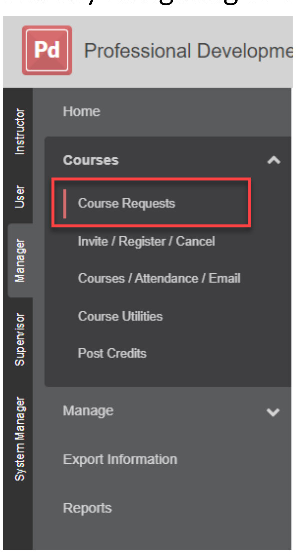
The PD Manager role has significant responsibilities across the entire course request, particularly in review and final approval. As a PD Manager, you will see all course requests on the site, not just the ones where you are listed as the course requester.

Three user types can enter course requests: instructors, Facilitators, and PD Managers.

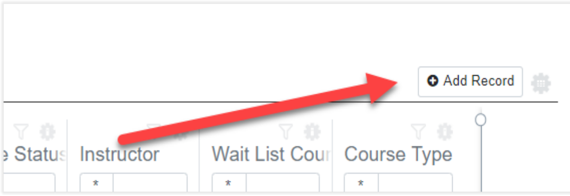
Course Request Workflow			
Status	**User**	**Action**	**Description**
Pending	Requester	Add & Configure	Requester enters initial details and configures the course across seven (7) subpages. (Info, Criteria, Limits, Credits, Materials, Links, Sessions).
Review	Requester	Submit for Review	Requester submits the completed course using the row action gear.
Open or Denied	PD Manager	Approve or Deny	PD Manager reviews, may edit, and then grants final approval (Open) or denial (Denied). Open makes the course available for participant registration.
Complete	PD Manager	Verify & Complete	After attendance is verified (Grades In Status), the PD Manager confirms data accuracy and sets the status to Complete, readying credits for posting.

Course Configuration

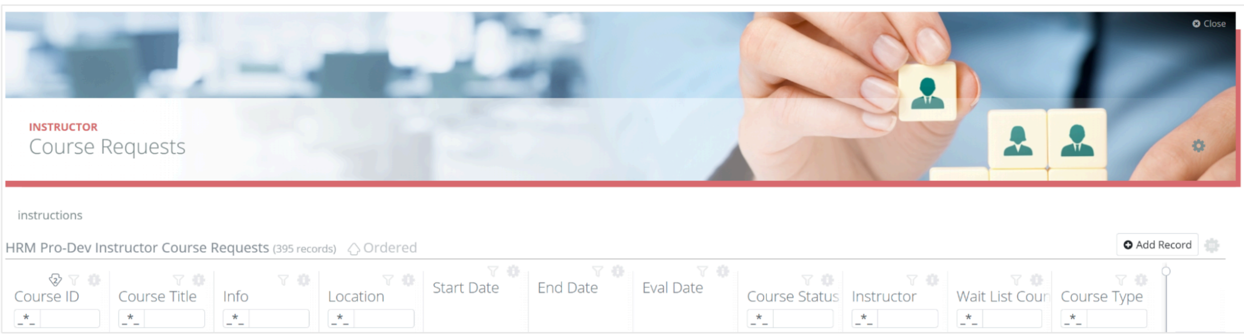
1. Start by navigating to **Courses** in the left navigation menu and selecting **Course Request.**



2. Select the "**Add Record"** button located at the top right. Once selected, this option displays a modal with various fields that must be completed to add a new course request.

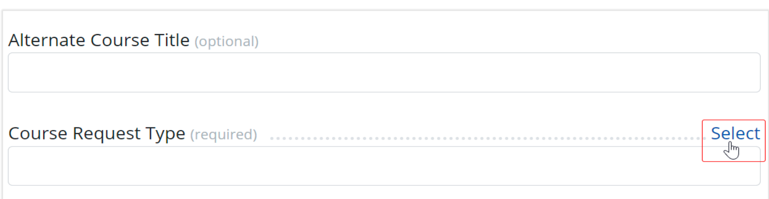


3. If you would like to filter through the course requests, you can do so to obtain a detailed breakdown of this information and what each section means. Visit the Explanation of Fields - Filtering section.



4. We can see in the example **hyperlinks.** Selecting this option will display a pre-configured set of additional options for you to choose from.

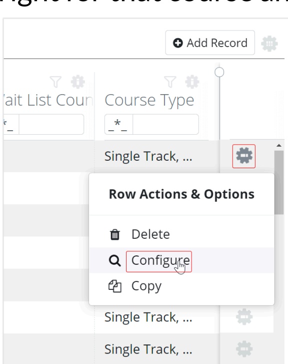
5. Once you have located the course request type, click the **checkmark to proceed.** The same method can be applied to all available options, which are indicated by a hyperlink. All fields marked as required must be completed before proceeding.



6. Once you have filled out all the required fields on this initial Info page, select **'Save'**. Your course will be added to the list of existing Course Requests with a status of **Pending**.

Configuring a Course Request

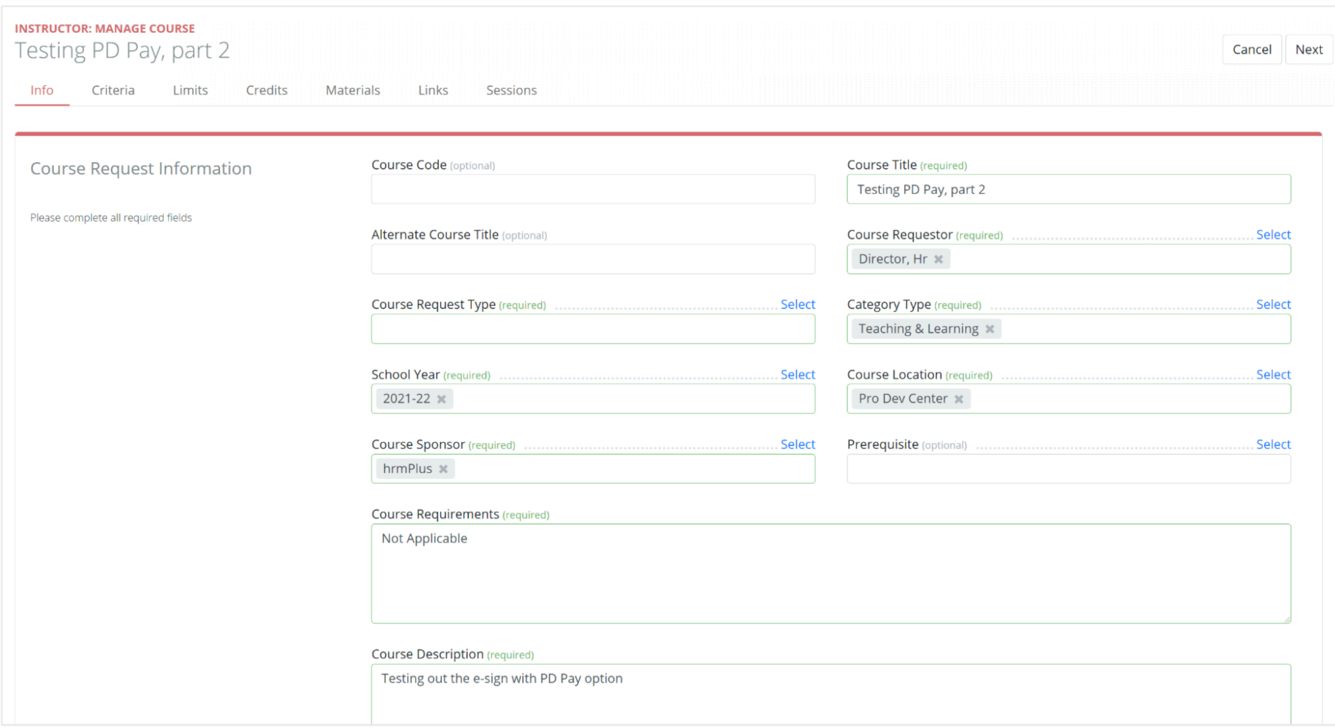
1. Locate the course you would like to configure, then select the **Row Actions & Options Gear** to the far right for that course and select **Configure**.



2. Once you do this, you will be brought to a new page. This page will have seven different pages, referred to as "subpages".
    a. **Info**
    b. **Criteria**
    c. **Limits**
    d. **Credits**
    e. **Materials**
    f. **Links**
    g. **Sessions**

Info Subpage

You will see the default page, already completed. Here, you will find all of the general information about any given course, such as the course title, course requester, category type, school year, course location, course sponsor, and course description, among various other fields.



After verifying and making any necessary changes to the information page, proceed to the next tab to review the criteria.

Criteria Subpage

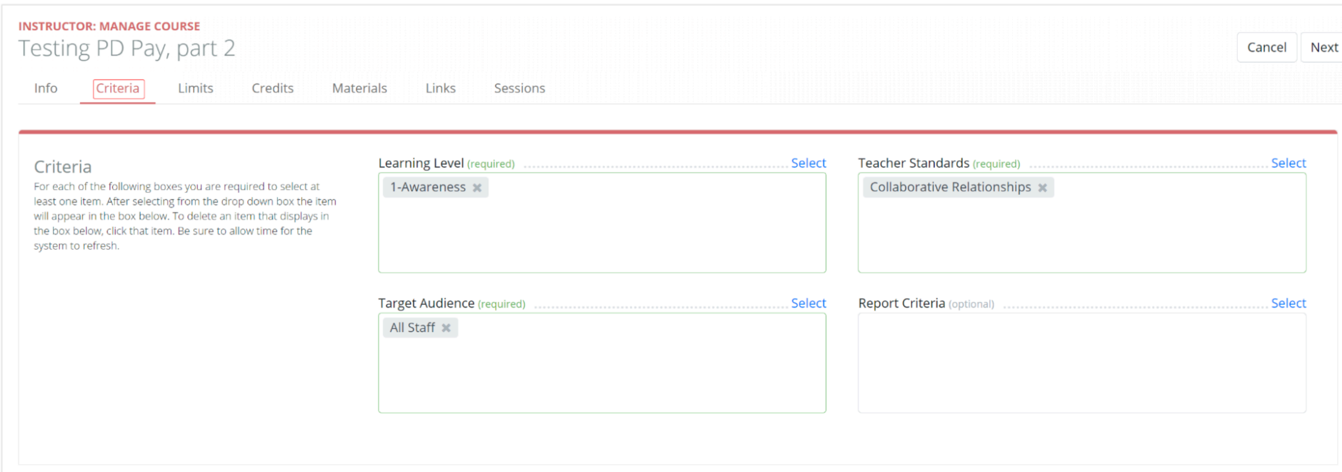
This page identifies criteria associated with the course and serves two purposes:

1. Users can search for courses based on these criteria.
2. Reports can be generated using these criteria sets.

Clients can establish and use up to nine (9) criteria items and can decide which ones can be searchable in Course Registration. Additionally, a 10th criteria item, Report Criteria, is visible for all systems. <u>You must select at least one item for each criteria box except for the Report Criteria.</u>

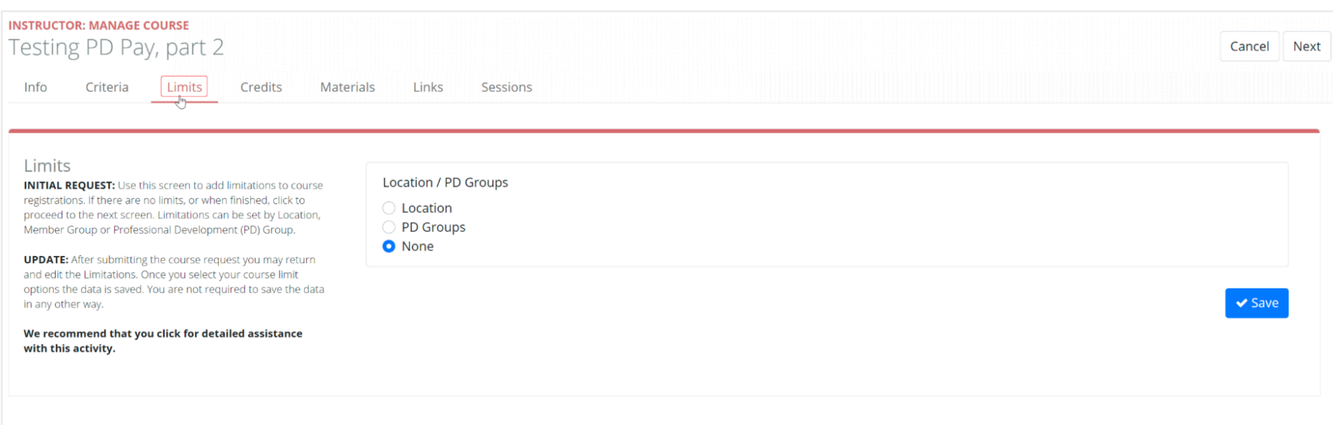
These options can be edited at will, and additional parameters can be added by using the hyperlink located at the top right of each text field. This will bring up a modal that will allow you to add additional information.

After completing the criteria, continue to the next tab for Limits.



Limits Subpage

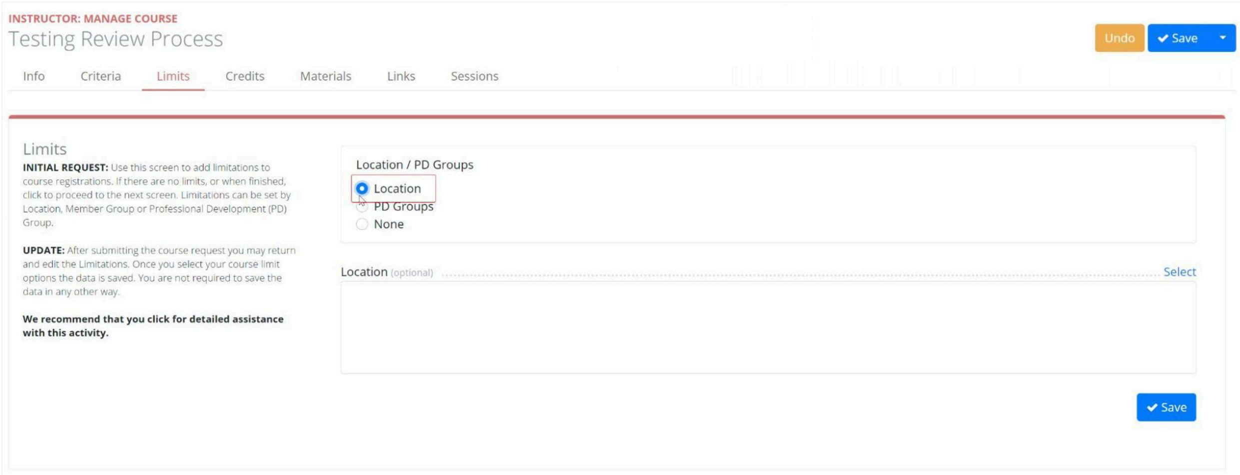
This page sets limits on which participants can register for the course. If there are no limits on the course, click **Save** and then go to **Credits**, as 'No Limits' is the selected default. However, you can choose to set limits to the course by either Location, PD Group, or Member Group (for Coop Clients).



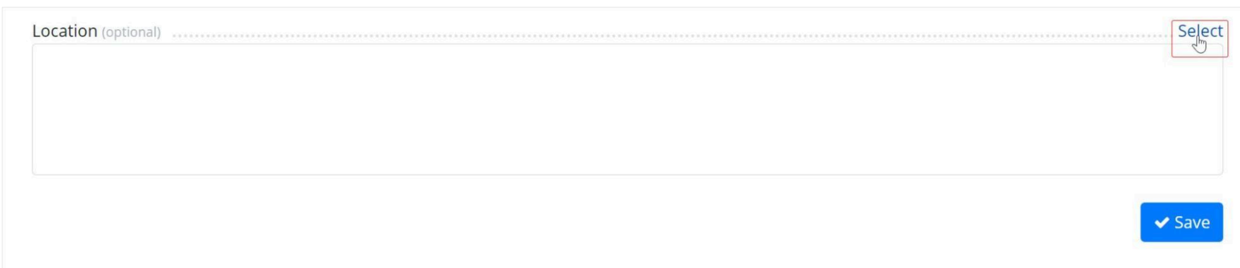
Limit by Location

If you limit by location, only users who have the same location in their Personal Information (My Records) will be able to register for the course. Other users will see the course listed in Course Registration, but the register button will be hidden from view.

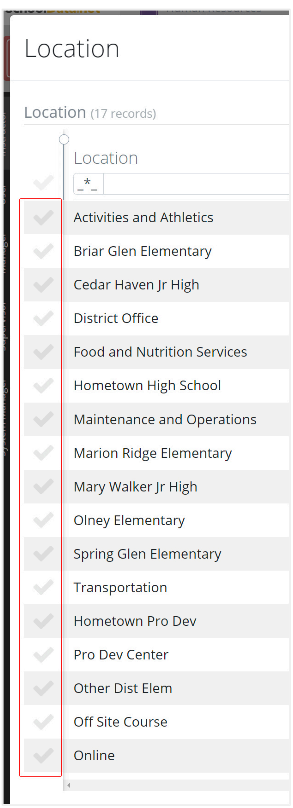
1. Click "**Location**".



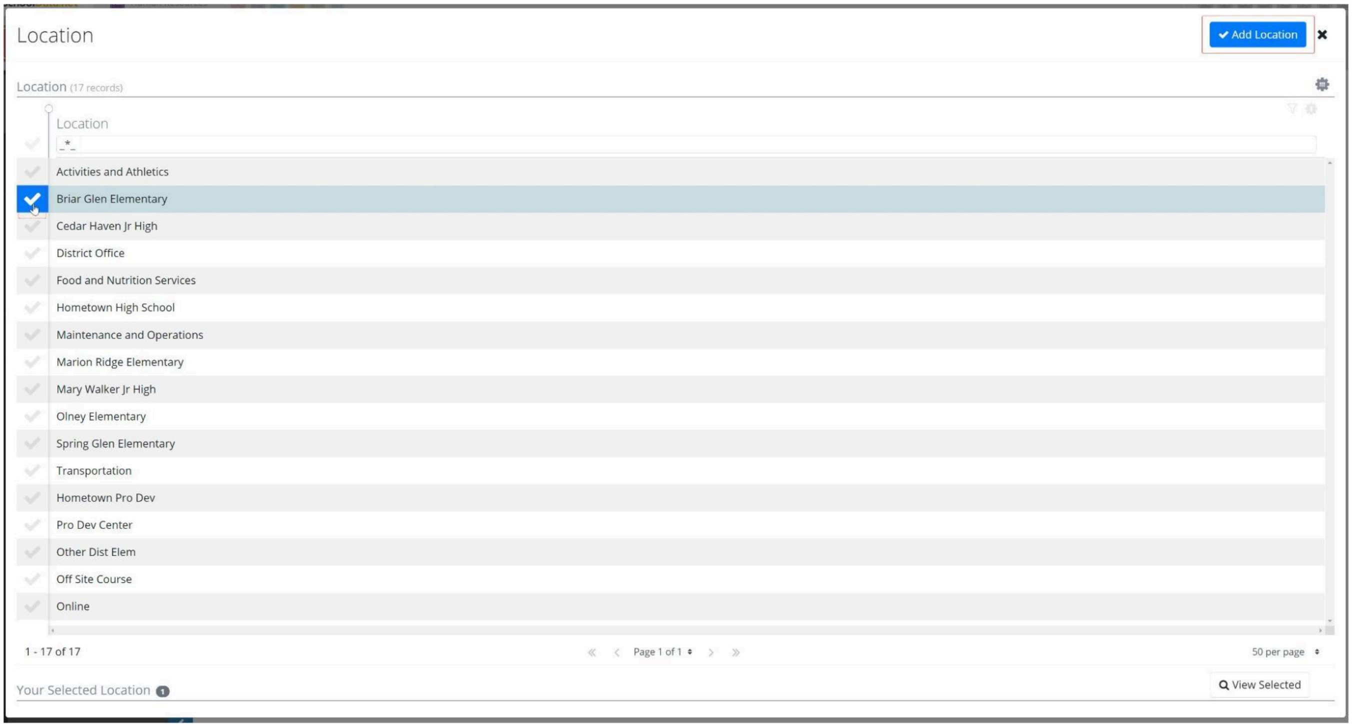
2. Next, you will need to specify the location. This can be done in the box that is located underneath the selection you just made. Select the hyperlink that is labeled "**Select**". This will bring up an additional modal where you can select from a pre-populated list of locations.



3. Click on the **check mark** next to the location you would like to specify.



4. Once you have made your selection, click on the **"Add Location" button** located at the top right of the modal to return to the "Limits" page.

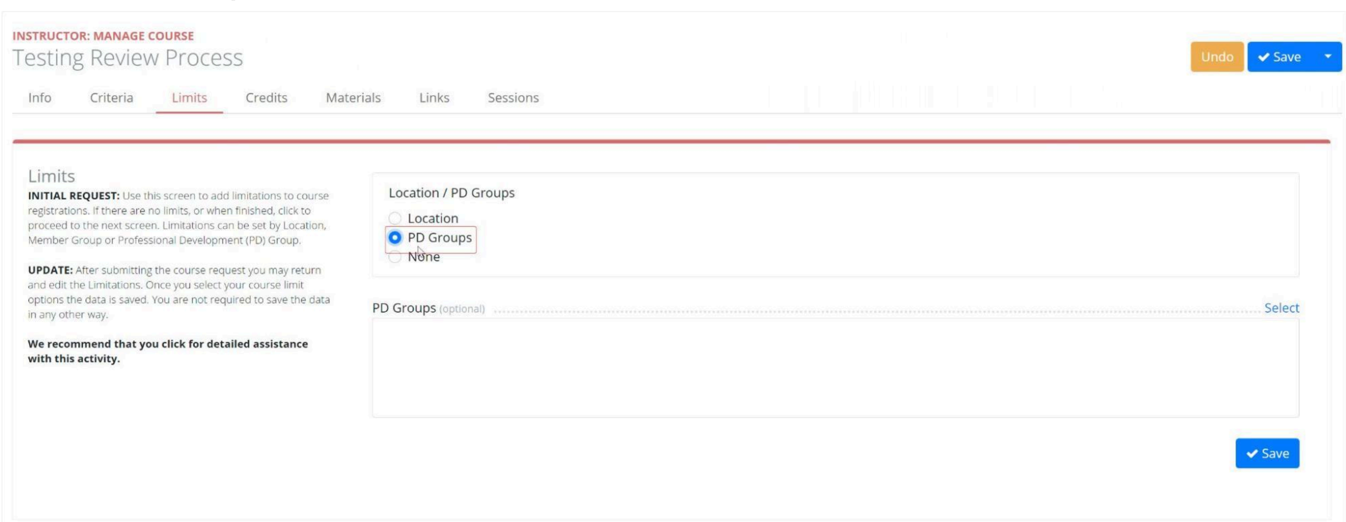


Limit by PD Group

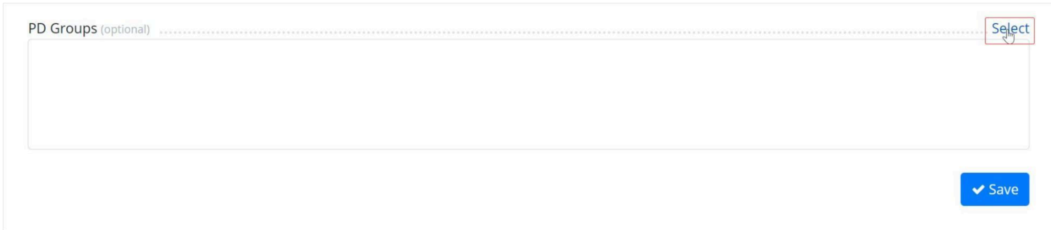
PD Groups are associated with the positions. Select as many PD Groups as needed. If you inadvertently select a PD Group, click the name of the PD Group in the display box to remove it.

NOTE: You must have PD Groups set up in the tables before using this option. Contact support@schooldata.net for assistance with this setup activity.

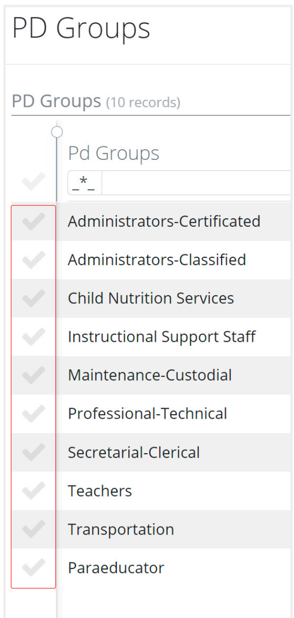
1. Click on "**PD Groups.**



2. Next, you will need to specify the PD Groups. This can be done in the box that is located underneath the selection you just made. Click "**Select**". This will bring up an additional modal where you can select from a pre-populated list of PD Groups.



3. Click on the **check mark** next to the PD Groups that you would like to specify.



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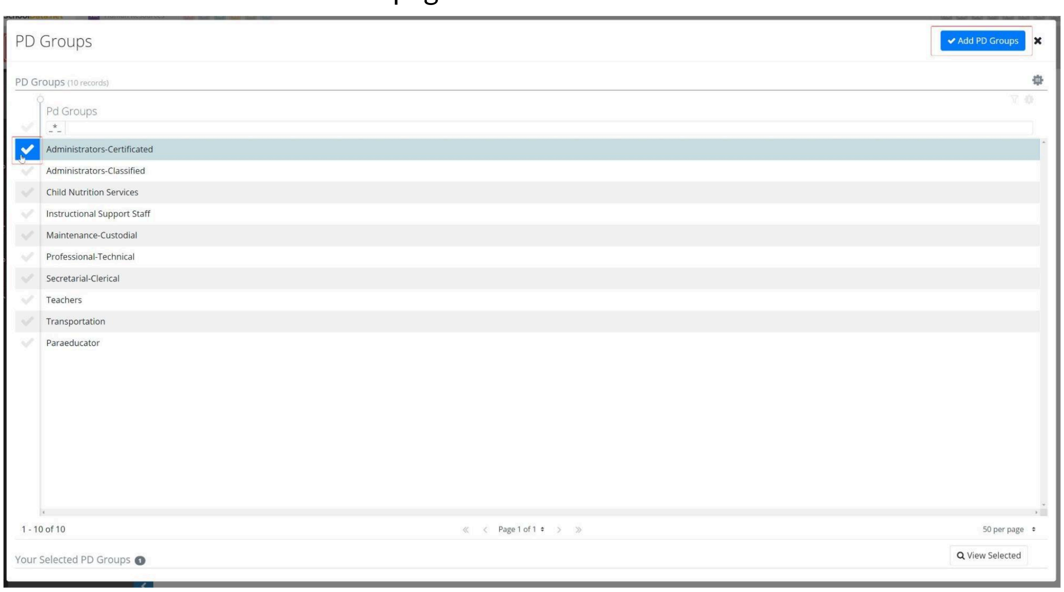
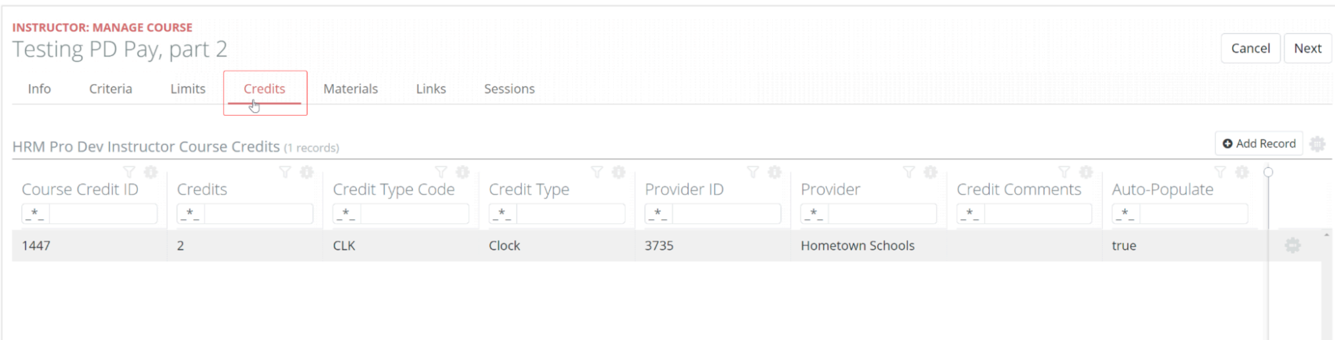
4. Once you have made your selection, click on the "**Add PD Groups**" **button** located at the top right of the modal to return to the "Limits" page.



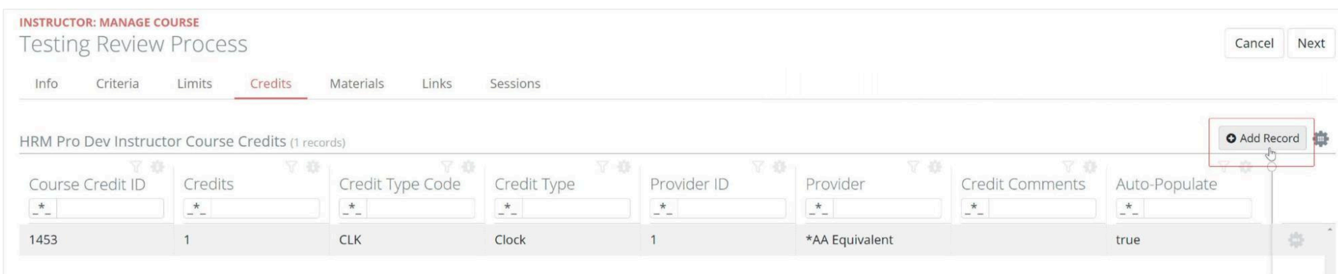
5. After completing the limits, continue to the next tab for Credits.

Credits Subpage

The credit subpage will identify the type of credit available for any given course. You can have multiple credit types. When users register for a course, they can select from available credit types. The specific credit types offered are set up during the installation, but additional credit types can be added at any time.



1. To add credits, click **Add Record** at the top right.



2. Next, fill out the resulting form and click the "Validate" button at the top right.

3. Enter the credit data as shown in the example above, using this information as guidance:

Credit Type	Required. Select the credit type from the drop-down list.
Credits	Required. Enter the number of credit hours for this course.

Provider	Required. Select the credit type provider for this course. A default provider can be set up to auto-populate this field.
Credit Comments	Optionally, enter comments that are visible on the course detail report.
Auto-Populate	If checked, the selected credit type will automatically populate for the person registering. *A default can be set to check the box automatically. This default should only be used if the district offers only one credit type per course.

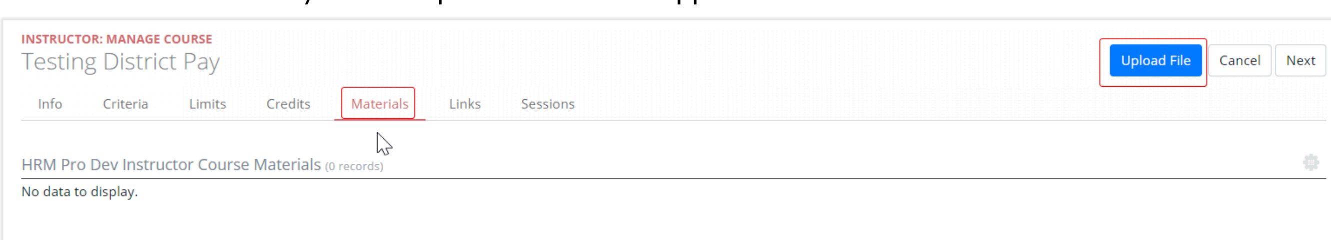
4. Click the **Save button** and add as many credit types as needed for the course.
5. You can delete a record by using the **Row Action Gear** next to any record and selecting '**Delete'.**
6. After completing the credits, continue to the next tab for Course Materials.

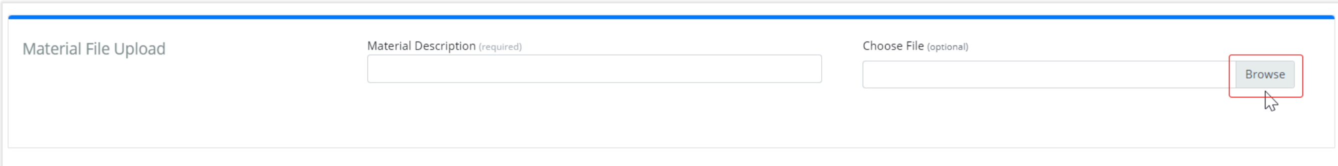
Materials Subpage

Optionally, materials may be uploaded and attached to the course. In Course Registration, users can click on a PDF icon to open the Course Detail Report. This report will include links to any uploaded materials. The Course Detail Report is also available in My Records, under My Courses, where users can view a list of courses for which they are enrolled and/or have completed.

To attach materials:

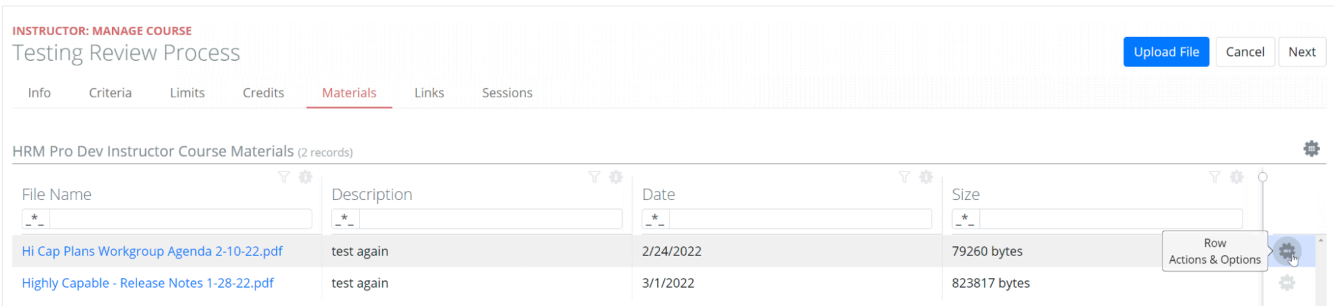
1. Click the **Upload File button**.
2. Add a material **description**.
3. Click **"Browse"** and navigate to the location on your computer, then open the file you wish to upload. **Note:** You may upload files with the following extensions: .doc, .docx, .pdf, .gif, and .jpeg. You cannot upload an Excel file; however, you can save it in a PDF format and then upload it.
4. The selected document will then appear in the Upload a File box below.
5. Click **Start.** The item you have uploaded will then appear in the table.





To Edit Materials

To edit or delete the uploaded material, you will navigate to the "**Materials**" subpage from the "**Manage Course**" section. Once there, you will use the "**Row Actions and Options**" located to the far right of the page.

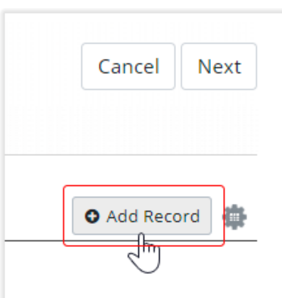


After completing the course materials, continue to the next tab for Course Links.

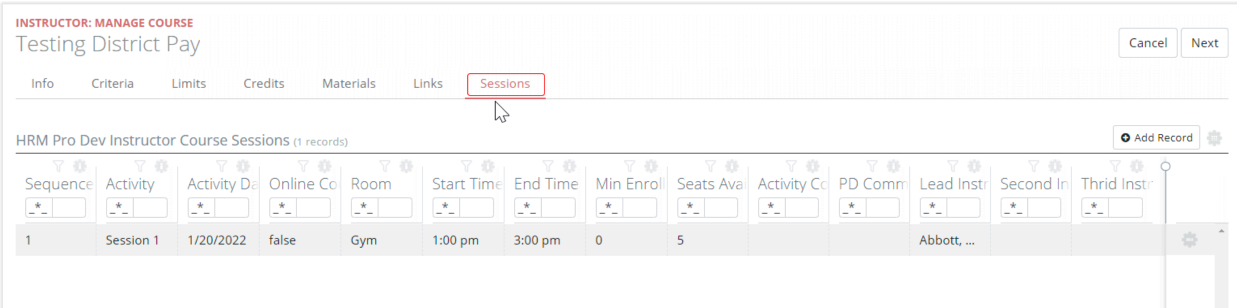
Links Subpage

Optionally, links to any URL, Google Docs, or YouTube videos can be attached to the course. In Course Registration, users can click on a PDF icon to open the Course Detail Report. This report will include the attached course links. These links are permanently linked to the course, and users can access this information whenever needed. The Course Detail Report is also available in My Records, under My Courses, where users can view a list of courses for which they are enrolled and/or have completed.

1. To attach a link, click the **+Add Record button.**



2. Enter a link **description**.
3. Copy and paste the link into the Location **URL box**.
4. Click **Save**. The link you have added will then appear in the table.



5. Use the **Row Action Gear** for any added link to **edit** or **delete** that link.

6. After adding any necessary links, continue to the next tab for Sessions.

Sessions Subpage

Remember that a single-session course can only have one session, whereas you must add at least two sessions for a multi-session course. For conference (multi-track, multi-session) courses, you must add at least one track, and at least one session for each track added.

The session options are as follows:

0 = Single Session Course
1 = Multi-Session Course
2 = Conference Course (Multi-Track, Multi-Session)
3 = Off-Site Registration Course.

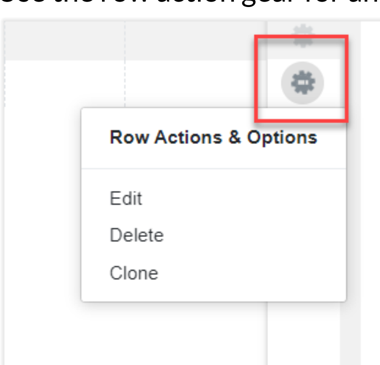
To add a new session:

1. Click the **+Add Record button.**
2. You will enter data, including the **session start and end times**, as well as the **number of seats available**.
3. Complete the required information and click **Save**.
4. The session you have added will then appear in the table.

Activity	Enter a name for the session.
Sequence	The sequence of sessions must run concurrently and cannot be duplicated.
Online Course	Choose True/False.
Room	Enter the room number or name of the room where the activity will take place.

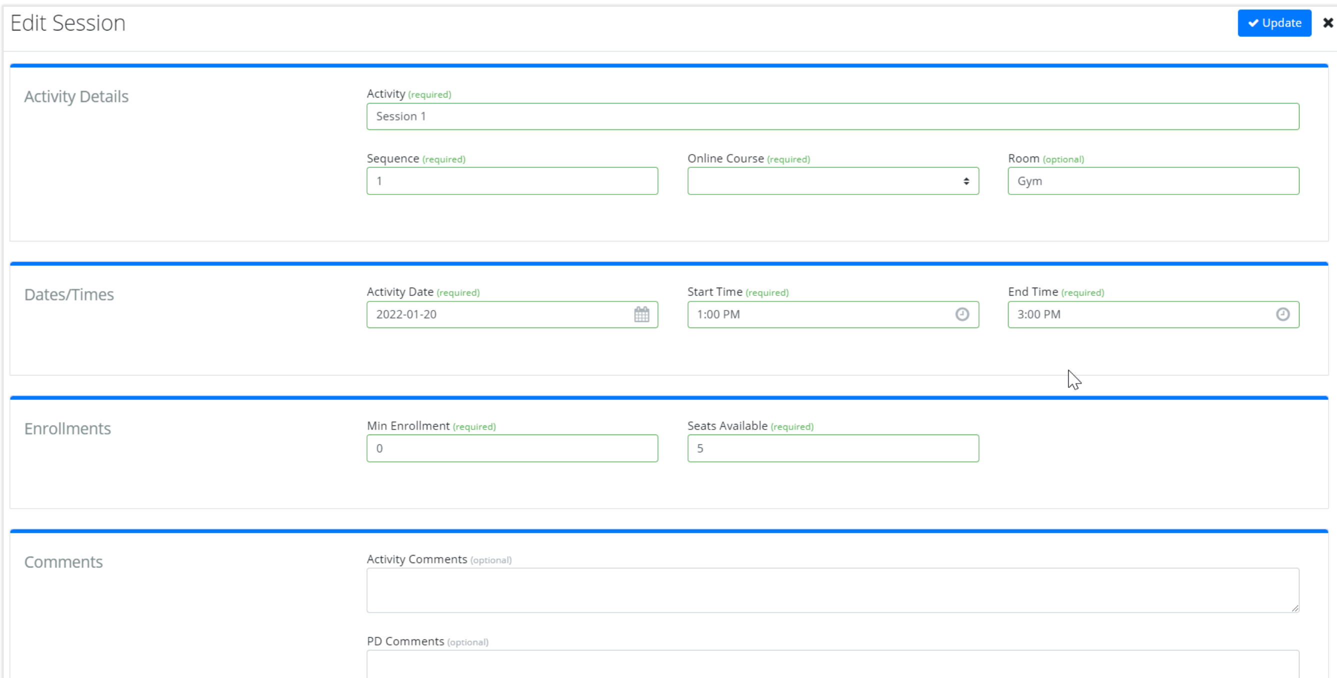
Activity Date	The Start date for the course will auto-populate, but this can be edited as needed.
Start Time	Enter the start time for this session.
End Time	Enter the stop time for this session.
Min Enrollment	Enter the minimum enrollment. The minimum is the minimum number of individuals that must enroll to prevent the session from being canceled.
Seats Available	Enter the number of seats available.
Activity Comments	Enter comments that will be visible to the participants.
PD Comments	Enter comments that will only be visible to PD Managers.
Lead Instructor	Typically, you will select the chosen lead instructor on the first page of the course request. However, this can be changed; however, the user listed on page one will lose access to this course under their instructor menu option.
Second Instructor	Optionally, from the drop-down menu, select an additional instructor. This user will have access to this course under their instructor menu options.
Third Instructor	Optionally, from the drop-down menu, select an additional instructor. This user will have access to this course under their instructor menu options.

5. Use the row action gear for any added session to edit or delete that session.



6. If it is a multi-session course, you will also see the Clone option, which will allow you to copy any session. To do this, simply use the "**Row Actions and Options**" **Gear**, located all to the right.

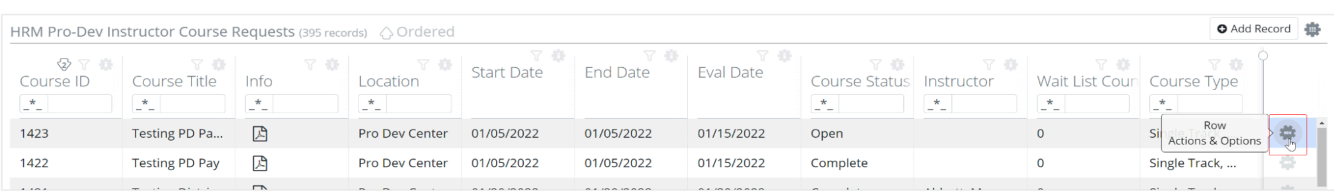
7. Once you have selected the edit button, you will be brought to a modal, where you can update various details regarding the session.

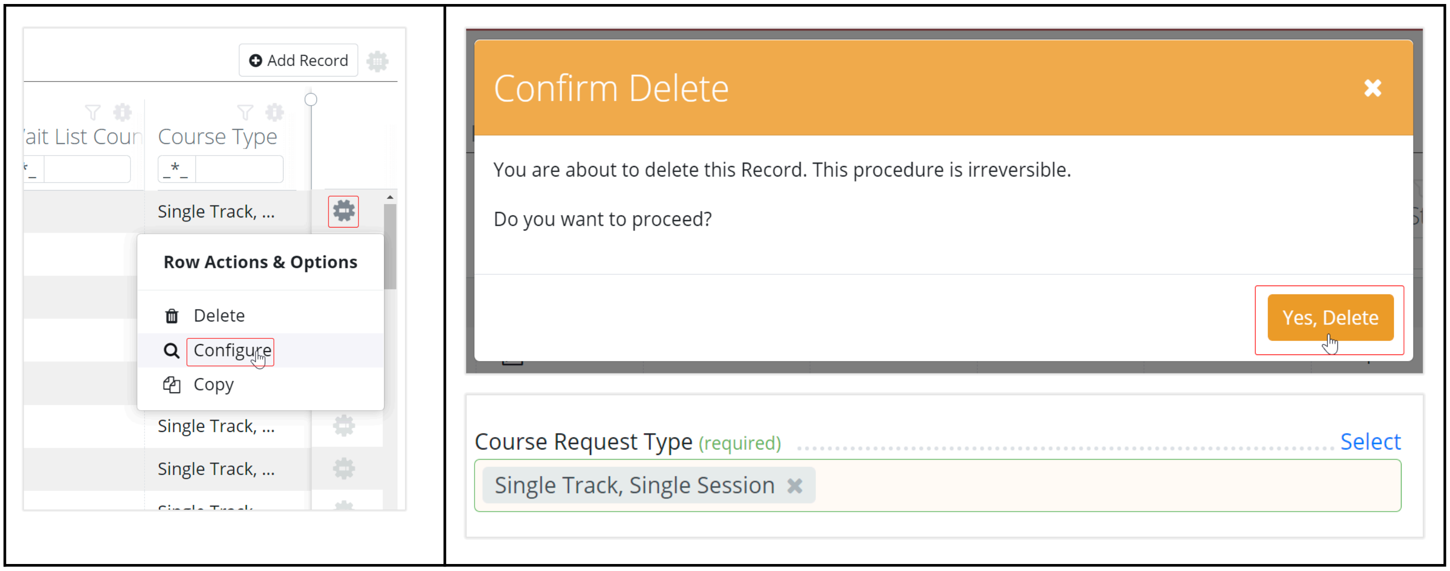


Editing or Deleting a Preexisting Course Request

To edit a course request, you can use the **Row Actions & Options Gear** located to the right of the data table.

- **Delete:** Selecting the delete option prompts you to confirm that you want to delete the specified course request.
- **Configure**
- **Copy:** You will need to pay close attention to the course request type, as it must be the same. For example, you cannot copy a multi-session course and expect to switch it to a single-session course. Once a course has been created, the system doesn't allow you to switch between course request types.





Submitting a Course Request for Review

Once all the required fields on a Course Request have been completed and saved, the request can be submitted to the PD Manager for review. This is done on the course requests table. Locate the course you would like to submit, and using the **Row Action Gear,** choose "**Submit for Review.**"

If this option is unavailable, it means that not all the required tabs and fields on the course request have been completed.

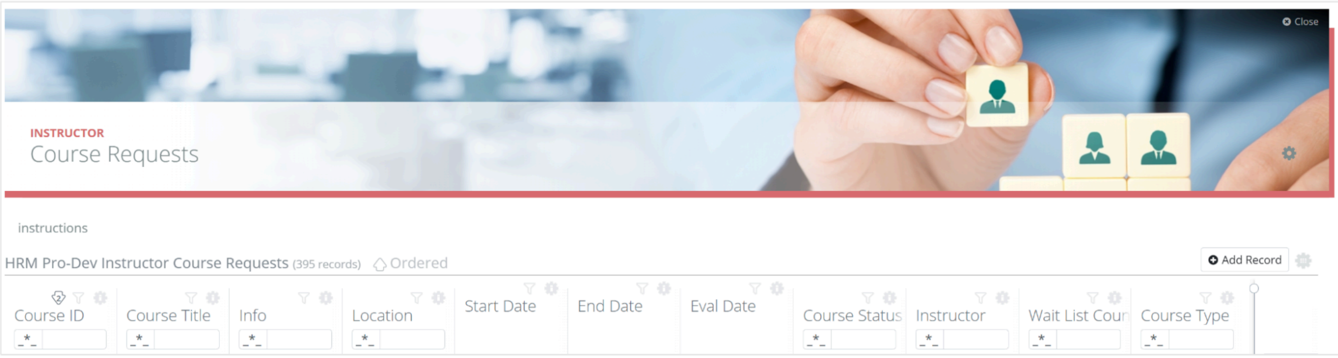
Approving or Denying a Course

Once a course requester has submitted a course for approval, the status is changed to Review, and those with the PD Manager Role can either approve or deny the request. This is done on the course requests table.

1. Locate the course you would like to review, and select '**Configure**' to review the various pages of course data.
2. You will have the ability to make any necessary edits. Click **Save**, then return to the **Course Requests table**.
3. Using the **Row Action Gear,** choose **Approve or Deny**. These row actions will only be present after the Course Request has been submitted for Review. Choosing 'Approve' will set the course status to 'Open', allowing participants to enroll. Selecting 'Deny' will set the course status to 'Denied'.

Explanation of Fields - Filtering

To quickly locate the course request you are looking for, you can filter the available course requests. These are located at the top of the data table.



By Course ID - Type in the ID number.

Course Title: Type in keywords. You may change the key filter. Right-click on the funnel icon and select the filter option. (Begins with, contains, does not contain, etc.)

Location: Type in keywords. You may change the key filter. Right-click on the funnel icon and select the filter option. (Begins with, contains, does not contain, etc.)

Start Date: Type a date or click the down arrow to open a calendar and select a date. You may change the key filter. Right-click on the funnel icon and select the filter option. (equals, doesn't equal, is less than, etc.)

End Date: Type a date or click the down arrow to open a calendar and select a date. You may change the key filter. Right-click on the funnel icon and select the filter option. (equals, doesn't equal, is less than, etc.)

Evaluation Date: Type a date or click the down arrow to open a calendar and select a date. You may change the key filter. Right-click on the funnel icon and select the filter option. (equals, doesn't equal, is less than, etc.)

Course Status: Select from the dropdown box to filter on the status of courses. The status items are defined as:

- **Pending:** A course request has been created but has not yet been submitted for review.
- **Review:** A course has been submitted for review. The PD Manager can approve or deny the request, which will, in turn, email the request creator to inform them of the decision. The PD Manager can make changes to any page and save them before and/or after approving a Course Request.
- **Denied:** The Course Request was denied.
- **Open:** Registration is now open for this course. The course can be viewed on the Course Registration page up until the Registration Closing date.
- **Grades In:** This indicates that the instructor and/or the PD Manager have verified attendance for this course and, if applicable, ensured that payments have been submitted for the course.
- **Complete:** The PD Manager double-checked the attendance verification and updated the course status to 'Complete'. This indicates all data for the course is accurate and the course credits are ready to be posted. After the Registrar has posted credits for this course, this creates a report that can be exported to other systems (e.g., adding credits to employee records for pay purposes)
- **Posted:** After credits have been exported and uploaded to other systems, the status is updated to Posted, and the data is removed from the export file.
- **Canceled:** The course was canceled.
- **Hold:** The course was placed on hold.

Instructor: Type an instructor's name (last name, first name) or the beginning of the last name to filter the list.

Request Typ:. Enter a 0,1,2, or 3 in the RT column to filter on Request Type, which is defined as:

- 0 = Single Session Course
- 1 = Multi-Session Course
- 2 = Conference Course (Multi-Track, Multi-Session)
- 3 = Off-Site Registration Course.

Info: This option allows you to download all the information the application has on your specified course request.

Wait List Count: This variable indicates the number of users currently on the waitlist for any given course.

Explanation of Fields: Add Record

Course Title: Enter a course title. Since users see this information prominently on the screen, it is good to be thoughtful about this description.

Alternate Course Title: Clients can choose to use this field to enter a shortened version of the title for loading completed credit information into other systems.

Course Requestor: The creator of the course request will be auto-populated in this field. To change the course requestor, select the name of the course requestor from the drop-down list.

Category Type: Select a category type or strand for this course. Each client establishes their own category types, and users can search for courses based on the selected category. Once you click **"Select,"** an additional modal will appear. To select a given category type, simply click on the **checkmark** located to the left of the appropriate category type.

Course Location: Select the course location from the drop-down list. To make the proper selection, simply click on the checkmarks next to the appropriate selection you would like to highlight.

Course Request Type: Select one of the Course Request Types. After you make a selection, the system will hesitate to refresh the screen and display the appropriate data. If you select Off-Site Registration, the screen will change. See the end of this document to view that screen and further instructions. To select the specific Course Request Type, click the checkmark next to the appropriate option.

School Year: Select the school year to which the activity belongs from the drop-down list. To select the appropriate school year, simply click the check mark next to the relevant year.

Course Sponsor: A default sponsor can be set up to auto-populate this field. Clients may choose to set up their site to allow up to three (3) sponsors for a single course. To select the Course Sponsor, after you have clicked on the blue hyperlink labeled "Select," simply check the appropriate item.

Course Description: Enter a description for the course - a summary explaining its specifics.

Course Agenda: Type an agenda in the text box for this course.

Course Start Date: Enter the Course Start Date. You may enter a date or use the calendar tool.

Course End Date: Enter the Course End Date. In the event of multiple sessions, this would be the date of the last session. You may enter a date or use the calendar tool.

Registration Closing Date: Enter the Registration Closing Date. You may enter a date or use the calendar tool. Users can register for a course through the Registration Closing Date.

Evaluation End Date: The date that the given evaluation will end.

Ignore End Date for Evaluation: If this box is checked, participants can complete a course evaluation any time after the course's start date. Select this option only when participants will complete the course at different rates (i.e., online courses).

Evaluation Form: Use this selector to choose from the available evaluation forms. This is the evaluation that participants will complete after participating in the course. To select the appropriate evaluation form, simply click the check mark next to the corresponding name.

Course Approval: A default can be set up to auto-populate the course approval code. Select a different option from the drop-down list to change the course approval code. To designate the approval code, simply select the correct box.

Course Facilitator: This field is optional. From the drop-down list, select the facilitator's name for this course. The facilitator will be able to use the system in the same way the instructor can for this particular course (i.e., attendance verification, view reports). Selecting a course facilitator is as simple as clicking on the check mark next to the name.

Authorizing Admin: From the drop-down list, select the name of the authorizing administrator. To select an individual, simply click the checkmark next to their name.

Lead Instructor: From the drop-down list, select the lead instructor for this course. You may identify up to two additional instructors for each session on the 7-Sessions tab. It's important to note that the lead instructor should also be listed as the first instructor on each session of the 7-Sessions tab.

Course Objective 1 - 5: Enter three (3) objectives for this course. WA state clients are required to enter at least three objectives. Optionally, clients can have objectives 4 and 5 made visible and then choose to make them required or not.

Participants Can Apply to use PD Funds: used with the 'Use PD Funds' default. Participants will see the $ icon in Course Registration and Course Enrollment next to the course if the field is set to true. Participants will be able to apply for the use of PD funds for this course.

Course Allows for ParaStandards: Set to true if the course meets the state qualifications for a PARA course. An additional form will open. The requester will complete the form, indicating which para standards the course covers and/or which certificate it is associated with (Fundamental, General, ELL, Special Education, or Advanced).

Course Is STEM: If the course meets the state qualifications for a STEM course, set this to true.

1. An additional form will open. The requester will complete the form, indicating which of the two of the four STEM components the course meets and answer the three questions. Be sure to save their work after they answer.

2. Courses with the STEM box checked will be marked as STEM on the participant's official transcript report and the clock hour report after the course is verified, and credits are awarded and posted.

Course Meets Qualification for a TPEP Course: WA state no longer requires staff to submit TPEP hours for certification renewal. Clients can choose whether to use this field or not. If the course meets the state qualifications for a TPEP course, set the field to true and select the standard from the drop-down menu.

1. The TPEP course must meet one of the eight criteria defined by the state.
2. Courses with the TPEP field set to true will be marked as TPEP on the participant's official transcript report and the clock hour report after the course is verified, credits are awarded, and posted.

Course is a Repeat of a Previously Approved Course: If this course is a previous or future course, set this field to true. An example might be where multiple sessions of the same First Aid course are offered, each on a different date. A text box will appear when checked, and you can enter if any changes were made based on feedback from prior course evaluations.