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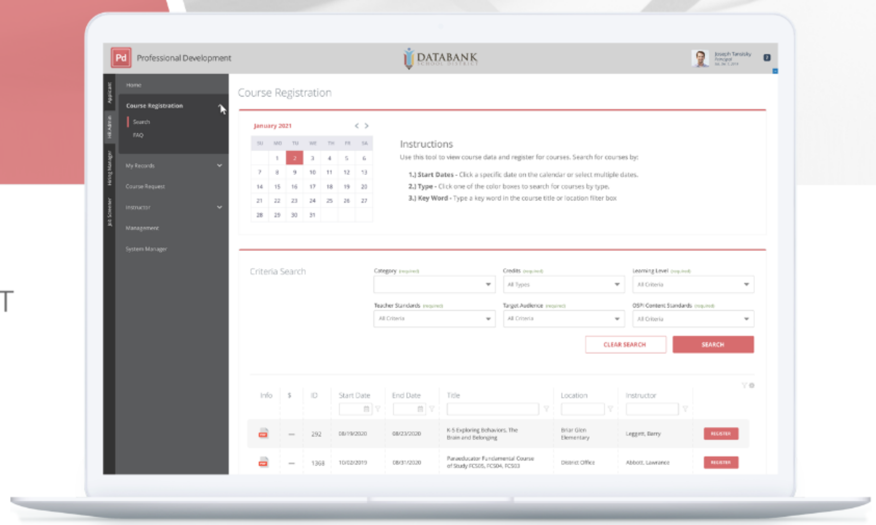
INTEGRATED · CUSTOM · APPLICATIONS



PROFESSIONAL DEVELOPMENT

Creating Course Requests

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Introduction

In this manual, we will look at the process for creating, submitting, and approving a course request via the roles of PD Manager.

How to Use This Manual

The purpose of this Manual is to walk you through the course creation process from start to finish in the Professional Development application, which is called "ProDev" for a short reference.

This manual is laid out in terms of functionality that is closely related.

Process

There are three users types that can enter course requests:

- Instructors
- Facilitators
- PD Manager

You may request changes to these authorization settings at any time.

Contact support for assistance by emailing support@schooldata.net.

This manual will focus on the whole process of creating a Course Request, which includes several steps:

1. One of the users above adds a course request, completing the initial details as the course requestor (Status: Pending)
2. The course requestor then configures that course request, completing the additional required tabs (Status: Pending)
3. Once the request is complete, the course requestor submits the request for review by a PD Manager (Status: Review)
4. IF NEEDED, the PD Manager reviews and may edit the course request and then approves or denies the request (Status: Open or Denied)
5. If the course is approved and status is Open, it will now be open and available for participants to register.

As you walk through this process, note that system defaults can hide some fields from view on a page. **Note that the example shown may look different than your site**. Clients can request a review of the system defaults at any time by emailing support@schooldata.net.

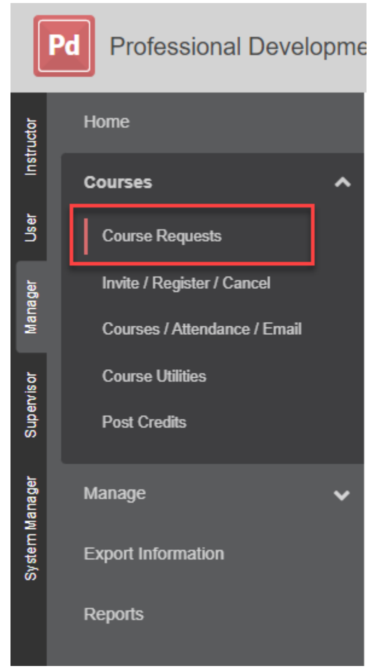
Course Request Menu

From the application navigation menu, or left-hand navigation menu, we can see Course Request option under the Course menu.

Instructors will only see course requests for which they are listed as the course requestor. Users with the role of PD Manager will see all course requests on the site.

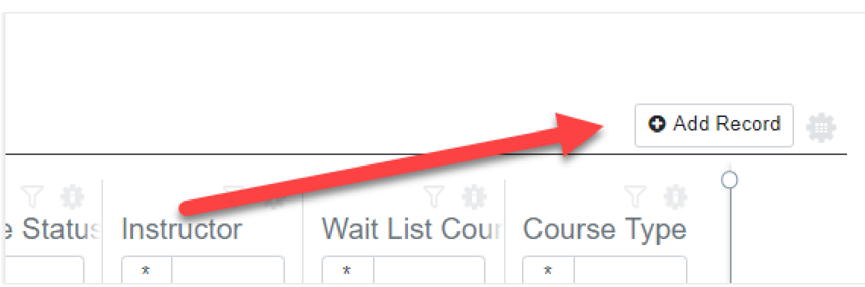
Completing a new Course Request consists of seven (7) separate screens, except for districts that collect and process fees for courses, which will require an additional form to be completed.

You must initially add a course request and then configure the course to update all additional information.

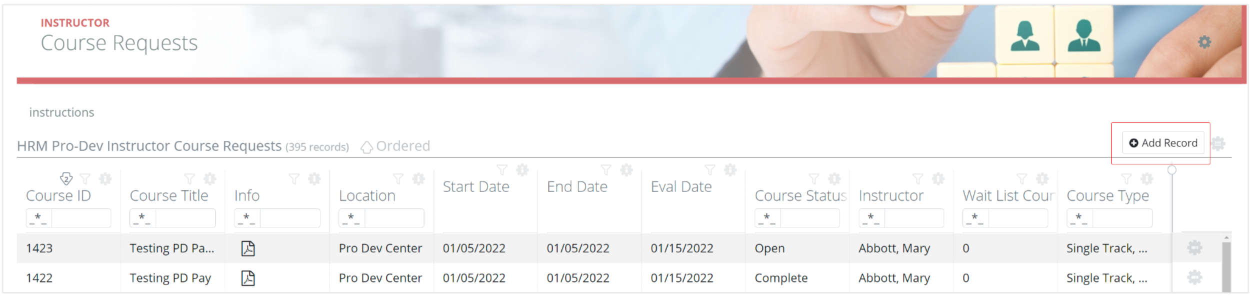


Adding a Course Request

To add a new course request, you will need to select the "Add Record" button located at the top right of the data table displayed in the "Course Requests" section. Once selected, this option will bring up a modal that will have various fields that need to be filled out to add the new course request.



If you would like to filter through the results of the course requests, you can do so to have a detailed breakdown of this and what each section means. Visit the [Explanation of Fields - Filtering]() section.



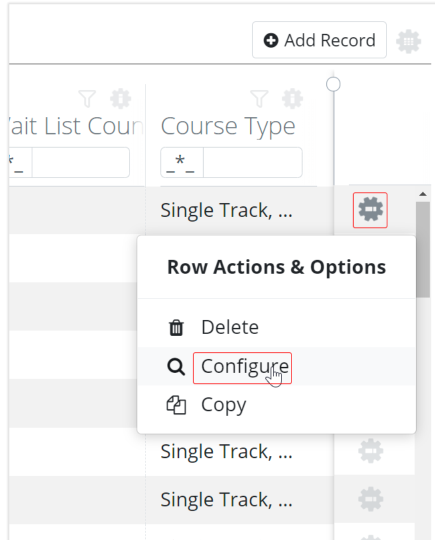
We can see in the example that there are fields that have a "Select" blue hyperlink.

Selecting this option will bring up a pre-configured set of additional options that you can choose from. Once you have located the course request type, click on the checkmark that is located to the left of that option, and it will be automatically added. The same method can be used with all available options with a blue hyperlink. All fields that are marked as required will need to be filled out before continuing. To see a breakdown of all fields available on this initial form and what they mean, refer to the [Explanation of Fields - Add Record]() section in this document.

Once you have filled out all of the required fields on this initial Info page and hit save, your course will be added to the list of existing Course Requests with a status of Pending.

Configuring a Course Request

After completing the first page to add a course request, the next step is to configure that course and complete the remaining pages.   You will locate the course you would like to configure, then select the row actions in the options for that course.



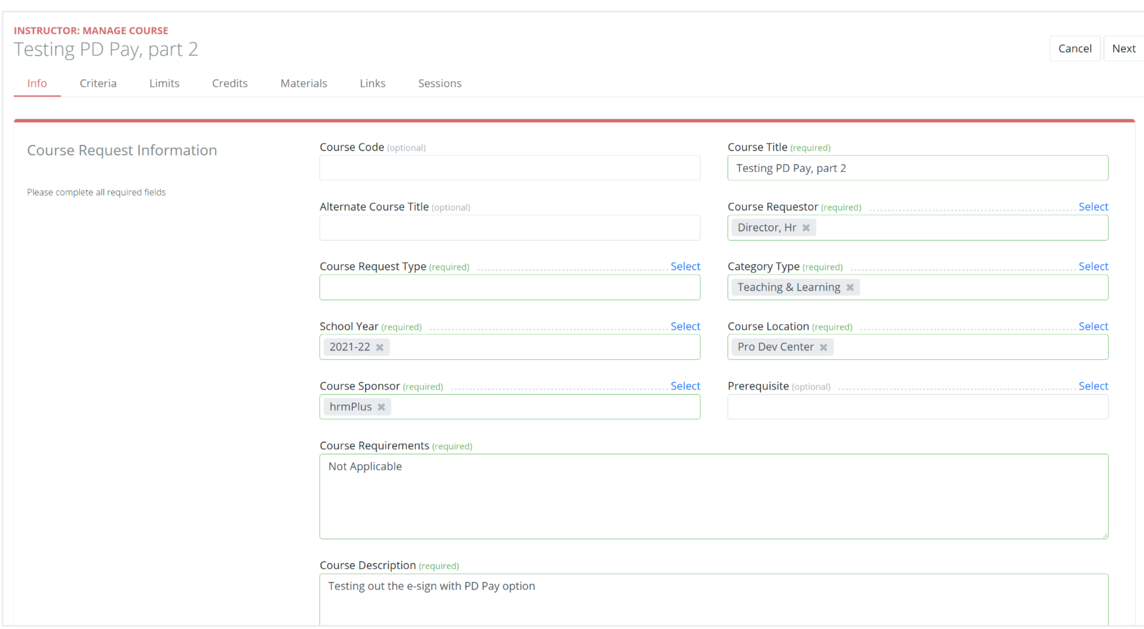
Next, you will select the configure button located inside the Row Actions & Options.

Once you do this, you will be brought to a new page. This page will have seven different pages, referred to as "subpages". They will be:

- Info
- Criteria
- Limits
- Credits
- Materials
- Links
- Sessions

Info Subpage

In the picture below, we can see the default page, which is the information page that was already completed..



Inside the info page, you will find all of the general information about any given course. This will contain specifics 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 info page, continue on the next tab to criteria.

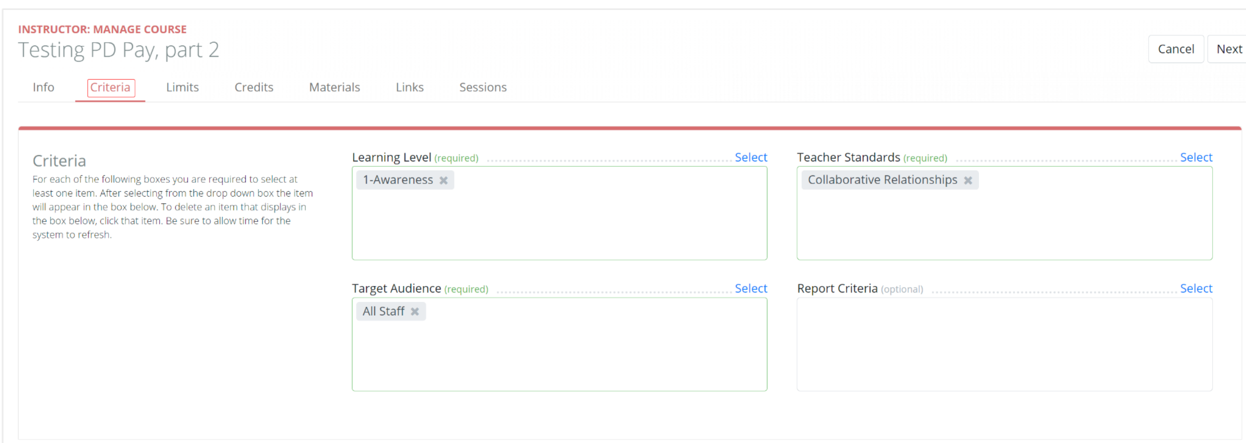
Criteria Subpage

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. ***You must select at least one item for each criteria box except for the Report Criteria.***

An example of the Course Criteria page is shown below.

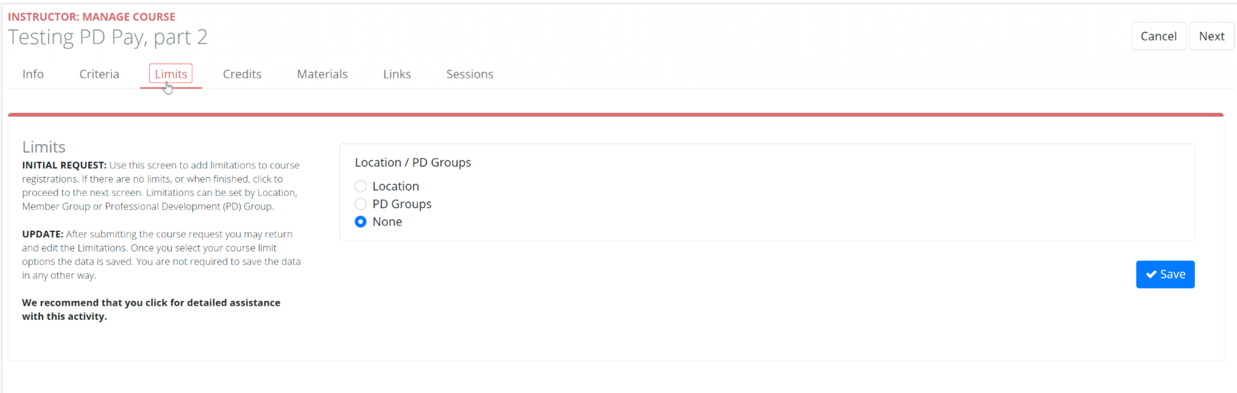


These options can be edited at will, and additional parameters can be added by using the blue hyperlink located at the top right of each text field. It has previously been shown that this will bring up a modal that will allow you to add additional information.

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

Limits Subpage

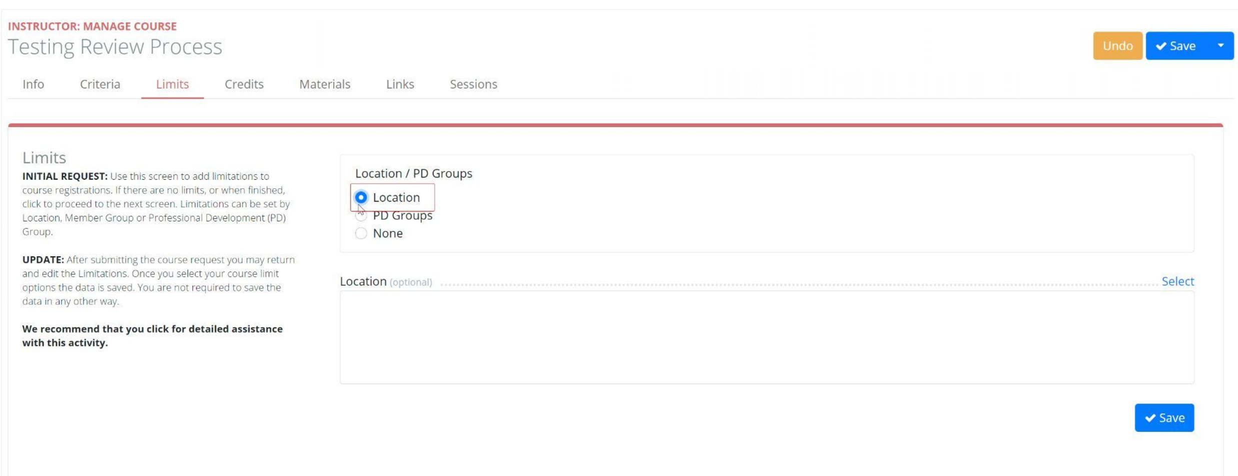
This page sets limits on which participants can register for the course. If there are no limits on the course, click Save and go to page 4-Credits as No Limits is the selected default. However, you can choose to set limits to the course by either Location, PD Group or Member Group (for Coop Clients).



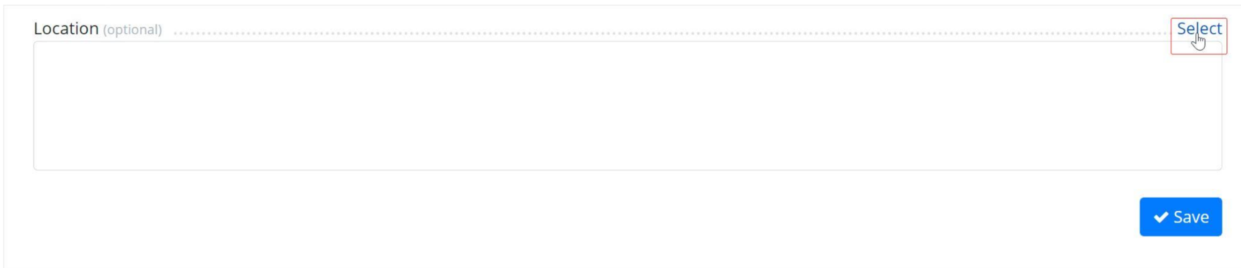
Limit by Location

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.

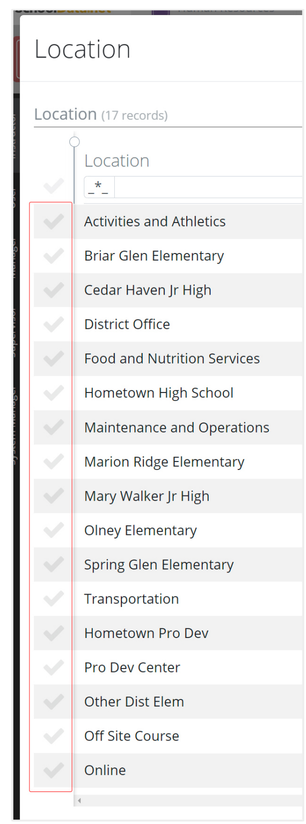
To begin this process, click on "Location", a selection that can be seen in the picture below.



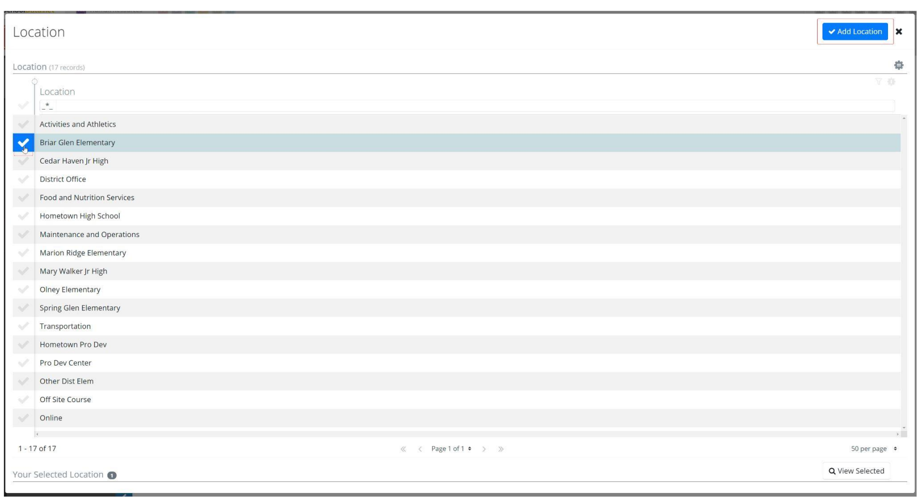
Next, you will need to specify the location. This can be done in the box that is located underneath the selection you just made. Its label will be "Location". Selecting the blue hyperlink that is labeled "Select" will bring up an additional modal where you can select from a pre-populated list of locations.



In the image to the right, we can see that the modal has appeared and that we can make our location selection by clicking on the checkmark that is next to the location that we would like to specify.



Once you have made your selection, click on the "Add Location" blue button located at the top right of the modal to return to the "Limits" page. The blue button mentioned is highlighted in the picture below.



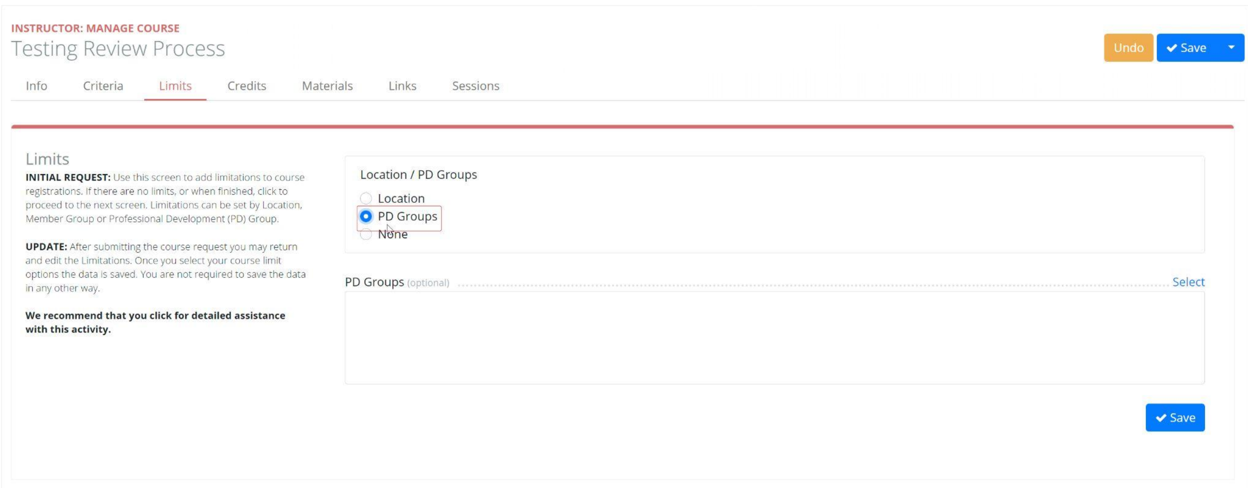
Limit by PD Group

PD Groups are associated with the positions.

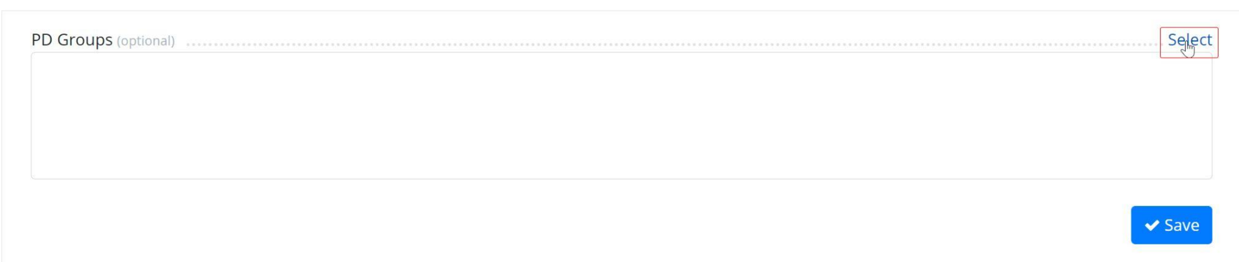
If you select PD Group, the screen will open to provide you with fields for selecting the PD Group as shown below: Select as many PD Groups as needed. If you inadvertently select a PD Group, click the name of the PD Group in the display box to remove it.

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.

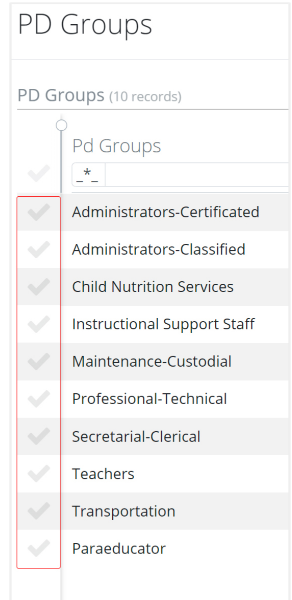
To begin this process, click on "PD Groups", a selection that can be seen in the picture below.



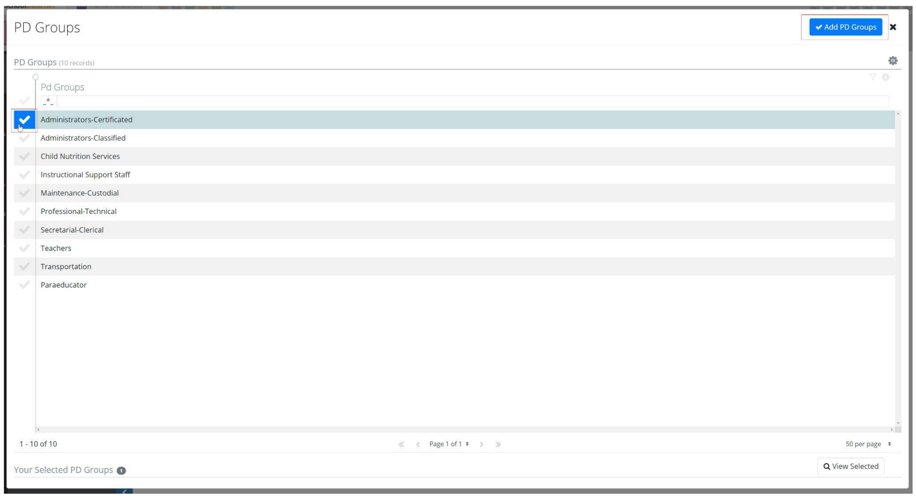
Next, you will need to specify the PD Groups. This can be done in the box that is located underneath the selection you just made. Its label will be "PD Groups". Selecting the blue hyperlink that is labeled "Select" will bring up an additional modal where you can select from a pre-populated list of PD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



In the image to the right, we can see that the modal has appeared and that we can make our location selection by clicking on the check mark that is next to the PD Groups that we would like to specify.



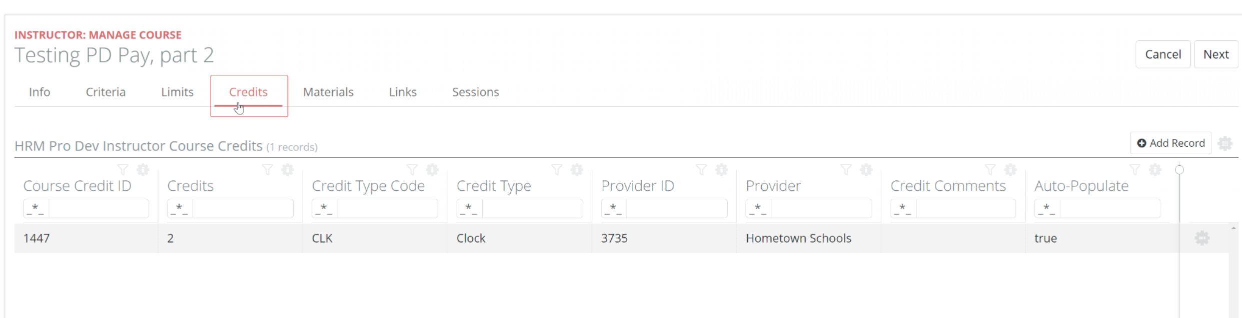
Once you have made your selection, click on the "Add PD Groups" blue button located at the top right of the modal to return to the "Limits" page. The blue button mentioned is highlighted in the picture below.



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

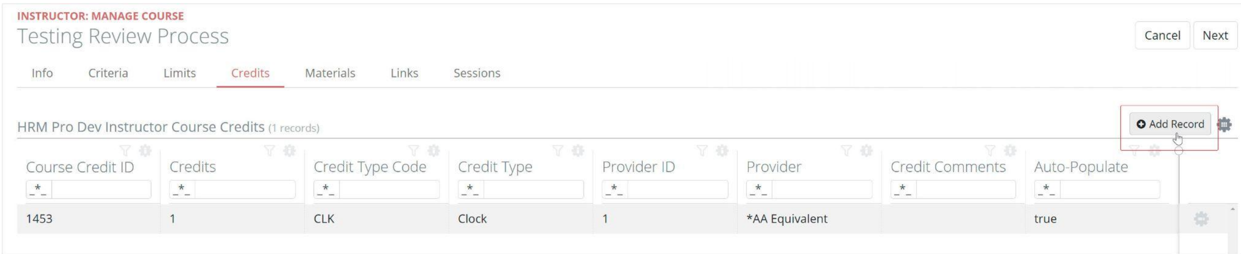
Credits Subpage

The credit subpage will identify the type of credit available for any given course.

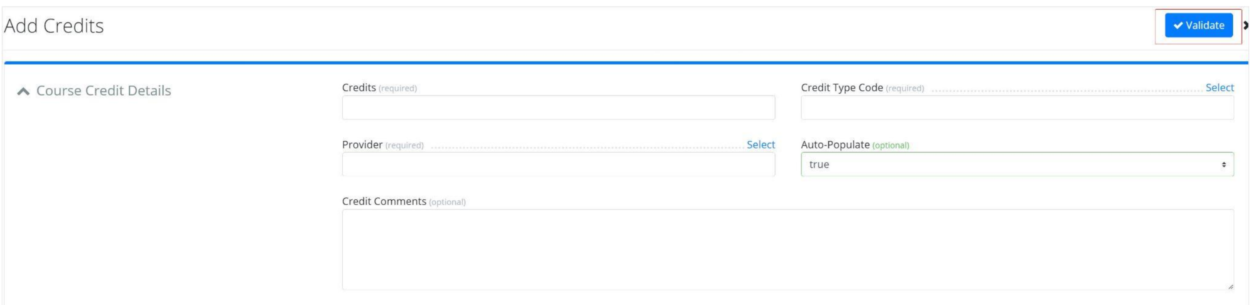


You can have multiple credit types. When users register for a course, they can select from available credit types. The specific credit types offered are set up during the installation, but additional credit types can be added at any time.

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



Next, fill out the resulting form and click the blue button at the top right that says "Validate":



Enter the credit data as shown in the example above and use 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 visible on the course detail report.
Auto-Populate	If Checked, that credit type will auto-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.**

Click the **Save** button and add as many credit types as needed for the course. You may delete a record by using the row action gear next to any record and choosing delete.

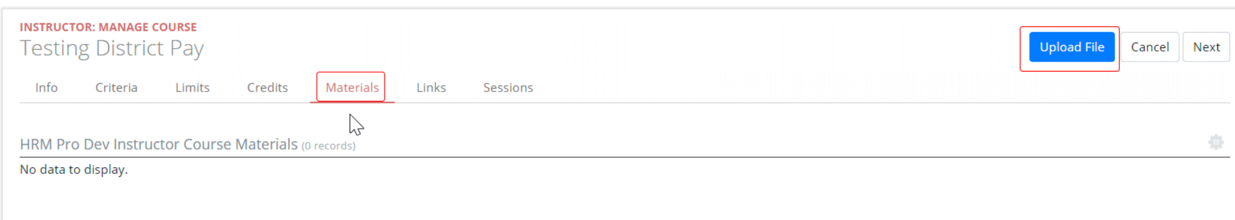
After completing the credits, continue to the next tab for Course Materials.

Materials Subpage

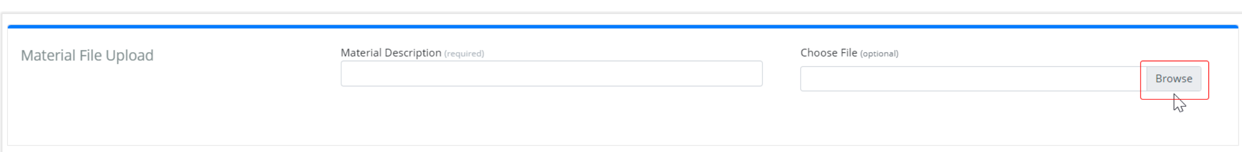
Optionally, materials may be uploaded and attached to the course. In Course Registration, users can click on a PDF icon to open the Course Detail Report. This report will include links to any uploaded materials. These links are permanently linked to the course, and users can access this information whenever needed. The Course Detail Report is also available in My Records, My Courses, where a user sees 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 and open the file you wish to upload. Note: You may upload files with extensions of .doc, .docs, .pdf, .pdf, .gif, 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**.
6. The item you have uploaded will then appear in the table.

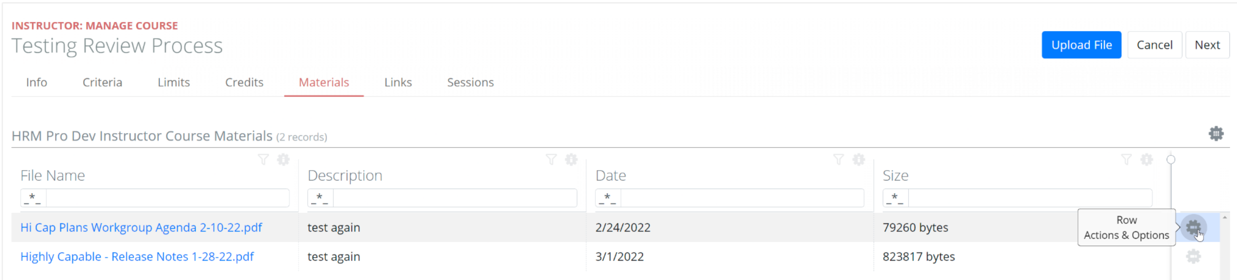


Once you have selected the "Materials" subpage, you can upload any applicable materials that you may have using the "Upload File" button that is located at the top right of the page, we can see this button highlighted in the picture above. Once this is done a modal will appear asking for you to input a description of the file you are uploading and asking to also select the file from your computer. To start the upload simply click on the "Browse" button, then select the file you want to upload on your computer as seen in the picture below.



Editing Materials

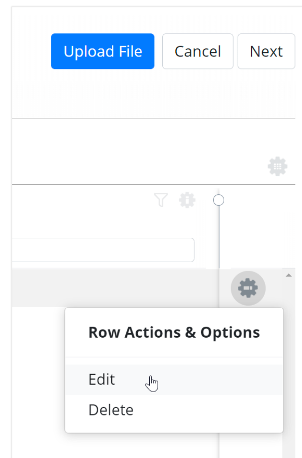
In order to edit the uploaded material, you will navigate to the "Materials" subpage, from the "Manage Course" section. once there you will use the "Row Actions and Options" menu that is located to the far right of the page, and is symbolized by the grey gear icon. We can see its location in the picture below.

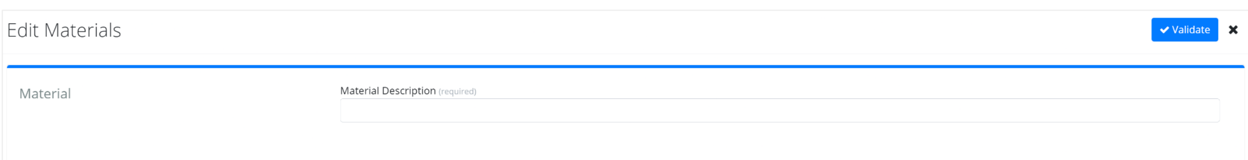


We can see in the picture to the right that once you select the gear icon at the far right the "Row Actions and Options" menu will appear. From here you can choose to edit or delete any course materials that have been uploaded.

To delete a course material simply click on the "Delete" option that you see in the picture to the right.

To edit the material choose the "Edit" option. Once you have done this you will see a modal will appear where you will be able to modify the description. When you're done modifying it click on the "Validate" blue button that is located at the top right of the modal and you will be returned to the Materials sub page.



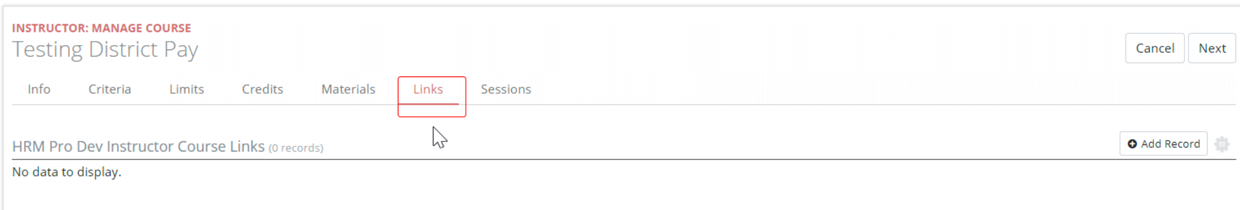


After completing the course materials, continue to the next tab for Course Links.

Links Subpage

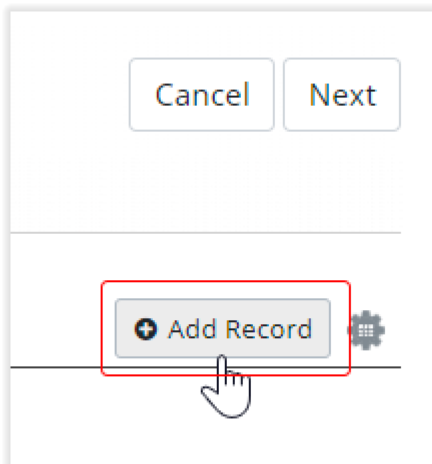
Optionally, links to any URL, Google Docs, or YouTube videos can be attached to the course. In Course Registration, users can click on a PDF icon to open the Course Detail Report. This report will include the attached course links. These links are permanently linked to the course, and users can access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

To attach a link, click the **+Add Record** button. This will open a screen as shown below:



To add a link:

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



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

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 sessions options are as follows:

0 = Single Session Course

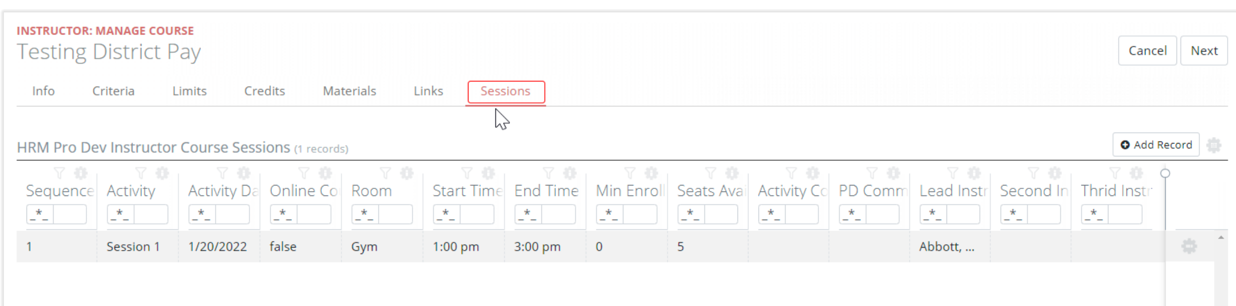
1 = Multi-Session Course

2 = Conference Course (Multi-Track, Multi-Session)

3 = Off-Site Registration Course.

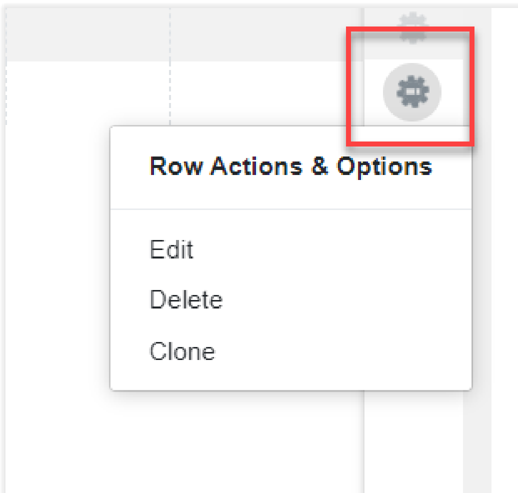
To add a new session:

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



Notes for completing session information:

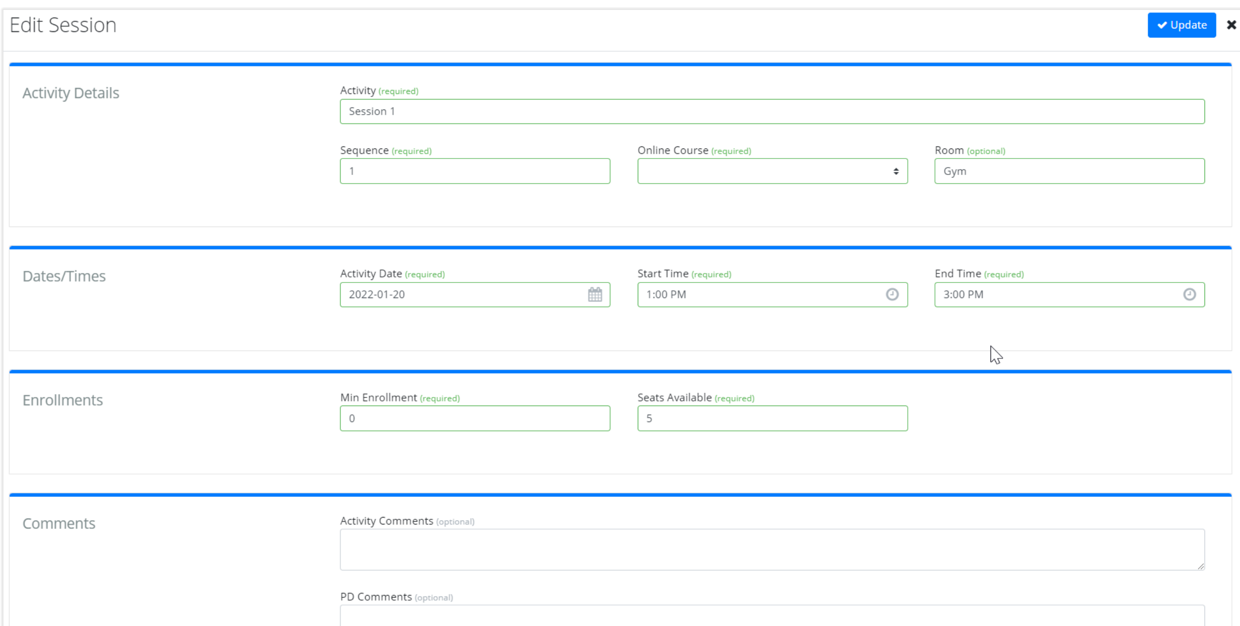
Activity	Enter a name for the session.
Sequence	The sequence of sessions must run concurrently and cannot be duplicated.
Online Course	Choose True/False.
Room	Enter the room number or name of the room the activity will occur in.
Activity Date	Start date for the course will auto-populate, but this can 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 lead instructor selected on page one 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.



Use the row action gear for any added session to edit or delete that session. If it is a multi-session course, you will also see the Clone option which will allow you to copy any session.

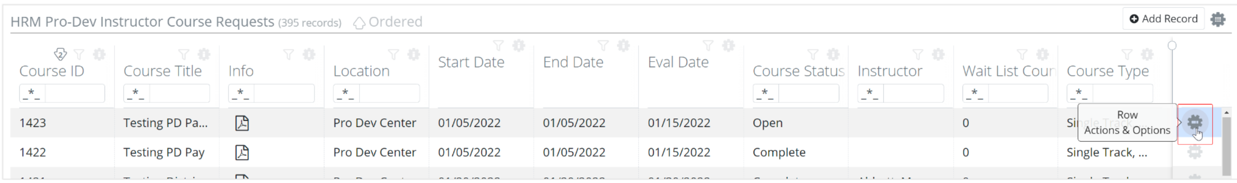
To do this simply utilize the "Row Actions and Options" menu that is located all to the right of the data table. A close-up view is shown in the picture to the left of the gear that is selected in order to access this menu.

Once you have selected the edit button you will be brought to the modal that is shown in the picture below where you can update a variety of details in regards to the session.



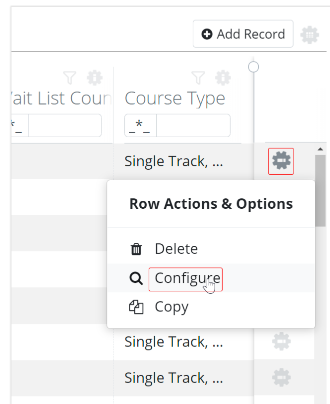
Editing or Deleting a Preexisting Course Request

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

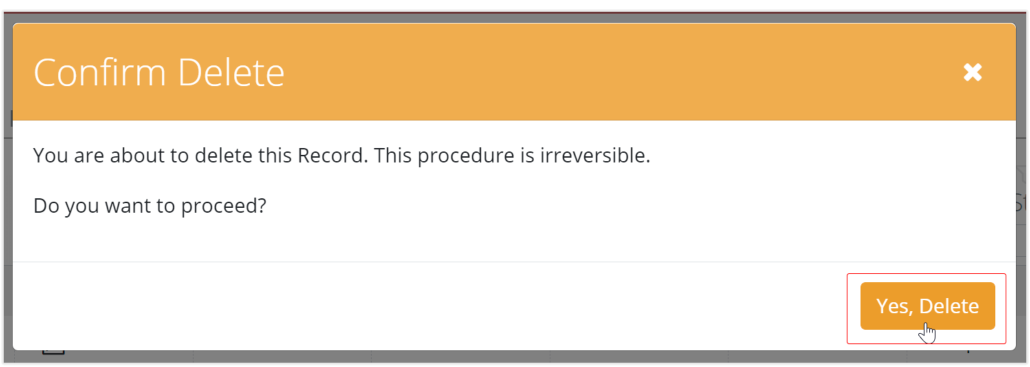


Select which option will bring up a small drop-down menu that will have three different options:

- Delete
- Configure
- Copy



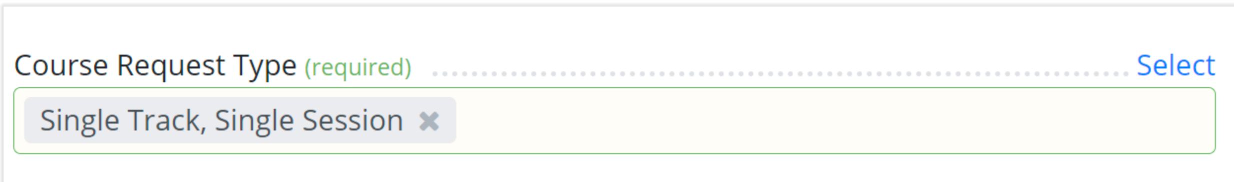
Selecting the delete option in the actions and options row will allow you to delete any given course request that exists. If you choose this option, you will be asked to confirm that you want to delete the given course request.



Copying a Course Request

In addition to creating a new course request, you also have the ability to copy an existing course, and a new record that is a duplicate will be added to the course request menu. This can be done via the row action gear on the Course Request menu by choosing "copy".

You will need to pay close attention to the course request type as it has to 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 let you switch 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, not all of the required tabs and fields on the course request have been completed.

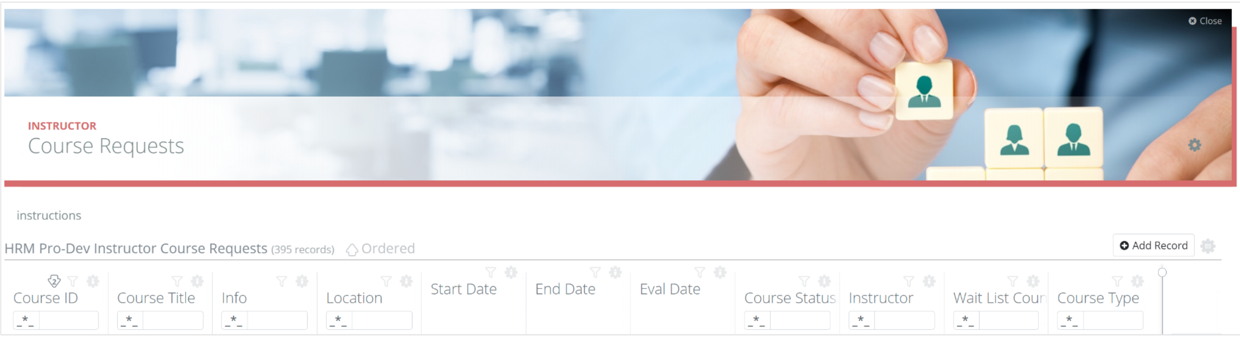
Approving or Denying a Course

Once a course requestor 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. Locate the course you would like to review, and choose Configure to review the various pages of course data. You will have the ability to make any necessary edits. Click Save and then return to the Course Requests table, and 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.

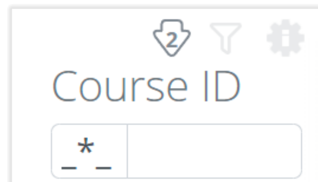
Choosing Approve will set the course status to Open and allow participants to enroll. Selecting Deny will set the course status to Denied.

Explanation of Fields - Filtering

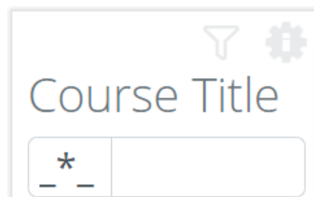
To quickly locate the course request you are looking for, you can filter the available course requests. These are located at the top of the data table, as seen in the following picture.



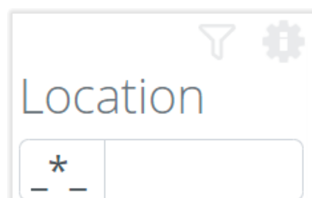
By **Course ID** - Type in the ID number.



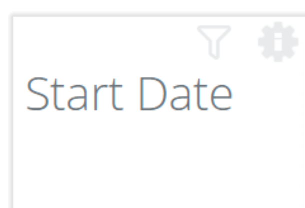
Course Title - Type in keywords. You may change the key filter. Right-click on the funnel icon and select the filter option. (Begins with, contains, does not contain, etc.)



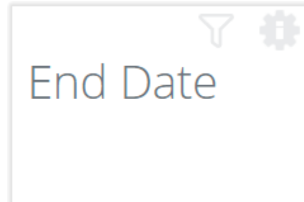
Location - Type in keywords. You may change the key filter. Right-click on the funnel icon and select the filter option. (Begins with, contains, does not contain, etc.)



Start Date - Type a date or click the down arrow to open a calendar to select dates from. 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.)

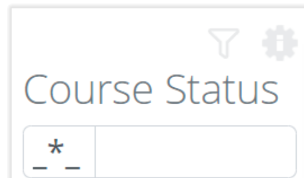


End Date - Type a date or click the down arrow to open a calendar to select dates from. You may change the key filter. Right-click on the funnel icon and select the filter option. (equals, doesn't equal, is less than, etc.)



Eval Date - Type a date or click the down arrow to open a calendar to select dates from. 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 drop-down box to filter on the status of courses. The status items are defined as:



a. Pending. A course request has been created but has not yet been submitted for review.

b. Review. A course has been submitted for review. The PD Manager can approve or deny the request, which will in turn email the creator of the request if the request has been approved or denied. The PD Manager can make changes on any page and save the changes before and/or after approving a Course Request.

c. Denied. The Course Request was denied.

d. Open. This course is open for registration. The course can be viewed on the Course Registration page up until the Registration Closing date.

e. Grades In. This indicates the instructor, and/or the PD Manager, has verified attendance for this course, and if applicable, made sure payments have been submitted for the course.

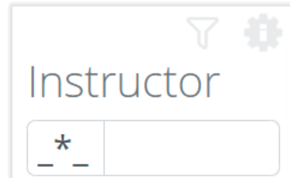
f. Complete. PD Manager double-checked the attendance verification and changed the status of the course to Complete. This indicates all data for the course is accurate and the course credits are ready to be posted. After the Registrar has posted credits for this course, this creates a report that can be exported to other systems (e.g., adding credits to employee records for pay purposes)

g. 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.

h. Canceled. The course was canceled.

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

j. 0 = Single Session Course

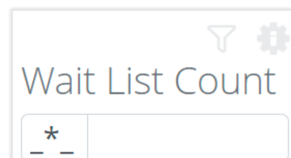
k. 1 = Multi-Session Course

l. 2 = Conference Course (Multi-Track, Multi-Session)

m. 3 = Off-Site Registration Course.

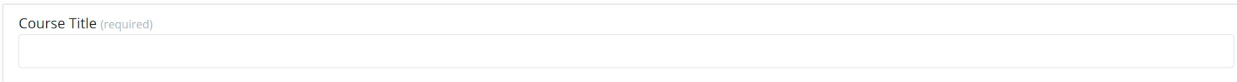
Info - This option will let you download all the information that the application has on your given course request.

Wait List Count - This variable will indicate how many users are currently on the waitlist for any given course.

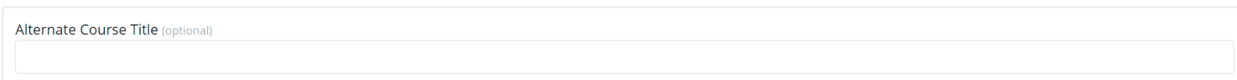


Explanation of Fields - Add Record

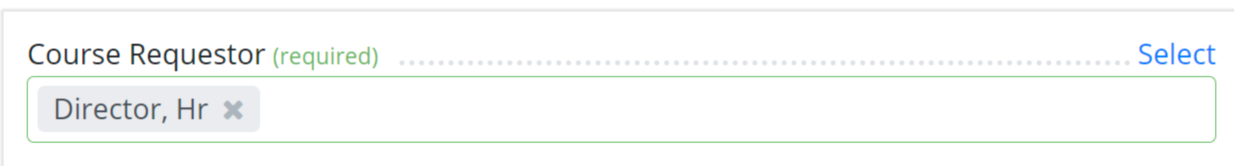
Course Title - Enter a course title. Since users see this information prominently on the screen, it is good to be thoughtful about this description.

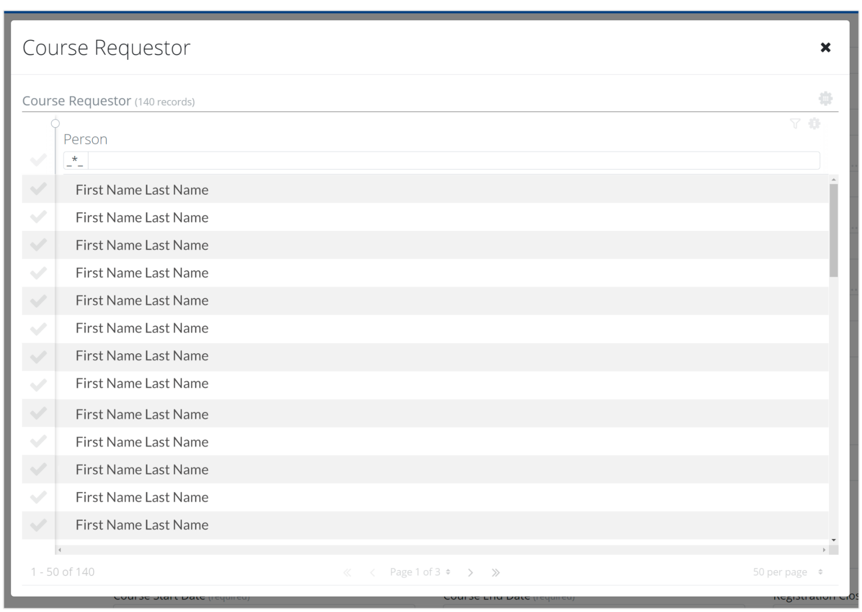


Alternate Course Title - Clients can choose to use this field to enter a shortened version of the title for loading completed credit information into other systems.

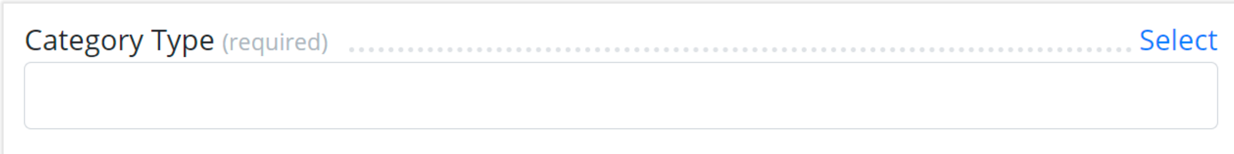


Course Requestor - The creator of the course request will be auto-populated in this field. To change the course requestor, select the name of the course requestor from the drop-down list.



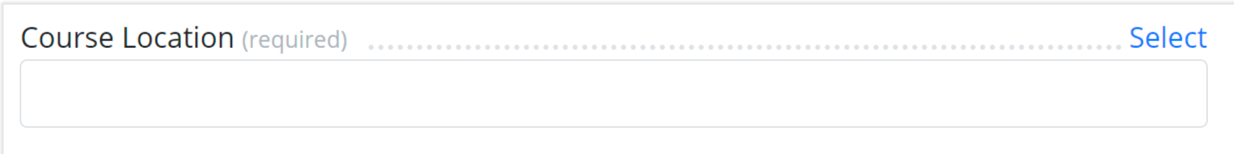


Category Type - Select a category type or strand for this course. Each client establishes their category types, and users can search for courses based on the category selected.

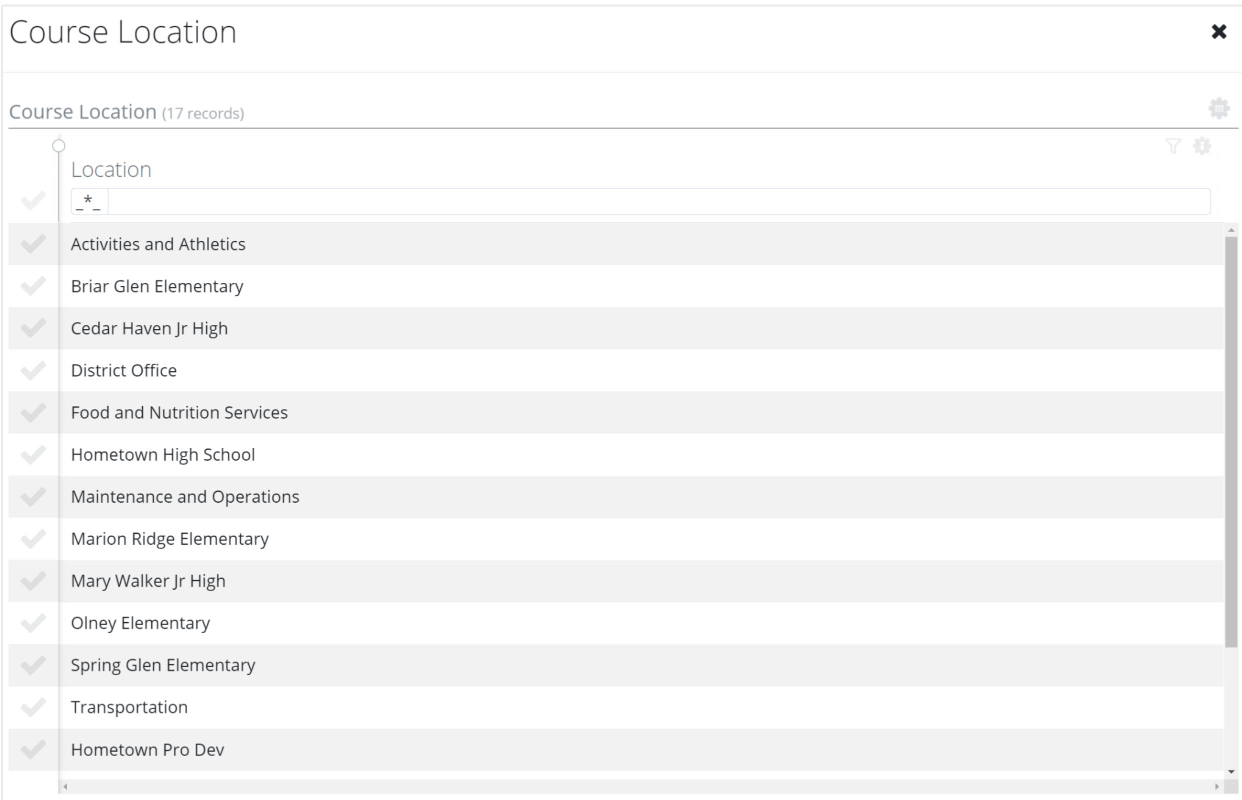


Once you have clicked on the blue hyperlink with the label "Select" you will see an additional modal will appear. In the picture below we can see the Category Type modal that appears. In order to select a given category type simply click on the checkmark that is located to the left of the appropriate category type.

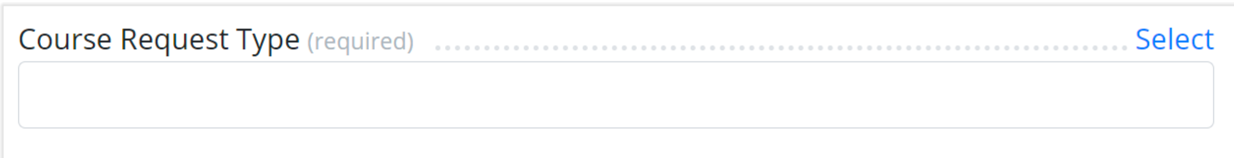
Course Location - Begin by selecting the location of the course from the drop-down list.



In the picture below, we can see a wide range of options. To make the proper selection, simply click on the checkmarks next to the appropriate selection you would like to highlight.

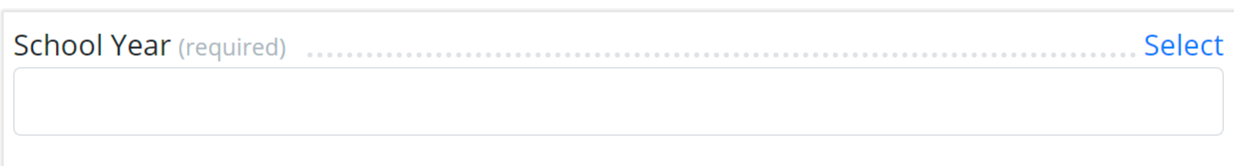


Course Request Type - Select one of the Course Request Types. After you make a selection, the system will hesitate to refresh the screen and display the appropriate data. If you select Off-Site Registration, the screen will change. See the end of this document to view that screen and further instructions.



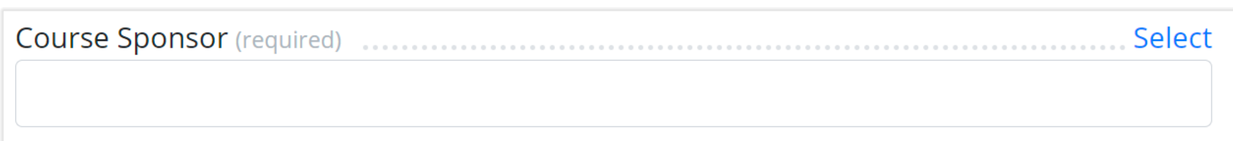
To select the specific Course Request Type, click on the checkmark of the appropriate options.

School Year - Select the school year the activity belongs to from the drop-down list.



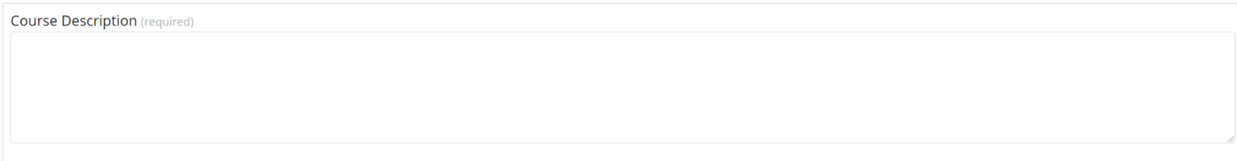
In order to make your selection for the appropriate school year, simply click on the check mark that is next to the appropriate year.

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.

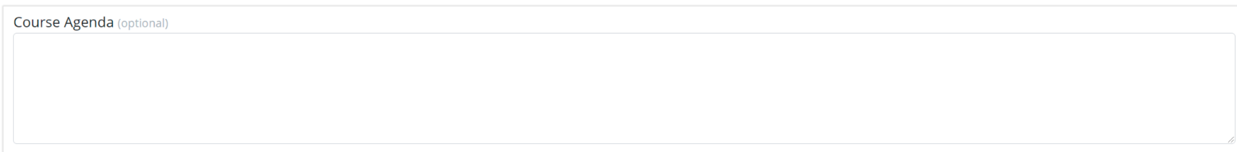


To select the Course Sponsor, after you have clicked on the blue hyperlink labeled "Select," simply check the appropriate item, as seen in the image below.

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

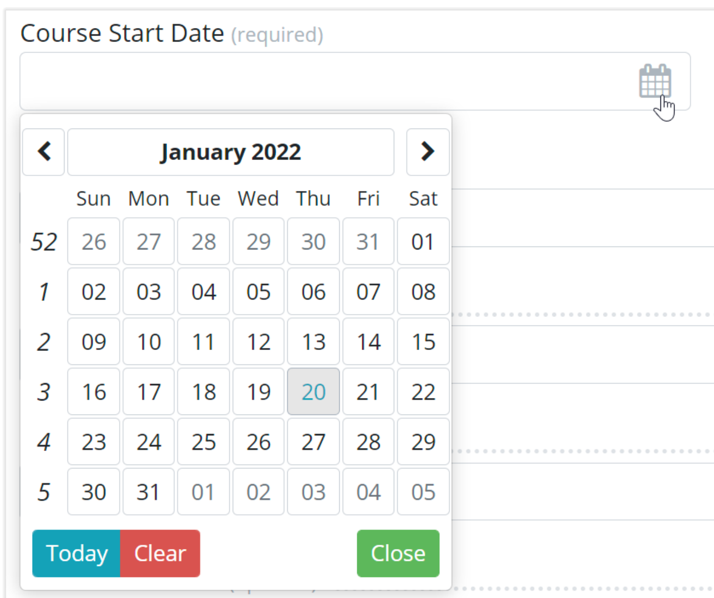


Course Agenda - Type an agenda in the text box for this course.



Course Start Date - Enter the Course Start Date.

You may enter a date or use the calendar tool.

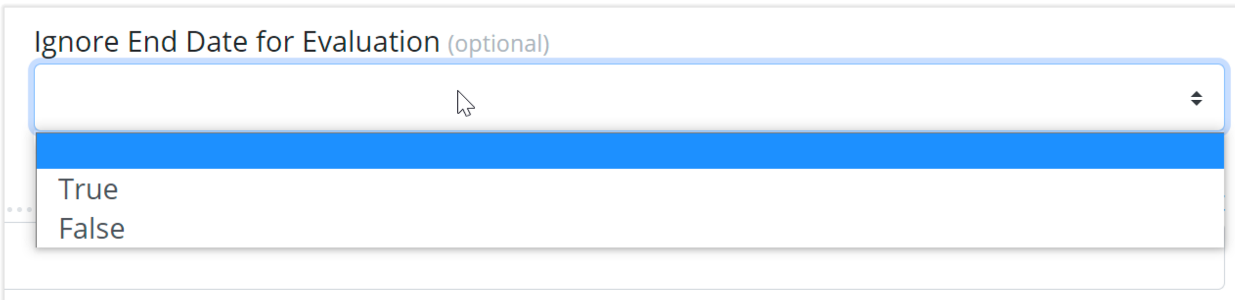


Course End Date - Enter the Course End Date. In the event of multiple sessions, this would be the date of the last session. You may enter a date or use the calendar tool.

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.

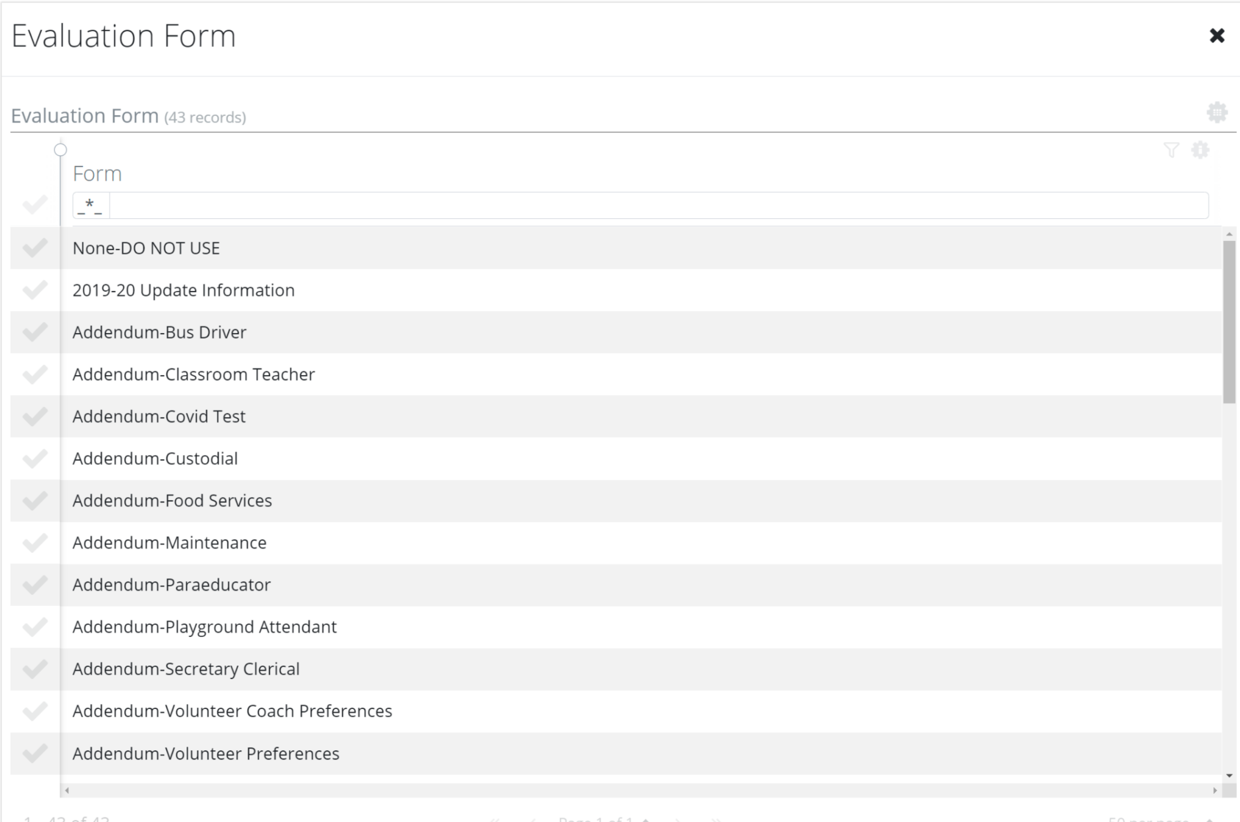
Evaluation End Date - The date that the given evaluation will end.

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).

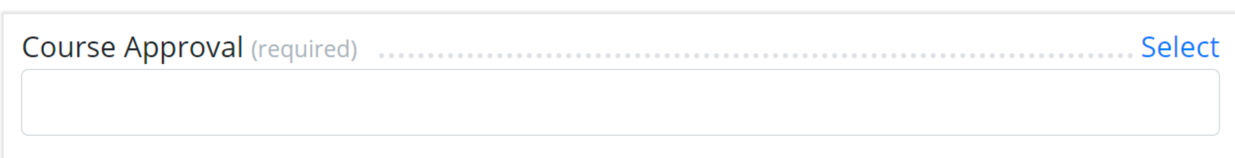


Evaluation Form - Use this selector to choose from the available evaluation forms. This is the evaluation that participants will complete after participating in the course.

In order to choose the appropriate evaluation form simply click on the check mark next to the appropriate name.

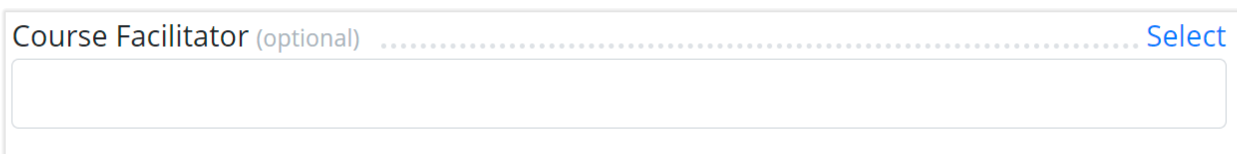


Course Approval - A default can be set up to auto-populate the course approval code. Select a different option from the drop-down list to change the course approval code.



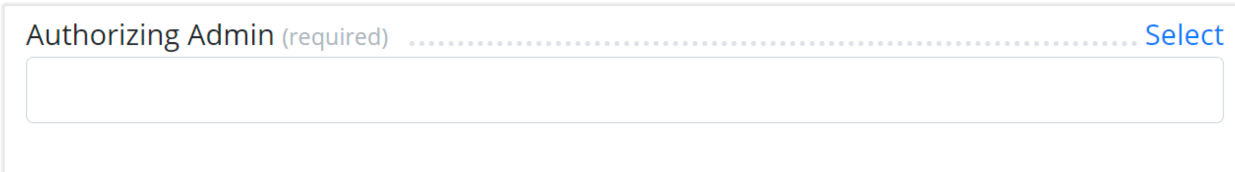
To designate the approval code simply check the box that is correct.

Course Facilitator - This field is optional. From the drop-down list, select the name of the facilitator 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).



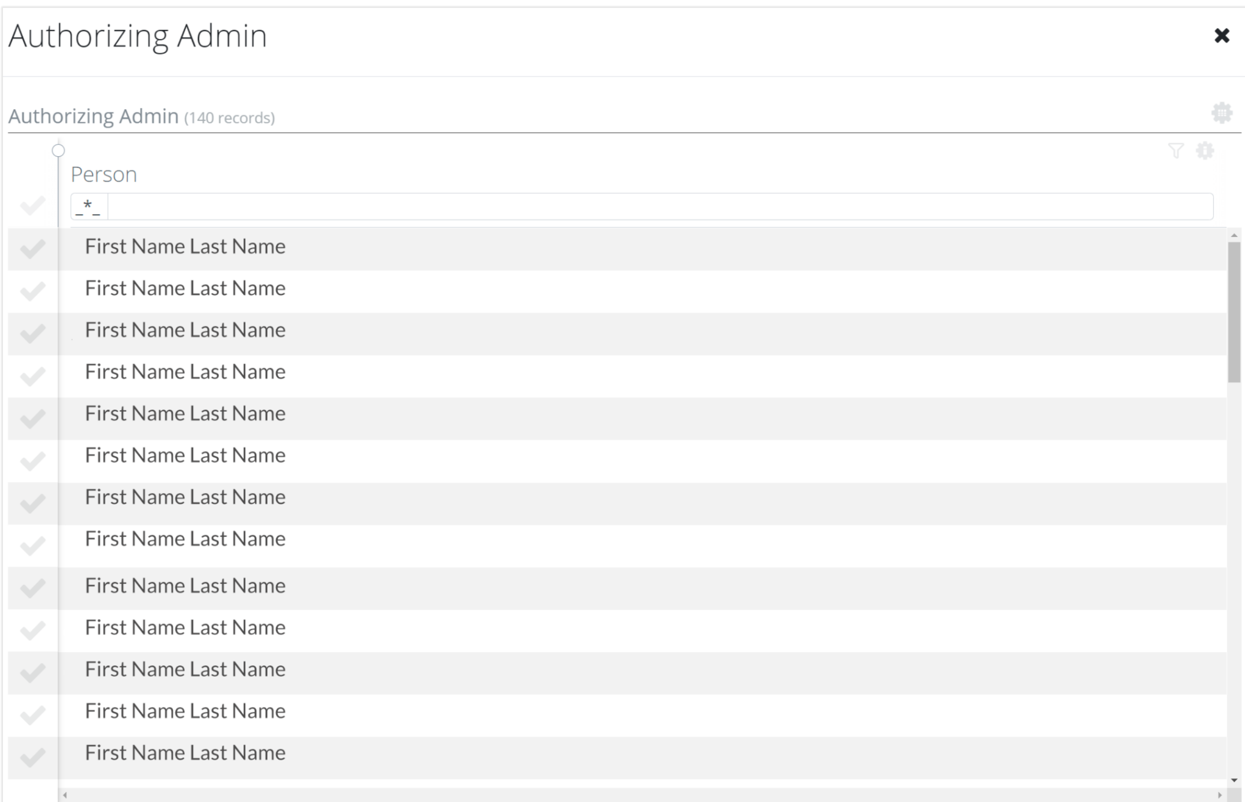
Selecting a course facilitator is as simple as clicking on the checkmark next to the name. Fake names have replaced names in the picture below.

Authorizing Admin - From the drop-down list, select the name of the authorizing administrator.

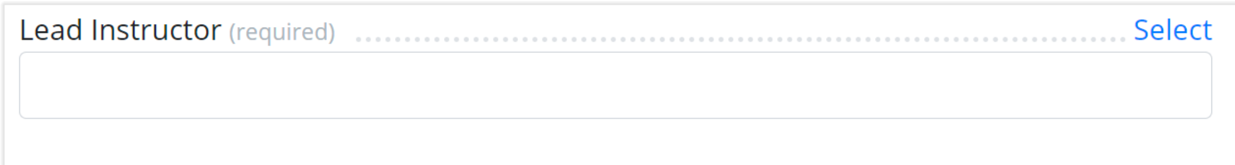


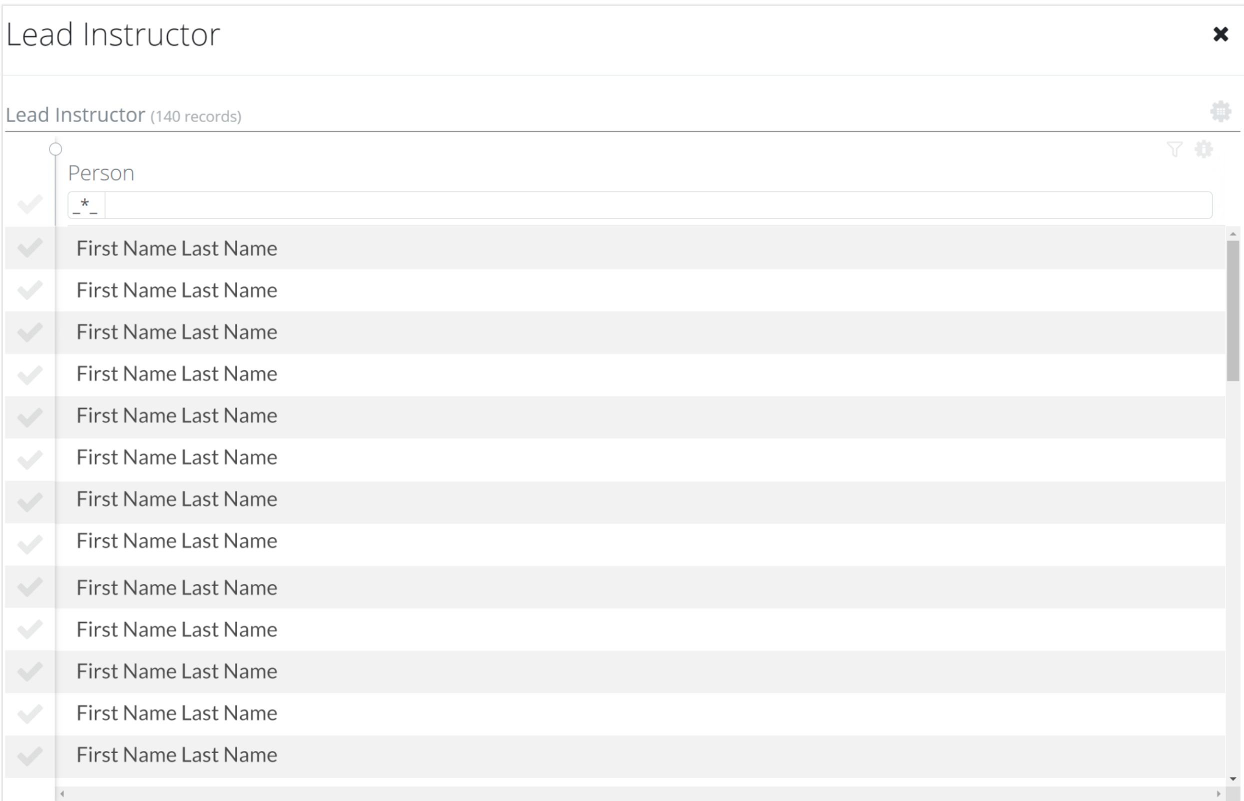
All that needs to be done to select an individual is to click on the checkmark next to the name.

In accordance with the law, we have removed all names from the following picture.

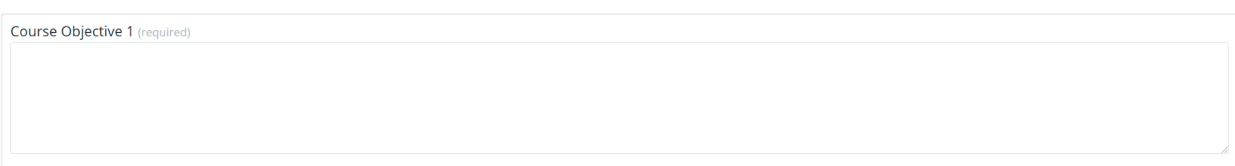


Lead Instructor - From the drop-down list, select the lead instructor for this course. You may identify up to two additional instructors for each session on the 7-Sessions tab. It's important to note the lead instructor should also be listed as the first instructor on each session of the 7-Sessions tab.



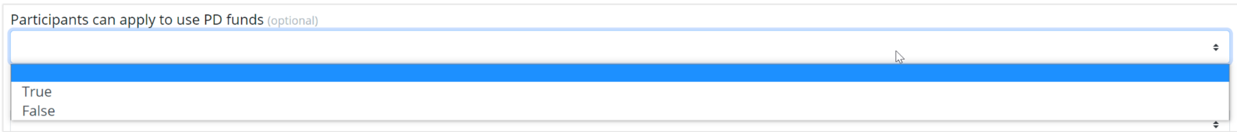


Course Objective 1 - 5 - Enter three (3) objectives for this course. WA state clients are required to enter at least 3 objectives. Optionally, clients can have objectives 4 and 5 made visible and then choose to make them required or not.



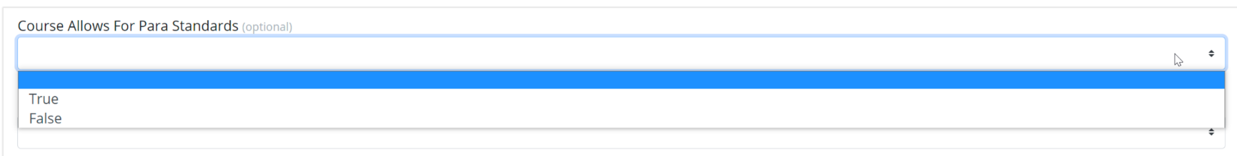
Participants Can Apply to Use PD Funds - Used with the Use PD Funds default.

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 to the use of PD funds for this course.



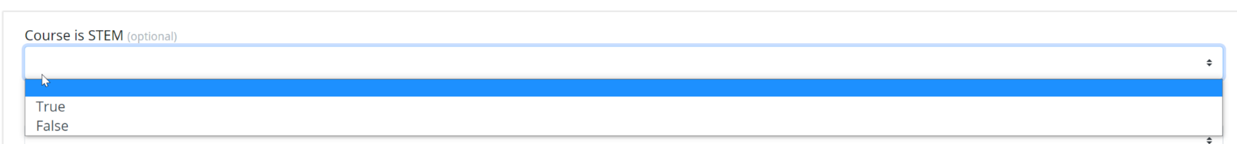
Course Allows for Para Standards - Set to true if the course meets the state qualifications for a PARA course.

An additional form will open. The requestor will complete the form indicating which para standards the course covers and/or which certificate they are 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 requestor will complete the form indicating which of 2 of the 4 STEM components the course meets and answer the 3 questions. Make sure to save their work after answering.
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 or not to use this field.

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. TPEP course must meet 1 of the 8 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 and 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 First Aid are offered where the course is the same but offered on different dates. A text box will appear when checked, and you can enter if any changes were made based on feedback from prior course evaluations.