

Setting up a Course Section – Global Reference

Non Unit Specific Training

Material updated July 2020



Search Results

0001-Marine Extension Aquarium Visitation

Section	Term	Program Areas	Instru
<input type="checkbox"/> 001	Outreach Programming FY22	PA0003-Marine Extension Programs	

Export options: CSV | Excel | XML

0002-State Botanical Garden Visitation Numbers

Section	Term	Program Areas	Instru
<input type="checkbox"/> 001	Outreach Programming FY22	PA0001-State Botanical Garden of Georgia Programs	

Export options: CSV | Excel | XML

0003-Celebrating the Harvest: The Art and History of Wreath-Making

Section	Term	Program Areas	Instru
<input type="checkbox"/> 001	Outreach Programming FY21	PA0001-State Botanical Garden of Georgia Programs	Carol

Export options: CSV | Excel | XML

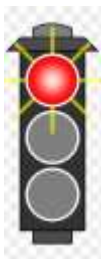
0004-Basic Botany

Section	Term	Program Areas	Instru
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Creating Section in a Course Master Record

New Section Creation– To create a section in a master record, Log into the PSO Registration System, and Go to the Curriculum Manager Module.

You will search for an existing course using any of the search criteria you choose.



Remember, course sections are the actual offerings of a class or event that the public can register for. You can use a Course Master record multiple times, but a section is unique to each offering.

A screenshot of the Curriculum Manager web application. The header is red with a white bird logo and the text "Curriculum Manager" and "Public Service and Outreach". Below the header is a navigation bar with links: "Courses" (underlined), "Calendar", "Certificates", "Instructors", "Locations", and "Associations". A green button labeled "New Session" is followed by the text "No Course Selected". The main section is titled "Course / Section Search" and contains search fields for "Course No.:", "Section No.:", "Keyword:", and "Title:". There is a blue "Search" button and a "Search Type:" dropdown menu set to "Contain". A link "Show advanced search options" is below the search fields. At the bottom are two buttons: a blue "Search" button and a green "Propose New Course" button.

Curriculum Manager Public Service and Outreach

Courses | Calendar | Certificates | Instructors | Locations | Associations

New Session No Course Selected

Course / Section Search

Course No.: Section No.: Search

Keyword: Title: Search Type: Contain

Show advanced search options

Search Propose New Course

Creating Section in a Course Master Record

Find and select your Course from the search results. Click on the course name to go begin your section setup



Search Results

0001-Marine Extension Aquarium Visitation

<u>Section</u> ▾	<u>Term</u>	<u>Program Areas</u>
<input type="checkbox"/> <u>001</u>	Outreach Programming FY22	PA0003-Marine Extension Pro

Export options: CSV | Excel | XML

0002-State Botanical Garden Visitation Numbers

<u>Section</u> ▾	<u>Term</u>	<u>Program Areas</u>
<input type="checkbox"/> <u>001</u>	Outreach Programming FY22	PA0001-State Botanical Garde Georgia Programs

Export options: CSV | Excel | XML

0003-Celebrating the Harvest: The Art and History of Wreath-Making

<u>Section</u> ▾	<u>Term</u>	<u>Program Areas</u>
<input type="checkbox"/> <u>001</u>	Outreach Programming FY21	PA0001-State Botanical Garde Georgia Programs

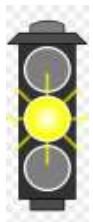
Export options: CSV | Excel | XML

Creating Section in a Course Master Record

Navigate to the Sections section of the Master Course Record

Options

- Add a New Section - When you need to create a section from scratch. This will be your most common function in the system the first year.
- Copy to New Section – When you have a repeat offering of a previous class in a course
- Copy to Existing Section – When you created a section but want to go back and copy settings to an existing section.



We are going to Add a New Section in this document

Sections

1 items found, displaying 1 to 1.

	<u>Section</u>	<u>Term</u>	<u>Status</u>	
<input checked="" type="radio"/>	001	Outreach Programming - FY21	Proposed	

Copy To New Section

Add New Section

Copy To Existing Section

Course Availability

Restrict section enrollments to the following groups with contracts. Selecting this option will

Creating Section in a Course Master Record

Setting up your Section

Section Title – This is where you can uniquely name your section with your course. This can be very specific

Example – Botanical Garden courses may include a location in this field for classes that occur outside of the Athens area, or the month that the event occurs in

Transcript Title – If a course shows on a transcript, you can define how it appears here

Hours – This is a field that pulls from the Master record but allows you to set section level overrides for CEU awarding

Class Size Options

- Max Enrollment Size – Maximum students that can enroll in a course
- Min Enrollment Size – Minimum number of students that are required for a class to occur. (This settings impacts low enrollment workflow)
- Max Wait list Size – If you allow a waitlist for a section, you can set its size here
- Activate Wait List – How many days in advance of the class can participants join the wait list.

Course No.: 0005

Section: to be assigned

Section Title: * Full Moon Hike Series - October

Transcript Title:

Term: * Outreach Programming - FY21

	Course	Section Calc.	Section Override
Hours			
Maximum Hours	1.5	N/A	N/A
Continuing Education Units (CEUs)			
Maximum CEUs	0.00	0.00	<input type="text"/>
Class Size			
Max Enrollment Size *			<input type="text"/>
Min Enrollment Size *			<input type="text"/>
Max Wait List Size *			<input type="text"/>
Activate Wait List (days before start date): *			<input type="text" value="14"/>
<input type="checkbox"/> Allow Wait List for Enrollment Maximum categories			
<input type="checkbox"/> When a spot opens in this section, automatically invite the highest ranked Wait List student to enroll online			
<input type="checkbox"/> Student will be automatically moved to the back of the wait list after the opportunity window			
Opportunity Window Hours:			<input type="text" value="48"/>

Creating Section in a Course Master Record

Setting up your Section

Wait List Automation

- Allow Wait List for Enrollment Maximum categories – used when limiting registration maximum rules
- Automatically invite wait list students to register – Automatically emails the highest ranked wait list registrant when a spot opens in a class
- Wait list response Opportunity setting – Sets the amount of time the system waits on a participant to respond and register when a spot opens up in a class (set in hours)

Course No.: 0005

Section: to be assigned

Section Title: * Full Moon Hike Series - October

Transcript Title:

Term: * Outreach Programming - FY21

	Course	Section Calc.	Section Override
Hours			
Maximum Hours	1.5	N/A	N/A
Continuing Education Units (CEUs)			
Maximum CEUs	0.00	0.00	<input type="text"/>
Class Size			
Max Enrollment Size *			<input type="text"/>
Min Enrollment Size *			<input type="text"/>
Max Wait List Size *			<input type="text"/>
Activate Wait List (days before start date): *			<input type="text" value="14"/>
<input type="checkbox"/> Allow Wait List for Enrollment Maximum categories <input type="checkbox"/> When a spot opens in this section, automatically invite the highest ranked Wait List student to enroll online <input type="checkbox"/> Student will be automatically moved to the back of the wait list after the opportunity window			
Opportunity Window Hours:			<input type="text" value="48"/>

Creating Section in a Course Master Record

Setting up your Section


Section Due Date – This section sets due dates for assignments / activities associated with a course

- Can be set for number of days after enrollment, a fixed date, none, as well as potential grace periods

Section Reminder Service – Creates reminders for the coordinators that control automated notifications for the course. Multiple reminders can be set by clicking the plus icon after each event is defined.

Section Due Date

10 days after student enrollment
0 additional days per concurrent enrollment



Fixed Due Date 

None



Grace Period

0 days to be added to due date

Section Reminder Service

Predefined Events: 10 days before staff view enrollment end date  

Custom Events

Date:  Reminder? Description 

Creating Section in a Course Master Record

Section Approval Status – This controls the status of the section. There are multiple levels. This will be covered later

Applicability – Sets the section to public or private status

Section Availability - Allows you to restrict access to the section to specific companies, school, or family groups

Staff View Enrollment – allows you to set the dates that a unit staff member can handle back end registrations.

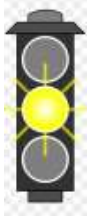
- Recommend that the end date for staff registrations continue for a set period of 15 days after the course occurs so that any late or day of registrations can be entered if needed.

Public View Availability – allows you to set the dates that the section will appear on the public web pages within the registration system. If you do not set these dates, then no public registrations can occur, even if they are allowed

Public View Enrollment – allows you to set the dates when a section registration can occur through the website. This can end earlier than the public view availability but not after.

Public view Late Enrollment Deadline – May not be in use for most PSO units, but can set the end of late enrollment.

Notify staff of new enrollments – Will send an email when selected type of registration occurs in a course



Course Approval Status: Final Approval

Section Approval Status:

Applicability:*

Immediate Approval Required

Section Availability
 Restrict section enrollments to the following groups with contracts. Selecting this option will hide this section from the Public View

Staff View Enrollment:

From to

Public View Availability:

From to

Public View Enrollment:

From to

Public View Late Enrollment Deadline:

Notify staff of new enrollments: Public View Staff View

Creating Section in a Course Master Record

Catalog Export– Allows you to set a section to be available in a marketing export process for Catalog creation

Provide Alternate enrollment link – Allows you to direct participants to an outside website to handle registrations. Only used when collaborating with a group/client that provides their own registration to joint classes/events

Available for enrollments by import- Always select yes. This will allow bulk registrations for a class to occur. Bulk registrations require the use of standardized template and data support.

Available for family checkout– Allows the registration of minors to occur by a parent or guardian without requiring a complete participant record to be completed by the minor. Recommended for any unit registering named minors for a course.

Allow Seat Reservations– Allows the registration / sale of multiple seats or spaces in a class or event without requiring each seat to have a named and existing participant record exist in the system. Recommend this always be selected for any event when a participant can purchase more than one space.

Allow Public View Drop Requests– Allows a registrant to request to drop a course from the participant portal. IF you do not want this feature active, select the Until 0 days after enrollment option. Days can be set for any option

Allow Public View Transfer Requests– Allows a registrant to request to transfer a registration from one course to another from the participant portal. Same recommendations as Drop requests

Grade Levels– Will populate from the Course Master Record settings and you can remove options or add as the individual section needs reflect.

Available in Catalog Export? * Yes No

Provide alternate enrollment link? Yes No

Available for enrollments by import? Yes No

Available for family checkout? Yes No

Allow seat reservations? Yes No

Allow Public View Drop Requests:

Until days before start date

Until days after start date

Until days after enrollment

From  to 

Prevent requests by international students

Allow Public View Transfer Requests:

Until days before start date

Until days after start date

Until days after enrollment

From  to 

Prevent requests by international students

Grade Levels

Creating Section in a Course Master Record

Section Text Edit Fields

- Section Notes (public) – Section notes that are shown on public facing web pages. Show at time of registration and in participant portal
- Section Notes (internal, shown in Enrollment Manger) – Notes show when a staff member registers participants for sections of a course
- Class and Instructor Evaluation notes - Optionally enter notes for the student asking for an evaluation of the class and instructor. You may wish to include a link to a survey. This section can be included in an automated course completion email.

Section Notes (public):



Section Notes (internal, shown in Enrollment Manager):

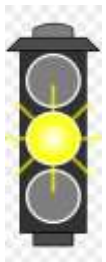


Class and Instructor Evaluation Notes:



Creating Section in a Course Master Record

Catalog Export– Section Materials allows you to create a list of materials that are required for a section. These can be internal or public. Public will allow the item to be shown to the participant so they can acquire the material.



If you need more information on this section, select help at the top of the registration system page that this screen is visible on. You will be directed to a page containing detailed instructions on how to set up your section materials. If you still need help, contact your unit representative or the PSO Registration helpdesk ticket system

Section Materials

Publish material list to Public View
 No materials
 No textbook

Materials Ordered:

Distributor Item No.: ISBN:

Required: Type: Stockpiled: Yes No Applicability:

Title: Distributor:

Publisher: Author: Edition: Ed

Publisher: Author: Edition: Edition Status: Availability Date:

Copyright: Price:

Description: Internal Notes:

Nothing found to display.

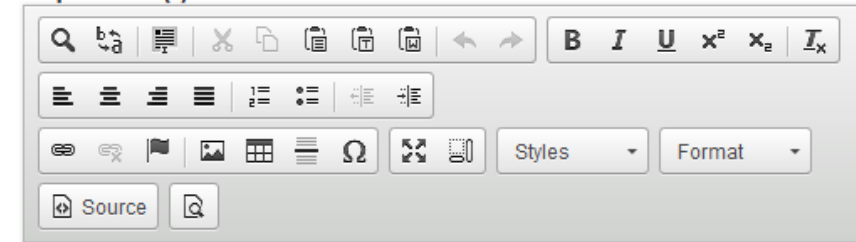
Creating Section in a Course Master Record

Required Text(s) – Optional field that is public facing, list any readings or text that are required for a section.

Recommended Texts – Optional field that is public facing, lists any readings that are recommend for a section.

Course Outline – Optional field that allows for a short description of a course outline for a section.

Required Text(s)

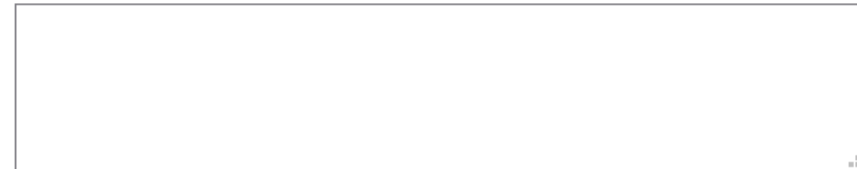


Paragraphs: 0, Words: 0, Characters (with HTML): 0

Recommended Texts



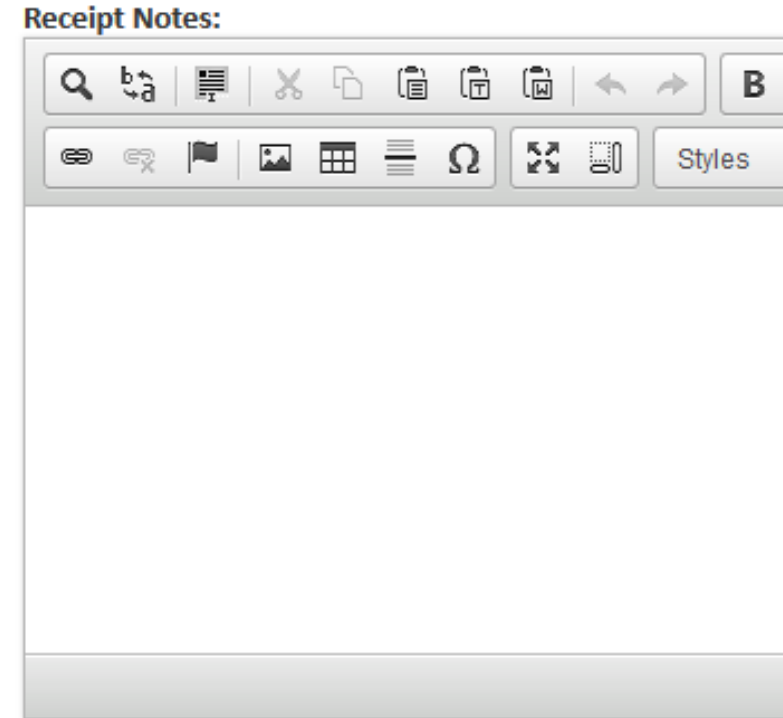
Course Outline



Creating Section in a Course Master Record

Receipt Notes – This is a very important field for passing information to participants when the registration occurs. Any section specific information that needs to be passed to a person who registers for a course can and should be included here. Information such as parking, zoom in

Receipt Notes:



A screenshot of a rich text editor toolbar. The toolbar is divided into two rows of icons. The first row includes a magnifying glass (search), a curved arrow (undo), a straight arrow (redo), a bold 'B' icon, and a list icon. The second row includes a link icon, a flag icon, a table icon, a list icon, a link icon, a link icon, and a 'Styles' dropdown menu. Below the toolbar is a large, empty text area.

Partner Groups

Corporate partnerships and sponsors are listed here.

None

Add Group

Creating Section in a Course Master Record

Online Resources – This section allows you to provide the student access to a resource that is available through the internet. Access to these resources are not shown unless a registration has been completed, and the participant must log in through the PSO participant portal access the information.

Fields in the Online Resource Section

- Name – How the resource is presented to the participant in the portal.
- Link – URL to the resource
- Applicability – Is this material accessible by a student/participant, Teacher, or All. If you limit to teacher, only instructors listed for the section will have access to this resource
- Default Access Start Date – Date the resource becomes available in the participant portal. PSO will most likely used Date of enrollment, Start date of section, or a defined date
- Default Access Expiration – This field allows you to set the access to a limited number of days or set a specific date the resource is no longer available to the participant.



This is going to be a useful section for units to use to provide access to videos that are hosted on Kaltura, access to zoom rooms that are for classes (easy way for access to rooms set with a waiting room and not a password), and other online topics

Online Resources

Name * Link * Applicability Student

Online Resource Link has to start with "http://"

Nothing found to display.

Applicability Default Access Start Date: * Date of Enrollment Depends on Term (Current or Future) Start Date of Section

Default Access Expiration: * days of access

Creating Section in a Course Master Record

Section Alert– This section functions the same way the course alert functions for the Master Record. Please review Course alert in Creating a Course Master Record if you need information

Comments – This section functions the same way the comments section functions in the Course Master Record. Please review Course Comments in Creating a Course Master Record if you need information

Save your Course - This step will set your course section to the initiated status. By saving we will also have new fields that appear.



Set Section Alert Yellow

Comments

General

Set Comment Alert

Show Comment in Enrollment Manager

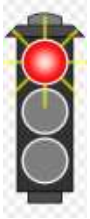
Nothing found to display.

Section Approval Status History

Nothing found to display.

Print Section Profile (with Fees and Budget)

Creating Section in a Course Master Record New Fields Available after Save



Once your section has been saved for the first time. The Registration system will now add additional fields within the page that you can complete. The following pages will focus on the NEW fields that have appeared .

Immediate Approval Required – This new field is a visual option only. It does not create a workflow or automatically approve the section. Units will not use this field.

Course Approval Status: Final Approval

Section Approval Status:

Applicability:*

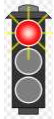
Immediate Approval Required

Section Availability

Creating Section in a Course Master Record New Fields Available after Save

Located between the Section Reminder Service and Section Notes Fields are these New options:

Assigned Instructors – Allows you to assign instructors to the sections they will be teaching.



For more information on setting up and managing instructors, review the Instructor Creation materials

Instruction Methods – This is a way to classify the methods that a class will be delivered. Used with the options that will be available in the scheduling block, you will be able to define how your class or event will occur. This list is predefined by the PSO Registration System. New additions can be requested if needed.

Correspondence Materials & Proctored Exams – The PSO system does not include the Proctored Exam module, so you will not enable any of these features

Scheduling – This section allows you to define exact dates the class or event will take place. You can define a schedule that will cover a single day or multiple days, either concurrent or set over an extended period of time.



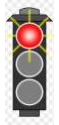
Please review the training on setting a Course section Schedule for more information

The screenshot displays a web interface for creating a course section. It includes several sections:

- Assigned Instructors / Graders:** A section with the text "Nothing found to display." and an "Add Instructor" button.
- Instruction Methods:** A list of methods including "Classroom - IN0001" and "Tour / Hike - IN0009".
- Correspondence Materials and Proctored Exams:** A section with two checkboxes: "Enable correspondence materials tracking for this" (checked) and "Enable proctored exam options for this section" (unchecked).
- Scheduling:** A section with a "Distance Section" checkbox (unchecked) and two radio button options: "Students complete section on their own schedule" (unchecked) and "Students complete section on the last section schedule" (checked). There is also an "Automatically set student completion date for" checkbox (unchecked).
- Date and Time:** A section showing "Wed 7:00PM - 8:30PM" and "02 Sep 2020".
- Buttons:** "Add Schedule Block" and "View All Dates" buttons are located at the bottom of the scheduling section.
- Section Notes (public):** A section at the bottom with a text input field.

Creating Section in a Course Master Record New Fields Available after Save

Prerequisites - This section is now active to start adding prerequisite rules to a course section



You will need to review the Enrollment Restrictions, Maximums, Prerequisites, and Exam proficiencies for a walk through of this area

Your Course needs to be saved at the bottom of the page if you have made any additional changes to these fields or your adjustments will not be made.

Prerequisites

This course has no prerequisites defined.

This section has no prerequisites defined.

Add Prerequisite

Section Approval Status History

Name
James Gilstrap
James Gilstrap

Save

Reset

Print Section Profile (with Fees and Budget) ▼

Print

Course Section – Steps remaining to Finalize

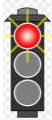
Now that you have your course section in the initiated approval stage, you will start to move it to final approval so that registrations can occur. The system requires the following to be completed before you can finalize a section

- You must have a defined Section Schedule – a course can go through all approval stages except final with a TBD assigned schedule.



- Review the Setting up Course Section Schedules for a detailed understanding of course schedules

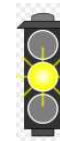
- You must define Fees – You must have at least 1 defined fee for the course or the system will not allow you to move the section to final approval. This can be a tuition profile or a flat fee



- Review the Setting up Course Section Fees; Creating Tuition Profiles; Creating Special Requests; Creating Discounts; and Creating Service Charges for more information on creating a section fee

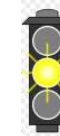
Course Section Status Notes

Setting Approval Statuses – Not all units will require a complex approval status. The registration system requires a section to go through a minimum of Initiated and proposed before you can move a section to final approval.





- If you start a section setup before a Course Master Record is in the Final Approval Stage, you will have to go through more approval steps. If your unit does not have a complex approval, do not set up a course section before the Master record is set to final approval

- Some Units may use the status feature as an internal way of course tracking that does not involve an approval process:





- SBG and MAREX will potentially will use the initiated, proposed, and Final Approved as a way of tracking where a school is in booking a trip to their facility. Consult with your unit Registration representative for details on how you will used the statuses

Course Section – Steps remaining to Finalize

- You must have a defined Section Schedule – a course can go through all approval stages except final with a TBD assigned schedule.
 - Review the Setting up Course Section Schedules for a detailed understanding of course schedules
-  You must define Fees – You must have at least 1 defined fee for the course or the system will not allow you to move the section to final approval. This can be a tuition profile or a flat fee
-  Review the Setting up Course Section Fees; Creating Tuition Profiles; Creating Special Requests; Creating Discounts; and Creating Service Charges for more information on creating a section fee

Course Section Status Notes

Setting Approval Statuses – Not all units will require a complex approval status. The registration system requires a section to go through a minimum of Initiated and proposed before you can move a section to final approval.

-  If you start a section setup before a Course Master Record is in the Final Approval Stage, you will have to go through more approval steps. If your unit does not have a complex approval, do not set up a course section before the Master record is set to final approval
- Some Units may use the status feature as an internal way of course tracking that does not involve an approval process:
 -  SBG and MAREX will potentially will use the initiated, proposed, and Final Approved as a way of tracking where a school is in booking a trip to their facility. Consult with your unit Registration representative for details on how you will used the statuses

Conclusion – Recommended next Steps for Course Section Creation

Next Steps

- Review Course Section Schedule Setup
- Review Course Section Fee Setup
- Review Tuition Profile Creation
- Review Special Request Creation
- Review Discount Creation
- Review Service Charge Creation
- Review Instructor Setup
- Review Course Grading Setup – If needed

Setting up a Course Section – Global Reference

Non Unit Specific Training

Material updated July 2020



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Section	Term	Program Areas	Instru
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Export options: CSV | Excel | XML

0004-Basic Botany

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