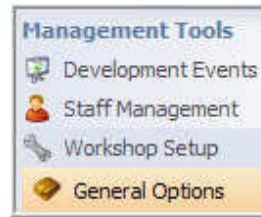


Workshop Setup

Workshop Setup allows you to configure the various settings and parameters that determine how Workshop functions. These elements are typically established during initial startup and then left alone. Remember to **Save Changes** after making any modifications.

General Options

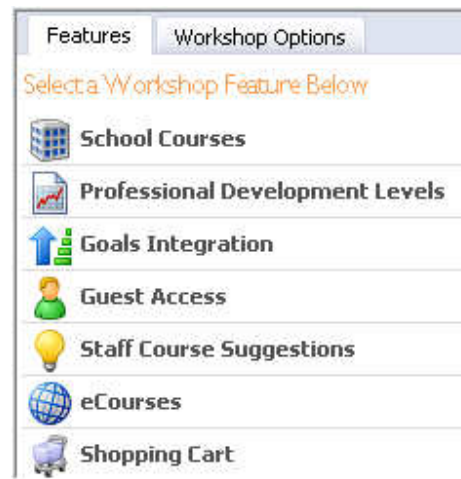
Under the *Manage* Tab, **General Options** allow districts to customize Workshop to meet their individual needs.



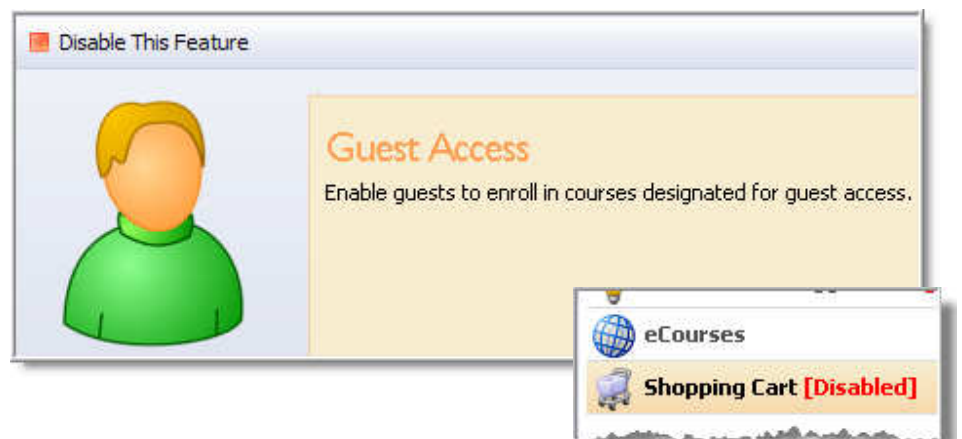
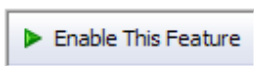
Features Tab

Selecting a particular Workshop feature will display the description at the bottom of the screen.

Additional information about these features is explained in later sections of this manual.



Use the toggle on the toolbar to **Disable This Feature** or **Enable This Feature**. Disabled features will display **[Disabled]** to the right of their names.

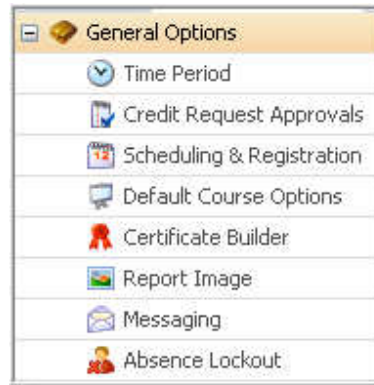


Workshop Options Tab



General Options

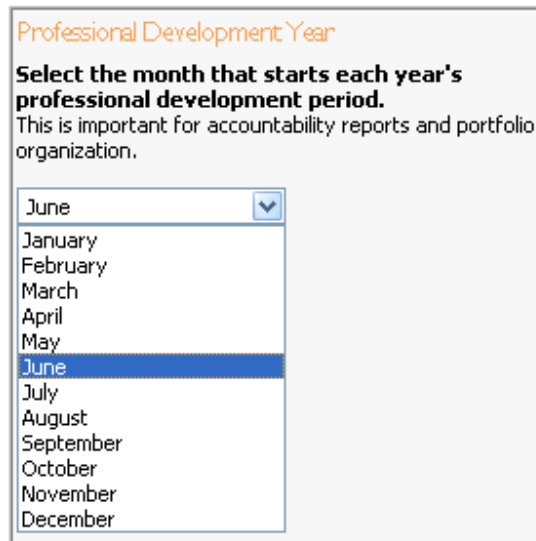
Setting these options will affect the entire district. Expand the list under the General Options heading by clicking on the + sign to the left of the heading.



Time Period

From the drop-down list, select the month that starts each year's professional development period.

This is important for accountability reports and portfolio organization.



Credit Request Approval

Automatically approve – Every credit request from staff members will be approved and updated in their portfolios.

Principals approve – Credit requests from staff members will be directed to the respective principals for approval.

Professional Development Managers approve – Credit requests from staff members will all be directed to the Workshop Professional Development Administrators.

Edit Credit Requests – After a staff member submits a credit request, the administrator has the option to edit the details (number of credits and credit type) before approving.

Credit Request Approval

Select an option for credit request approval.
Note: this is not the same option for professional development levels.

Automatically approve requests for credit.

Principals should approve credit requests.

Professional development managers should approve requests.

Edit Credit Requests

Allow Workshop administrators to edit approved credit requests

Note: If specific credit types have a designated approver, then that person must approve the request first before credit is granted.

Scheduling & Registration

General Course Scheduling Guidelines:
Scheduling guidelines allow districts to control the default timelines for staff registration.

Set the default registration timelines for all courses that are created using the drop-down options.

Note: This is only the default setting. These can be edited within each particular course.

Registration Conflicts: Specify whether or not to allow partial credit by preventing registration conflicts.

Registration Service: Temporarily pause registration for all staff members by clicking on the link. Staff members will be notified of the pause in registration when viewing a course. This option is a toggle. Click once to enable the pause, and click again to disable it.

General Course Scheduling Guidelines

New courses should use the following scheduling guidelines:

Staff members should be able to view new courses
6 Week(s) before a class begins.

Staff members should be able to register for courses
6 Week(s) before a class begins.

Registration should close 1 Day(s) before a class begins.

Registration Conflicts

Attendees should **not** be able to register for two courses at the same time

Registration Service

Temporarily Pause Registration for Staff Members

Email Messaging

Messaging options control how Workshop will communicate with staff members.

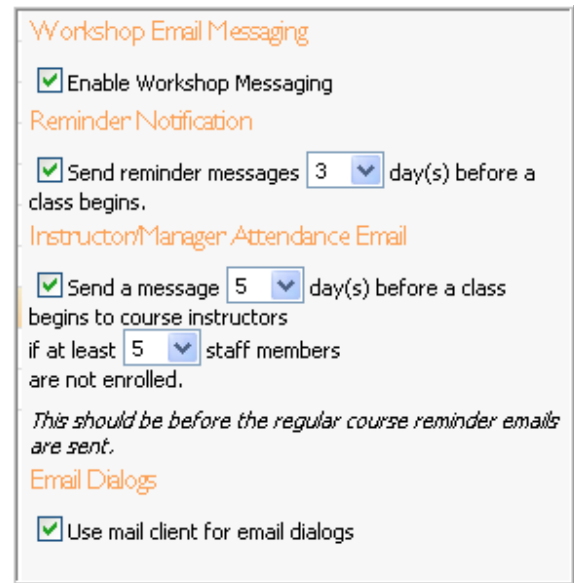
Enable Messaging: Uncheck this box to disable email messaging. No email messages will be sent while this is unchecked.

Reminder Notification: Registered course attendees can receive an email reminder prior to the course start date. Workshop administrators determine when this email goes out by changing the settings in this section.

Instructor/Manager Attendance Email: Workshop administrators can choose to automate emails informing instructors of courses that may not have enough attendees enrolled. Specify how many days before a course begins that this notification should be emailed. Also, specify the minimum number of enrollees to prevent this notification.

Note: This is only an email. No action automatically occurs to cancel or postpone the course.

Email Dialogs: If checked, Workshop will launch the Windows default email client when sending emails.



The screenshot shows the 'Workshop Email Messaging' settings panel. It includes a checked checkbox for 'Enable Workshop Messaging'. Under 'Reminder Notification', there is a checked checkbox and a dropdown menu set to '3' days. Under 'Instructor/Manager Attendance Email', there is a checked checkbox, a dropdown menu set to '5' days, and another dropdown menu set to '5' staff members. A note states: 'This should be before the regular course reminder emails are sent.' At the bottom, there is a checked checkbox for 'Email Dialogs' and a sub-section 'Email Dialogs' with a checked checkbox for 'Use mail client for email dialogs'.

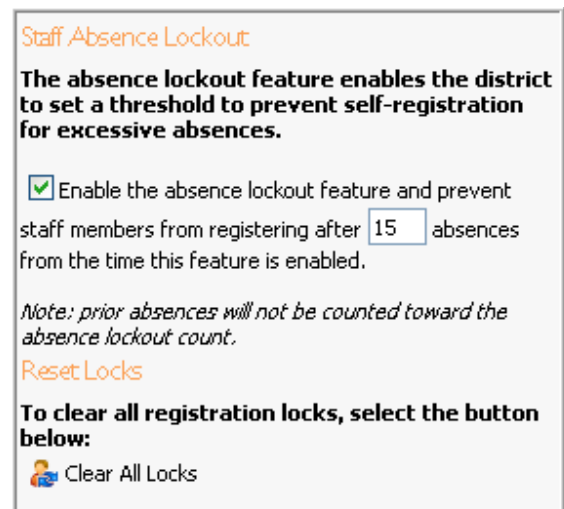
Absence Lockout

Staff Absence Lockout: This feature allows districts to prevent frequently absent staff from registering for courses.

If enabled, the lockout feature specifies how many absences should be allowed before a staff member is locked out. As noted, prior absences will not be counted.

Note: Manual lockout will not be available unless this option is enabled. If a district does not want to use automatic lockout, only manual, then set the number of required absences to a value that cannot be reached.

Reset Locks: By clicking on the **Clear All Locks** link, all staff members that have been locked out will be restored. Once restored, absences that counted toward the lockout will no longer count. Staff portfolios will still reflect the absence, but these absences will no longer count towards a future lockout, only new absences.



The screenshot shows the 'Staff Absence Lockout' settings panel. It features a bold heading: 'The absence lockout feature enables the district to set a threshold to prevent self-registration for excessive absences.' Below this is a checked checkbox and a dropdown menu set to '15' absences. A note states: 'Note: prior absences will not be counted toward the absence lockout count.' Under 'Reset Locks', there is a bold instruction: 'To clear all registration locks, select the button below:' followed by a button labeled 'Clear All Locks' with a person icon.

Certification Management

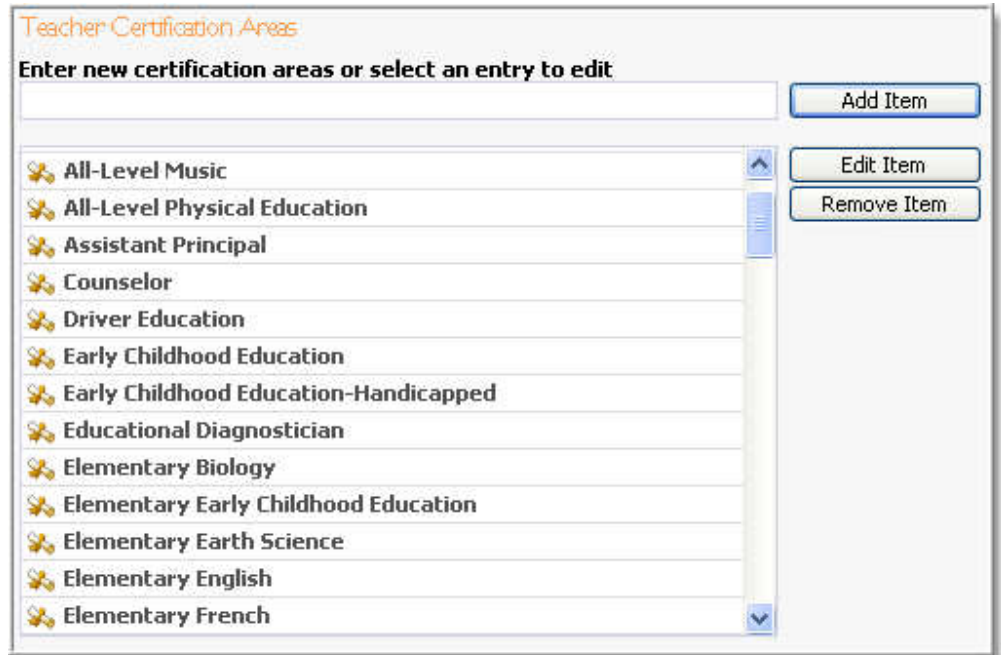


Certification Areas

Teacher Certification Areas:

This section provides the list of all possible certifications held by educators.

Note: As the state renames and changes certification areas, use the **Add**, **Edit**, and **Remove** buttons to update this list.



SBEC

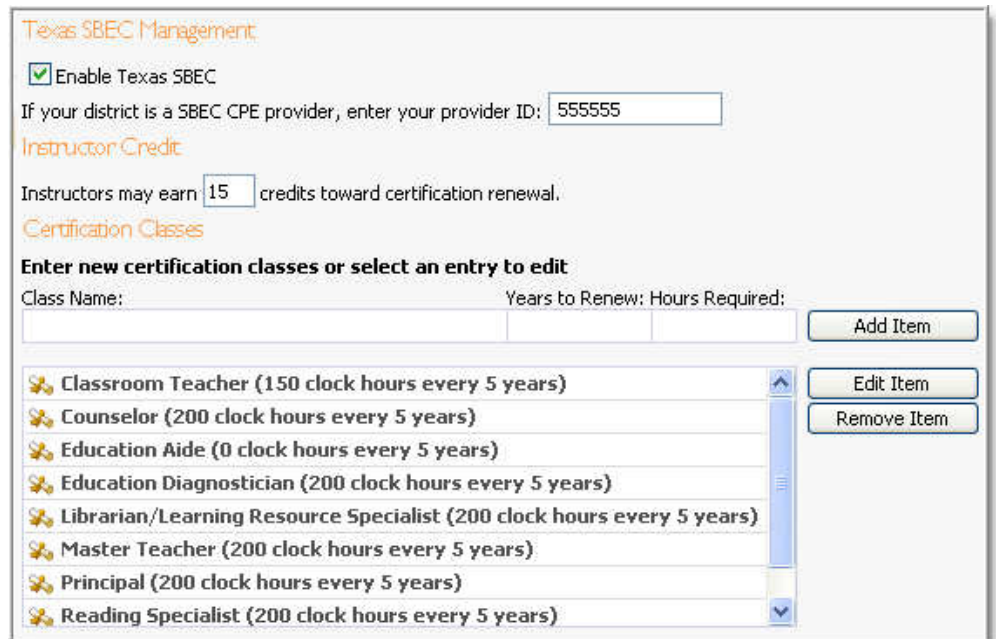
Texas SBEC Management:

Check the box to allow your district to specify your SBEC number and certification classes.

By default, Texas SBEC will be enabled. Simply uncheck the box to disable that feature. Enter the SBEC CPE Provider ID.

Instructor Credit: Set the number of credits instructors may earn towards certification renewal.

Certification Classes: Districts can modify the criteria for certification renewal. Use the **Add**, **Edit**, and **Remove** buttons to modify these classes as the state changes requirements.

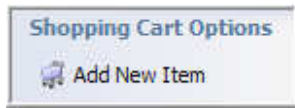


Shopping Cart

The Shopping Cart is an easy way to track rewards based on professional development credits. The cart is composed of a series of items with various details and credit costs. Workshop can track inventory and purchases within the shopping cart.

Add New Shopping Cart Items

Select **Add New Item**.



Complete the Wizard with title, description, and initial quantity on hand. If an unlimited quantity exists, select "Do not track quantities." Select **Next** then **Finish**.

Repeat this process for all items in the Shopping Cart inventory.

A wizard form titled "New Shopping Cart Item" with a light blue header. Below the header is the instruction: "To create a new shopping cart item, enter the details of the item below." The form contains three main sections: "Item Title:" with a text input field; "Description:" with a large text area and vertical scrollbars; and "Initial Quantity On Hand:" with a text input field containing "0" and a checkbox labeled "Do not track quantities".

Item Details Tab

Edit the title, description, and quantity as needed. The **Options** heading allows districts to disable quantity tracking, automatically approve requests, and allow multiple rewards.

Credits Required: Specify which credits are required to purchase this item. Each credit type that is allowed for the shopping cart will be displayed here. Each credit type displayed can have various values, and each value will have to be met in order to purchase the item.

A form titled "Shopping Cart Item" with a light blue header. At the top are three buttons: "Save", "Inactive", and "Delete". Below the header is the instruction: "Edit the shopping cart item below." The form has three tabs: "Item Details" (selected), "Item Picture", and "Awards". A yellow banner below the tabs contains a blue information icon and the text: "0 items have been awarded and there are currently 0 requests." The main section is titled "Shopping cart item details" and contains: "Item Title:" with a text input field containing "1 GB Flash Drive"; "Description:" with a text area containing "Flash Drive, 1 GB"; "Quantity On Hand: 20" with a green plus icon and the text "Increase Quantity"; "Options:" with three checkboxes: "Do not track quantities", "Automatically approve requests", and "Allow multiple awards"; and "Credits Required" with a text input field containing "0".

Item Picture Tab

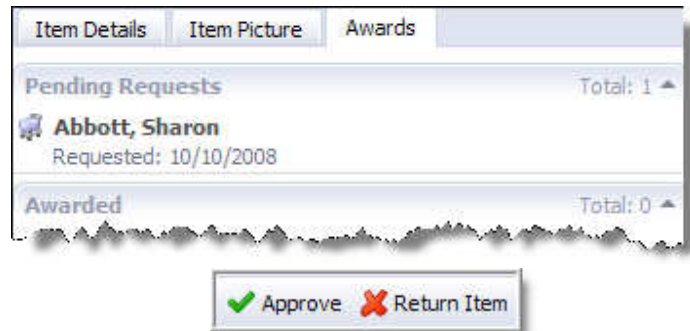
Browse for an image and upload it. This image will appear along with the item description in the shopping cart for staff members.



Awards Tab

View a list of all Pending Requests and Awarded items. Use this tab to approve pending rewards if requests are not automatically approved.

Select the individual request and **Approve** or **Return Item** to the staff member.



Active/Inactive button: Toggle to make the item available to staff for purchase from the cart or hide it from view.

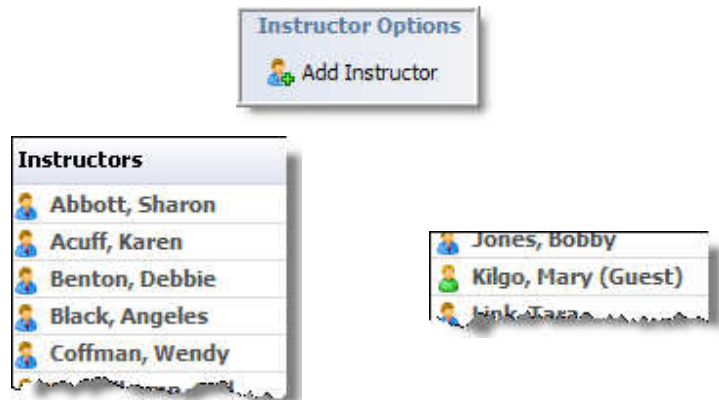
Save or **Delete** as necessary.



Instructors

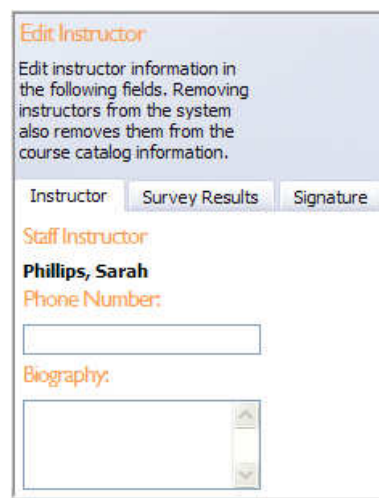
Add Instructors to the list by selecting the **Add Instructor** link in the lower left corner. Choose either a **Staff Member** or a **Guest Instructor** as the instructor type. Enter the name or email address to locate a user account.

Note: Before adding a guest to the Instructors list, that guest account first needs to be created under **Guests**. (Enabling this feature is discussed later in the manual.) Guests are identified in the Instructors list.

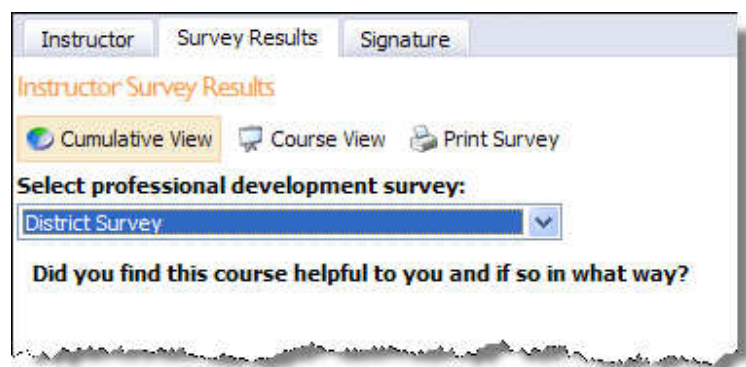


Edit Instructor

Instructor Tab: Update the phone number and biography for an instructor.



Survey Results Tab: Survey outcomes are viewable as a Cumulative Report or by Specific Courses. Use the drop-down lists to choose the survey or course. Print the survey results as needed.

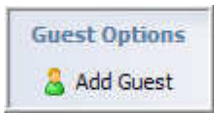


Signature Tab: Browse for an image to appear as the **Instructor's Signature** on course certificates.



















Guests

Add Guest: Click on the **Add Guest** link in the lower left corner to create a new guest account. Guest accounts can be used for instructors as well as attendees of courses as defined by the district.

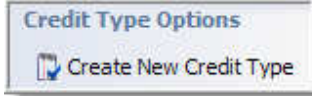


Enter first and last names, email address, and password for all guest accounts. Clicking on a guest's name will allow editing of their information.

Save or **Delete** as necessary.

Guests	 Save Guest  Delete Guest
 Blair, Tonya	<p>Edit Guest:</p> <p>Enter the information below for a guest account. Guest may logon to SchoolObjects for limited application access.</p> <p>Name</p> <p>First Name:</p> <input type="text"/> Last Name: <input type="text"/> Email Address: <input type="text"/> Guest Password: <input type="password"/>
 D, Aaron	
 Frederickson, Laura	
 Gail, Tonya	
 Guest, Captain	
 Guest, Guest	
 Jackson, Kevin	
 Kilgo, Mary	
 M, Colin	
 Smith, Ronald	
 Tapp, Michael	
 Tapp, Tonya	
 Tapp, Tonya	
 Test, Colin	

Credit Types



Create New Credit Type: Enter the details of the credit type under General Options, or select a specific credit type to edit the details.

General Options Tab:

- Title of the credit type
- A short description (optional)
- Should the credit type be active (default)
- Should the credit type be available for school courses (default)
- Should the type be available for outside credit (default)
- Should the type be available for hidden on the registration page
- Should the type be available for the shopping cart
- The image used to represent the credit type

Credit Review Tab: The district is able to assign a staff member to review and pre-approve the course credits which involve a specific credit type. **Add Staff** or **Remove Staff** as needed.

For example, the **Gifted & Talented (GT) Credit Type** could be assigned to the GT Coordinator. By assigning the GT Coordinator as the credit type reviewer, this allows the GT Coordinator to control requests for the GT credit type. The GT Coordinator would need to review all GT credit type requests before credit can be granted by the designated district or school approver.

Save, or **Delete** as necessary.

Course Categories

Course Categories help organize courses into particular areas for easier registration by staff members. Standard and Group categories can be created.



Standard Category: A single group of like courses

When creating a new **Standard Category**, enter the details of the course category, or select a specific category to edit the details.

- Category name
- A brief description (optional); This description will appear on the Course Registration page and will take up real estate.
- An alternate URL which can be used to redirect the user to an alternate registration site (i.e. regional service center, college, neighboring district, etc.)
- Category image

Group Category: A collection of subgroups of like courses

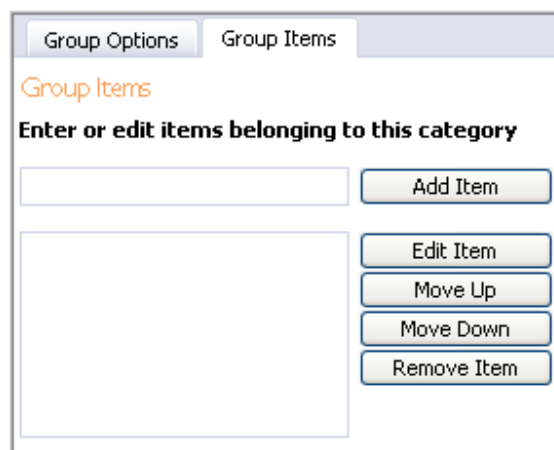
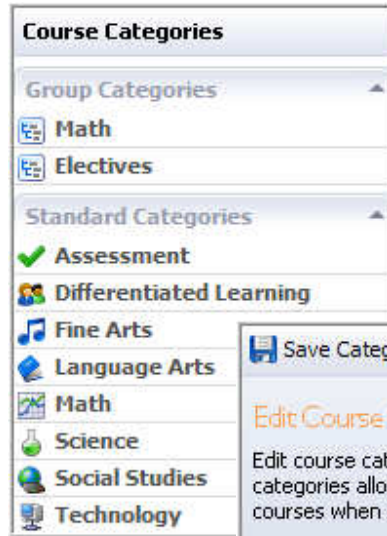
When creating a new **Group Category**, enter the details of the course category, or select a specific category to edit the details. Similar information is entered for both Standard and Group categories.

Note: Alternate URLs are not an option within Group Categories.

Group Items Tab: Enter subgroups to further define course categories.

For example, if **Math** is a Group Category, the group items might include "Elementary," "Middle," and "High" levels or items.

Save, or **Delete** as necessary.



Training Locations



When adding a **Training Location**, enter the details for the location, or select an existing location to edit the details.

Training Location Details:

- Location name
- Physical address of the location
- Driving directions to the location
- URL to an online map
- Maximum seating
Note: This number will NOT be used to determine registration cutoff.
- Any special notes about the location (optional)

Save, or **Delete** as necessary.

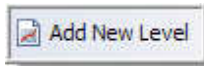
A screenshot of a web application interface for editing a training location. At the top, there are two buttons: "Save Location" (with a floppy disk icon) and "Delete Location" (with a red X icon). Below these is the title "Edit Training Location" and a brief instruction: "Edit training location in the fields below. Use a descriptive title, so that is easier to identify the location when creating courses." The form contains several sections: "Name" with a text input field; "Address Information" with a "Physical Address:" label and a text area; "Driving Directions:" with a text area; "URL to Online Map:" with a text input field; "Maximum Seating" with a numeric input field containing the value "0"; and "Special Notes" with a text area.

Professional Development Levels

Professional Development Levels


enable districts to configure the development levels for staff to achieve.

To create a new Level, select **Add New Level**.



General Tab:

Type a Title, Description and select an image to best represent the PD level.



Edit Professional Development Level

Navigate the tabs below to edit information about a professional development level.

General | Credit Requirements | Prerequisite Levels | Questionnaire | Staff

Professional Development Level Details

Title:
Gold

Description:

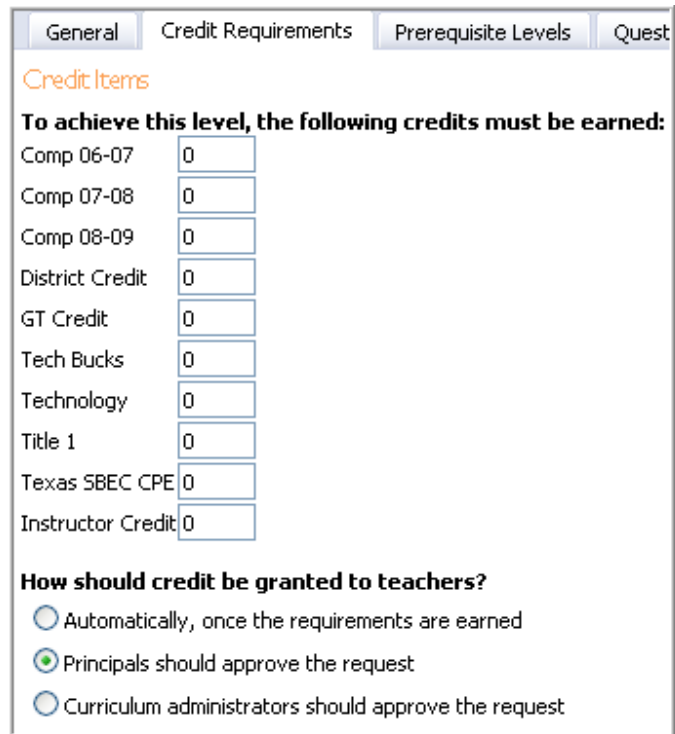
Program Image
Select an image that best represents the professional development program level.
★ Set Image

Credit Requirements Tab:

Credit Items: Enter the number of credits for each credit type that must be earned for a staff member to achieve the specific PD level. A combination of various credit types or just one credit type can factor into PD level achievement.

Granting Credit: Select how credit should be approved and granted to staff members.

- Automatically, once the requirements are earned
- Principals should approve the request
- Curriculum administrators should approve the request



General | Credit Requirements | Prerequisite Levels | Quest

Credit Items

To achieve this level, the following credits must be earned:

Comp 06-07	<input type="text" value="0"/>
Comp 07-08	<input type="text" value="0"/>
Comp 08-09	<input type="text" value="0"/>
District Credit	<input type="text" value="0"/>
GT Credit	<input type="text" value="0"/>
Tech Bucks	<input type="text" value="0"/>
Technology	<input type="text" value="0"/>
Title 1	<input type="text" value="0"/>
Texas SBEC CPE	<input type="text" value="0"/>
Instructor Credit	<input type="text" value="0"/>

How should credit be granted to teachers?

Automatically, once the requirements are earned

Principals should approve the request

Curriculum administrators should approve the request

Prerequisite Levels Tab:

If staff members must complete one professional development level before completing another level, select the prerequisite level here.

The screenshot shows the 'Prerequisite Levels' tab selected. The title is 'Prerequisite Professional Development Levels'. Below the title, it states: 'Staff members must already hold one of these professional development levels to qualify for this level.' There are two checkboxes: 'Gold' and 'Bronze', both of which are currently unchecked.

Questionnaire Tab:

Once credit is earned for a professional development level, questionnaire completion might be required of staff members. Enter a question and select **Add Item**. The item can be edited or removed.

The answers to the questionnaire will be included in credit requests that require principal or manager approval.

The screenshot shows the 'Questionnaire' tab selected. The title is 'Staff Questionnaire'. Below the title, it states: 'Enter any questions that should accompany a request to earn this level:'. There is a text input field and an 'Add Item' button. Below this, there are two existing items: 'Rate this program.' and 'How would you describe the experience to someone else?'. Each item has an 'Edit Item' button and a 'Remove Item' button.

Staff Tab:

This tab lists all staff members who have been awarded the PD level along with the date.

Assign Level – This allows district staff to manually award a professional development level to staff members or groups.

Change Award Date – The calendar is used to adjust the date awarded.

The screenshot shows the 'Staff' tab selected. The title is 'Staff Members Awarded'. On the left, there is a list of staff members, each with a small person icon and their name, followed by the date 'Awarded 11/2/2007'. The list includes: Admin, Intervention; Andrews, Lynn; Baskeyfield, Ronald; Benton, Debbie; and Black, Angeles. On the right, there are two buttons: 'Assign Level' and 'Remove Level'. Below these buttons is a calendar titled 'Change Award Date' for November 2007. The calendar shows the days of the week (S, M, T, W, T, F, S) and the dates from 1 to 31.

Course Surveys

A course survey is either required for attendees or not used at all. If required, attendees **MUST** complete a survey to receive credit for a course. Once the course has ended or the instructor has enabled the survey, attendees can complete and submit the survey. Once the course has been marked completed, the survey is no longer active and attendees cannot complete the survey.

Add New Survey to create a new survey in Workshop. If surveys already exist, select one from the list to copy and then edit its contents.

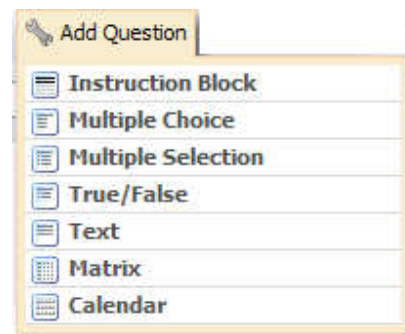
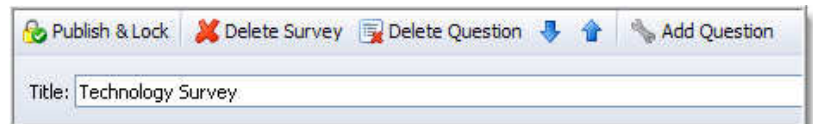
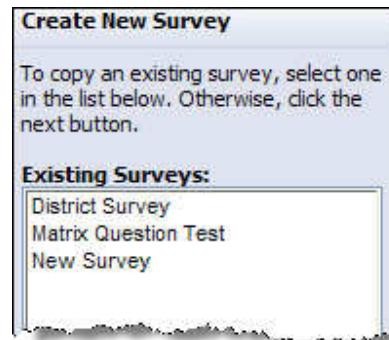
Give the survey a descriptive title. Begin adding questions by selecting Add Question. A list of question types will open.

- **Instruction Block** – Directions or information regarding the survey
- **Multiple Choice** – A group of choices and the attendee can select only one option that would apply to the question.
- **Multiple Selection** – A group of choices and the attendee can select as many options that would apply to the question.
- **True/False**
- **Text** – The attendee can type a response into the text field
- **Matrix** – Columns and rows that allow attendees to select from a range of choices. For example, rate aspects of the class by Outstanding, Satisfactory, Below Satisfactory, and Does Not Meet Expectations.
- **Calendar** – The ability to select a date on a given calendar

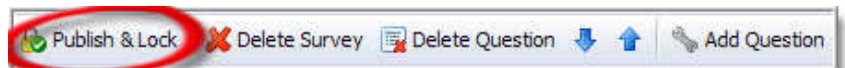
The question type will then appear as text in the list. Select "Click to Edit Question" to add the data to the question. Don't forget to click **SAVE!**

Options to Delete the Survey or Question are shown on the toolbar. Also, use the blue up and down arrows to edit the order of the questions.

Once complete, select **Publish & Lock**. As courses are created, the choices of all the surveys are displayed. Once a survey is published and locked, it cannot be changed due to the fact that data is already submitted based on that survey.



Click to edit question.



Goals

The goals section allows districts to align staff development courses to school and districts goals or improvement plans.

Select **Add New Document**. Insert the title with the school/district name.

Identify whether the document is a district-wide or a school/campus-based document. If school is selected, identify the correct school/campus next.

On the Goals Tab, enter the goal number and text. The goals can then be edited, moved, or removed.

Save or **Delete**.

Publish only when all components of the document have been entered and are ready to be displayed to district staff members.

In the future if the goals are modified, either **archive** the goal (especially if there are workshop courses connected to the goals) or delete it.

***** Report Alert *****

The **Goals report** displays district goals data assigned to course and portfolio events.

Create New Goals Document

To create a new goals document, enter a title below.

Goals Document Title:

Note: The title should have the school name included.

Is this a district-wide goals document or a school document?

Document Type:

District

School

Select a school associated with this goals document.

Select School:

- Blue Elementary
- Colors Administration
- Green Elementary

Save Publish Archive Delete

Goals Document

Enter the goals document details below.

Document Details Goals

Enter or edit goals for this document:

Goal Number:
(ex. I, II, III, etc)

Goal Text:

Add Item

a.. The science scores will improve through proper teacher education.

Edit Item

Move Up

Move Down

Remove Item

Custom Fields

Custom fields can be created to allow additional information to be requested or added to district courses. This feature allows districts to customize their workshop data.



In Custom Field Options, select Add Custom Field.

Complete the name and description of the field.

The Data Type drop-down allows administrators to choose the type of information to be entered by the attendee or manager. These types of data include:

- Text
- Number
- Decimal
- Currency
- Check Box
- Phone Number
- Option List *
- Long Text
- Date
- Date and Time

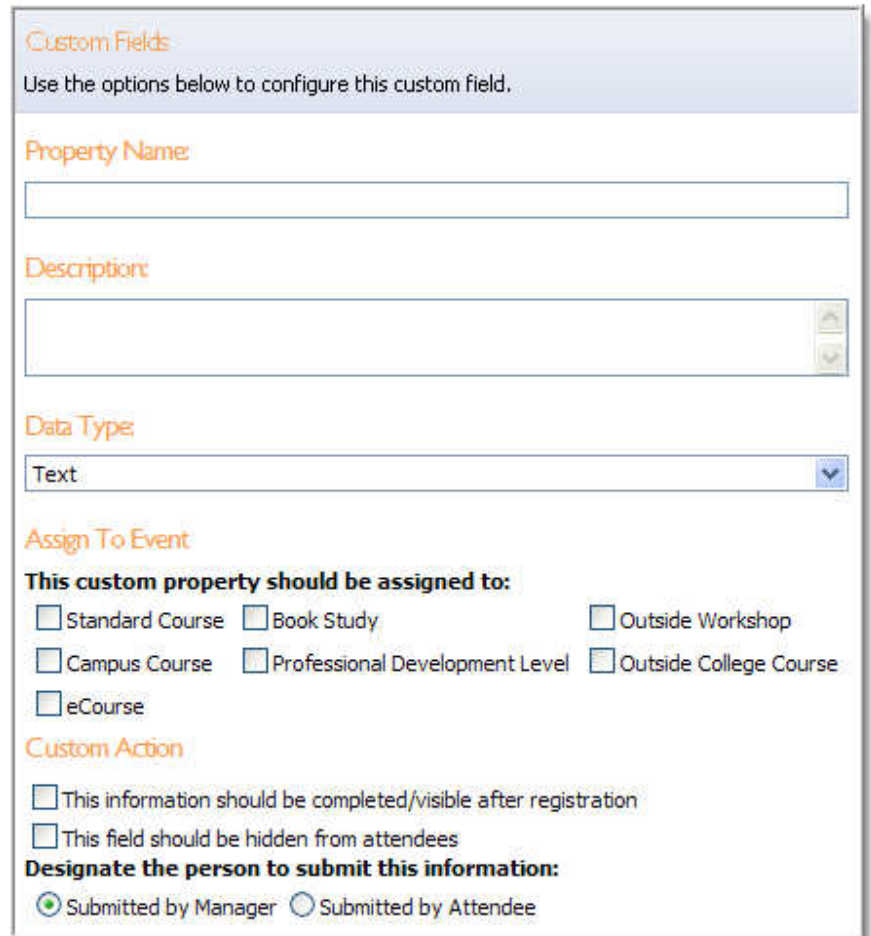
* An option list will allow the administrator to enter customized choices for the attendees.

Choose which types of events should contain each particular custom field.

Options include requiring the information AFTER registration and/or actually being hidden from attendees.

Designate either the Course Manager or the Attendee to submit the information.

After being saved, each custom property will be available in the designated event types.

A screenshot of the "Custom Fields" configuration form. The form has a light blue header with the title "Custom Fields" and the instruction "Use the options below to configure this custom field." Below the header are several sections: "Property Name" with a text input field; "Description" with a larger text area; "Data Type" with a dropdown menu currently set to "Text"; "Assign To Event" with a heading "This custom property should be assigned to:" followed by six checkboxes for "Standard Course", "Book Study", "Outside Workshop", "Campus Course", "Professional Development Level", and "Outside College Course", plus an "eCourse" checkbox; "Custom Action" with two checkboxes: "This information should be completed/visible after registration" and "This field should be hidden from attendees"; and "Designate the person to submit this information:" with two radio buttons: "Submitted by Manager" (selected) and "Submitted by Attendee".