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

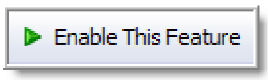
Under the *Manage* Tab, **General Options** allow districts to customize Workshop to meet their individual needs.

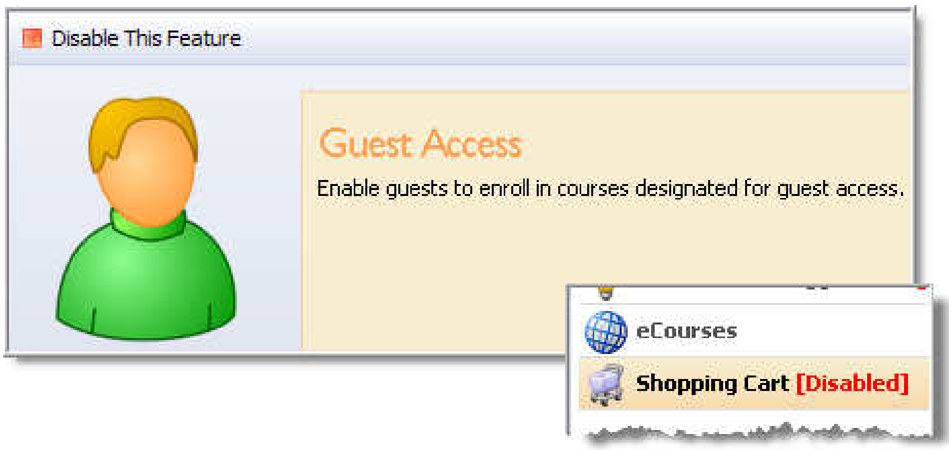
Features Tab

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.





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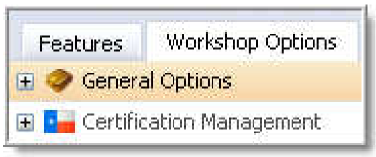
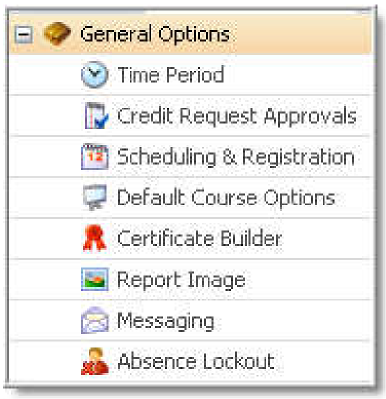
Workshop Options Tab



General Options

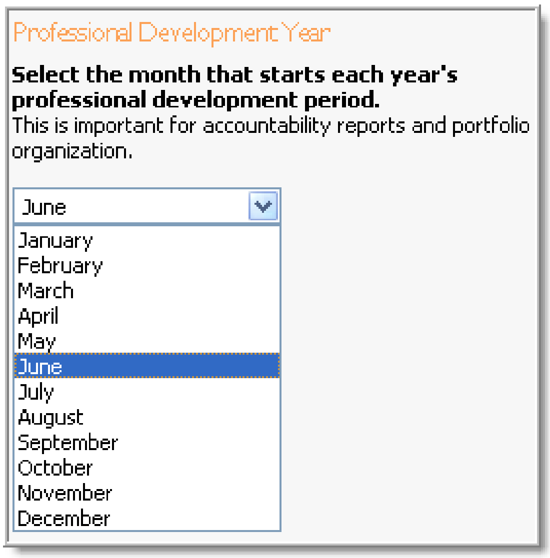
Setting these options will affect the entire district. Expand the list under the General Options heading by clicking on the **+** sign to the left of the heading.



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.



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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.

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

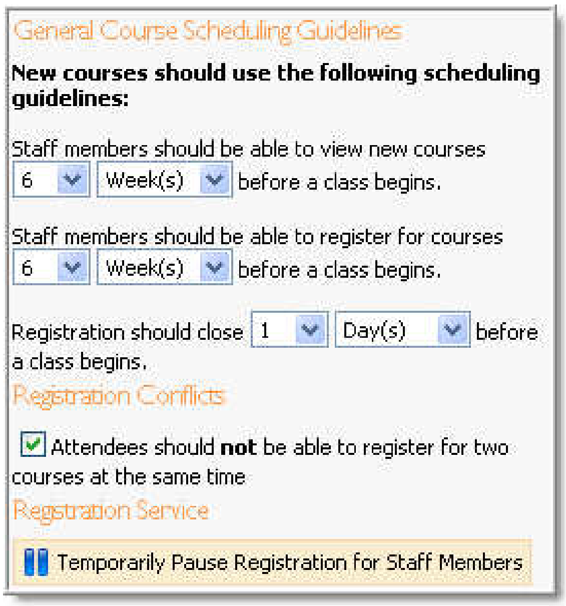
Scheduling & Registration

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.



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Default Course Options

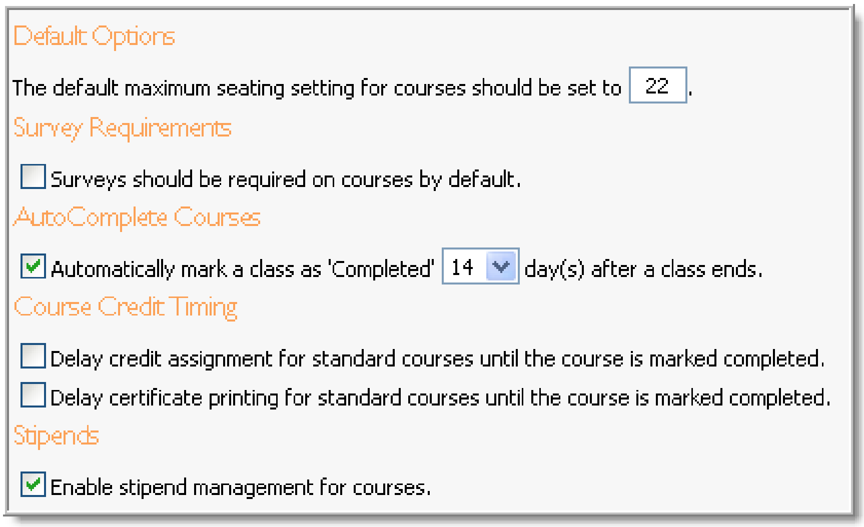
Default Options: Districts can define the default maximum seating for courses.

Survey Requirements: If a district requires surveys to be completed for every course, check this box.

Auto Complete Courses: Set the number of days after a class ends to automate the completion of the course.

Course Credit Timing: To delay either credit approval or certificate printing until the course is marked complete, check either or both of the boxes.

Stipends: To enable stipend management for courses, check this box. Details regarding stipends are defined in the management of individual courses.



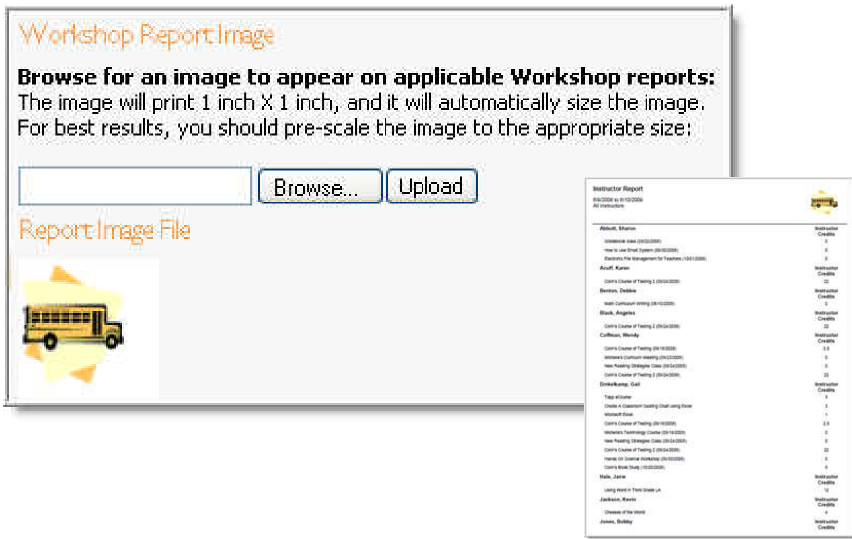
Certificate Builder

Browse for an image (district logo, seal, etc.) and upload it. The image will appear on Workshop certificates.

Note the image requirements for best results.

Report Image

Browse for an image (district logo, seal, etc.) and upload it. The image will appear on Workshop reports in PDF format.



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Email Messaging

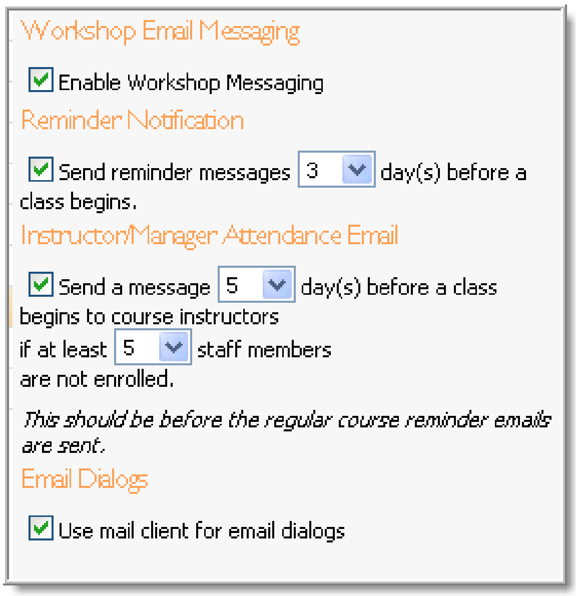
Messaging options control how Workshop will communicate with staff members.

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.



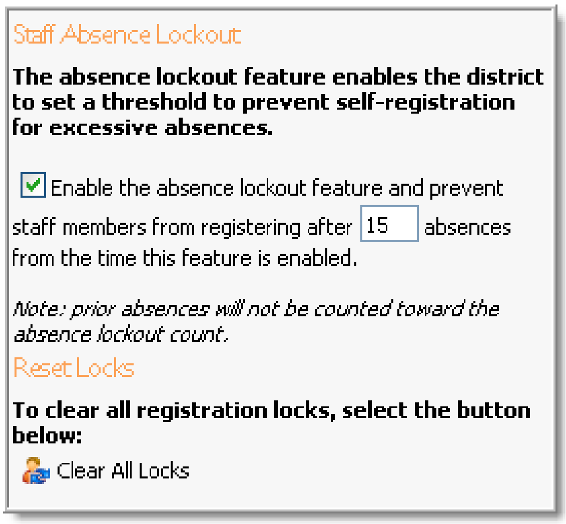
Absence Lockout

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.



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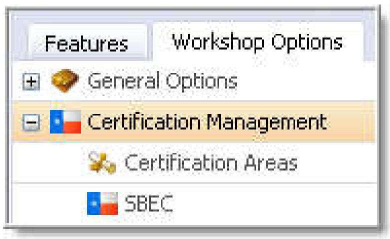
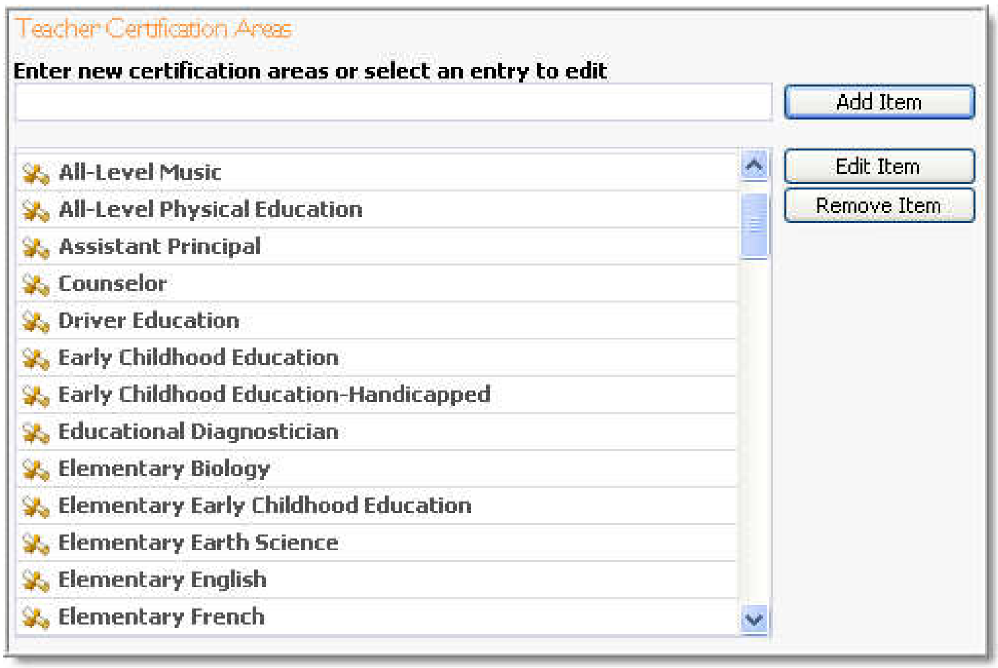
Certification Management



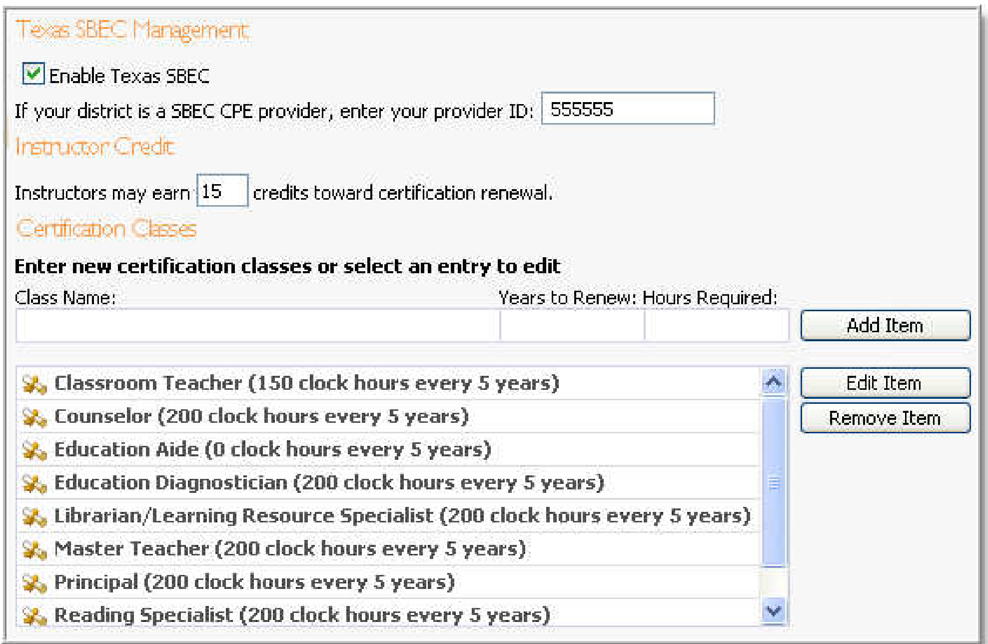
Certification Areas



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.

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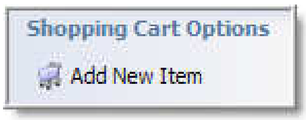
Shopping Cart

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.

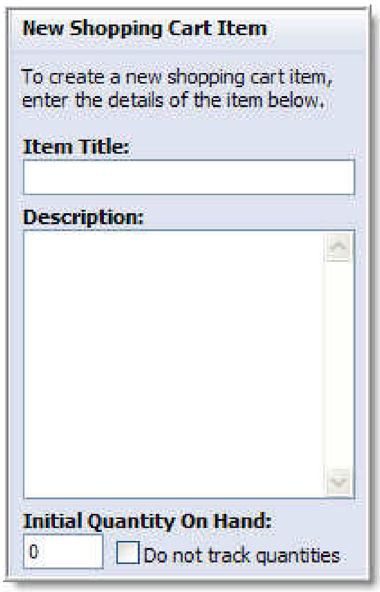
Add New Shopping Cart Items

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**.

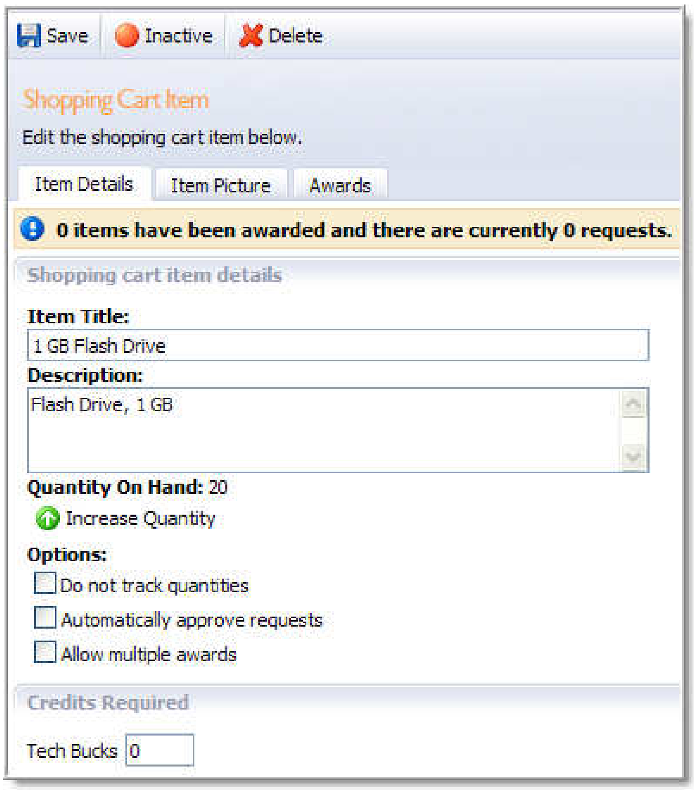
Repeat this process for all items in the Shopping Cart inventory.



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.



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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.

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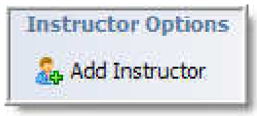
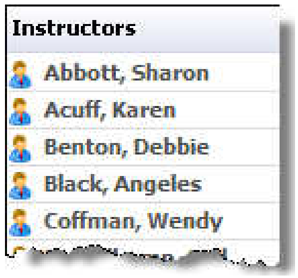
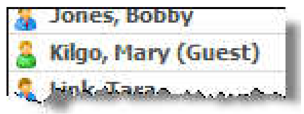
Instructors

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.

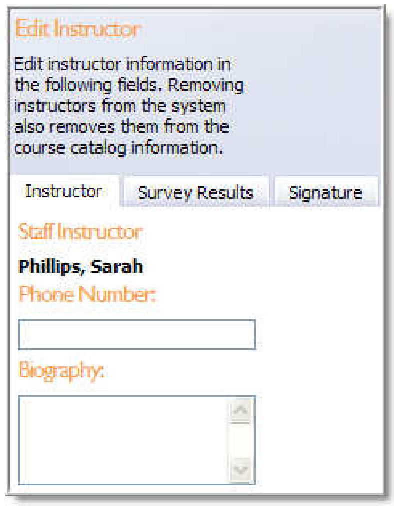




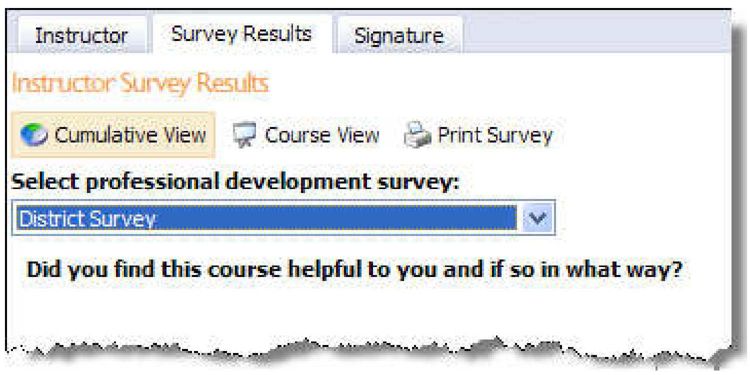


Edit Instructor

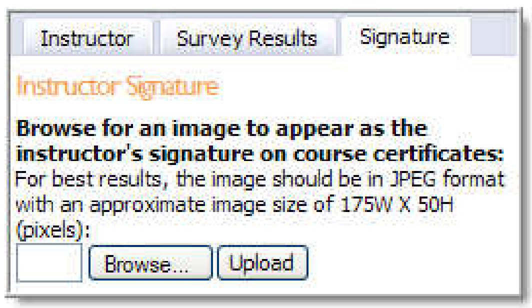
Instructor Tab: Update the phone number and biography for an instructor.



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.



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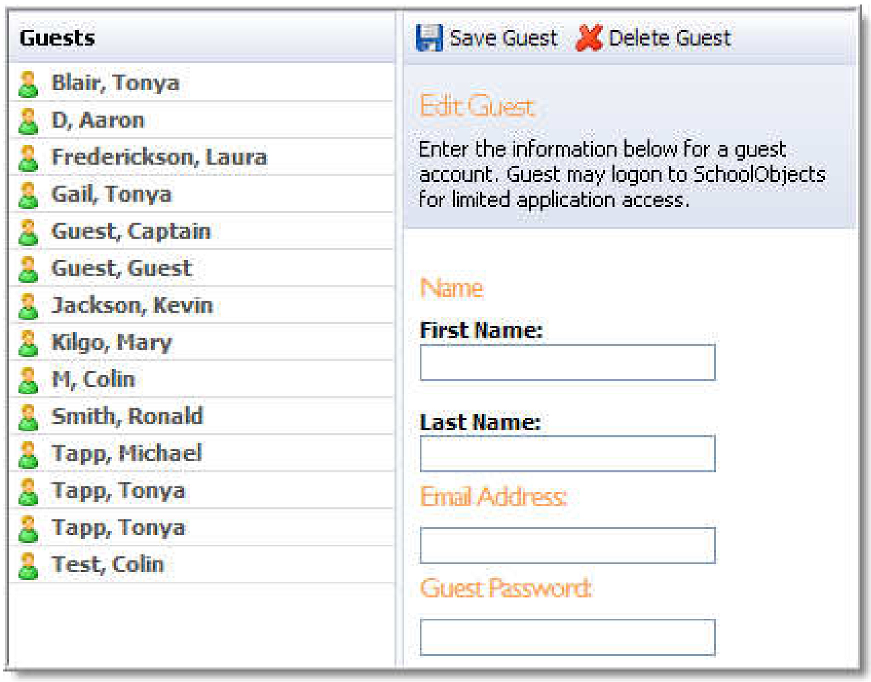
Guests

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.

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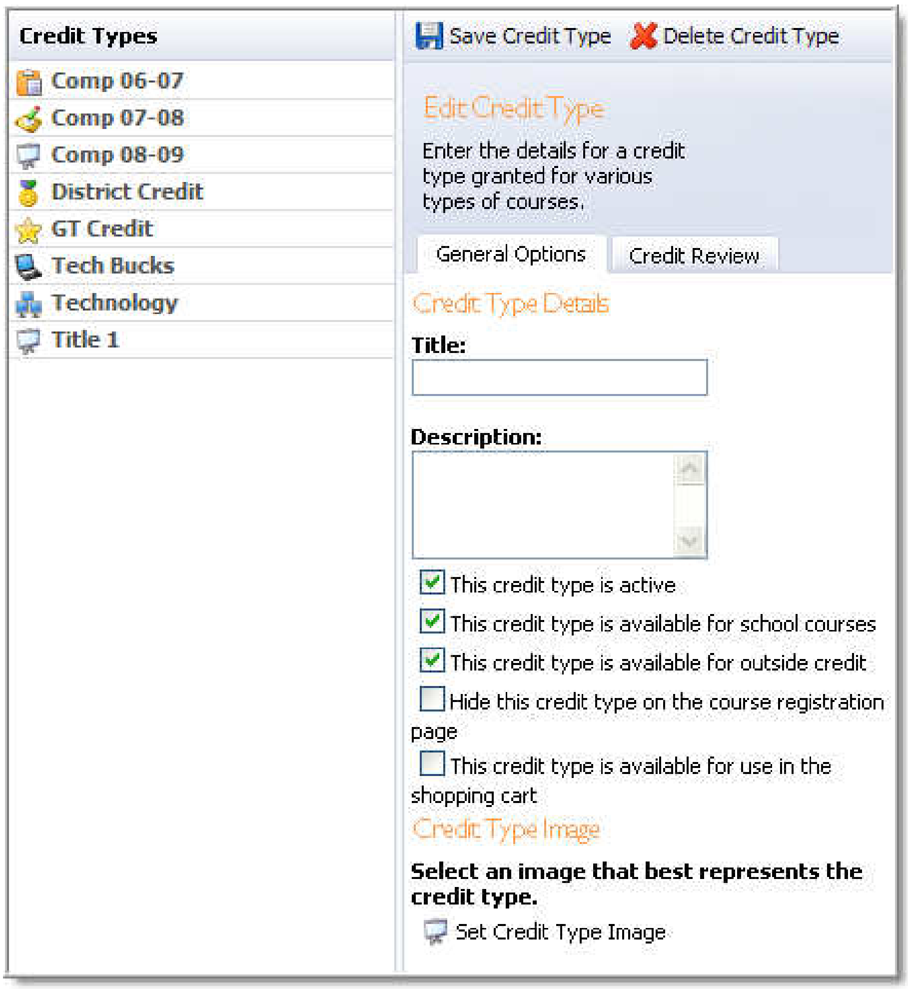
Credit Types

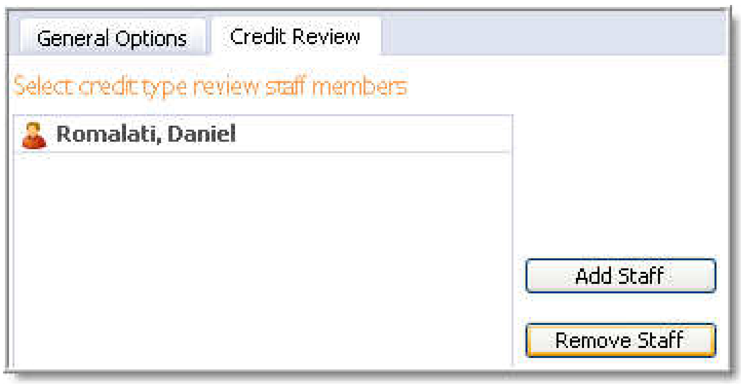
Create New Credit Type: Enter the details of the credit type under General Options, or select a specific credit type to edit the details.



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 credit type be 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.

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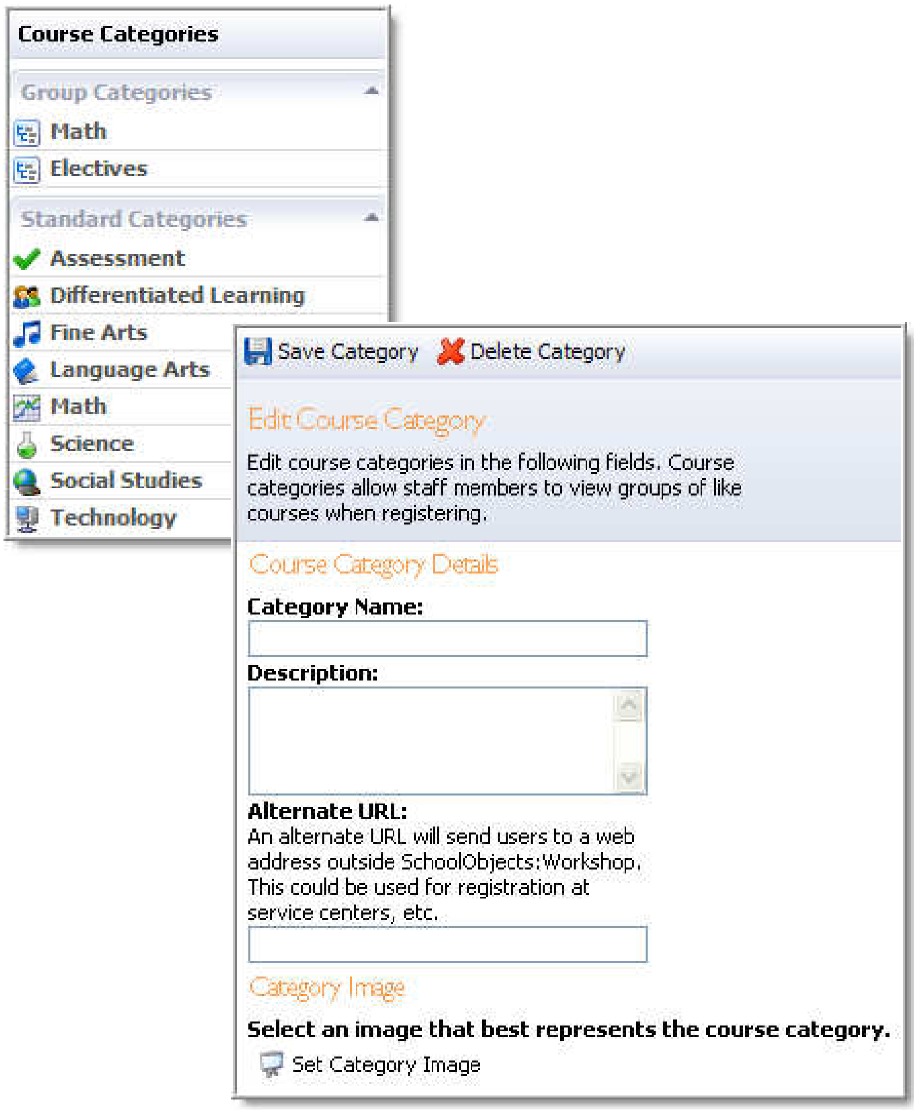
Course Categories

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

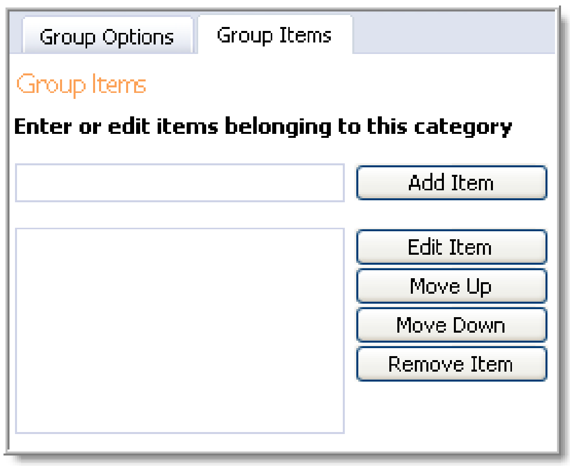


Standard Category: A single group of like courses

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.

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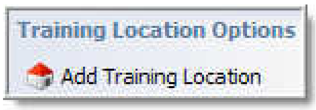
Training Locations



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.

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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:

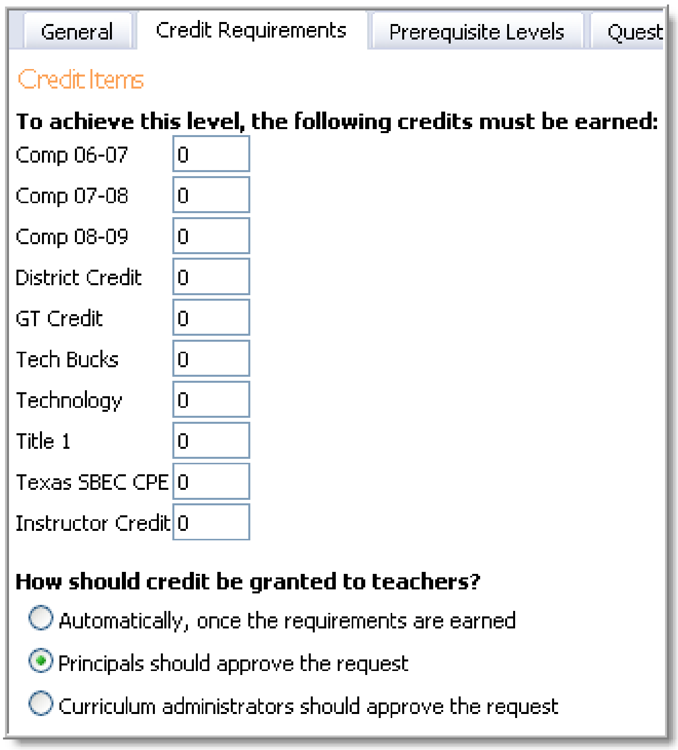
Type a Title, Description and select an image to best represent the PD level.

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



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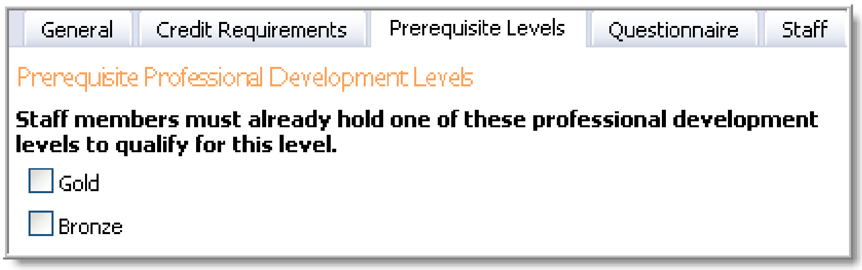
Prerequisite Levels Tab:

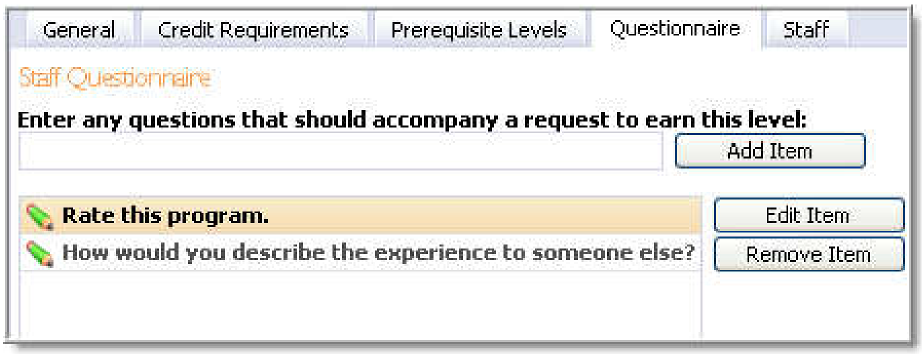
If staff members must complete one professional development level before completing another level, select the prerequisite level here.



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.

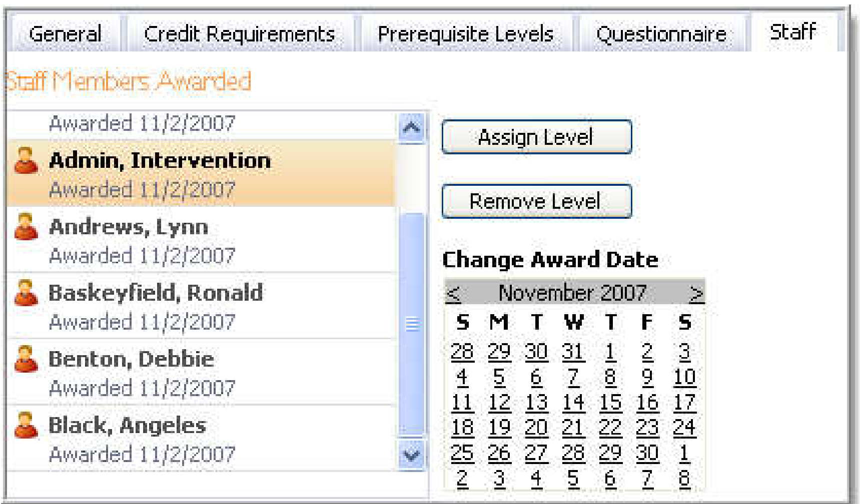


Staff Tab:

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.



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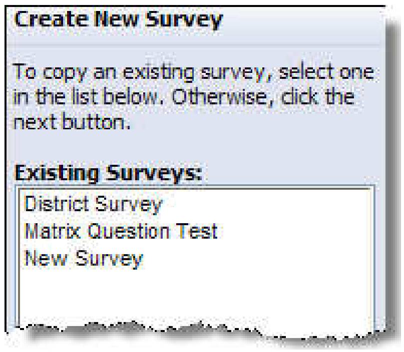
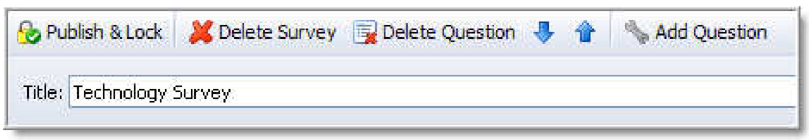
Course Surveys

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.

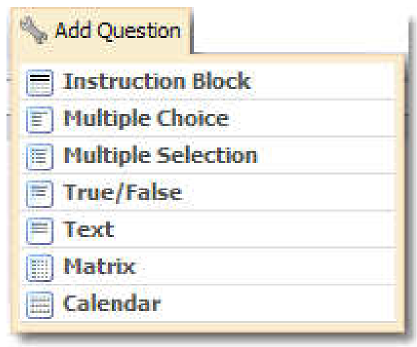
Add New Survey to create a new survey in Workshop. If surveys already exist, select one from the list to copy and then edit its contents.



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.

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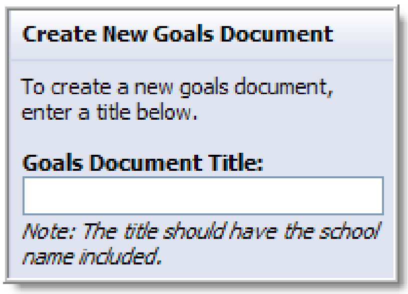
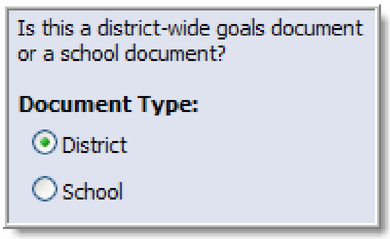
Goals

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.

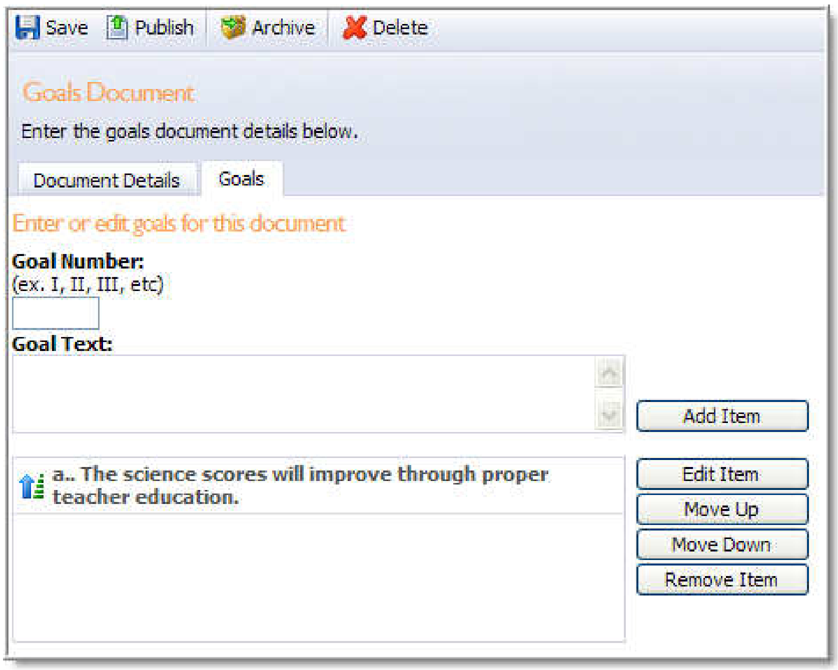


On the Goals Tab, enter the goal number and text. The goals can then be edited, moved, or removed.

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.

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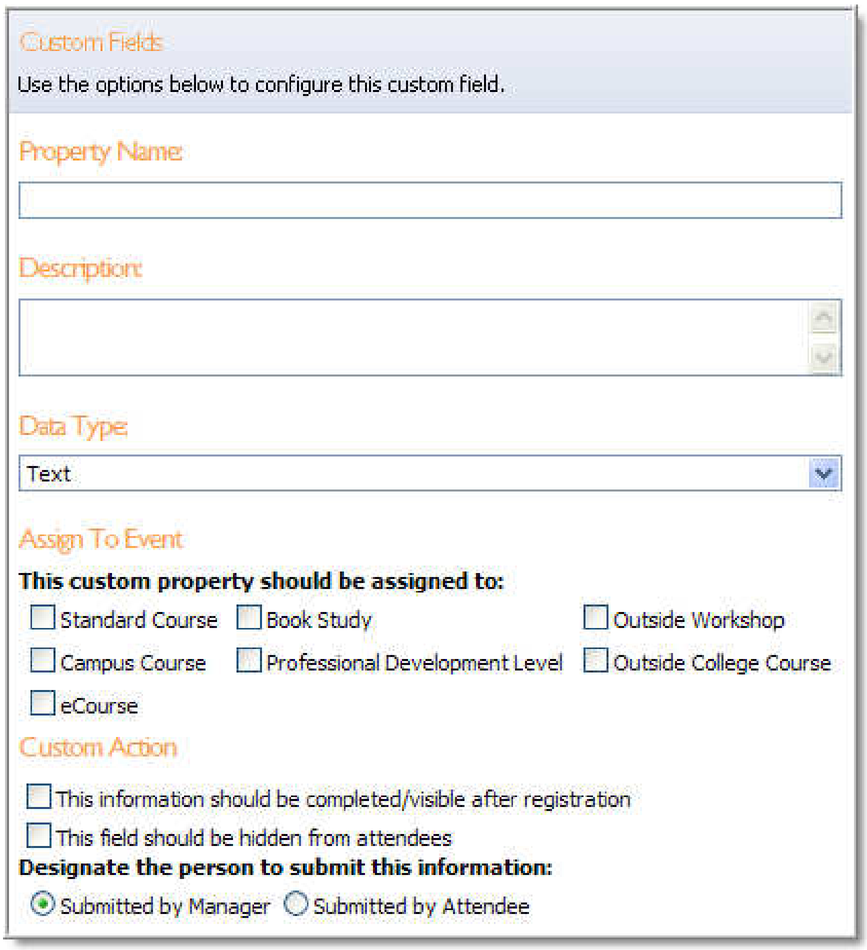
Custom Fields

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.

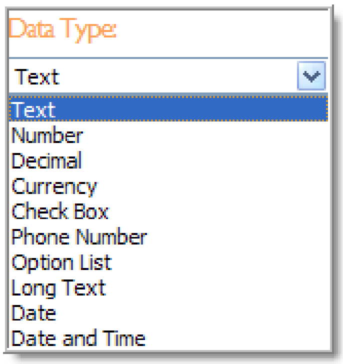
Complete the name and description of the field.



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.

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