

Intro

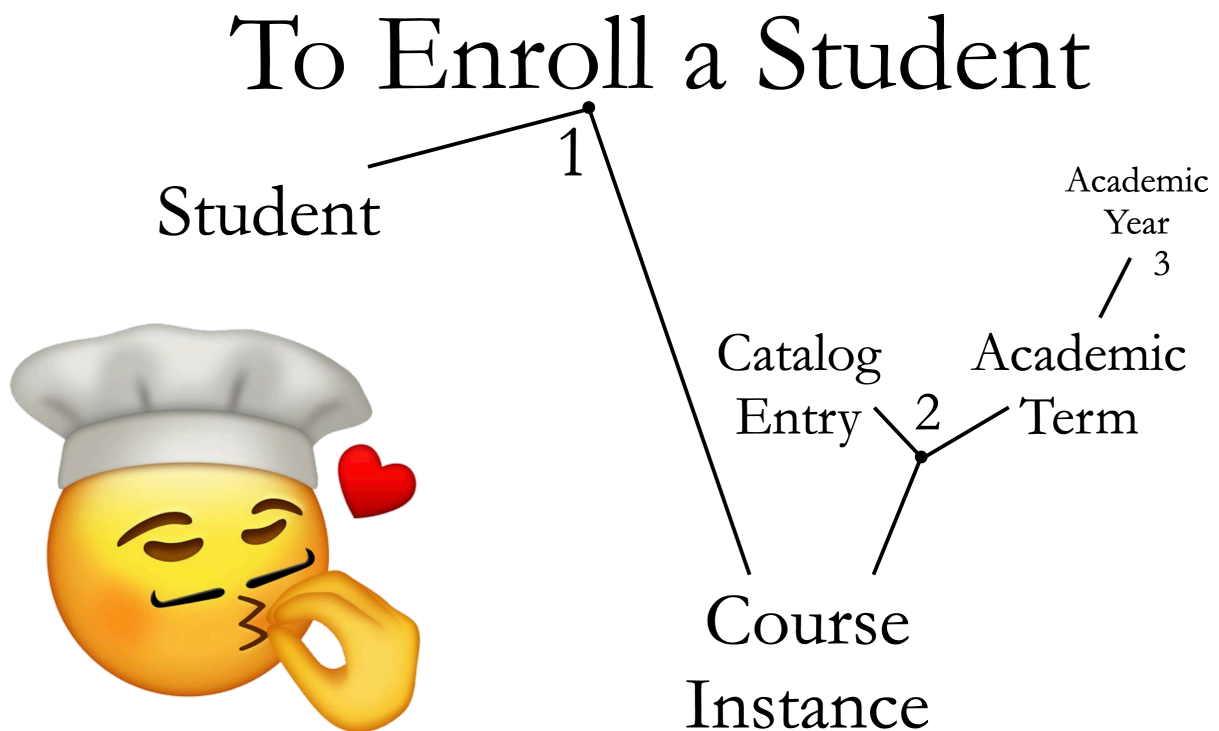
- Goal: Cover the setup required to Enroll Students in Courses
- Additional goal: explore trickier aspects of related setup

Roles

- Academic Admin required to create academic years and terms
- Academic Admin or Registrar required to create catalog entries and course

instances, and to manually enroll students

ORDER of OPERATIONS



Outline

- Create an Academic Year
 - Create an Academic Term
- Create a Course Catalog Entry
- Create a Course Instance
- Enroll the Student
 - Manual/Admin-Enrollment
 - Online/Self-Enrollment (requires students to have User Access — see *Appendix 1* for help granting access)

Fly-By (Individual Task Workflows)

- 1 - Create an Academic Year
 - Go to Academics >> Settings >> Academic Years
 - Click Add Academics Years
 - Enter Start and End Years
 - Save
- 2 - Create an Academic Term
 - On Academics >> Settings >> Academic Years . . .
 - Click on an Academic Year
 - Enter Start and End Dates for each term
 - Save
- 3 - Create a Course Catalog Entry

- Go to Academics >> Catalog Course
- Click "Add Course"
- Fill out basic course details
- Save Course (Name and Abbreviation required, Department

Recommended)

4 - Create a Course Instance

- Go to Academics >> Academic Term >> Courses
- Set term selector
- Click Add Course(s), then Add a Course
- Choose Department, choose Course
- Save

5 - Enroll the Student

• Manual/Admin-Enrollment

- Go to Instance >> Roster
- Enter student's name, select from results
- Save

• Online/Self-Enrollment

- Go to Academics >> Info >> Online Enrollment, click Edit
- Set Online Enrollment Start and End Dates
- Save

In Depth

- This set up divides into two categories
 - 1, basic technical steps, required
 - 2, optional steps to think through

Getting students into courses

1 - Requires . . .

- Academic Year / Academic Terms
- Course Catalog entries
- Create course instances
- Profiles with the active student role assigned
 - input manually / uploaded by institution / migrated in
- manually enrolling students or setting up self enrollment

2 - Probably/Optionally . . .

- Creating Program(s)
- Create Grade Scale(s)
- Creating Degree(s)
- Create Degree Audit

Academic Years and Terms

NAVIGATION

- Go to Academics >> Settings >> Academic Year, click Add Academic Year
 - Enter start and end year

- This creates the year, adds it to list of years
- Click in to the new year
- Primary function = you can add a new term
 - STATISTICS: One place to get term stats
 - CLOSURES: Manage school-wide closures affecting the academic year
 - Enter a closure to prevent courses from scheduling automatic class meeting on that date
 - TERMS: On the right, click "Add" to add a term
 - Enter a Name
 - This generates a Display Name that prefaces your term name with the academic year
 - Adjust the Display Name, if necessary
 - Set start and end dates
 - Set term to "Standard" or "Non-Standard"
 - Standard terms cannot overlap, Non-Standard terms can
- Disparate elements of Populi depend on terms:
 - Enrollment - control enrollment by term
 - Transcripts - list courses by term
 - Billing - charges trigger by term
 - Reporting - often dependent on terms
- Mostly just saying that enrollment is by term

- Other elements revolve around term enrollment
- Terms can be grouped with a special Populi feature to accommodate other requirements
- HOWEVER - based on experience, we recommend keeping your terms as simple as possible

Create Catalog Entry

- A catalog entry = an abstract version of a course
- students can't enroll in catalog entries
- catalog entries = basis for 1 course in multiple instances

Navigation

- To create catalog entries . . .
- Go to Academics >> Course Catalog
- In the upper left, click Add Course

Settings

- On a Catalog Entry, some fields = Controls, some fields = Templates
- CONTROL: functions controlled at the catalog entry level
- Self-Enrollment
- Retake Policy
- Program
- Department
- Remedial

- Status
- Tuition Schedules
- Abbreviations (sort of a Control field)
- TEMPLATE: fields serving as the basis for course settings
 - Not a true course template
 - Basic settings for an instance populated from the catalog entry

Control Field Descriptions

- DEPARTMENT:
 - Setting Department allows you to find it later, categorize it (you'll create all Departments custom — see *Appendix 2* for more)
- PROGRAMS:
 - Controls which Programs see this course
 - Automatically maps courses to student's program
 - Streamlines building a transcript
- RETAKES:
 - Can be either "count as earned credits" or "not count as earned credits"
 - "Not count as earned credits" means higher grade / newer instance overrides old instance
 - "Count as earned credits" means all instances grant credits
- FULFILLS PROGRAM REQUIREMENTS:

- Courses that shouldn't show on transcript or degree audit should "not fulfill program requirements"
- SELF-ENROLLMENT:
 - Allows students to enroll in courses on their profiles
 - "Show During Self-Registration" controls visibility
 - Controls students' ability to audit or enroll

Course Instances

- Course Instance = a content container in which a student can enroll or *be* enrolled

Navigation

- Go to Academics >> Academic Term >> Courses
- Select the correct term in the drop-down at the top
- On the right, click Add Courses

Setup

- "Department" drop-down lets us choose course's department
- Select the correct course from the course drop-down
- The automatic start/end dates conform to the term's, but can be edited
- If you have multiple campuses, select the Campus
- Choose to publish this course now, or publish it later
 - The Published setting controls what course students can see

- Enrolled students have full access to a published course within the student access dates.
- On unpublished courses they only see the course name, description, pass/fail status, credits/hours, faculty, and meeting times

Course not open to students

PHIL 101: Philosophy 101: What is a thought? is not available yet.

Course Description

Figuring out what a thing that happens in a brain is.

This course is worth **2 hours**.

Faculty [Micah Micawber](#) ★

Meeting Times

Tuesday 8:00am-9:00am
Room TBA

- Before a student enrolls, if they click into a course set to Published = No they'll see a card like this
- If that course is set to Published = Yes, they'll see a few more details:

PHIL 101: Philosophy 101: What is a thought?

Info		Meeting Times
Course Number	PHIL 101	Tuesday 8:00am-9:00am Room TBA
Term	2020-2021: Summer	
Dates	May 24, 2021 - Aug 1, 2021	
Units	Credits: 2.00 Hours: 2.00	

Faculty

[Micah Micawber](#) - Primary
Send Email

Description
Figuring out what a thing that happens in a brain is.

Syllabus
Lorem ipsum dolor
Sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute inure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.
Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

- Set up your meeting schedule now, or wait
- Once you have all of this set, you can click SAVE
- Now we've got a course in which we can enroll a student

Enrolling a Student

- Two primary ways of getting students into courses
 - 1. Manually enrolling them
 - Students without Populi access must be manually enrolled
 - Same, if you're building transcripts w/o migrating data
 - Some schools manage all enrollment manually
 - 2. Allowing students to Self-Enroll
 - set up online enrollment period for a term
 - students login and register for courses

MANUAL

- Two ways to do this
 - Working course by course from a roster, work from the course
 - Working student by student with transcripts, work from the student's profile

FROM THE COURSE

Navigation

- Use the Search field up here, input the course name, select the instance result
- Check for the correct term
- Go to Roster
- Click Add Students
- Choose Add Students by Name
- Input the name, select the correct result

- If you have a list of students, continue inputting them
- Save

FROM the STUDENTS' PROFILE

Navigation

- Go to the student's profile >> Student tab, over to the right where you'll see the Courses sill
- Click Edit
- In the resulting dialog, make sure that you're looking at the correct term - you can change the term by clicking these arrows
- Then type in the name of the course to search for it - when you get the correct course in the list of results, click it to select it
- You can set whatever details you need to right there
- Repeat this to add other courses for this term
- SAVE

SELF-ENROLLMENT

- Now we look at setting up online enrollment for a term, and then at how students register for courses

Navigation

- You'll manage Online enrollment by going to . . .
 - Academics >> Academic Term >> Info
 - Check the term selector for correct term

- Under the sill for "Online Enrollment" - click Edit
- Input the start date - when students can start enrolling
- End date and time are already supplied
 - Standard end date for online enrollment is the term's add/drop date
 - Editable if enrollment end date is other than add/drop
- Other Features
 - You can open enrollment by **standing** or some other **tag** - some schools open enrollment for upperclassmen first
 - We have some additional advanced features here (for more see *Appendix 3*)

STUDENT PERSPECTIVE

Navigation

- While registration's open for at least one course that matches their Program, when a student logs in they'll see a notification on Home >> Dashboard
 - they can click to be taken to their Registration tab
- OR
- A student can navigate to their Registration tab themselves
 - They can click My Profile >> Registration
 - Once they're on their Registration tab . . .
 - They'll see the courses in which they could enroll
 - Those courses need several things to line up

- Programs: Student needs an active program that matches a program on the catalog entry
- Campus: If you have more than one Campus, student must have a campus that matches the campus on the instance
- Self-Enroll: Self-Enroll must be Yes on catalog entry
- Max Enrolled: must allow at least 1 student to enroll
- Students click a course's plus sign, get a dialog, then click ADD
- Students add other courses, save their registration.
- Then they'll be enrolled in those courses
 - You *do* have the option of inputting an Enrollment Agreement (see *Appendix 4*)
 - automatically makes a document with charges for this student's enrollment — they digitally sign
 - Typically happens when they click Save, depending on your settings

Other Things

- A few things it would be nice to set up, but aren't strictly necessary
- *Creating Program(s)* - so courses map to the program properly, saves time populating transcripts (see *Appendix 5*)
- *Create Grade Scale(s)* - so students will have course grades (see *Appendix 6*)
- *Creating Degree(s)* - influences which courses students take (see *Appendix 7*)

- *Create Degree Audit* - students see the courses required for their degree (see *Appendix 8*)

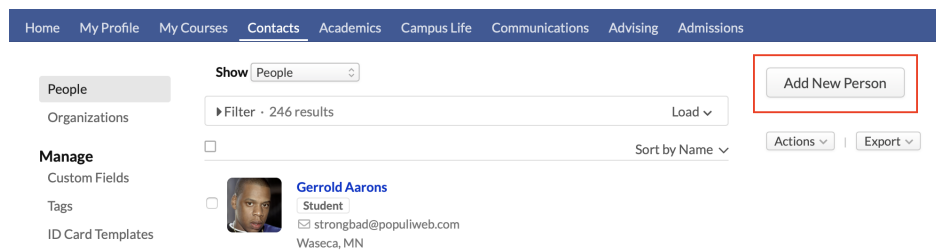
APPENDIX 1

Create a student, grant user access

Students may come into Populi via the data migration, or through Populi's Admissions process, uploaded in batches, or perhaps with your institution entering them by hand.

If you're entering students by hand . . .

- Go to Contacts >> People:
 - You click **Add new person**. This article covers this option.



If you're adding a new person who will be a user, here's the best workflow:

1. Follow the instructions in this article to add the person.
2. Grant the person the appropriate [user roles](#).
3. Give the person a [user account](#).

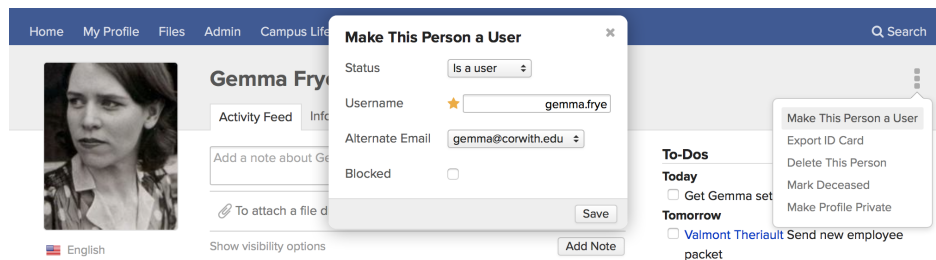
Adding a new person

1. Go to Contacts >> People.
2. Click Add new person.
3. Enter the person's name. At minimum, you need to enter a first and last name to create a new person in Populi. You can either use the super-simple name field,

or click *Want more fields?* to enter each part of the person's name field-by-field (prefix, first, middle, etc.). See *Names*, below, for more details.

4. Enter any other basic information you have—gender, address, [user roles](#), [tags](#), [ID photo](#)...
5. When you're done, click **Add Person**.

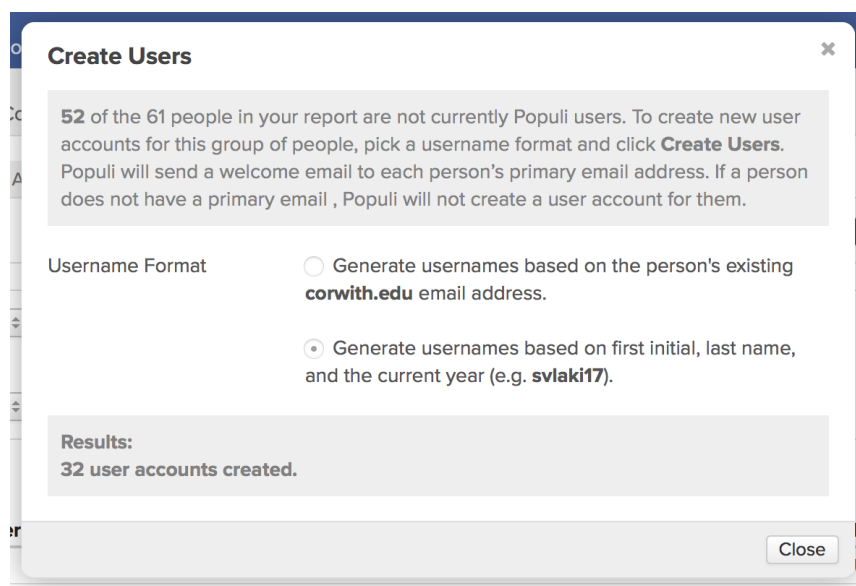
To grant user access to an individual



1. Go to her profile and check her user status to the right of her name in the gray bar. If she's a user, you'll see a notice saying *Active User*. If not, click the menu button and select *Make this person a user*.
2. Select *Is a user* from the status drop-down.
3. Populi automatically generates a username/email with her first initial, last name, and the last two digits of the current year. Keep this username, or enter another username.
4. Choose an alternate email. The *Welcome* email will be sent to this address. If you don't have any email addresses entered for her yet, close the dialog box, enter an email address under contact info, then go back to Step 1.
5. Click **Save**.

To grant access to a group of students, start by going to Academics >> Reporting

>> Data Slicer



To use this option, you must be a Populi Account Administrator for your school.

1. [Run a report](#) or load an existing report. The report will return a list of people with the Student role who fit your filter conditions.

- After running your report, click **Columns** and add a column that shows *Primary Email*. If a student doesn't have a primary email address, she cannot be given a user account; including this column will help you find students who won't receive an account for this reason.

Click **Actions** and select *Create users*.

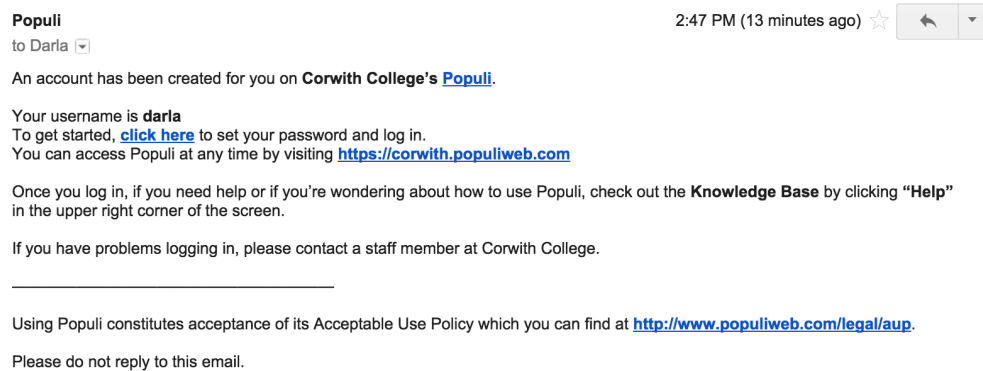
Review the items mentioned in the dialog. If your report returns people who already have user accounts, they will be skipped.

Choose the username format. You cannot choose the *email address* option if your students are not given school email addresses.

When you're ready, click **Create Users**.

After creating the users, you'll see the results. This operation skips students who already have user accounts or who do not have primary email addresses.

The new user gets a welcome email



Populi sends her a welcome email. This email contains a link to set her Populi password and log in for the first time. She'll need to log in within seven calendar days of receiving the email. After that, the link expires, and you'll need to send her a [password reset email](#).

She's now a full-fledged Populi user

She can now log in and make changes to Populi appropriate to the roles you gave her.

APPENDIX 2

Create Departments

1 - Go to Academics >> Settings >> Departments

2 - Enter the name of the department

3 - Save

APPENDIX 3

Advanced Options for Online Enrollment Settings

– Advanced options for online enrollment let you introduce a delay and/or "lottery" for student registrations.

2. In the Edit online enrollment dialog, click show advanced options.
3. To delay registration processing, select starting at next to Process Registrations. Enter the date/time at which you wish to process registrations.
4. To introduce a registration lottery, in which registration order is randomized, enter the number of minutes over which you wish to spread the processing order (the example below will explain this...).
5. After saving, you should consider editing the Registration processing message setting in Academics > Settings.

Let's say you decide to process all Fall Term registrations at noon on May 30th together with a 10-minute lottery:

1. 300 students register between May 20 – 29. When they submit their registrations, they see something like this.
2. During the wait, students will not be able to submit any further registration changes.
3. At 12:00PM, May 30th, Populi begins processing the 300 registration submissions. Over the course of the 10-minute lottery, it randomly selects one of

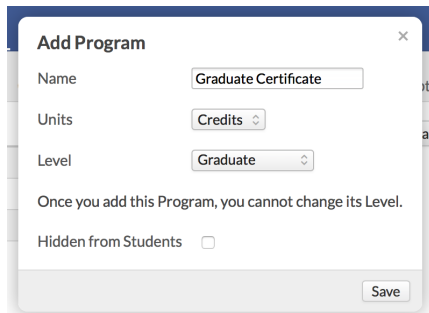
the registrations and sorts out whether the student's registrations for individual classes are granted. It considers things like enrollment/auditor limits, waiting lists, and so on.

4. After processing an individual student's registration:

- The student's registration view updates.
 - Populi emails the student with the results of the registration.
 - At this time, the student can go back to the Registration view and see about making changes.
-
- The delay and lottery also apply to others using the Registration view—for example, Advisors, Registrars, and Academic Admins who enroll students with a registration lock. These users can circumvent the delay/lottery by enrolling students on the Profile > Student view or on Course > Roster.

APPENDIX 4

Creating Programs



Add Program [X]

Name

Units

Level

Once you add this Program, you cannot change its Level.

Hidden from Students

Save

To add a new program...

1. Go to Academics > Programs.
2. Click Add a program.
3. Give the program a name.
4. Select what kind of units this program will use: *Credits* or *Hours*.
5. Select the program's level: *Graduate* or *Undergraduate*. Once you add the program, you cannot change the level, so make sure you get this right!
6. Click **Save** to create the program.

Appendix 5

Creating a Grade Scale

Navigation:

Academics >> Settings >> Grades & Attendance

The grade scale defines your letter and number grades, their effect on Grade Points (and, therefore, GPAs), and which grade(s) constitute a course failure.

Grade Scale Cancel Save

Choose a year or term

Letter	Minimum Points	Direct Equivalent	Grade Points	Fail	Delete
A+	97.00	98.50	4.00	<input type="checkbox"/>	
A	94.00	95.50	4.00	<input type="checkbox"/>	
A-	90.00	92.00	3.75	<input type="checkbox"/>	
B+	87.00	88.50	3.50	<input type="checkbox"/>	
B	84.00	85.50	3.00	<input type="checkbox"/>	
B-	80.00	82.00	2.75	<input type="checkbox"/>	
C+	77.00	78.50	2.50	<input type="checkbox"/>	
C	74.00	75.50	2.00	<input type="checkbox"/>	
C-	70.00	72.00	1.75	<input type="checkbox"/>	
D	67.00	68.50	1.70	<input type="checkbox"/>	
F	0.00	0.00	0.00	<input checked="" type="checkbox"/>	

- Letter indicates letter grade the student receives—on everything from assignments to transcript.
- Minimum points shows the minimum number grade (on a 100-point scale) required to get the letter grade. Anything below that number will receive the next appropriate lower Letter. In the above example, any number grade between 90 and 93.99 would get an A—.
- Direct equivalent shows the number grade entered on the student's record if their instructor simply gives them a Letter grade (as opposed to a number grade

that gets converted to a number). Typically, this number is the median of the Minimum Points from one Letter Grade to the next highest.

- Grade points shows the value of the letter grade in GPA calculations.
- Fail indicates whether the grade is recorded as a failing grade. Failing students will not earn any credit for that course.

Adding and editing grade scales

Grade scales can be connected to academic years and terms. Whenever you need to, you can add a new grade scale without affecting historic academic data.

1. Click **add** to create a grade scale, or **edit** to modify an existing grade scale.
2. Select an academic year or term.
 - If you select an academic year, the grade scale will go into effect as of the first term of that year.
 - If you select an academic term, the grade scale will *only* affect students and courses in that term.

Change the letter grades using the drop-downs. Change the points by editing the numbers.

Check the fail column where appropriate.

Click add a grade to create a new letter grade row, and modify it as needed.

Click the trash can icon to delete a letter grade row.

When you're finished, click **Save**.

You can also specify grade scales for individual [Programs](#).

Appendix 6

Creating Degrees

Degrees are created and managed in Academics > Degrees.

The screenshot shows a form titled "Add New Degree" with the following fields and values:

- Name: Bachelor of Arts in Liberal Arts
- Abbreviation: B.A.
- Description: Bachelor of Arts in Liberal Arts, general studies, classics, and humanities.
- Program: Undergraduate
- Department: Undergraduate
- Length: 4 Years
- Level: Bachelor's
- CIP Code: 24.0199: Liberal Arts and Sciences, General
- Distance Education:
- Diploma:

An "Add Degree" button is located at the bottom right of the form.

1. Click **Add Degree**.
2. **Name and abbreviation:** Bachelor of Arts, B.A., and so on. Don't include majors and minors—those are considered [specializations](#).
3. **Description:** What's the degree for? What are the basic requirements? Just sketch it out (this field is optional).
4. **Program:** What [Program](#) does this Degree fall under?
5. **Department:** The Department responsible for the Degree.
6. **Length:** How long does it typically take for a student to earn this degree? This field helps supply data to various reports (Clearinghouse, Academic Progress, and more).
7. **Level:** Whether the Degree is an Associate's, Bachelor's, Master's, and so on. Your options here are determined by the level of the program chosen in step 4

and conform to those defined by the U.S. Department of Education's [IPEDS](#) program.

8. **CIP Code:** A standard numerical code for a post-secondary course of study, developed and defined by the [U.S. Department of Education's National Center for Education Statistics](#).

9. **Distance Education:** Check if students have the option to complete this degree entirely via distance education.

10. **Diploma:** Check if this degree nets the student a diploma.

After creating the degree, click its name to go to its page. Here, you can...

- Set up specializations (see below).
- Add general and course [requirements](#).
- Set the degree's status.

Degree status

The image shows a screenshot of a web interface. On the left, there are three vertical labels: 'Program', 'Status', and 'Department'. To the right of these labels is a dropdown menu. The dropdown menu is currently open, showing a list of options: 'Construction', 'Active' (which has a checkmark next to it), 'Retired', and 'Art'. The background of the page is slightly blurred, showing a form with a vertical scrollbar on the right side.

After you create the degree and finish adding requirements and specializations, you'll be able to change its status. All degrees start out under *Construction*.

- **Construction:** The degree is still being defined and is not yet available to students.
- **Active:** The degree is currently being offered to students.

- **Retired:** The degree is no longer offered to new students. Current students may still be pursuing it, but once they're done, it is simply kept around for historical records.

Specializations

The screenshot shows a web form titled "Add Specialization". The form has the following fields and values:

- Name:** American Literature
- Abbreviation:** Am. Lit.
- Description:** Senior emphasis on American Literature.
- Type:** A dropdown menu is open, showing options: Major, Minor, Concentration, Emphasis, and Other.
- Department:** Undergraduate
- CIP Code:** 05.0102: American/United States Studies/C

A "Save" button is located at the bottom right of the form.

Each degree can have multiple specializations. Specializations can only be associated with one degree.

1. On the degree's page, click **add** next to *Specializations*.
2. Give it a name, abbreviation, and description.
3. Select the type—major, minor, emphasis, etc.
4. Select the department and choose an optional CIP code.
5. When you're done, click **Save**.

Now that you've created this specialization, you can go to its page to...

- Add requirements to it.
- Change its status to *active*.

Appendix 7

Info on Degree Audits

Degree Audits are a much bigger subject to tackle than some of these other items. You may require more instruction than we provide here.

Degree Audits allow you to create groups of courses that can be attached to a degree with certain requirements.

For example: you have a set of courses like "First Year Core" and require students to take six courses from that group. The degree audit shows a student courses they've already completed, and those still available to complete, in order to meet requirements.

Degree Audits Require

1 - Degrees

2 - Course groups that define the courses that could be used to meet degree requirements

3 - Setting requirements for those course groups on the degree

Workflows

Create a Course Group containing required courses

1 - Go to Academics >> Course Group.

2 - Click Add Course Group.

3 - Input the group's Name.

4 - Set first year in which Course Group applies.

5 – Set the courses in the group by choosing a Department, clicking on the appropriate courses under Available Courses so they move to Selected Courses, selecting the next Department and so on.

6 – Save

Set first Requirement Year

1 – Go to the degree's page.

2 – Check to see if the requirement year you want to work with is already entered by clicking the drop-down.

- Requirement years are the same as academic years.

- A student who begins pursuing a degree in, for example, the 2017–2018 academic year will be held to the requirements you establish for the 2017–2018 requirement year.

- If the year already exists, select it from the drop-down and click edit next to Requirements. Skip the next two steps.

- If the year does not exist, click Add requirement year.

- Select an academic year from the drop-down. This will be the requirement year.

3 – Cumulative GPA: Enter the minimum cumulative GPA a student must achieve to earn this degree. This GPA excludes any transferred GPA.

4 – Overall GPA: Enter the minimum overall GPA required; this GPA includes any transferred GPA.

5 – Cumulative units: Enter the minimum number of cumulative credits or hours a student must pass to earn this degree. This amount includes transfer units!

Add Course Groups with Requirements to Degree

1 – Go to Academics >> Degrees, select a degree.

2 – On the right, on the Requirement Year drop-down, make sure you're editing the correct Requirement Year.

3 – In the center of the page, on the line for Course Groups, click Add.

4 – Select the Course Group.

5 – Set the Requirement Type – “Units” if you're requiring X number of Credits or Hours.

6 – Set the Requirement Value – if you have a Course Group of three courses and you're requiring all three courses, you would set this value to 3.

7 – (Optional) Set the GPA Required – enter a minimum GPA for this course group. The Degree Audit will calculate the cumulative GPA for the courses in this group; students must meet or exceed it to pass the requirement.

8 – (Optional) Set the Minimum Course Grade – Enter a minimum course grade for this course group. Grade is reckoned in terms of grade points from the student/

course's grade scale. If your grade scale says $C = 2.0$, and you'd like to require a minimum grade of C, then enter 2.0 in this field.

9 - Allow Equivalencies - if you'd like to allow courses that are set as equivalent to other courses to fulfill these requirements, check this box.

10 - Restrict Courses - If you'd like courses applied against this group to only apply against this course group, check this box.

NOTE: When you're initially creating the Course Group and choosing the first year for the course group, enter the first year that this requirement will affect students pursuing a degree.

Often a particular set of requirements has changed over time — required courses have been removed from the group or added to it. You'll be able to edit the requirements for each year in which the list of courses changed. So if your list in 2011-2012 was . . .

ENG 101

HIS 101

SCI 101

. . . but you changed the required courses in 2013-2014 to . . .

ENG 101

HIS 101

MTH 101

... you'll be able to indicate that within your course group.

Again, as you're creating these, you'd want to start with the farthest past year for which you'd want to show a degree audit. Then you would move forward in time editing the course group in each year the requirements changed.