Coursedog Reference Guide
For Divisional Administrators

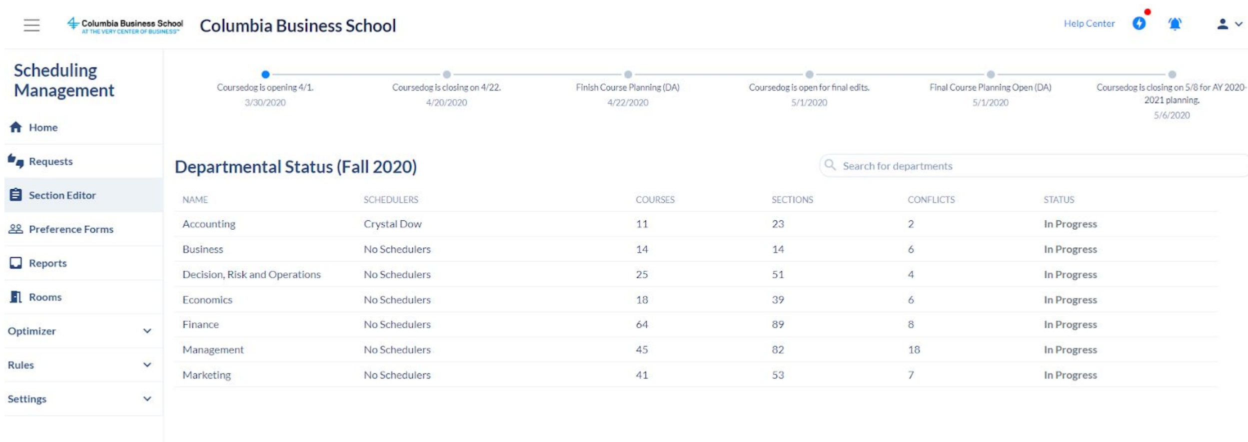
Access & Login

- Coursedog works with most browsers, but Google Chrome is recommended.
- Log into Coursedog at courseplanning.gsb.columbia.edu with your GSB email address. You will be redirected to your institution's login page where you can log in with your Columbia Business School credentials.

Homepage & Dashboard

- After logging into Coursedog you will be directed to the homepage (pictured below). To navigate within the platform use the Dashboard on the left to navigate between **Home**, the **Section Editor**, **Preference Forms**, **Requests**, **Rooms**, and **Reports**.

- Regardless of your location in the platform, you can select the three parallel lines in the upper-left corner to expand the Dashboard, or the CBS logo, to return to the home page



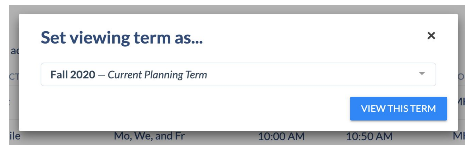
Additional Homepage Features (found on the top right corner of the screen)

- **Help Center** - *Coursedog 'How-Tos' and Help Documentation* - See *Freshdesk* below for more information on the Coursedog Help Center.
- **Lighting Bolt** - *Recent Product Updates* - A red 'dot' indicates that new updates have been added to the product since you were previously in the platform.
- **Notifications** - *Relevant Messages* - Look here for a holistic view of messages on the status of change requests, schedule workflow, etc.,
- **User** - *Account Information* - Navigate here to view your Account Settings (this is helpful if you want to change your name or password), view your Feature Requests (See *Canny* below for more information on submitting product feature requests), or Log Out.
- **Timeline** - This timeline contains key dates for the current planning term.
- **Departmental Status** - This section of the homepage provides a high-level overview of Divisions and the associated courses, sections, conflicts, and status.

Section Editor

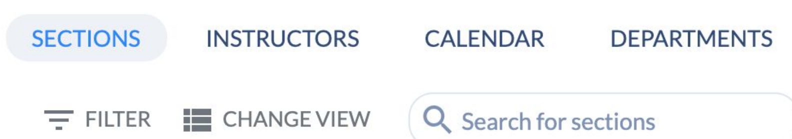
In Coursedog the Section Editor is where planning takes place, and where you will spend most of your time in the platform. The Section Editor can be navigated through the Dashboard and presents the user with a list of each course a Division is offering in a given semester.

Information on Interface

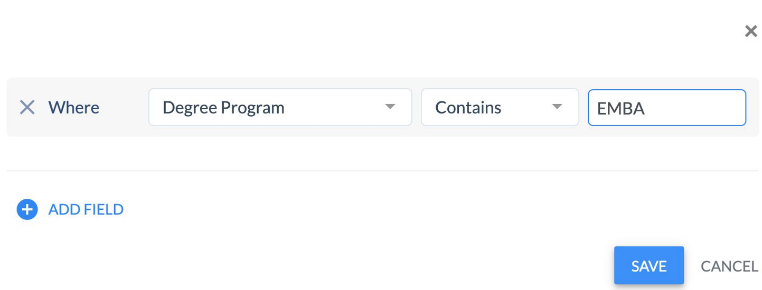


- **Semester/Term**
  - The Section Editor defaults to the current first term of the upcoming academic year, Fall 2020. If you would like to view a different semester you can navigate to one by selecting the term name, and then selecting a different term name from the drop-down. Note that you will have to navigate to Fall 2020, Spring 2021, and Summer 2021 for this iteration of planning.
  - Each term has all of the course and section information from the most previous like term, i.e., Fall 2020 is a copy of Fall 2019 data (with the exception of time and room assignments).
  - Note that you can view historical data back to Fall 2014 with the exception of Summer 2020.

- **Navigation, Search, Filter, and View**



  - **Sections**- view course information and sections, edit sections, determine which sections and courses to offer
  - **Instructors**- view instructor profiles
  - **Calendar**- (not relevant for course planning)
  - **Departments**- view divisions
  - **Filter**- selectively view section by applying customizable parameters



- **Change View**- view by sections or view another term
- **Search**- search for courses, sections, or instructors (note that to search for instructors you must be on the 'instructors' tab)

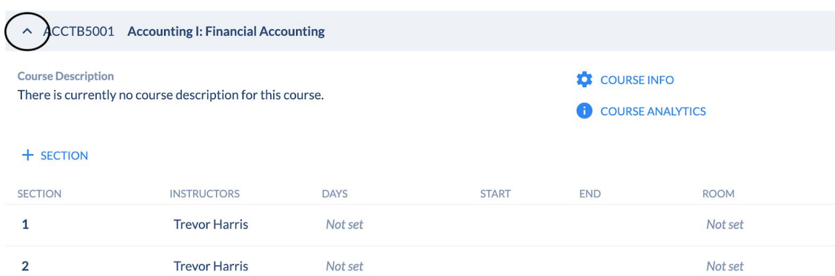
Planning Instructions

- **Term Select**
  - Select the term you want to plan for following the above instructions (Fall 2020, Spring 2021, or Summer 2021).
- **Division Select**
  - Navigate to Departments and select the relevant Division
- **Planning Rolled Over Schedule - *Access Opens April 1st***
  - The default view, **View By Courses**, provides a list of all courses and sections rolled over from the previous like semester.
  - Review each course to determine whether or not it should be offered in the relevant planning term.

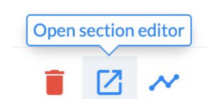
To Offer a Rolled Over Course

If you want to offer a course that was rolled over, follow the below steps:

- Select the **Arrow** to the left of the **Course Name** in order to expand the course information, so that you can see the Course Description, Linked Sections, and Course Information.



- To **keep a section**, hover over the section's section number and click the middle blue icon that appears in order to open the section editor modal.

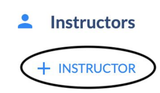


- Review all completed fields in the section editor modal and ensure they are **correct**. If the field is incorrect and editable, update the field. If the field is incorrect and uneditable, see *Submit Section Change Requests* below.
- Review all incomplete fields in the section editor modal. If they are required, update the field. If they are not required, update if you have the necessary information to do so.
- All sections should have the following fields completed: Section Number, Part of Term, Enrollment Capacity, Consent, and Section Status. Note that you will be unable to 'Save' the section without these fields completed.

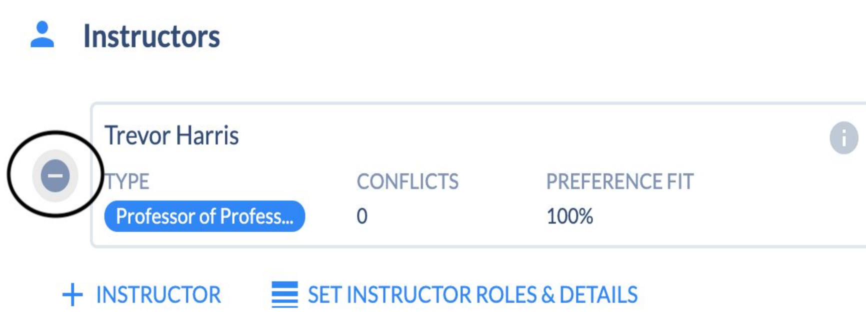
  See Below for a Description of Each Field
  - **General information**
    - **Section Number**- Unique identifier for each section under a course. Often this will be sequential, i.e., 1, 2, 3. Section number will be automatically created when a new section is

created. For MS and EMBA you may need to manually update the section (e.g. section 60, 100, etc.).

    - **Method of Instruction**- Is the class taught in an in-person, online, or hybrid format?
    - **Section Type**- Is the class a Seminar, Lecture, NYC Immersion or GIP class?
    - **Part of Term**- What portion of the semester is the section offered?
    - **Section Attributes**- Is the section a Core or Elective class?
    - **Cross-Registration**- If seats are available after bidding, are students from other schools allowed to cross register into this course?
    - **Centers and Programs**- Populated if a Center or Program has oversight over the course.
    - **Degree Program**- MBA, EMBA, MS, PhD, MS&E
    - **Format**- This will only populate for EMBA courses.
    - **Menu**- This will only populate for EMBA courses.
- **Meeting Patterns & Rooms**
    - This is not relevant for planning. Do *not* add a meeting pattern or room to the section.
- **Instructors**
    - To add an instructor select **+Instructor**



        - Here you can see all instructors within your division, with additional filters and a search feature, allowing you to sort through the instructors efficiently. If you toggle **Instructors From (X) Department** to off you will additionally be able to see instructors from outside of your Division.
        - After selecting an instructor or multiple instructors, select **Set Instructor Roles & Details** to indicate whether they are the Primary, Team, Supervisor, Teaching Assistant (TA), or Grade Assistant.
    - To remove an instructor, select:



- **Relationships**

- **Linked Sections** - for defining time relationships between sections.
- **Cross Enrolled Sections** - for identifying sections that require simultaneous registration.

- **Credits**
  - **Credit Hours**- the number of student credits attached to the course.
  - **Billing Credits**- the number of teaching credits attached to the course. Note this field will be red if value is not a whole number, but this is *okay.*
- **Enrollment Settings**
  - **Enrollment Capacity**- the maximum capacity for the section
    - For courses that are brand new, the capacity should be set to 50 students, unless otherwise approved.
    - For courses that have been rolled over from the previous year, the capacity will be pre-populated and you only need to change it if approval to change the cap was granted.
    - For courses that you are adding another section to an already existing course, copy that capacity over.
  - The questions below are optional and should only be filled out if you are reserving seats for another program.
    - **How many seats are needed for MBA Students**- indicate the number of seats that should be held for MBA Students, if any (optional if you are reserving seats for another program).
    - **How many seats are needed for EMBA Students**- indicate the number of seats that should be held for EMBA Students, if any.
    - **How many seats are needed for MS Students**- indicate the number of seats that should be held for MS Students, if any.
      - For MS Student seats, please also answer the following: Which MS program are these seats for? If more than one, select them and write how they should be split in the note section below.
    - **How many seats are needed for PhD Students**- indicate the number of seats that should be held for PhD Students, if any.
- **Other Settings**
  - **Consent**- indicate if the section is Application Only, Biddable, or Pre-Enrolled.
    - Pre-Enrolled courses include all core courses and any courses that students are enrolled into and do not have to bid or apply for.
  - **Status**- if the above fields are accurate, select **Active** to offer the section.

- **Tentative Courses: Is this course offering tentative?-** only select if you are not sure if the course will be offered this year.
    - **Why is this course offering tentative?-** only select if the course and whether the course or instructor are tentative.

- **Notes**
    - Capture any additional notes in this field.
- When complete click **Save Section**

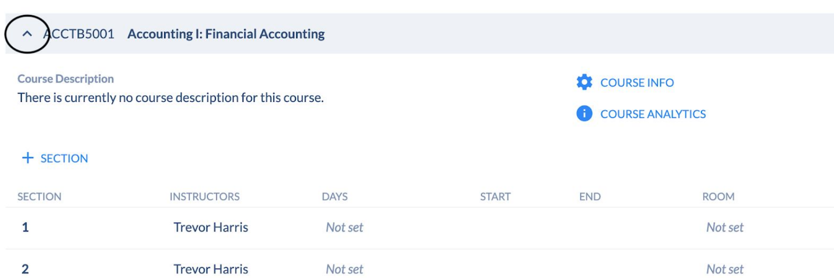
- To **delete** a section, hover over the section's section number and click the trash can that appears.

- To **add** a section, select **+Section**
    - Follow the above steps to complete the necessary fields.
    - If Section Attributes, Centers and Programs, and Billing Hours is not populated that is *okay*, Coursedog Administrators will complete this field.

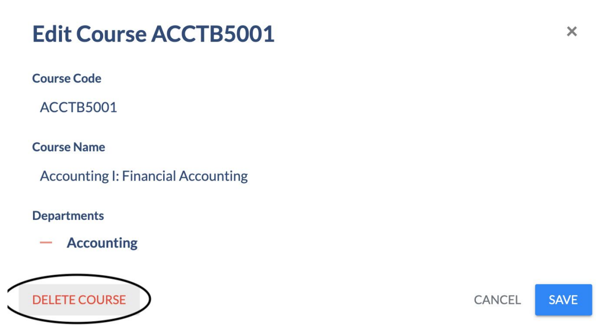
To Not Offer a Rolled Over Course

If you do not want to offer a course that was rolled over, follow the below steps:

- Select the **Arrow** to the left of the **Course Name** in order to expand the course information so that you can see the Course Description, Linked Sections, and Course Info

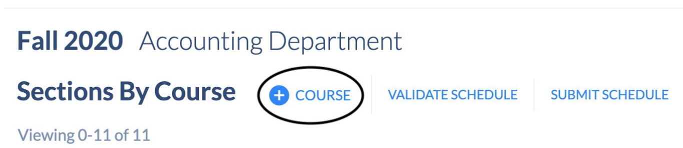


- Select **Course Info**
- Select **Delete Course**

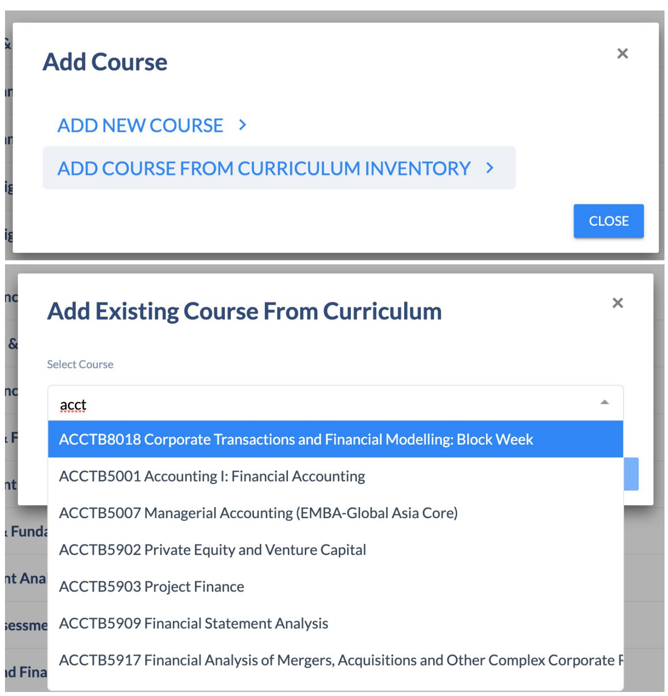


- **Planning Non-Rolled Over Schedule - *Access Opens First Full Week of April***
    - After you have made your planning decisions for all of the rolled over courses, you may want to add a course from a previous term that was not rolled over into the schedule, such as adding a course offered every other year, or you may want to add a new course that has been approved for the upcoming academic year.

    To Offer a Course from a Previous Semester
    - Select **+ Course**



    - Select **Add Course from Curriculum Inventory** and search for the applicable course

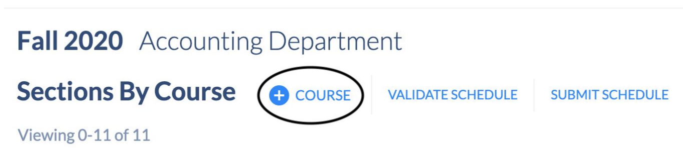


    - Select **Add Course**

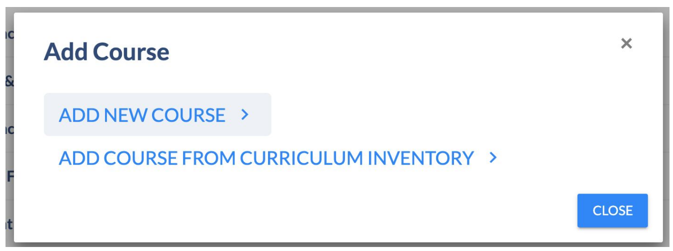
- Once you add the course to the current planning term, follow the above instructions to *Add a Section.* Note you MUST add a section for the course to be offered.
  - If you add a course after planning has ended, please submit a section change request to add a section.

To Offer a New Course

- Select **+ Course**



- Select **Add New Course**

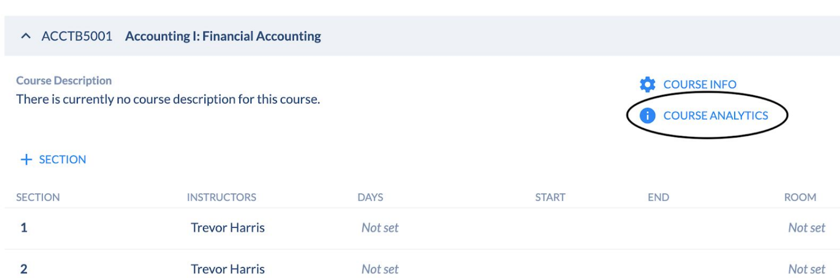


- Add **Course Name**, **Division**, and select **Save**. Note that **Course Code** will be added later once it has been generated for the new course.
- Similar to adding a historical course, you must *Add a Section* for the course to be offered.
  - If you add a course after planning has ended, please submit a section change request to add a section.

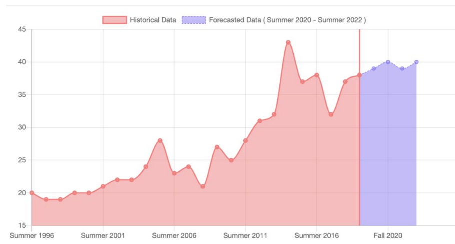
- **Tips on How to Make Informed Planning Decisions**
  - Coursedog offers Demand Analytics -- a forecasting tool that leverages historical enrollment data to forecast the number of seats and sections an institution should offer for future terms.
  - You can use this tool as one datapoint in your decision to offer courses and sections.

  To View Course Demand Analytics

  - Select **Course Analytics**



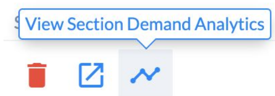
- This will show information aggregated across all sections of that course, example below:

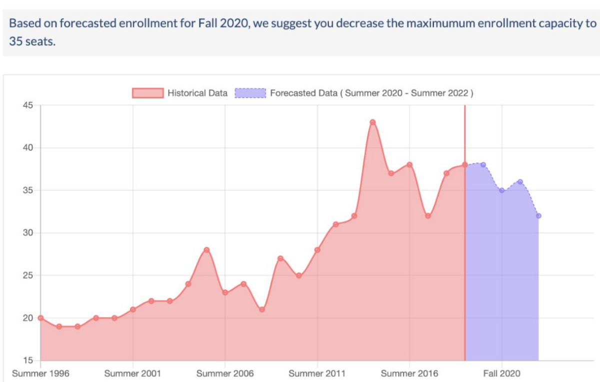


Term	Enrollment	Max Enrollment Capacity	Waitlist	No. Of Sections
Summer 2022	40 (Forecast)	42.5	0	2

To View Section Demand Analytics

- Select **View Section Demand Analytics**
- This will show information for that specific section of that course, example below

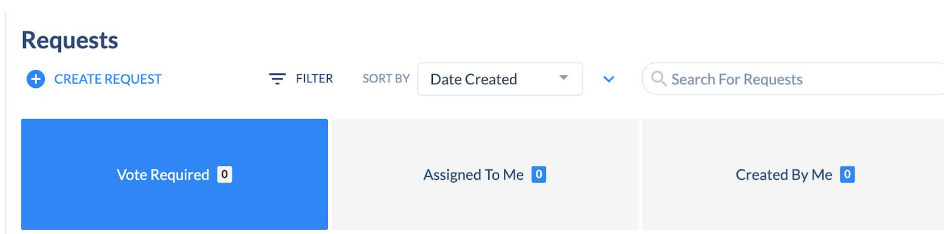




Term	Enrollment	Max Enrollment Capacity	Waitlist
Summer 2022	32 (Forecast)	45	0
Summer 2021	36 (Forecast)	45	0
Fall 2020	35 (Forecast)	45	0
Summer 2020	38 (Forecast)	45	6
Summer 2019	38	40	12
Summer 2018	37	40	10
Summer 2017	32	40	5

Change Requests

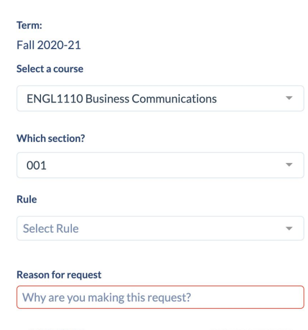
The **Requests** tab in the dashboard is a central location to submit and track all of your requests. Make sure that your requests fit within the planning timeline outlined on the Home Page.



Submit a Request

- Select **+Create Request** and select the relevant *Request Type*, **Rule Exception** or **Section Change**

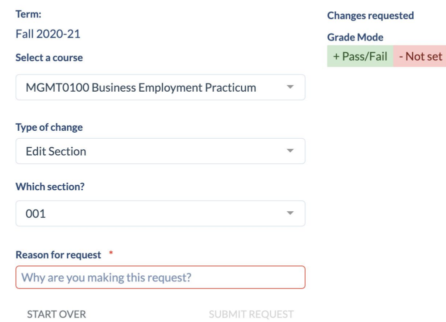
Rule Exception



- Coursedog enforces certain rules, which are flagged with yellow warning symbols. If you believe you have an approved exemption to a rule, you can submit it here.

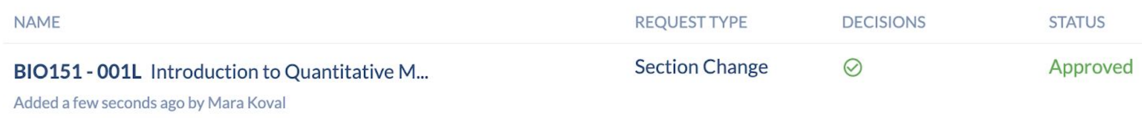
Submit Section Change Requests

- Section change requests can be used for two things: editing locked fields within the planning window, or adding, editing, or deleting a section outside of the planning window (once you lose editing access).
- You can request section changes to any data field in a particular section. First, select a **Section**, provide a **Reason** for the request, and then make any requested edits in the input fields. Note that these input fields are identical to the fields in the **Section Editor**.

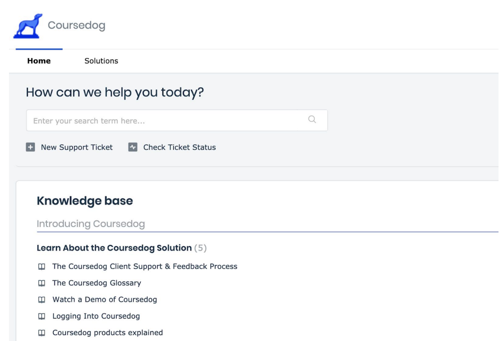


Request Workflow

- After requests are submitted, the status can be tracked on the **Requests** page under **My Requests**. You additionally will receive notifications for any status changes.
- Once approved, these changes will be automatically updated in Coursedog.



Help & Contact Information



- Coursedog offers two separate avenues for support:
  - **Freshdesk** is your go-to for help documentation, how-to articles and best practice suggestions. It can be accessed through the **Help Center** button in the upper-right side of the screen, or at Coursedog.freshdesk.com**.**
  - **Canny** is your destination to track the product roadmap and influence it through feature suggestions. You can additionally view and 'upvote' other customers' requests, which Coursedog takes into account when discussing product updates. Canny additionally houses the Coursedog changelog, which details all of the recent updates to the platform. You can additionally submit any bugs, such as a page not directing to the expected location, or an error. You can access Canny through the **Lightning Bolt** button in the upper-right side of the screen, or at Coursedog.canny.io.
- Institutional contacts are a great resource for scheduling and training specific questions, and can be found below:

  - Accounting: Rachel Horton rah2203@gsb.columbia.edu
  - DRO: Gabriel Mejia gm2576@gsb.columbia.edu

- Economics/Finance: Cara Mandarino cbb2141@gsb.columbia.edu
- Management: Kate Haupert keh2191@gsb.columbia.edu
- Marketing: Rachel Horton rah2203@gsb.columbia.edu

- The training video can be found here.
- AY 2020-2021 Timeline
  - April 1-22: Enter course plans for Fall 2020, Spring 2021, Summer 2021
  - April 22-27: Dean's Office, Program Offices, and Samberg review plans
  - April 27-May 1: Divisional Meetings
  - May 1-May 8: Coursedog open for final edits