

Populi Instruction for Administrative

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1. Setting Up And Managing Your School's Populi Account

These articles cover the settings and functions in the Account section of Populi, which is available to your school's Populi Account Administrator(s) and Billing Contact.

- [Setting up your school's new Populi account](#)
- [Overview of the Data Migration Process](#)
- [Add your Populi site's DNS records and Populi's SPF record to your domain so emails aren't marked as spam](#)
- [Managing settings for your school's Populi account](#)
- [Security settings for your school's Populi account](#)
- [Localizations](#)

1.1 Setting Up Your School's New Populi Account

Here are the steps you'll take when you first set up your school's new Populi account. If you have any questions about this, don't hesitate to contact your Populi Account Manager.

Setting up your account

Using the account setup site, you'll give us the basic information to establish your school's unique Populi site as well as your own user account.

1. You'll receive an email from `notifications@populi.co` with a link to the New Account Setup form.
2. On that form, you'll provide us with your name and email address. We'll use this to set up your user account.
3. You'll also provide us with basic information about your school. The most important item here will be your school's Populi URL—this will set up the site where everyone at your school will eventually access Populi. You'll also tell us whether you wish to import legacy data from your old system into Populi.
4. Finally, you'll indicate your acceptance of our [Terms of Service](#) and [Acceptable Use Policy](#).

Here's what will happen after you submit the form:

- We will create your school's Populi site with the URL you chose. It will include some basic academic information (which you can easily edit for your own purposes) to help you get started with setting up the various sections of Populi.
- You will receive a welcome email with a link to set up a password and log in for the first time.
- You will be listed as the Populi Account Administrator and Billing Contact for your school's Populi site. This will let you enter some important settings, [pay your Populi invoices](#), add other users to your account, and [upload data for migration into Populi](#) (if required).

Very important: Add the Populi SPF record to your domain

The very first thing you'll need to do is add Populi's SPF record to your school's domain. If that sounds technical and over-your-head, don't worry—whoever manages your school's website (whether your own IT staff or an outside contractor) will know what this is. Basically, it lets Populi send email on behalf of your school's web domain in such a way that it will not be marked as spam or blacklisted. Since email is woven throughout Populi, you'll want to get this set up as quickly as possible.

[This article has the details](#). It's a quick, simple change to make, but it does require access to your school's domain manager and a knowledge of how to properly edit your domain's TXT field.

Start adding new people to your system

Even if you're going to be the primary Populi user at your school, setup is a big job and you'll want to get others on board.

- This article describes [how to add new people to Populi](#). (Populi also able to [import people from excel](#)) You'll also want to consider which [user roles you'll assign each person](#).

- This article describes [how to set up user accounts](#).
- Point new users to our [support resources](#) and our guides to [setting up different areas of Populi](#).

Two people you'll want to set up right away:

- Another person to serve as Populi Account Administrator (PAA). It's best to have at least two PAA's so that there's always someone who can access your school's Populi account settings.
- If someone besides you should have the job, a person to serve as your school's Billing Contact. The Billing Contact will receive notices about monthly Populi invoices and will have access to the [Invoice and Payment Settings](#) sections in your Populi Account. (If need be, the other PAA can be the Billing Contact.)

Add another PAA and Billing Contact in your account settings

After adding the two new people mentioned above, you'll go to your Populi Account and list those people in their respective areas of responsibility.

The screenshot displays the Populi Account Settings interface. At the top, there's a navigation bar with 'College Management', 'Files', 'Calendar', 'Financial', 'Bookstore', and 'Library'. The user 'Gemma Frye' is logged in. The main content area is titled 'My Settings' and includes a sidebar with options like 'General', 'Security', 'Notifications', 'Account', 'Account Settings', 'Backups', 'Files', 'Reporting', and 'Invoices/Payments'. The 'Account Settings' section is expanded, showing tabs for 'General Settings', 'Customizations', 'Security', 'Appearance', 'Integrations', 'Single Sign-On (SP)', and 'Single Sign-On (IdP)'. The 'Populi Account Administrator(s)' section is active, with a search bar containing 'Antonia'. Below the search bar, two administrators are listed: 'Antonia Batiste' (antonla@corwith.edu) and 'Gemma Frye'. A 'Save Settings' button is located to the right of the administrator list.

1. To get to the Account section, log in to Populi. Click your name in the upper right corner of the screen and select *Account & Settings*.

2. Under *Account*, go to Account Settings > Security. Scroll down to the *Populi Account Administrator* setting and add that person to the list. Scroll up to the top of the screen and click **Save Settings**.
3. To change the Billing Contact, go to Account > Invoices/Payments > Payment Settings. Find the *Billing Contact* setting and search for the person you'd rather have. Scroll up to the top of the screen and click **Save Settings**.

1.2 Overview Of The Data Migration Process

Here's an overview of the major points of the Populi data migration process. The finer points may vary from school to school, but all implementations follow this storyline. If you have any questions about this, don't hesitate to contact your Populi Account Manager.

Initial account setup

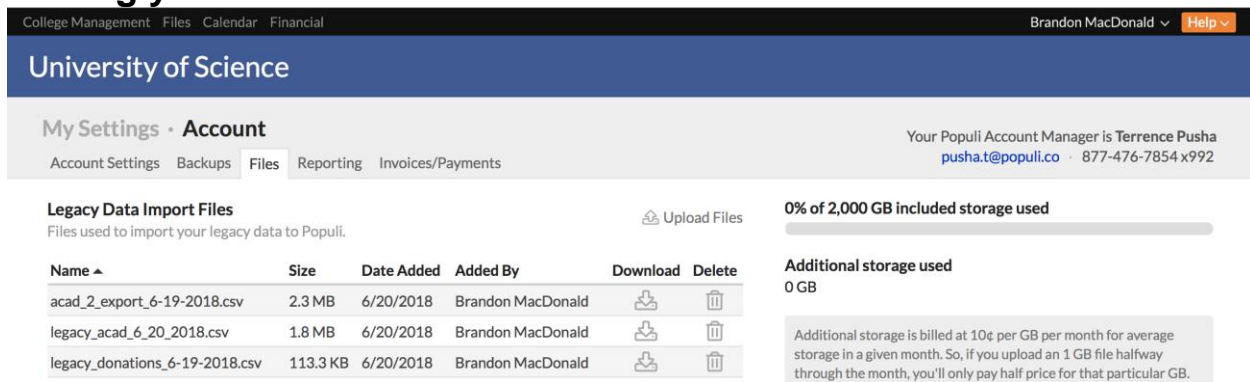
On the initial account setup form, you'll indicate whether you wish to migrate data from your legacy system into Populi. Depending on its quality, we are able to migrate the following data from your legacy system(s) into Populi (subject, of course, to the [Terms of Service](#)):

- **Academic Data:** Course catalog, programs and degrees, current and historic transcripts, together with related data explicitly agreed to by Us and You.
- **Financial Data:** Populi **does not** import historic financial detail. All outstanding student balances and shall be imported as follows: Positive balances shall be associated with one "Balance Forward" fee. Negative balances shall be associated with one "Balance Forward" credit. Such fees and credits shall not contain specific component or payment details.
- **Library Data:** Library resource data in MaRC format (which is converted into Dublin Core for use in Populi Library).
- **Person Data:** Basic personal and contact information for students, faculty, staff, admissions leads, and other people stored in your system.

- **Donations/Donor Data:** Donor information, donation info (amount, fund, campaign, payment method, custom info, etc).
- **Admissions Data:** Lead names and contact information.

If your school is not migrating data from a legacy system, then your Populi site is ready to go as soon as you complete the signup form. The next thing you'll want to look at is our guide to [setting up different areas of Populi](#). But if you are migrating data, keep reading!

Getting your data to us



College Management Files Calendar Financial Brandon MacDonald Help

University of Science

My Settings - Account Account Settings Backups Files Reporting Invoices/Payments Your Populi Account Manager is Terrence Pusha pusha.t@populi.co 877-476-7854 x992

Legacy Data Import Files Upload Files 0% of 2,000 GB included storage used

Files used to import your legacy data to Populi.

Name	Size	Date Added	Added By	Download	Delete
acad_2_export_6-19-2018.csv	2.3 MB	6/20/2018	Brandon MacDonald		
legacy_acad_6_20_2018.csv	1.8 MB	6/20/2018	Brandon MacDonald		
legacy_donations_6-19-2018.csv	113.3 KB	6/20/2018	Brandon MacDonald		

Additional storage used: 0 GB

Additional storage is billed at 10¢ per GB per month for average storage in a given month. So, if you upload an 1 GB file halfway through the month, you'll only pay half price for that particular GB.

If we're importing legacy data, after completing the [initial setup steps described here](#), you'll need to get your data to us so we can begin converting it for use in Populi.

The most secure way to transfer your data to us is by using the Upload feature in your Populi Account section (if you prefer another method, you're welcome to use it—make sure to let us know what you'll be doing).

1. Get a **ho!** of your legacy database. For Microsoft Access databases, send the `.MDB` or `.ACCDB` file. For MS SQL databases, send the `.BAK` file. If you have questions about data formatting and what we need on our end, please [contact Populi customer support](#).
2. Once you have the database files, compress them using a ZIP program.
3. Log in to Populi and go to the Account section.
4. Click the *Files* view.
5. Under *Legacy Data Import Files*, click **Upload Files**.

6. Upload the files.
7. Click **Done** when you're finished.

During the data testing phase (see below), you may need to repeat the above steps as we refine our import scripts and test them against the most current version of your database.

Initial migration and data testing

Now that we have your legacy data, we begin working on scripts to translate it into Populi's database structure. Depending on the format and condition of your data, this generally takes from four to sixteen weeks. During this time you can continue using your existing system as usual.

At the end of this phase, we import this "first draft" copy of your data into a Populi "testing" site.

- This testing site is different than the Populi site you created during account setup (also known as your "live" site).
- The testing site is temporary and will go away once the data migration process is complete. The live site is what your school will be using.
- Your live site login will also get you into the testing site.
- Your testing site will be periodically overwritten as the data import scripts are refined (see below). Your live site will not be affected—you can start [setting up Populi for your school](#).

Some data testing & review pointers:

- Get a team of people together to perform the review. Make sure they're familiar with your previous system and database. No one knows your data better than you, so make sure to devote staff time to this effort!
 - This article describes [how to add new people to Populi](#). You'll also want to consider which [user roles you'll assign each person](#).
 - This article describes [how to set up user accounts](#).

- Compare transcripts from your old system to the new ones generated in Populi. Common issues include grade scales, transfer credits, retakes, and any unusual academic situations.
- Examine things like contact information and any custom fields we've imported.
- When you find errors or incorrect data in the testing site, don't change it in Populi! Your changes will be overwritten by subsequent data imports.
- Report your comments and any issues to us. We'll incorporate your feedback as we refine the import scripts.

Data testing depends on the condition and complexity of your previous system, how aggressively you test the data, and how many problems are uncovered and reported.

Final import

When you are ready to sign off on the imported data, we'll schedule a time to push the finished data to your live site. The process works as follows:

1. You transfer the *final* copy of your legacy database to us via Account > Files (see above).
2. We use the improved import script to move the data into Populi.
3. We shut down your testing site.

If you've been using your old system up until this time, at this point you should stop using it (unless you want to double-enter it in two systems). Some additional setup of Populi is still required, but your school's live site now contains your historic data.

1.3 Add Your Populi Site's DNS Records And Populi's SPF Record To Your Domain So Emails Aren't Marked As Spam

Email is everywhere in Populi. One of the things Populi is meant to do is let you use your data to communicate more easily with the right people. From mailing lists to course communications to plain

ol' *Send Email* links under profile pictures, it's never difficult to find a way to send people messages. Suffice it to say, you'll be using email in Populi— *a lot*.

When you send email through Populi, that email is sent by Populi *on behalf* of your domain. To explain...

- Say your web domain is `www.college.edu` and your email address is `admin@college.edu`.
- When sending an email using your smartphone or email client, the recipient's email host examines your message to confirm that the email from `admin@college.edu` was actually sent by the `college.edu` servers. By doing this, it can confirm the authenticity of your message. (Messages sent by a malicious user from other servers, claiming to be from your email address, would be considered spam.)
- Populi generates email on your behalf when you use it to communicate with other users, and special authorization is needed so that Internet mail servers do not suspect Populi of transmitting mail improperly. These authorizations are established in the **DNS records** for your `college.edu` domain name. (DNS records are supported by registrars like GoDaddy, HostGator, etc. and your IT staff should be able to manage their contents.)

Populi recommends the use of several forms of DNS records in order to be able to send mail on your behalf with the utmost confidence that it will be trusted by mail servers. `TXT` and `CNAME` records are used for the highest form of email authentication, and `SPF` records are used as a secondary form of trust.

DNS records are associated with each domain name where your users have email addresses. If your users include `johndoe@students.college.edu` and `janedoe@staff.college.edu`, these would be two separate domain name configurations. In such cases, we can provide DNS entries for both configurations.

The point of all this is that to use Populi email successfully, you need update your domain with your Populi site's DNS records as well as Populi's SPF record.

Home Files Calendar Financial Bookstore Library Q Search Help

Corwith College

My Profile
Account & Settings
Log Out

My Settings

- General
- Security
- Notifications

Sent Messages

- Email
- Text Messages

Account

- Account Settings
- Backups
- Files
- Automations
- Reporting
- Communications**
- Invoices/Payments

Outbound Email Authorization

Email servers on the Internet use advanced monitoring to reject (or mark as "spam") emails which are considered to be inauthentic. Because Populi routinely sends emails on behalf of your users, steps must be taken to authorize Populi as a sender for your users' email addresses and avoid these messages being wrongly treated as spam.

For best results, we strongly recommend working with your DNS provider to add the following records. **Validation status will be updated within a few hours of clicking the "Request Domain Validation" button.**

Email Domain: corwith.edu

[Request Domain Validation](#)

DNS Records - Verified

With the following DNS records present, Populi can send mail on behalf of your users with the highest possible level of authenticity.

Type	Name	Value
TXT	corwith.edu	69zKt9E1Mmbc3xdle+hf45LexpHLFbp0Gx9zRz+

Do this by visiting your domain register (GoDaddy, Hostgator, etc.). Log in to your domain manager, and in the space where you can edit your TXT field, add the following:

- The DNS records provided in Account > Communications.
- `v=spf1 a mx include:email.populi.co ~all`
 - If you already have an SPF record in that field, you'll need to merge the two.
- After entering these items, go to Account > Communications and click **Request Domain Validation**. It can take a few hours to complete validation of the SPF and DNS records (other than updating your domain registry, you need take no further action in Populi). Upon their validation, you'll see the indicator in Account > Communications update itself.
- If necessary, you can return to this spot and press the **Request...** button again to update the validation.

Additionally, make sure that your users have a school email address listed on their profiles—whether or not it's marked as primary.

Feel free to [contact us with questions](#) and we'll do our best to help you.

Now that you have our DNS and SPF records included on your domain, you're ready to [start adding other users...](#)

1.4 Managing Settings For Your School's Populi Account

College Management Files Calendar Financial Bookstore Library Gemma Frye Help

Corwith College

My Settings

General Settings Customizations Security Appearance Integrations Single Sign-On (SP) Single Sign-On (IdP)

General
Security
Notifications

Account

Account Settings Backups Files Reporting Invoices/Payments

Address
Your institution's primary mailing address.

342 Voicewater Lane

Peola

Washington 99347

United States of America

Save Settings

Fax
Your institution's primary fax number.

5098340002

The Account section is accessible to your school's Populi Account Administrator(s); the Invoices/Payments view is also available to your school's Billing Contact. It lets you [pay your school's Populi invoices](#), control general settings for your school's Populi setup, [security](#), and appearance, as well as download data backup files, monitor various account usage stats, and use some high-level reporting tools. You can even set up a [localization](#)—a translation of Populi for your users who don't speak or read English.

To get to the Account section:

1. You must first be listed as an Account Administrator or Billing Contact.
2. Click your name next to the *Help* link in the upper right of the screen.
3. Select *Account & Settings*.
4. Click the *Account* view (next to *My Settings*).

Account Administrators

Every school has at least one Populi Account Administrator (AA). The AA is a high-level Staff member who ought to have access to the sensitive settings and information in the Account section. In other words, don't hand out this access willy-nilly! It's best to have two AAs, and also good to keep this access restricted to those who *need* to have it.

Your school's first AA was the person who initially [set up your school's Populi account](#). Additional AA's can be added by giving an existing user the Staff role and then going to [Account > Security](#) to add that person as an AA.

Account Settings

General Settings

The contact info fields here are reproduced on your school's transcripts and other exported documents (financial statements, etc.) that use Populi's built-in templates. Additionally, you'll find a couple settings that govern how your school's data will be reported to IPEDS.

Customizations

These settings enable and disable various features throughout Populi. If you elect to later set up [Bookstore](#) and [Library](#), you'll come here to take the final step to *enable* them.

Security

Security settings govern how a variety of sensitive items are handled, including whether your school uses login approvals. Read about [security settings](#).

Appearance

The appearance settings let you customize the colors in your school's Populi header, upload logo files, and customize some other items.

Integrations and Single Sign-On (with Google)

These are sensitive settings that should be managed by someone with technical expertise. You can read more about these functions in the [Developer articles](#); LTI tools are covered in [this article](#).

Localizations

Localizations let you supply a translation of some or all of your school's Populi site for non-English-speaking users. Read about [setting up a localization](#).

Backups

Requested At	Requested By	Status
Apr 23, 2018 5:11 am	API_Populi Integration	Completed
Apr 22, 2018 5:11 am	API_Populi Integration	Completed
Apr 21, 2018 5:10 am	Gerrold Pike	Completed
Apr 20, 2018 5:10 am	Dana Simplotte	Completed
Apr 19, 2018 5:11 am	Shara Nuñez	Completed
Apr 18, 2018 5:10 am	BC_Populi Integration	Completed
Apr 17, 2018 5:10 am	API_Populi Integration	Completed
Apr 16, 2018 5:10 am	API_Populi Integration	Deleted

When you request a backup, you are downloading your core academic and financial data into CSV files. This process can take anywhere from several minutes to several hours.

Populi will send you an email once your backup is ready. You can return here to download it. Backups are available for one week from the time they are made available, after which they are deleted.

You may request one backup every 24 hours.

It has been less than 24 hours since your last backup request.

Populi lets you download your core data once every 24 hours from Account > Backups. The backup file includes:

- **Academics:** Everything from transcripts to transfer credits, from course lessons to the course catalog
- **Financial transactions:** Invoices, payments, financial aid, and donations
- **Admissions:** Applications and all the information you have for your leads
- **People:** All the people in your system together with all their contact and other personal info
- **Other items:** Your entire Bookstore and Library

You can manually download the backup every 24 hours.

1. Click **Request a Backup**.

2. Populi will begin preparing CSV files of your current data. This process can take anywhere from several minutes to several hours. It will go on behind the scenes, so you can go do something else for the time being.
3. When the backup is ready, you'll receive an email. Return to the Backups section to download it. Backups are available for one week from the time they are made available, after which they are deleted.
4. Keep the backup file safe! Now that it's exported from Populi, it's up to you to keep this information secure.

You can also use the [API](#) to automatically download backups.

For details about how your backed-up data is stored and deleted in compliance with the European Union's GDPR, [have a look at this article](#).

Files

The screenshot shows the 'Files' settings page in the Populi system. The top navigation bar includes 'College Management', 'Files', 'Calendar', 'Financial', 'Bookstore', and 'Library'. The user's name 'Gemma Frye' and a 'Help' link are in the top right. The sidebar on the left has 'My Settings' (General, Security, Notifications) and 'Account' (Account Settings, Backups, Files, Reporting, Invoices/Payments). The main content area features a table of file types and their storage usage:

File Type	GB Used
Audio	25.06
PDF Document	6.15
Video	4.98
Image	1.32
Document	1.22
Presentation	0.85
Other	0.40
Spreadsheet	0.01
Total	39.99

Below the table, there is a section for 'Personal File Storage Limits' with a description: 'Set the personal file storage limits for role members. If a user is a member of more than one role the highest limit will apply.' A table shows limits for 'Academic Admin' (2 GB) and 'Academic Auditor' (500 MB). A progress bar indicates '4% of 1,000 GB included storage used'. A note states: 'Additional storage used 0 GB. Additional storage is billed at 10¢ per GB per month for average storage in a given month. So, if you upload an 1 GB file halfway through the month, you'll only pay half price for that particular GB.'

The Files view keeps track of how much of your school's file storage has been used. "Files" include all files the users at your school have uploaded to Populi—including documents, images, videos, profile pictures, etc. See the [Populi Terms of Service](#) for details.

You can also manage the [personal file storage](#) limits for the user role groups at your school:

1. Click  next to the user role.

2. Enter the number of MB worth of file storage you wish people with that user role to have.
- Every 1000 MB is a GB.
 - Remember that individual users' personal file storage counts towards your school's overall file storage limit!
 - If a user has multiple roles, the role with the highest limit will determine his personal file storage limit.
- When you're done, click **Save**.

Reporting

College Management Files Calendar Financial Bookstore Library Gemma Frye Help

Corwith College

My Profile
Account & Settings
Log Out

My Settings
General
Security
Notifications

Account
Account Settings
Backups
Files
Reporting
Invoices/Payments

Changes Logins Integrations

Type: All Timeframe: Last 90 days Apply Reset Export XLS Export CSV

Filter · 105 results New Person last 90 · Load Save

Match all of these conditions: Choose a condition

Type is Person

Apply Filter Reset Filter Add conditions

Changed at	Changed by	Affected Type	Affected	Type	Action Change
Oct 25, 2019 3:44pm	Gemma Frye	Person	Gerry Thamon	Person Added	Created by Gemma Frye.
Oct 14, 2019 12:17pm	Gemma Frye	Person	Darjan Pritchett	Person Added	Created by Gemma Frye.
Oct 14, 2019 12:16pm	Gemma Frye	Person	Henry Cardinal	Person Added	Created by Gemma Frye.
Oct 14, 2019 12:16pm	Gemma Frye	Person	Neri del Valle	Person Added	Created by Gemma Frye.

The Reporting view gives you three reporting tools, each of which can [be filtered](#) to zoom in on the relevant information:

- **Changes:** This is a master changelog of all items in your school's Populi instance for which changes are tracked.
- **Logins:** This records all login attempts—both successes and failures—recorded for your school's Populi instance.

- **Integrations:** Primarily of interest to technical folk and masochists, this records the various messages (successes and errors) produced by your school's various software integrations.

1.5 Security Settings For Your School's Populi Account

College Management Files Calendar Financial Bookstore Library

Gemma Frye Help

Corwith College

My Profile
Account & Settings
Log Out

My Settings

General Settings Customizations Security Appearance Integrations Single Sign-On (SP) Single Sign-On (IdP)

General
Security
Notifications

Account

Account Settings
Backups
Files

Allow all users to upload ID photos
Select "Yes" to permit all users to upload their own ID photos. Select "No" to permit only Staff and Faculty to upload their own ID photos; Staff will manage ID photos for students, leads, etc.

Yes No

Save Settings

Make New Contact Information Private By Default
Private contact information is only visible to Staff users. Staff can update privacy settings for individual contact info items at any time.

Security settings lets you manage access to sensitive items in Populi. Whenever you update these settings, scroll back to the top of the screen and click **Save Settings**.

Allow all users to upload their own ID photos

Select *Yes* to allow anyone with a Populi user account to upload her own ID photo on her Profile. Select *No* to restrict this ability to users with the Staff or Faculty role. Staff users will be able to manage ID photos for all people—students, leads, others—whether you select *Yes* or *No*.

Allow all users to edit their own bios

Select *Yes* to permit all users to edit their own bios. Select *No* to permit only Staff and Faculty to edit their own bios; Staff will manage bios for students, leads, etc.

Make new contact information private by default

Select *Yes* to set all new contact information to *Private*. Select *No* to set such to *Public*. In either case, Staff users can manage privacy settings for any individual piece of contact information. Private contact information is visible only to Staff users.

Social Security Numbers may be accessed by:

Academic Admins can enter, view, update, and export full, unmasked Social Security Numbers and Social Insurance Numbers (Staff users can enter them initially, but cannot view them afterwards).

Check to extend this access to SSN/SIN to Financial Admin, Financial Aid, Registrar, or Staff users.

Allow the Academic Auditor role to view course evaluations

Check whether you wish to permit Academic Auditors to be able to view and export course evaluations.

Populi account administrator(s)

The people listed here have access to all of your school's Populi account settings, as well as the Reporting and Invoices/Payments views.

- Search for Staff users to add a new account administrator.
- Click to remove someone from this list.

Make relationships between people and organizations private by default

When you link people to organizations, all other users will be able to see that information about the person. You can set these relationships to default to *private*, which makes them visible only to Staff, Faculty, and Advisor users. Staff can edit the visibility of this relationship for any individual person at any time.

Enable scheduling for all users

Select *Yes* to let all users schedule rooms and resources and invite attendees to events.

Select *No* to restrict this to staff and faculty users.

Account username template

Populi's default username format is first initial, last name, and last two numerals of the current year.

If you give John Smith an account in January 2022, his automatically-generated username will be *jsmith22*. To change the default username format, have a look [at this article](#).

Allow students to create public groups

[Groups](#) provide a space in Populi for different segments of your school's community—clubs, teams, committees, etc.—to communicate, share files, and create events with other members of that group.

This setting lets you control whether students can set up a public group:

- Select *Yes* to permit students to create groups.
- Select *Require staff approval* to permit students to create groups [pending staff approval](#).
- Select *No* to permit only Staff and Faculty to create groups.

By default, students can create private groups. If you'd like to change it so that they cannot do this, please [contact Populi customer support](#) and we'll flip a switch on our end.

Login approvals

Login approval is a security measure that helps protect individual Populi user accounts. Here's how it works:

1. A user has an authenticator app on his smartphone.
2. He logs in to Populi in a new browser or using a new device (phone, iPad, a new computer, etc.).
3. The authenticator app generates a new, one-time passcode.
4. He enters the code to finish logging in.
5. That device (or browser) is now "recognized"; recognized devices do not require a passcode for future logins.

Login approval guards against unauthorized access to Populi by requiring that the person logging in have the username, password, *and* the code generated by the authenticator app on the user's smartphone.

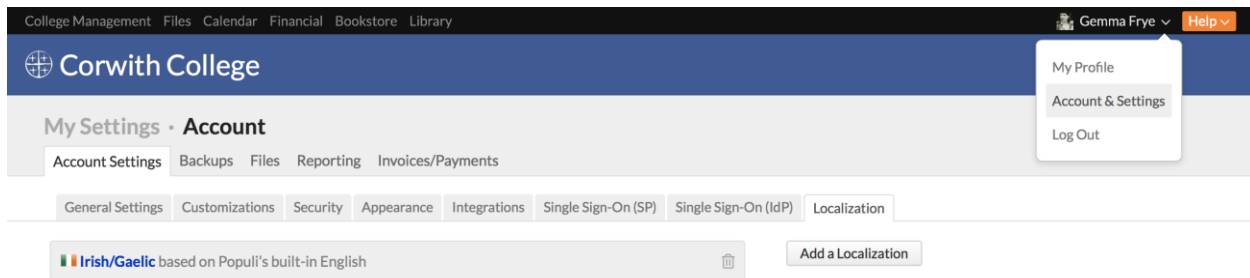
These settings let you allow or require people with certain user roles to use login approval for their Populi account.

- If *Allowed*, users with that role have the *option* of using login approval, but can also opt to *not* use it.
- If *Required*, all users with that role must use login approval.
- If neither is checked, users with that role log in with only a username and password.

To change the login approval settings for a given user role:

1. Check *allowed* or *required* next to the roles you'd like to update.
2. Scroll to the top of the settings page and click **Save Settings**.
3. As soon as you do this:
 - The next time someone whose role *requires* login approval tries to log in on any browser or device, the authenticator app will generate a passcode; she'll need to enter it in order to log in.
 - Users whose roles *allow* login approval can enable it in their own [personal Populi settings](#).

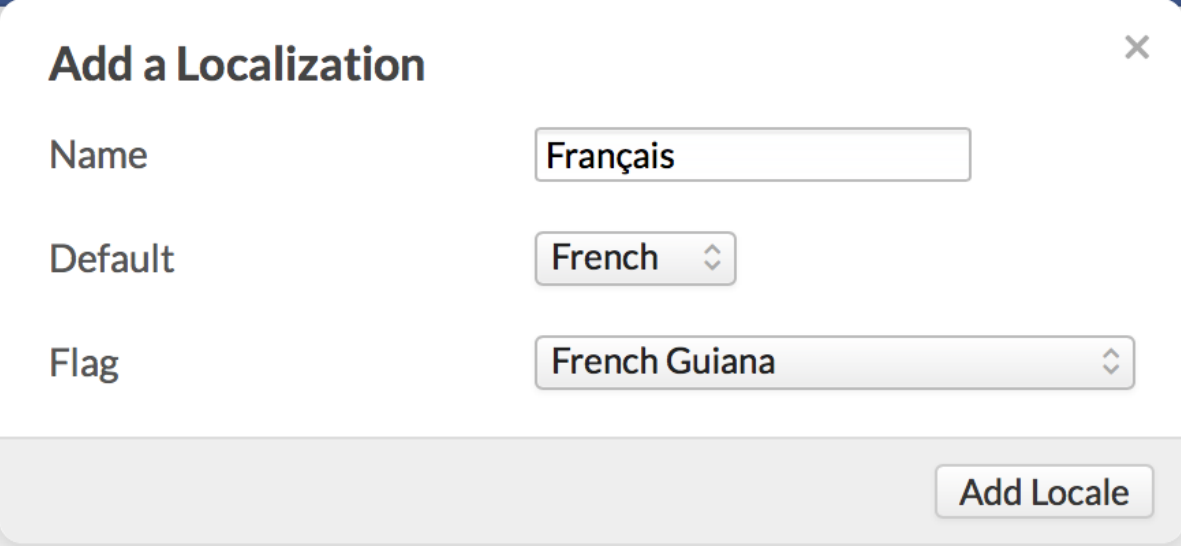
1.6 Localizations



Localizations let you provide a translated version of Populi to your international users.

1. You create a new localization in Account > Localizations.
2. You embark on the translation work. You can translate Populi's interface elements as well as your own content (Academic Term names, application questions, etc.).
3. When the localization is complete enough for your needs, you can then assign it to people on their Profiles.
4. The user will then experience Populi with the translation you supplied.

Add a new localization



Add a Localization ×

Name

Default

Flag

Add Locale

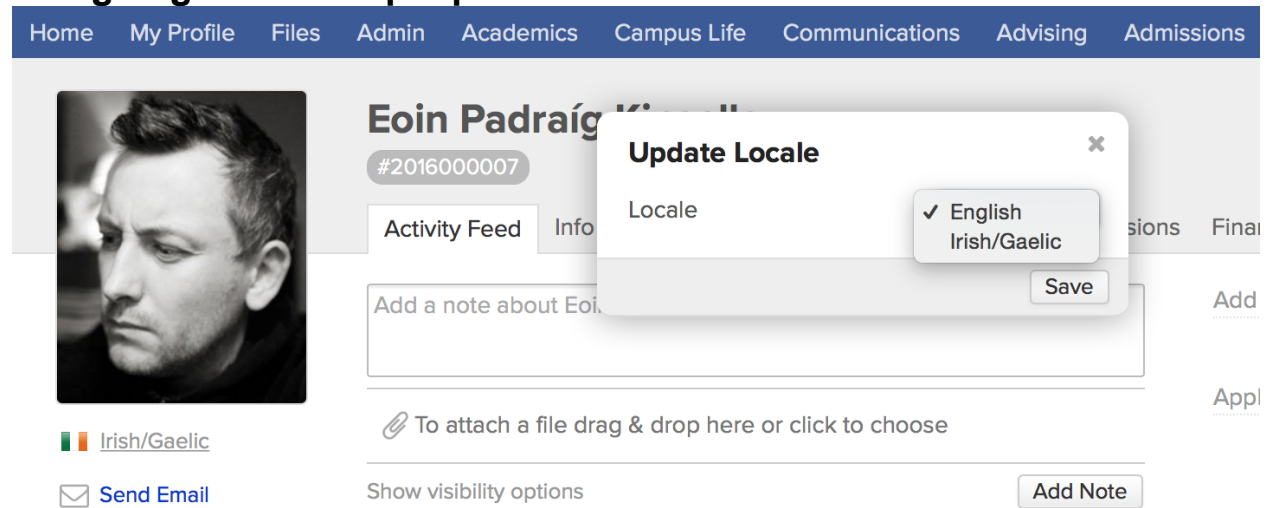
1. Click **Add a Localization**.
2. Give it a name. This should probably be the language into which you're translating Populi.
3. Select the *Default* language. This is the language that will be displayed when a term remains untranslated. Populi includes built-in defaults for English, Spanish, French, German, Korean, Portuguese, and Chinese.
4. Select a country flag; this will display on a person's profile when you assign this localization to him.

Translating Populi

The screenshot shows the Populi localization settings interface. At the top, there is a navigation bar with tabs for Account Settings, Backups, Files, Automations, Reporting, and Invoices/Payments. Below this is a secondary navigation bar with tabs for General Settings, Customizations, Appearance, Integrations, Single Sign-On (SP), Single Sign-On (IdP), and Localization. The Localization tab is active. Under Localization, there is a dropdown menu for the language, currently set to 'Irish/Gaelic' with a small Irish flag icon. To the right of the language dropdown is a dropdown menu for 'Interface Text'. Below these are two more dropdown menus: one for 'All' and another for navigation buttons labeled 'Prev', '1', '2', '3', '4', '5', '6', '7', and 'Next'. The main content area is a table with two columns: 'Base Text' and 'Translation into Irish/Gaelic'. The first row shows 'Donor Last Name' in the 'Base Text' column and 'Deontóra Sloinne' in the 'Translation into Irish/Gaelic' column. A green checkmark is visible to the right of the translation text. Below the table is a text input field with the placeholder text 'Translation goes here...'.

1. Click the name of the localization in the main list to go to the translation page.
 2. Next to the localization's name, choose the elements you wish to translate:
 - **Interface text** refers to Populi's built-in language elements—navigation views, buttons, headings, etc.
 - The remaining elements are the names of things that you have supplied—application fields, academic term names, refund policies, and so on.
- Now it's time to supply translations for these terms. Just enter the translated text in the text area; when a green check mark appears that means Populi has saved it. Let's be honest: this part will take awhile. Use the filter above the navigation buttons to see *All*, *Translated*, or *Untranslated* text.
 - If you're translating Populi for the use of a subset of people concentrate on translating only those elements that they'll see. If you're translating for students, for example, focus on the things they'll see in Courses and My Profile.
 - Since translations auto-save as you work, you can navigate away at any time.

Assigning locales to people



The screenshot shows a user profile for Eoin Padraig. The profile includes a photo, a name, a user ID (#2016000007), and a locale set to Irish/Gaelic. An 'Update Locale' dialog box is open, showing a list of locales with 'English' selected and 'Irish/Gaelic' also visible. A 'Save' button is present in the dialog. The background shows navigation links like Home, My Profile, Files, Admin, Academics, Campus Life, Communications, Advising, and Admissions. Other profile elements include 'Activity Feed', 'Info', 'Add a note about Eoin', 'To attach a file drag & drop here or click to choose', 'Send Email', 'Show visibility options', and 'Add Note'.

As soon as you've translated any part of Populi, you can start assigning the localization to the users in your system.

1. Go to the person's profile.
2. Under the profile picture, click the locale name next to the flag icon.
3. Select a locale.
4. Click **Save**.

Now that you've assigned a locale, the user will experience Populi with the translation you supplied the next time he logs in.

2. Academics

These articles cover everything you need to know to set up and start using the academics section of Populi. We recommend working through them in the order they are listed.

- [Step one: start working on academic settings](#)
- [Step two: set up your programs](#)
- [Step three: set up your course catalog](#)
- [Step four: set up course groups, degrees, and specializations](#)
- [Step five: add locations](#)
- [Step six: set up faculty users](#)
- [Step seven: add courses to a term](#)
- [Step eight: add and enroll students](#)
- [Step nine: set up course evaluations](#)
- [Step ten: enter historic academic records](#)
- [Academics setup checklist](#)

2.1 Step One: Start Working On Academic Settings

Academic settings let you establish your preferences for how Populi organizes and calculates academic information. These settings are foundational to most of what you'll be setting up later—programs, courses, degrees, and so on. If you have a good grasp of how your school's setup will work with Populi, you can go ahead and work through all the settings in one go. But if you need to take it slower, that works, too. You can come back at any time to fill in or update these settings.

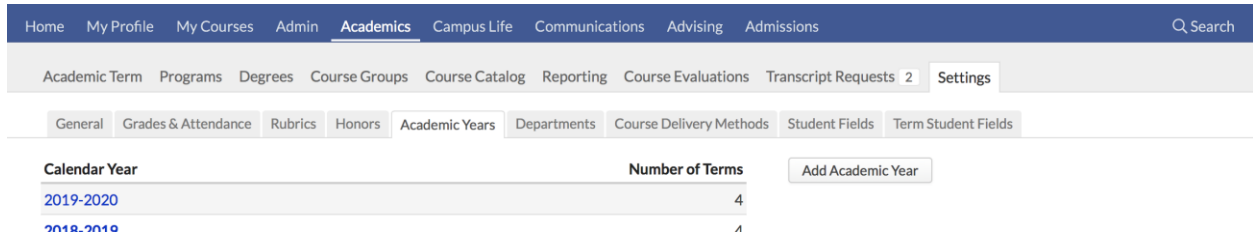
The first thing you need to do is set up Academic Years; you can tackle the other settings in any order you please.

In order to update academic settings, you must have the [Academic Admin](#) role.

If we imported your legacy academic data, then we imported your Academic Years and have most likely filled in some of your settings (including your grade scales). If we did not import any legacy

data, then all of your academic settings are currently set to their default mode. At minimum, you should review them.

First things first: Academic Years!



Calendar Year	Number of Terms	
2019-2020	4	
2018-2019	4	

Academic years help organize almost all of your school's information—including academics, admissions, student billing, and some portions of financial aid. They are foundational to nearly everything else you're going to do in Populi.

Does your school use Federal financial aid? We recommend aligning the start and end dates of your academic years and terms with those of the Federal "aid year", which goes from July 1 of one calendar year to June 30 of the next calendar year. Check with your financial aid office to make sure y'all are all on the same page.

Start by going to [Academics > Settings > Academic Years](#).

Grades & Attendance

The Grades & Attendance settings let you establish letter grade scales, pass/fail grade scales, and various attendance requirements. If you need to change these items for particular academic programs, you can do so later when you set up programs.

Populi provides a basic grade scale (A, B, C, D, F). Feel free to modify this one to your needs. The pass/fail and attendance settings are all optional.

Start by going to [Academics > Settings > Grades & Attendance](#).
[Attendance](#)

General academic settings

General academic settings cover numerous details that will affect the daily operations of your school—global retake policy settings, certain transcript details, and more. You have plenty of latitude about when you take care of your general academic settings, but you should at least look over your options as you consider what your school will need.

Start by going to [Academics > Settings > General Settings](#).

Rubrics

Rubrics are standard guides for evaluating and grading student assignments and other coursework. They can exist at the "global" level—when created in Academics > Settings, they can be used in any course. They can also be created at the individual course level for use only in that course. You don't need rubrics to grade assignments, so they're by no means essential to academic setup.

Start by going to [Academics > Settings > Rubrics](#).

Departments, Honors, and Course Delivery Methods

- **Departments** help organize your degrees and courses. There's no need to overthink them—other than helping you relate courses and degrees in groups, they don't materially affect much.
- **Honors** are academic awards (*Dean's List*, *Summa Cum Laude*, etc.) that you can attach to students manually or via automated GPA triggers.
- **Course Delivery Methods** let you specify how courses are brought to students. Typical examples include *On Campus*, *Online*, *Self-paced*, and so on. You can set up fees to automatically trigger based on a student's enrollment in a course with a particular delivery method.
- Although Populi includes the official IPEDS **Exit Reasons**, should you need to add custom exit reasons for your own internal reporting, you can do that in Academics > Settings. To add a new exit reason, you'll need to map it to one of the official IPEDS reasons.

Start setting up these items by going to Academics > Settings and choosing the appropriate navigation view.

Custom Student Fields

Custom student fields come in two flavors. *Student Fields* are stored in the student information panel in Profile > Student; they're meant for information that doesn't change that often. *Term Student Fields* are stored in Profile > Student > Term Info. They're meant for custom information that changes with the passage of time.

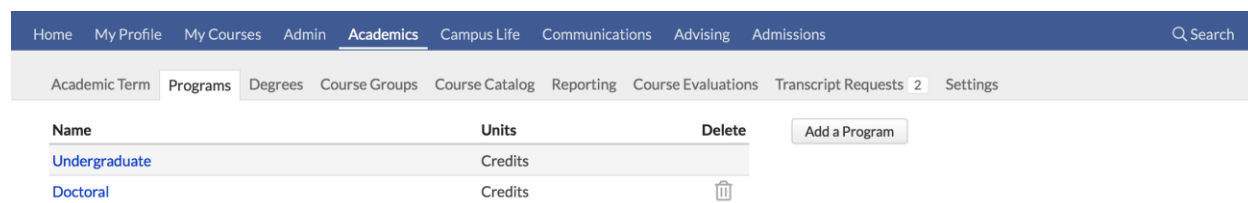
Start by going to [Academics > Settings](#) and choosing the appropriate navigation tab.


Next: [set up your academic programs...](#)

Discipline types

Though not included in the interface for initial academic settings, you may want to give some thought at this point as to whether you'd like us to modify the built-in student discipline types. Learn more [in this article](#).

2.2 Step Two: Set Up Your Programs



Name	Units	Delete	
Undergraduate	Credits		<input type="button" value="Add a Program"/>
Doctoral	Credits		

A program is a course of study with a shared GPA and transcript. In Populi, programs serve primarily to organize [courses](#) and [degrees](#) into distinct tracks of study which may have unique units, grade scales, honors, standings, tuition schedules, and so on. When you associate students with a particular program (or programs), you circumscribe their course of study to include only those courses and degrees encompassed by their program.

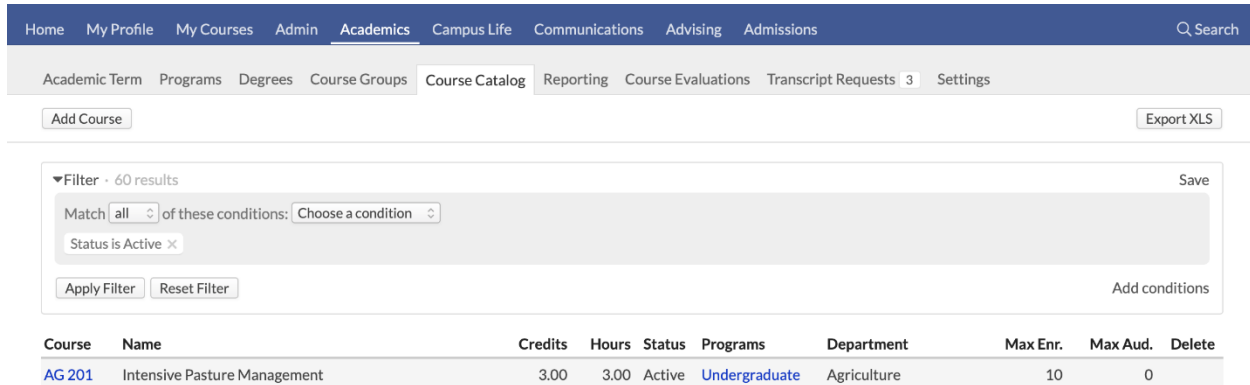
Read more about [programs](#)

If we imported your legacy academic data, please make sure to review the programs we imported for you.

If we didn't import data for you, you can set up or modify the existing Undergraduate Program (if you're a grad school, don't worry—you can change the name) and add additional Programs as needed.

Next: [set up your course catalog...](#)

2.3 Step Three: Set Up Your Course Catalog



The screenshot shows the Course Catalog interface. At the top, there is a navigation bar with links: Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, Admissions, and a search icon. Below this is a secondary navigation bar with links: Academic Term, Programs, Degrees, Course Groups, Course Catalog (highlighted), Reporting, Course Evaluations, Transcript Requests 3, and Settings. There are two buttons: "Add Course" and "Export XLS".

Below the navigation is a filter section:

▼ Filter · 60 results Save

Match of these conditions:

Add conditions

Below the filter is a table of courses:

Course	Name	Credits	Hours	Status	Programs	Department	Max Enr.	Max Aud.	Delete
AG 201	Intensive Pasture Management	3.00	3.00	Active	Undergraduate	Agriculture	10	0	

The Course Catalog contains all the courses ever offered by your school—past, present, and future. In order to offer a particular course to your students, it needs to first exist in your course catalog.

Catalog courses are "templates" for course instances. They contain the information shared in common by all instances of that course (more or less). This includes things like abbreviation, description, [program\(s\)](#), level (Grad, Undergrad), credits/hours, and so forth. You can also define prerequisites and equivalencies.

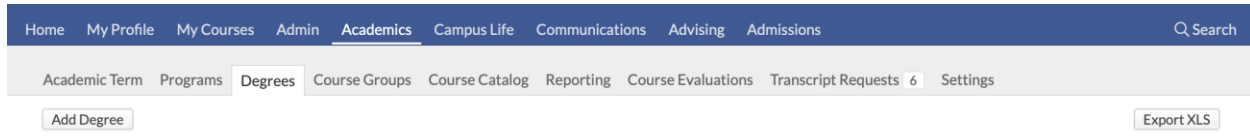
Course instances are courses as they exist within a particular academic term. While they inherit the traits you establish in the catalog, they have particular meeting times, assignments, student roster, section number, etc., unique from other instances of that same course.

Read more about the [Course Catalog](#).

If we imported your legacy academic data, review the catalog courses we imported for you. If we didn't import data for you, just start adding courses to your catalog.

Next: [add course groups, degrees, and specializations...](#)

2.4 Step Four: Set Up Course Groups, Degrees, And Specializations



Filter · 5 results

Degree	Abbreviation	Program	Status	Department
Associate of Fine Arts	AFA	Undergraduate	Active	Art
Bachelor of Fine Arts	BFA	Undergraduate	Active	Art

Degrees are the academic awards that you give to students who complete a course of study at your school. They include everything from your standard 2-year, 4-year, and graduate degrees to post-secondary awards and certificates. Degrees can include [Specializations](#), better known as Majors and Minors.

You can track a student's progress towards her degree by viewing her [degree audit](#). By adding course groups to your degrees, you can use the degree audit to track how she's faring with your degree course requirements.

Course groups serve three purposes:

1. They define course requirements for your degrees and specializations.
2. They let you define a group of courses as equivalent to one another for the purposes of [course prerequisites](#).
3. They let you create a group of courses to which you can [attach a fee](#).

Here's how people typically handle this part of academic setup:

1. First, they add their degrees and their basic requirements.
2. Next, they create course groups, keeping their degrees in mind as they do so.
3. Finally, they go back to their degrees and add course groups for the degree course requirements.

A couple things...

One, if you have complex degree requirements, they may take some time to set up. If you wish, you can proceed with other setup tasks (adding courses in terms, enrolling students, etc.) before finishing Degree Audits—in fact, you can set them up at any point.

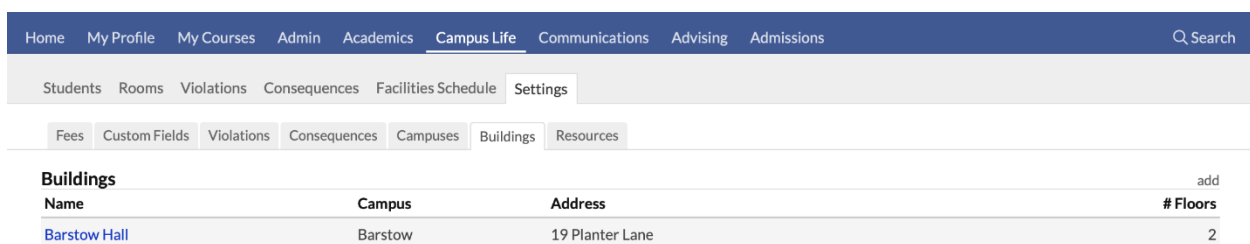
Two, remember that the degree audit helps you make a decision about a student's in-progress Degree. If the student has already graduated, there's no need for an audit! Therefore, there's no need to build audits to cover historic students/degrees. Instead, only build them out for the years in which you still have students pursuing degrees. For example, if everyone who came in under the 2005-2006 year has already graduated, then don't build out that degree. If you still have students working on their 2011-2012 Degree, work on that one instead.

Read more about [Course Groups](#), and then have a look at [Degrees and Specializations](#).

If we imported your legacy academic data, please review the degrees we imported for you. If your legacy system contained degree audits, we likely did not import any of that information owing to its incompatibility with Populi. You'll therefore need to start working on course groups (remembering not to worry about historic degree requirements!). If we didn't import data for you, just start adding course groups and degrees.

Next: [add locations...](#)

2.5 Step Five: Add Locations



The screenshot shows the Populi system interface. At the top is a navigation bar with links: Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, Admissions, and a search icon. Below this is a sub-navigation bar with links: Students, Rooms, Violations, Consequences, Facilities Schedule, and Settings. Under 'Settings', there are tabs for Fees, Custom Fields, Violations, Consequences, Campuses, Buildings, and Resources. The 'Buildings' tab is active, displaying a table with the following data:

Name	Campus	Address	# Floors	add
Barstow Hall	Barstow	19 Planter Lane	2	

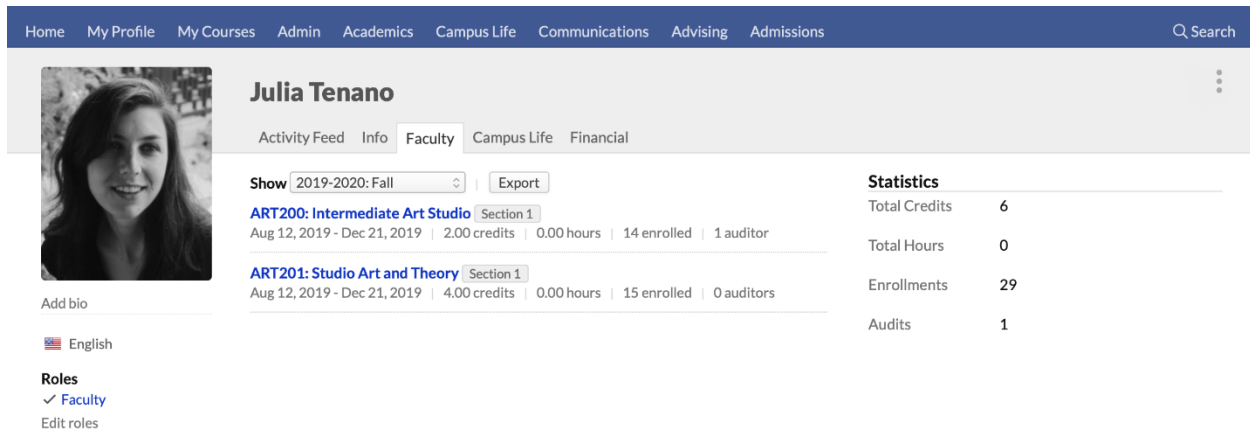
Courses (except those conducted online...) meet in rooms within buildings that are located on campuses. To add meeting times to courses, it's handy to place them in a location (though that isn't strictly necessary). Get started by going to Campus Life > Settings > Campuses or Buildings.

Read more about [campuses and buildings](#).

Take a few minutes to add Locations for your school (this will also help your Billing people set up Room Plans for student housing).

Next: [set up your faculty users...](#)

2.6 Step Six: Set Up Faculty Users



The screenshot shows a user profile for Julia Tenano. The navigation bar includes Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, and Admissions. The profile header shows the name Julia Tenano and tabs for Activity Feed, Info, Faculty, Campus Life, and Financial. The Faculty tab is active, displaying a 'Show' dropdown set to '2019-2020: Fall' and an 'Export' button. Below this, two course sections are listed: ART200: Intermediate Art Studio (Section 1) and ART201: Studio Art and Theory (Section 1). Each course entry includes dates, credits, hours, enrolled students, and auditors. To the right, a 'Statistics' table shows: Total Credits: 6, Total Hours: 0, Enrollments: 29, and Audits: 1. On the left, there is a profile picture, an 'Add bio' link, a language preference for English, and a 'Roles' section with 'Faculty' checked and an 'Edit roles' link.

The Faculty role gives a user the ability to run all aspects of the courses for which she is listed as Faculty (same with the Teaching Assistant role). There are two exceptions to this access:

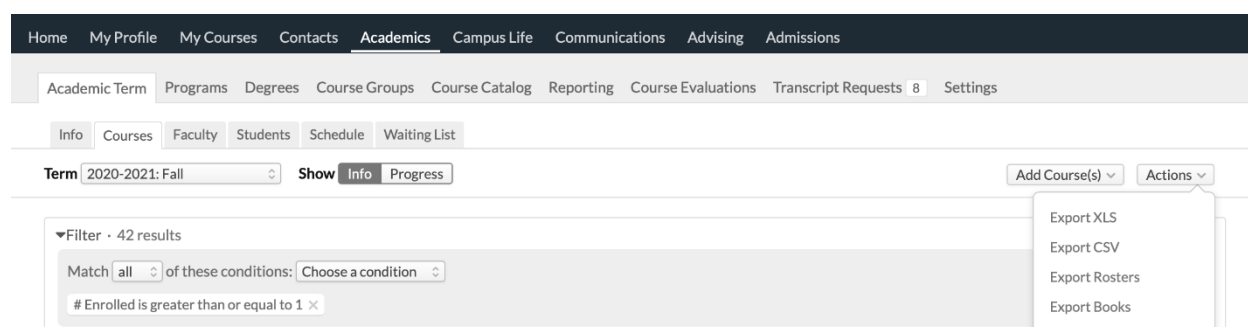
- They cannot modify basic course information (e.g. abbreviation, description, credits, etc.).
- They cannot unfinalize courses.

To get your faculty users ready to run courses in Populi...

1. Find the profile of the person who needs the faculty role. If you can't find her, you may need to [add a new person](#).
2. Follow the instructions in [this article](#) to add the Faculty and/or Teaching Assistant roles to the user.
3. On her Profile > Info tab, make sure you have a valid email address entered for her.
4. Grant her [user access](#) to Populi.
5. Set up course instances (which is covered in the [next step](#)).
6. Direct these users to the [faculty articles](#).

Next: [start adding courses to your academic terms...](#)

2.7 Step Seven: Add Courses To A Term



You've set up academic years and terms, and you've also added courses to your course catalog. Now it's time to create the courses in which your students will enroll, submit assignments, and receive grades (among many other things!). Those are called *course instances*; they are based on the courses you have in your course catalog. Before enrolling students in courses, you need to first add course instances to your academic terms.

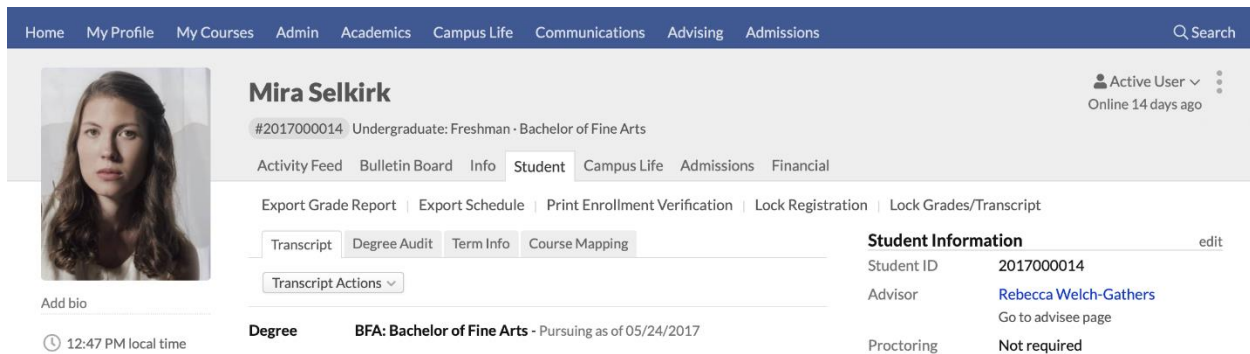
Start by going to Academics > Academic Term > Courses.

Read more about [adding courses in an academic term](#).)You may also want to consider setting up [course evaluations](#) at this time.)

- If we imported your legacy academic data, we likely populated historic and even some future academic terms with course instances.
- If you have courses listed in past academic terms, you can import those courses into future terms using the *import courses* feature.
- If we didn't import data for you, it's best to get your current and next few academic terms set up before filling in [historic terms](#) with course data.

Next: [start adding students...](#)

2.8 Step Eight: Add And Enroll Students



Home My Profile My Courses Admin Academics Campus Life Communications Advising Admissions Search

Mira Selkirk #2017000014 Undergraduate: Freshman - Bachelor of Fine Arts

Active User Online 14 days ago

Activity Feed Bulletin Board Info **Student** Campus Life Admissions Financial

Export Grade Report | Export Schedule | Print Enrollment Verification | Lock Registration | Lock Grades/Transcript

Transcript Degree Audit Term Info Course Mapping

Transcript Actions

Add bio

12:47 PM local time

Degree **BFA: Bachelor of Fine Arts** - Pursuing as of 05/24/2017

Student Information edit

Student ID	2017000014
Advisor	Rebecca Welch-Gathers Go to advisee page
Proctoring	Not required

The Student role enables Populi to track academic information for a person. The role lets a person enroll in or audit courses and triggers Populi to begin recording their academic history.

Setting up student users

To get your students ready to use Populi...

1. Find the person who needs the student role. If you can't find him, you may need to [add a new person](#).
2. Follow the instructions in [this article](#) to add the Student role to the user. When you do this, you'll see the [Student tab](#) on his profile.
3. On his Profile > Info tab, make sure you have a valid email address entered for him.
4. Grant him [user access](#) to Populi.

If we imported your legacy academic data, look over some of the students we imported for you to get a sense of how a detailed student profile will look when you're fully up-and-running.

Enrolling students in courses

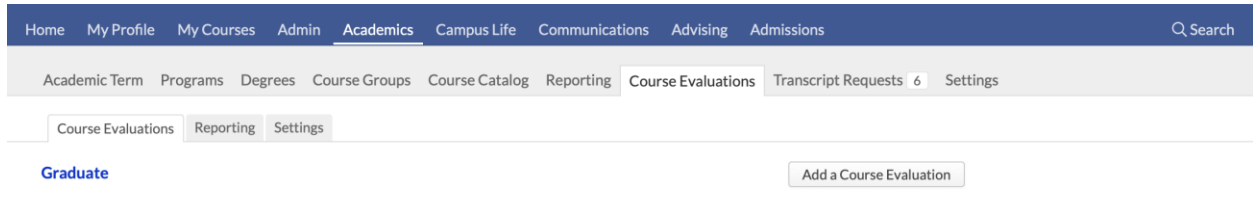
There are three ways you can enroll students in courses:

- Set up [online enrollment](#). This lets students register themselves; Registrars, Academic Admins, and Advisors can also register students using this means. Online enrollment respects prerequisites, waiting lists, and registration locks.

- On the student's profile, you can edit his [courses](#) for any academic term. This method lets you work around prereqs, waiting lists, and account locks.
- On the [course roster](#), you can add students one at a time or several at a time.

Next: [set up course evaluations...](#)

2.9 Step Nine: Set Up Course Evaluations



[Course evaluations](#) let you collect your students' thoughts and opinions on your courses and faculty. You can then make the evaluation and its results available to course faculty as well as run reports. Here's the lifecycle of a course evaluation:

1. An Academic Admin or Registrar designs the evaluation.
2. You attach it to courses in an academic term.
3. You set the evaluation's availability [on the Academic Term page](#), and adjust it for individual courses if necessary.
4. After students take the evaluation, you can review the results in Academics > Course Evaluations > Reporting.

Start by going to Academics > Course Evaluations and clicking [Add a course evaluation](#).

Next: [enter historic academic records...](#)

2.10 Step Ten: Enter Historic Academic Records

Home My Profile My Courses Admin Academics Campus Life Communications Advising Admissions Search

Bluto Blutarsky #1963000005

Activity Feed Info **Student** Campus Life Admissions Financial

Export Grade Report | Print Enrollment Verification | Lock Registration | Lock Grades/Transcript

Transcript Degree Audit Term Info Course Mapping

Transcript Actions

Student Information edit

Student ID 1963000005
Advisor None
Go to advisee page
Proctoring Not required
Campuses None

Cumulative

Attempted Credits	Earned Credits	Points	Cumulative GPA
8.00	0.00	0.00	0.00

Fall 1980-1981

Course	Name	Atmp. Credits	Ern. Credits	Grade	Points
ENG 109	Introduction to Radical English Professors	4.00	0.00	W	--
GRE 101	Introduction to Greek	4.00	0.00	W	--

Courses

Show Fall 1980-1981

ENG 109: Introduction to Radical English Professors W
GRE 101: Introduction to Greek W

English
Send Text (209) 888-7443
Roles Student Edit roles
Custom Tabs

If your previous system did not store your school's information in a database format, then it couldn't be imported into Populi during implementation. If you'd like to store your historic records in Populi, you'll need to enter them by hand. This tutorial walks you through the best approach to that process.

Keep in mind that this can be a lengthy process, so it is best to first set up your current terms so your school can get the most out of Populi from the get-go.

Why you should enter historic data

Historic academic data has several uses, and though your old system may not have made it possible to bulk-import it into Populi, it's worth your while to enter it manually. Among other things...

- Keeping *all* of your data in Populi will let you jettison outdated software.
- It will help you clean up errors and omissions from your previous system.
- Past students might need a transcript from you.
- It's included in the price your school pays for Populi!

What you should enter and what you shouldn't

When entering historic records, you are, in essence, building historic student transcripts. Accordingly, the process involved in entering historic data follows similar steps to those you take when you're setting up current or future academic terms. Here are the items you'll be focusing on:

1. Setting up [past academic years and terms](#).
 2. Adding the courses you [offered in those terms](#) (if necessary, you may need to first add retired courses to your [course catalog](#)).
 3. [Recording student enrollments and audits](#) in those courses.
 - Your historic students will need to have the student role temporarily activated in order to enroll them.
 - Make sure you have programs and degrees listed for your students to make sure their courses show up on their transcripts.
 - **Ask a Financial Admin user to set the *Start Generating Automatic Charges* setting to the term in which your school started using Populi.** If that setting isn't used, then Populi will start generating tuition charges for historic students as you enter historic enrollment data.
- Entering students' [final course grades](#).
 - Entering old [transfer courses](#).

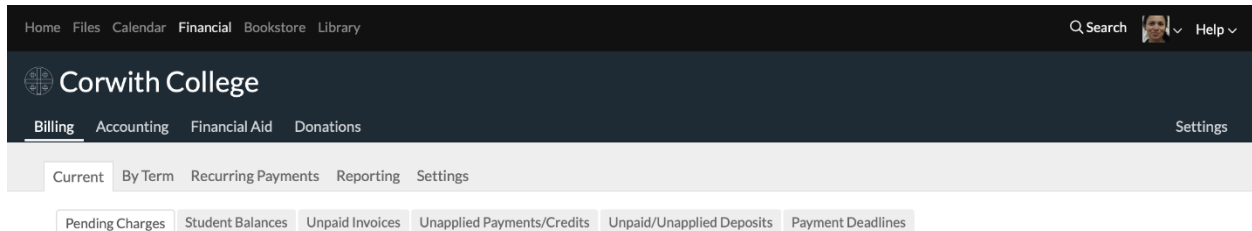
Here's the historic stuff you don't need to worry about:

- Degree audits
- Individual assignments, grades, and attendance
- Billing and financial aid information (but do remember that *Start Generating Automatic Charges* setting!)
- Admissions applications (save for transfer courses)

3. Populi Financial

- [Introduction to Populi Financial](#)
- [Step one: set up your Chart of Accounts](#)
- [Step two: set up your tuition schedules](#)
- [Step three: set up refund policies](#)
- [Step four: set up your fees](#)
- [Step five: set up meal and room plans](#)
- [Step six: set up your payment plans](#)
- [Step seven: set up check templates \(optional\)](#)
- [Step eight: set up online bill pay \(optional\)](#)
- [Step nine: set up your students' financial info](#)
- [Step ten: look over general Financial settings](#)
- [Setting up Enrollment Agreements](#)

Introduction To Populi Financial



Populi Financial lets you manage your school's Receivables and Donations. "Receivables" are the charges and payments involved when your students pay tuition and fees, incur library fines, buy stuff in your bookstore, and so on. Donations are individual monetary gifts made to your school by donors (as opposed to someone paying tuition on behalf of a student). Populi lets you track charges, payments, and donations so you can incorporate that information with your general accounting package (which might handle other tasks like payroll, capital expenditures, and so on).

Financial has four components:

- **Accounting**, which contains a Chart of Accounts, General Ledger, lets you perform Journal Entries, and gives you tools to examine individual financial transactions.
- [Billing](#), which lets you manage tuition, fees, and payment plans, and gives you reporting tools that track charges and payments.
- [Financial Aid](#), which lets you manage financial aid awards, manage student aid applications, disburse and refund aid, and gives you reporting tools to track awards and applications.
- [Donations](#), which lets you accept and acknowledge donations, communicate with donors, and run campaigns and appeals.

This overview covers the interactions among Accounting, Billing, and Financial Aid.

Accounting

Populi Financial is based on [double-entry accounting](#). Double-entry accounting is a self-balancing accounting method consisting of two-sided transactions that record where your money comes *from* and where it goes *to*. All financial events in Populi are tied to your Chart of Accounts, which is what you use to reconcile your Receivables with the rest of your school's finances.

Accordingly, when you first set up Populi Financial, you start in the Chart of Accounts. The Chart...

- Forms the underlayment of the movement of money in and out of your A/R.
- Is the focal point of Populi Financial: your goal is to end up with accurate balances in your Chart.

Financial events (transactions) are tied to the Chart by associating tuition, fees, payments, financial aid awards, bank accounts, etc. with specific accounts.

For example

- The "Accounts Receivable" asset account is built-in to your Chart (and cannot be removed—every transaction affects it in some way).

- Your "Technology Fee" of \$50 is tied to income account "5100 - Tuition and Fees".
- The "Tech Scholarship" is tied to liability account "10000 - Tech Scholarship Fund".
- Your school's bank account is tied to asset account "0100 - General Checking".

Say you charge a student the Technology Fee: that increases the balance on your A/R and Account 5100 by \$50 each. This means that you have an *Asset* (the student's obligation to pay you \$50) which takes the form of \$50 of *Income* to Account 5100.

Meanwhile, you award the student a "Tech Scholarship" of \$50. You run a Journal Entry that increases the balances of Account 0100 and Account 10000 by \$50 each. This means that you have an *Asset* (the funds from the scholarship) that is offset by a *Liability* (the obligation of those funds to pay the student's expense).

What happens when you use the Scholarship to pay the Fee?

- The balance in Account 0100 remains the same. The money already became a real asset in your bank account when you did the Journal Entry.
- Your A/R balance decreases by \$50. With the Fee having been paid, the *Asset* of the student's obligation to pay is now gone.
- Account 5100 remains unchanged. You can still book \$50 of *Income* to that account.
- The balance in Account 10000 is reduced by \$50. Now that the Scholarship has been disbursed, the *Liability* you once had toward the student is now gone.

The end result? \$50 has come in the door and you have an accurate record of how it got there.

Billing

For the day-to-day work of charging students and receiving payments, you'll use Financial > Billing.

In Billing, you set up Tuition, Fees, and Payment Plans. Each of these are tied to system triggers (some built-in, some that you set up) that automate charges. For example, a tuition schedule generates a pending charge when a student enrolls in courses. Once you're set up and charges and

payments start rolling in, you use the real-time reports in Billing (Pending Charges, Unpaid Invoices, etc.) to keep track of your ongoing financial activity and figure out what needs to happen next.

Charges begin in the *Pending* status, which means that they do not yet affect any account balances. They can be changed by hand or by events like enrollment updates, as well as be deleted. The one thing you cannot do with them is pay them—they do not affect any balances. To make the charges "payable", you have to *invoice* them. Invoicing creates a permanent record that the student owes you *this much for these reasons*.

The next thing an invoice needs to communicate is whether and how it was paid off. There are four ways to pay invoices in Populi:

- You record a payment (cash, check, whatever) on the student's profile (more below).
- You apply a credit towards the invoice.
- The student (or someone else) can pay online via credit card.
- A financial aid award can be disbursed in payment of aid-eligible charges (more below).

Invoices and payments create individual, unique transactions (as do other financial events, like refunds, credits, Bookstore sales, etc.). Transactions, technically speaking, exist at the Accounting level, and record the financial events that constitute an individual account's balance. Thus, your daily Billing activity can be reflected in your General Ledger and on your Chart of Accounts.

For example

- You set up an "Undergraduate" tuition schedule that charges part-time students \$650 per credit (less than 12 credits) and a flat rate of \$9700 for full-timers (12-18 credits).
- You link that tuition schedule to all of your Undergraduate courses.
- You create a refundable "Lab Fee" of \$150 for students that enroll in any Lab Science course; the above-mentioned "Technology Fee" is tied to the "Undergraduate" schedule.

Say you add a student to the Undergraduate program and he enrolls in six courses totaling 14 credits, including a 4-credit Lab Science course.

- When he's added to the Undergraduate program, that triggers the corresponding tuition schedule to be added to him.
- When he enrolls, the Undergraduate schedule triggers the \$9700 flat rate; this, in turn, triggers the \$50 Technology Fee.
- The Lab Science course, meanwhile, triggers the \$150 Lab Fee.

Thus, his charges total \$9,900, which you then invoice. The student now has a balance of \$9,900, which is reflected in your CoA as \$9,900 in A/R and income in "Tuition and Fees".

Financial Aid

To get started setting up Financial Aid, [begin here...](#)

Financial aid refers to the processes involved when a student makes use of a grant or loan from a funding agency to pay her education-related expenses at your school. (It does not refer to payments made by a third party—say, a student's uncle—on behalf of a student.) A funding agency might be the Federal government, a state government, or a scholarship fund (among other possibilities). Depending on what kind of aid your school accepts as payment, the financial aid process might be pretty simple or rather complex.

Read more in the [Introduction to Financial Aid](#).

***Read about other [financial basics](#) in Populi.
[Get started on setting up Populi financial.](#)***

3.2 Step One: Set Up Your Chart Of Accounts

Account	Name	Description	Type	Balance
1010	Cash in bank	Unrestricted currency, deposits, and equivalents	Asset	420,270.07
1110	Accounts receivable		Asset	596,174.64
34001212	Check & eCheck		Asset	108,292.50
34001213	Credit Cards		Asset	122,344.07
80099-5997	Petty Cash Admin Office		Asset (Cash)	0.00
89-66354	FWS Funds		Asset	(-2,060.37)

Before doing anything else with Populi Financial, you need to set up your Chart of Accounts. The Chart of Accounts lists your school's financial accounts that are connected with your accounts receivable (and any donations you're taking through Populi).

Populi includes a number of built-in accounts. They include some standard asset, income, and liability accounts to help you get going right away. You're free to modify them as necessary and add new accounts.

Adding an account

Your Chart of Accounts in Populi should include any accounts that affect your school's receivables. This would include liability accounts for financial aid awards, income accounts for special fees or donations, asset accounts for different payment types, and so on.

Add Account [X]

Account

Name

Description

Type

Sub Type

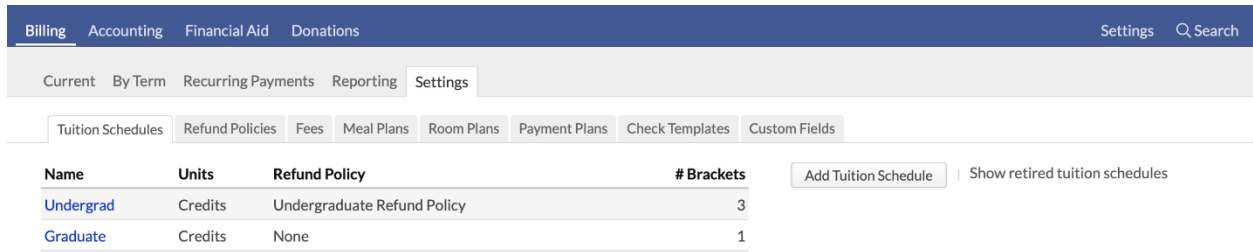
[Save]

1. Click **Add Account**.
2. Enter the account—this can be a number, abbreviation, a nickname...
3. Enter the name; this is the official full name of the account (e.g. Graduate Income, Dorm Fees, Corinne Fox Scholarship, etc.).
4. Select the account type. Your five options are *Asset*, *Income*, *Liability*, *Expense*, and *Equity*.
5. Click **Save** to create the account.

Read more about [Accounting](#).

Next: [Set up your tuition schedules...](#)

3.3 Step Two: Set Up Your Tuition Schedules



The screenshot shows a software interface with a dark blue header containing navigation links: Billing, Accounting, Financial Aid, Donations, Settings, and Search. Below the header is a sub-header with tabs: Current, By Term, Recurring Payments, Reporting, and Settings. Underneath are more tabs: Tuition Schedules, Refund Policies, Fees, Meal Plans, Room Plans, Payment Plans, Check Templates, and Custom Fields. The main content area displays a table with the following data:

Name	Units	Refund Policy	# Brackets
Undergrad	Credits	Undergraduate Refund Policy	3
Graduate	Credits	None	1

Buttons for 'Add Tuition Schedule' and 'Show retired tuition schedules' are visible to the right of the table.

Tuition schedules let you automate tuition charges for course enrollments. Here's how they work:

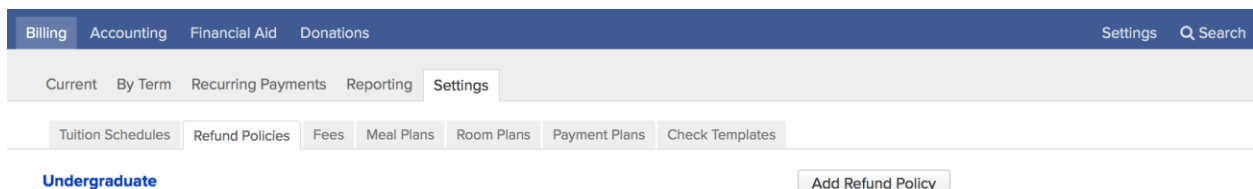
1. You create a tuition schedule, specifying how to charge students within the schedule's brackets. You can also include a [refund policy](#).
2. You add the schedule to a student account. There are a number of ways to do this.
3. When the student enrolls in courses, a pending tuition charge is created.
4. After reviewing the pending charges, you invoice them.

Tuition schedules cover course *enrollments*, and so won't capture auditors. To set up an automatic charge for auditors, [create an auditor fee](#).

Whether or not we imported data for you, you'll need to set up your tuition schedules from scratch when you begin setup. Start by going to Billing > Settings > Tuition Schedules and clicking **Add Tuition Schedule**. Read more about setting up [Tuition Schedules](#).

Next: [Set up refund policies...](#)

3.4 Step Three: Set Up Refund Policies



The screenshot shows a software interface with a dark blue header containing navigation links: Billing, Accounting, Financial Aid, Donations, Settings, and Search. Below the header is a sub-header with tabs: Current, By Term, Recurring Payments, Reporting, and Settings. Underneath are more tabs: Tuition Schedules, Refund Policies, Fees, Meal Plans, Room Plans, Payment Plans, and Check Templates. The main content area displays a table with the following data:

Name	Units	Refund Policy	# Brackets
Undergraduate	Credits	Undergraduate Refund Policy	3
Graduate	Credits	None	1

A button for 'Add Refund Policy' is visible to the right of the table.

Refund Policies automatically calculate refunds for invoiced charges when a student withdraws from courses. Here's how they work:

1. You create a refund policy, specifying refund details within the policy's brackets and other options.
 2. You add the policy to a student account, whether on an [individual student's profile](#), or by making it the default for a particular [tuition schedule](#).
 3. The student enrolls in courses, generating tuition charges (and other fees). You invoice those charges.
 4. At a certain point in the term, the student withdraws from some or all of his courses.
 5. When the withdrawal occurs, if it's within the timeframe of the refund policy, a pending credit is created for the refundable charges (tuition and any fees marked *refundable*).
- Refunds are only calculated for charges that were generated by a tuition schedule or fee rules. If you manually add a fee, the refund policy won't catch it.

- You then invoice those credits, and either apply them to the student's charges or record an outgoing payment.

Refund Policies, whether or not we imported data for you, will be empty when you begin setup. Start by going to Billing > Settings > Refund Policies and clicking **Add Refund Policy**. Read more about [setting up refund policies](#).

Next: [Set up your fees...](#)

3.5 Step Four: Set Up Your Fees

Billing Accounting Financial Aid Donations								Settings	Search
Current		By Term	Recurring Payments	Reporting	Settings				
Tuition Schedules	Refund Policies	Fees	Meal Plans	Room Plans	Payment Plans	Check Templates	Custom Fields		
Add Fee		Show retired fees							
Name	Type	Max Amount	Amount	Refundable	Fin. Aid Applies	1098-T	Account	Is Deposit	
Application Fee	Flat		42.50	No	No	No	5181: Fees		
Asset fee	Flat		122.30	Yes	Yes	Yes	1010: Cash in bank	Yes	
Audit Fee (Delayed)	By Course	250.00	175.00	Yes	No	Yes	5181: Fees		

Fees are non-tuition items which you charge your students for some aspect of their education or college life. Here's how they work:

1. You create a fee, the details of which determine how it applies to student accounts.
2. You can add optional fee rules, which let you automate the application of the fee when certain criteria are met.
3. The fee is added as a pending charge to a student's account—whether because it was triggered by a Fee Rule or it is manually-added.
4. Finally, the fee is invoiced.

Fees have several settings that determine how and to whom they apply:

- Flat rate fees charge the same amount every time. Per course/credit/hour fees charge a graduated amount depending on the student's enrollment.
- Refundable fees return all or a portion of the charge to the student when he withdraws from courses; the fee refund is based on the refund policy of the student's tuition schedule.
- Financial aid-eligible fees can be covered by financial aid awards. Other fees require a customer payment of some kind.
- Fee rules apply the fee to students who trigger it by some event elsewhere in the system. Fee rules can be based on custom info, enrollment, particular degrees, and so on.

Whether or not we imported data for you, you'll need to set up your fees from scratch when you begin setup. Start by going to Billing > Settings > Fees and clicking **Add Fee**. Read more about [Setting up Fees](#).

Next: [set up meal and room plans...](#)

3.6 Step Five: Set Up Meal And Room Plans

Billing			Accounting	Financial Aid	Donations	Settings	Search
Current		By Term	Recurring Payments	Reporting	Settings		
Tuition Schedules	Refund Policies	Fees	Meal Plans	Room Plans	Payment Plans	Check Templates	Custom Fields
Name	Account	Amount	<input type="button" value="Add Room Plan"/>				
Double Room	5183: Board	3,450.00					

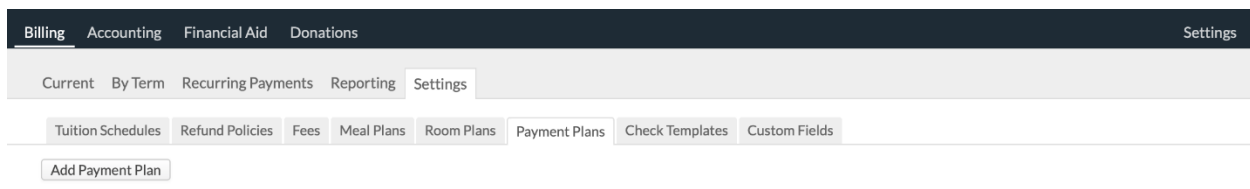
Meal plans and room plans let you add boarding plans and charges to student accounts. They're simple to set up: just create a name, choose an account, and enter an amount. After creating these boarding plans...

- You can link room plans to student housing in [Campus Life > Settings](#).
- You can add boarding plans to student accounts on both [Profile > Financial > By Term](#) and [Profile > Campus Life](#).

Whether or not we imported data for you, you'll need to set up room and meal plans from scratch when you begin setup. Start by going to Billing > Settings > Meal Plans or Room Plans and clicking **Add Plan**. Read more about [Meal and Room Plans](#).

Next: [set up payment plans...](#)

3.7 Step Six: Set Up Your Payment Plans



Payment plans allow students to pay their invoices in installments. You can set them up in any number of ways—whether to account for financial aid, which kinds of charges to include/exclude... among many others—and can accommodate a variety of payment schedules. Here's how they work:

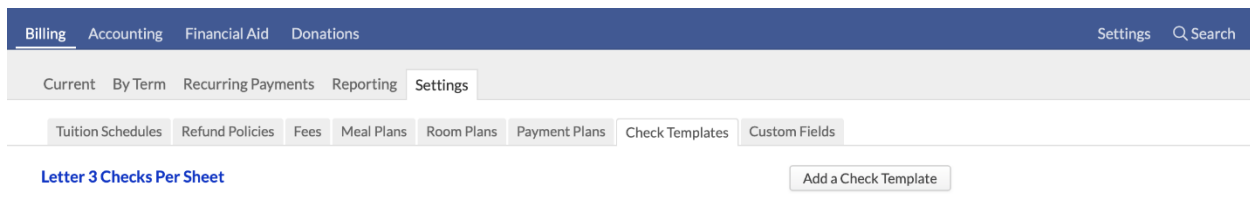
1. You create a plan in Financial > Settings > Payment Plans.
2. You add the plan to individual students on Profile > Financial (either Dashboard or By Term). (If you've enabled the *Online* setting, students can also pick a plan when they set up a recurring payment.) You can also put individual invoices on a plan.
3. The plan creates a payment schedule for the student's invoices included in the plan. You can recalculate the scheduled payments or change the payment schedule at any time.

4. You can keep track of your students' payment plan activity on [Billing > Current > Payment Deadlines](#)

Whether or not we imported data for you, you'll need to set up Payment Plans from scratch when you begin setup. Start by going to [Billing > Settings > Payment Plans](#) and clicking **Add Payment Plan**. Read more about setting up payment plans [in this article](#).

Next: [set up check templates](#) (optional), [set up online payments](#) (also optional); or you can skip those and jump right into [setting up financial info for your students...](#)

3.8 Step Seven: Set Up Check Templates (Optional)



Check templates let you set up a layout for printing student refund checks right from Populi. After setting up the template, you can use it to print individual [credit balance refund](#) checks or a batch of checks on [Billing > Current > Student Balances](#).

Creating a check template

When you first look at the check templates view, you'll see a link in the right column that lets you instantly create a pre-built 3-checks-per-page template. Click that, or...

1. Click **Add a Check Template**.
2. Give the template a name—the check paper type would be a good move.
3. Click **Save**.

As soon as you save, you'll be taken to the template editor page.

Editing the template

Letter 3 Checks Per Sheet [edit](#)

Page Layout

Page Width: 8.5 in. | Page Height: 11 in. | One Cell Per Page: No
Num. Rows: 3 | Num. Columns: 1 | Cell Width: 8 in. | Cell Height: 3 in.
Top Margin: 0.5 in. | Left Margin: 0 in. | Space Btw. Rows: 0.5 in. | Space Btw. Columns: 0.5 in.

[edit](#)

[Print Preview](#)

[Delete Template](#) | [Clone Template](#)

Fields

[add](#)

Background Image

File: [check_bg.jpg](#)

Width: 8 in. | Height: 3 in. | Top Position: 0 in. | Left Position: 0 in. [edit](#)

Text

{!PAYEE_FIRST_NAME!} {!PAYEE_LAST_NAME!}

Font size: 12pt | Font style: Regular | Alignment: Left

Width: 5 in. | Height: 0.3 in. | Top Position: 1.15 in. | Left Position: 1.2 in. [edit](#)

Preview



Check templates require you to define two areas:

- **Page layout** refers to the overall dimensions of the check sheet and the size and arrangement of the individual checks. You can usually get these dimensions from the check manufacturer. These dimensions determine where exactly your printer will lay down the ink.
- **Fields** are the blocks of information included on each check. These items have to be arranged so that they fit on one, single printed check.

To edit the page layout dimensions:

1. Click **edit** next to Page Layout.
2. Enter or edit values for the fields you need to change. The cell width and height determine the overall dimensions you'll be using for your check fields.
3. If this is a template for a single check, make sure to check *one cell per page* (leave unchecked if this is a sheet of checks).
4. Click **Save** when you're done.

Fields

check fields let you specify the check's content and appearance.

1. Click **add** next to Fields.
2. Choose whether this is a *Text* or *Background Image* field. You can only have one image field per check template.
3. Enter your content. You can include variables like check number, payee name etc. You can also type text. Format the content with font size, color, and alignment.
4. Enter the width and height in inches; you can use up to four decimal places (e.g. 1.6225). Make sure these fit inside the cell width/height!
5. Likewise, enter top and left position in inches (up to four decimals...). These fields will probably take some finessing—as you work with the template, scroll to the bottom of the page to see the preview.
6. Click **Save**.
7. You'll see the field in the preview at the bottom of the screen. If you need to adjust a field, hover over it and when you see the blue highlight, click it.

Previewing

As you save your check fields, you'll see a preview at the bottom of the screen. Provided your monitor is not set up with some strange configuration, the preview is roughly the size of the actual printed check. The preview will help you make tweaks and adjustments to your check fields and their positions relative to one another.

- Click **Print Preview** to test your check template with some sample data.
- **Clone template** lets you create a new check template based on the one you're working with.

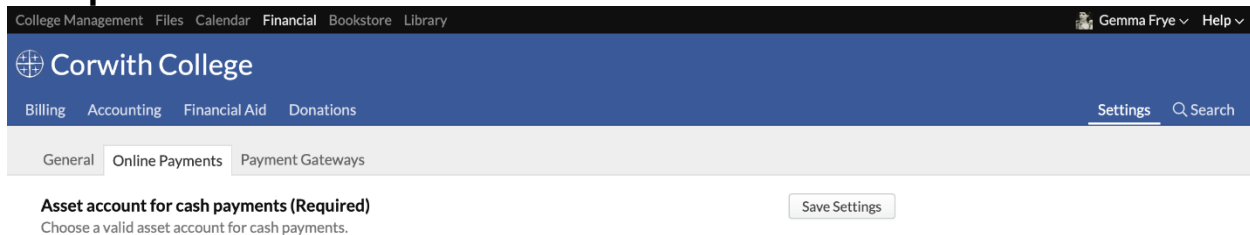
Next: [set up online payments](#) (optional); or you can skip that and jump right into [setting up financial info for your students...](#)

3.9 Step Eight: Set Up Online Bill Pay (Optional)

If you set up online payments through Populi, you can accept payments for tuition, fees, books, applications, and donations via credit card and electronic check/ACH. Populi works with two payment processors:

- [Stripe](#) is a complete payment solution, serving as both merchant account and payment gateway. It takes around five minutes to set up a new Stripe account and connect it with Populi. [Its pricing](#) is better than just about anything out there—and it has no setup, monthly, or card storage fees. All things considered, we think Stripe is the best option for Populi customers.
- [Authorize.net](#) provides an assortment of payment services.
 - Their gateway/merchant account solution is comparable to Stripe (both features and price), but includes some extra fees.
 - Their payment gateway works with almost every merchant account out there. If you wish to keep your existing merchant account (or open a new one) Authorize.net's payment gateway will (probably) let you do that.
- Non-profit institutions can get discounted pricing for Authorize.net by signing up for it through [Moolah](#).

Setup



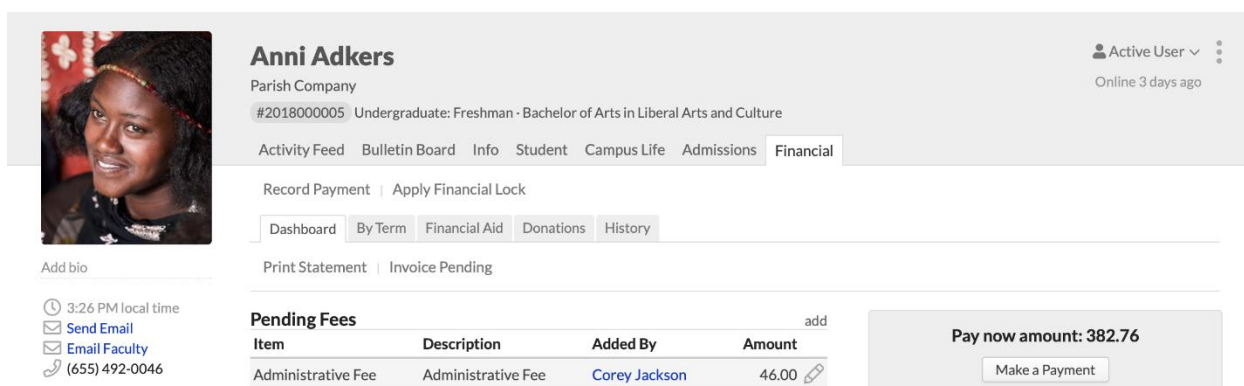
The screenshot shows the 'Setup' page for 'Online Payments' in the Corwith College financial system. The page has a dark blue header with the college logo and name. Below the header is a navigation menu with 'Billing', 'Accounting', 'Financial Aid', and 'Donations'. The 'Settings' link is highlighted. The main content area shows the 'Online Payments' tab selected, with sub-tabs for 'General' and 'Payment Gateways'. A section titled 'Asset account for cash payments (Required)' is visible, with a 'Save Settings' button to its right.

Start by going to Financial > Settings > Online Payments. After filling in those settings, you'll go to Settings > Payment Gateways to set up your Stripe account or connect your Authorize.net account to Populi.

Read more about [setting up online payments...](#)

Next step: [get your students' financial info set up...](#)

3.10 Step Nine: Set Up Your Students' Financial Info



The screenshot shows a user profile for 'Anni Adkers' with a profile picture of a young woman. The page is titled 'Anni Adkers' and includes the following information:

- Parish Company
- #2018000005 Undergraduate: Freshman - Bachelor of Arts in Liberal Arts and Culture
- Navigation tabs: Activity Feed, Bulletin Board, Info, Student, Campus Life, Admissions, Financial (selected)
- Actions: Record Payment, Apply Financial Lock
- Sub-navigation tabs: Dashboard (selected), By Term, Financial Aid, Donations, History
- Print Statement, Invoice Pending
- Contact info: 3:26 PM local time, Send Email, Email Faculty, (655) 492-0046
- Pending Fees** table:

Item	Description	Added By	Amount	add
Administrative Fee	Administrative Fee	Corey Jackson	46.00	

Pay now amount: **382.76**

Make a Payment

There are a variety of ways to manage student financial information. Here's an overview of where you'll perform many common tasks:

Dashboard

The Profile > Financial > Dashboard shows an overview of the student's financial information—including invoices, payments, transactions, deposits, and tax forms. Because it combines "term agnostic" info with term-specific info, it presents a fairly complete picture of the student's financial activity. Key workflows here include:

- [Adding and invoicing charges](#)
- [Recording customer payments](#)
- [Issuing refunds](#)
- [Adding financial locks](#)
- [Managing the default tuition schedule](#)

By Term

Profile > Financial > By Term shows all financial information connected to a student in a given term—including charges, enrollment history, tuition schedule, refund policy, payment plan, and more.

Key workflows here include:

- [Managing tuition schedules, refund policies, and other items](#)

- [Adding and invoicing charges](#)
- [Charging tuition and fees](#)
- [Printing statements](#)

Financial Aid

Profile > Financial > Financial Aid shows the student's [aid application](#) and [aid awards](#). Make sure you've walked through [Financial Aid setup](#) before you do anything here!

History

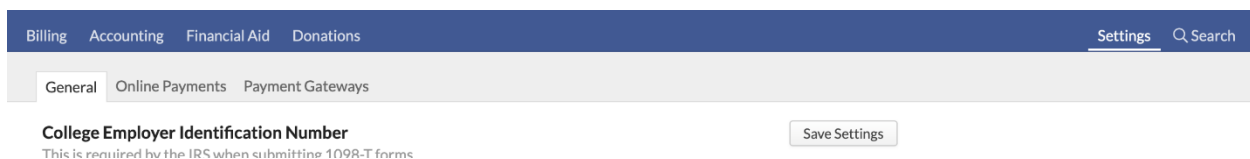
Profile > Financial > History collects all of a student's transactions, starting with the most recent at the top.

- Use the filter to see transactions of a particular type.
- Click the *transaction #* link to see the transaction page.
- Click the *reference* link to see the associated invoice or payment detail.

Next: Look over your [general financial settings](#).

3.11 Step Ten: Look Over General Financial Settings

Now that you've set up Populi Financial, you should take a few minutes to look over general Financial settings. These settings cover a wide variety of miscellaneous billing, accounting, and financial aid functions.



Keep in mind that you've also laid some of the setup groundwork for [Financial Aid](#), [Donations](#), and [Bookstore](#).

To get started, click the main Settings view on the right of the screen. Most of the settings on this page explain how they will affect your use of Populi's financial functions; below you'll find further explanation of certain, more complicated settings.

Federal Work Study Account

Select an asset account in which FWS funds will reside in while at your school. See [this article](#) for the full FWS workflow.

Start Generating Automatic Charges

Select a term as of which you wish to begin generating charges. This setting prevents pending charges from being inadvertently generated in past terms (which can happen when you're adding or updating historical academic information). It's best to choose the first term in which you'll be testing or implementing Populi Financial.

"Pay Now" Cutoff

Enter a number of calendar days. Charges due within this number of days will be counted in the "Pay Now" amount on a student's Financial Dashboard. Charges due past this number of days will not be counted. For example:

- You enter 30 in this field.
- John Adams has \$150 due on August 15 and \$450 due on September 15.
- On August 12, John's "Pay Now" amount is \$150. The \$450 due in September is thus far excluded from the "Pay Now" amount.
- He misses the payment deadline by a few days and next logs in on August 18. His "Pay Now" amount is now \$600: the \$150 that's overdue plus the \$450 due in September—which now fits within the 30-day cutoff you set up.

If you wish all charges to be counted in the "Pay Now" amount, leave this field blank.

Consider uncollectible invoices in Pay Now

Select "Yes" to include the unpaid portion of invoices marked "uncollectible" in the "Pay Now" amount. [This article](#) describes how this setting affects uncollectible invoices.

Default Invoice Due Dates

When creating an invoice, how many days in the future would you like the default due date to be?

For example, if your school has a net 30 policy, enter 30 to default to invoice due dates that are 30 calendar days away. You can always edit any invoice due date after it is created.

Enrollment Agreements

Read about Enrollment Agreements [in this article](#).

Financial Lock Period

Read about how to use financial lock periods [in this article](#).

4. Admissions

[Follow](#)

Set up your admissions users, lead routing, online inquiry and application forms, and other items that will let you use Populi to manage your school's entire admissions process.

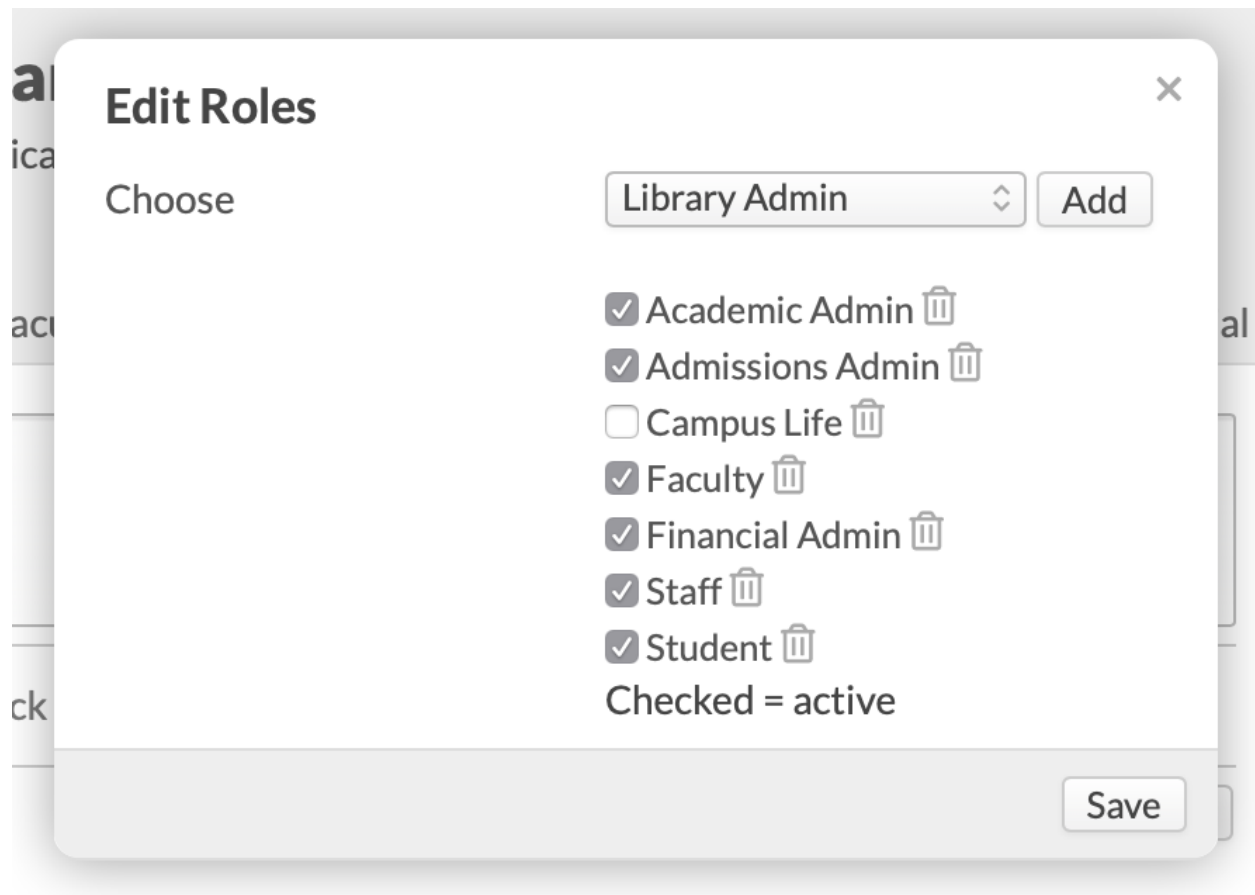
- [Step one: get your Admissions staff set up with the right user roles](#)
- [Step two: set up custom admissions fields](#)
- [Step three: set up your lead sources](#)
- [Step four: set up Lead Routing](#)
- [Step five: set up one or more inquiry forms](#)
- [Step six: set up one or more applications](#)
- [Step seven: set up one or more communication plans](#)
- [Step eight: review additional admissions settings](#)

4.1 Step One: Get Your Admissions Staff Set Up With The Right User Roles

First things first: you and your admissions staff will need the correct user roles to use Populi Admissions. There are five user roles that, to varying degrees, can access Admissions or Admissions-related features: Admissions Admin, Admissions, Academic Admin, Registrar, and Staff.

Read about [granting user roles](#), and see the list below for user roles that have some sort of access to Admissions.

*In order to perform the tasks described in this Getting Started guide, you'll need the **Admissions Admin** role.*



Admissions Admin

Admissions Admins have access to all admissions information at your school. They have unique access to Admissions > Settings; this includes application design, lead routing, inquiry form settings, and custom admissions fields.

Admissions Admin users are automatically given the [Staff](#) role; additionally...

- They have full read/write access to everything under Home *except* the Academics view.
- They can't enroll in or teach courses.
- They have full read/write access to all information on Profiles in the Activity Feed, Info, and Admissions views. They can see a faculty user's Faculty view.
- They can give others the Admissions, Student, and Staff roles.

Admissions

Admissions users have access to all admissions information at your school, *except for* Admissions > Settings.

Admissions users are automatically given the [Staff](#) role; additionally...

- They have full read/write access to everything under College Management *except* the Academics view.
- They can't enroll in or teach courses.
- They have full read/write access to all information on Profiles in the Activity Feed, Info, and Admissions views. They can see a faculty user's Faculty view.
- They can give others the Admissions, Student, and Staff roles.

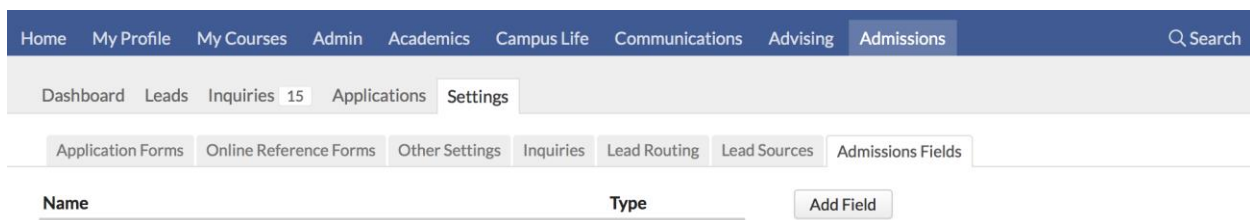
Other roles

The Academic Admin and Registrar roles have the same access to admissions information as the Admissions role.

Next step: [set up custom admissions fields](#)

4.2 Step Two: Set Up Custom Admissions Fields

Custom admissions fields let you track additional information about your Leads. Add them to Leads on Profile > Admissions > Custom Info. After adding it to a lead, it will be available in the various reports in Admissions.



The screenshot shows a navigation bar with the following items: Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, Admissions (highlighted), and a search icon labeled 'Search'. Below the navigation bar is a sub-menu with: Dashboard, Leads, Inquiries 15, Applications, and Settings (highlighted). Under the Settings menu, there are several options: Application Forms, Online Reference Forms, Other Settings, Inquiries, Lead Routing, Lead Sources, and Admissions Fields (highlighted). At the bottom of the screenshot, there is a table with two columns: 'Name' and 'Type'. To the right of the table is a button labeled 'Add Field'.

Don't use custom fields to record information that Populi already tracks. This results in duplicate, inconsistent, and/or missing information. Only create a custom field once you are sure Populi's standard fields cannot store the information you need!

Adding a new field

The screenshot shows a modal window titled "Add Field" with a close button (X) in the top right corner. The form contains the following fields and options:

- Input:** A dropdown menu with "Radio" selected.
- Name:** A text input field containing "Student Pledge Agreement".
- Description:** A text area containing "Student agrees to the Corwith College Student Code of Academic and Personal Conduct."
- Value:** A text input field containing "No" and an "Add" button. Below it is a list box containing "Yes" (with a three-dot menu icon to its left). A context menu is open over the "Yes" item, showing "Retire" and "Remove" options.
- Sort Values in Alphabetical Order:** A checkbox that is currently unchecked.
- Data Permissions:** A dropdown menu with "Editable By Profile Owner" selected.

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

To get started, go to Admissions > Settings > Admissions Fields.

1. Click **Add field**.
2. Select the *Input*. Your options are:

- Integer or Decimal: *Integer* creates a number-entry field. *Decimal* creates a number-entry field that accepts decimals. These inputs *reject* regular text—letters and punctuation.
 - Text: Creates a 255-character text-entry field that accepts letters, numbers, and punctuation.
 - Select: Creates a list of options to choose from a drop-down menu. Type the options in the Value field and click Add to list them.
 - Date, Date/Time: *Time* creates Populi's standard month, day, and year fields. *Date and Time* includes an additional standard time field.
 - Checkbox: Creates a list of options. Checkbox lists let you select one or more options from a list. Type the options in the Value field and click Add to list them.
 - Radio: Creates a list of options. Radio lists let you select only one option from a list. Type the options in the Value field and click Add to list them.
 - File/Multiple Files: Creates a custom file upload space.
 - Text Area: Creates a 5,000-character text-entry field that accepts letters, numbers, and punctuation.
- Give the field a name (required) and a description (optional).
 - For the input types that require options, type the options one-by-one. Click *...alphabetical* to show them to the end-user in alphabetical order. Otherwise, they'll remain in the order in which you enter them here.
 - When you're done, click **Save**.

Next steps: [set up your lead sources](#)

4.3 Step Three: Set Up Your Lead Sources

Lead Sources let you track where your leads learn about your school. Identifying productive sources can help you decide where to focus your recruiting efforts. You can associate sources with inquiry and application forms and get solid information on how exactly your leads are learning about and connecting with you.

Home My Profile My Courses Admin Academics Campus Life Communications Advising Admissions Search

Dashboard Leads Inquiries 15 Applications Settings

Application Forms Online Reference Forms Other Settings Inquiries Lead Routing Lead Sources Admissions Fields

Show Active Add a Source

Source	Type	Status	Source Types	add
Banner Ad	Advertisement	Active	Advertisement Conference	

Source types

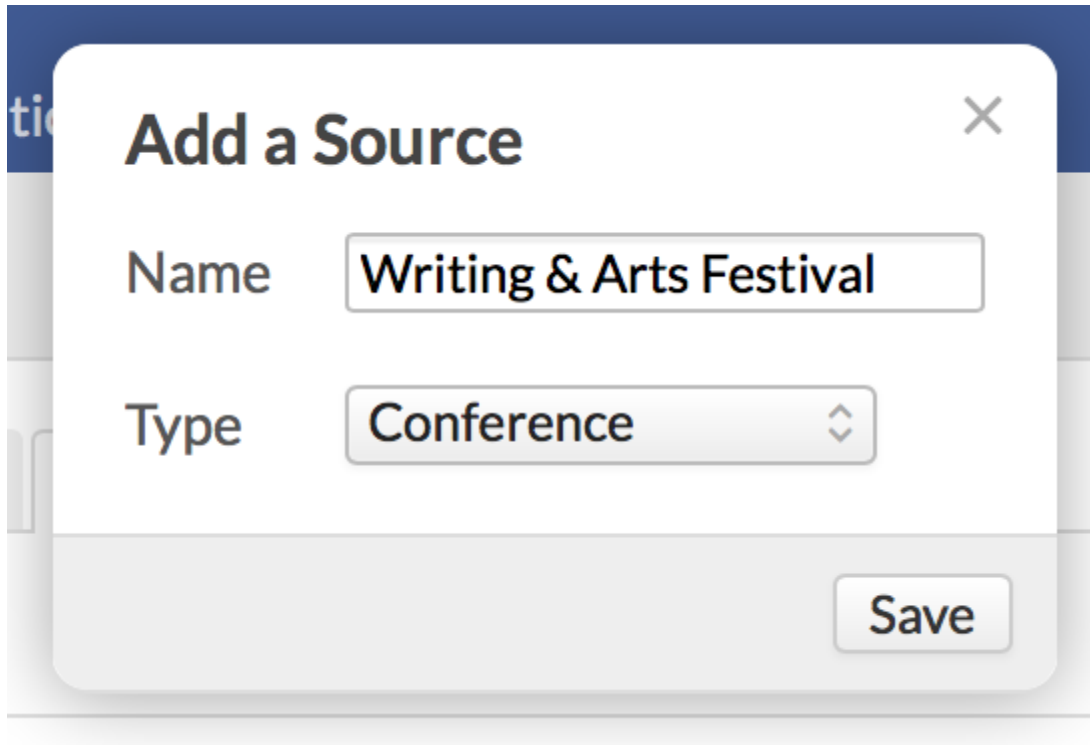
First, you create source types—these are big-picture sources which you use to categorize individual lead sources. For example, you might have an "Online" source type under which you place sources like "Facebook Campaign" and "Website Banner Ad".

To get started, head to Admissions > Settings > Lead Sources.

1. In the right column, click **add** next to Source Types.
2. Give the type a *Name*. Remember—these are big-picture categories...
3. Click **Save**.

Lead sources

After adding source types, you can start adding individual lead sources. You can do this as often as you need to.



Add a Source ×

Name

Type

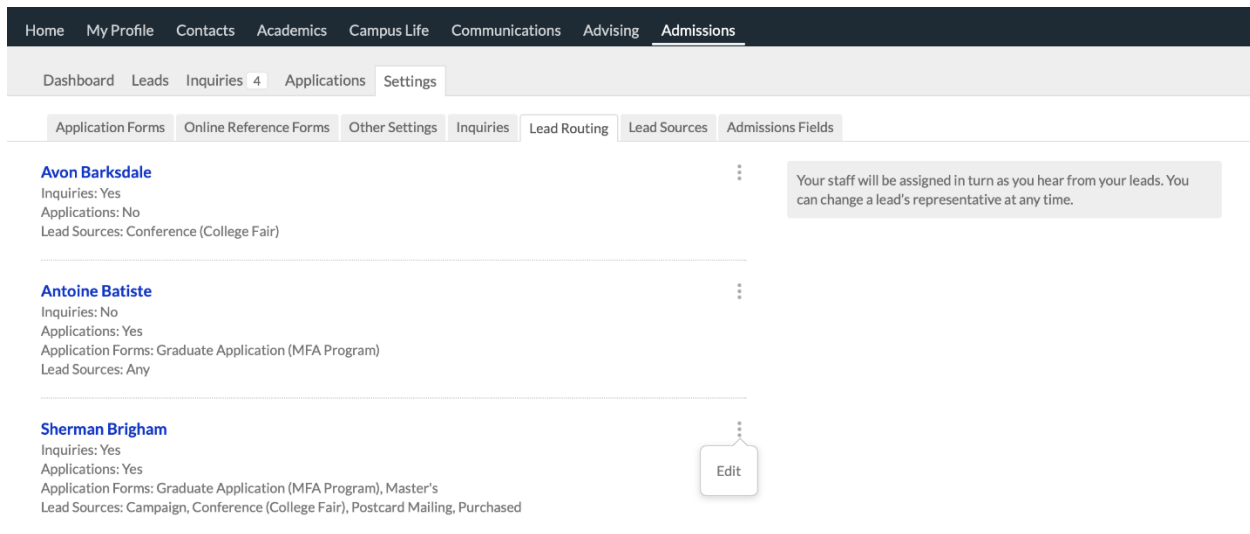
Save

1. At the top of the left column, click **Add source**.
2. Give the source a *Name*.
3. Select the source *Type*.
4. When you're done, click **Save**.

In the course of time, you'll come back here to add new types and sources and retire old ones. To retire either a type or a source, click its name; in the dialog, check next to *Retire*.

Next steps: [set up Lead Routing...](#)

4.4 Step Four: Set Up Lead Routing



Home My Profile Contacts Academics Campus Life Communications Advising **Admissions**

Dashboard Leads Inquiries 4 Applications Settings

Application Forms Online Reference Forms Other Settings Inquiries **Lead Routing** Lead Sources Admissions Fields

Avon Barksdale
Inquiries: Yes
Applications: No
Lead Sources: Conference (College Fair)

Antoine Batiste
Inquiries: No
Applications: Yes
Application Forms: Graduate Application (MFA Program)
Lead Sources: Any

Sherman Brigham
Inquiries: Yes
Applications: Yes
Application Forms: Graduate Application (MFA Program), Master's
Lead Sources: Campaign, Conference (College Fair), Postcard Mailing, Purchased

Your staff will be assigned in turn as you hear from your leads. You can change a lead's representative at any time.

Edit

Lead Routing lets you automatically assign admissions representatives (someone with the Admissions or Admissions Admin role) in turn to each inquiry or application that comes in through your external Inquiry or Application forms. When a representative is assigned an inquiry or application, Populi will [email them a notification](#) about it; the report filters in Admissions will also default to show them leads that are assigned to them.

To get started, go to Admissions > Settings > Lead Routing.

Read more about assigning admissions representatives [in this article](#).

Next step: [set up one or more Inquiry forms](#)

4.5 Step Five: Set Up One Or More Inquiry Forms

Inquiry forms are embeddable forms you can include in any kind of web property—your website, an email newsletter, Facebook page, and so on. You can link them to different lead sources and use custom CSS to make them match the look and feel of your own site. You can also just use the form as-is... but it's definitely gonna be more useful to your overall admissions strategy if you embed it in another page.

Home My Profile My Courses Admin Academics Campus Life Communications Advising Admissions Search

Dashboard Leads Inquiries 15 Applications Settings

Application Forms Online Reference Forms Other Settings Inquiries Lead Routing Lead Sources Admissions Fields

Embed Code Save Settings

Select a source... Select a program...

When entering settings in Admissions > Settings > Inquiries, you'll be determining the various ways you'll be able to use your inquiry forms to collect information.

- Inquiry forms include a [visual captcha panel](#) that appears only when there is a suspicious level of traffic hitting a particular form. The vast majority of times, your inquiries will not see it.

Embed code

1. Select one of your Lead Sources from the drop-down. If you're collecting field of study information from the Inquiry form (see below), select a Program as well.
2. When you do that, the embed code in the text area will modify itself to reflect your selections.
3. Copy and paste the embed code into the html of the page in which you'd like to include the form.
4. You can also preview the form by clicking the link below the text area.

Address fields

By default, the inquiry form includes fields for first and last name, email address, phone, and a brief message. Check **Yes** to include fields for street, city, state/province, and country.

Course of study

Check **Yes** to include fields for degree, specialization, and the academic term the inquirer wishes to begin attending. The academic terms available to inquirers will be the same ones you've listed for your [application forms](#) (so if you haven't listed any terms for your applications, inquirers will not be able to pick an academic term on the inquiry form).

Custom CSS

Enter CSS in the text area to give the inquiry form (including the inquiry message page... see below) a similar look and feel to the website in which you're embedding it. This setting will affect how your form looks and functions, so make sure you double-check your code before putting it out there!

Inquiry message

Enter a brief message. When the inquirer submits the form, this message will display. Something brief and friendly works—e.g. *Thanks for inquiring! We'll be in touch with you soon to answer your questions...*

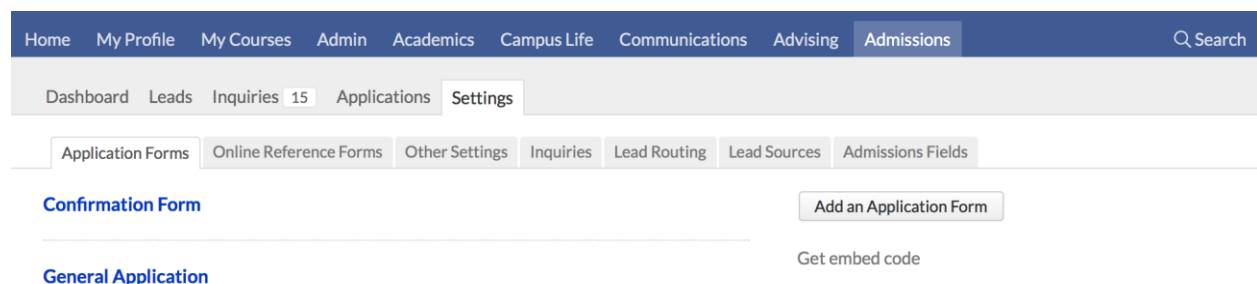
Inquiry form redirect

After submitting the form, the inquirer is taken to a built-in *Thank You* page (which displays whatever you've entered in the *Inquiry Message* setting. You can also redirect the inquirer to another web page. Enter the URL of the page to which you'd like to send the inquirer, and after seeing the inquiry message, he'll be taken to the URL you enter here.

Next step: [create one or more application forms](#).

4.6 Step Six: Set Up One Or More Applications

Application forms let you collect the information, files, and other details you need from your leads to determine whether they may enroll at your school. You can have multiple applications; each application may be associated with a different academic program, academic term, application fee, as well as other settings. Applications can be embedded on other websites and, like inquiry forms, be connected to particular lead sources to help you track how people learn about your school.



The screenshot shows a web application interface for Admissions. At the top is a dark blue navigation bar with links: Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, Admissions, and a search icon. Below this is a light gray sub-navigation bar with links: Dashboard, Leads, Inquiries (15), Applications, and Settings (highlighted). Underneath is a white navigation bar with links: Application Forms (highlighted), Online Reference Forms, Other Settings, Inquiries, Lead Routing, Lead Sources, and Admissions Fields. The main content area shows a section for 'Confirmation Form' with a blue link and a 'Get embed code' button. Below that is a section for 'General Application' with a blue link and a 'Get embed code' button.

To get started, go to Admissions > Settings > Application Forms.

1. Click **Add an application form** to start a new form.
2. First you'll establish the application form's [settings](#)—how will the form behave, to whom will it be available, will there be a fee to apply, and so on.
3. After than, you'll [design the application](#): adding questions, setting up fields and references, and organizing with sections headings and text.

Next step: [set up one or more communication plans](#)

4.7 Step Seven: Set Up One Or More Communication Plans

Communication Plans let you set up the same communications workflow for each lead you put on the plan. Plans are comprised of letters, emails, and to-dos and have a number of timeframe options. For example, you can schedule a "Welcome to YourCollege Admissions" email after initial contact, then an introductory letter to accompany an information packet via snail mail, and then a number of follow-up tasks to help coax the lead into applying.

Name	Added By	Added	Delete
Donation Follow-up	Donald Theriault	Feb 14, 2019 11:41am	

Communications and activities are tracked on the lead's Profile > Activity Feed, in Communications > Scheduled Events, and on Admissions > Dashboard.

To get started, go to Communications > Communication Plans.

1. Click **Add a communication plan** and start adding events.
2. After setting up your first plan, apply it to a test person to get a feel for how it works.

Read more about setting up and using [Communication Plans](#).

Next: [review additional admissions settings...](#)

4.8 Step Eight: Review Additional Admissions Settings

The settings in Admissions > Settings > Other Settings are not essential to your use of Admissions, but they can help it to better fit your school's needs.

Online application custom CSS

CSS entered here will modify the appearance of your online application.

Save Settings

Online application custom CSS

CSS (Cascading Style Sheets) is a programming language that lets you change the look and feel of a website. This field controls the look and feel of your initial Populi application form page(s). If you wish, you can enter your own CSS here to better integrate an embedded Populi application in your school's website. We recommend that an experienced programmer compose the CSS in another editor and copy-paste it into this field. Improperly-composed CSS can render your application unusable, so take special care with this field!

Send application fee payment notification emails to:

Enter the email address(es) for anyone who should be notified when an applicant pays an application fee online. Separate multiple addresses with commas.

Automatically mark leads *enrolled*

When you accept an applicant and he enrolls in a course in the term shown in his [lead info](#), Populi will automatically set his lead status to *enrolled*. If you wish to change how this works, select either the *...any term* option or the *Do not...* option.

Automatically mark leads *inactive*

Likewise, when an applicant enrolls in his target term, Populi will automatically set his lead info to *inactive*. If you wish to change how this works, select either the *...any term* option or the *Do not...* option.

Hide organization name on application

Check Yes to not show your school's name on the application form.

5. Financial Aid

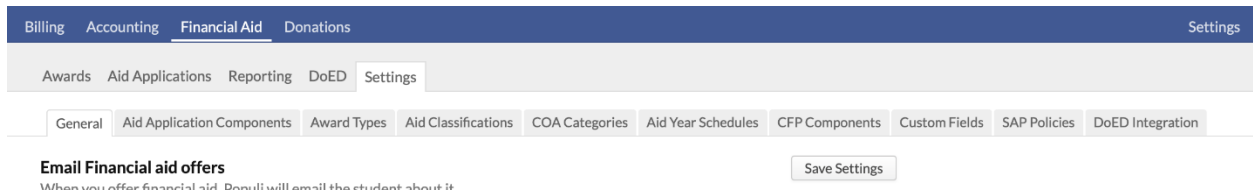
[Follow](#)

Set up aid awards, applications, classifications, schedules, and the optional DOE integration so your school can start processing financial aid.

- [Step one: start working on general financial aid settings](#)
- [Step two: set up financial aid application components](#)
- [Step three: set up financial aid award types](#)
- [Step four: Add COA Categories](#)
- [Step five: set up aid classifications](#)
- [Step six: set up aid year schedules](#)
- [Step seven: enter DoE settings \(optional\)](#)

5.1 Step One: Start Working On General Financial Aid

Settings



General financial aid settings cover a wide variety of miscellaneous aid functions and workflows.

Look over these settings first, if only to get a sense of some of your options; you can return here at any time (even after setup) to update them to suit your needs.

To get started, go to Financial Aid > Settings > General. Review and update the settings you need to change. A few notes:

- When you're finished, make sure to scroll back to the top of this screen and click **Save Settings**.
- **Items marked with * require a Financial Admin to fill them in.**

- Additional settings related to financial aid are located in [Financial > Settings](#). You will need to ask someone with the Financial Admin role to fill those in.

*** Email Financial Aid Award Offers**

When you offer a financial aid award to a student, you can have Populi send them a simple email with the details (There are other options for informing students of Awards, including printed award letters).

Financial Aid Phone Number

Your school's financial aid office phone number is included on the 1098-T forms you submit to the Internal Revenue Service.

*** Manually apply financial aid to invoices**

When you disburse financial aid, it automatically applies to the oldest unpaid invoices first. If you would rather have complete, manual control over how these payments hit student accounts, check **Yes**.

Auto-apply pending aid terms

An aid disbursement will always be applied first to invoices in its own academic term. If there is pending aid left over after all term invoices are covered, should it auto-apply to any term with an unpaid invoice, or should it never auto-apply outside its term?

Disbursement batch workflow

When disbursing aid, in what order does your school process funds? Do you first disburse to students and then draw down funds from the source, or do you first draw down funds and then disburse to students?

Aid refund policy

By default, Populi creates a separate transaction for each type of money that can be refunded. If you wish to change the types of transactions generated when you refund a credit balance, select your preference here.

Below are your options for this setting, together with brief explanations of what will happen in the following scenario:

Student Rainey Sparhawk has a credit balance of \$600. She has \$200 unused of a Pell Grant, \$200 unused of a local scholarship, and a \$200 overpayment.

- **Separate all refunds:** Three separate transactions are required: an Aid Refund for the Federal aid (Pell Grant), an Aid Refund for the scholarship, and a Customer Refund for the overpayment.
- **Separate Federal aid refunds from all other refunds:** Two separate transactions are required: an Aid Refund for the Federal aid and a Customer Refund for the combined scholarship and overpayment.
- **Separate all aid refunds from non-aid refunds:** Two separate refund transactions are required: an Aid Refund for the combined Federal aid and scholarship and a Customer Refund for the overpayment.
- **Combine aid and non-aid refunds:** One, single Customer Refund combining all three refunds is required.

Email students about disbursements/refunds

Select *Yes* to email students every time a disbursement or refund is posted to their accounts. If you select *No*, you may still email them about particular disbursements/refunds.

Disbursement/refund email text

Enter the text you'd like to include in the aforementioned emails.

Refunded aid recoup fee

Select a fee to charge students when you refund aid to the source after having refunded it to the student.

Enrollment status mismatch warnings

When a student's enrollment status on the aid application does not match their actual enrollment status, should Populi display a warning? Warnings are shown on the Aid Applications report and individual student aid applications.

Send enrollment status change notification emails to:

Notify these people when a student's enrollment status does not match the status listed on their aid application.

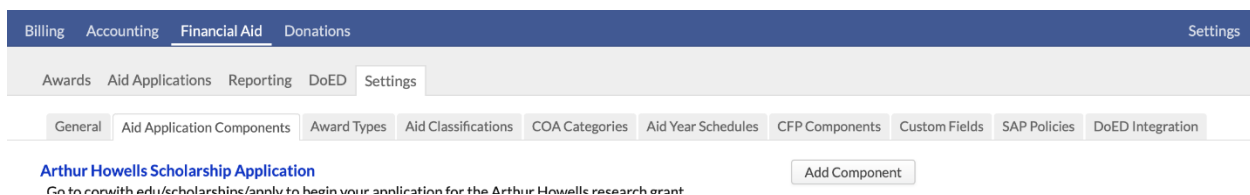
Academic Term Grouping

To combine two or more academic terms for financial aid purposes, select a Report As term from the drop-down. Academic enrollment data from the term in the Term column will be included in the data from the term in the Report As column.

For example, you may have three Summer terms—Summer A, B, and C. Because of their timeframes and how you manage enrollment for those terms, you could set Summer B and Summer C to *Report As* Summer A.

Next: start adding [aid application components](#).

5.2 Step Two: Set Up Financial Aid Application Components



The screenshot shows the 'Financial Aid' section of the Populi system. The top navigation bar includes 'Billing', 'Accounting', 'Financial Aid', and 'Donations'. Below this, a sub-navigation bar shows 'Awards', 'Aid Applications', 'Reporting', 'DoED', and 'Settings'. A secondary menu lists various configuration options: 'General', 'Aid Application Components', 'Award Types', 'Aid Classifications', 'COA Categories', 'Aid Year Schedules', 'CFP Components', 'Custom Fields', 'SAP Policies', and 'DoED Integration'. The main content area displays the 'Arthur Howells Scholarship Application' with a description: 'Go to [populi.edu/scholarships](#) to begin your application for the Arthur Howells research grant'. An 'Add Component' button is visible in the top right of the application details.

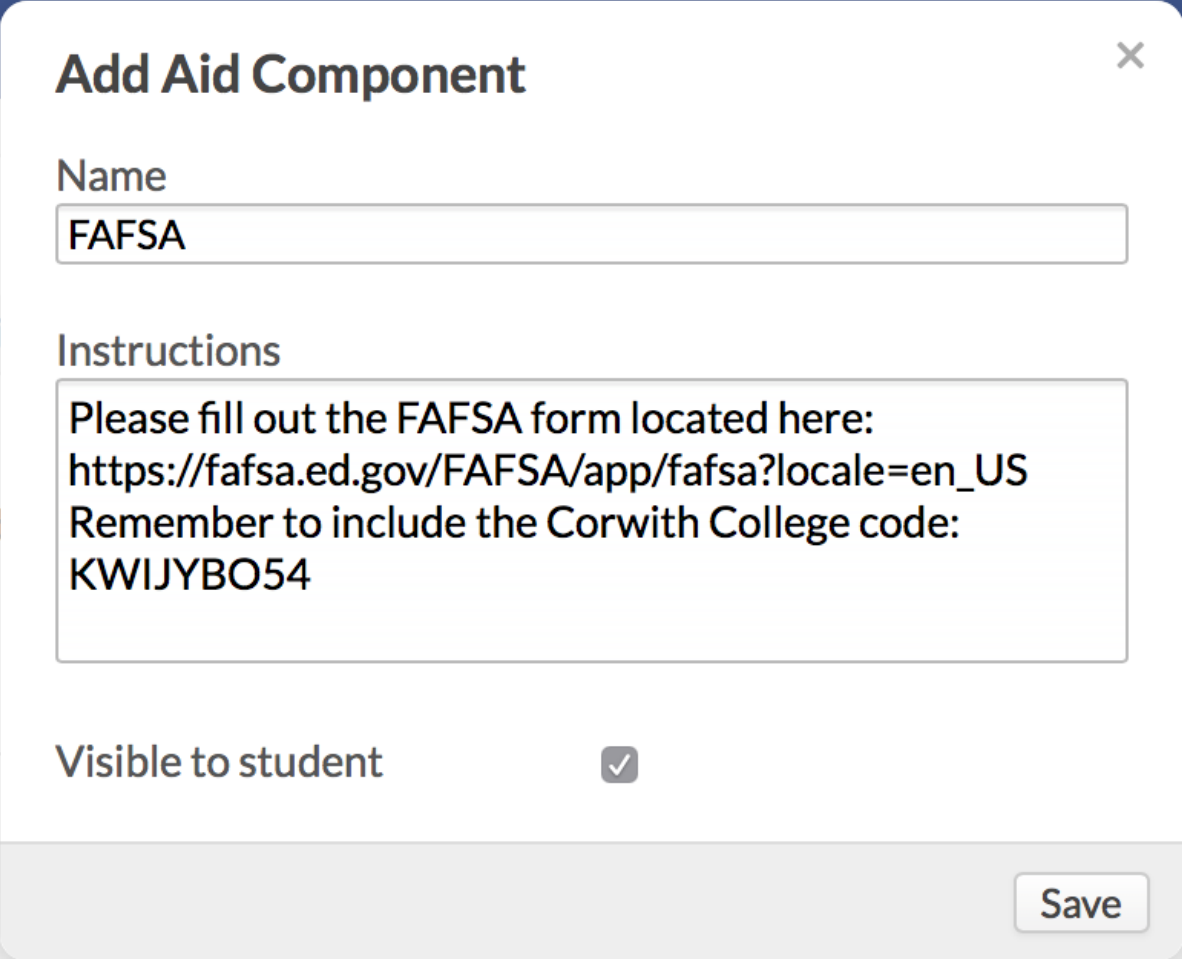
Financial aid application components help you collect the information you need from aid applicants in order to evaluate their financial need.

- Components consist of a name, description, and a *visible to student* setting.
- They supplement the built-in aid application on a student's Profile > Financial > Financial Aid view. [Aid classifications](#) let you pre-load certain aid applications with a particular combination of components.

- Typical aid application components would be things like the *FAFSA* or a *Statement of Financial Need*.

To get started, go to Financial Aid > Settings > Aid Application Components.

How to add new components



Add Aid Component ×

Name

FAFSA

Instructions

Please fill out the FAFSA form located here:
https://fafsa.ed.gov/FAFSA/app/fafsa?locale=en_US
Remember to include the Corwith College code:
KWIJYBO54

Visible to student

Save


1. Click **Add Component**.
2. Give the component a name.
3. Enter instructions for the component. If this component will be visible to the student, the instructions should direct the student how to complete the component.
4. Check whether the component will be *Visible to Student*.

5. Click **Save**.

The component is now made a part of all financial aid applications.

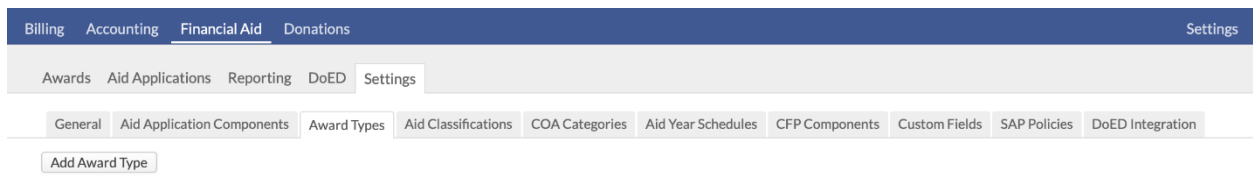
Changing components

Editing or deleting a component will only affect future aid applications; these changes will not be retroactively applied to current and past applications.

- Click a component's name to edit any of its details.
- Click  to delete a component.

Next: set up [financial aid award types](#).

5.3 Step Three: Set Up Financial Aid Award Types



Award types are the various financial aid awards you give to students, whether grants or loans, whether from a government entity or some other scholarship fund. As you prepare to award financial aid to students, you should review the built-in Federal awards and add any additional awards your school awards.

To get started, go to Financial Aid > Settings > Award Types.

Existing Federal award types

Populi includes the following Federal award types (they're marked with ):

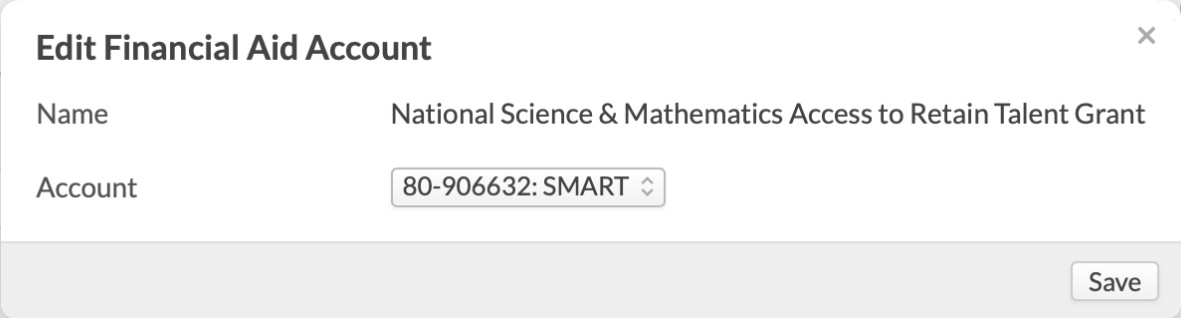
- **IASG:** Iraq and Afghanistan Service Grants (COD)
- **SMART:** National Science & Mathematics Access to Retain Talent Grant
- **PELL:** Pell Grants (COD)
- **PLUS:** Federal PLUS Loan (COD)

- **DLSUB & DLUNSUB:** Direct Loans, subsidized and unsubsidized (COD)
- **FSEOG:** Supplemental Educational Opportunity Grant
- **ACG:** Academic Competitiveness Grant
- **TEACH:** Teacher Education Assistance for College and Higher Education Grant
- **FWS:** Federal Work Study (COD)

You can choose to report any of your custom award types as one of these Federal awards (see below).

If you're using the DoED integration, the awards marked *(COD)* (and/or any custom award types you're reporting as a *(COD)* Federal award—see below) will be used when [syncing your data with the Common Origination and Disbursement system](#).

You cannot offer any of these awards until you associate it with a liability account.



Edit Financial Aid Account ×

Name	National Science & Mathematics Access to Retain Talent Grant
Account	80-906632: SMART ▾

Save

1. Click the award name.
2. Select the liability account for this award.
3. Click **Save**.

How to add new award types

Add Award Type ✕

Name

Abbreviation

Type

Scholarship

Source

Percent Based

Veterans Benefits

Need-based

Affects Need

Allow Partial Acceptance

IRS 1098-T

Only Allow Whole Dollar Amounts

Account

Each award type requires a corresponding liability account. Ask a Financial Admin user to review your school's [Chart of Accounts](#) and make sure the correct accounts have been set up.

1. Click **Add Award Type**.
2. Enter a name and abbreviation.
3. What type of award is it—a *Grant* or a *Loan*?
4. What is the award's source? Choose from *Federal*, *State*, *Institution*, or *Other*.

- If you select *Federal*, you must then select the Federal aid types as which you will report this award to the Department of Education. Your selection will also enable Populi to automatically calculate any origination fees connected to this Federal award.
 - If you're using the DoED integration, take special care with your selections; they will be used when syncing data with COD.
5. Is this award percentage-based? If so, [refer to this article](#) to learn about these kinds of awards.
 6. Check if you wish to flag this award as *Veterans Benefits*.
 7. Check if *Need-based* and whether this award affects the student's financial need amount.
 8. How should this award be reported on IRS 1098-T's? You'll get various options depending on whether the award is a loan or grant:
 - Scholarship (Box 1 and Box 5)
 - Payment (Box 1 only)
 - Scholarship for non-eligible fees (Box 5 only)
 - Tuition Discount (not reported)
 9. Do you want to only allow whole dollar amounts? That is, *\$1089* instead of *\$1088.78*, etc.
 10. Finally, select a liability account which will be affected by transactions involving this award.
 11. Click **Save**.

To edit an award, click its name and make your changes. Your changes will only affect future awards; if you've already added this award to a student, your changes will not be retroactive.

Next: set up [COA Categories](#).

5.4 Step Four: Add COA Categories

The screenshot shows a navigation menu with 'Billing', 'Accounting', 'Financial Aid', and 'Donations'. Under 'Financial Aid', there are sub-menus for 'Awards', 'Aid Applications', 'Reporting', 'DoED', and 'Settings'. The 'Settings' menu is expanded to show 'General', 'Aid Application Components', 'Award Types', 'Aid Classifications', 'COA Categories', 'Aid Year Schedules', 'CFP Components', 'Custom Fields', 'SAP Policies', and 'DoED Integration'. The 'COA Categories' sub-menu is active, displaying a table with two rows: 'Student Housing' (Type: Housing and meals) and 'Non-academic Fees' (Type: Tuition and fees). Each row has a 'Delete' icon. An 'Add a COA category' button is visible to the right of the table.

Category	Type	Delete
Student Housing	Housing and meals	
Non-academic Fees	Tuition and fees	

COA (Cost Of Attendance) Categories let you organize the charges under consideration in an aid classification (which you'll set up in the next step after this one). These categories will be used to generate amounts for the College Financing Plan that you make available to students.

1. Click **Add a COA Category**.
2. Give the category a name. This is the purpose the category will serve at your school. For example, a fine arts college might call something "Studio Time" and an engineering school might call something "Laboratory", but both might be considered "Other Education Costs" (see below).
3. Select the category's type. Types are derived from the DoED's templates for the College Financing Plan. The amounts generated will be aggregated on the CFP by type. So, if an aid classification includes two COA Categories with the "Tuition and Fees" type, the amounts for those two categories will be added together on the CFP under the *Tuition and Fees* heading.
4. When you're done, click **Save**.

You can delete a COA category as long as it is not used in an aid classification—just click .

Next: set up aid classifications.

5.5 Step Five: Set Up Aid Classifications

The screenshot shows the same navigation menu as above. The 'Aid Classifications' sub-menu is active, displaying a table with one row: 'General' (Program COA: 8,600.00, Year COA: 8,600.00, Enrollment: Full Time, Months: 10). Each row has a 'Retire' icon. An 'Add Classification' button is visible to the right of the table.

Name	Program COA	Year COA	Enrollment	Months	Retire
General	8,600.00	8,600.00	Full Time	10	

Aid Classifications let you create templates for your different financial aid applications. When you plug a classification into a student's aid application, it automatically supplies cost of attendance, enrollment information, and application components.

When packaging aid, classifications can be used in concert with [Aid Year Schedules](#) to originate aid packages with COD. The two items supply key information for the financial package: Cost of Attendance, enrollment status, and a disbursement schedule (among other items). You can include aid classifications in aid year schedules (covered in the next step).

To get started, go to Financial Aid > Settings > Aid Classifications.

How to add an aid classification

Add Classification



Name

Undergraduate FT

Program COA

17000

12000

on-campus

off-campus

Program COA Categories

select a category

Tuition

10000

on-campus

Fees

500

on-campus

On-campus housing

5000

0

on-campus

off-campus

Required Texts

1500

on-campus

Year COA

17000

12000

on-campus

off-campus

Enrollment

Full Time

Months

9

Components

- Corwith Scholarship Application
- FAFSA

Save

1. Click **Add Classification**.
2. Give the classification a name—for example, *Masters Part-Time* or *Undergraduate Online*.
3. Enter details for the Program COA (cost of attendance):
 - Enter on-campus and off-campus amounts (or just enter one or the other).
 - Select Program COA Categories (created in the [previous step](#)) from the drop-down.
 - For each COA category, you can specify on-campus and off-campus amounts by clicking and selecting *Toggle....*

- Enter the Year COA.
- Select the enrollment type: choose from *Full Time*, *Three-quarter Time*, *Half Time*, or *Less than Half Time*.
- Enter the number of months the student's program will occur in a given aid year.
- Check the application components you want to include in this classification.
- Click **Save**.

To edit a classification, click its name and make your changes. Keep in mind that your changes will not be retroactive.

Retire a classification by clicking .

Next: set up [aid year schedules](#).

5.6 Step Six: Set Up Aid Year Schedules

The screenshot shows a web application interface for Financial Aid. At the top, there is a navigation bar with 'Billing', 'Accounting', 'Financial Aid', and 'Donations'. Below this, there is a sub-navigation bar with 'Awards', 'Aid Applications', 'Reporting', 'DoED', and 'Settings'. Under 'Settings', there are several tabs: 'General', 'Aid Application Components', 'Award Types', 'Aid Classifications', 'COA Categories', 'Aid Year Schedules', 'CFP Components', 'Custom Fields', 'SAP Policies', and 'DoED Integration'. The 'Aid Year Schedules' tab is active. Below the tabs, there is a section for 'Asst. Dormitory Leader' with a 'Year' field set to '2019-2020' and an 'Add Schedule' button. Below that, there is a 'Disbursements' field with 'Spring 2020 2019-2020' and a note 'Disburse 100.00% on Jan 15, 2020'.

Aid Year Schedules let you schedule disbursements for all aid offers in upcoming academic terms.

This lets you avoid having to schedule disbursements for each student's individual offers.

Here's a simple example of how aid year schedules work:

1. You create a 2020-2021 schedule for Pell Grants that disburses 50% of the offer on September 1, 2020 and 50% on January 20, 2021 (these two dates are within three days of the start of your Fall and Spring Terms, respectively).
2. You assign the schedule to a student; this student accepts a \$2,000 Pell Grant.
3. Populi automatically schedules two disbursements for that student: \$1,000 on September 1, 2020 and \$1,000 on January 20, 2021.
4. When you originate the offer with COD, this information is automatically included in the origination data.

For U.S. schools, the Federal Aid Year runs from July 1 to June 30. We have hard-coded this into how Populi handles financial aid. If a student applies for the 2020-2021 aid year, he's applying for aid that he'd get between July 1, 2020 to June 30, 2021. For Canadian schools, we can set up custom aid years if so desired.

How to add an aid year schedule

Add Schedule



Name

Undergrad Institutional

Year

2019-2020

Disbursements

Equal Disbursement Amounts

Terms intersecting aid year

2019-2020: Summer B

2019-2020: Fall

Disburse on

2019-2020: Spring

Classifications

6-month Certificate

Full-time Masters

Full-time Undergraduate

Part-time Masters

Part-time Undergraduate

Aid Types

Corinne Fox Scholarship

Federal Work Study

Iraq and Afghanistan Service Grants

Master's Teaching Grant

McNally Scholarship

National Science & Mathematics Access to Retain Talent Grant

Save

: Grant

1. Click **Add Schedule**.
 2. Give the schedule a name.
 3. Select an aid year from the drop-down.
 4. Check the terms you wish to include in this schedule. These terms are those whose start and/or end dates fall within the aid year. So, for 2020-2021, you can choose from terms that start or end between July 1, 2020 and June 30, 2021.
- Consult the Federal Student Aid Handbook and any applicable state/province aid regulations when setting up disbursements for government-sourced offers.
 - When you check a term, enter the percentage of the total offer amount you wish to disburse.
 - Enter the date on which you wish to disburse the aid to your students.
 - You can also simply check *Equal Disbursement Amounts* to evenly divide offers across the disbursement dates you enter.
 - Click / to add or remove a disbursement date.

- Check the classifications and offer types you wish to include in this schedule.
- Click **Save**.

When you add any of the offer types included in the Schedule to a student, the Schedule will automatically add a series of pending aid disbursements to the student's account. These can be viewed (and individually edited) on the student's [Profile > Financial Aid](#) view.

Next: If you are using the DoED integration features, fill in those settings. If not, get acquainted with [Financial Aid workflows, reports, and functions](#).

5.7 Step Seven: Enter DoE Settings (Optional)

COD routing ID
The eight-digit number assigned to your institution to access the US Department

Save

If you wish to use [Populi's DOE Integration](#) features, start by [contacting Populi customer support](#); ask us to turn on the DOE features for your school. After we turn that on, you'll then enter your DOE

credentials and other settings. After you click **Save Settings**, remember that Populi will begin importing data from your SAIG mailbox every half hour!

Before starting with the DOE features, please heed the requirements and warnings [described here!](#)

COD Routing ID

The eight-digit number your school uses to access the U.S. Department of Education's Common Origination and Disbursement system.

OPE ID

Eight-digit number given to your school by the U.S. Department of Education's Office of Postsecondary Education (OPE) that lets you participate in the Title IV program.

Pell ID

Eight-digit number given to your school by the U.S. Department of Education that lets you participate in the Pell Grant program.

Direct Loan School Code

Eight-digit number given to your school by the U.S. Department of Education that lets you participate in the Direct Loan program.

SAIG Mailbox

Enter your SAIG mailbox's TG number (e.g. TGA1111).

SAIG Password

The Group Properties password for your SAIG mailbox. SAIG requires you to reset this password every 90 days. Every time you reset it, you will need to come back here and enter the new password. You can use [this site](#) to reset your password. If you're a masochist, you can use the incredibly misanthropic password-reset function in EDConnect (please refer to "SAIG Password" in the EDConnect user guide for details and instructions).

Here's a quick guide to resetting your SAIG password—but please remember that the authoritative instructions are found in the [EdConnect User Guide PDF](#) (in Section 4.3 of the aforelinked PDF).

This process is much simpler if you proactively reset your SAIG password—SAIG sends you warnings about it nine days before it expires, so heed that warning!

- 1. Go to the [SAIG Portal](#). Log in with your TG Mailbox Number for the username and your current SAIG Password.*
- 2. Navigate to Group Properties > Networking.*
- 3. Update your password on that screen.*
- 4. Use EdConnect to transmit your new password to SAIG.*
- 5. After giving SAIG about thirty minutes to contemplate your new password, try logging back in to the SAIG Portal with your TG Mailbox number and the new password.*
- 6. Finally, provided the above process worked, make sure to enter the new SAIG password in Populi!*

Message Class Download Filter

Populi downloads all of the messages in your SAIG mailbox and stores them permanently (even if Populi cannot interpret the file). If you want Populi to download certain message classes (and exclude the rest), check the message classes you wish to download.

- Messages downloaded to Populi will not be available in EDConnect. Likewise, messages downloaded into EDConnect will not download into Populi.
- If ISIRs is checked, then those will automatically be imported into Populi; you can process these in Aid Applications > ISIRs.
- If you uncheck ISIRs, you can still export those from EDConnect and manually import them into Populi.

COD Sync Start Year

Select the aid year at which you wish to start syncing with COD. Awards attached to aid years prior to the one selected here will not be considered for COD sync. This allows you to exclude old awards you want to manage through a system other than Populi. Populi's COD sync automatically excludes all awards more than one aid year old.

Next: If you wish to use SAP policies, [start adding those](#). If not, get acquainted with [Financial Aid workflows, reports, and functions](#).

6. Populi Courses

[Follow](#)

Set up your courses—assignments, lessons, tests, discussions, and more—so you can best use Populi to augment what you're here to do: teach your students.

- [Introduction to Populi courses](#)
- [Step one: review the items on the course Settings view](#)
- [Step two: set up assignments](#)
- [Step three: create lessons and discussions](#)
- [Step four: set up your online tests](#)
- [Final steps: enter final grades and finalize your course](#)
- [Setting up Conferences](#)
- [How to find your courses in Populi](#)
- [Course Reporting](#)
- [How to clone course content from another course](#)
- [Running your course](#)
- [Using LTI links](#)
- [Common Cartridge and Populi courses](#)
- [How to sync course content](#)
- [The course Syllabus view](#)
- [The Course Settings view](#)
- [Course Files](#)
- [Adding office hours to your faculty profile](#)

6.1 Introduction To Populi Courses

Populi lets you conduct your courses any number of ways:

- Since Populi is web-based, it's naturally suited to conducting online courses. You can handle everything from disseminating course info (schedule, reading list, deadlines, etc.) to administering lessons, tests, and discussions completely online. Integrations

with Zoom and BigBlueButton even let you use those services to conduct live video meetings from within Populi.

- If you're teaching an on-campus course, any number of setups are possible. Some professors simply use Populi to enter final course grades. Others offload repetitive grading items (quizzes and the like) to the online testing features. Yet others focus class time on lectures and discussion and leave all the testing and assignment submission to Populi.
- Mixed courses—those with on-campus and online students—use Populi to make sure both groups of students have access to all the same materials and so enable them to keep pace with each other.

Whatever your setup, Populi courses keep a complete record of everything entered—who was on the roster, who scored well on your tests, what grades your students earned—and plugs the relevant data into your students' permanent academic records.

The lifecycle of a course

Here are the steps your school follows in running a course:

1. The registrar sets up the course

Add Course [X]

Course		Meeting Times	
Department	Literature & Writing	<input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat
Course	RHT110: Ciceronian Rhe	Name	Recitation
Section	1	Times are (GMT-08:00) Pacific Time (US & Canada)	

When the registrar sets up the course, she's adding an "instance" of a catalog course to an academic term and filling in certain administrative details. You can see these details on the Course > Info view; some are inherited from the catalog course while others are specific to that course instance. These include things like meeting times, hours/credits, how the course counts towards GPA and degree requirements, and so on.

2. You're added as faculty or teaching assistant

Add Faculty ×

Search

William V. Lautin
willvlautin@corwith.edu

Lita Mayhew

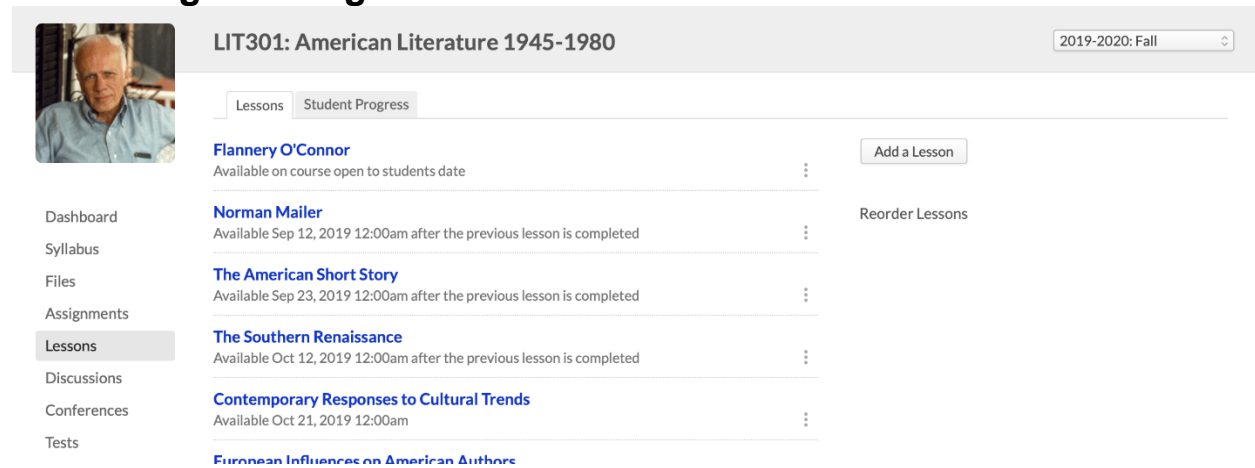
Primary

Save

After the registrar lists you as faculty or teaching assistant, you are given free reign over the course—save for the aforementioned administrative details. You can get to your courses a few ways:

- Via the Courses panel or Alerts found on your [Home page](#).
- Use the course list shown on your [Profile > Faculty](#) view or the *My Courses* view.
- Click the links provided in the email notifications Populi sends you to alert you to various course events.

3. You begin adding content



The screenshot shows a course management interface for "LIT301: American Literature 1945-1980" for the "2019-2020: Fall" term. On the left is a sidebar with navigation options: Dashboard, Syllabus, Files, Assignments, Lessons (highlighted), Discussions, Conferences, and Tests. The main content area has two tabs: "Lessons" and "Student Progress". Below the tabs, there is a list of lessons. Each lesson entry includes a title, a description of its availability, and a vertical ellipsis menu. The lessons listed are: "Flannery O'Connor" (Available on course open to students date), "Norman Mailer" (Available Sep 12, 2019 12:00am after the previous lesson is completed), "The American Short Story" (Available Sep 23, 2019 12:00am after the previous lesson is completed), "The Southern Renaissance" (Available Oct 12, 2019 12:00am after the previous lesson is completed), "Contemporary Responses to Cultural Trends" (Available Oct 21, 2019 12:00am), and "European Influences on American Authors". There are buttons for "Add a Lesson" and "Reorder Lessons".

Once you're listed as faculty (and providing you've been granted user access), you can jump right in and start adding content, assignments, files, and other details to your course(s). Sometimes you'll see content already present in the course. These items may have been cloned from a previous term or otherwise added by another user; you're free to modify any of these items.

You're free to do as you please, but we suggest adding content in the following order:

1. First, review the course's [Settings](#) and add materials in the [Syllabus](#) view.
2. Next, start adding [Assignments](#) (and Assignment Groups).
3. Then move on to [Lessons](#) and [Tests](#) (tests are created as Assignments, but are designed in the Tests view).

You can add or modify course content at any time during your run of the course (up to the point at which you finalize the course).

4. Students enroll

LIT301: American Literature 1945-1980 2018-2019: Fall

Status: Enrolled/Auditing (21) Check All | Check None

Students

Student	Status	P/F	Credits	Attendance
<input type="checkbox"/> Sho Byrne Undergraduate: Freshman	Enrolled		4.00	96.15% ⓘ
<input type="checkbox"/> Duk Kim Undergraduate: Freshman	Auditor			
<input type="checkbox"/> Vann Moore Undergraduate: Freshman	Enrolled	✓	4.00	81.82% ⓘ 87.74% P
<input checked="" type="checkbox"/> Daniel Parris Undergraduate: Freshman	Enrolled		4.00	90.38% ⓘ 93.1% A-
<input type="checkbox"/> Embay Parsons Undergraduate: Freshman	Enrolled		4.00	100% ⓘ 90.81% A-
<input type="checkbox"/> Mira Selkirk Undergraduate: Freshman	Enrolled		4.00	100% ⓘ 90.62% A-

When students start enrolling in the course, you'll see that activity reflected on the [Roster](#). Roster activity may continue throughout the term as students enroll late, withdraw, change to auditor, and so on. While there are settings that can change how these things work, for the most part, enrollment activity is managed by the Registrar.

5. The course begins

LIT301: American Literature 1945-1980 2018-2019: Fall

< Roster < Delia Silcotta >

Delia Silcotta
Undergraduate Freshman
BFA: Bachelor of Fine Arts - Pursuing as of 08/03/2017

Grade 92.89% A- **Attendance** 88.46%

Assignments

Info

Advisor	None
Status	Enrolled
Pass/Fail	No

Once the course commences, the students can submit assignments, interact with lessons and discussions, take online tests, and pipe in on chat and the bulletin board. Meanwhile, you'll [grade tests and assignments](#), [mark attendance](#), communicate with your students, and modify course content as needed. You can also monitor student progress and other course statistics on [student course summaries](#) and the [Performance Dashboard](#).

6. The course ends



ART451: The Rhetorics and Poetics of Film

2019-2020: Fall

Manage Finalization

Check all students | Uncheck all students

Finalize	Name	Status	Final Attendance	Final Grade	Letter Grade	Course Comment
<input checked="" type="checkbox"/>	Johnny Adams	Enrolled	88%	79.00%	C+	Strong papers, good contributions to class discussion.
<input type="checkbox"/>	Spilly Arndt	Enrolled	88%	85.00%	B	Insightful papers but had problems with timeliness.
<input checked="" type="checkbox"/>	Michelle Eckson	Incomplete	85%	84.00%	B	Good papers and discussion contributions, but was consistently late with readings. Incomplete.
<input checked="" type="checkbox"/>	Roger Frame	Enrolled	98%	89.00%	B+	Excellent papers offset by lack of attention to reading.
<input checked="" type="checkbox"/>	Joella Loclane	Enrolled	98%	88.00%	B+	Good, insightful work by the end of the term after a fairly weak start.
<input checked="" type="checkbox"/>	Embay Parsons	Enrolled	95%	87.00%	B+	Strong papers and good contributions to class discussion.
<input checked="" type="checkbox"/>	Loren Reven	Enrolled	95%	98.00%	A+	Remarkable work all around. A true pleasure to have in class.
<input checked="" type="checkbox"/>	Mira Selkirk	Enrolled	100%	96.00%	A	Superb papers, insightful analysis, and perceptive contributions to class discussion.
<input type="checkbox"/>	Zara Tamsen	Enrolled	100%	97.00%	A+	Absolutely excellent work.
<input checked="" type="checkbox"/>	James Yeager	Enrolled	89%	87.00%	B+	Strong papers, good contributions to class discussion.
<input checked="" type="checkbox"/>	Paula Zerott	Enrolled	96%	94.00%	A	Strong papers, excellent contributions to class discussion.

Finalize course and all students

By clicking "Submit" I acknowledge the above information for the selected students is complete and accurate.

- Dashboard
- Syllabus
- Files
- Assignments
- Lessons
- Discussions
- Conferences
- Tests
- Calendar
- Roster
- Gradebook
- Attendance
- Reporting
- Chat
- Settings

At the end of the Term, you'll [review student grades and attendance](#) and then [finalize the course](#).

Finalizing submits the grades and comments to the registrar, and commits the course's relevant academic records to each student's grade reports, transcripts, GPA's, degree audits, and so on.

After a course is finalized, it is closed to modification to both you and your students. The Registrar can temporarily unfinalize the course if necessary; you can also go back to the course roster and fill in grades for incomplete students.

Course navigation

Here's an overview of the different parts of a Populi course:

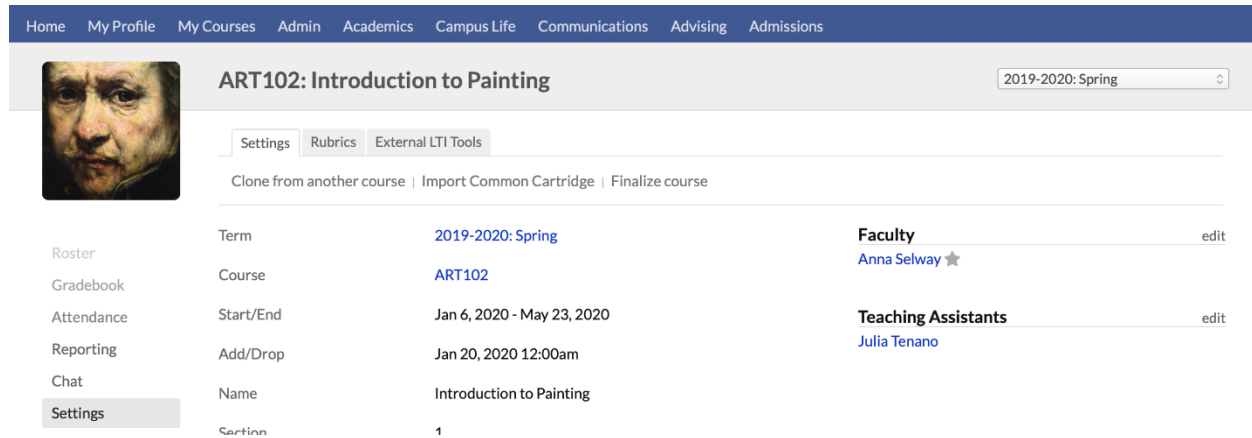
- Dashboard shows the course schedule, links to discussions, and includes a bulletin board that's open to you and all your students.

- [Syllabus](#) presents the information students need to understand how the course will be conducted and graded. It includes things like the description, reading list, and so on, as well as a place for you to compose a syllabus or upload/embed a syllabus file.
- In [Assignments](#), you create and manage assignments and assignment groups. This is also where you take the first step in creating online tests.
- [Lessons](#) lets you create online lessons, which in turn can be connected to particular assignments, tests, and discussions.
- [Discussions](#) lists all of your discussions, which can be course-wide or connected to particular lessons, as well as graded or not-graded.
- [Conferences](#) let you share live video, discussion, presentations, files, and more with your students in real-time. Populi integrates with two services (both of which require your school have an account set up with them): Zoom and BigBlueButton.
- In [Tests](#), you design, review, and grade your online tests. Tests are initially created in Assignments.
- The course [Calendar](#) shows every course event, including due dates, test and lesson availability, holidays, etc.
- The [Roster](#) gives you the basic details about your course's enrollment situation. Student names also link to their [student course summary](#) pages, which give you details about student performance and attendance.
- The [Gradebook](#) links to individual assignments, gives you grading tools, takes you to the final grade/attendance page, and lets you manage finalization.
- Wanna guess what you can do in [Attendance](#)?
- [Reporting](#) features the Performance Dashboard, which displays student performance statistics from various perspectives, and the Change Log, which records every course event, small or great.
- [Settings](#) contains information inherited from the course catalog (credits/hours, how grades affect GPA, among many others). It lets you manage rubrics and LTI tools as

well as clone/sync course materials, import a Common Cartridge file, and manage finalization.

Get started by reviewing your [Course > Settings...](#)

6.2 Step One: Review The Items On The Course Settings View



The screenshot shows the course settings interface for 'ART102: Introduction to Painting' in the '2019-2020: Spring' term. The top navigation bar includes links for Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, and Admissions. Below the navigation bar, there is a course header with a portrait of a man, the course title, and a dropdown menu for the term. The main content area is divided into three tabs: Settings (selected), Rubrics, and External LTI Tools. Below the tabs, there are links for 'Clone from another course', 'Import Common Cartridge', and 'Finalize course'. The main content area is a table with the following data:

Term	2019-2020: Spring	Faculty	edit
Course	ART102	Anna Selway ★	
Start/End	Jan 6, 2020 - May 23, 2020	Teaching Assistants	edit
Add/Drop	Jan 20, 2020 12:00am	Julia Tenano	
Name	Introduction to Painting		
Section	1		

The Course > Settings view has three sections:

- **Settings:** Displays general catalog information and settings for your course. Most of these items are inherited from the course catalog and so can only be changed by the registrar; the items you can change are covered below.
- **Rubrics:** Standard guides for evaluating and grading student assignments and other coursework. Read about how to set them up [in this article](#) and using them to grade student work [in this article](#).
- **LTI Tools:** One way to let your Populi course interact and share information with other learning management systems. [This article](#) goes into the details.

To get started, find your course and click Settings in the left sidebar. You can get to your courses a few different ways:



Anna Selway

Curator at Inland Northwest Historical Society

Activity Feed Bulletin Board Info **Faculty** Student Financial

Show |

[ART100: Art Studio 100](#)

Aug 12, 2018 - Dec 22, 2018 | 2.00 credits | 0.00 hours | 23 enrolled | 0 auditors

[ART102: Introduction to Painting](#)

Aug 12, 2018 - Dec 22, 2018 | 3.00 credits | 3.00 hours | 34 enrolled | 0 auditors

Add bio

🕒 2:57 PM local time

- Type the course name or abbreviation in Search and click the result shown under *Courses*.
- On your Populi Home page, look at the *My Courses* panel. *Current Courses* shows you courses currently in session; use the drop-down to find courses from different academic terms.
- On My Profile > Faculty, you'll find a more detailed version of My Courses. Again, use the drop-down to select *Current Courses* or courses from a specific term.

Once in Settings, you can make the following changes by clicking the field name:

- Write or edit the course description.
- Change the *Progress* and *Student Access* settings.
- Clone or sync course content (see below).

Cloning and syncing

Use these options to add content to your course that exists in other courses you've taught.

- [Cloning](#) copies content from past courses into your course. You can then edit any of the items you import using the clone feature.
- [Syncing](#) shares content among different sections of the same course in the same term.

If your course is already synced with another course section, then you cannot use the clone feature. You can, however, clone first and *then* sync course sections.

Read more about the [Course > Settings view](#).
Next, [set up your assignments...](#)

6.3 Step Two: Set Up Assignments

The screenshot shows a course management interface for 'ART102: Introduction to Painting' for the 2018-2019 Fall semester. The interface includes a navigation menu on the left with options like Dashboard, Info, Assignments, Rubrics, Lessons, and Discussions. The main content area displays 'Assignment Groups' and 'Assignments'.

Assignment Groups							
Name	Weight	Extra Credit	Drop Lowest	Mean	Median	Assignments	Delete
Reading	10%			0.0% (--)	0.0% (--)	1	
Sketchbook	35%			0.0% (--)	0.0% (--)	1	
Studio Work	55%			0.0% (--)	0.0% (--)	0	

Assignments								
Group	Type	Name	Points	Extra Credit	Due	Availability	% of Course	Delete
Reading	Grade-only	Schott Ch. 1-3	20		Aug 22, 2018 11:59pm	Aug 12, 2018 12:00am to Dec 22, 2018 11:59pm	2.22%	

Assignments are graded coursework. After creating assignments, your students can then interact with them in various ways (taking tests, uploading files, leaving comments, etc.), and you, in turn, can grade them—either directly or by using a rubric. Assignment grades are then cobbled together into the student's final course grade one of two ways:

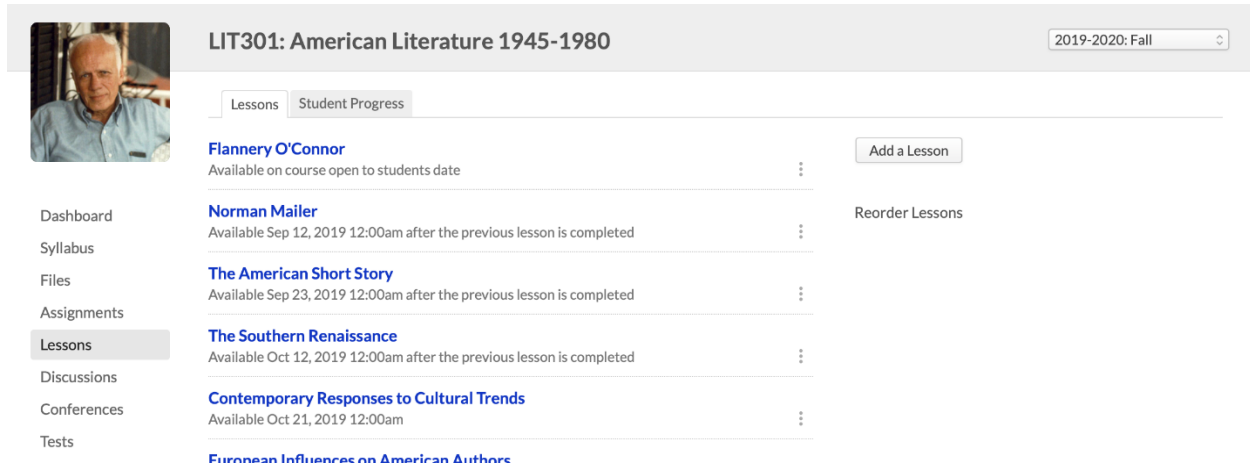
- If the course grade is based on [the weight you give to different kinds of assignments](#), you'll use assignment groups to set up the weighting. For example: Tests/Quizzes = 30%, Essays = 40%, Final Exam = 25%, Attendance = 5%.
- If you prefer to simply average assignment grades into the final grade, you'll eschew assignment groups and set up assignments.

To get started, go to your course and click the Assignments view. If you're using assignment groups, set those up first. Afterwards, start setting up assignments. As you add assignments, they'll automatically populate your gradebook. You can add and edit assignments and assignment groups up until the course is finalized.

Read more about [creating assignments](#); also have a look at [how to set up rubrics](#).
Next step: [set up your lessons...](#)

6.4 Step Three: Create Lessons And Discussions

Lessons and discussions are optional, so feel free to [skip this step!](#)



LIT301: American Literature 1945-1980 2019-2020: Fall

Lessons Student Progress

Flannery O'Connor
Available on course open to students date

Norman Mailer
Available Sep 12, 2019 12:00am after the previous lesson is completed

The American Short Story
Available Sep 23, 2019 12:00am after the previous lesson is completed

The Southern Renaissance
Available Oct 12, 2019 12:00am after the previous lesson is completed

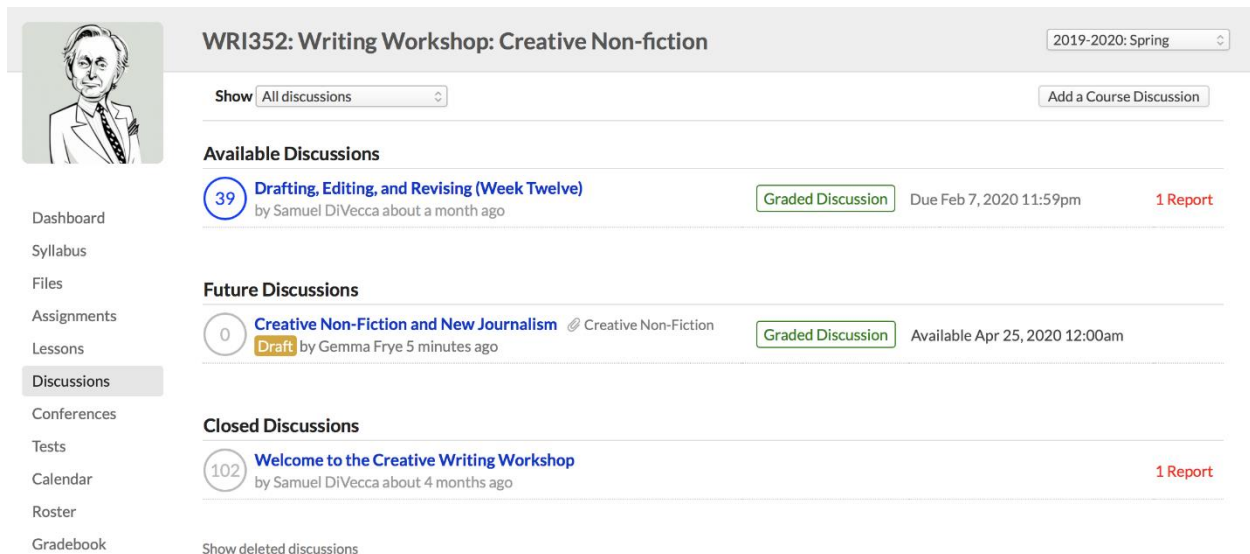
Contemporary Responses to Cultural Trends
Available Oct 21, 2019 12:00am

European Influences on American Authors

Add a Lesson

Reorder Lessons

Lessons are collections of course materials—assignments, discussions, links, files, and "lecture" notes—that cover a particular section of your course curriculum. They include an HTML-capable content editor that lets you include text, images, and streaming audio/video. You can make your lessons available for the entirety of your course, or you can limit their availability to particular date ranges.



WRI352: Writing Workshop: Creative Non-fiction 2019-2020: Spring

Show All discussions Add a Course Discussion

Available Discussions

39 Drafting, Editing, and Revising (Week Twelve)
by Samuel DiVecca about a month ago Graded Discussion Due Feb 7, 2020 11:59pm 1 Report

Future Discussions

0 Creative Non-Fiction and New Journalism Creative Non-Fiction
Draft by Gemma Frye 5 minutes ago Graded Discussion Available Apr 25, 2020 12:00am

Closed Discussions

102 Welcome to the Creative Writing Workshop
by Samuel DiVecca about 4 months ago 1 Report

Show deleted discussions

Discussions let you conduct online conversations with your students on course-related subjects.

- Discussions can be tied to the course or to specific lessons.

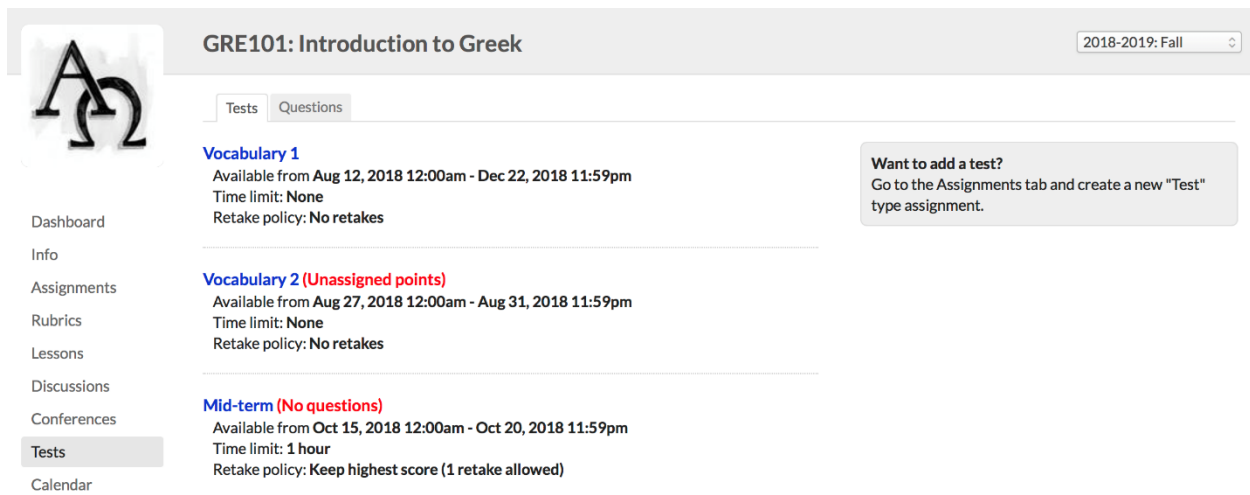
- You can create graded discussions by linking them to an assignment. Graded discussions have numerous options that let Populi auto-grade students based on their participation.
- Discussions can be started by faculty, teaching assistants, the registrar, and—if enabled on the [Course > Info view](#)—enrolled and auditing students.
- As mentioned above, discussions can be linked to lessons; in fact, you can even create new discussions within the lesson itself.

To get started, go to your course and click the Lessons view or the Discussions view. You can add and edit lessons and discussions up until the course is finalized.

Read more about [lessons](#) and [discussions](#).

Next step: [set up online tests...](#)

6.5 Step Four: Set Up Your Online Tests



GRE101: Introduction to Greek 2018-2019: Fall

Tests Questions

Vocabulary 1
Available from Aug 12, 2018 12:00am - Dec 22, 2018 11:59pm
Time limit: None
Retake policy: No retakes

Vocabulary 2 (Unassigned points)
Available from Aug 27, 2018 12:00am - Aug 31, 2018 11:59pm
Time limit: None
Retake policy: No retakes

Mid-term (No questions)
Available from Oct 15, 2018 12:00am - Oct 20, 2018 11:59pm
Time limit: 1 hour
Retake policy: Keep highest score (1 retake allowed)

Want to add a test?
Go to the Assignments tab and create a new "Test" type assignment.

Online tests let you design, administrate, and grade tests and quizzes.

1. First, you'll set up your test, specifying administrative details including availability, time limit, and proctoring.
2. Next you'll design your test with headings, text blocks, and, of course, questions.
3. After your students take the test, you'll handle grading, some of which can be done automatically, some must be done by you.

4. Finally, test grades are automatically entered in the gradebook.

To get started, go to your course and click the Tests view. You can add, edit, and grade tests up until the course is finalized.

Read more about [setting up tests](#).

Next step: [get familiar with the rest of your course...](#)

6.6 Running Your Course

Here's a quick look at what you'll do with your Populi courses. The point of a Populi course is to award the student a final grade, which is the only item from the course that makes it onto the student transcript. In some sense, everything in a Populi course is optional save for that. So, feel free to make as much or as little use of any of the features mentioned here!

Interaction with students

Once the course commences, your students will start submitting assignments, interacting with lessons and discussions, taking online tests, and piping in on chat and the bulletin board.

As their coursework rolls in, you'll...

- Grade [assignments](#) and [tests](#).
- Oversee your [discussions](#) and [chats](#).
- [Take attendance](#) and [update course events](#).
- Monitor [individual student performance](#) and overall [course grading stats](#).

Roster

LIT301: American Literature 1945-1980 2018-2019: Fall

Status: Enrolled/Auditing (21) Check All | Check None Actions

Students

Student	Status	P/F	Credits	Attendance	
<input type="checkbox"/> Sho Byrne Undergraduate: Freshman	Enrolled		4.00	96.15% ⓘ	
<input type="checkbox"/> Duk Kim Undergraduate: Freshman	Auditor				
<input type="checkbox"/> Vann Moore Undergraduate: Freshman	Enrolled	✓	4.00	81.82% ⓘ	87.74% P
<input checked="" type="checkbox"/> Daniel Parris Undergraduate: Freshman	Enrolled		4.00	90.38% ⓘ	93.1% A-
<input type="checkbox"/> Embay Parsons Undergraduate: Freshman	Enrolled		4.00	100% ⓘ	90.81% A-
<input type="checkbox"/> Mira Selkirk Undergraduate: Freshman	Enrolled		4.00	100% ⓘ	90.62% A-

[The course roster](#) lists all the students associated with the course section together with some basic enrollment information (credits/hours, attendance, etc.).

- **Students** shows those who are registered in the course (including enrolled, auditing, withdrawn, and incomplete students). You can change a student's status from *Enrolled* to *Incomplete* (and back again). Read more about [enrollment status](#).
- If the course has multiple course names, **Students** will be further grouped by course name.
- **Waiting List** shows those waiting to be enrolled in the course if the maximum enrollment number has already been met.

Roster activity may continue throughout the term as students enroll late, withdraw, change to auditor, and so on; whatever the case, whenever you look at the roster, you're seeing the current status of everyone taking your course.

Updating coursework


You can update your course at any time before it is finalized. As you add new assignments, for example, the gradebook will automatically figure out how to weigh it in final grade calculations.

Wanna spring a pop quiz on your students? Add a test in whenever you wish. Feeling merciful about

that term paper deadline? Set the due date back a week. As long as the course is in session, you have unlimited latitude to reshape the course content. Of course, if you're happy with how it's working, then just leave things as they are...

Find all the information you need about [conducting your courses](#) and [common tasks](#).
Next step: at the end of the term, [enter final grades and finalize the course...](#)

6.7 Final Steps: Enter Final Grades And Finalize Your Course



ART451: The Rhetorics and Poetics of Film 2019-2020: Fall

Manage Finalization

[Check all students](#) | [Uncheck all students](#)

Finalize	Name	Status	Final Attendance	Final Grade	Letter Grade	Course Comment
<input checked="" type="checkbox"/>	Johnny Adams	Enrolled	88%	79.00%	C+	Strong papers, good contributions to class discussion.
<input type="checkbox"/>	Spilly Arndt	Enrolled	88%	85.00%	B	Insightful papers but had problems with timeliness.
<input checked="" type="checkbox"/>	Michelle Eckson	Incomplete	85%	84.00%	B	Good papers and discussion contributions, but was consistently late with readings. Incomplete.
<input checked="" type="checkbox"/>	Roger Frame	Enrolled	98%	89.00%	B+	Excellent papers offset by lack of attention to reading.
<input checked="" type="checkbox"/>	Joella Loclane	Enrolled	98%	88.00%	B+	Good, insightful work by the end of the term after a fairly weak start.
<input checked="" type="checkbox"/>	Embay Parsons	Enrolled	95%	87.00%	B+	Strong papers and good contributions to class discussion.
<input checked="" type="checkbox"/>	Loren Reven	Enrolled	95%	98.00%	A+	Remarkable work all around. A true pleasure to have in class.
<input checked="" type="checkbox"/>	Mira Selkirk	Enrolled	100%	96.00%	A	Superb papers, insightful analysis, and perceptive contributions to class discussion.
<input type="checkbox"/>	Zara Tamsen	Enrolled	100%	97.00%	A+	Absolutely excellent work.
<input checked="" type="checkbox"/>	James Yeager	Enrolled	89%	87.00%	B+	Strong papers, good contributions to class discussion.
<input checked="" type="checkbox"/>	Paula Zerott	Enrolled	96%	94.00%	A	Strong papers, excellent contributions to class discussion.

Finalize course and all students

By clicking "Submit" I acknowledge the above information for the selected students is complete and accurate.

After your course is done (or particular students have completed it), it's time to finalize! Finalizing a student or a course submits the students' final grades as part of their permanent academic records.

- You can get to the *Manage Finalization* screen from the Info view, the Gradebook, or the Final Grade screen.
- After you finalize an incomplete student, you can come back at any time to [enter grades for him](#).

- You cannot unfinalize a course—if it must be done, you'll need to ask the registrar to do so for you.

Read more about [finalizing your course](#).

6.8 Finalizing Students And Courses

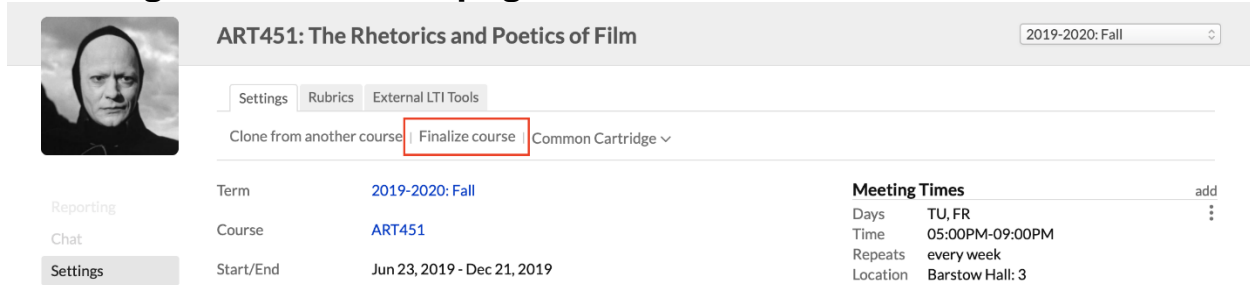
This article covers how to finalize your course or individual students.

- Both you and the registrar can finalize the course. In case you need to make changes after that happens, the registrar will need to first *unfinalize* the course.
- You finalize a course when it is finished—typically at the end of the term, though there are plenty of situations where you might need to finalize at a different time. When you finalize a course, this action also finalizes all the students in that course.
- You finalize individual students when it is time to make the course and a student's grade(s) part of his permanent academic record. Again, this usually happens at the end of the term. Some cases in which you'd finalize an individual student include a withdrawal after the course add/drop date or an *Incomplete*.
- You can finalize the course or a student at any point in the course's lifecycle.

When you finalize your course or individual students:

- You submit your students' grades as part of their permanent academic records.
- You lock the course to any further changes—both to course content and to student coursework.
- If you finalize a student (and not the course), you lock that student's coursework to any further changes.

How to get to the finalize page



The screenshot shows the course settings page for 'ART451: The Rhetorics and Poetics of Film' in the '2019-2020: Fall' term. The 'Finalize course' link is highlighted with a red box. The page includes a navigation menu on the left with 'Settings' selected, and a table of course details on the right.

Term	2019-2020: Fall	Meeting Times	add
Days	TU, FR		⋮
Time	05:00PM-09:00PM		
Repeats	every week		
Location	Barstow Hall: 3		

1. Go to any of the pages from which you can finalize the course. These pages are:
 - The [Course > Settings](#) view
 - [Gradebook](#)
 - The [Final Grade](#) page
2. Click **Finalize course**. (If any students have been finalized already, the link will say **Manage finalization**.)
3. You'll be taken to the Manage Finalization page.

The finalization page



ART451: The Rhetorics and Poetics of Film

2019-2020: Fall

Manage Finalization

Check all students | Uncheck all students

Finalize	Name	Status	Final Attendance	Final Grade	Letter Grade	Course Comment
<input checked="" type="checkbox"/>	Johnny Adams	Enrolled	88%	79.00%	C+	Strong papers, good contributions to class discussion.
<input type="checkbox"/>	Spilly Arndt	Enrolled	88%	85.00%	B	Insightful papers but had problems with timeliness.
<input checked="" type="checkbox"/>	Michelle Eckson	Incomplete	85%	84.00%	B	Good papers and discussion contributions, but was consistently late with readings. Incomplete.
<input checked="" type="checkbox"/>	Roger Frame	Enrolled	98%	89.00%	B+	Excellent papers offset by lack of attention to reading.
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<input checked="" type="checkbox"/>	Loren Reven	Enrolled	95%	98.00%	A+	Remarkable work all around. A true pleasure to have in class.
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<input checked="" type="checkbox"/>	Paula Zerott	Enrolled	96%	94.00%	A	Strong papers, excellent contributions to class discussion.

Finalize course and all students

By clicking "Submit" I acknowledge the above information for the selected students is complete and accurate.

- Dashboard
- Syllabus
- Files
- Assignments
- Lessons
- Discussions
- Conferences
- Tests
- Calendar
- Roster
- Gradebook
- Attendance
- Reporting
- Chat
- Settings

1. You can finalize the entire course, or individual students:
 - **Finalizing individual students:** The student's grades are submitted to his permanent academic record, updating his transcript, grade report, and statistics like earned credits and GPA. It also closes him out of the course, so he can no longer submit assignments, take tests, and so on.
 - When you finalize an *Incomplete* student, you can add [exceptions](#) for availability dates for the coursework, which permits him access to those assignments after he is finalized.
 - **Finalizing the course:** The course is closed down to all activity and updates. You can no longer add assignments, change settings, and so forth.

- **Finalizing all students, but not the course:** You can continue to update the course content, settings, and details.
2. Check the boxes next to individual students you wish to finalize, OR...
 - ...Check at the bottom to finalize both the course *and* any unfinalized students
 - **Check all students** lets you finalize all students without finalizing the course.
 - If you need to unfinalize a student, un-check his name.
 3. When finished, click **Submit**.

Now that you've finalized the course or students...

ART451: The Rhetorics and Poetics of Film 2019-2020: Fall

Settings Rubrics External LTI Tools

This course is finalized. Manage finalization | Common Cartridge

Reporting	Term	2019-2020: Fall	Meeting Times
Chat	Course	ART451	Days TU, FR
Settings	Start/End	Jun 23, 2019 - Dec 21, 2019	Time 05:00PM-09:00PM
			Repeats every week
			Location Barstow Hall: 3

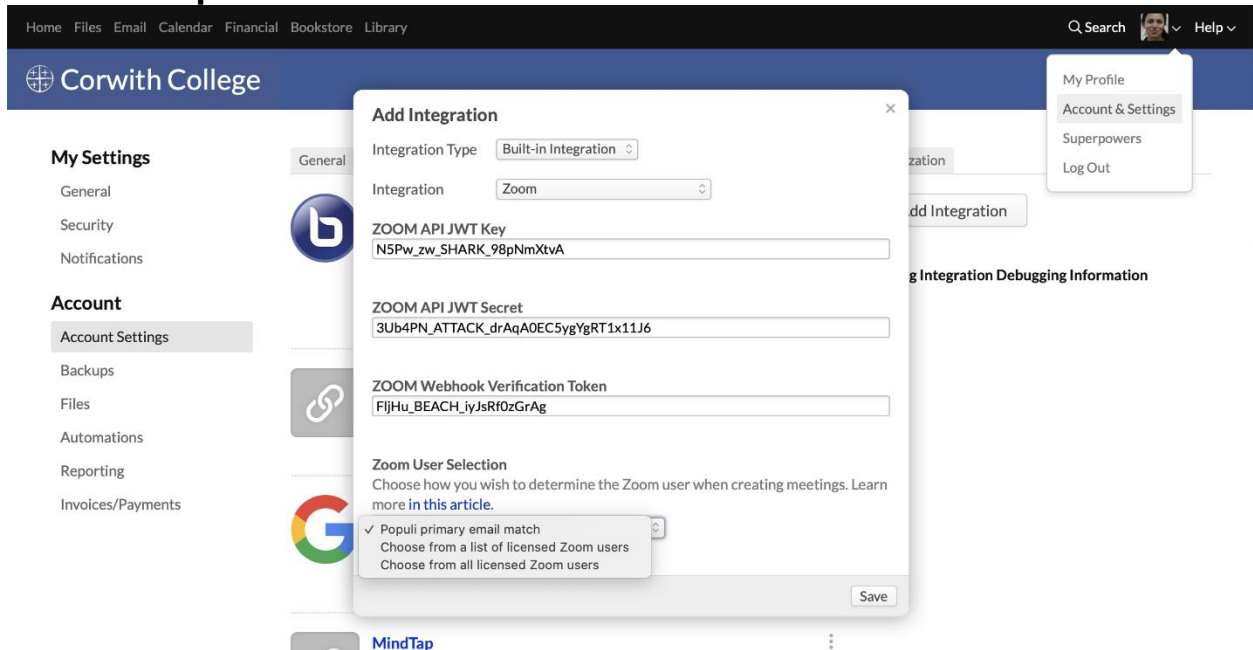
- Finalized student grades are now part of their grade reports, transcripts, and other academic records.
- appears in various places in the course pages (next to certain settings on Course > Settings, for example) or next to the student's name.
- If you've only finalized students, you can come back to this screen at any time to finalize other students or the entire course.
- If you've finalized an incomplete student, [read this article](#) to learn how to enter grades for her or mark her *complete*.
- If you finalize the course, you'll need to have the registrar unfinalize it should you need to make further changes.

6.9 Setting Up Conferences

This article describes how a Populi account administrator can set up Conferences for Populi courses. After the setup process is complete, faculty can then use [conferences](#) to share live video, discussion, presentations, files, and more with your students in real-time. Populi integrates with two services, both of which require you have an account set up with them:

- [Zoom](#) is a video-conferencing service that has gained a lot of traction in the world of online learning. Learn more at their [education page](#).
- [BigBlueButton](#) (BBB) is an open-source, web conferencing service designed for higher education. It requires that it be hosted in order to work with Populi. [Jump down](#) for a look at your setup options for BBB.
- You can use one service or the other or even both.

Zoom setup



Populi works with paid versions of Zoom's *Meetings* product that include access to the *Rest API* feature. The minimum plan you can use is the [Pro account](#). Make sure to include as many hosts as you require for your faculty to conduct meetings—if you have questions about how many hosts

you need, look through the FAQs on Zoom's pricing page or [contact their sales department](#). To set up this integration, you will first need to set up the appropriate account with Zoom.

1. Follow the instructions provided in Zoom's [Create a JWT App](#) article. Please refer to those instructions as you follow the next steps (especially when you're copying Verification Tokens and API credentials from Zoom).
- If you wish, you may enter `Populi` and `support@populi.co` in the *Developer contact* fields.
 - Go to the *Feature* section in Zoom.
 - Turn on *Event Subscriptions* with the toggle.
 - There's a small arrow next to *Event Subscriptions*. Click that ([here's a pic of what you're looking for](#)).
 - Click **Add new event subscription**.
 - Enter a **Subscription Name**—something like *Populi* or *Meeting Ended* would work.
 - Enter a **Event notification endpoint URL**. The URL would be your school's version of `https://yourschool.populiweb.com/router/conferences/zoom/webhook`
 - Click **Add events**
 - Check next to *End Meeting*, and then click **Done**.
 - Click **Save** at the bottom of the Event Subscriptions panel.
 - In Populi, go to Account > Account Settings > Integrations.
 - Click **Add Integration**. In the dialog, choose *Zoom* from the list of built-in integrations.
 - Copy the `JWT API KEY` and `JWT API SECRET` from the *App Credentials* section in Zoom and enter them in the Populi dialog.
 - Likewise, copy the Webhook Verification Token from the *Feature* section in Zoom and enter it in the Populi dialog. This token should be [about 20 characters long](#) (there's a JWT token from the *App Credentials* section that's 100 characters long—don't use that!).

- Choose how you want to manage **User Selection**. When your faculty schedule a conference, how do you want Populi to set aside your school's Zoom Users/hosts?
 - **Populi primary email match:** Populi will match the faculty user's primary email address with the corresponding email address in Zoom. Use this if you have set up specific Zoom users for individual faculty members.
 - **Choose from a list of licensed Zoom users:** Populi will let the faculty choose from the licensed Zoom users associated with the Zoom account whose credentials (JWT Key, etc.) you entered in this dialog. These Zoom users are identified by email address. Enter the email addresses in the field and separate multiple addresses with commas. Use this if you want your faculty to share selected Zoom user accounts with one another.
 - **Choose from all licensed Zoom users:** Populi will let the faculty choose from any of the licensed Zoom users associated with the Zoom account whose credentials (JWT Key, etc.) you entered in this dialog. Use this if you want your faculty to have access to any of your school's Zoom user accounts.

Setting up BigBlueButton

BigBlueButton requires that it be hosted in order to work with Populi; your school will need to have a working BBB account before you can set up this integration. All things considered, you have two options:

- Set up your own hosting situation. While this might be a lower out-of-pocket cost, it's also a lot of work.
- Engage someone to host it for you. You probably have a few options, but [Blindside Networks](#) runs BBB and provides hosting and support services for a lot of schools and other organizations.

To set up BigBlueButton in Populi, your school's Populi Account Administrator will need to do the following:

1. Go to Account > Account Settings > Integrations.
2. Scroll down the page and enter the BigBlueButton API Endpoint and Shared Secret settings. You can get these from your BigBlueButton host.
3. Scroll back to the top of the page and click **Save Settings**.

If you'd like to take BigBlueButton for a test drive, you can enter these credentials in the above-mentioned settings:

- **BigBlueButton API endpoint:** `https://populi-ft.api.rna1.blindsidenetworks.com/bigbluebutton/api/`
- **BigBlueButton API shared secret:** `410ddc7584b692761f6cb4d265cde284`

A few notes:

- Recordings made using the test account will expire after 7 days.
- Certain features (like breakout rooms) are disabled.
- The following welcome message will appear in the public chat for all BigBlueButton sessions: *For help using BigBlueButton watch these short tutorial videos. This BigBlueButton session is provided free of charge by Blindside Networks Inc. to Populi*

customers. **Recordings are automatically deleted after 7 days.** For permanent recordings and other premium features, please contact *Blindside Networks*.

Read about how faculty can [use conferences in their courses](#).

6.10 How To Find Your Courses In Populi

Here are the various ways you can find and navigate to your courses in Populi.

Home > Dashboard

The screenshot shows the Populi Dashboard interface. At the top, there is a dark navigation bar with links: Home, My Profile, My Courses, Contacts, Campus Life, Communications, and Advising. Below this is a lighter navigation bar with links: Dashboard, To-Dos, Groups, Links, and Manage News. The main content area is divided into three columns. The left column is titled 'Alerts' and contains a list of seven alerts, each with a bell icon and text indicating ungraded questions or new alerts in various courses. The middle column is titled 'Events' and shows a single event: 'Tomorrow 1p Chalmers Lecture'. Below the events is an 'Add a to-do' field. The right column is titled 'Courses' and features a 'Show' dropdown menu set to 'Current Courses'. Below the dropdown is a list of four courses with their names and instructor initials (Fac): ART451: The Rhetorics and Poetics of Film, LIT301: American Literature 1945-1980, WRI301: Creative Writing: Short Stories, and WRI352: Writing Workshop: Creative Non-fiction.

When you log in to Populi, you can find a couple different ways to get to your courses on the Home > Dashboard view.

- A list of your current courses is shown in the right column. Click to course name to go to the Course > Dashboard view.
- In the main column, *Alerts* brings new activity in your courses to your attention. Click the Alert to go to that course.


My Courses


Home My Profile My Courses Contacts Campus Life Communications Advising

Faculty Student

Dashboard All Courses

Current Courses [Email my current students](#)


 **ART451: The Rhetorics and Poetics of Film**
In Progress - Aug 9, 2020 - Dec 19, 2020 - Primary faculty Hank Spoon

 **ENG101: Mastering English for College Writing**
In Progress - Aug 9, 2020 - Dec 19, 2020 - Primary faculty Hank Spoon

The *My Courses* view shows you all the courses currently in session (Dashboard) and every course you've ever taught (All Courses). If you also have a student record at your school, you have similar views for those courses as well.

My Profile > Faculty

Home My Profile My Courses Contacts Campus Life Communications Advising

 **Hank Spoon**
Aleph College
#201500008

Activity Feed Bulletin Board Info Faculty Student Campus Life Financial

Show Current Courses Export

ART451: The Rhetorics and Poetics of Film Section 1
Aug 9, 2020 - Dec 19, 2020 | 2.00 credits | 2.00 hours | 0 enrolled | 0 auditors

LIT301: American Literature 1945-1980 Section 1
Aug 9, 2020 - Dec 19, 2020 | 4.00 credits | 0.00 hours | 0 enrolled | 0 auditors

WRI301: Creative Writing: Short Stories Section 1

Office Hours add

General
... Tue 7:00am-9:00am - Covey Coffee
... Wed, Fri 8:00am-10:00am - Freeman Hall 12

Statistics
Total Credits 13

12:39 PM local time
English
[Send Email](#)

Via the *Faculty* view on My Profile, you can find your courses, office hours, and some basic course stats; you can also export a spreadsheet of your course stats or your course schedules.

Email Notifications

Various events in a course will trigger Populi to email you a notification. Click the link in the email to go to that item in your course (you may have to log in to Populi).

LIT302: Annie Dillard



Corwith College <notifications@populi.co>
to me ▾

12:28 PM (1 hour ago) ☆ ↶ ⋮

New report from Adrienne Tours

Comment by Mira Selkirk:

Dillard's first novel, *The Living* (1992), centers around the first European settlers of the Pacific Northwest coast. While writing the book, she never allowed herself to read works that postdated the year she was writing about, nor did she use anachronistic words.

Report Reason:

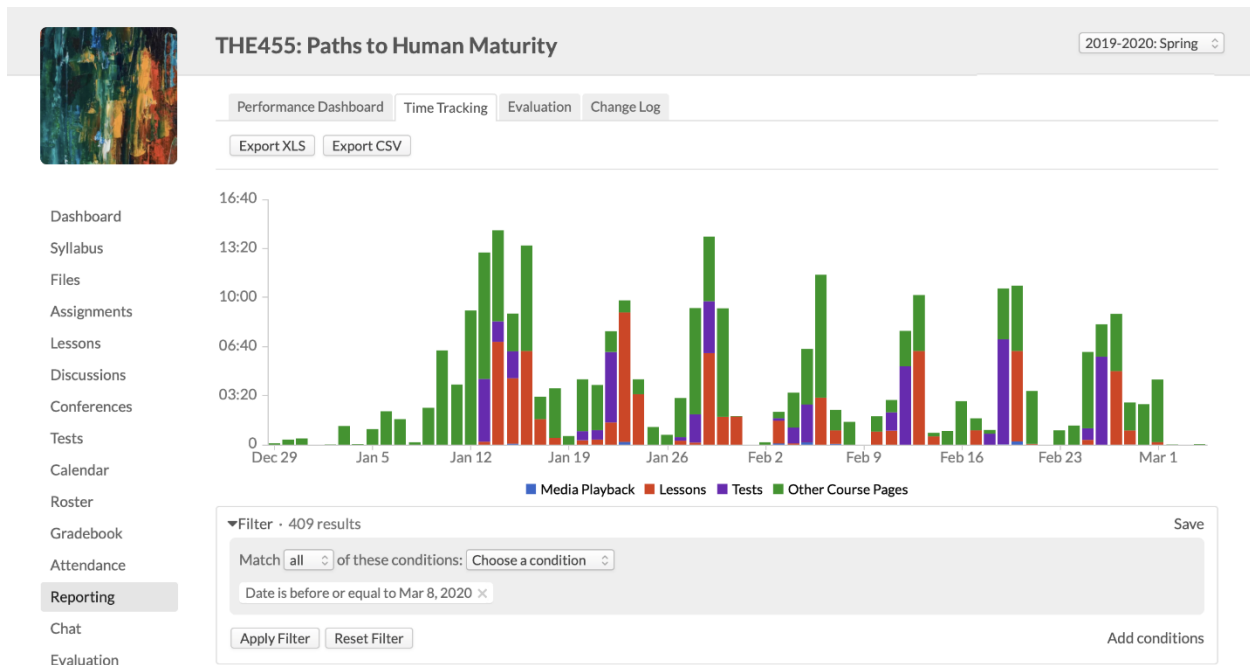
This was totally copied from Wikipedia!

[Click here to view the discussion](#)

You can opt-in to various course notifications in your personal Settings > Notifications view:

The screenshot shows the user interface for Corwith College. At the top, there is a navigation bar with links for Home, Files, Calendar, Financial, Bookstore, and Library. On the right side of the navigation bar, there is a search icon, a user profile icon, and a Help dropdown menu. Below the navigation bar, the Corwith College logo is displayed. The main content area is titled "My Settings" and includes a sidebar with options for General, Security, Notifications (which is currently selected), and Sent Messages. The "Notifications" section is further divided into "Text notification number" and "Email notification address". The "Text notification number" section shows that the user's text notification number is active, with the number (248) 796-0114, and a "Stop receiving text notifications" link. The "Email notification address" section prompts the user to enter an email address and provides a "Send Verification Link" button. A "Save Settings" button is located at the top right of the settings area. A dropdown menu is open over the user profile icon, showing options for "My Profile", "Settings", and "Log Out".

6.11 Course Reporting



The Course > Reporting view provides a variety of reports about your students' activity in your course. Here's a look at each of the reporting tools; you can also get perspectives on individual students using the [Student Course Summary](#).

Performance Dashboard


The performance dashboard gives you a look at student performance on assignments. You can use the drop-downs to look at specific students and/or assignments

Time Tracking

This report shows you how much time students spend on different portions of your course (and when they spent that time).

- The report organizes student activity around Discussions, Lessons, Media Playback, Tests, and *Other Course Pages* (which includes things like Syllabus, individual assignments, etc.).
- [Use the filter](#) to find specific students, dates, and types of course activity.

Evaluation



WRI301: Creative Writing: Short Stories

2020-2021: Summer B


[Performance Dashboard](#) [Time Tracking](#) [Evaluation](#) [Change Log](#)

Undergraduate

Faculty

Please fill out the entire evaluation. Your answers will be reviewed by the Academics & Faculty Committee of Corwith College as it considers how to improve the College's academic offerings. Thank you very much for your feedback!

1) Choose the three strongest aspects of the professor's organization of the course.

	Hank Spoon		
Lectures	14	60%	
Reading List	7	30%	
Discussions	7	30%	

- Tests
- Calendar
- Roster
- Gradebook
- Attendance
- Reporting**
- Chat

If your school is using course evaluations, you'll see the results of your course's evaluation as soon as the results are made available to you. To preserve student anonymity, you will not be able to see evaluation results until at least 60% of your students have submitted the evaluation. You can get more information about the evaluation and its availability on the [Course > Settings](#) view.


Change Log

The Change Log presents—in exhaustive detail—all the changes made to the course in the timeframe defined at the top of the screen. It includes everything from changes in specific course settings to student enrollment status to individual assignment grades, and so on.

Was this article helpful?

6.12 How To Clone Course Content From Another Course

[Home](#) [My Profile](#) [My Courses](#) [Admin](#) [Campus Life](#) [Communications](#) [Advising](#)



LIT301: American Literature 1945-1980

2019-2020: Spring

[Settings](#) [Rubrics](#) [External LTI Tools](#)

[Clone from another course](#) [Import Common Cartridge](#) [Finalize course](#)

Term	2019-2020: Spring	Faculty
Course	LIT301	Hank Spoon ★
Start/End	Jan 6, 2020 - May 23, 2020	
Add/Drop	Jan 20, 2020 12:00am	
Name	American Literature 1945-1980	
Section	1	


- Roster
- Gradebook
- Attendance
- Reporting
- Chat
- Settings**

Cloning copies content from past courses into your course. This saves you the slog of having to re-enter the same course content you added this time last year. If you want to just change a few things, you're free to edit any of the items you import using the clone feature.

- Faculty users can only clone content from courses with the same abbreviation. That is, ENG101 can clone from other instances of ENG101, but not from MATH101.
- Academic Admin users can clone content from any course into your course.
- You cannot clone content if the course section is [synced](#).

Clone From Course



- Clone
- Assignments
 - Assignment Groups
 - Faculty Added Discussions 
 - Files
 - Lessons
 - Links
 - Reading List
 - Rubrics
 - Supplies
 - Syllabus
 - Tests

Check: All, None

From

Clone from a different catalog course

I understand that cloning these items from

ART122 2019-2020: FALL

will **permanently erase** the corresponding items in

ART122 2020-2021: FALL

Save

To clone another course's content into your course...

1. Click **Clone from another course**.
2. Check the items you wish to clone.
3. Select the specific course instance from which you wish to clone them.
 - You can select different elements from different courses (e.g. clone the assignments from one and the links from another).
 - If you clone the *same* content from different courses, Populi overwrites the first with the second. For example, if you clone the tests from ENG101 Fall 2012 and then clone the tests from ENG101 Fall 2014, the 2014 tests will over-write those from 2012.
 - Faculty-added discussions will only clone if you also clone the lessons from the same course at the same time.
 - Only graded discussions will be cloned.
4. Check to confirm your choices and Save.

6.13 Running Your Course

Here's a quick look at what you'll do with your Populi courses. The point of a Populi course is to award the student a final grade, which is the only item from the course that makes it onto the student transcript. In some sense, everything in a Populi course is optional save for that. So, feel free to make as much or as little use of any of the features mentioned here!

Interaction with students

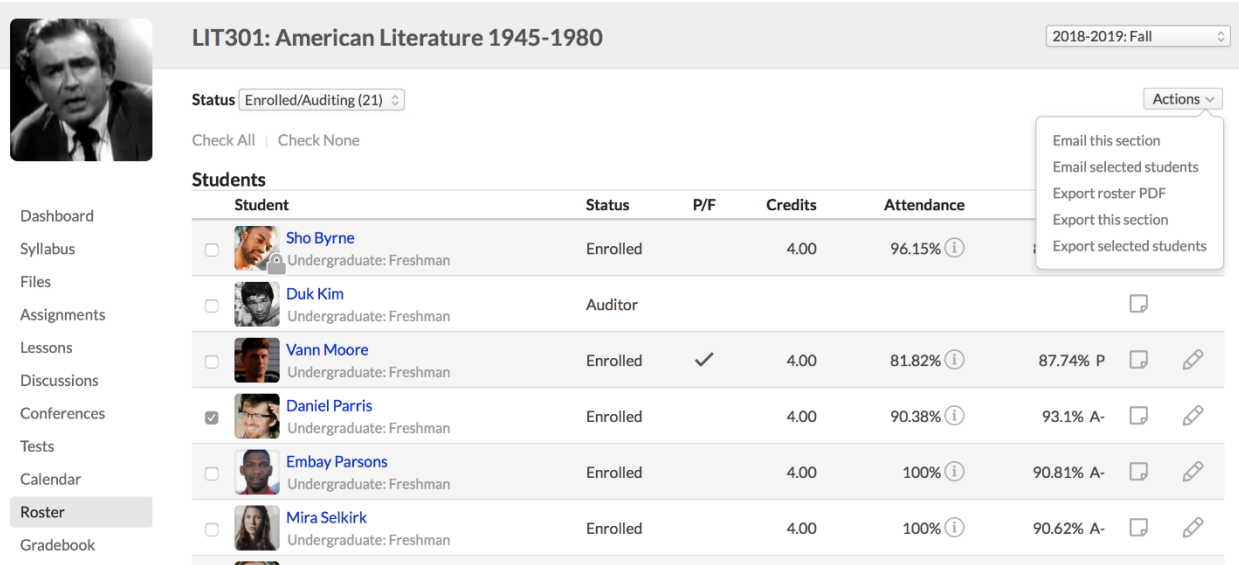
Once the course commences, your students will start submitting assignments, interacting with lessons and discussions, taking online tests, and piping in on chat and the bulletin board.

As their coursework rolls in, you'll...

- Grade [assignments](#) and [tests](#).
- Oversee your [discussions](#) and [chats](#).

- [Take attendance](#) and [update course events](#).
- Monitor [individual student performance](#) and overall [course grading stats](#).

Roster



LIT301: American Literature 1945-1980 2018-2019: Fall

Status: Enrolled/Auditing (21) Check All | Check None

Students

Student	Status	P/F	Credits	Attendance
<input type="checkbox"/> Sho Byrne Undergraduate: Freshman	Enrolled		4.00	96.15% ⓘ
<input type="checkbox"/> Duk Kim Undergraduate: Freshman	Auditor			
<input type="checkbox"/> Vann Moore Undergraduate: Freshman	Enrolled	✓	4.00	81.82% ⓘ 87.74% P
<input checked="" type="checkbox"/> Daniel Parris Undergraduate: Freshman	Enrolled		4.00	90.38% ⓘ 93.1% A-
<input type="checkbox"/> Embay Parsons Undergraduate: Freshman	Enrolled		4.00	100% ⓘ 90.81% A-
<input type="checkbox"/> Mira Selkirk Undergraduate: Freshman	Enrolled		4.00	100% ⓘ 90.62% A-

[The course roster](#) lists all the students associated with the course section together with some basic enrollment information (credits/hours, attendance, etc.).

- **Students** shows those who are registered in the course (including enrolled, auditing, withdrawn, and incomplete students). You can change a student's status from *Enrolled* to *Incomplete* (and back again). Read more about [enrollment status](#).
- If the course has multiple course names, **Students** will be further grouped by course name.
- **Waiting List** shows those waiting to be enrolled in the course if the maximum enrollment number has already been met.

Roster activity may continue throughout the term as students enroll late, withdraw, change to auditor, and so on; whatever the case, whenever you look at the roster, you're seeing the current status of everyone taking your course.

Updating coursework

You can update your course at any time before it is finalized. As you add new assignments, for example, the gradebook will automatically figure out how to weigh it in final grade calculations.

Wanna spring a pop quiz on your students? Add a test in whenever you wish. Feeling merciful about that term paper deadline? Set the due date back a week. As long as the course is in session, you have unlimited latitude to reshape the course content. Of course, if you're happy with how it's working, then just leave things as they are...

**Find all the information you need about [conducting your courses](#) and [common tasks](#).
Next step: at the end of the term, [enter final grades and finalize the course...](#)**

6.14 Using LTI Links

LTI stands for [Learning Tools Interoperability](#). It is a software standard that enables users in one system to jump to other systems without a separate login or app; it also lets the two systems share pertinent information with one another.

Use LTI when you're using another LMS or service to provide course content to your students (while using Populi to store the permanent academic record). For example, a nursing school enrolls 35 students in a biology course that connects to an LTI-enabled test bank maintained by a textbook publisher: using LTI, the students can log in to Populi and follow the LTI link in the biology course to access the tests. In turn, the publisher passes the grade information back to Populi and automatically fills in the course gradebook.

Technical stuff

Here's a more technical explanation of LTI. Feel free to skip this part!

- *Populi is an LTI consumer.*
- *It is designed to work with an LTI tool provider.*
- *Populi handles authentication to the provider and supplies: name, some contact info, user ID, and user roles.*

- The LTI provider uses this information to admit the Populi user with the correct permissions. For example, the course faculty clicks the LTI link and is given test management/grading permissions in the other system. A student clicks the link and is given permissions that let her take the test. The other system, in turn, can then pass the student's grade back to Populi's gradebook.
- The Populi user's permissions in the other system are determined by the other system's setup.

Setting up LTI tools

You can set up global LTI tools for use in your courses, add your own LTI tools manually, and link specific assignments so grades can be passed in to Populi from the other system.

Set up a global external LTI tool

The screenshot shows the Moodle user interface for Corwith College. The top navigation bar includes links for Home, Files, Calendar, Financial, Bookstore, and Library, along with a search bar and user profile options. The main content area is titled 'My Settings' and includes sections for General, Security, Notifications, Account, Backups, Files, Reporting, and Invoices/Payments. The 'Integrations' tab is selected, and the 'Add Integration' dialog box is open. The dialog box has the following fields and options:

- Integration Type:** Built-in Integration (unchecked), External LTI Tool (checked)
- Configure Via:** Config URL (checked), Pasted XML (unchecked), Manual Entry (unchecked)
- Name:** (empty text field)
- Consumer Key:** chkchkUNLOCK
- Shared Secret:** shhhhhhhhhhh
- Config URL:** www.5z8.info
- Launch tool in a new tab:** (unchecked checkbox)

The dialog box also includes a 'Save' button and a 'Launch URL: moodle.corwith.edu' label at the bottom.

To set up a global LTI tool, the user must be a Populi account administrator.

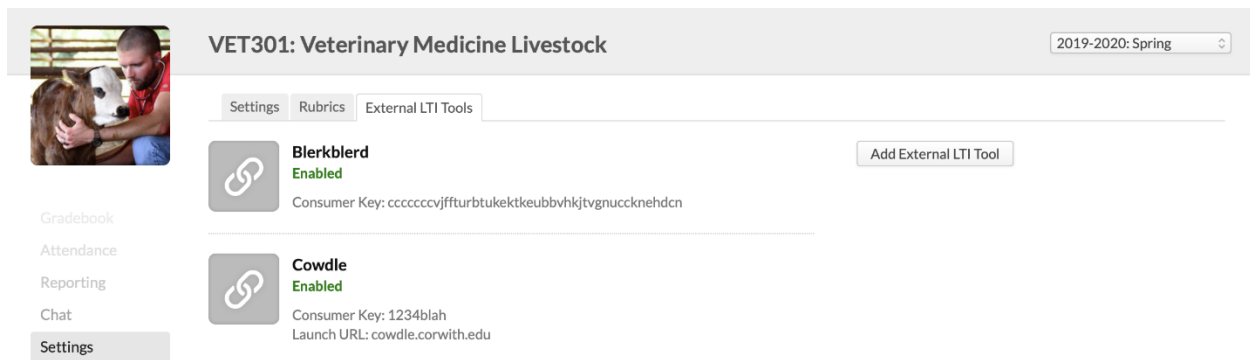
1. Go to Account > Account Settings > Integrations.
2. Click **Add an integration**.
3. For *Integration type*, select External LTI Tool.

4. Choose how you'd like to configure the LTI tool. You can use a Config URL, Pasted XML, or Manual Entry. Consult your LTI tool's instructions to see which option you should use and what to enter in each field.
5. When you're done, click **Save**.
6. Repeat these steps to add additional LTI tools.

Now that you've added this LTI tool, it's available for use when setting up an LTI link in any course at your school.

Using LTI tools in courses

You can view the available global LTI tools in Course > Settings > Global LTI Tools. Here's how to use these tools to add LTI links to your course.



The screenshot shows the 'External LTI Tools' section of a course page. The course is 'VET301: Veterinary Medicine Livestock' for the '2019-2020: Spring' semester. The 'External LTI Tools' tab is selected, showing two tools: 'Blerkblerd' and 'Cowdle'. Both are 'Enabled'. The 'Blerkblerd' tool has a consumer key of 'ccccccvjffrturbtukektkeubbhkjtvgnuccknehdcn'. The 'Cowdle' tool has a consumer key of '1234blah' and a launch URL of 'cowdle.corwith.edu'. A 'Settings' sidebar is visible on the left, and an 'Add External LTI Tool' button is in the top right.

Tool Name	Status	Consumer Key	Launch URL
Blerkblerd	Enabled	ccccccvjffrturbtukektkeubbhkjtvgnuccknehdcn	
Cowdle	Enabled	1234blah	cowdle.corwith.edu

Use a global LTI tool on Syllabus > Links

Add a Link ×

Title

URL

LTI Tool ⌵

[Add custom parameters](#)

[Hide advanced options](#)

- Dec 21, 2019

1. Go to the Course > Syllabus view.
2. Click **add a link**.
3. Enter the title.
4. Click **show advanced options**.
5. Select the LTI tool for the link. When you do this, it will supply the URL.
6. When you're done, click **Save**.

Using another LTI tool

Add a Link ×

Title

URL

LTI Tool

Custom Parameters

Name	Value
<input type="text" value="CP1"/>	<input type="text" value="dsljksdklsdfkldsklsdkl"/>
<input type="text" value="CP2"/>	<input type="text" value="dskjldskliennndncpipdj"/>
<input type="text"/>	<input type="text"/>

[Hide advanced options](#)

Advanced users can use the LTI dialog to configure a different LTI tool.

1. Go to the Course > Syllabus view.
2. Click **add a link**.
3. Enter the URL and title.
4. Click **show advanced options**.
5. Select the LTI tool for the link.
6. Click **add custom parameters**.
7. Enter the name and value for each parameter; you can enter as many parameters as you wish.
8. When you're done, click **Save**.

Using LTI to pass grades into Populi's gradebook

Title: Yokeman Ch. 1-5

URL: moodle.corwith.edu

LTI Tool: Moodle
Add custom parameters

Upload grades into: Yokeman Ch. 1-5
You must have LTI set up to use this feature.

Hide advanced options

Require students to click this link? Yes No

Save | Cancel

Add a section: Heading Content Assignment Discussion File Link Tin Can

For this method, you'll need to have associated an assignment with a lesson.

1. Go to the Course > Lessons view. Select the lesson you'd like to work with.
2. Make sure you've added the appropriate assignment(s) to this lesson!
3. Click **add a link**.
4. Enter the URL and title.
5. Click **show advanced options**.
6. Select an LTI tool; you can also enter custom parameters.
7. Select the assignment you wish to interact with this LTI tool.
8. When you're done, click **Save**.

Now that you've added this LTI link, when you enter grades in the other system, it will send those grades to Populi and automatically populate the course gradebook.

Common Cartridge And Populi Courses

*Populi courses can connect with other LMS software using a variety of integrations and import/export options. This article covers **Common Cartridge**; here are the other options:*

- [LTI Links](#) let users in one system jump to other systems without a separate login or app; it also lets the two systems share pertinent information with one another.
- Lessons let you incorporate [Tin Can elements](#).
- If your school uses the Canvas LMS, Populi has [an integration](#) with that system.

Populi's Common Cartridge (CC) features let you import content (lessons, files, tests, etc.) from another CC-compatible LMS for use in your Populi courses. You would use this method when you have course content stored in a [Common Cartridge-compliant system](#) (Moodle is a common example) that you wish to migrate into Populi. You can also export your Populi courses in the CC format.

The screenshot shows the course management interface for 'ART201: Beginning Studio' in the 2019-2020 Spring term. The interface includes a navigation menu on the left with options like 'Gradebook', 'Attendance', 'Reporting', 'Chat', and 'Settings'. The main content area has tabs for 'Settings', 'Rubrics', and 'External LTI Tools'. Below the tabs, there are links for 'Clone from another course', 'Finalize course', and 'Common Cartridge'. A dropdown menu is open over the 'Common Cartridge' link, showing 'Import' and 'Export' options. On the right side, there are sections for 'Faculty' (Gemma Frye) and 'Teaching Assistants' (Anna Selway), each with an 'edit' link.

Importing

When importing Common Cartridge files, remember that every LMS includes (and excludes) different data in their respective Common Cartridge exports. Populi can successfully import any valid Common Cartridge file, but it is of course limited by what is included on that file in the first place! If you have questions about what is included in your LMS' Common Cartridge export, please consult that system's documentation.

WRI352,WRI522_1585950074.imsc 8.4 MB · Complete

Import Records or [Cancel](#)

[Check all import types](#) | [Uncheck all import types](#)

Lessons

[Check all](#) | [Uncheck all](#)

Drawing Figures

Page: 1

File: 19-12-31 - Paths to Human Maturity - Syllabus.pdf

File: IMG_0679.jpg

Charcoal

1. Export the Common Cartridge file from your course (consult your LMS's documentation for how to do that).
 - Populi can import Common Cartridge files with the extension `.zip` or `.imsc`.
 - You can use Common Cartridge version 1.x (1.1, 1.2, etc...).
- Go to the Course > Settings view. At the top of the screen, click **Common Cartridge** and select *Import*.
 - Locate the file you exported from your LMS and upload it.
 - Review and select the materials you'd like to import.
 - When you have all the desired materials selected, go to the top of the screen and click **Import Records**.
 - Get back to your course by clicking **Go back to what you were doing**.

Exporting

Export ✕

The following items from this course will be exported. Grayed out items will be skipped.

Files

- 19-12-31 - Paths to Human Maturity - Syllabus.pdf
- IMG_0679.jpg
- nytimes_bergamo.jpg
- P1100126.jpg

Discussions

- Drafting, Editing, and Revising (Week Twelve)
- Welcome to the Creative Writing Workshop
- Hype and Gold Rushes
 - Page: 1
 - File (nytimes_bergamo.jpg)
 - File (P1100126.jpg)

Assignments

- *Drafting, Editing, and Revising (Week Twelve)* ⓘ
- *Attendance* ⓘ
- *Lewis Lecture* ⓘ
- *Week One* ⓘ
- *Week Two* ⓘ
- Breckridge 1-5
 - What does he say in *_these_chapters?*

21 total items to export.

Export

yes

When exporting CC files from your Populi courses, please keep these limitations in mind:

- CC does not support Populi's assignment types, and the assignments themselves won't be exported. However, graded discussions and tests—that is, CC-supported materials *connected* to assignments—can be exported.
- The exporter will not export any files larger than 100MB.
- The maximum size of the export is 500MB.

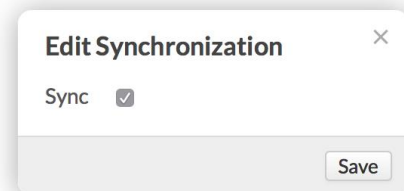
- The export skips all video files.
- If you have video or other large files in your course, download them separately.

Here's how to export CC files from your course:

- Go to the Course > Settings view. At the top of the screen, click **Common Cartridge** and select *Import*.
- Review the materials that will be exported. Items that are grayed out will not be included in the export (see above).
- Click **Export** at the bottom of the dialog.
- The file will download to your computer. Depending on how many files are included in the export, this could take a little time!

6.15 How To Sync Course Content

Published	Yes
Progress	Visible to students
<u>Sync</u>	No
Faculty	Samuel Dickison ★
Teaching Assistants	Add teaching assistants



Syncing shares content among different sections of the same course in the same term.

1. Go to the Course > Settings view.
2. Click **Sync**.
3. Check to confirm.
4. Click **Save** to finish.
5. Repeat these steps for each course section you wish to sync.

Stuff worth remembering about syncing...

- Any changes made to the content in one synced section affects *all* of the other synced sections!

- Populi syncs all course content—files, supplies, reading list, assignments, lessons, and tests (there's no picking-and-choosing as with cloning).
- Synced tests only sync the assignment and test name. You will need to import questions into the synced version of those tests.
- Synced discussions only sync the discussion title and topic.
- Syncing does not affect rosters, grades, attendance, faculty, or schedules.
- It only works with sections of the same course (i.e. MATH101 won't sync with MATH102).
- If you sync courses after grades have been entered, you will lose those grades. If you're gonna sync courses, do so at the *beginning* of the term, and not the end!

6.16 The Course Syllabus View

The screenshot displays the course syllabus view for ART451: The Rhetorics and Poetics of Film. The interface includes a navigation menu on the left with options like Dashboard, Syllabus, Files, Assignments, Lessons, Discussions, Conferences, Tests, Calendar, and Roster. The main content area is divided into several panels:

- Info:** Course Number: ART451; Term: 2019-2020: Fall; Dates: Jun 23, 2019 - Dec 21, 2019; Campus: Barstow; Units: Credits: 2.00, Hours: 2.00.
- Meeting Times:** Tuesday: 5:00pm-9:00pm, Barstow Hall: 3; Friday: 5:00pm-9:00pm, Barstow Hall: 3.
- Supplies:** Required Supplies: Pen & Notepad for film viewing.
- Faculty:** Hank Spoon - Primary; Send Email; (248) 336-3324; Office Hours: Monday, Wednesday - 8:30am-10:15am - Office 504, Barstow Hall.
- Links:** Brecktell Film Library, IMDB.
- Reading List:** Required Books.

The Syllabus view presents the information students need in order to understand how the course will be conducted and graded.


- Everything you see on the Syllabus is visible to the course's students.
- The **Info** panel includes basic information about the course that the registrar entered when the course was added to the term.
- The **Faculty** panel gives students ways to contact you; it also shows your [office hours](#) (if you've entered them).


- If you Save it, it will be in *Draft* mode (and will not be visible to students).
- When it's ready for prime-time, click **Save and Publish**.
- You can upload a file or import one from your [Populi files](#) or your [course files](#).
 - After uploading a syllabus file, click **edit** to replace, download, or delete it.

Supplies


Course supplies are items that students might need for the course (paint and brushes for studio art, or a graphing calculator for a physics course...).

Add supplies ×

Royal & Langnickel Oil Set 

Smock 

Checked = Required

1. Click **add supplies**.
2. Enter the supply name.
3. Click **Add** to list it.
4. Is the supply required? Check the box.
5. Click  to delete the supply from the list.

6. Click **Save** to finish.

Links

Links open a new browser window to the websites you specify in this panel.

1. Click **add a link**.
2. Type or copy-paste the URL text, e.g. `www.populi.co`.
3. Type the display title, e.g. *Populi Website*.
4. Click **Save** to finish.

Hover over the link to edit or delete it.

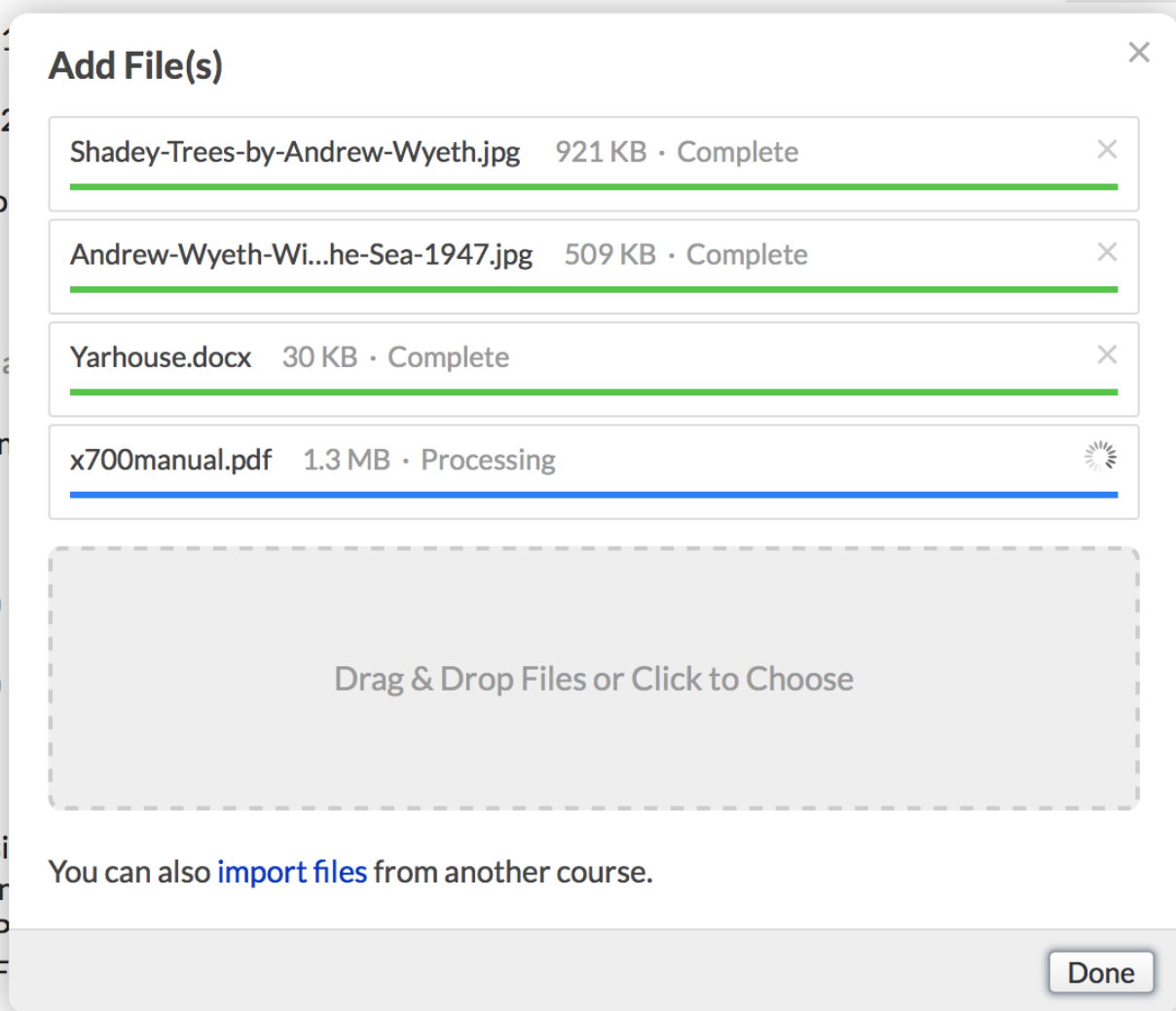
Reading List

The reading list contains all the course's required or recommended books.

1. Click **add a book**.
2. Enter the book's 10- or 13-digit ISBN or its title and click **Search**. Populi will look it up (on Amazon.com, unless that's disabled) and retrieve the title, author, cover, and other information.
3. You can also enter the book manually. This option requires you fill in a number of fields yourself.
4. Check if the book is required; otherwise it will list as *optional*.
5. Click **Save** to list the book.

Click a book's title to Delete it or change its status to *optional* or *required*.

Files



Add File(s) ×

Shadey-Trees-by-Andrew-Wyeth.jpg 921 KB · Complete ×

Andrew-Wyeth-Wi...he-Sea-1947.jpg 509 KB · Complete ×

Yarhouse.docx 30 KB · Complete ×

x700manual.pdf 1.3 MB · Processing ⌄

Drag & Drop Files or Click to Choose

You can also [import files](#) from another course.

Done

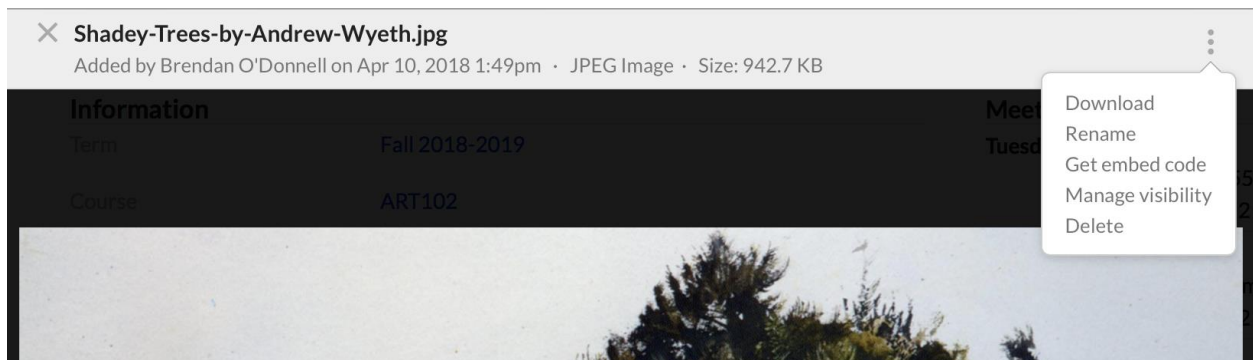
The files you store here might be anything of general use to the course.

- Files added here will also appear in your [course files](#).
- You can also add files in several other places in your course, including lessons, individual assignments, tests, discussions, and so on.
- Check out this tutorial about [how to use audio and video files](#).

You can also import files from other courses—pretty useful if your course "shares" large files with other courses.

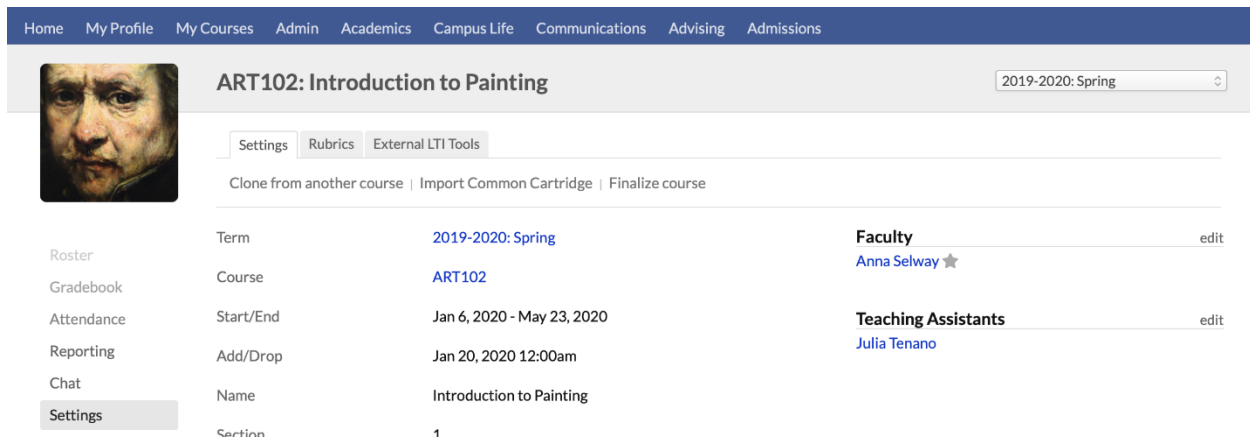
1. Click **import files** in the *add a file* dialog.
2. Select the course and term.
3. When you find the course and term you're after, check off all the files you wish to import.
4. Finally, click **Import Selected Files**.

Once a file has been uploaded:



- Click the file name to open the file viewer.
- Depending on the file type, you'll have a few different options. Longer text documents and PDFS, for example, let you jump to a particular page or heading.
- Click on any kind of file to open the actions menu. You can...
 - Download the file to your computer.
 - Rename the file.
 - Grab the embed code so you can embed it elsewhere in your course—a lesson, for example.
 - Manage the visibility of the file.
 - Delete the file.

6.17 The Course Settings View



The screenshot shows the Canvas LMS interface for the course 'ART102: Introduction to Painting' in the '2019-2020: Spring' term. The top navigation bar includes links for Home, My Profile, My Courses, Admin, Academics, Campus Life, Communications, Advising, and Admissions. Below the navigation bar, there is a course header with a portrait of a man, the course title, and a dropdown menu for the term. A secondary navigation bar contains 'Settings', 'Rubrics', and 'External LTI Tools'. Below this, there are links for 'Clone from another course', 'Import Common Cartridge', and 'Finalize course'. The main content area is divided into two columns. The left column contains a sidebar with links for Roster, Gradebook, Attendance, Reporting, Chat, and Settings (which is highlighted). The right column contains a table of course information and two sections for faculty and teaching assistants.

Term	2019-2020: Spring	Faculty	edit
Course	ART102	Anna Selway ★	
Start/End	Jan 6, 2020 - May 23, 2020	Teaching Assistants	edit
Add/Drop	Jan 20, 2020 12:00am	Julia Tenano	
Name	Introduction to Painting		
Section	1		

Course > Settings displays general catalog information and settings for your course. Here are the tasks you'll start or perform here:

- Working with various faculty-enabled [course settings](#).
- [Cloning](#) and/or [syncing](#) course content.
- Importing [Common Cartridge files and LTI Links](#).
- At the end of the term, [finalizing your course](#).
- Setting up [rubrics](#).

Finalize course



ART451: The Rhetorics and Poetics of Film

2019-2020: Fall

Manage Finalization

Check all students | Uncheck all students

- Dashboard
- Syllabus
- Files
- Assignments
- Lessons
- Discussions
- Conferences
- Tests
- Calendar
- Roster
- Gradebook
- Attendance
- Reporting
- Chat
- Settings

Finalize	Name	Status	Final Attendance	Final Grade	Letter Grade	Course Comment
<input checked="" type="checkbox"/>	Johnny Adams	Enrolled	88%	79.00%	C+	Strong papers, good contributions to class discussion.
<input type="checkbox"/>	Spilly Arndt	Enrolled	88%	85.00%	B	Insightful papers but had problems with timeliness.
<input checked="" type="checkbox"/>	Michelle Eckson	Incomplete	85%	84.00%	B	Good papers and discussion contributions, but was consistently late with readings. Incomplete.
<input checked="" type="checkbox"/>	Roger Frame	Enrolled	98%	89.00%	B+	Excellent papers offset by lack of attention to reading.
<input checked="" type="checkbox"/>	Joella Loclane	Enrolled	98%	88.00%	B+	Good, insightful work by the end of the term after a fairly weak start.
<input checked="" type="checkbox"/>	Embay Parsons	Enrolled	95%	87.00%	B+	Strong papers and good contributions to class discussion.
<input checked="" type="checkbox"/>	Loren Reven	Enrolled	95%	98.00%	A+	Remarkable work all around. A true pleasure to have in class.
<input checked="" type="checkbox"/>	Mira Selkirk	Enrolled	100%	96.00%	A	Superb papers, insightful analysis, and perceptive contributions to class discussion.
<input type="checkbox"/>	Zara Tamsen	Enrolled	100%	97.00%	A+	Absolutely excellent work.
<input checked="" type="checkbox"/>	James Yeager	Enrolled	89%	87.00%	B+	Strong papers, good contributions to class discussion.
<input checked="" type="checkbox"/>	Paula Zerott	Enrolled	96%	94.00%	A	Strong papers, excellent contributions to class discussion.

Finalize course and all students

By clicking "Submit" I acknowledge the above information for the selected students is complete and accurate.

Finalizing the course submits student grades to the registrar. Generally speaking, it's the last step you take when running your course—when you finalize, you include your students' course grades in their permanent academic records.

- You can finalize individual students or the entire course all at once.
- You can also finalize the course in the [Gradebook](#) or on the [Final Grade](#) page.

Read all about [finalizing your course](#).

Faculty-controlled settings

Most course info is entered by the registrar or comes from the course catalog. You can modify these items here: Description, Sync, Student Access, Progress, and Discussions.

Start/End dates and Student Access

Course

ART 102

Start/End

Aug 12, 2018 - Dec 22, 2018

Add/Drop

Aug 26, 2018 12:00am

Start/End dates confine student activity in the course to the time between those dates. Students cannot interact with course materials before the start date nor after the end date. If you wish to allow student access outside the start/end dates, ask an admin to change the *Student Access* date within the Start/End dates field.

Description

You can modify the description for individual sections of the course. This does not affect the master description in the course catalog. You can also modify the course name for particular students in the [course roster](#). The description will appear on the [Syllabus view](#).

Sync

Learn how to sync multiple sections of the same course [in this article](#).

Published

The *Published* setting determines whether or not your students can see course content. This can help prevent over-eager students from, for instance, buying the wrong books ahead of time after looking at a "work-in-progress" reading list. When a course is *Published*, they have full access to it. When it is not, they'll only be able to see the course name, description, pass/fail status, credits/hours, faculty, and meeting times.

1. Click *Published*.
2. Selected *Yes* or *No*.
3. Click **Save** to finish.

Progress

Progress determines whether your students can view their in-progress grades.

1. Click *Progress*.
2. Check or uncheck *Visible to Students*.
3. Click **Save** to finish.


When course progress is *not* visible to students, they will not be able to see their overall course grade until you finalize that student or course.

Discussions

This setting lets you determine whether students can create new discussions. If enabled, students can add new discussions in both the course and individual lessons. You'll retain complete control over their discussions. You can delete them, close them, or even upgrade them to a graded discussion.

1. Click *Discussions*.
2. Can students add discussions? Select *Yes* or *No*.
3. Click **Save** to finish.

6.18 Course Files



ART451: The Rhetorics and Poetics of Film

2019-2020: Fall

Files

[New Folder](#) [Add Files](#)

[A Summary of the Ingmar Bergman Year.pdf](#) [Download](#) [Copy](#) [Move](#) [Delete](#)

<input type="checkbox"/>	Name	Kind	Size	Date Added	Added By	Access
<input type="checkbox"/>	Film Clips	Folder	45.3 GB	Dec 11, 2019 12:06pm	Hank Spoon	Visible to staff/faculty only
<input type="checkbox"/>	Film Stills	Folder	56.5 MB	Dec 11, 2019 10:02am	Hank Spoon	Visible to students
<input type="checkbox"/>	5318669_orig.png <small>Lessons > Watching films: Mise en scene</small>	PNG Image	508.2 KB	Dec 11, 2019 9:46am	Hank Spoon	
<input checked="" type="checkbox"/>	A Summary of the Ingmar Bergman Year.pdf <small>Assignments > Reaction: Bergman</small>	PDF Document	7.7 MB	Dec 11, 2019 9:37am	Hank Spoon	
<input type="checkbox"/>	Kurosawa_McTell.pdf <small>Syllabus</small>	PDF Document	1.1 MB	Dec 9, 2019 2:34pm	Gemma Frye	
<input type="checkbox"/>	Kurosawa_McTell.pdf <small>Assignments > Auteur Theory</small>	PDF Document	1.1 MB	Dec 11, 2019 12:00pm	Darius Block	

- Dashboard
- Syllabus
- Files**
- Assignments
- Lessons
- Discussions
- Conferences
- Tests

The Files view gathers together all the files you've uploaded to Syllabus, individual assignments (not student submissions), and lessons.

- The main view is accessible as follows:
 - Course faculty, teaching assistants, registrars, and academic admins can view and add files.
 - Students can view files (if you want them to be able to add files, give them access to a folder—see below).
- Check next to a file to see options to download, copy, move, or delete it.
- Click the file to view it within the Populi file viewer. It lets you watch videos, listen to audio, and view images and documents.
- In the file viewer, click to download, rename, send, or trash the file.

Folders

Files > Film Stills

 New Folder  Add Files

This folder is visible to students · [Manage access](#)

Manage student access to Film Stills

Access Visible to staff/faculty only
 Visible to students
 Students can add files

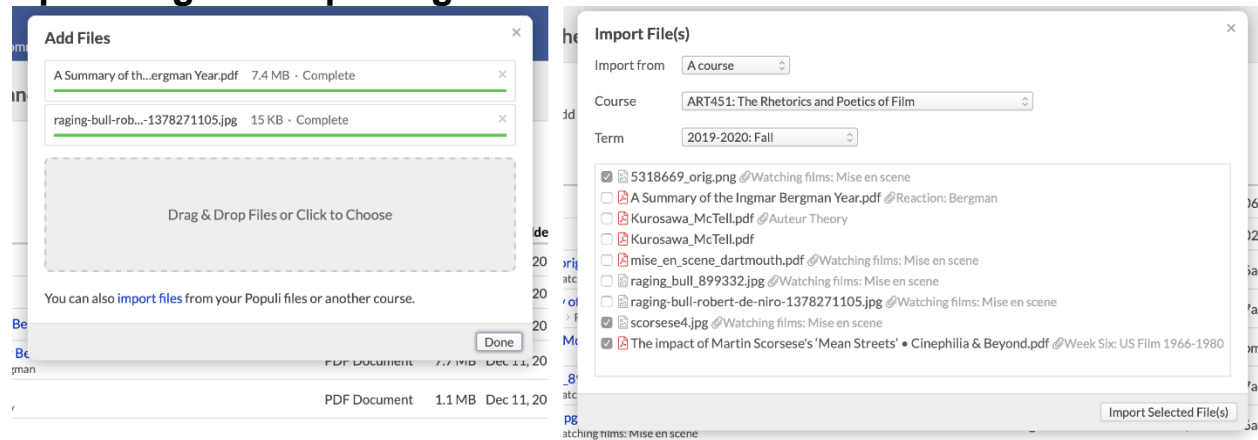
Save

<input type="checkbox"/> Name ▲	Kind
<input type="checkbox"/>  5318669_orig.png	PNG Image
<input type="checkbox"/>  raging_bull_899332.jpg	JPEG Image

Folders let you organize files (and clean up the screen's real estate if you have lots of files in your course).

- Create a new folder by clicking **Add folder** and giving it a name.
- Click a folder to view its files, add more to it, or manage who can access it (and how).

Uploading and importing files



You can upload or import files right from the main Files view or within any folder. You can also import files from your Populi [Files](#) or other courses.

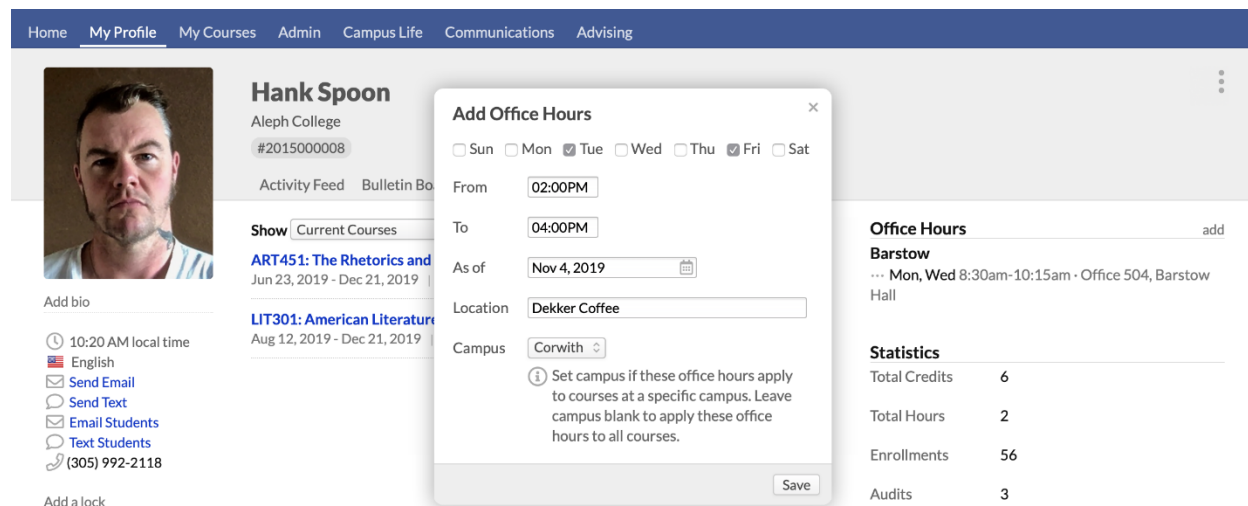
To upload files:

1. Click **Add files**.
2. Drag-and-drop the file or files you're after into the upload area. You can also search for files on your computer.
3. Upload as many files at a time as you wish.
4. When you're done, click... um, **Done**.

To import files:

1. Click **Add files**.
2. In the dialog, click **import files**.
3. Choose the area from which you'd like to import files. *My Files* refers to your Populi [Files](#); you can also choose any course for which you are faculty.
4. Check the files you wish to import.
5. When you're done, click... um, **Done**.

6.19 Adding Office Hours To Your Faculty Profile



The screenshot shows a faculty profile for Hank Spoon at Aleph College. The profile includes a photo, name, college name, and ID. A modal window titled "Add Office Hours" is open, allowing the user to specify days (Sun-Sat), start and end times (From: 02:00PM, To: 04:00PM), a date (As of: Nov 4, 2019), a location (Dekker Coffee), and a campus (Corwith). A "Save" button is at the bottom of the modal. To the right, there are sections for "Office Hours" (Barstow, Mon, Wed 8:30am-10:15am) and "Statistics" (Total Credits: 6, Total Hours: 2, Enrollments: 56, Audits: 3).

Here's how to add office hours so your students know when and where to get ahold of you. Your office hours appear on the [Syllabus](#) view of any course you're teaching.

1. Go to My Profile > Faculty.
2. In the right column, click **Add office hours**.
3. Check the days you'll be available and enter start/end times.
4. Enter the date *as of* which you'll be available for these hours.
5. Type the location—this could be anything from an office in the admin building to the off-campus coffee shop where you do your best work.
6. If these hours are specific to a campus, choose the campus. Otherwise, leave that field blank.
7. When you're done, click **Save**.

After you save these office hours:

- You can add another set of office hours by repeating the above steps.
- Edit office hours by clicking .

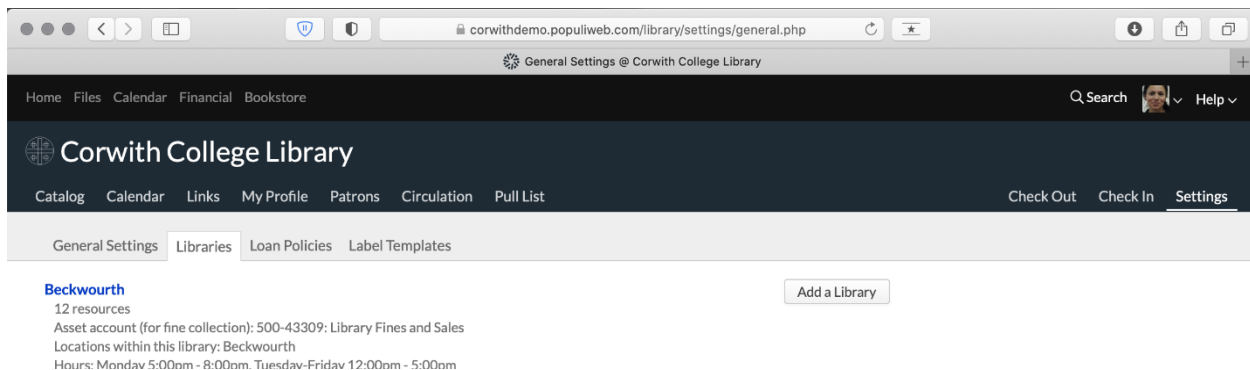
7. Populi Library

Follow

Set up libraries, locations, and loan policies; then add resources and set up patrons so you can start keeping track of your school's library in Populi.

- [Step one: set up libraries and locations](#)
- [Step two: set up loan policies](#)
- [Step three: fill in your library's general settings](#)
- [Step four: start adding resources](#)
- [Step five: set up label templates](#)
- [Step six: enable Library in Account > Customizations](#)
- [Step seven: get acquainted with Library](#)

7.1 Step One: Set Up Libraries And Locations



Libraries and locations are where you keep your library resources, from which you loan them to patrons, and to/from which you arrange transits. Before you do anything else, you should at least add all of your libraries and locations; if need be, you can come back later to add things like library hours, etc.

At this point, your library is hidden from the main Populi navigation. You can get there one of two ways:

- [Library admin users](#) can enter your school's Populi library URL right in your browser. It looks something

like <https://yourschool.populiweb.com/library/settings/general.php>.

- Account administrators can find a link in [Account > General > Customizations](#) under *Enable Library*.

Adding a library

General Settings Libraries Loan Policies Label Templates

Add a Library Save or Cancel

Name

Global Due Date
If set, resources will not be loaned out past this date, even if the loan policy would usually allow a longer loan.

Asset Account for Fine Collection

Locations within this library
 19 resources
[Add a location](#)

Hours

Sunday	<input type="text" value="Time"/>	to	<input type="text" value="Time"/>
Monday	<input type="text" value="05:00PM"/>	to	<input type="text" value="08:00PM"/>
Tuesday	<input type="text" value="12:00PM"/>	to	<input type="text" value="05:00PM"/>
Wednesday	<input type="text" value="12:00PM"/>	to	<input type="text" value="05:00PM"/>
Thursday	<input type="text" value="12:00PM"/>	to	<input type="text" value="05:00PM"/>
Friday	<input type="text" value="12:00PM"/>	to	<input type="text" value="05:00PM"/>
Saturday	<input type="text" value="Time"/>	to	<input type="text" value="Time"/>

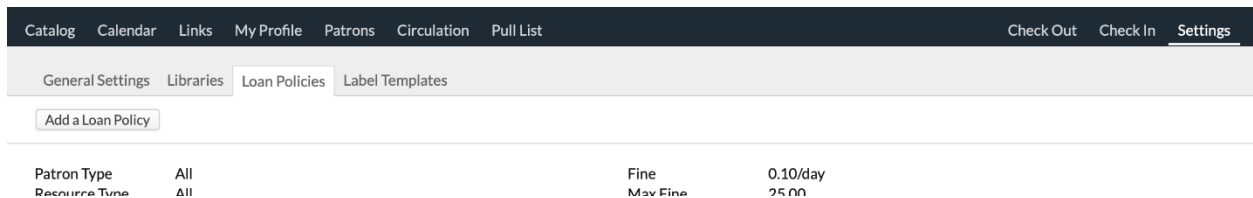
1. Go to Library > Settings > Libraries.
2. Click **Add a library**.
3. Give the library a name.
4. If you wish, you can enter a global due date—by this date, all resource loans from this library will be considered due. If you use this feature, you'll come back here every so often to update this field.
5. Select an asset account for fine collections. You may need to have a financial admin user set up a new account for this purpose.
6. Libraries need at least one location in order to hold resources. Add locations—just click **add a location** and give it a name. Repeat for each location in this library.

7. If you wish, you can set hours for this library. These will display on the main search page that greets all patrons and users who visit your school's Populi Library page.
8. When you're done, click **Save**.

Now that you've added this library and location(s), you have a spot for your resources to live.

Next steps: Start setting up [loan policies](#).

7.2 Step Two: Set Up Loan Policies



The screenshot shows the Populi library management interface. At the top, there is a navigation bar with links for Catalog, Calendar, Links, My Profile, Patrons, Circulation, and Pull List. On the right side of the navigation bar are links for Check Out, Check In, and Settings. Below the navigation bar, there is a sub-navigation bar with links for General Settings, Libraries, Loan Policies, and Label Templates. Under the Loan Policies link, there is a button labeled "Add a Loan Policy". Below this, there is a table with the following content:

Patron Type	All	Fine	0.10/day
Resource Type	All	Max Fine	25.00

Loan Policies describe how different kinds of patrons—Students, Faculty, Staff, and Patrons—can check out resources from your library.

- You can have as many loan policies as you like.
- Populi always looks for the most restrictive loan policy when determining whether a patron can check out a resource. For example, if a Staff member also has the Student role, when he checks out a book that Staff can check out for 30 days but Students for 15, it will choose the 15-day loan period.
- Likewise, Populi looks for the most *specific* loan policy. For example, if you have a loan policy that lets students check out *all* resources for 30 days, and another that lets students check out *movies* for 3 days, then when a student checks out a video, it will be loaned to her for 3 days.

Adding a new loan policy

Add a Loan Policy

Save or Cancel

Patron Type(s) All Choose specific type(s)

Student
 Faculty
 Staff
 Patron

Resource Type(s) All Choose specific type(s)

Music
--

Library All Libraries

Collection/Resource

Loan Period Allow check-out Do not allow check-out

10 Day(s)

Grace Period 2 day(s)

Fine .25 per day

Max Fine 25

Lost After 30 day(s)

Hold Length Allow holds Do not allow holds

Renewal Limit 1

Max Balance 25

Max Checkout 10

1. Go to Library > Settings > Loan Policies.
2. Click **Add a Loan Policy** and fill in the fields you need (all fields in a Loan Policy are optional).
3. These fields determine to whom and what the policy applies:
 - **Patron Type(s):** Choose those to whom this loan policy applies—
all patrons or *specific types*.
 - **Resource Type(s):** Choose those to which this loan policy applies—
all resource types or *specific types*. For multiple types, leave the last drop-down blank when you're done.

- **Library:** Choose either *all* libraries or select a specific one from the drop-down.
 - **Collection/Resource:** Type to search for a particular collection or resource to which this policy applies.
4. Detail fields determine the permissions and penalties of the policy. If the loan policy does not include a specific item, leave it blank—so, if there's no grace period, don't enter anything in that field.
- **Loan Period:** Enter a number of *Hours, Days, Weeks, or Months*. Your selection here also determines the period for the grace period and fine fields.
 - **Grace Period:** Enter the number of *Hours, Days, Weeks, or Months* a Patron has after the due date to return a resource without getting stuck with a fine.
 - **Fine:** Enter the amount in dollars; if you charge a dollar a day, enter *1*; if you charge a dime a day, enter *.10*, if you charge a dollar and a dime a day, enter *1.10*, and so on.
 - **Max Fine:** Once a patron hits this amount in overdue fines, no more will be added to the fines they accrue according to this loan policy.
 - **Lost After:** If the patron hasn't returned the resource by this time after the due date, the resource will be considered *Lost* and the Patron will be charged the replacement cost.
 - **Hold Length:** If you allow holds, patrons can put resources on hold this amount of time before checking them out.
 - **Renewals:** Enter the number of times a patron can renew the resource before it must be reshelfed.
 - **Max Balance:** If a patron has this amount (or higher) of outstanding fines/lost fees, he cannot check out any resources.

- **Max Checkout:** Enter the maximum number of resources a patron can check out at a given time.
5. When you're done, click **Save**.

Now that you've added this loan policy, it's ready to enforce when patrons begin checking out resources from your library.

Next steps: [fill in your library's general settings](#).

7.3 Step Three: Fill In Your Library's General Settings

The screenshot shows a navigation bar with links: Catalog, Calendar, Links, My Profile, Patrons, Circulation, Pull List, Check Out, Check In, and Settings. Below the navigation bar is a sub-menu with links: General Settings, Libraries, Loan Policies, and Label Templates. The 'General Settings' section is active, showing the 'Library Fines Fee' setting. The text reads: 'Library Fines Fee' followed by 'Select a fee to use for library fines. If necessary, contact a Financial Admin to create an appropriate fee.' Below this is a dropdown menu currently set to 'Library Late Fine' and a 'Save Settings' button. Below the dropdown is the 'Library greeting message' section.

In general settings, you can fine-tune Populi Library to best fit your school's needs.

Library fines fee

Select a Fee to use when charging Library-related fines (such as late fees or a replacement price). If necessary, have a Financial Admin create the appropriate fee before you change this setting.

Some notes for financial users on fees for library fines:

- When setting up the fee, set the type to *Flat Rate* and the amount to *0*.
- Connect the main library fines fee to an income account.
- Each [library](#) also needs its own asset account for fee collection.
- [This article](#) describes how fees are handled—how they're levied, how they're paid, and how they're waived.

Library greeting message

The greeting message displays on the main search page that greets all patrons and users who visit your school's Populi Library page. You can use [text formatting](#) in the greeting.

Disable Amazon.com integration

Library retrieves cover images and other information for your resources from Amazon.com's catalog (perhaps the highest-quality source of such information). However, because Amazon makes this information available via its [Product Advertising API](#), Populi Library must display a *Buy from Amazon* link on the resource page. Understandably, you may not want this displayed on your Library.

To disable this integration, select **Yes**.

Disable automatic barcode generation

When you add new resource copies, Populi automatically generates and adds the next available barcode for that copy. If you wish to disable this feature, select **Yes**.

Lost resources email notification list

When a resource copy is marked as *Lost*, the people listed here will receive an email. Separate multiple addresses with a space or a comma.

Z39.50 Servers


When adding new resources to your Library, Populi searches a variety of online library databases for resource information (as well as Amazon for cover images) using the Z39.50 protocol.

Populi includes links to five public Z39.50 servers: Library of Congress, New York Public Library, OhioLINK, Washington State University, and Yale University. Login credentials are included for each server.

You can specify any number of Z39.50 servers for Populi to search. Here's how to add a new one:

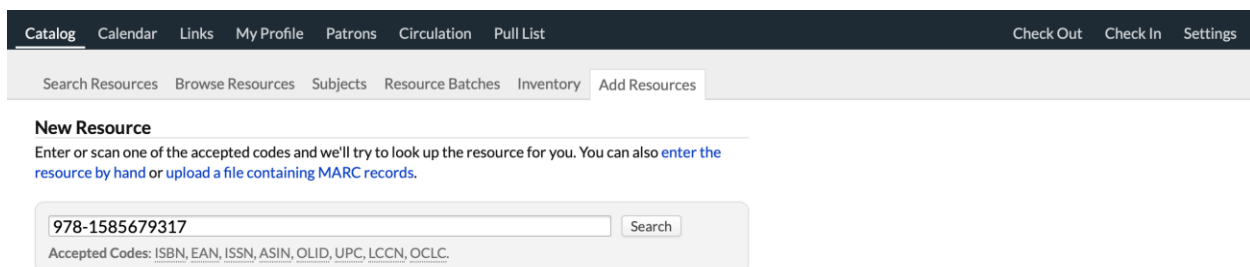
1. Click **add server**.
2. Fill in the information requested. Details like host, database, etc. should be available from the source library.
3. Check *enabled*.
4. Click **Save** to finish adding the server.

Now that you've added this server...

- Click the server name to edit any of its details and enable/disable it.
- Click *reorder servers* to change the order in which Populi searches these servers for resource information.
- *Test Server* submits a packet of information to see whether the server is working.
- *The date* shows the last time you asked that server for information about a resource (or sent a test).
- Click  to remove the server from your list altogether.

Next steps: [add some resources...](#)

7.4 Step Four: Start Adding Resources



A *resource* is information about a particular item available in your Library. They cannot be checked out, reserved, transferred, etc. *Copies* are the actual, physical artifacts available somewhere on your shelves, whether available for loan, reserve, transit... or not at all. You can also keep digital resources for a Resource—say, MP3 files for a *music* Resource, or a PDF for an *article* Resource.

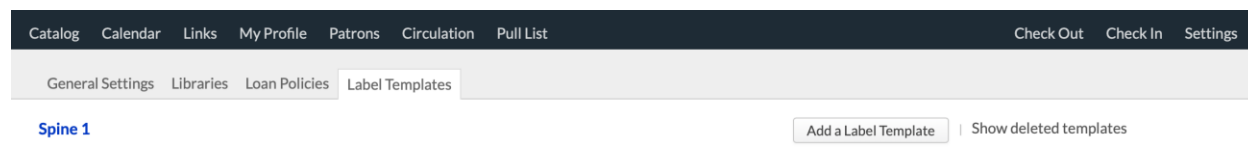
There are a few ways to get resources into your Library:

- If you have extensive MaRC records from a previous library system, [contact Populi customer support](#). We're happy to help you import your records into Populi.
- If you have smaller MaRC files, you can upload those into Populi yourself in Catalog > Add Resources.
- You can also add resources one at a time, again in Catalog > Add Resources.

Read more about [adding resources and copies](#).

Next step: [set up some label templates...](#)

7.5 Step Five: Set Up Label Templates



Label templates let you set up standard layouts for things like spine or barcode labels. After creating templates, you can export a PDF based on a template that contains the label data for your resources. For example, you may run a resource batch where you change the home library of several hundred books; you can then print labels for all those resources based on one of your templates.

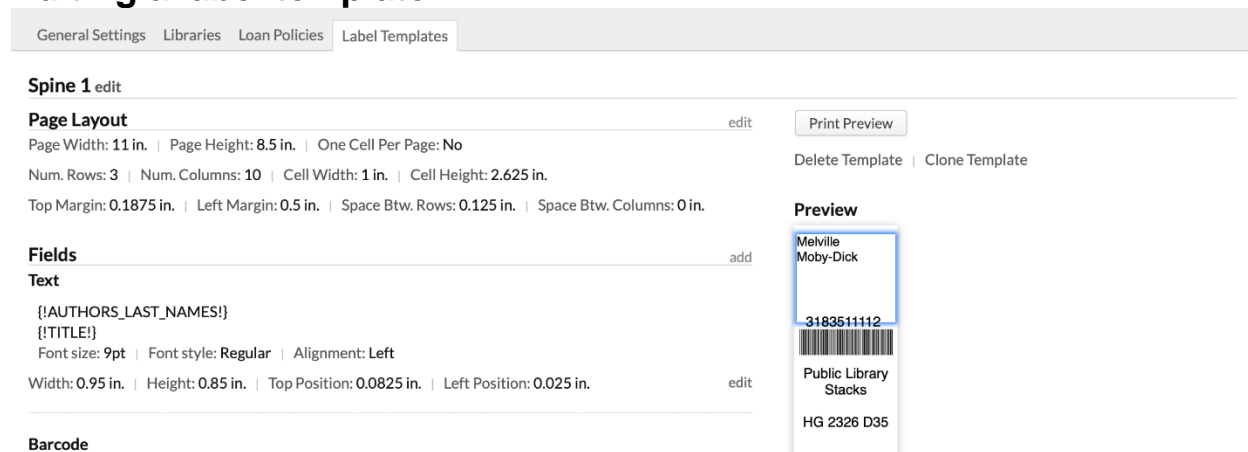
Read about how to [print library labels](#).

Creating a label template

1. Go to Library > Settings > Label Templates.
2. Click **Add a Label Template**.
3. Give the label a name— *Avery 5260* or *Dymo 30347* or *CD/DVD*, for example.
4. Click **Save**.

As soon as you save, you'll be taken to the template editor page.

Editing a label template



Label templates require you to define two areas:

- **Page layout** refers to the overall dimensions of the label sheet and the size and arrangement of the individual labels. You can get these dimensions from the label manufacturer. If used for vertical spine labels, the [Avery 5260](#) has:
 - 3 *Rows* of labels in 10 *Columns*
 - A *Top Margin* of 0.1875 inches and a *Left Margin* of 0.5 inches
 - 0.125 inches of *Space Between Rows* and No *Space Between Columns*
- These dimensions determine where your printer will lay down the ink. Say you got rid of that half-inch left margin: every label you print onto an Avery 5260 sheet would be positioned a half-inch off.
- **Label fields** are the blocks of resource information included on each label. These items have to be arranged so that they fit on one, single printed label.

The first thing to do with a label template is to edit the page layout dimensions.

Edit Page Layout X

Dimensions Custom ▾

Width 11 in.

Height 8.5 in.

One Cell Per Page

Num. Rows 3

Num. Columns 10

Cell Width 1 in.

Cell Height 2.625 in.

1. Click **edit** next to Page Layout.
2. Enter or edit values for the fields you need to change. The cell width and height determine the overall dimensions you'll be using for your label fields.
3. If this is a template for a roll of labels, make sure to check *one cell per page* (leave unchecked if this is a sheet of labels).
4. Click **Save** when you're done.

Label fields

Add Field [X]

Type: Text

Content: Variables: Authors [Insert]

{!LIBRARY!}
{!LOCATION!}

{!CALL_NUMBER!}

Font Size: 10pt [v] Font Style: Regular [v] Alignment: Center [v] Color: 000000 [v]

Width: 0.95 in. [v]

Height: 1.25 in. [v]

Top Position: 1.35 in. [v]

Left Position: 0.025 in. [v]

[Delete] [Save]

HG 2348 D74

Label fields let you specify the label's content and appearance.

1. Click **add** next to Fields.
2. Choose whether this is a *Text* or *Barcode* field. You can only have one barcode field per label template.
3. Enter your content. You can include variables like author name, title, etc. You can also type text. Format the content with font size, color, and alignment.
4. Enter the width and height in inches; you can use up to four decimal places (e.g. 1.6225). Make sure these fit inside the cell width/height!
5. Likewise, enter top and left position in inches (up to four decimals...). These fields take some finessing:
 - o Top: Your first label field should probably be at 0 inches; subsequent fields should take into account the *height(s)* of the previous fields. A good rule of thumb: add the *height* and *position top* of the previous field(s) to get the *minimum* position top for your new field.

- Left: Generally, 0 will work for everything, but if you wanted to put some fields side-by-side, then subsequent fields should take the other fields' *width(s)* into account.

6. Click **Save**.

You'll see the field in the preview in the right column of the screen. If you need to adjust a field, hover over it and when you see the blue highlight, click it.

Previewing

As you save your label fields, you'll see a preview in the right column. Provided your monitor is not set up with some strange configuration, the preview is roughly the size of the actual printed label. The preview will help you make tweaks and adjustments to your label fields and their positions relative to one another.

- Click **Print Preview** to test your label template with random selections from your catalog.
- **Clone label** lets you create a new label template based on the one you're working with.

Next steps: [enable Library and get acquainted with all its functions](#).

7.6 Step Six: Enable Library In Account > Customizations

Once you've laid the groundwork for using Populi Library and you're ready to let students, faculty, patrons, and other users to access it, your school's Populi Account Administrator will need to enable it.

To enable it:

1. Go to Account > Account Settings > Customizations.
2. Under *Enable Library*, select Yes.
3. Click **Save Settings**.
4. The page will re-load. Once it does, you'll see a new *Library* link in Populi's top-level navigation bar (the black bar at the top). So will all your users!

Next: [get acquainted with Populi Library...](#)

7.7 Step Seven: Get Acquainted With Library

You've already set up your library and have acquainted yourself with adding resources and copies. Here are links to articles and videos that walk you through day-to-day use of Populi Library.

Catalog

Catalog is where you create, organize, and search for resources and copies.

Read about the [library catalog](#) and [view the videos...](#)

Links

Links take you to an external website. They are accessible to all your patrons and visitors. They provide a way to create a useful resource for your school—for example, a list of links to other local schools with public libraries or other educational institutions.

Read about [library links...](#)

Patrons

A patron is anyone who can check out a resource copy from your library. Patrons can take resources on loan, place holds, leave recommendations and reviews, and be charged fines. All of this information (as well as contact info) can be found on a patron's library profile (you have a profile, too).

Read about [patrons and library profiles](#) and [watch the videos...](#)

Circulation

The Circulation tab features a number of circulation-related reports (active loans, transits, etc.). The term "circulation" also refers to tasks like the pull list and checking resources in and out for patrons.

Read about [circulation \(reports and tasks\)](#) and [watch the videos...](#)

8. Setting Up Your Bookstore

There are two ways you can operate Bookstore

With credit cards

If you enable credit cards as an online payment method, then you can...

- Sell items through both the Point of Sale and the online shopping cart
- Use all of these payment methods: cash, check, credit/debit card, and charge-to-student-account

Without credit cards

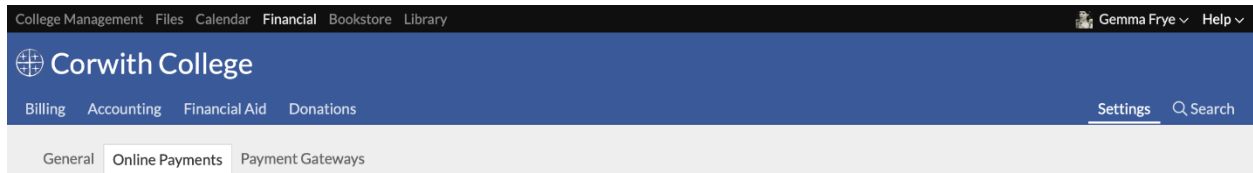
If you do not enable credit cards, then you can...

- Sell items through Bookstore only via the Point of Sale
- Use these two payment methods: cash and check

The Bookstore setup process

1. If you're going to accept credit cards, start by going through the [online payments setup process](#).
2. You fill in the required Bookstore settings. Even if you're not taking credit cards, you'll need to fill in the Refund and Privacy Policy settings from Step 1.
3. Your Populi account administrator goes to Account > Customizations and checks Yes to enable Bookstore (only after Step 1 is completed).
4. You add items and test out a few sales processes to get started; afterwards, you start taking orders!

Step 1: Set up online payments



Asset account for cash payments (Required)
Choose a valid asset account for cash payments.

Save Settings

If you wish to accept credit cards and use Bookstore's shopping cart features, a Financial Admin user must complete the [online payments setup process](#) in Financial > Settings > Online Payments.

If you wish to only use Point of Sale and accept cash and checks, you need only fill out the Refund Policy and Privacy Policy fields in online payments; afterwards, you can move on to Step 2.

Step 2: Fill in Bookstore settings



Find Order #
 Go

Dashboard
Pending Orders
Returned Items
Add Inventory
Add Item

Reports
Sales
Orders
Items
Inventory
Term Book List

Setup
Categories
Shipping Methods
Discount Codes
Return Reasons
Settings

Bookstore Settings

Save Settings

Payment methods

Check the payment methods you wish to accept for bookstore purchases. To use credit cards, you must first set up a payment gateway in Financial > Settings.

- Cash
- Checks
- Credit Cards

Apply tax to shipping

Select "Yes" to charge your state tax rate to shipping charges.

- Yes No

Bookstore greeting message

Your customers will see this message on the Home view of your Bookstore.

Welcome to the Corwith College Bookstore! In addition to shopping here, you can also visit our physical location at 390 West Allard Street Mon - Sat, 9AM to 6 PM.

Default income account

Select the income account in which you wish to record Bookstore purchases. You can change this for individual items.

60094: Bookstore

Getting into Bookstore to set it up

You start setting up Bookstore by going to Bookstore Settings. There are two ways to get there:

- Enter `https://yourschool.populiweb.com/bookstore/admin/settings.php` (replace "*yourschool*" with your school's unique Populi site abbreviation) directly into your browser.
- If you're a Populi Account Administrator:
 1. Click Account in the upper right corner of the screen.
 2. In the left column, click Account Settings and then Customizations.
 3. Scroll down to the *Enable Bookstore* setting; click the Bookstore link.
 4. Click Admin in the upper right of the screen.
 5. Click either *Go to Bookstore settings* (under the "Bookstore disabled" message) or Settings (in the left column under *Setup*).

Payment methods (Required)

Check the payment methods you wish to accept for bookstore purchases. *Credit Cards* will be automatically selected after you've set up one or more payment gateways in Financial > Settings. If you're not taking credit cards, then your shoppers will not be able to use your online shopping cart—but you'll be able to make sales through Bookstore > Point of Sale.

Apply tax to shipping

Several US states require the merchant to pay sales tax on the total order amount, including shipping. Look into your state regulations and check this box if you are required to do so.

Bookstore greeting

Your customers will see this message on the Home tab of your Bookstore. You can use [text formatting](#) in the greeting.

Default income account (Required)

Enter the income account number (from your [Chart of Accounts](#)) that you wish bookstore purchases to affect by default (this can be overridden for individual items).

Sales tax payable account

Enter the liability account number (from your [Chart of Accounts](#)) in which you wish sales tax charges to be recorded. If set, sales tax will be automatically split out from actual Bookstore purchase income. If blank or invalid, the entire amount of all purchases will be recorded as income in the default income account.

Inventory cost flow

Does your accountant use the first-in, first-out (**FIFO**) method, or last-in, first-out (**LIFO**) method for calculating the value of bookstore inventory?

Inventory asset account

Select the [asset account](#) in which you will track the value of your unsold inventory. The balance of this account will be calculated according to the method you choose in the *Inventory cost flow* setting.

Inventory purchases account

Select the [asset account](#) in which you will track the value of inventory purchases.

Inventory shrinkage account

Select the [expense account](#) in which you will track the value of inventory shrinkage. The balance of this account will be calculated according to the method you choose in the *Inventory cost flow* setting.

Cost of goods sold account

Select the [expense account](#) in which you will track the cost of goods sold. The balance of this account will be calculated according to the method you choose in the *Inventory cost flow* setting.

Send order notification emails to:

If you wish (for what it's worth, we strongly recommend this!), enter an email address (or multiple addresses, separated by commas) to receive order notifications. If you use a third-party fulfillment service, enter that email address here.

Shipping income account

Enter the income account number (from your [Chart of Accounts](#)) in which you wish bookstore shipping charges to be recorded. If set, shipping charges will be automatically split out from actual Bookstore purchase income. If blank or invalid, the entire amount of all purchases will be recorded as income in the default income account.

Shipping on account fee

Select a fee to which Bookstore can pin any shipping charges on an order that a student charges to his account. We heartily recommend [setting up a unique fee](#) for this purpose ("Bookstore Shipping", f'rinstance).

Start Point of Sale in scanning mode

This is helpful if you have a barcode scanner or credit card reader attached to your computer.

Student Charge to Account Limit

Enter the maximum amount (in dollars) that students may charge to their accounts (that is, to roll their Bookstore purchase amounts into their regular Populi invoices). Only fill out this option if you're using credit cards as a payment option!

Tax Rate

What is your state sales tax (or Canadian VAT) rate?

Tax on account fee

Select a fee to which Bookstore can pin any Sales Tax charges on a Bookstore order that a student charges to his account. We heartily recommend [setting up a unique fee](#) for this purpose ("Bookstore Tax", f'rinstance).

Tax State

List all states in which your institution has a physical presence. Enter the standard State abbreviations (TX, MN, IA, etc.), and if more than one, separate them with commas. Customers with

billing addresses in the states listed will be required to pay sales tax on their purchases. Leave this field blank to make tax apply to all states.

Tax by ZIP code

Tax by ZIP Code

If additional taxes must be collected on orders *shipped* to addresses in certain ZIP codes, enter the additional tax rate here as a percentage (e.g. 5.2%) These taxes will be collected in addition to any other taxes.

For ZIP code	<input type="text" value="27006"/>	collect an additional	<input type="text" value="2"/>	% sales tax.	
For ZIP code	<input type="text" value="27007"/>	collect an additional	<input type="text" value="2.25"/>	% sales tax.	<input type="button" value="X"/>
For ZIP code	<input type="text" value="27516"/>	collect an additional	<input type="text" value="2.75"/>	% sales tax.	<input type="button" value="X"/>
For ZIP code	<input type="text"/>	collect an additional	<input type="text" value="0"/>	% sales tax.	<input type="button" value="X"/>

Some states allow local governments (city, county) to impose additional sales taxes for online purchases shipped to those ZIP codes ([North Carolina](#), for example).

1. Enter the ZIP code and additional sales tax percentage.
2. Additional fields will appear. If you don't need to enter any more ZIP codes, leave the last one blank.
3. Click **X** to delete a ZIP code from the list.

Step 3. Get Bookstore ready for customers

 **Corwith College Bookstore**

Home Books Clothing Recordings Swag Point of Sale Admin 

Find Order #

Dashboard

Pending Orders

Returned Items

Add Inventory

Add Item

Reports

Sales

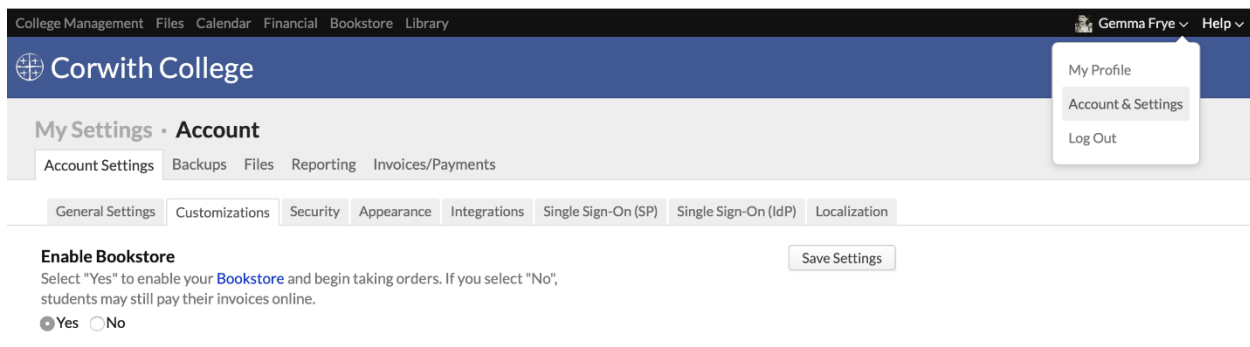


Name	<input type="text" value="The Complete Stories: Flannery O'Connor"/>
Description	<input type="text" value="*Winner of the National Book Award*"/> <input type="text" value="The publication of this extraordinary volume firmly established Flannery O'Connor's monumental contribution to American fiction. There are thirty-one stories here in all, including twelve that do not appear in the only two story collections O'Connor put together in her short lifetime--Everything That Rises Must Converge and A Good Man Is Hard to Find."/>
Status	<input type="text" value="Visible to shoppers"/>
Category	<input type="text" value="Course Reading"/>
Taxable	<input checked="" type="checkbox"/>
ISBN	<input type="text" value="978-0374515362"/> (books only)

Getting your Bookstore ready for your customers involves setting up items like shipping, discount codes, return reasons, and, of course, adding items to your inventory (so you have something to sell!).

- [This article](#) covers shipping, discount codes, and other such things.
- [This article](#) covers items and inventory.

Step 4. Enable Bookstore



The screenshot shows the 'Enable Bookstore' settings page in the Populi system. At the top, there is a navigation bar with links for 'College Management', 'Files', 'Calendar', 'Financial', 'Bookstore', and 'Library'. The user's name 'Gemma Frye' and a 'Help' dropdown are on the right. Below the navigation bar is the 'Corwith College' logo and the 'My Settings' section, which is currently set to 'Account'. Under 'Account', there are tabs for 'Account Settings', 'Backups', 'Files', 'Reporting', and 'Invoices/Payments'. The 'Account Settings' tab is active, and within it, there are sub-tabs for 'General Settings', 'Customizations', 'Security', 'Appearance', 'Integrations', 'Single Sign-On (SP)', 'Single Sign-On (IdP)', and 'Localization'. The 'Enable Bookstore' section is highlighted, with a 'Save Settings' button to its right. The text reads: 'Enable Bookstore. Select "Yes" to enable your Bookstore and begin taking orders. If you select "No", students may still pay their invoices online.' Below this text are two radio buttons: 'Yes' (which is selected) and 'No'.

Your school's Populi account admin must go to Account > Customizations to check this setting.

Once checked, your Bookstore is active and ready to accept orders. Until you do this, your Bookstore will not accept any orders.

Now that it's all live...

After logging back in, Populi will do a few new things.

Getting to bookstore

Anyone can navigate to your your Bookstore

via `https://yourschool.populiweb.com/router/bookstore`. You can make it easy on everyone by linking to it from your school's website. Users will also be able to navigate to the Bookstore within Populi:

- The top-level navigation (College Management & Financial) now also shows the Bookstore link:



- ISBN's establish links between courses and your Bookstore. If course instructor includes the ISBN in his reading list entry, and you've entered the same ISBN for a bookstore item, students can link directly to the Bookstore from the course and find those reading list items for purchase:

Reading List

Required Books

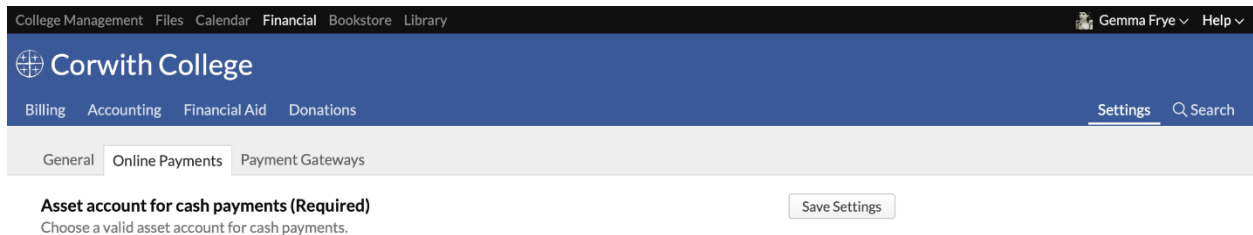
- [Conversations with Walker Percy \(Literary Conversations\)](#)
- [The Complete Stories \(FSG Classics\)](#)

[Click here to go to the bookstore](#)

9. Setting Up Donations

To set up Donations, you'll need the Financial Admin role.

Step 1: Taking online donations? Set up credit card processing with Populi

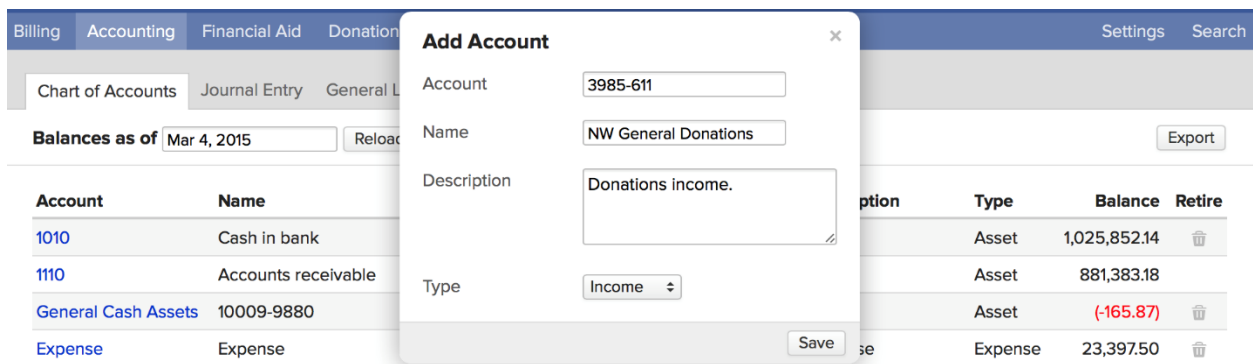


First things first: to accept online donations, you'll need to get set up to accept credit card payments through Populi.

- If you've already set this up, just proceed to Step 2.
- If you haven't yet, [get started here](#).
- If you're planning to use Populi Donations simply to keep donation records, you can skip this step altogether.

Stripe offers a [non-profit discount](#) for charitable donations. If you get a separate Stripe account to process donations, you could point Donations at that account when you set up your [payment gateway](#). Contact Stripe to see if your school qualifies for the non-profit pricing.

Step 2: Lay the groundwork in your Chart of Accounts



In Financial > Accounting > Chart of Accounts, [set up one or more income accounts](#) to which you'll route funds collected through Donations (see Step 6). You may also wish to set up unique asset accounts for donation funds. (If you wish to allow donors to donate directly to particular scholarship accounts, you may also want to set up liability accounts for those scholarships if you haven't already.)

Step 3: Set up one or more funds

The screenshot shows the 'Add a Fund' dialog box in the Corwith College system. The dialog box is open over a background page showing a list of funds: Beveridge Scholarship, DeGenevieve Memorial, Facilities: Concert Hall, and Fox Scholarship. The 'Add a Fund' button is highlighted with a red box. The dialog box contains the following fields: Name (General Scholarship), Account (234099: General Scholarship Fund), Tax Deductible (checked), Show Online (checked), and Default Fund (unchecked). A 'Save' button is at the bottom right of the dialog box.

Funds designate a use for donations. For example, the "Skinner T. Peabody Memorial Scholarship Fund" provides the money for the Skinner T. Peabody Memorial Scholarship. The "General Fund" provides money for general use by your school. And so on. When donors send you money, they'll have some way to designate which fund they're donating to. Fund names also appear on donation receipts.

Go to Donations > Settings > Funds and click **Add a Fund**.

1. Give the Fund a name. This is what your donors will see when they're making an online donation.
2. Select an Income Account from Step 2 (or another appropriate income account).
3. Check to make this your default fund. If you only have one fund, that will automatically be your default fund...

Step 4: Set up one or more pages for online donations

The screenshot shows the 'Donations' settings page, specifically the 'Pages' tab. The top navigation bar includes 'Billing', 'Accounting', 'Financial Aid', 'Donations', and 'Settings'. Below this, a secondary navigation bar shows 'Dashboard', 'Campaigns', 'Donations: 35', 'Donors', 'Recurring', and 'Settings'. The main content area has tabs for 'Funds', 'Pages', 'Appeal Media', 'Custom Fields', and 'General'. Under the 'Pages' tab, there are two sections: 'Default donation page' and 'Class of 2020 Fundraiser'. Each section has links for 'Open page' and 'Get embed code'. An 'Add a Page' button is located to the right of the 'Default donation page' section. A grey informational box on the right states: 'Online donations are accepted through donation pages. Each page has a unique URL you can link to or embed on your website. You can customize them by linking them to campaigns, appeals, and funds.'

Pages let you collect online donations (see Step 1!). You can send donors directly to a page's unique URL, or you can embed the page within another web page.

Go to Donations > Settings > Pages and click **Add a Page**. Read more about [setting up pages here](#).

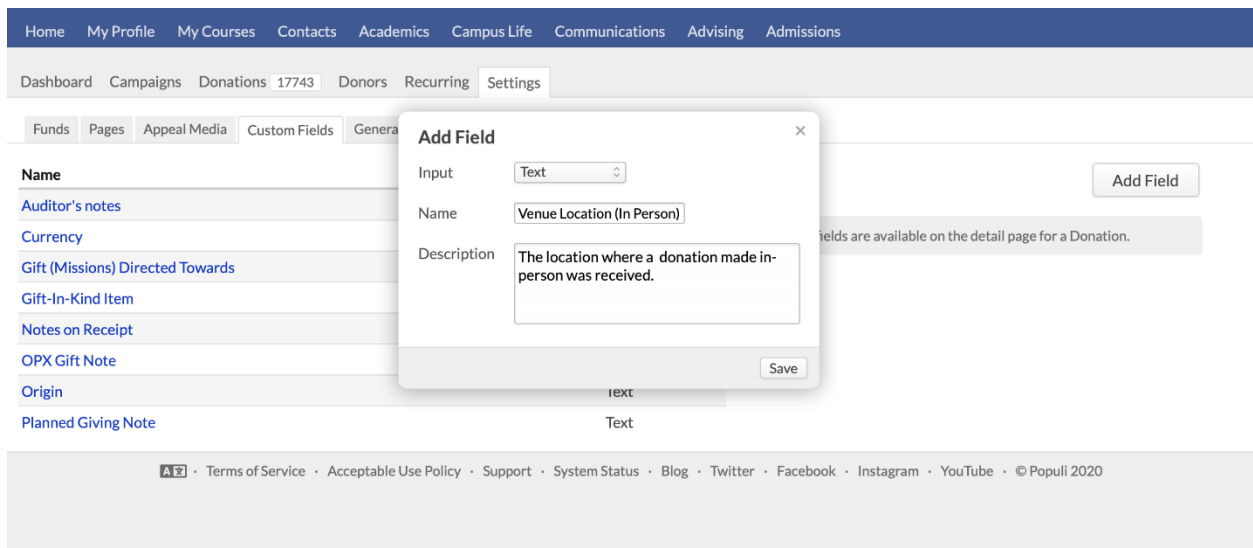
Step 5: Add some appeal media

The screenshot shows the 'Add an Appeal Medium' dialog box overlaid on the 'Appeal Media' tab of the Donations settings page. The dialog box has a close button (X) in the top right corner. It contains two input fields: 'Name' with the value 'Mailer/Brochure' and 'Status' with a dropdown menu set to 'Active'. A 'Save' button is located at the bottom right of the dialog box. In the background, the 'Appeal Media' tab is active, showing a table with columns 'Medium' and 'Status'. One row is visible with 'Phone Call' in the 'Medium' column and 'Active' in the 'Status' column. An 'Add an Appeal Medium' button is also visible in the background.

Appeal media are things like postcards, email, mailings, fundraising events, etc., that you use to broadcast particular appeals within fundraising campaigns. You use appeals to learn about which fundraising approaches get you the most proverbial bang for your buck. For example, you might set up *Phone call* and *Email* media. During a campaign, you include two appeals—one an email blast to some alumni, and the other a phone call appeal to other alums. At the close of the campaign, you learn that the phone call appeals were far more effective than the email blasts, and you take note of that for future campaigns.

Go to Donations > Settings > Appeal Media and click **Add an Appeal Medium**. Give the medium a name and click **Save**. If you ever need to stop using a particular medium, just come back here, click the medium, and set its Status to *Inactive*.

Step 6: Add custom donations fields



Custom donations fields let you add your own data to individual donations. Once they're created, you add them on a donation's detail page. After added to donations, they're available for export in the various reports in Donations.

Start by going to Donations > Settings > Fields.

It's best not to use custom information fields for information that Populi already tracks. This results in duplicate, inconsistent, and/or missing information. Only create a custom field once you are sure Populi's standard fields cannot store the information you need!

1. Click Add Field.
2. Select the input. Your options are:

- **Integer/decimal:** *Integer* creates a number-entry field. *Decimal* creates a number-entry field that accepts decimals. These inputs *reject* regular text—letters and punctuation.
 - **Text:** Creates a 255-character text-entry field that accepts letters, numbers, and punctuation.
 - **Select:** Creates a list of options to choose from a drop-down menu. Type the options in the value field and click **Add** to list them.
 - **Date, Date/Time:** *Time* gives you standard month, day, and year fields. *Date and Time* includes an additional time field.
 - **Checkbox:** Checkbox fields let you select one or more options from a list. Type the options in the value field and click **Add** to list them.
 - **Radio:** Radio fields let you select only one option from a list. Type the options in the value field and click **Add** to list them.
 - **File:** Creates a custom file upload space.
 - **Text Area:** Creates a big ol' text-entry field that accepts letters, numbers, and punctuation.
- Give the field a name.
 - Enter a description—this could be instructions for completing the field.

Now that you've created this field, you can add it to any donation record.

Step 7: Fill in the remaining Donations settings

The screenshot shows a web application interface for managing donations. At the top, there is a dark blue navigation bar with the following menu items: Billing, Accounting, Financial Aid, Donations (which is highlighted), and Settings. Below this is a light gray breadcrumb trail: Dashboard > Campaigns > Donations 44 > Donors > Recurring > Settings. Underneath the breadcrumb trail are several tabs: Funds, Pages, Appeal Media, Custom Fields, and General (which is selected). The main content area is titled "Asset account for online donations via credit card" and includes a "Save Settings" button. Below the title is a descriptive text: "Choose an asset account for credit card donations. This field must be set in order to accept online donations." A dropdown menu is visible, currently showing "Credit Cards".

To finish up, go to Donations > Settings > General. Here's where you'll tie in the income accounts you set up in Step 2, set up email notifications, and enable online donations. Of course, you can come back here at any time to update any of these settings.

1. Select default asset accounts (from your chart of accounts) for online, cash, check, and e-check donations (see Step 2).
2. Enter email addresses for those who would like online donation notifications.
3. The minimum online donation amount lets you require that all online donations be above a certain amount. While you can leave this blank, keep in mind that credit card processors charge a small percentage for every transaction. If someone "donated" \$0.25, you'd end up losing money on that transaction!
4. If you have [a Stripe payment gateway](#) used for donations, you can check to enable recurring donations. You can also enter optional text for an email to be sent to the donor every time you run a charge for a donation.
5. Check to enable online donations. You need to have set up at least one Fund to be able to do this.
6. If you wish to automatically give a soft credit to a donor's spouse, check *Yes*.
7. If you're using Stripe as a payment gateway, you can enable two extra security measures for credit card donations. The CVV setting requires the donor to enter the three-digit number on the back of the card; the Postal Code setting requires that the donor enter the ZIP code of the card's billing address. Enabling the Postal Code setting will most likely cause international credit card donations to fail—U.S. schools should only enable this if your donations come from U.S. donors.

When you're done, make sure to scroll up and click **Save Settings!**

10. Setting Up Campus Life

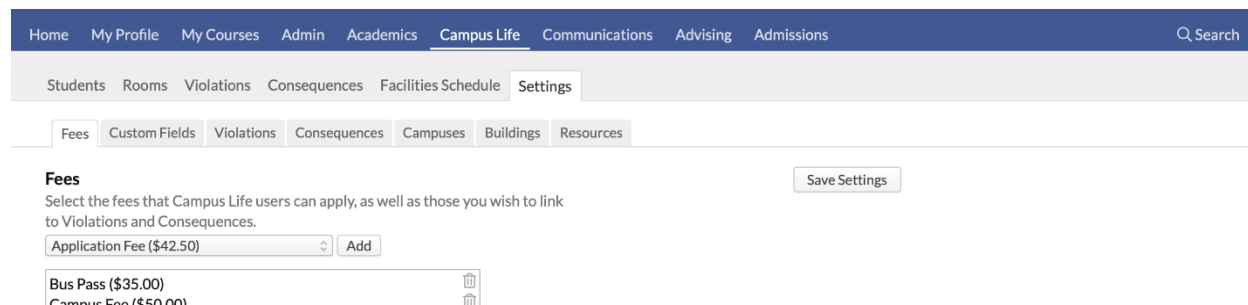
Campus Life lets you add selected fees to students, manage room and board assignments and charges, and track violations and consequences (say, parking tickets or student code violations). In this guide, you'll learn how to set up the basic items your Campus Life staff will be using.

Who can set up Campus Life?

Campus Life > Settings is divided among seven different sections. Here's who can access each section:

- **Campus Life** users do not have access to any of the settings pages.
- **Financial Admin** users can set up Fees, Campuses, Buildings, and Resources.
- **Academic Admin** and **Registrar** users can set up Fields, Violations, Consequences, Campuses, Buildings, and Resources.

Step 1: Set up fees



The screenshot shows the Campus Life Settings page for Fees. The navigation bar includes Home, My Profile, My Courses, Admin, Academics, Campus Life (selected), Communications, Advising, and Admissions. A search bar is on the right. Below the navigation bar, there are tabs for Students, Rooms, Violations, Consequences, Facilities Schedule, and Settings (selected). Under the Settings tab, there are sub-tabs for Fees, Custom Fields, Violations, Consequences, Campuses, Buildings, and Resources. The Fees section is active, showing a 'Save Settings' button and instructions: 'Select the fees that Campus Life users can apply, as well as those you wish to link to Violations and Consequences.' There is a search box with 'Application Fee (\$42.50)' and an 'Add' button. Below, a list of fees is shown, including 'Bus Pass (\$35.00)' and 'Campus Fee (\$50.00)'.

Here, you'll select the fees that Campus Life users can apply to student accounts, as well as those you wish to link to Violations and Consequences. Keep in mind that Campus Life fees are term-agnostic, and if there are any fees that *must* be connected to an academic term, you likely shouldn't add them here.

1. Select a fee from the drop-down. These are the fees [you set up in Financial > Settings > Fees](#).
2. When you've selected the fee, click **Add** to list it.
3. Click **Save Settings** when you're finished.

4. Remove a fee from this list by clicking (again, you'll need to follow this step by clicking **Save Settings**).

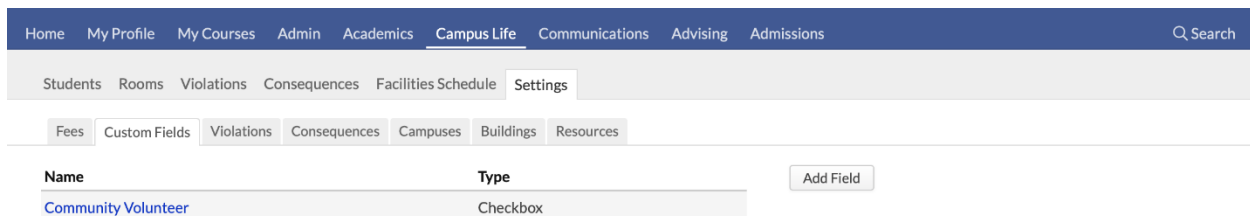
Now that you've listed these fees:

- Campus Life users can now apply these fees to student accounts. They can do so both on Profile > Campus Life and by using the *Add Fee* workflow on the Campus Life > Students report (they still need to be invoiced by a Student Billing user on Profile > Financial > Dashboard).
- You can connect these fees to violations and consequences (see below).

Something to keep in mind: when you create a room/meal plan, it creates a corresponding fee in Billing > Settings > Fees. This may seem counterintuitive, but we recommend *against* adding these corresponding fees to Campus Life. Here's why:

- Campus Life fees are term-agnostic, and typically, room and meal plan fees are typically connected to a specific term.
- Campus Life users can add room and meal plans themselves; this ensures that the fees generated by those plans get linked to a specific academic term.

Step two: set up custom fields



The screenshot shows the Campus Life interface. At the top, there is a navigation bar with links: Home, My Profile, My Courses, Admin, Academics, **Campus Life**, Communications, Advising, Admissions, and a search icon. Below this is a sub-navigation bar with links: Students, Rooms, Violations, Consequences, Facilities Schedule, and **Settings**. Under the Settings bar, there are tabs for: Fees, Custom Fields, Violations, Consequences, Campuses, Buildings, and Resources. The 'Custom Fields' tab is active. Below the tabs, there is a table with two columns: 'Name' and 'Type'. The first row shows 'Community Volunteer' under 'Name' and 'Checkbox' under 'Type'. To the right of the table is an 'Add Field' button.

Name	Type
Community Volunteer	Checkbox

Custom fields let you track Campus Life-related information about people. When creating custom fields, do your best to not duplicate any existing information fields (custom or otherwise)!

1. Click **Add Field**.
2. Select the *Input*:


- **Integer or Decimal:** *Integer* creates a number-entry field. *Decimal* creates a number-entry field that accepts decimals. These inputs *reject* text and punctuation.
 - **Text:** Creates a 255-character text field that accepts letters, numbers, and punctuation.
 - **Select:** Creates a list of options to choose from a drop-down menu. Type the options in the *Value* field and click **Add** to list them.
 - **Date, Date/Time:** Creates fields that accept month, day, year, and time entries.
 - **Checkbox:** Creates a list of options. Checkbox lists let you select one or more options from a list. Type the options in the *Value* field and click **Add** to list them.
 - **Radio:** Creates a list of options. Radio lists let you select only one option from a list. Type the options in the *Value* field and click **Add** to list them.
 - **File:** Creates a file upload area.
 - **Text Area:** Creates a large text field that accepts letters, numbers, and punctuation.
- Enter the field's name and description.
 - Click **Save** to create the field.

Now that you've created this field, you'll be able to add it on Profile > Campus Life > Info. These fields are also available in the Campus Life > Students report filter.

To change or delete a field, click its name and make your changes in the dialog.

- You cannot change the field's input type! You can change any of the other details.
- If you delete a field, doing so will also delete any information you've collected using that field.

Step three: set up violations

Home My Profile My Courses Admin Academics <u>Campus Life</u> Communications Advising Admissions Q Search		
Students Rooms Violations Consequences Facilities Schedule <u>Settings</u>		
Fees Custom Fields Violations Consequences Campuses Buildings Resources		
Name	Automatic Fee	Add a Violation
Compulsory Violation	Compulsory Fee (\$21.00)	

Violations are things like parking tickets, dorm cleaning fees, and other non-academic infractions. You can link them to consequences and include a fee to automatically apply when you add the violation to a person.

1. Click **Add a violation**.
2. Give the violation a name.
3. If you wish, enter a description as well. This description can be edited at the time you apply the violation.
4. If you wish, select a fee. This fee will automatically apply to the student when you add the violation to their record.
5. Check to email a notification to the student when you add the violation to their account. The email will include all of the violation's details, including the description. You can un-check this at the time you apply the violation.
6. Click **Save**.

Now that you've created this violation, you can add it to students on Profile > Campus Life. As you do so, those students will list on the Violations report. Violations can also be used to trigger consequences, which you'll set up next.

Step four: set up consequences

Name	Automatic Fee	Triggers	
Discipline Committee	-	Yes	<input type="button" value="Add a Consequence"/>
Lifetime Cafeteria Ban	Campus Fee (\$50.00)	Yes	

Consequences are follow-up actions that are triggered by a certain combination of Violations. They could be things like *Meet with the Dean*, *Send a warning letter*, or *Conduct Code fine*. You can also include a fee to automatically apply when a person triggers the consequence. Consequences are initially set to *pending*; you can then *apply* them or *waive* them.

1. Click **Add a consequence**.
 2. If you wish, enter a description as well. This description can be edited at the time you apply the consequence.
 3. If you wish, select a fee. This fee will automatically apply to the student when you add the consequence to their record.
 4. Check to email a notification to the student when you add the consequence to their account. The email will include all of the consequence's details, including the description. You can un-check this at the time the consequence is set to *applied*.
 5. By default, consequences begin in the *pending* status. Check if you'd like to set the default status to *applied* immediately after this consequence is recorded against a student.
- If you manually-add this consequence, you can still change the status.
 - If the consequence is *triggered*, the status will go straight to *applied*.

- Click **Save**.

Now that you've created this consequence, you can add it to students on Profile > Campus Life.

You'll also see them on the Consequences report. If you've set up violations, you can also use violations to trigger the consequence. Here's how to set up consequence triggers:

[< Consequences](#)

Discipline Board Review

edit

Delete

Description A review of non-academic student conduct by the Discipline Board.

Fee Review Fee (\$35.00)

Triggers

add

Violation	Trigger
 Code of conduct violation	6 times in an academic term 

Consequence Triggers define how many of a certain violation in a given time period will trigger this consequence.

1. Click the consequence name to go to its page.
 2. Next to *Violations*, click **add**.
 3. Select one of the violations you set up from the drop-down.
 4. Select the unit type for the timeframe—choose from *All Time*, *Academic Year*, *Academic Term*, or *Month*.
 5. Enter the number of times the violation must be attached to a person within the timeframe to trigger the consequence.
- In the above example, if a student gets six student code violations in an academic term, he'll trigger the consequence.

- When you're done, click **Save**.
- Repeat these steps as often as you need to. If you add multiple triggers, the consequence will be added to the person if they transgress any one of them. In the below example, if a student gets six student code violations OR six parking tickets in a single academic term, the consequence will be triggered.





Triggers		add
Violation	Trigger	
 Code of conduct violation	6 times in an academic term	
 Parking ticket	6 times in an academic term	

Step six: set up resources

Home My Profile My Courses Admin Academics **Campus Life** Communications Advising Admissions
Search

Students Rooms Violations Consequences Facilities Schedule **Settings**

Fees Custom Fields Violations Consequences Campuses Buildings **Resources**

Global Resources			add	Resource Types		add
Name	Type	Delete	Name	Delete		
1999 F250 Flatbed	Vehicle		Equipment			
4-6-6-4 Challenger 3985	Train		Train			

Resources are physical items you wish to keep track of for scheduling purposes. They may be portable (projectors or vehicles, for example) or they might be tied down to a room in a building (workstations in your computer lab).

First, set up Resource Types. It's a long and arduous process, not unlike climbing one of the more moderate of the Rocky Mountains or spending a month on the Appalachian Trail, but with a diminished sense of exhilaration when the task is finally concluded:

1. Click **add** next to *Resource Types*.
2. Give the resource type a name. It should be bland and generic—*computer*, as opposed to, say, *13.3-inch MacBook Pro 2.5GHz Dual-core Intel i5*.
3. Click **Save**.

Now that you've set up some resource types, you can start adding resources to [buildings and rooms](#), as well as create global resources—those that are available for use anywhere at your school:

1. Click **add** next to *Global Resources*.
2. Give the resource a name. Get as specific as you feel you ought.
3. Select the type from the drop-down.
4. Click **Save**.

Global Resources are available for scheduling in Calendar (but not in Google Calendar at this time).

Other steps

In addition to the above tasks, you'll also want to make sure you...

- Set up [room and meal plans](#).
- Add [campuses and buildings](#).
- This was mentioned in step one—[set up the fees you want to use in Campus Life](#).

After all these pieces are in place, you'll be able to get the most out of Campus Life. The vast majority of your Campus Life activity will take place...

- On the [Profile > Campus Life](#) view.
- Among the various Campus Life reports: [Students, Rooms, Violations, and Consequences](#).

11. Advising Setup Tasks

Advising lets high-level academic users and faculty advisors keep an eye on student performance. You can read about what you can do in Advising [here](#). This article covers the setup steps that help your school get the most out of these features.

Step 1: Give users the Advisor role

The *Advisor* role gives users complete read-only access to the academic information for the students they are advising. In addition to the access they get to the Advised Students report and related views...

- They can register students for courses on the Profile > Registration screen during online enrollment periods.
- They can view contact information for their Advised students.

To give someone the Advisor role, follow the instructions [in this article](#).

Step 2: Add advisors to your students

Advising information is based on whether or not your students have Advisors in the first place! There are a few ways you can assign Advisors to your students.

Add en masse

Aggregate

Reports

Actions ▼

Export XLS

Email

Manage Tuition Schedules

Apply Charge/Credit

Apply Communication Plan

Enroll Students

Export ID Cards

Tag Results

Untag Results

Lock Results

Unlock Results

Manage Advisors

Save As New Report

C

60

5'

16

5'

2:

10

75

1224.00



Actions ▼

Manage advisors

Manage advisors for selected

Apply registration lock

Apply registration lock to selected

Remove registration lock

Remove registration lock from selected

Email students

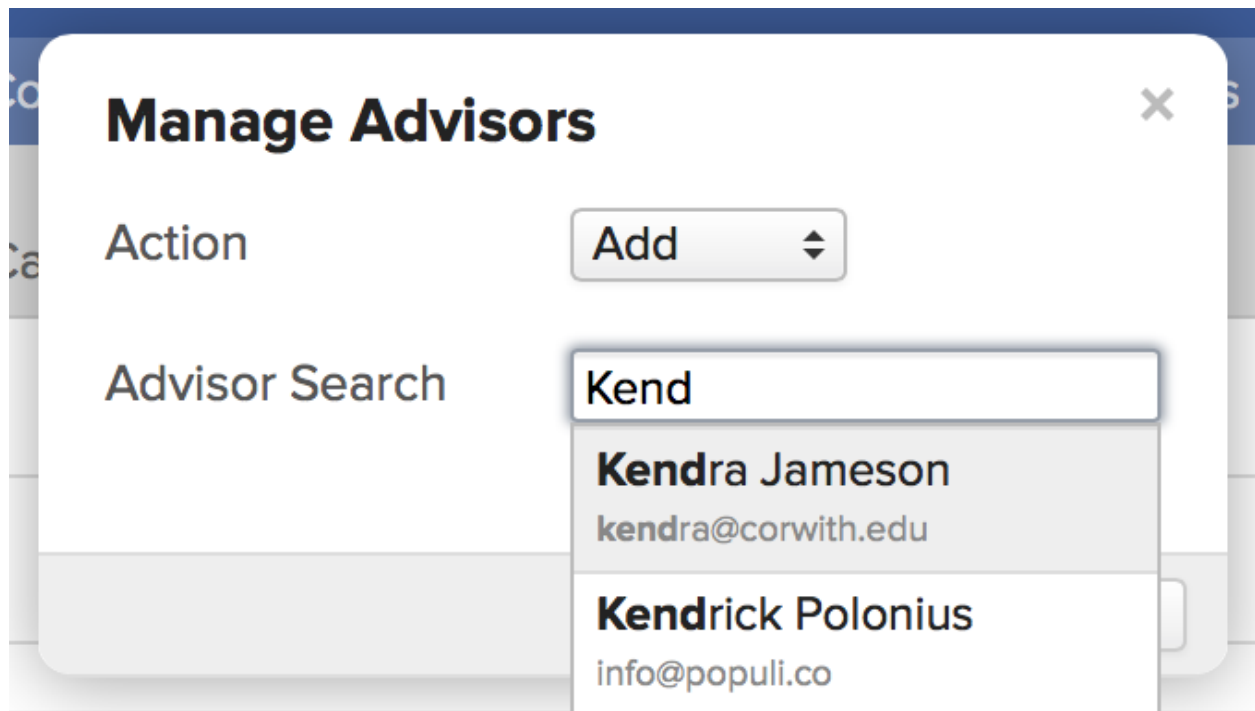
Email selected students


Export XLS

Blair G. Dornier

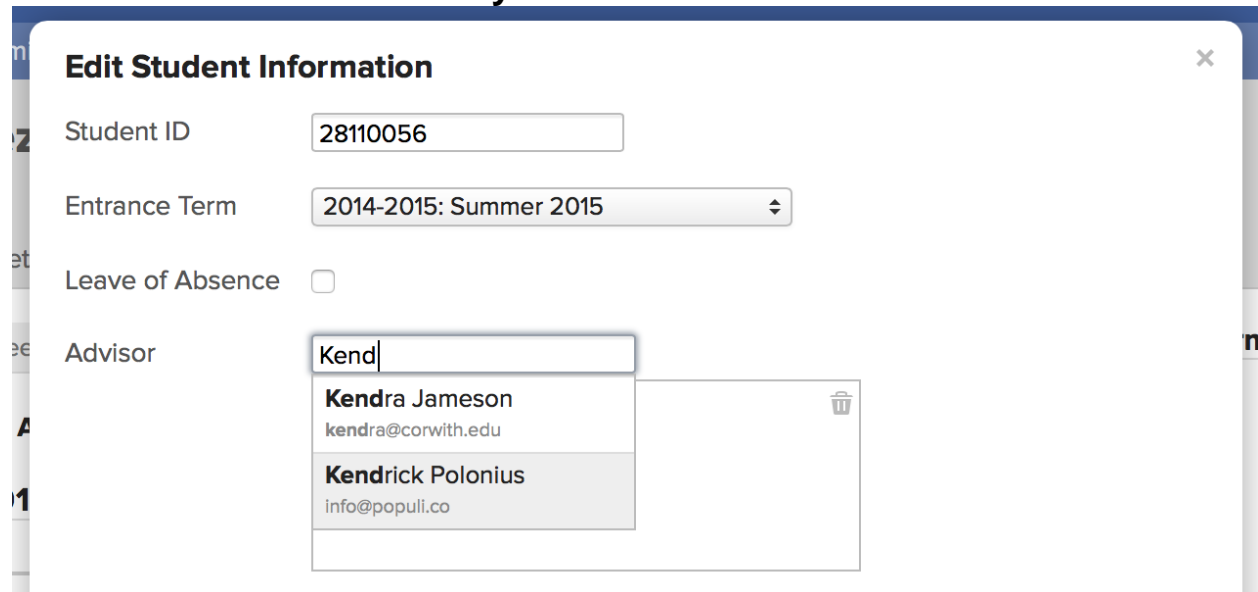
Jimmy McNulty

This option lets you add one or more Advisors to groups of students using the *Manage Advisors* action in Advising or the Data Slicer.



1. Go to either Advising > Students *OR* Academics > Reporting > Data Slicer.
 2. Filter the report:
 - [Use the filter](#) in the Advising report and check off individual students for whom you wish to change the Advisor.
 - If using the [Data Slicer](#), use the filter to run a report (or load a pre-saved report).
- Next, on either report, click **Actions** and select *Manage Advisors*.
 - For the Action, select *Add*.
 - Type the name of the Advisor you'd like to add and click the name from the suggested results.
 - Repeat step 5 to add multiple advisors. Click  to remove anyone you've added in error.
 - When you're done, click **Save**.
 - You can also **remove** Advisors in bulk; for step 4, just select *Remove* as your Action.

Add to students individually




Edit Student Information ×


Student ID

Entrance Term

Leave of Absence

Advisor **Kendra Jameson**
kendra@corwith.edu
Kendrick Polonius
info@populi.co 

This option lets you add Advisors to students one-by-one.

1. Go to the student's profile and click the Student tab.
2. In the right column, click **edit** next to Student Information.
3. Type the name of the Advisor you'd like to add and click the name from the suggested results.
4. Repeat step 3 to add multiple advisors. Click  to remove anyone you've added in error.
5. When you're done, click **Save**.




Step 2: set up flag thresholds

Academic flags provide a warning system to help you catch students who may be running into trouble. They're triggered by attendance stats and assignment grades that fall within certain ranges. You establish these ranges in Advising > Settings.

How do flags work?

Flag Thresholds

[edit](#)

Color	Attendance percent	Consecutive Absences	Average assignment grade	Lowest assignment grade
 Green	91% to 100%	1 or fewer	86 to 100	71 to 100
 Yellow	81% to 90%	2 to 3	66 to 85	61 to 70
 Red	0% to 80%	4 or more	0 to 65	0 to 60




When a student's attendance and/or grades fall within the range specified by you in Advising > Settings, he will be flagged. Flags are calculated daily based on the past 30 calendar days' worth of attendance and grades. You can also manually-add flags to students on the [student course summary page](#). Using the above image as a guide, here's how student James Smith will be flagged:

James Smith has perfect attendance (green), an average assignment grade of 82 (yellow), and a lowest assignment grade of 57% (red).

- At this point, he'll have a red flag on the Advising > Students report. The report always shows the most serious flag.
- James' [Advising](#) page will show both the yellow and red flags. The Advising page lets you see all flags, which can be *Active* or *Inactive*. Inactive flags are those that have been *resolved* or have somehow expired.
- James has a great couple of weeks in class and aces his quizzes, bringing his average assignment grade up to 93. The yellow flag expires and is replaced. The red flag nonetheless remains because of that low grade of 57%.
- James' hot streak in class continues three more weeks. His average grade is 94%, and as soon as 30 days have elapsed since that 57% grade, the red flag is replaced by green.
- If things hold steady for James, the green flag will persist until the course(s) in question (for which he received those assignment grades) are finalized.

Setting up thresholds

Flag Thresholds

Color	Attendance percent	Consecutive Absences	Average assignment grade	Lowest assignment grade
 Green	91 % to 100 %	1 or fewer	81 to 100	76 to 100
 Yellow	71 % to 90 %	2 to 3	71 to 80	51 to 75
 Red	0 % to 70 %	4 or more	0 to 70	0 to 50

or

To establish flag thresholds, you need to have the Academic Admin role.

1. Go to Advising > Settings.
2. Click **edit** next to Flag Thresholds.
3. Enter the % values for each warning category. You should likely consult your [grade and attendance](#) settings.
4. While you're free to enter whatever you please in these fields, remember that this is a *warning* system. So if a student fails for attendance at 75%, you should enter something like **0% to 80%** for the red flag under Attendance Percent. If 65% results in a course failure, then you should enter something like **0% to 70%** for the red flag under Average assignment grade. And so on.
5. The fields in gray are auto-filled based on your entries in the adjacent fields. For example, entering **75** for Yellow/Lowest assignment grade will auto-fill **76** for the minimum value for the green flag.
6. When you're done, click **Save**.

After you save, any Advisor can view (but not edit) the flag thresholds.

Notifications

Any Advisor can come here and opt-in to receive an email notification when one of her students is flagged.

1. Click **edit** next to Notifications.
2. Check which flags about which you wish to be notified.

3. When you're done, click **Save**.

Populi

1. add user, include admin, one time (IT)
2. add faculty, first time (IT), late maintenance (DOF)
3. add program, one time (IT)
4. add course catalog, one time (IT)
5. add campus, building, room (IT)
6. add term, course & Time, faculty, each trimester (Registrar's job)

set up clinic?

Q:

- 1) during student registration, it can't go back after select course.