

# CE Courses module (setup)

Last Modified on 07/30/2024 10:29 pm EDT



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The CE Course module lets you manage Continuing Education (CE) courses for associations, colleges, universities and other organizations including tracking credits or points for each course attendee.

You can classify the courses in many different ways: subject, category, instructor, location or fee type.

There also portals that students and instructors use to find information they need. [Read more about using CE Courses portals.](#)

Express Actions like [applying credits](#) in bulk and marking [CE Course Attendance](#) in bulk are also very useful.

First, set up your CE Courses module in the Setup panel.

## CE Courses – Preferences

You can switch various options on and off within the module, depending on what type of courses you're setting up. Once you enable these (or remove them) and select "Save", they'll appear (or be removed from) the module setup. Read more detail on each one below.

The **optional tabs** are:

- **Overview Tab** – once enabled, you can also choose plain text or HTML for the text formatting.
- **Classifications Tab**
- **Instructors Tab**
- **Credits Tab**
- **Course Grade Tab**
- **Course Score Tab**

**Default Certificate** – you can choose either the Certificate of Attendance or Certificate of Achievement, or another document. These documents can be found and edited in the Reporting panel (in CE Courses).

## CE Courses – Payment and Cancellation Policy

Just as with other modules, you can define **CE Course-specific** payment and cancellation policies and schedules. You can also override or adjust these for individual courses. [Read more about Payment and Cancellation policies.](#)

## Organizing your courses

Take time to plan how you'll organize your course structure. You have 3 levels of classification to work with:

- **Classification Types** – groups of classifications

- **Classifications**
- **Sub Classifications**

## Classification Types

This top-level category is for your most broad categories. Add the name of your new Classification Type, and press **Save**.

For example, you might group classifications into types based on characteristics such as level ( **basic, intermediate, advanced**).

You might choose to also add a type for to group courses by delivery method ( **online, in-person**).

Structure your courses however suits you best.

## Classifications & Sub Classifications

Enter the name of your new Classification, select your pre-defined Classification Type, and press **Save**.

(You can only choose one "type" for each Classification; each Classification **MUST** have a Type.)

Continuing our example above, let's say you created a number of Advanced Classifications, selecting "**Advanced**" Classification Type for all of them:

**Advanced Early Education**

**Advanced Aged Care**

**Advanced Project Management**

Below each of these, you might create **Sub Classifications: Semester One** and **Semester Two**, for example.

**Sub Classifications are optional.**

You could go on to create separate classifications for delivery methods – for example, selecting the "**Online**" Classification Type for all of these:

- **Asia Pacific Online**
- **USA Americas Online**
- **EMEA Online**

Once you create a course (see below) you can add multiple classifications to it, and these can include sub classifications.

Again, following the example, if you create a course called "Cognitive Development in Preschoolers", you can:

- Add the **Advanced Early Education Classification**
- Add the **Advanced Early Education – Sub Classification Semester One** (or not)
- Again add **Advanced Early Education** and then a second Sub Classification of **Semester Two** if you want to offer this course in both semesters.

Then you can ALSO add the classifications "**Asia Pacific Online**" and "**EMEA Online**".

Students searching for this course will be able to see these classifications and sub classifications.

## Create a course

You can define both internal and external CE Courses here.

### Setting up a new course (Details tab)

When creating a new course, some fields are mandatory and others are optional.

- **Unique Code** – you need to create a code of some kind to identify this course.
- **Valid Payment Status** – the default [payment statuses](#) are Purchase, Inclusive, Complimentary, and Canceled.

You can also enable additional payment statuses, such as:

- No Charge
  - Own Expense
  - Invited
  - Not Attending
  - Not Required
  - Deposit
  - Charge to Another Contact
  - Waitlist Purchase
  - Waitlist No Payment Required
- **Name** – the name of the course that students will see – this is a required field.
  - **External Course** – this is a course run by another institution. If you check this, the input fields will change, and you can no longer control the settings for Inventory, Alerts, Room Setup, Confirmation Merge Doc, etc.
  - **Inventory Limit** – you can opt for Unlimited, or Limited to a specific number.
  - **Minimum Attendance** – lets you specify the minimum attendance allowed for this course.
  - **Optional Alert** – checking this option will send an alert once the inventory level drops below the pre-set limit.
    - **Limit** – sets the percentage of remaining inventory items to trigger an alert.
    - **Alert Level** – set the alert level that you wish to send. A critical or high alert will also trigger alert indicators on the navigation bar and the event selection screen.
  - **Start and End Dates and Times** – optional but dates are needed if you want to search for this course.
  - **Date Text** – add some explanatory text here if needed.
  - **Master Course Code** – the course on which this course is based, if any. This may be an internal reference, and isn't required here.
  - **Series Code** – lets you note if this course is part of a series. This may be an internal reference, and again, isn't required.
  - **Status** – designate the current status of this course:
    - Open

- Closed
  - Tentative
  - Postponed
  - Canceled
- **Location** – select from a list of pre-defined Course Locations (see more information further below in this article).
  - **Setup Details** – any notes about how the room should be configured – seating, A/V, etc.
  - **Food & Beverage** – notes on required catering for the session.
  - **External Registration URL** – you can add the URL for your interactive registration site for this course. You can also check the box to add an Auto Login Token, allowing the registration site to be pre-populated with the student's details.
  - **External Website URL** – if you're not handling registrations for this course through EventsAir, you can add a different URL where students can register for the course.
  - **Confirmation Merge Docs** – the name of a merge document created specifically to confirm registration for a course. (With Merge Fields you can create a single Merge Doc that can handle confirmation for ALL your different courses!)
  - **Course Certificate** – choose a report layout for the certificate that will be sent to the attendee upon completion of the course.
  - **Calendar Color** – choose how this will look in the Course Calendar.
  - **Credits** – lets you specify the number of hours this course earns, and whether they are Continuing Education Units (CEU) or Credit Hours. Press **Add Credit**, select a pre-defined Credit Type from the drop-down list, and type in the number of Credits. (You define Credits in a different section – see more information below.)

## Classifications tab

Classifications are like tags you can add to a course to help categorize it.

Press **Add Classification**, then specify the Classification Type, Classification, and (optionally) Sub Classification.

## Overview tab

Enter descriptive text to be displayed on the CE Web Portal or registration site. Enter as many lines as you need; the input box will expand.

## Instructors tab

This tab allows you to create a database of instructors. You can either create a New Contact and enter the details directly, or link to an existing contact already in your database. You can see name, organization, and notes on each instructor.

## Payment Policy & Cancellation Policy tabs

If enabled in the Payment and Cancellation section of CE Course setup, these tabs will be visible.

You can choose to either use the defaults you created for all CE courses, or set custom policies just for this course.

[Read more about Payment and Cancellation policies.](#)

## Itinerary Tab

This is where you can set up the specific itinerary details for the course. This free-form text field can capture itinerary details such as transportation, location, dress codes, and more.

**Tip:** The itinerary details can be merged into **Merge Docs** for additional information that you can communicate to the attendee.

## Advanced tab

Under Advanced, you can select to record grades and/or scores for this course.

## Finding a course you already created

You may have hundreds, or even thousands of courses set up in the CE module – how can you quickly locate the ones you want?

Whenever you see "*Search to select a course*", press the **Search** button. Enter into the search box any detail about the course, to look through Course Name, Unique Code, Master Course Code, and Series Code, and return any courses that contain your search term in any of these fields.

You don't need to type in the complete code or name; just part of it will return all matching courses.

Check the boxes next to the courses you want, and click **Open**. All selected courses will now appear in the left-hand panel, for easy selection.

If you don't see the results you expect, check the Course Dates in the Search window as these are part of your search criteria.

## Course Fee Types

If you want people to pay for these courses, and to be able to offer discount codes, you must create at least one Fee Type. You'll also need Fee Types to add courses to a registration site.

## Credits

The Credits section lets you name (define) a type of credit that can be earned. You just enter a name, and press **Save**.

You don't enter the Credit Hours here; this is done when the Credit Type is applied to a Course (see above) or

Attendee (in the Attendee's contact record, under CE Credits).

Credits can also be applied in bulk, using the [Apply CE Credits](#) tool in Express Actions

## Disabling Credits

You can disable any credits that are no longer used. You wouldn't delete these as they may still be applied to previous classes, but disabling them will prevent them from being used for all courses moving forward.

## Location

This is where you pre-configure all Locations you can add when you are setting up your courses.

Just enter the name, and press **Save**.

You can (optionally) enter a comment to help describe the location better.

## Discount Codes

You can choose to nominate a Set Amount off Course Fee — a fixed amount

OR

Percentage off Course Fee — a percentage amount

You can also choose dates when the discount is available, Course Fee Types it can be applied to, and more,

[Read more about setting up discount codes.](#)

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