Generating Permission Numbers for Department Schedulers

Business Process Guide
# Action Taken

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/14/12</td>
<td>Kathleen Agostini</td>
<td>Created</td>
<td>All</td>
</tr>
<tr>
<td>5/30/12</td>
<td>Kathleen Agostini</td>
<td>Revised Student Specific Permissions section 1.2</td>
<td>Pages 14-25</td>
</tr>
<tr>
<td>8/15/12</td>
<td>Kathleen Agostini</td>
<td>Revised Permission Time Period information</td>
<td>Page 6</td>
</tr>
<tr>
<td>8/15/12</td>
<td>Kathleen Agostini</td>
<td>Added a red text box to highlight specific settings for permission numbers</td>
<td>Page 12</td>
</tr>
</tbody>
</table>
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1 Overview

Permission numbers allow students to enroll in a class that requires department or instructor consent. Additionally, permission numbers may override registration controls, such as requisites or closed classes.

There have been some enhancements to permission numbers with the 9.0 upgrade. New functionality allows you to enter comments and track distribution of permission numbers as well as new terminology that is more intuitive to the user.

On the Class Permissions page, you will see three sections to the page. The three sections are Class Section Data, Defaults, and Class Permission Data.

On the Class Section Data screen, you will see the class information. Remember to navigate to different section numbers, using your left and right arrow keys.
The Defaults section displays the default settings used when Permission Numbers are generated.

The Class Permissions Data section has three pages that allow you to track distribution of permission numbers and to enter comments. The three pages are:

1. The General Information Page, which displays the following information:
   a. Permission Number
   b. ID of the student if used
   c. Name of the student if used
   d. Issued - if selected indicates by whom and when a permission number has been given to a student. See snapshot below with an example.
   e. Issued By - populates the user ID of the person that generated the permission number and selected the Issued box
   f. Status of the permission number - Used or Not Used
   g. Permissions Use Date – the date the permission number was used to enroll the student
h. Expiration Date – system generated date which is the last day of the Add/Drop period for a term

2. The Permissions Page displays the following information/settings:

a. Permission Number

b. Student ID if used

c. *Closed Class Setting – This box will be deselected as the default setting. If deselected, the permission number will enforce the enrollment capacity on the class. If the box is selected, the permission number will override the enrollment capacity on the class.

d. *Requisites Not Met – This box will be deselected as the default setting. If deselected the permission number will enforce the requisites for the course as defined in the Catalog. If the box is selected, the permission number will override requisites for this course.

e. Consent Required – This box will be selected as the default setting. When selected, the permission number will override the Consent setting of a class. This field should remain selected as the purpose of the permission number is to allow a student to enroll in the class.

f. Career Restriction – This box will be selected as the default setting. When selected, the permission number will override the Career for a class. Selected, the permission allows a PBAC student to enroll in a UGRD course. At Cal Poly, we don’t restrict class enrollment by Career. This field should remain selected.

g. Permission Time Period – This box will be selected as the default setting, so permission numbers work throughout enrollment, including the add/drop period during the first eight days of classes.

*Of the five settings, “Closed Class” & “Requisites Not Met” are the only two settings which department schedulers may wish to manipulate. There is no need to change the default values for the other settings
Here’s a snapshot of the Permission page with the default settings:

<table>
<thead>
<tr>
<th>Seq #</th>
<th>Number</th>
<th>ID</th>
<th>Closed Class</th>
<th>Requisits Not Met</th>
<th>Consent Required</th>
<th>Career Restriction</th>
<th>Permission Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>88717</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>245826</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>791772</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>551377</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>24680</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. The Comments Page displays the following information:
   a. Permission Number
   b. Student ID if used
   c. Comment field – this is where you would enter any comments you wish to note, such as why a permission number was issued to a student.

Here’s a snapshot of the Comments page:

You may view all three pages by selecting the icon to the right of the Comments tab:
1.1 Generating Permission Numbers

Step 1: To generate or add permissions number for a class, select the menu path:

Records and Enrollment > Term Processing > Class Permissions > Class Permissions

The following screen will display.

Step 2: Enter the term code you’re generating permissions for

Step 3: Enter the subject area

Step 4: Enter the catalog number

Step 5: Select the “Search” button
Step 6
The Permission to Add page will display:

- Navigate to the class section you’re generating/adding permissions for by using the left and right arrow keys.
- Assign More Permissions – Enter the number of permission numbers you wish to generate.
- Select the “Generate” button and the permission number information will display.
- Select permission number settings/controls as appropriate. These settings are located on the Permission page.
Step 9

Select the “Save” button

You’re able to select the settings/controls for the permission numbers as appropriate on the Permission Page. The two settings used by Cal Poly are Closed Class and Requisites Not Met.

1. Closed Class - This box will be deselected as the default setting. If deselected the permission number will enforce the enrollment cap on the class. If the box is selected, the permission number will override the enrollment cap on the class.

2. Requisites Not Met – This box will be deselected as the default setting. If deselected the permission number will enforce the requisites for the course as defined in the Catalog. If the box is selected, the permission number will override requisites for this course.
Step 10
To issue a permission number for a closed class while still enforcing the requisites for the course, select the Closed Class box and leave the Requisites Not Met box deselected.
Step 11: To issue a permission number that will override the requisites for a course but still enforce the enrollment capacity on the class, select the Requisites Not Met box and leave the Closed Class box deselected.
To override a closed class and requisites on a course, select the Closed Class box and the Requisites Not Met box.
1.2 Student Specific Permission Numbers

Student Specific Permissions are used when the student enrollment for a class is known, such as a cohort of classes and the same students are progressing together through a series of classes.

The set-up for coding a class to be Student Specific Permission has not changed from 8.9 to 9.0. However, there have been some enhancements to permission numbers with the 9.0 upgrade. New functionality allows you to enter comments and track distribution of permission numbers as well as new terminology that is more intuitive to the user.

<table>
<thead>
<tr>
<th>Step 1</th>
<th>To set-up Student Specific Permission for a class, follow these steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Navigate to Curriculum management &gt; Schedule of Classes &gt; Maintain Schedule of Classes</td>
</tr>
</tbody>
</table>

**Maintain Schedule of Classes**

Enter any information you have and click Search. Leave fields blank for a list of all values.

<table>
<thead>
<tr>
<th>Find an Existing Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit the number of results to (up to 300):</td>
</tr>
<tr>
<td>Academic Institution:</td>
</tr>
<tr>
<td>Term:</td>
</tr>
<tr>
<td>Subject Area:</td>
</tr>
<tr>
<td>Catalog Nbr:</td>
</tr>
<tr>
<td>Academic Career:</td>
</tr>
<tr>
<td>Campus:</td>
</tr>
<tr>
<td>Description:</td>
</tr>
<tr>
<td>Course ID:</td>
</tr>
<tr>
<td>Course Offering Nbr:</td>
</tr>
<tr>
<td>Case Sensitive</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Enter the term code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 3</td>
<td>Enter the Subject Area</td>
</tr>
<tr>
<td>Step 4</td>
<td>Enter the catalog Nbr</td>
</tr>
<tr>
<td>Step 5</td>
<td>Select the “Search” button</td>
</tr>
</tbody>
</table>
Step 6

On the Basic Data page you will select Student Specific Permissions

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### Basic Data

**Course ID:** 001705
**Academic Institution:** Cal Poly
**Term:** Spring Quarter 2012
**Subject Area:** ARCH
**Catalog Nbr:** 470

**Course Offering Nbr:** 5604
**Academic Organization:** 135-ARCH
**Academic Group:** UGRD
**Holiday Schedule:** AHS

**Class Sections**

- **Session:** Regular Academic Session
- **Class Section:** 01
- **Component:** LEC
- **Class Type:** Enrollment
- **Units:** 4.00
- **Location:** SLO
- **Campus:** Main CPSLO
- **Course Administrator:** Main CPSSLO
- **Class Topic:** Architecture Publications

**Equivalent Course Group**

**Course Equivalent Course Group:**

**Class Attributes**

- **Course Attribute:** CLEV
  - **Value:** Course Level
  - **Value:** Upper Division
- **Course Attribute:** EDT1
  - **Value:** State Support

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**Schedule Print**

- **Student Specific Permissions**

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**Add Fee**
Step 7  
On the Enrollment Cntrl page you will select Dept Cnsnt (Department Consent) for the Add Consent field value.

Step 8  
You will then need to go into the Class Permissions page and enter the student ID’s of the students you intend to give permission to enroll in this class section.

Select the menu path: Records and Enrollment > Term Processing > Class Permissions > Class Permissions

The following screen will display:
<table>
<thead>
<tr>
<th>Step</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 9</td>
<td>Enter the term code</td>
</tr>
<tr>
<td>Step 10</td>
<td>Enter the subject area</td>
</tr>
<tr>
<td>Step 11</td>
<td>Enter the catalog Number and select the “Search” button</td>
</tr>
</tbody>
</table>
Step 12

The Permission to Add screen will display:

NOTE: To navigate to different section numbers of the same course, use your left and right arrow buttons.
In the ‘Defaults’ area, you’ll see the global controls that will be applied to the permission numbers for the class section specified. Determine if you wish to override ‘Closed Class’ and ‘Requisites Not Met’. The default settings already are selected to override ‘Consent Required’, ‘Career Restrictions’, and ‘Permission Time Period’ as these boxes have been pre-selected.

*If you want the enrollment cap and the prerequisites enforced, then you will leave the ‘Closed Class’ and ‘Requisites Not Met’ boxes deselected and proceed in entering the student ID’s.*

*If you wish to override the ‘Closed Class’ and ‘Requisites Not Met’, then you will select the boxes in*
the ‘Defaults’ area.
Step 14

In the Class Permissions Data you will find the field titled “ID”. This is where you will enter the student ID’s you wish to issue permission to enroll in this class.

When you tab out of the ID field the name of the student will populate in the “Name” field.
Step 15
Once you’ve entered the first student ID, hit the ‘plus’ + button to add additional names and ID’s as necessary.
Step 16

You may also use the “Look up” function to add the students on this page. Select the magnifying class to the right of the ID field and the following is a screen shot of the searchable fields you may use to locate the students you wish to give permission to enroll in this class.

![Look Up ID](image)

**Look Up ID**

- **ID:**
- **Campus ID:**
- **Local Campus ID:**
- **National ID:**
- **Last Name:**
- **First Name:**

[Look Up] [Clear] [Cancel] [Basic Lookup]

*Searching this table may take a long time. Enter values above before requesting Lookup.*
To review the settings or change the settings once you entered a student’s name, go to the Permission tab under Class Permission Data. Once the student has successfully enrolled, these setting will become ‘locked’ and won’t be able to be changed.
On the Comments page, you can enter information specific to the student if desired.
Step 19

Remember to hit the Save button when you’ve finished entering the students ID’s.