Student Administration
Upgrade to 9.0

Spring 2012
Today’s Agenda

- Welcome and Introductions
- Timing of Upgrade
- Navigation Changes
- Service Indicators
- Advisor Center
- Schedule of Classes
- Permission Numbers
- PASS/CPReg demos
- Training Guides
- General Updates
- Summary
Timing of Upgrade

- May 17th at 5 p.m. Student & HR Administration comes down
- This includes services such as Employee and Student Self Service, Registration, Admissions, Degree Progress Report, Financial Aid, Student Finance, Student Center, and Human Resources.
- During the upgrade, the PeopleSoft HCM system will be unavailable and we expect it to be back up no later than May 23 at 8:00 am.
Navigation Changes

- There are two options with navigation
  1. Left Hand Navigation
  2. Floating Drop Down Navigation
Navigation Changes

- Left-hand menus can be expanded/minimized
Navigation Changes

- Remember bread crumbs?
Navigation Changes

1. Left-Hand Navigation
2. Floating Drop Down Navigation
Navigation Changes

- Processing and Saved icons will appear in the upper right portion of the page

- **Processing**

- **Saved**
Navigation Changes

- Favorites
  - Warning – because some pages have changed locations and are grouped differently according to the menu structure, some of your favorites may no longer work. You simply have to manually navigate to them again, and add as a favorite again and delete your old favorite.

- Recently Used
  - New feature
Service Indicators

- Basis of Impact determines whether the Service Indicator should end based on a date or a term or both.
  
  - If term is selected, the Service Indicator no longer has an impact as of the end of the term. We will continue our current process, which is to not enter an end term.

  - If date is selected, the Service Indicator no longer has an impact as of the end date. Cal Poly currently used term based service indicators for enrollment processing.
Advisor Center

- New feature that replaces New Drop-In Advisee
Advisor Center

- After you search for a student you are brought to the student center view for that student

- Holds
- Current class schedule
- Contact information
- Run the student’s DPR
## Advisor Center

### Class Schedule

#### Spring Quarter 2012 | Undergraduate | Cal Poly

### KINE 255 - Persni Hth / Multictri Aprch

<table>
<thead>
<tr>
<th>Status</th>
<th>Units</th>
<th>Grading</th>
<th>Requirement Designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled</td>
<td>4.00</td>
<td>Graded</td>
<td>General Education 04 and USC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Class Nbr</th>
<th>Section</th>
<th>Component</th>
<th>Days &amp; Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Start/End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>5133</td>
<td>01</td>
<td>Lecture</td>
<td>TuTh 2:10PM - 4:00PM</td>
<td>Performing Arts Center 124</td>
<td>David Hey</td>
<td>03/26/2012 - 06/01/2012</td>
</tr>
</tbody>
</table>

### MATH 241 - Calculus IV

<table>
<thead>
<tr>
<th>Status</th>
<th>Units</th>
<th>Grading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled</td>
<td>4.00</td>
<td>Graded</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Class Nbr</th>
<th>Section</th>
<th>Component</th>
<th>Days &amp; Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Start/End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>3396</td>
<td>04</td>
<td>Lecture</td>
<td>MWFTh 10:10AM - 11:00AM</td>
<td>Math &amp; Science 0228</td>
<td>Todor Todorov</td>
<td>03/26/2012 - 06/01/2012</td>
</tr>
</tbody>
</table>

### MATH 244 - Linear Analysis I

<table>
<thead>
<tr>
<th>Status</th>
<th>Units</th>
<th>Grading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled</td>
<td>4.00</td>
<td>Graded</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Class Nbr</th>
<th>Section</th>
<th>Component</th>
<th>Days &amp; Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Start/End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>3602</td>
<td>01</td>
<td>Lecture</td>
<td>MWFTh 1:10PM - 2:00PM</td>
<td>Math &amp; Science 0228</td>
<td>James Robertson</td>
<td>03/26/2012 - 06/01/2012</td>
</tr>
</tbody>
</table>
Advisor Center

- **Degree Progress Report (DPR)**

- **Open Forum on changes to DPR**
  - 5/11 10-11 a.m. UU 220
  - 5/16 1-2 p.m. Dexter 34-227
  - 5/24 11-12 p.m. 38-204
The general info tab is the student’s bio/demo data.
**Advisor Center**

- The external credit tab shows transfer, test & other credit
Expand the Details of External Units to see the detail
Advisor Center

- Academic page has 3 sections:
### Spring Quarter 2012

- **Eligible to Enroll:** Yes
- **Primary Program:** UGRAD - Undergraduate
- **Academic Standing Status:** Data unavailable

#### Level / Load
- **Academic Level - Projected:** Junior
- **Academic Level - Term Start:** Junior
- **Academic Level - Term End:** Junior
- **Approved Academic Load:** Full-Time
- **Academic Load:** Enrolled Full-Time

#### Classes

<table>
<thead>
<tr>
<th>Class</th>
<th>Description</th>
<th>Units</th>
<th>Grading</th>
<th>Grade</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHEM 129-31</td>
<td>General Chemistry III (Lecture)</td>
<td>4.00</td>
<td>Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 129-02</td>
<td>General Chemistry III (Laboratory)</td>
<td></td>
<td>Non-Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KINE 255-01</td>
<td>Physical Fitness (Lecture)</td>
<td>4.00</td>
<td>Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MATH 241-04</td>
<td>Calculus IV (Lecture)</td>
<td>4.00</td>
<td>Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MATH 244-01</td>
<td>Linear Algebra I (Lecture)</td>
<td>4.00</td>
<td>Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME 211-07</td>
<td>Engineering Statics (Lecture)</td>
<td>3.00</td>
<td>Graded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCM 101-01</td>
<td>Introduction To The Health Prof (Lecture)</td>
<td>1.00</td>
<td>Credit / No Credit</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Statistics

<table>
<thead>
<tr>
<th>Spring Quarter 2012</th>
<th>From Enrollment</th>
<th>Combined Term Total</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units Toward GPA:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken</td>
<td></td>
<td></td>
<td>62.000</td>
</tr>
<tr>
<td>Passed</td>
<td></td>
<td></td>
<td>62.000</td>
</tr>
<tr>
<td>In Progress</td>
<td>15.000</td>
<td>15.000</td>
<td>22.000</td>
</tr>
<tr>
<td>Units Not for GPA:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taken</td>
<td></td>
<td></td>
<td>3.000</td>
</tr>
<tr>
<td>Passed</td>
<td></td>
<td></td>
<td>3.000</td>
</tr>
<tr>
<td>In Progress</td>
<td>1.000</td>
<td>1.000</td>
<td>1.000</td>
</tr>
<tr>
<td>Transfer Units</td>
<td></td>
<td></td>
<td>45.000</td>
</tr>
</tbody>
</table>

**GPA Calculation**

<table>
<thead>
<tr>
<th>Total Grade Points</th>
<th>210.000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units Taken Toward GPA</td>
<td>62.000</td>
</tr>
<tr>
<td>GPA</td>
<td>3.387</td>
</tr>
</tbody>
</table>
Schedule of Classes

- Unit Value Display
  - Field is informational only and cannot be modified by user
  - Displays course unit value, whether fixed or variable
Schedule of Classes

- Course unit value - Fixed
Schedule of Classes

- Course unit value - Variable
Schedule of Classes

- **Course unit value**
  - Course with multiple components, e.g. lecture/lab
Schedule of Classes

- Consent to Drop - this new functionality will not be used
  - Default value will be “No Consent”
  - Academic Schedulers should not modify the value
  - University Scheduling will run a query each term to verify the default setting is intact
Permissions

- Student Specific Permissions – no changes to set-up or use
- Permission Numbers – improvements and enhanced functionality
  - Permission number terminology is more intuitive
  - Ability to enter comments and track distribution of permission numbers
  - System-generated permission numbers won’t override settings on permission numbers previously generated by individual departments
Permission Numbers

- General Info page for viewing permission number usage
  - Issued* – If selected, indicates by whom and when a permission number has been given to a student
    - Issued By* – User who generated permission number
    - Issued Date* – Date permission number was generated
  - Status – Used or Not Used
  - Permission Use Date – Date permission number used by student for enrollment
  - Expiration Date

* New, optional fields
Permission Numbers

- General Info page for converted permission numbers
Permission Numbers

- General Info page for new permission numbers generated in HCM 9.0
Permission Numbers

- Comments page for entering notes about an individual permission number
Permission Numbers

- Permission number settings
  - Permission number settings will be converted for all previous terms as well as for the Summer 2012 and Fall 2012 terms
  - In HCM 9.0, there are five different settings
    1. Closed Class*
    2. Requisites Not Met*
    3. Consent Required
    4. Career Restriction
    5. Permission Time Period

*Setting used by Cal Poly
# Permission Numbers

## Values used by Cal Poly:

<table>
<thead>
<tr>
<th>PS 8.9 Setting</th>
<th>Control</th>
<th>HCM 9.0 Setting</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t Override Class Limit</td>
<td>Deselected □</td>
<td>Closed Class</td>
<td>Selected ✓</td>
</tr>
<tr>
<td></td>
<td>Allows a student to enroll in a class that is full or closed.</td>
<td>Allows students to enroll in a class that is full or closed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Selected ✓</td>
<td></td>
<td>Deselected □</td>
</tr>
<tr>
<td></td>
<td>Does not allow a student to enroll in a class that is full or closed.</td>
<td>Does not allow a student to enroll in a class that is full or closed.</td>
<td></td>
</tr>
<tr>
<td>Don’t Override Requisites</td>
<td>Selected ✓</td>
<td>Requisites Not Met</td>
<td>Deselected □</td>
</tr>
<tr>
<td></td>
<td>Enforces requisites - does not allow a student to override requisites.</td>
<td>Enforces requisites – does not allow a student to override requisites.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Deselected □</td>
<td></td>
<td>Selected ✓</td>
</tr>
<tr>
<td></td>
<td>Allows a student to override requisites.</td>
<td>Allows a student to override requisites.</td>
<td></td>
</tr>
</tbody>
</table>
### Permission Numbers

- **Other values, which are not used by Cal Poly:**

<table>
<thead>
<tr>
<th>PS 8.9 Setting</th>
<th>Control</th>
<th>HCM 9.0 Setting</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>Consent Required</td>
<td>Selected (Default) ✓ Allows a student to enroll in a class, regardless of consent value (N, D or I).</td>
</tr>
<tr>
<td>Don’t Override Career</td>
<td>Deselected □ Allows a student to enroll in a class outside of their career, e.g. a PBAC student can enroll in a UGRD class.</td>
<td>Career Restrictions</td>
<td>Selected (Default) ✓ Allows a student to enroll in a class outside of their career, e.g. a PBAC student can enroll in a UGRD class.</td>
</tr>
<tr>
<td>N/A</td>
<td>N/A</td>
<td>Permission Time Period</td>
<td>Selected (Default) ✓ At Cal Poly, enrollment security and system dates determine when permission numbers are required (add/drop period), so this setting has a null effect.</td>
</tr>
</tbody>
</table>
Permission Numbers

- Permission page for converted permission numbers

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**Permission to Add**

- Course ID: 001180
- Academic Institution: Cal Poly
- Term: Spring Quarter 2012
- Subject Area: AERO
- Catalog Nbr: 310
- Course Offering Nbr: 1
- Undergrad: Aerospace Engineering
- Air and Space

**Class Section Data**

- Session: 1
- Regular Academic Session
- Class Nbr: 1003
- Class Status: Active
- Class Type: Enrollment Section
- Instructor: Leaphart, Edward IV

**Defaults**

- Expiration Date: 04/05/2012
- Permission Valid For:
  - Closed Class
  - Requisites Not Met
  - Consent Required
  - Career Restriction
  - Permission Time Period

**Assign More Permissions:**

- Generate
- Set All Permissions to Issued

---

**Class Permission Data**

- Sequence #: 1
- Number: 959501
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes

- Sequence #: 2
- Number: 201361
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes

- Sequence #: 3
- Number: 157383
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes

- Sequence #: 4
- Number: 356022
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes

- Sequence #: 5
- Number: 572203
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes

- Sequence #: 6
- Number: 829126
- ID: [Image]
- Closed Class: Yes
- Requisites Not Met: Yes
- Consent Required: Yes
- Career Restriction: Yes
- Permission Time Period: Yes
Permission Numbers

- How to generate permission numbers
  - Assign More Permissions – Enter number of permission numbers to be generated
  - Select “Generate”
  - Select permission number settings as appropriate
  - Save
- Examples:
  - ✓ Class is closed – no seats available. How do you generate a permission number to allow student in a closed class, but not override requisites?
  - ✓ Instructor has given permission to a student to enroll in class for which they don’t meet all of the requisites. How do you generate a permission number to allow student to enroll, but not exceed enrollment capacity?
Permission Numbers

- Business Process Change
  - Permission numbers will now be available on the portal a day earlier for instructors
  - Examples
    - Summer 2012: Classes start Monday, June 18; permission numbers available on Friday, June 15
    - Fall 2012: Classes start Tuesday, September 18; permission numbers available on Friday, September 14
  - Departments that modify default settings will be able to make those modifications a day earlier.
PASS/CPReg Demos

- Will be available when we come up live in 9.0

**Registration & Enrollment**

**Enrollment Planning**

- **Academic Catalog**
  View degree programs, course descriptions, and academic requirements.

- **Class Search**
  Search for classes by subject area, course, session, day, time or GE area.

  **NOTE:** until a Schedule of Classes is available on PASS, future quarter developed and should not be used for your planning purposes.

- **Plan A Student Schedule (PASS)**
  Use Plan a Student Schedule (PASS) to plan your schedule each quarter. As a student, you will be able to plan your schedule and save the schedules you wish to use when registering.

- **Advanced Placement Credit**
  Choose this link to research Advanced Placement Credit for Exams.

- **Change Your Major**
  Interested in changing your major? Find out more.

- **PASS Demo**
  Watch this quick overview to learn how to use the Plan A Student Schedule (PASS).

- **CPReg Demo**
  View a 4 minute demonstration of enrollment.
Training Guides

- On Registration and Enrollment tab in portal
  - Will be available when we come up live in 9.0
General Updates

- Compatibility issues with IE 9
- Office of the Registrar – Window Hours
  M-F 8-5 p.m.
- Office of the Registrar – Website domain will change 5/2
Summary

- Dates of Upgrade
- New Navigation
- New Advisor Center
- Schedule of Classes Changes
- Permission Number Changes
- Updated PASS/CPReg demos
- Updated Training Guides on portal
- Updates from Office of the Registrar
Questions

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