Planning Phase Checklist

Please read through this checklist before beginning your data entry.

Curriculum Management > Maintain Schedule of Classes > Basic Data (tab)

To add a new section, use the blue plus symbol.

To delete a section, use the blue minus symbol.

☐ Session – Default is ‘1’ for the Regular Academic Session.

☐ Class Section – Must be **two digits**.

☐ Component – All necessary components of a course (lecture/lab combinations, for example) must be scheduled for the correct number of contact hours.

☐ Class Type – Enrollment or non-enrollment. For single-component courses, class type will be Enrollment for all sections. For multi-component courses, i.e. lecture/lab courses, you’ll need to specify Enrollment or Non-Enroll for each section, dependent on the component.

☐ Associated Class – Must reflect corresponding lecture/lab relationships.

☐ Schedule Print – If the box is checked, the class will be viewable on PASS and CPReg. Please note that for multiple component courses, all related pieces MUST be scheduled to print. To regulate enrollment, please use Department Consent, Enrollment Capacity Manipulation or request a Reserve Capacity be placed on the course. Contact University Scheduling if in doubt.

☐ Student Specific Permissions – Student Specific Permissions box should be checked if you will be entering Student EMPLID in lieu of creating permission numbers. This type of permission requires Department or Instructor Consent also be selected on the Enrollment Control tab.

☐ Course Topic ID – Enter the correct topic ID on the BASIC DATA page. Note: Courses will not be allowed to print to PASS until the correct Topic is assigned.

Curriculum Management > Maintain Schedule of Classes > Meetings (tab)

If **changing meeting pattern days or times**, you may type over the existing information.

If **changing instructor**, delete row using blue minus symbol, **SAVE**, then enter new Instructor ID.

*Important* If **deleting instructor only**, use the blue minus symbol, then **SAVE**. This removes relationships that exist within Workload and HR tables.

If **more than one instructor**, go to Workload tab and adjust Load Factor to total 100 for class.

☐ Class APDB Mapping Values – Learning Mode is entered here. The list of Learning Modes can be found at [http://registrar.calpoly.edu/universitalscheduling/classes](http://registrar.calpoly.edu/universitalscheduling/classes)

☐ Facility ID – ONLY enter rooms that belong to your department. Room preferences should be included in your ‘Special Instructions’ sent after completing your data entry.

☐ Pattern – Enter “TBA” for TBA meeting pattern, optional to enter days of week pattern (i.e., MW, TR, MTRF). Must also specify the number of TBA hours, calculated by multiplying the number of units by the component type meeting time requirements, in the Meeting APDB Mapping Values area.

☐ Meeting Start

☐ Meeting End

☐ Days of Week Check Boxes – Please make sure days of week checkboxes correspond with PAT field.

☐ Meeting APDB Mapping Values – Specify number of TBA hours only.

☐ Instructor Empl ID – To change or remove instructor, use the minus (-) symbol, **SAVE**, then enter new instructor EMPL ID.

☐ Access = ‘Approve’ to ensure instructors will have access to PolyLearn, class rosters and grade rosters.
Room Characteristic – Specify request for multimedia room, PC lab (with or without GIS/CAD Software), Mac lab, or distance learning technology. **Smart room requests no longer need to be identified in Maintain Schedule of Classes. All university lecture spaces have been equipped with smart room equipment.** When more than one kind of room is needed, submit that information in your Special Scheduling Instructions when data entry is complete. With the limited availability of these special rooms, specifying them during the Planning Phase is critical.

Please note that PeopleSoft now displays the Associated Class value and total course Units on the Meetings tab for easier reference. Verify section relationships and variable/fixed unit attributes without going to another page. Remember that this is the Total Units for the entire course, not the individual component units.

Curriculum Management > Maintain Schedule of Classes > **Enrollment Control (tab)**

- Add Consent – specify ‘No Consent’ or ‘Dept Consent’ (‘No Consent’ will flip to ‘Instructor Consent’ at the end of Open Enrollment before the first day of classes, when permission numbers are required to enroll in any section. ‘Dept Consent’ will remain in place throughout the registration process and permission numbers will not push to the instructor’s portal.)
- Requested Room Capacity – Capacity of the room needed, used for room assignments. (Please be as realistic as possible to ensure you are placed in an adequate room during Planning, as opposed to requesting moves, which may not be possible, later in the process.)
- Enrollment Capacity – This is the maximum enrollment for the class. (This should NOT be larger than room capacity.)
- Wait List Capacity – Enter a value of ‘99’ to allow students to wait list for the class.

Curriculum Management > Maintain Schedule of Classes > **Reserve Cap (tab)**

**This page is updated by University Scheduling only.**

- Review reserve capacity settings, which have rolled from the previous like term.
- If reserve capacity needs to be added, removed, or changed for any sections, please note in Special Scheduling Instructions in the email you send to University Scheduling for planning phase.

Curriculum Management > Maintain Schedule of Classes > **Notes (tab)**

To **add a note**, use the blue plus symbol.

To **delete a note**, use the blue minus symbol.

- Evaluate notes currently tied to the course which may have rolled from the previous like term to ensure accuracy and relevancy for the new term.
- Note Nbr – Specify a note that exists in the Class Notes table. (View the complete list of available notes at Curriculum Management > Schedule of Classes > Class Notes Table.)
- Free Format Text – Specify a **section-specific** note not already in the Class Notes table.

Curriculum Management > Adjust Class Associations > **Unit Values (tab)**

Unit value – Classes rolled with catalog unit values, not what was offered in the previous like term. If a variable unit course was fixed at a specific value, it has been returned to its variable range. You will need to communicate your request to University Scheduling via email with your Special Scheduling Instructions upon completing data entry.
Curriculum Management > Adjust Class Associations > **Components (tab)**

Contact Hours – Verify you have scheduled the correct number of contact hours for each component of your course.

Curriculum Management > Adjust Class Associations > **Requisites (tab)**

Enrollment controls can be reviewed under Adjust Class Associations. Changes to prerequisites require a course modification to the catalog. Please contact us if you have questions.

**How Can I Review My Class Schedule Before the Deadline?**

You may review your data entry at any time using PeopleSoft or PolyData Dashboards. Much of the Schedule of Classes Report information can be found in PolyData Dashboards under **Enrollment Management > Enrollment & Schedule Planning > Schedule of Classes**, in a format similar to the spreadsheets we send for the proofing and reporting phases. Remember that Data Warehouse information is updated only once daily, so changes will not be reflected until the next day.

**Special Scheduling Instructions**

Email University Scheduling (classschedule@calpoly.edu) when data entry is complete:

- Reserve Capacity (i.e. CBF classes, priority for your majors)
  * All reserve capacities will lift on the first day of open enrollment
- Combined Sections and/or Cross Listed Classes – Include course, section, class number, meeting pattern and total enrollment for all combined sections.
- Room conflicts scheduled intentionally - i.e. shared lab space for multiple sections.
- Special room requests not requested via Room Characteristics –
  - Instructor health issue
  - More than one special room request per section (Only one Room Characteristic can be specified for each section in PeopleSoft, but we can manually assign rooms to classes with multiple needs.)
- Variable unit courses that you intend to offer at a fixed unit value – Classes roll with catalog unit values, not what was offered in the previous like term. Review unit values for variable unit classes using the Class Associations page in PeopleSoft.
- Identify distance learning classes, fully online classes, or hybrid classes (a portion taught in the online format and a portion taught in person), so learning mode can be specified and appropriate room assignment can be made, if required.

**Where Can I Find Additional Scheduling Resources?**

Resources available online at [http://registrar.calpoly.edu/universityscheduling/classes](http://registrar.calpoly.edu/universityscheduling/classes) include:

- Production Calendar
- Approved Scheduling Time Patterns
- University Scheduling Controlled Lecture Rooms
- Special Final Exam information

**REMEMBER** to notify University Scheduling by emailing classschedule@calpoly.edu when you have completed your data entry for the planning phase.