Academic Scheduling User Guide

Scheduling Resources & Overview of PeopleSoft fields required for entering and proofing academic schedules

University Scheduling
Cal Poly State University, San Luis Obispo
8/2/2016

Table of Contents

Academic Scheduling Resources 3
Submitting Changes to Class Scheduling 5
Cancelling or Changing a Class 5
Adding a Class 5
Requesting Room Changes 6
Sample Planning Phase Checklist 7
Sample Proofing Phase Checklist 10
Sample Reporting Phase Email 12
Sample Reporting Worksheet 13
PeopleSoft Data Entry Guide - Overview 14
Schedule New Course 14
Maintain Schedule of Classes 14
Adjust Class Associations 14
Update Sections of a Class 15
Catalog 15
PeopleSoft Data Entry Guide 16
Schedule New Course | Basic Data 16
Maintain Schedule of Classes | Basic Data 16
Maintain Schedule of Classes | Meetings 18
Maintain Schedule of Classes | Enrollment Control 20
Maintain Schedule of Classes | Reserve Capacity 22
Maintain Schedule of Classes | Notes 23
Adjust Class Associations | Class Associations 24
Adjust Class Associations | Class Components 25
Adjust Class Associations | Class Requisites 26
Update Sections of a Class | Class Status 27
Update Sections of a Class | Class Enrollment Limits 28
Catalog | Catalog Data 29
Catalog | Offerings 31
Catalog | Components 32

Academic Scheduling Resources

University Scheduling Website - http://registrar.calpoly.edu/universityscheduling/index

For Department Academic Schedulers - http://registrar.calpoly.edu/universityscheduling/classes

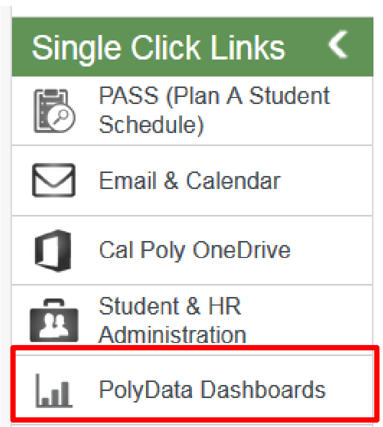
- Production Calendar
- Special Final Exam Information
- Curriculum Handbook
- Permission numbers
- Lecture rooms by building and capacity
- CS Number & K-Factor
- Approved Time Patterns
- CAP & FAD calendar
- CSU Learning Modes

Production deadlines available in Outlook calendar

Important scheduling dates are viewable in your Outlook calendar by creating a link with Class Schedule's calendar. Follow these instructions to create the link:

1. Open your Outlook calendar.
2. Go to Calendar button at bottom of the screen (will route you to Calendar Home Page)
3. In the Calendar 'Home" Tab select " Open Calendar" (a drop down menu will appear)
4. Select "From Address Book" then type or select "classschedule@calpoly.edu. "
   - You will **not** receive pop-up notifications for these events, but they will appear in your Outlook calendar.

PolyData Dashboards (Data Warehouse)



Information on the Dashboard is extracted from the data warehouse, which reflects the previous day's information.

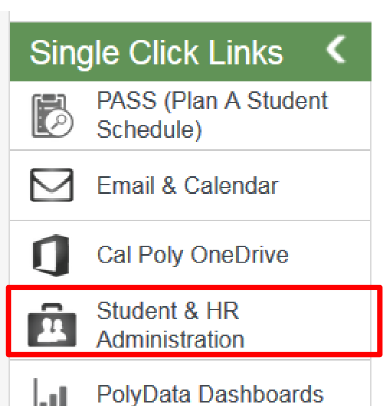
Enrollment and Scheduling Planning >

- 50% outside "Prime Time": **Class Time Spread**
- Class schedules: **Schedule of Classes**
- Historical course offerings: **Schedule Planning**

Course Demand >

- PolyPlanner Course Demand data

PeopleSoft Student Administration for Scheduling Info & Permission Numbers



Curriculum Management >

- Current course information:
  Course Catalog > **Course Catalog**
- View specific section information:
  Schedule of Classes > **Maintain Schedule of Classes**
- At a glance you can review the associations and enrollment:
  Schedule of Classes > **Update Sections of a Class**
- Overview of components, unit values and prerequisites:
  Schedule of Classes > **Adjust Class Associations**
- View a schedule by term and department
  Schedule of Classes > **Class Search**

Records and Enrollment >

- Permission Numbers
  Term Processing > Class Permissions > **Class Permissions**

TestPASS

Available during the proofing phase, this tool allows you to view the schedule of classes as students will see it on PASS.

- TestPASS updates every 5 minutes for enrollment items only
- Schedule changes, such as instructor name, room change, etc…, update daily at 6am, 12pm & 6pm

PASS: Plan A Student Schedule

Students view the schedule of classes, build their schedules prior to and during registration.

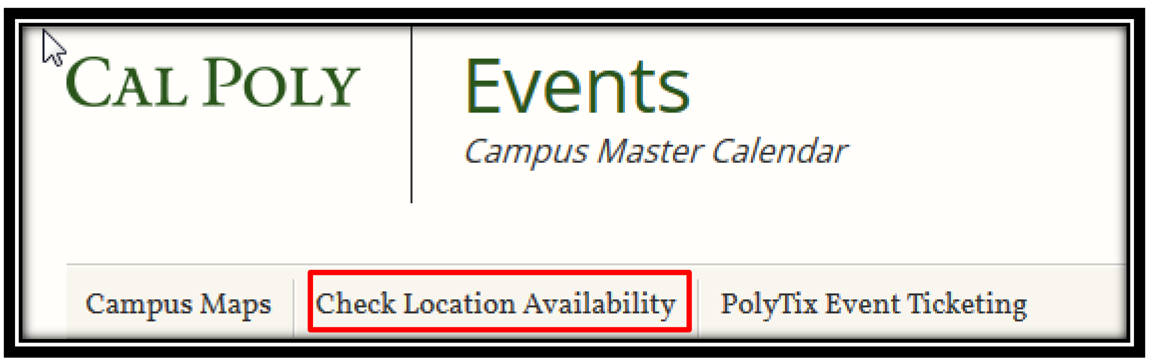
- PASS updates every 5 minutes for enrollment items only
- Schedule changes, such as instructor name, room change, etc…update daily at 6am, 12pm & 6pm

REGISTRATION

Students access the registration system through their portal. It is not the same as PASS, though information may be pushed directly from PASS to the student's "shopping cart".

Events Web Viewer

Find an open room before rescheduling a class or contacting University Sscheduling. http://events.calpoly.edu

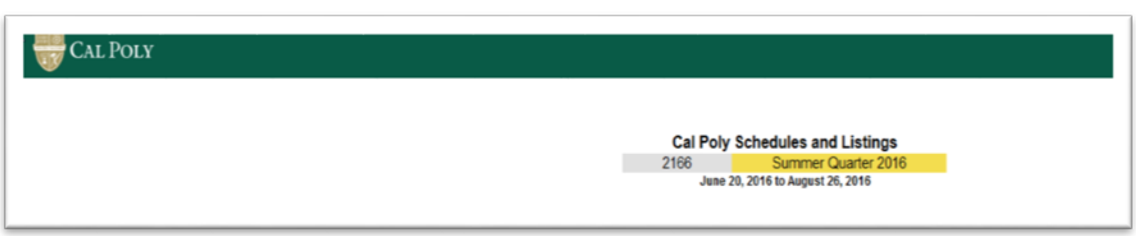


Check Location Availability instructions can be found at: http://registrar.calpoly.edu/universityscheduling/events (under How to Schedule an Event)

College of Science and Math Website

Supported by the College of Science and Math

- Verify instructor schedules and room assignments and find time conflicts for both.
- http://schedules.calpoly.edu/



Submitting Changes to Class Scheduling

All changes must be received via email. NO changes will be completed over the phone.

Email all changes to classschedule@calpoly.edu.

Cancelling or Changing a Class

When sending a request to cancel or change a class, please provide the Subject, Course, Section and Class number – for example, ENGL 134-25 (1234) – and any information being changed, like instructor name and EmplID. This ensures that we cancel or change the correct class.

Once a class appears on PASS, changes to meeting days or times, consent type, topics, and other registration constraints requires cancellation of the existing section and a new one added to replace it.

Use a list or table format:

(Example) ***Cancel Section for Spring 2014***

Subject, Course, Section Number (class #)	SCM 150-65 (6789)
Related Information/Class Notes	Also remove note #414 from corresponding section, PHYS 141-04 (3456)

(Example) ***Swap Rooms for Spring 2014***

Subject, Course, Section Number (class #)	MATH 143-13 (3456) move to 52-E26
Swap with	MATH 144-06 (2468) move to 186-C203

(Example) ***Assign Instructor for Spring 2014***

Subject, Course, Section Number (class #)	COMS 102-07 (5432)
Assign Instructor	Jerry Fitzgerald / 005678910

Adding a Class

When sending a request to add a class, please provide the following information:

- Subject, Course and Section number
- Instructor Name and EmplID
- Print = Yes or No
- Requested room capacity
- Enrollment capacity
- Meeting days & times and/or TBA hours
- Room, if your own space,
  or if we're holding one for you
- Variable unit course set to fixed unit value
- Reserve seats, Topic or Notes, when applicable

- **Cancel** CM 420-01 (5678).

- **Add new section**: CM 420-02
- Associated Class 2
- Print to PASS
- Set at 3 units
- Topic: Construction Service Learning
- TR 4:10-6:00pm in 186-B203, plus 2 hours TBA
- Instructor: Doe, John empl#001234567
- Room Cap: 26, Enroll Cap: 18, Waitlist Cap: 99
- Reserve all seats for CM Majors only (through add/drop)
- Note: 160

Please use list format (like this example) or table format (shown above and below)

(Example) ***Add Section for Spring 2014***

Subject, Course, Section Number (class #)	SCM 150-63 (new)
Instructor Name and EMPLID	William Sydnor / 000045678
Print = Yes or No	Yes
Topic	(#32) PHYS 141 SWS Workshop
Requested Room Capacity	25 or greater
Enrollment Capacity	20
Waitlist Capacity	99
Meeting Days and Times	Monday/Wednesday 6:10 to 7:30 PM
Room	Bldg. 186 if possible
Related Information/Class Note	Add note #414 to corresponding section, PHYS 141-07 (3285)

Requesting Room Changes

When requesting a room change, please provide the following information:

- Subject, Course, Section and Class number – like, ENGL 134-25 (1234)
- Requested room capacity
- Special room characteristics required (multimedia, distance learning, PC or Mac computer lab)
- Reason for change

If the problem is facility- or equipment-related, please contact Facilities at x6-5550 or Classroom Technologies at x6-7198 to report the problem, as well. Other classes are likely affected, too.

Sample Planning Phase Checklist

This checklist is provided as a sample only. A revised checklist will be included with every planning phase email distribution. New information is added when policies or procedures change.

Winter 2017 (2172) Planning Phase is Due on or before Monday, June 20, 2016
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.
- ☐ Instruction Mode – Used to differentiate online and hybrid courses from the default "In Person" mode.
- ☐ 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/universityscheduling/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, 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 a must.
- ☐ 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)*

- ☐ 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)*

Effective Winter 2017, Reserve Cap will roll from the prior like term (eg 2162>2172).

- ☐ Requirement Group – Verify the student population target will be the same in the upcoming term.
- ☐ Cap Enrl – Verify the number of held seats.

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. As of the 2011-2013 catalog *all* prerequisites are being enforced. Changes to these 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, so learning mode can be specified (asynchronous or synchronous) 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 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.

Sample Proofing Phase Checklist

This checklist is provided as a sample only. A revised checklist will be included with every proofing phase email distribution. New information is added when policies or procedures change.

Fall 2016 (2168) Proofing Phase Checklist & Instructions

Due to University Scheduling by 4pm, Wednesday, April 20, 2016

Schedule of Classes Report (Excel spreadsheet)

- ☐ **Courses with Multiple Components** – Verify that all components (LEC, LAB, SEM, etc.) of a course are being offered
- ☐ **Combined Sections** – Classes combined with another section are indicated with a 'C'. Sections *cannot* be combined once registration has started.
- ☐ **Associated Class Value** – Must reflect corresponding LEC/LAB relationships
- ☐ **Schedule Print** – Classes that will appear on PASS are indicated with a 'Y'.
- ☐ **Consent Required** – A 'D' value indicates that permission is required for students to register for the section. An 'N' value indicates that no permission is required. (See **Permissions** notes below.)
- ☐ **Enrollment Capacity** – Should not exceed requested room capacity or the assigned facility's capacity.
- ☐ **Waitlist Capacity** – Classes that allow students to waitlist should have '99'.
- ☐ **Course Topic ID/Title** – Topic courses without an assigned topic *will not* appear on PASS.
- ☐ **Meeting Pattern** – Start/End times, days of week, correct number of contact hours.
- ☐ **Instructor** – Provide Empl ID when adding an instructor.
- ☐ **Room Assignment** – Room sizes can be found on your list of General Purpose Lecture Rooms, available for download from the University Scheduling website, http://universityscheduling.calpoly.edu/classes.html.
- ☐ **Class Notes** –Verify that ALL class notes are correct and support the enforced requisites and reserve capacities applied to the section.
- ☐ **Reserve Capacity –** Verify student populations and number of held seats are accurate. This must match any Class Note referencing held seats.

- ☐ Please **do not delete** information from the spreadsheet.
- ☐ **To submit changes,** insert a row BELOW the class you are changing, and use **RED** text to indicate changes in the appropriate column of the new row. To remove a specific note or instructor to a class with multiple lines, insert a row BELOW the note you want removed and enter the class number and 'REMOVE ABOVE NOTE' in **RED** text in the 'Note Text' field.
- ☐ **To delete a section,** insert a row BELOW the class you are changing, and enter the class number and 'REMOVE ABOVE SECTION' in **RED** text in the 'Subject' column.
- ☐ **To add an instructor,** insert a row BELOW the class, and enter the instructor's Empl ID and full name in **RED** in the 'Empl ID' and 'Instructor Name' columns.
- ☐ **To communicate special needs,** insert a row BELOW the class and enter your instructions in **RED** text. If we don't see **RED** text, we will assume you have no changes.

Permissions

- ☐ Department Schedulers can generate permission numbers for classes requiring department consent.
- ☐ General permission numbers generate a set of random numbers for a class.
  Permission numbers no longer expire if registration was not successful.
- ☐ Student-specific permissions can only be used by that student. No random number is required.
- ☐ Once registration begins, the consent type cannot be changed.
- ☐ Department Consent courses remain the same throughout the registration process.
  No Consent courses flip to Instructor Consent prior to the start of term.
- ☐ The department must provide instructors with permission numbers for classes set to Department Consent. These permission numbers will not push to the instructor's portal.

The "Schedule of Classes" Dashboard is also available for proofing purposes. Two different views ("Schedule of Classes" and "Classes with Reserved Seats") present your schedule in a format similar to our Excel spreadsheet, but they are built using the data warehouse, which is updated nightly. If you need to verify settings, please refer to PeopleSoft Student Administration.

PeopleSoft Pages for Reviewing Data Online

For Basic Data *Curriculum Management > Schedule of Classes > Update Sections of a Class*

- ☐ **Session**
- ☐ **Section Number**
- ☐ **Component**
- ☐ **Class Type** – Enrollment or Non-enroll
- ☐ **Associated Class**
- ☐ **Consent**
- ☐ **Schedule Print**
- ☐ **Enrollment Capacity**
- ☐ **Wait List Capacity**
- ☐ **Number of Enrolled Students** *(once registration begins)*

For Basic Data *Curriculum Management > Schedule of Classes > Maintain Schedule of Classes*

- ☐ **Meeting Pattern**
- ☐ **Faculty Assignment**
- ☐ **Course Title**
- ☐ **Section Number**
- ☐ **Component**
- ☐ **Class Type** – Enrollment or Non-enroll
- ☐ **Class Status**
- ☐ **Unit Value**

For Reserve Capacity *Curriculum Management > Schedule of Classes > Maintain Schedule of Classes*

- Select the *Reserve Cap* tab.
- Information should reflect your request for the number of seats 'held' for which population and duration. If no information appears, there is no reserve cap set for this class. Keep in mind each section with a reserve capacity should have a corresponding note informing that "some" or "all" seats being held for a specific population of students.

For Enrollment Requirements *Curriculum Management > Schedule of Classes > Adjust Class Associations*

- Go to Class *Requisites* page to view the enrollment controls.

REMEMBER to send your updated spreadsheet – with changes indicated in RED – to University Scheduling (classschedule@calpoly.edu) when you have completed the proofing phase.

Sample Reporting Phase Email

This email is provided as a sample only. A revised email will be included with every reporting phase email distribution. New information is added when policies or procedures change.

Reporting your Final Winter Class Schedule

Attached is the Schedule of Classes spreadsheet needed to complete the Reporting Phase for the Winter 2016 (2162) term. The changes you make to your department's schedule on this spreadsheet will influence reporting to the Chancellor's Office.

Enrollment Data: Due to the timing of our data pull, the class enrollment shown on the spreadsheet may not reflect your final numbers, as students continue to have registration access until Wednesday at 8pm. Please refer to PeopleSoft for accurate final enrollment data. ***You do *not* need to make changes to enrollment data on this spreadsheet.***

Faculty Assignments: Please verify faculty assignments are correct. Every section with enrollment must have an instructor assigned.

Mode of Instruction: The Chancellor's Office is looking more closely at online courses and mode of instruction. The CSU campuses are now required to identify and verify online course offerings as well as provide further information on mode of instruction. During the Proofing Phase, you were asked to verify learning mode. Please check again, paying special attention to any new sections added since the proofing phase. These learning modes should be reflected on the attached document. For reference, the learning mode values are:

Codes for fully online classes (no face-to-face meetings)

01 = asynchronous instructional course section can be offered anywhere (no campus meeting; fully online)

02 = synchronous instructional course section can be offered anywhere (no campus meetings; fully online)

10 = asynchronous instructional course section can be offered anywhere (no campus meetings) with synchronous instructional course section can be offered anywhere (no campus meetings)

Codes for online classes that only meet face-to-face for orientation, mid-term, and final exam

03 = asynchronous instructional course section (orientation, mid-term, final campus meetings allowed)

04 = synchronous instructional course section (orientation, mid-term, final campus meeting allowed)

11 = asynchronous instructional course section (orientation, mid-term, final campus meetings allowed) with synchronous instructional course section (orientation, mid-term, final campus meetings allowed)

Codes for hybrid classes that are a combination of online and face-to-face (meet face-to-face 4 or more times in a term)

05 = asynchronous instructional course section segment with face-to-face course section segment (regular face-to-face meetings from every day to four or more times in a term) aka Hybrid

06 = synchronous instructional course section segment with face-to-face course section segment (regular face-to-face meetings from every day to four or more times in a term) aka Hybrid

Keep in mind that synchronous mode requires a student to login at a specified time and attend class online at the same time as the instructor and fellow students. Asynchronous mode does not require a student to log in at specified times, e.g. independently watch a video posted online, post to discussion boards and forums.

Submitting Changes: In order to reduce the potential for error in interpreting your changes, we ask that you do NOT change the formatting of this document (including paper size, margins, etc.).

1. ***RED*** text is very important, as this will alert us to any changes you've made. *If we don't see **RED** text, we will assume there are no changes.*
2. In order to reduce the potential for error in interpreting your changes, please do NOT change the formatting (including paper size, margins, etc…) of this document.
3. Insert a row below the class you are changing. Use ***RED*** text to identify your changes in the appropriate column of the inserted row.

4. To cancel a section, please insert a row <u>below</u> the class you want cancelled and type in ***RED*** text 'Cancel' in the 'Subject' field and the class number in the 'Class Nbr' field. This method minimizes confusion and eliminates the need for follow-up communications.
5. If changes to faculty assignments are required, please provide the instructor's Employee ID (Empl ID) and full name. *Please note: There may be multiple instructors in the system with similar names, so the Employee ID is required for us to complete the requested change.*
6. There may be multiple lines on the spreadsheet to allow printing of multiple notes, instructors, meeting patterns, etc. If the class number is repeated on another line, <u>it is the same class</u>. You can <u>make changes once per class number</u> and ignore multiple lines. (If in doubt about class set up, please verify information in PeopleSoft via the Schedule of Classes prior to making changes to your spreadsheet.)

Return your corrected spreadsheet to classschedule@calpoly.edu by Wednesday, January 20th, at 4 p.m.

Sample Reporting Worksheet

Term	Asubject	Catalog Nbr	Class Nbr	Component	Section Nbr	Associated Class Value	Schedule Print	Consent Type	Requested Room Capacity	Enrollment Capacity	Enrolled	Waitlist Capacity	Topic ID	Topic Title	Combined Section	Facility ID	Start Time	End Time	Monday	Empl ID	Instructor Name	Grading Basis	Requisite #	
2162	BIO	500	7454	IND	01	1	Y	D	12	12	5	99	0									OPT	1833	GR Star
			7454																	003938801	Strand,Christine R 20%			
			7454																	008388051	White,Corwith C 40%			
			7454																	000302688	Yeung,Po Sai Marie 40%			
	BIO	500	7456	IND	02	2	N	D	12	12	8	99	0									OPT	1833	GR Star
			7456																	000088643	Adams,Nikki L 13%			
			7456																	000116151	Ritter,Matthew K 42%			
			7456																	000290221	Winstead,Candace R 21%			
			7456																	000026022	Yost,Jennifer M 24%			
	BIO	500	7457	IND	03	3	N	D	12	12	1	99	0									OPT	1833	GR Star
			7457																	008388051	White,Corwith C 95%			
			7457																	000026022	Yost,Jennifer M 5%			
	BIO	502	2790	LEC	01	1	Y	I	24	24	13	99	0			022 -0210	8:10 AM	9:30 AM		000288973	Tomanek,Lars	OPT	1836	BIO 501
	BIO	502	5729	LAB	02	1	Y	I	24	24	13	99	0			053 -0313	3:10 PM	6:00 PM		000288973	Tomanek,Lars	OPT	1836	BIO 501

The spreadsheet above illustrates a returned Reporting Phase spreadsheet with shared course load, properly reported.

PeopleSoft Data Entry Guide - Overview

These areas of PeopleSoft are where you'll complete your data entry and can proof your information. Some information is entered only by the Scheduling office. If you need changes in those areas, email your information in your special instructions at the planning deadline.

Schedule New Course

Basic Data

- Add new sections of a course *not* currently scheduled for the term.
- Refer to next section, "Maintain Schedule of Classes | Basic Data", for details.

Maintain Schedule of Classes

Basic Data

- Add and delete sections of a course currently scheduled for the term.
- Identify enrollment and associated components.
- Identify Print settings, Topic (if applicable), and Student-Specific Permissions.

Meetings

- Enter meeting and instructor information.
- Multiple meeting patterns are needed if meeting in different locations regularly throughout the term (i.e., M in computer lab, TWR in lecture room) or if there are additional TBA hours needed to fulfill the course requirement.

Enrollment Control

- Enter enrollment controls like consent and capacity.

Reserve Capacity

- Effective Winter 2017, Reserve Capacities will roll from prior like term (eg. 2162>2172).
- Verify number of seats reserved for specific student population (major, new freshmen/transfers, class level).
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate needs in your special instructions during planning phase.
- Cannot be coded if Enrollment Capacity = 0.

Notes

- Communicate important information to students prior to registration.
- Communicate any special needs in your special instructions during planning phase. Do not rely on UNIVERSITY SCHEDULING reading these Class Notes.

Adjust Class Associations

Class Associations

- Identify fixed or variable unit values for each enrollment component.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate unit value-related needs in your special instructions during planning phase.

Adjust Class Associations | Class Components

- Identify contact and workload hours for each enrollment and component.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate unit value-related needs in your special instructions during planning phase.

Adjust Class Associations | Class Requisites

- Identifies which catalog requisites are being enforced.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate requisite-related needs in your special instructions during planning phase.

Update Sections of a Class

Class Status

- Identify and update enrollment and associated components.
- Identify and update Print setting and Consent type.
- Check class status (active or cancelled).

Class Enrollment Limits

- Identify and update enrollment and wait list capacities.
- Monitor enrollment and wait list totals.

Catalog

Catalog Data

- View course title and description, unit value, grading basis, repeat rules, requirement designations, course attributes, and approved topics. These parameters are set during the course approval process.

Offerings

- Identify terms when a course is typically scheduled.
- Identify which requirements are being enforced at the catalog level.

Components

- Identify required component types, and, if more than one, which is the Primary Component and which is the Graded Component.
- Identify contact hours and workload hours for each component.

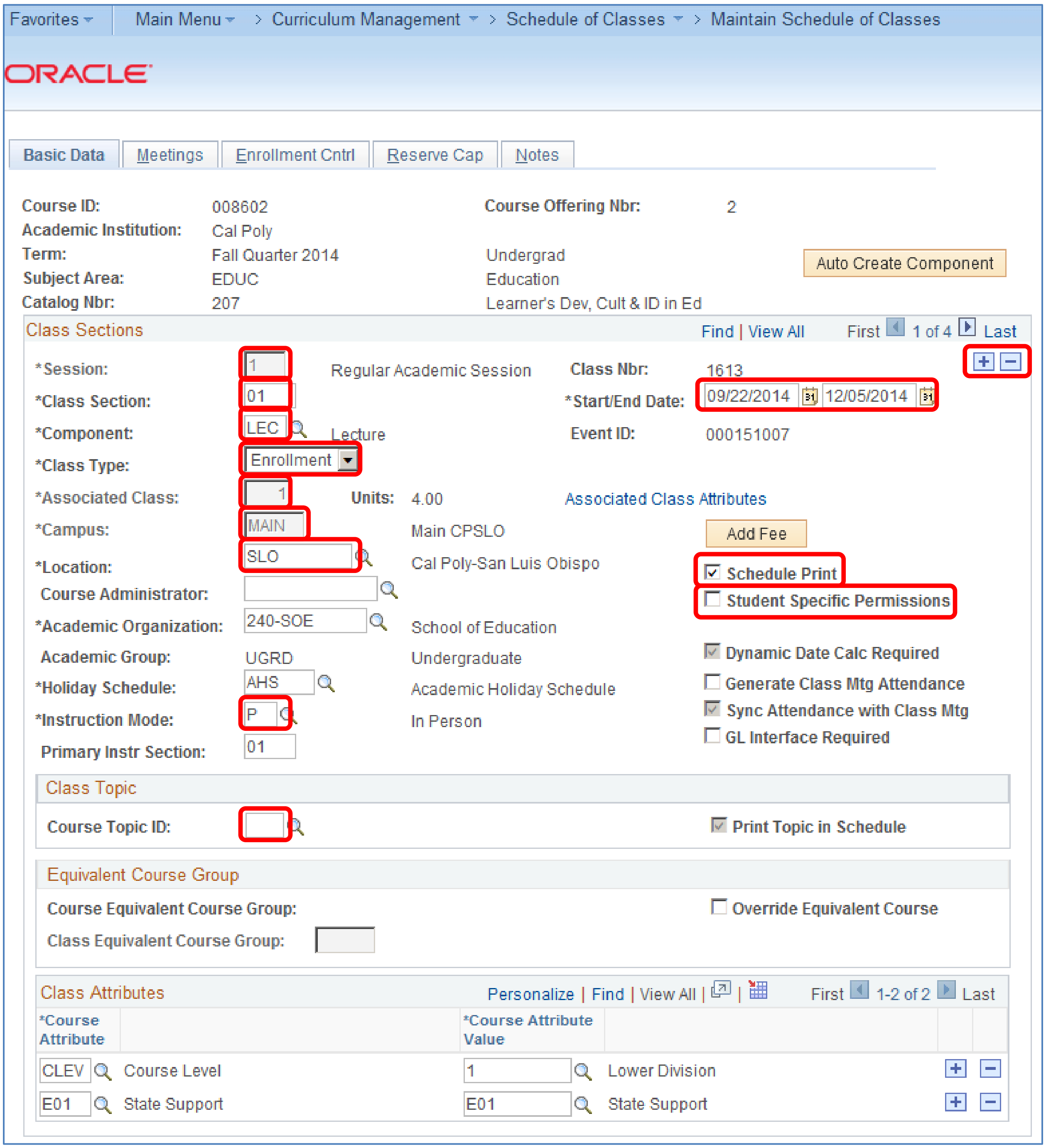
● = Mandatory information for every section. Additional information can be found on the University Scheduling website at: http://registrar.calpoly.edu/universityscheduling/classes

Schedule New Course | Basic Data

- Add new sections of a course *not* currently scheduled for the term.
- Refer to next section, “Maintain Schedule of Classes | Basic Data”, for details.

Maintain Schedule of Classes | Basic Data

- Add and delete sections completely.
- Identify enrollment and associated components.
- Identify Print settings, Topic (if applicable), and Student-Specific Permissions.



● **Session:** *Summer only* Specify First 5 weeks, Second 5 weeks, 8 weeks or Regular 10 week session.

● **Class Section:** Should always be two digits, e.g. 01, 45, 70, etc.

● **Component:** Based on catalog/curriculum requirements. Classes can contain more than one type (i.e., LEC/LAB).

● **Class Type:** Enrollment or non-enrollment. Classes with more than one Component type require both Enrollment and Non-enrollment sections.

● **Associated Class:** Creates relationship between Enrollment and Non-enrollment sections. To associate a non-enrollment section with any enrollment section, i.e. student can take any lab with any lecture, use value '9999'.

● **Location:** Defaults to SLO. Identify off-site classes (Swanton Pacific Ranch, Vandenberg AFB, study abroad) here.

● **Instruction Mode:** *Online sections only* (All TBA IND classes are In Person/Face-to-Face.) Identifies Synchronous vs Asynchronous online instruction. Class APDB Mapping Values also should be updated with the correct Learning Mode.

● **Class Nbr:** Automatically generates when you first save your new section.

+ and - : Add or delete a section permanently using these buttons.

● **Start/End Date:** *Summer only* First day of session to last day of class. For other terms, use default dates.

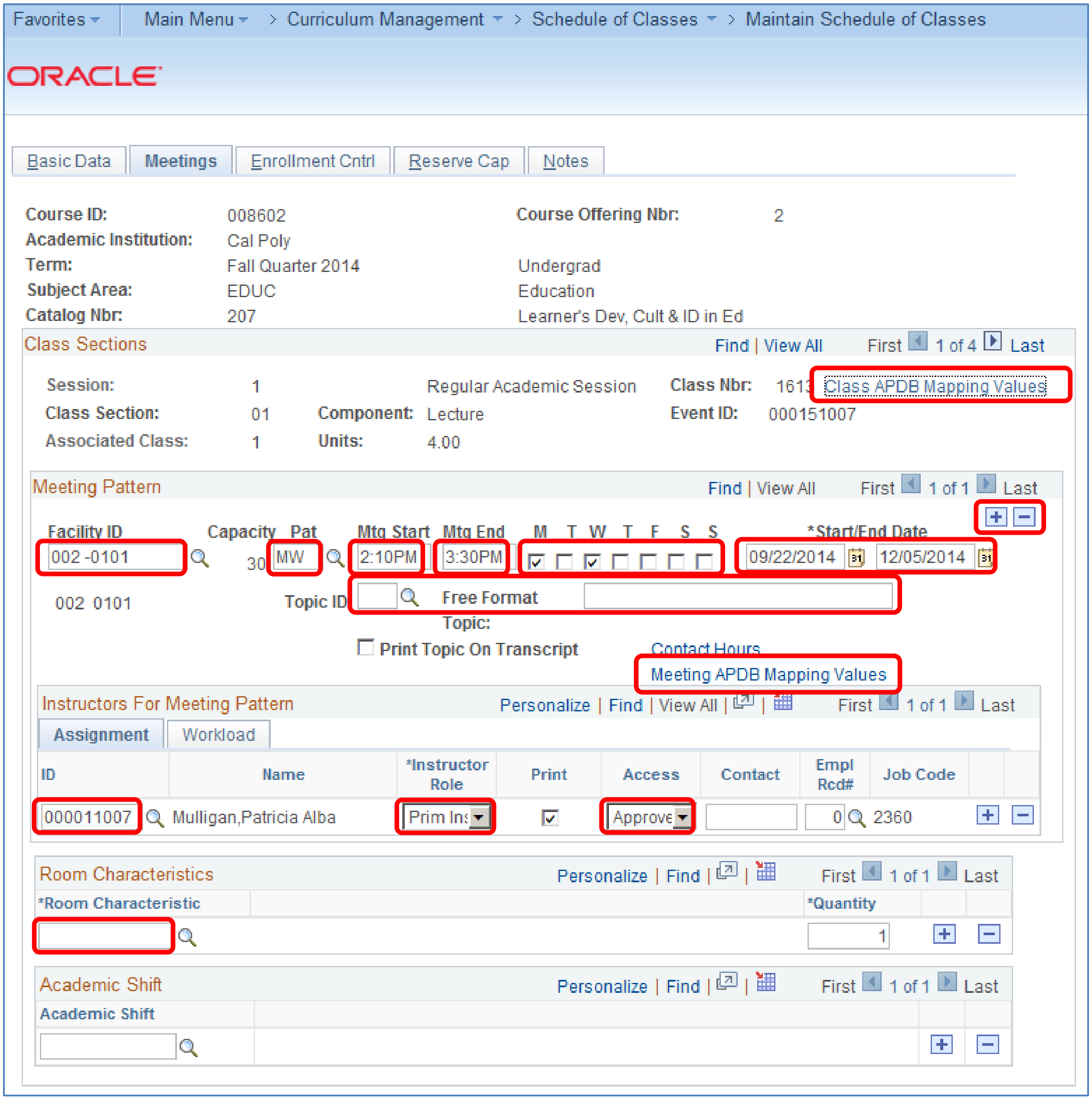
● **Schedule Print:** Check to allow section to appear on PASS/CPReg.

● **Student Specific Permissions:** Check to enter EmplID on Permission page instead of using randomly-generated permission numbers. You cannot change permission types once registration begins.

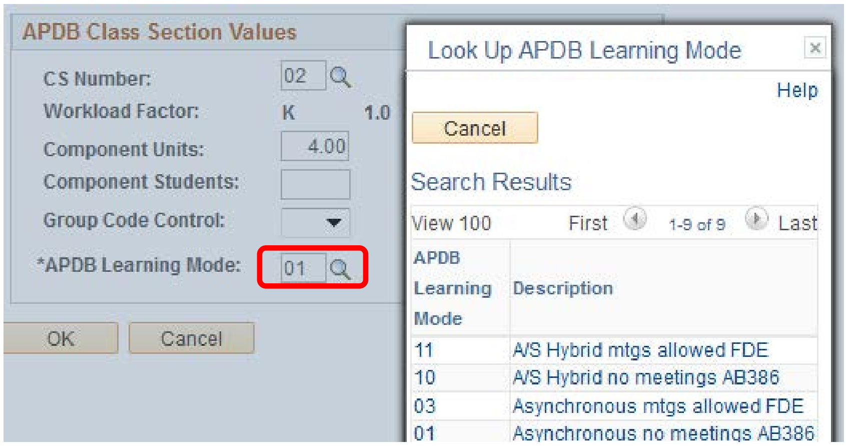
● **Course Topic ID:** Choose from list of previously-approved topics for subtopic courses. (Only applies to selected topic and subtopic courses.) If topic has not yet been approved, leave blank. You will receive a *warning* message when you save if this field is needed and is blank. It's okay to proceed. Topics must be assigned prior to classes being made available on PASS or for registration. All topics must be approved through a process outlined in the Curriculum Handbook, http://registrar.calpoly.edu/content/curriculum-handbook-table-contents.

Maintain Schedule of Classes | Meetings

- Enter meeting and instructor information.
- Multiple meeting patterns are needed if meeting in different locations regularly throughout the term (i.e., M in computer lab, TWR in lecture room).



+ and **- :** Add or delete a meeting pattern permanently using these buttons. There are several reasons why a class may have multiple meeting patterns. Be sure to assign the instructor, if known, for all patterns. You will receive a *warning* message when you save. It's okay to proceed.



Class APDB Mapping Values

● **APDB Class Section Values:** For courses with any online component, the APDB Learning Mode must be entered so that the correct mode is reported.

● **Facility ID:** Enter department-controlled space, most frequently used for ACT/LAB sections. University lecture rooms will be assigned to LEC/SEM sections by the Scheduling office during the planning phase.

● **Pat:** Enter approved meeting day pattern, if available. This is the fastest and best way to ensure you correctly choose the meeting days. Find the Approved Time Patterns on the UNIVERSITY SCHEDULING website. Classes with no required meeting time should be entered 'TBA'.

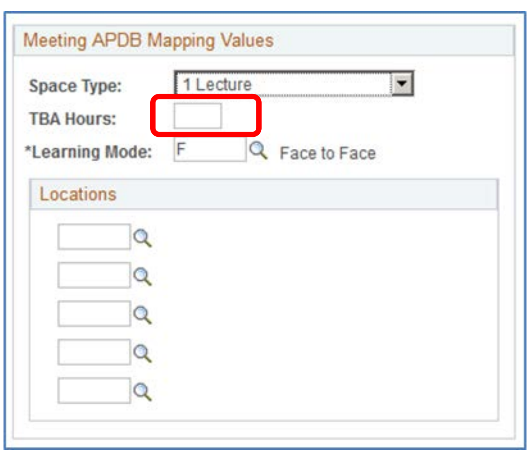
● **Mtg Start:** Enter approved meeting start time, typically :10 or :40 after the hour. Find the Approved Time Patterns on the UNIVERSITY SCHEDULING website.

● **Mtg End:** Enter approved meeting start time, typically at the top (:00) or bottom (:30) of the hour. Find the Approved Time Patterns on the UNIVERSITY SCHEDULING website. Do not assume the auto-fill value will be correct.

● **M, T, W, T, F, S, S:** Check meeting days. Will auto-populate if you enter information in the Pat field. If pattern not available in Pat field, check meeting days here.

● **Start/End Dates:** *Summer only* First day of session to last day of class. All other terms use default dates.

● **Topic ID** and **Free Format Topic:** DO NOT USE THESE FIELDS. Enter your approved topic on the 'Basic Data' tab.



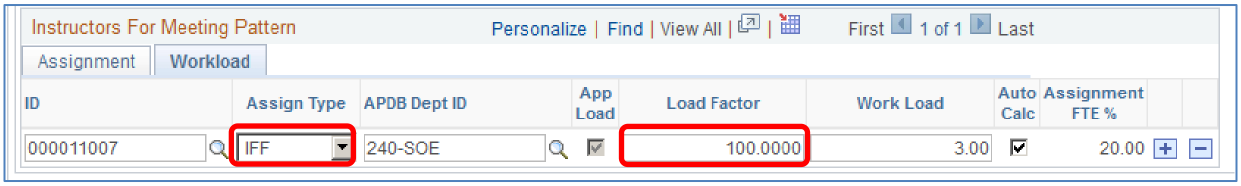
Meeting APDB Mapping Values

● **TBA Hours:** For all sections scheduled TBA, designate the number of TBA Hours, based on the component type and unit value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

● **Instructor ID:** 9-digit instructor EmplID. If instructor is not available or comes up as error, contact UNIVERSITY SCHEDULING to update instructor table and allow instructor to be assigned. Multiple instructors may be assigned if team-teaching. Be sure to designate teaching percentage on 'Workload' tab (see below).

● **Instructor Role:** Leave as Prim Inst. DO NOT CHANGE THIS FIELD.

● **Access:** Must set to 'Approve' after assigning instructor to allow information to appear in Faculty portal and instructor to access class through PolyLearn.



● **Assign Type:** Should always be IFF for first meeting pattern. Subsequent meeting patterns should be set to 'Not Include' to avoid miscalculating the WTUs.

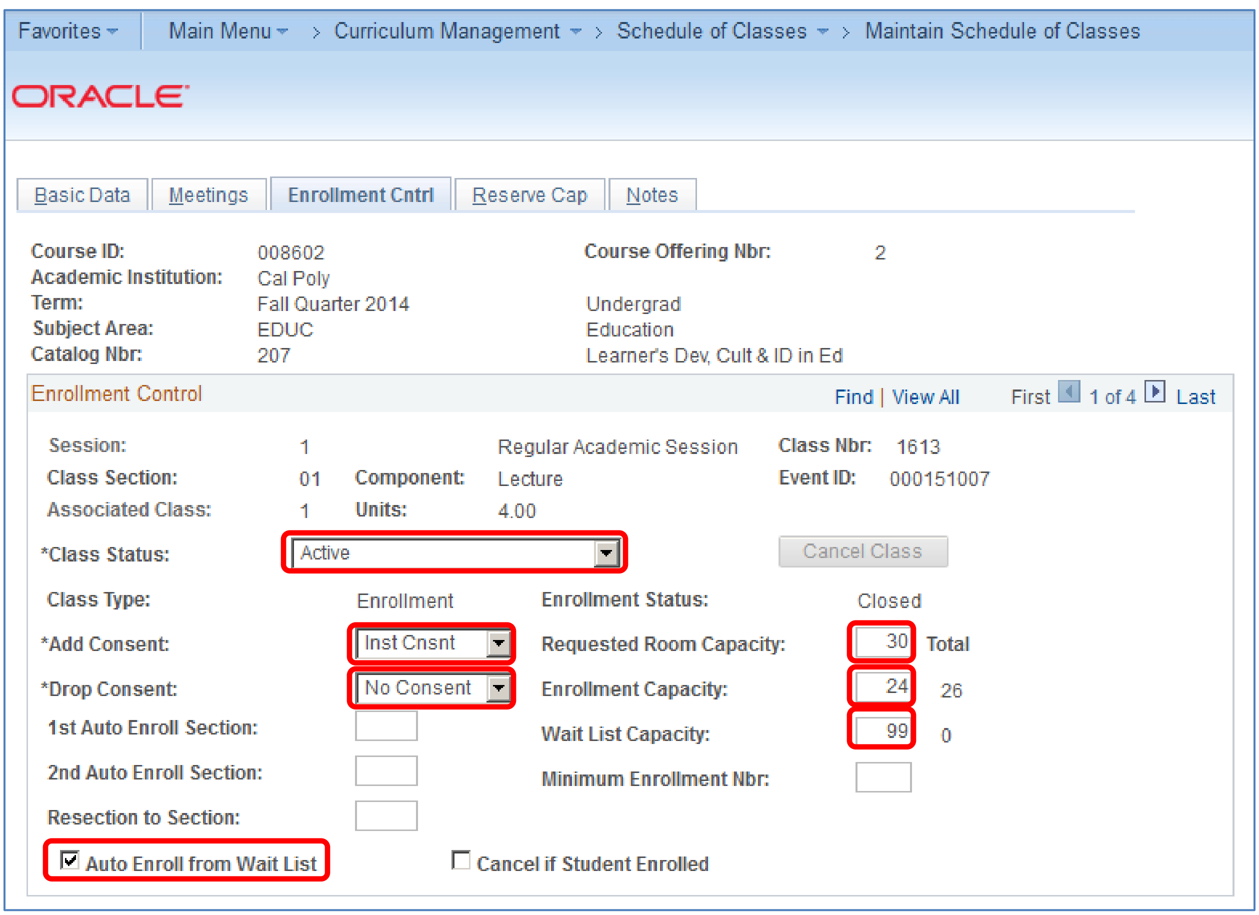
● **Load Factor:** If section is team-taught, enter percentage of workload for each instructor. Must total 100 or you will receive a *warning* message. Verify workload (WTU) has calculated correctly in the 'Work Load' field to the right.

● **Room Characteristics:** Enter code for multimedia (MM), Distance Learning (DL), Computer Lab, GIS/CAD requirements to be placed in a room with the appropriate equipment. Do not specify Smart Room Technology. All university lecture rooms contain Smart technology.

Schedule New Course | Enrollment Control

Maintain Schedule of Classes | Enrollment Control

- Enter enrollment controls like consent and capacity.



● **Class Status:** Should always be 'Active' to offer the class. If section is cancelled before appearing on PASS, section will be deleted using Basic Data tab. Section will appear as 'Cancelled' here if class is cancelled after it has appeared on PASS. All cancellations are completed by UNIVERSITY SCHEDULING. DO NOT CHANGE THIS FIELD.

● **Add Consent:** Defaults to 'No Consent'. 'Inst Consent' and 'Dept Consent' are also available. Both require a student to use a permission number to enroll. Sections set to 'Inst Consent' will push the permission numbers to the Faculty Center. Permissions will not appear in the Faculty Center if set to 'Dept Consent.'

● **Drop Consent:** Defaults to 'No Consent'. DO NOT CHANGE THIS FIELD.

● **Requested Room Capacity:** Defaults to 35. Room size will determine lecture room placement. Must be greater than or equal to Enrollment Capacity. Use historical and PolyPlanner data to request a realistic size. Also consider pedagogical requirements and ask for a slightly larger room if a class frequently breaks into small groups.

● **Enrollment Capacity:** Defaults to 35. Must be less than or equal to 'Requested Room Capacity.' During block enrollment (FALL only), the Registrar's Office will decrease and increase these at the appropriate times. Enter what will be your final enrollment capacity here.

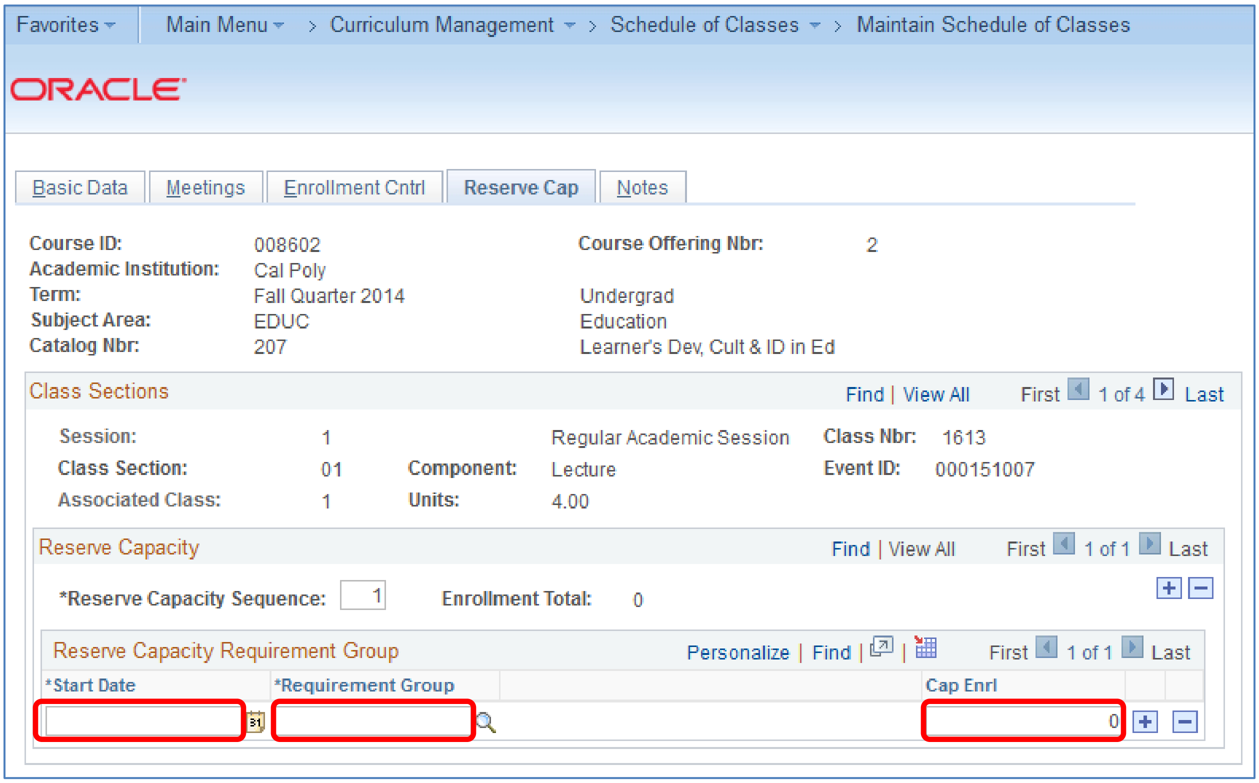
● **Wait List Capacity:** Defaults to 0. Enter '99' for all sections eligible to use a wait list. (Mutual corequisites are not eligible to use a wait list. Concurrent enrollment must be processed simultaneously, and the wait list engine will only process one transaction at a time, so students will never be enrolled via the wait list. Contact UNIVERSITY SCHEDULING if you have questions.)

● **Auto Enroll from Wait List:** De-select if section is not eligible for wait list. (See mutual corequisite information above.)

Schedule New Course | Reserve Capacity

Maintain Schedule of Classes | Reserve Capacity

- Effective Winter 2017, Reserve Cap will roll from the prior like term (eg. 2162>2172).
- Identify number of seats reserved for specific student population (major, new freshmen/transfers, class level).
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate needs in your special instructions during planning phase.
- Cannot be coded if 'Enrollment Capacity' = 0.



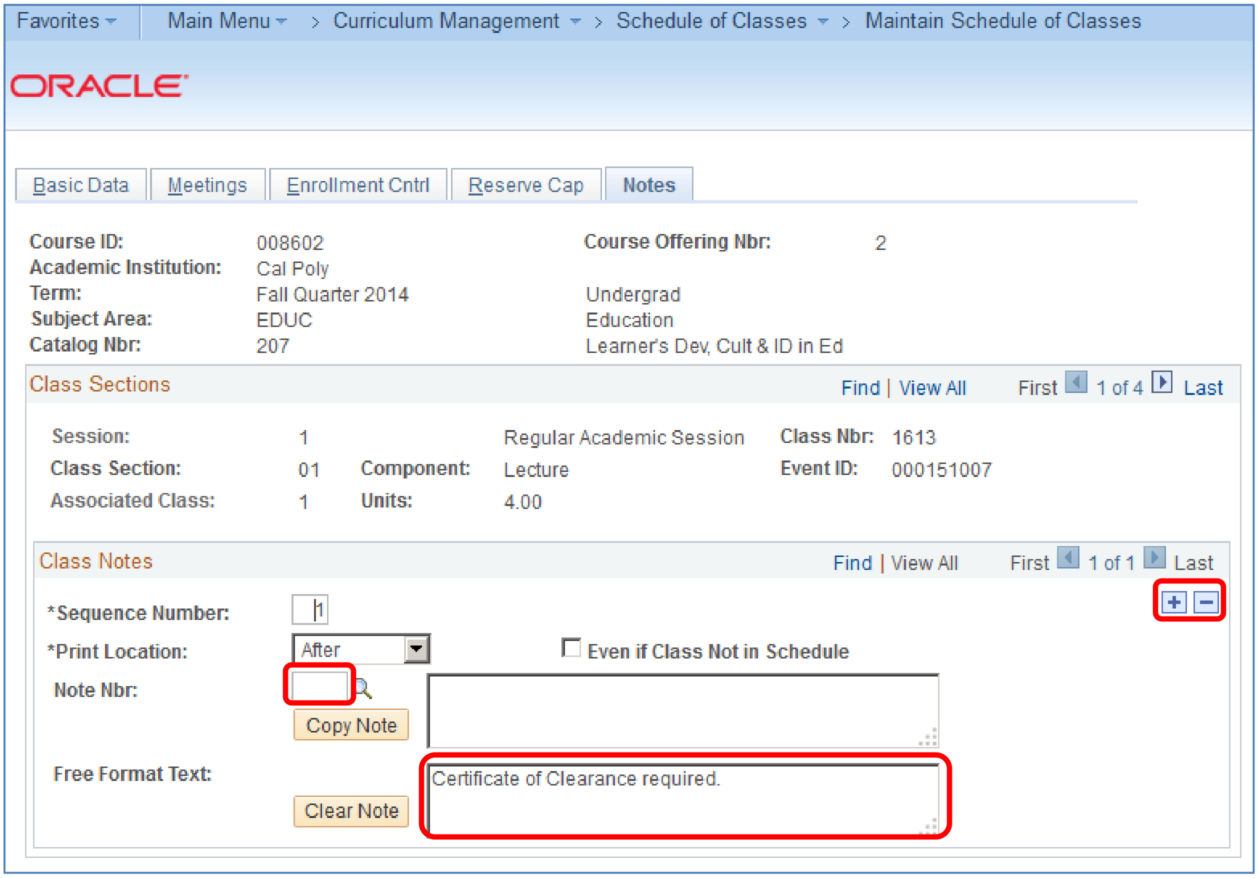
● **Start Date:** First day of registration. A second date will identify the date any remaining reserved seats are released to any eligible student (typically, the first day of open enrollment). Must include a Class Note to identify the student population and if/when the reserve seats will be made available to any eligible student.

● **Requirement Group:** Identifies student population eligible to use reserved seats.

● **Cap Enrl:** Number of reserved seats. Must be less than or equal to Enrollment Capacity. Will be '0' for date seats are released to any eligible student.

Maintain Schedule of Classes | Notes

- Communicate important information to students prior to registration.
- Communicate any special needs in your special instructions during planning phase. Do not rely on UNIVERSITY SCHEDULING reading and acting upon these Class Notes.



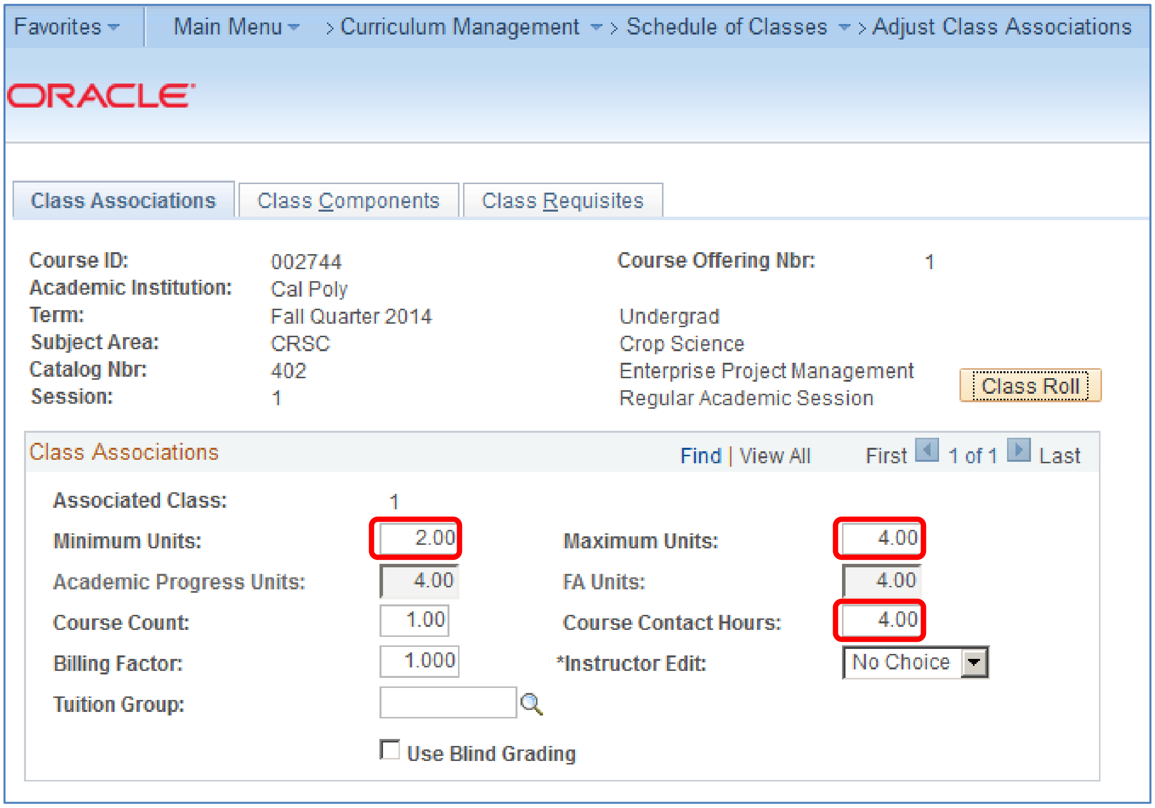
● **Note Nbr:** Enter note number for frequently-used notes, i.e., note 005 is 'Contact instructor for consent' and note 011 is 'For majors only.'

● **Free Format Text:** Enter free-format text when specific information and note text not available in standard notes.

+ and **- :** Add or delete a class note permanently using these buttons. Be sure to use appropriate punctuation. Multiple notes display as one paragraph in PASS and CPReg.

Adjust Class Associations | Class Associations

- Identify fixed or variable unit values for each enrollment component.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate unit value-related needs in your special instructions during planning phase.

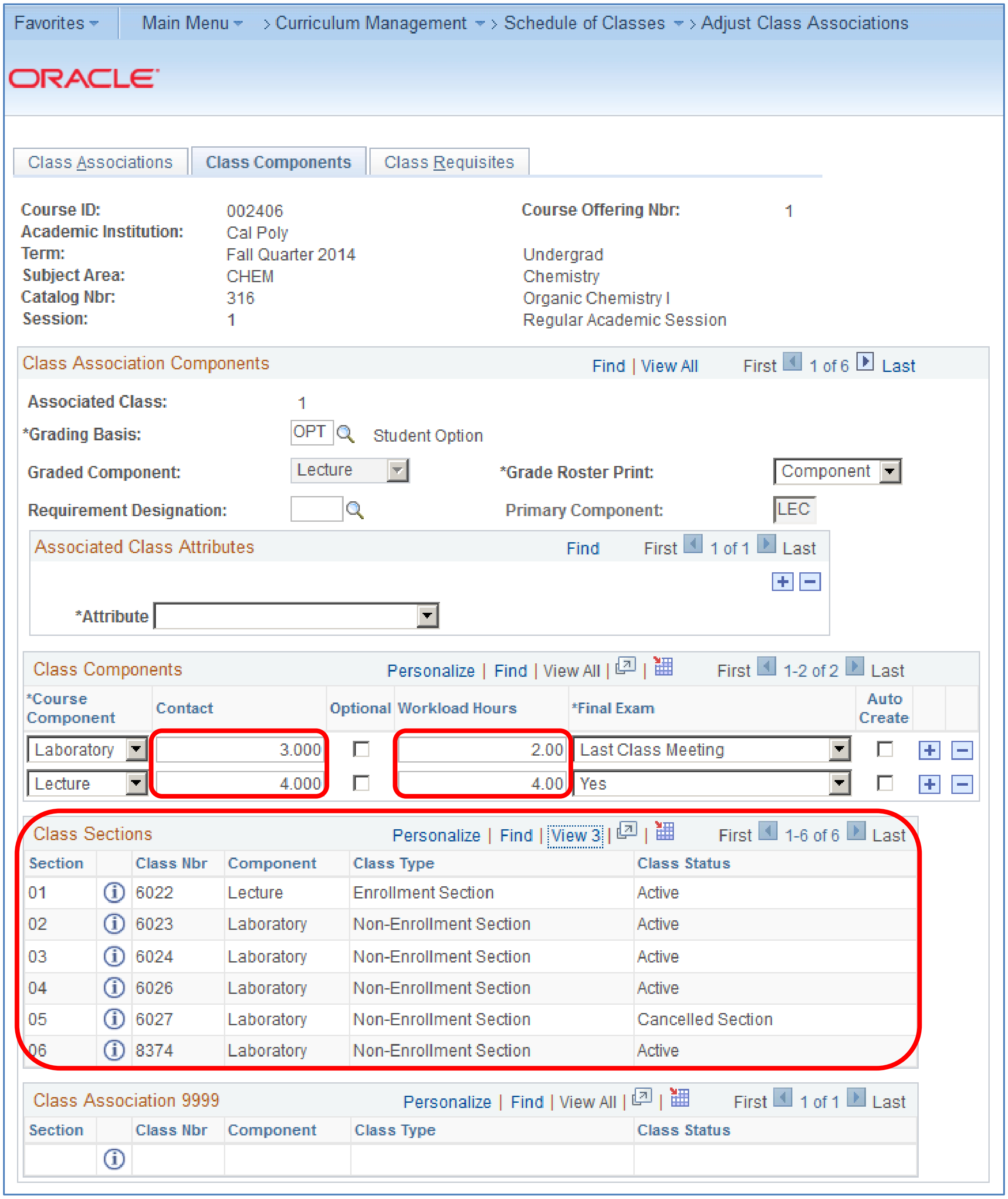


- **Minimum Units** and **Maximum Units:** Identify minimum and maximum units for variable unit sections. Fields will match for fixed unit sections.

- **Course Contact Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

Adjust Class Associations | Class Components

- Identify contact and workload hours for each enrollment and component.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate unit value-related needs in your special instructions during planning phase.



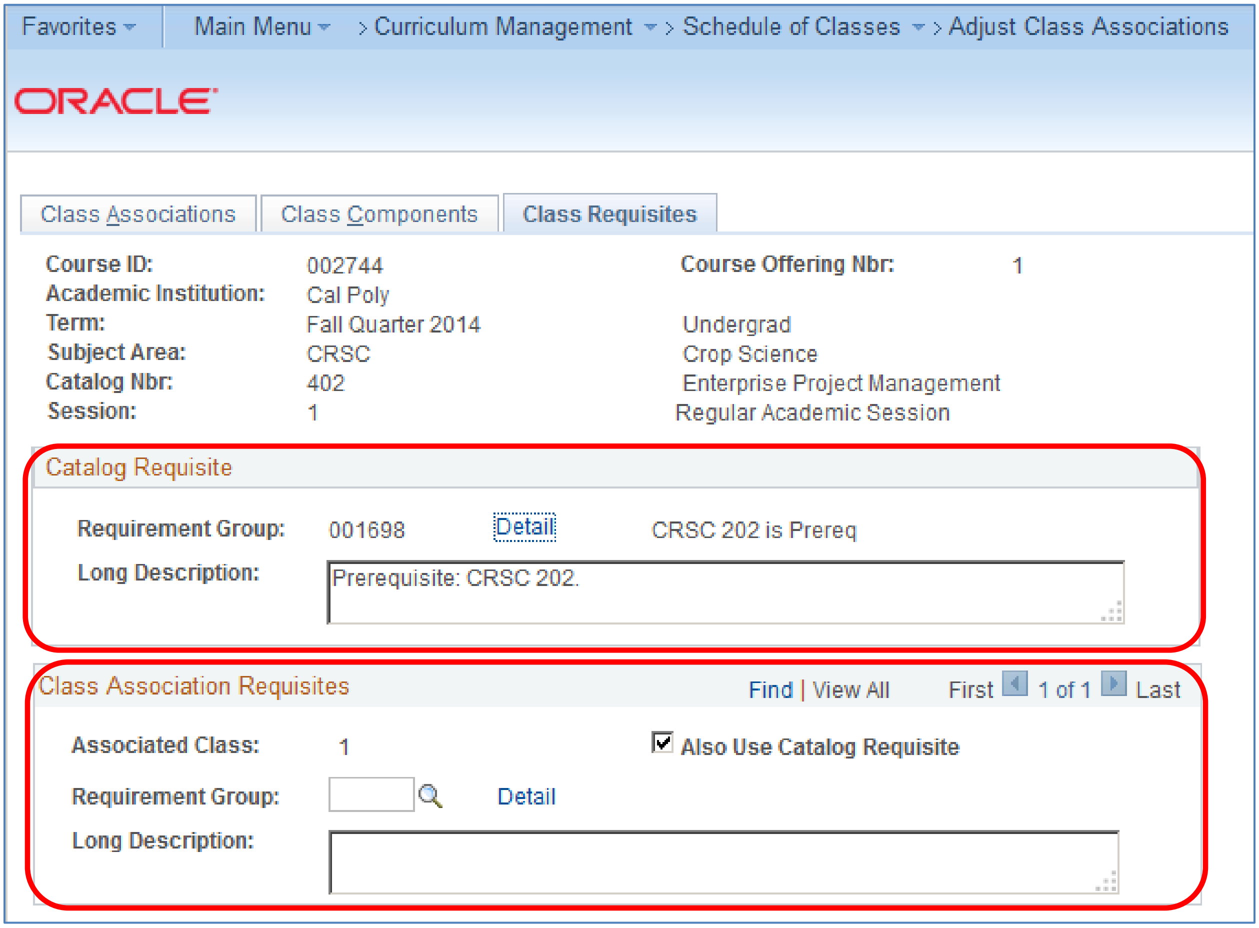
- **Contact Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

- **Workload Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

- **Class Sections:** Identifies Enrollment and associated sections, as well as Active and Cancelled classes.

Adjust Class Associations | Class Requisites

- Identifies which catalog requisites are being enforced.
- ALL INFORMATION WILL BE ENTERED BY UNIVERSITY SCHEDULING. Communicate requisite-related needs in your special instructions during planning phase.

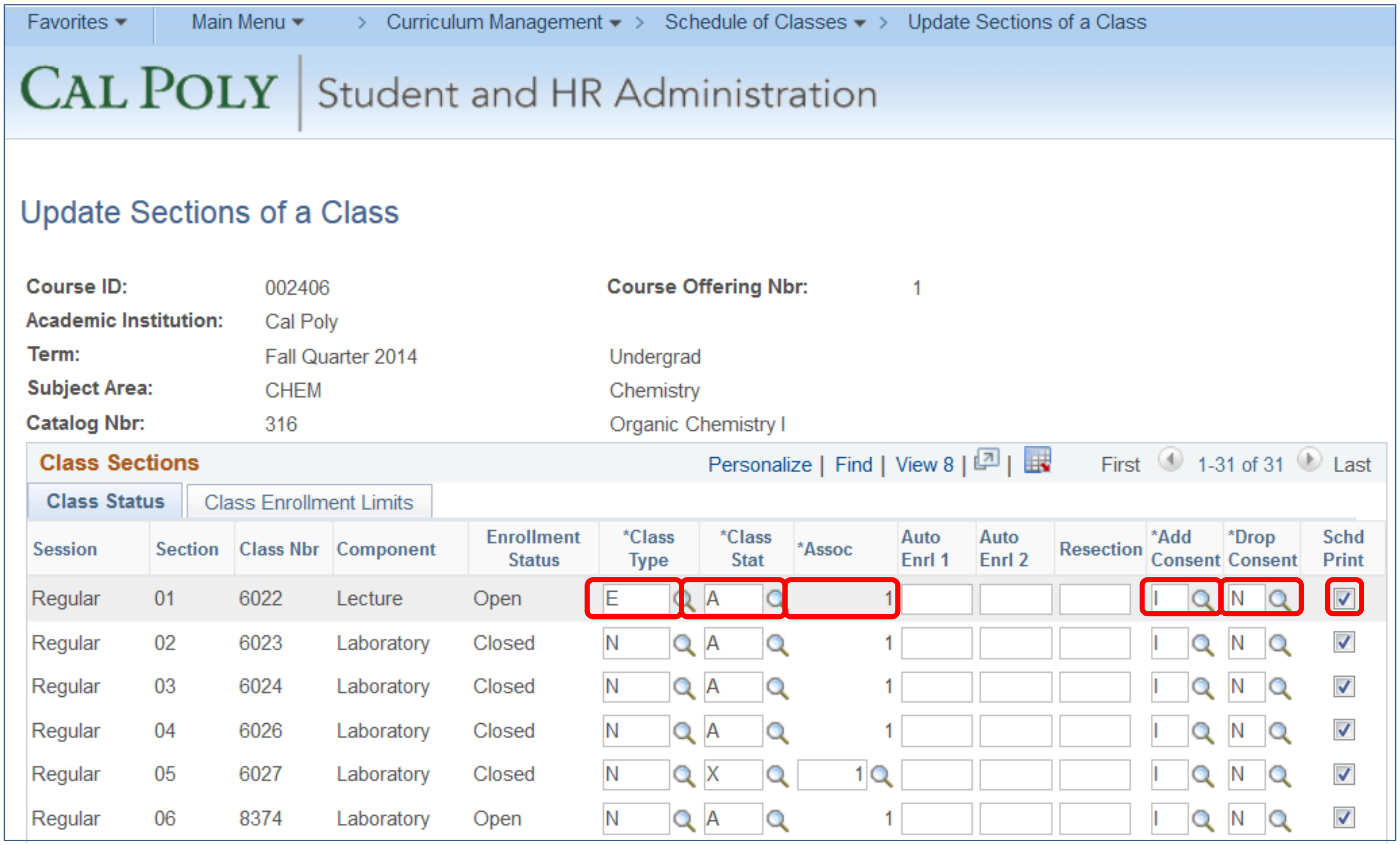


● **Catalog Requisite:** Identifies which catalog requisites are being enforced. (All prerequisite courses listed in the catalog description are enforced.)

● **Class Association Requisites:** Requirements enforced for a specific section or term.

Update Sections of a Class | Class Status

- Identify and update enrollment and associated components.
- Identify and update Print setting and Consent type.
- Check class status (active or cancelled).


Favorites ▾ Main Menu ▾ > Curriculum Management ▾ > Schedule of Classes ▾ > Update Sections of a Class

CAL POLY | Student and HR Administration

Update Sections of a Class

Course ID: 002406 Course Offering Nbr: 1
Academic Institution: Cal Poly
Term: Fall Quarter 2014 Undergrad
Subject Area: CHEM Chemistry
Catalog Nbr: 316 Organic Chemistry I

Class Sections — Personalize | Find | View 8 | First 1-31 of 31 Last

Class Status | Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Add Consent	*Drop Consent	Schd Print
Regular	01	6022	Lecture	Open	E	A	1				I	N	☑
Regular	02	6023	Laboratory	Closed	N	A	1				I	N	☑
Regular	03	6024	Laboratory	Closed	N	A	1				I	N	☑
Regular	04	6026	Laboratory	Closed	N	A	1				I	N	☑
Regular	05	6027	Laboratory	Closed	N	X	1				I	N	☑
Regular	06	8374	Laboratory	Open	N	A	1				I	N	☑

- **Class Type:** Enrollment or non-enrollment sections.

- **Class Status:** Active or cancelled sections.

- **Assoc:** Associated Class Value. Identifies associated components.

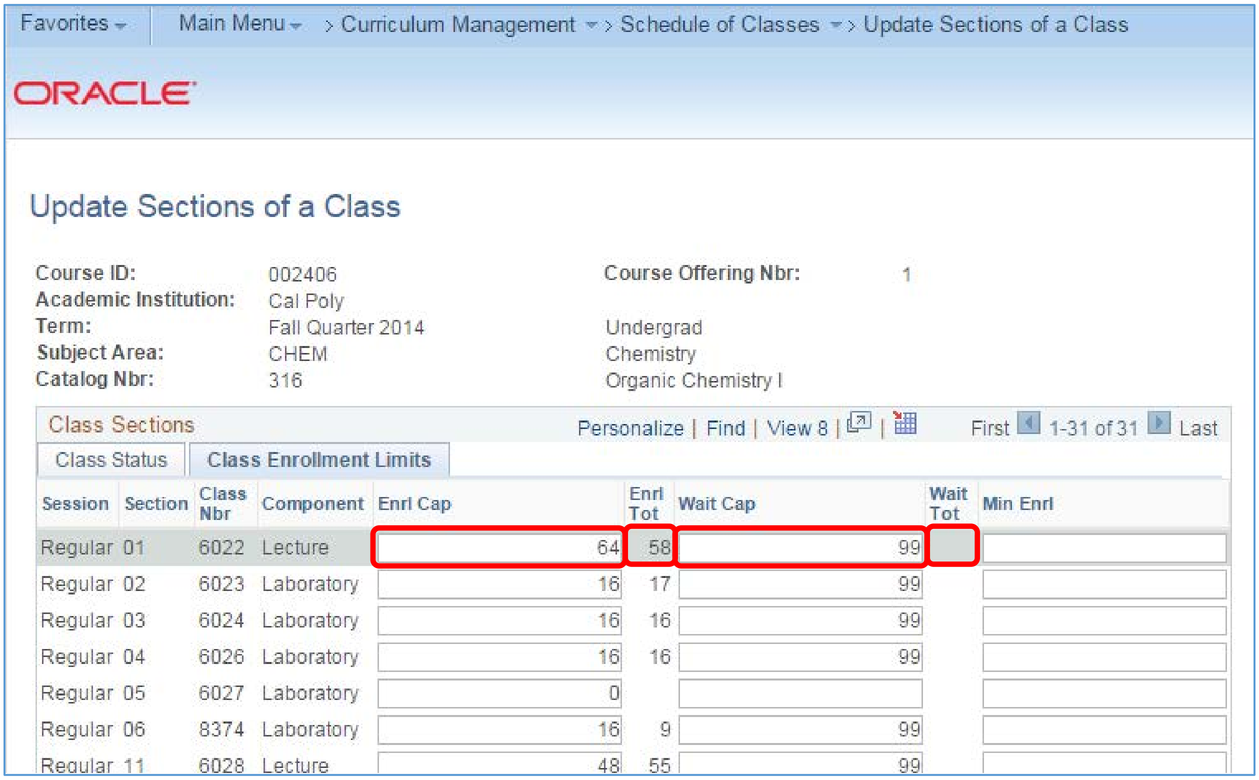
- **Add Consent:** Defaults to 'No Consent.' 'Inst Consent' and 'Dept Consent' are also available. Both require a student to use a permission number to enroll. Sections set to 'Inst Consent' will push the permission numbers to the Faculty Center. Permissions will not appear in the Faculty Center if set to 'Dept Consent.'

- **Drop Consent:** Defaults to 'No Consent.' DO NOT CHANGE THIS FIELD.

- **Schd Print:** Check to allow section to appear on PASS/CPReg.

Update Sections of a Class | Class Enrollment Limits

- Identify and update enrollment and wait list capacities.
- Monitor enrollment and wait list totals.

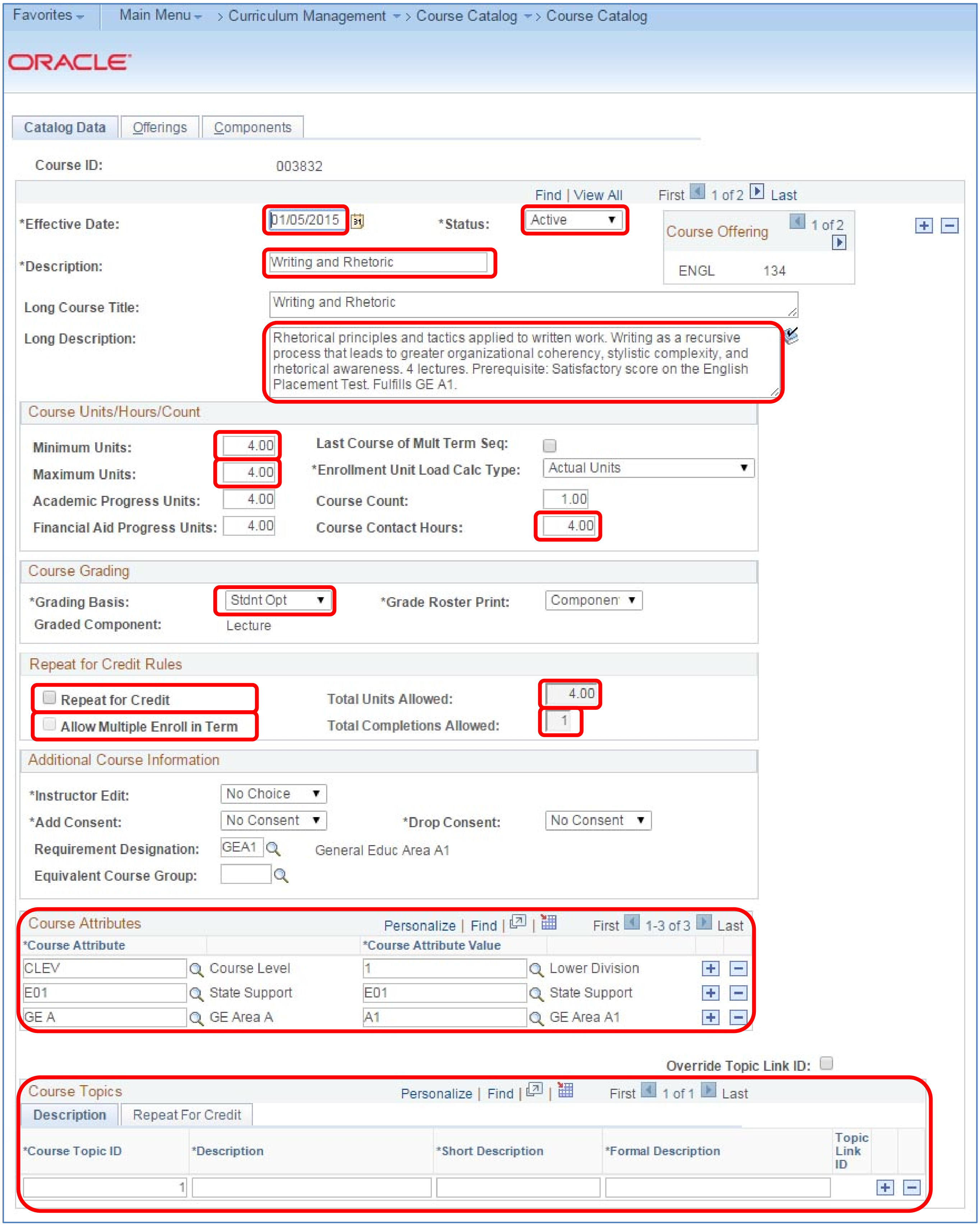


Session	Section	Class Nbr	Component	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Min Enrl
Regular	01	6022	Lecture	64	58	99		
Regular	02	6023	Laboratory	16	17	99		
Regular	03	6024	Laboratory	16	16	99		
Regular	04	6026	Laboratory	16	16	99		
Regular	05	6027	Laboratory	0				
Regular	06	8374	Laboratory	16	9	99		
Regular	11	6028	Lecture	48	55	99		

- **Enrl Cap:** Enrollment Capacity. Defaults to 35.
- **Enrl Tot:** Enrollment Total. Number of enrolled students.
- **Wait Cap:** Wait List Capacity. Defaults to 0.
- **Wait Tot:** Wait List Total. Number of wait listed students.

Catalog | Catalog Data

- View course title and description, unit value, grading basis, repeat rules, requirement designations, course attributes, and approved topics. These parameters are set during the course approval process.



● **Effective Date:** A new effective date is assigned each time there is a change to a course offering. New rows are added as needed. Effective dates enable you to track historical course changes.

● **Status:** *Active* courses are available for scheduling. *Inactive* courses are no longer able to be offered.

● **Description:** Course title.

● **Long Description:** Catalog description including topics covered and expected learning outcomes. Also includes administrative information, such as required component hours, prerequisite information, and general education area credit.

● **Minimum Units** and **Maximum Units:** Identify minimum and maximum units for variable unit sections. Fields will match for fixed unit sections.

● **Course Contact Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

● **Grading Basis:** Grading type.

● **Repeat for Credit:** Designates whether a class may be taken multiple times for additional credit, as opposed to repeating for grade improvement only.

● **Allow Multiple Enroll in Term:** If the 'Repeat for Credit' box is checked and this box is checked, a student may take multiple sections of a class within the same term. This is most commonly available for courses with selected topics or subtopics.

● **Total Units Allowed:** If the 'Repeat for Credit' box is checked, this will indicate how many units may be taken for credit.

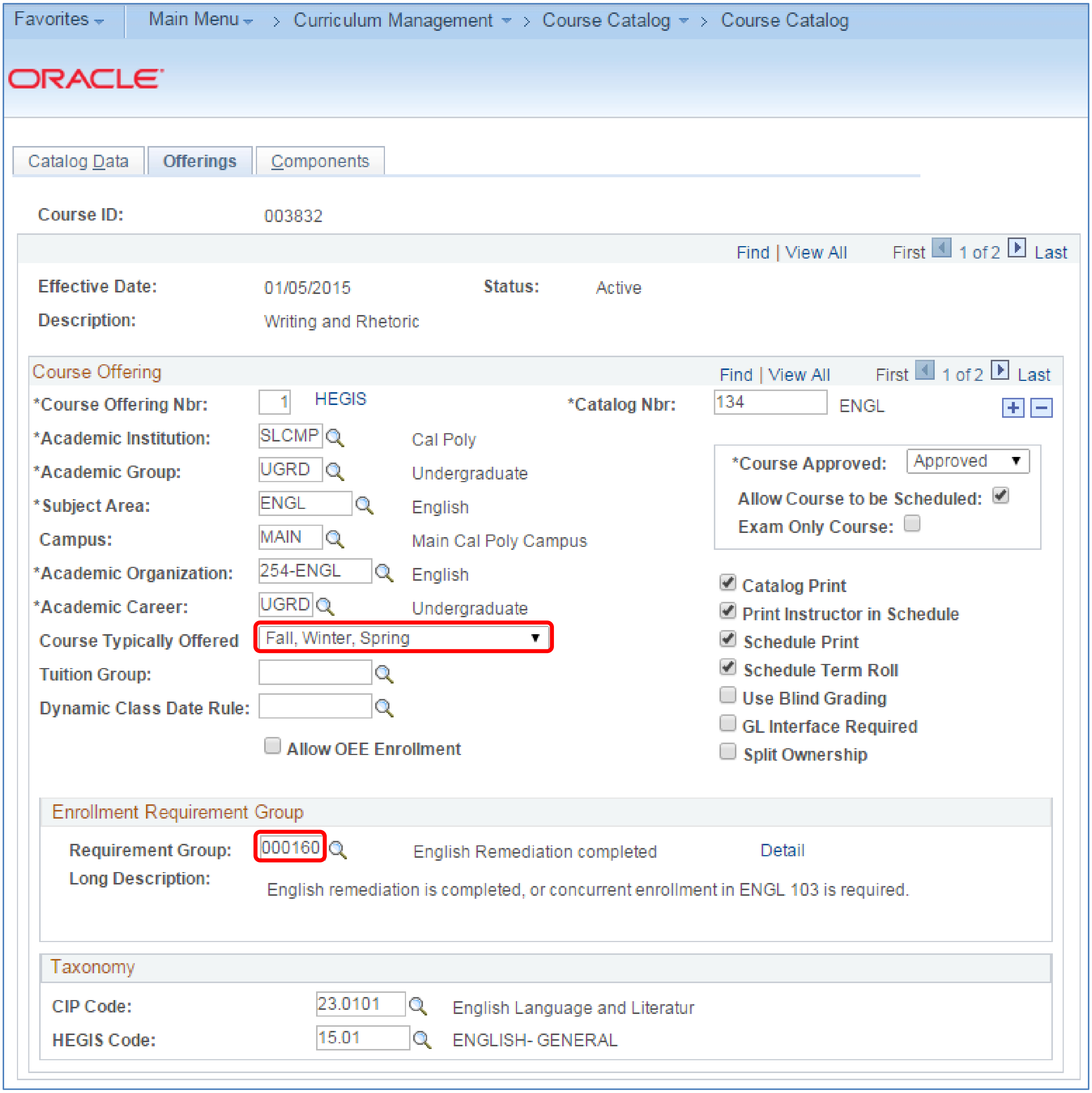
● **Total Completions Allowed:** If the 'Repeat for Credit' box is checked, this will indicate how many times the class may be taken.

● **Course Attributes:** General characteristics that describe the course, including GE and USCP designation, course level and participation in service learning.

● **Course Topics:** Approved special or subtopics that can be scheduled. These are assigned to a course on the 'Basic Data' tab in Maintain Schedule of Classes.

Catalog | Offerings

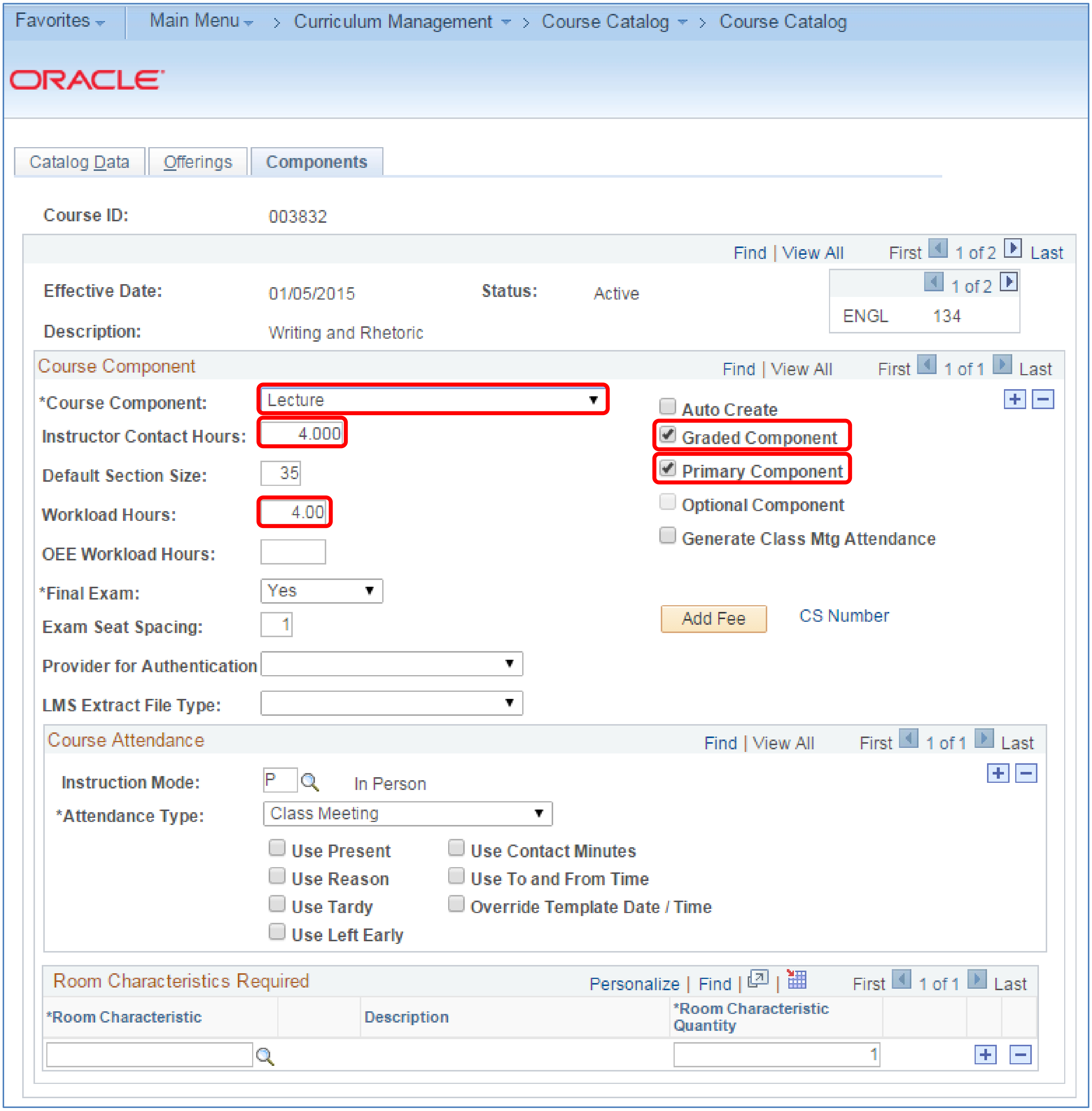
- Identify terms when a course is typically scheduled.
- Identify which requirements are being enforced at the catalog level.



- **Course Typically Offered:** Terms in which a class is typically scheduled.
- **Requirement Group:** Requisites enforced at the catalog level.

Catalog | Components

- Identify required component types, and, if more than one, which is the Primary Component and which is the Graded Component.
- Identify contact hours and workload hours for each component.



● **Course Component:** Based on catalog/curriculum requirements. Classes can contain more than one type (i.e., LEC/LAB).

● **Instructor Contact Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.

- **Workload Hours:** Determined by the Component Type and Unit Value. Find more information about CS Numbers and K-Factors on the UNIVERSITY SCHEDULING website.
- **Graded Component:** Only one component can have a final grade.
- **Primary Component:** Identifies the primary component of the course. This is typically the Enrollment Component.