Life Cycle of the Class Schedule

Planning, Proofing and Reporting

CAL POLY

During Sessions Please...

✓ SILENCE CELLPHONES

✓ SAVE QUESTIONS TO THE END OF THE SESSION

✓ AVOID SIDE CONVERSATIONS

✓ COMPLETE OUR SURVEY

...Thank you!

LEARN BY DOING
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Overview

- Identify the three phases of the academic schedule and learn how are they put into practice.

    1. Planning Phase
    2. Proofing Phase
    3. Reporting Phase

- How university scheduling works in tandem with all departments on campus to create quarterly master schedules.

- Where to access/view scheduling materials online.

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Scheduling Analyst

Office of the Registrar, Catalog, Curriculum and Scheduling

Phases of Academic Scheduling

- Cal Poly is a quarter campus

- The academic schedule is built four times per year: Summer, Fall, Winter and Spring

- A previous "like" term is rolled to create the new term.

- The overall build of the Schedule of Classes takes up to *nine* months, as departments work through Planning, Proofing and Reporting for each term.

- Ensuring accurate information in the Schedule of Classes is imperative.

- Department schedulers work diligently with University Scheduling to ensure the Schedule of Classes is accurate and required changes are submitted in a timely manner.

- A calendar of deadlines is published via the University Scheduling Production calendar.

University Scheduling Production Calendar

SAMPLE

	University Scheduling Production Calendar		2186	2188	2192	2194	2196	2198	2202	2204
			Summer '18	Fall '18	Winter '19	Spring '19	Summer '19	Fall '19	Winter '20	Spring '20
1	Planning Phase:	Data available to Departments	1/17/2018	1/23/2018	5/10/2018	8/23/2018	1/16/2019	1/23/2019	5/15/2019	8/26/2019
2	Planning Phase:	Data entry completed by Depts & email Univ Sched	2/13/2018	2/23/2018	6/19/2018	10/12/2018	2/14/2019	2/21/2019	6/20/2019	10/18/2019
3	TEST PASS Available:	TEST PASS available-Depts check for conflicts	3/14/2018	4/17/2018	9/12/2018	12/3/2018	3/13/2019	4/22/2019	9/11/2019	12/4/2019
4	Proofing Phase:	Data to Departments	3/14/2018	4/17/2018	9/12/2018	12/3/2018	3/13/2019	4/22/2019	9/11/2019	12/4/2019
5	Proofing Phase:	Data returned to University Scheduling	3/23/2018	4/27/2018	9/28/2018	12/17/2018	3/25/2019	4/29/2019	9/25/2019	12/18/2019
6	Schedule Available:	PASS and Schedule of Classes Website	4/16/2018	5/11/2018	10/24/2018	2/7/2019	4/15/2019	5/10/2019	10/23/2019	2/6/2020
7	Registration Begins (R1):	Reg Appointments Begin (CPReg 0-16 units)	4/24/2018	5/18/2018	11/6/2018	2/21/2019	4/24/2019	5/17/2019	11/5/2019	2/20/2020
8	Registration Appts End (R1):	Registration Appointments End	4/30/2018	6/29/2018	11/29/2018	3/8/2019	4/30/2019	6/28/2019	11/21/2019	3/6/2020
9	Registration Begins (R2):	Reg Appointments Begin (CPReg 16-22 units)	NA	8/20/2018	11/30/2018	3/11/2019	NA	8/19/2019	11/22/2019	3/9/2020
10	Registration Appts End (R2):	Registration Appointments End	NA	8/24/2018	12/7/2018	3/15/2019	NA	8/23/2019	12/6/2019	3/13/2020
11	Open Enrollment Begins:	Registration limits increase from 16 to 22 units	5/1/2018	8/25/2018	12/8/2018	3/16/2019	5/1/2019	8/24/2019	12/7/2019	3/14/2020
12	Post Registration:	Email Depts-Review Schedule (cancel no print)	5/2/2018	8/27/2018	12/9/2018	3/18/2019	5/1/2019	8/27/2019	12/10/2019	3/17/2020
13	End of Open Enrollment		6/20/2018	9/19/2018	1/4/2019	3/29/2019	6/21/2019	9/18/2019	1/3/2020	3/27/2020
14		First Day of Classes	6/25/2018	9/20/2018	1/7/2019	4/2/2019	6/24/2019	9/19/2019	1/6/2020	3/30/2020
15		Last Day Add/Drop	7/5/2018	10/1/2018	1/16/2019	4/11/2019	7/3/2019	9/30/2019	1/15/2020	4/9/2020
16	Reporting Phase:	Course information to Departments	7/6/2018	10/2/2018	1/17/2019	4/12/2019	7/5/2019	10/1/2019	1/16/2020	4/10/2020
17	Reporting Phase:	Course information returned to University Scheduling	7/12/2018	10/8/2018	1/24/2019	4/18/2019	7/12/2019	10/8/2019	1/23/2020	4/17/2020
18		Census Date - Last Day PASS Available	8/3/2018	10/10/2018	1/28/2019	4/22/2019	8/2/2019	10/9/2019	1/27/2020	4/20/2020
19		Last Day of Classes	8/31/2018	12/7/2018	3/15/2019	6/7/2019	8/30/2019	12/6/2019	3/13/2020	6/5/2020
20		Final Exam Week	9/4/18 to 9/6/18	12/08/18, 12/10/18 to 12/14/18	3/16/2019, 3/18/19 to 3/22/19	6/8/2019, 6/10/19 to 6/14/2019	9/3/19 to 9/05/19	12/7/19, 12/9/19 to 12/13/19	3/14/20, 3/16/20 to 3/20/20	06/6/20, 06/08/20 to 06/14/20
21		END of TERM	9/6/2018	12/15/2018	3/25/2019	6/15/2019	9/5/2019	12/14/2019	3/23/2020	6/14/2020

*These dates are subject to change. Refer to the Registrar's website for most current registration information and dates.

Update: 9/24/18

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What's Involved in the Planning Phase?
*Designing Phase

- Department Heads/Chairs and Schedulers emailed new term Planning materials.

- Security opens

  - Department Scheduler role has update access in PeopleSoft

- Departments add, delete and update class sections

  - Use approved meeting patterns
  - Follow Campus Administrative Policy (50% in/outside prime time)

- PeopleSoft security closes at 11:59pm on Planning Phase due date

  - Department Scheduler reverts to view only

- Open Lab(s) offered during the Planning Phase

Planning Phase Request Worksheet

SAMPLE

CLASS SCHEDULE
PLANNING PHASE REQUESTS

To: University Scheduling, Office of the Registrar
From:
Department:
Quarter: Choose an item.
Date: Click here to enter a date.

Following is pertinent information to be considered and communicated during the planning phase for the class schedule.

- **Combined Section Information**
- **Reserve Capacity**
- **Medical Requests**
- **Room Preferences**
- **Intentional Conflicts**
- **Sections with Non-Standard Meeting Patterns**   *(Non-Standard patterns are subject to approval)*
- **Additional Considerations**

Subject-Course #-Section Class #	Instructor	Requested Room Capacity	Room Requirements	*Preference: Day/Time or Back-to-Back Meeting Room
Example: IME 141-01 (Class #3456)	Example: Smith, Jayne	Example: 48	Example: Moveable desks – instructor uses group work during course delivery	Example: N/A
Example: STAT 217-01 (Class #5971)	Example: Doe, John	Example: 48	Example: Back to Back in same room as STAT 217-02 (Class # 1234)	Example: Prefer time
Example: STAT 217-02 (Class #8720)	Example: Doe, John	Example: 48	Example: Back to Back in same room as STAT 217-01 (Class # 1235)	Example: Prefer time

Approved Meeting Patterns

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Scheduling Time Patterns

Prime Time = 9 am -3 pm

REMINDER: 50% of scheduled lecture classes should be outside of Prime Time hours

SAMPLE

MWF 3 units (150 min/wk) MW, WF, MF, TR 2 units (100 min/wk)	MW, WF, MF 4 units (220 min/wk)	TR 3 units (160 min/wk)	TR 4 units (220 min/wk)	Any 4 days/wk 4 units (200 min/wk)	5 days/wk 5 units (250 min/wk)
7:10am-8:00am	8:10am-10:00am	7:40am-9:00am	7:10am-9:00am		7:10am-8:00am
8:10am-9:00am	10:10am-12:00pm	8:10am-9:30am	9:10am-11:00am	7:10am-8:00am	8:10am-9:00am
9:10am-10:00am	12:10pm-2:00pm	9:40am-11:00am	University Hour	8:10am-9:00am	9:10am-10:00am
10:10am-11:00am	2:10pm-4:00pm	University Hour	12:10pm-2:00pm	9:10am-10:00am	10:10am-11:00am
11:10am-12:00pm	4:10pm-6:00pm	12:10pm-1:30pm	2:10pm-4:00pm	10:10am-11:00am	University Hour
12:10pm-1:00pm	6:10pm-8:00pm	1:40pm-3:00pm	4:10pm-6:00pm	11:10am-12:00pm	12:10pm-1:00pm
1:10pm-2:00pm	7:10pm-9:00pm	3:10pm-4:30pm	5:10pm-7:00pm	12:10pm-1:00pm	1:10pm-2:00pm
2:10pm-3:00pm	8:10pm-10:00pm	4:10pm-5:30pm	6:10pm-8:00pm	1:10pm-2:00pm	2:10pm-3:00pm
3:10pm-4:00pm		4:40pm-6:00pm	7:10pm-9:00pm	2:10pm-3:00pm	3:10pm-4:00pm
4:10pm-5:00pm		5:10pm-6:30pm	8:10pm-10:00pm	3:10pm-4:00pm	4:10pm-5:00pm
5:10pm-6:00pm		5:40pm-7:00pm		4:10pm-5:00pm	5:10pm-6:00pm
6:10pm-7:00pm		6:10pm-7:30pm		5:10pm-6:00pm	6:10pm-7:00pm
7:10pm-8:00pm		6:40pm-8:00pm		6:10pm-7:00pm	7:10pm-8:00pm
8:10pm-9:00pm		7:10pm-8:30pm		7:10pm-8:00pm	8:10pm-9:00pm
		7:40pm-9:00pm		8:10pm-9:00pm	
		8:10pm-9:30pm			
		8:40pm-10:00pm			

MW 3 units (160 min/wk)

7:40am-9:00am
4:10pm-5:30pm
4:40pm-6:00pm
5:10pm-6:30pm
5:40pm-7:00pm
6:10pm-7:30pm
6:40pm-8:00pm
7:10pm-8:30pm
7:40pm-9:00pm
8:10pm-9:30pm

LABS
Any day/wk
(3 hrs/wk)

8:10am-11:00am
9:10am-12:00pm
University Hour
12:10pm-3:00pm
3:10pm-6:00pm
6:10pm-9:00pm
7:10pm-10:00pm
*Department space only

MW/TR 4 units
STUDIO SCHEDULE*

8:10am-9:30am	3:10pm-4:30pm
9:40am-11:00am	4:40pm-6:00pm
12:10pm-1:30pm	6:10pm-7:30pm
1:40pm-3:00pm	7:40pm-9:00pm

Lecture and Lab taught back to back in **studio** pattern. Select two of the above in consecutive pattern. *Must* be in department controlled space
*Ex. TR 8:10-9:30am (Lect) | TR 9:40-11am (Lab)

11/20/2017

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What's Next?

- University Scheduling thoroughly reviews all data entry

    - If clarification is needed, the department is contacted via email

- Reminder: Classes placed following CAP (50% in/outside prime time)

- After data reviewed, University Scheduling assigns University Lecture Rooms

University Lecture Rooms

UNIVERSITY LECTURE ROOMS

SAMPLE

Bldg -Room	Cap	Board	Type
002 Education			
002 -0013	34†	1C 2W	T
002 -0113	30	2C	T
002 -0203	46	2C	D
002 -0204	46	2C	D
002 -0205	30	2C	D
002 -0212	49†	2C	D
002 -0213**	40	1C	T
003 Business			
*003 -0104	25	1W	T
003 -0111	68†	1W	T
003 -0112	68†	1W	T
003 -0113	46†	1W	T
003 -0114	40†	4W	T
003 -0201	42	1W	T
003 -0204	45	1W	T
003 -0205	45	1W	T
003 -0206	46	1W	T
003 -0209	46	1W	T
003 -0213	230	1C	-
005 Arch & Env Design			
005 -0100	40	1W	D
005 -0104	40	1W	D
005 -0225	48	1W	D
005 -0226	36	1W	D
006 Performing Arts			
006 -0124	180	1W	-
008 Bioresource & Agriculture			
008 -0121	36	1C	D
008 -0123	150†	1W	-

Bldg -Room	Cap	Board	Type
010 Erhart Agriculture			
010 -0111	38	2W	D
010 -0115	38	2W	D
010 -0124	48	1W	T
010 -0125	40	2W	T
010 -0126	48	1W	T
010 -0200	41	2W	N
010 -0201	32	2W	D
010 -0220	58	2C	D
010 -0221 (Map)	45	2C	D
010 -0222	35	2C	D
010 -0223 (Map)	49†	2C	D
010 -0225	43	2C	D
010 -0226	43	2C	D
010 -0227	54	2C	D
010 -0231	56	2C	D
011 Ag Sciences			
011 -0104	46	1C 1W	D
013 Engineering			
013 -0110	40	3C	D
014 Computer Science			
014 -0246	42†	2C	D
014 -0247	35†	2C	D
014 -0249	84†	2C	D
014 -0250	35†	2C	D
014 -0251	35†	2C	D
014 -0252	35†	2C	D
014 -0253	35†	1C 1W	D
020 Engineering East			
020 -0128	40†	2W	D
020 -0129	40†	2C	D
020 -0139	36†	1C 1W	D
020 -0140	44†	2C	D
020 -0143	25†	1W	D
021 Engineering West			
021 -0133	60†	1W	D
021 -0204	24	4W	D
021 -0205	40	4W	D
021 -0235	36	4W	D
021 -0236	24	4W	D
021 -0237	35	4W	D
021 -0238	36	4W	D

Bldg -Room	Cap	Board	Type
022 English			
*022 -0210**	24†	3W	T
022 -0211	36	3W	N
022 -0212	36	3W	D
022 -0218 *	24	2W	D
022 -0219 *	24	1W	N
022 -0220*	24	1W	N
022 -0311*	30	3W	N
022 -0312	30	3W	D
022 -0313	30	3W	D
022 -0314	30	3W	D
022 -0315	39	3W	D
024 Food Processing			
024 -0108	24	1C 1W	N
026 Graphic Arts			
026 -0103A	42	2W	D
026 -0103B	43	2W	D
026 -0104	77	1C	D
026 -0106	48	3C	D
026 -0123**	38	2W	T
033 Fisher Science			
033 -0286	150	1W	-
033 -0287	46	1C	D
033 -0289	24	2W	T
033 -0457	36†	1C 1W	T
034 Dexter			
034 -0227	66	2W	D
034 -0228	40	2W	D
038 Mathematics			
038 -0121	68	1W	T
038 -0201	25	3C	D
038 -0202	35	3C	D
038 -0204	50†	3C	D
038 -0218	35	3C	D
038 -0219	35	3C	D
038 -0220	35	3C	D
038 -0221	35	3C	D
038 -0222	35	3C	D
038 -0225	35	3C	D
038 -0226	35	3C	D
038 -0227	35	3C	D

Bldg -Room	Cap	Board	Type
042 Mott			
042 -0205E**	70†	1W	D
052 Science			
052 -0E03	46	2W	T
052 -0E26	40	2C	T
052 -0E27	102	1W	-
053 Science North			
053 -0201	48	2C	D
053 -0202	48	2C	D
053 -0206	48	2C	D
053 -0213	48	1W	D
053 -0215	70	1C	D
180 Baker Center for Science & Math			
180 -0101	134	1W	-
180 -0102	72	1W	T
180 -0107	60	1W	N
180 -0112	40	1W	T
180 -0113	48	1W	T
180 -0114	96	1W	T
186 Construction Innovations Center			
186 -C100	48	1W	D
186 -C101	40	1W	D
186 -C102	40	1W	D
186 -C103	48	1W	D
186 -C200	48	1W	D
186 -C201	36	1W	D
186 -C202	48	1W	D
186 -C203	48	1W	D
186 -C300	48	1W	D
186 -C301	36	1W	D
186 -C302	48	1W	D
186 -C303	48	1W	D
192 Engineering IV			
192 -0106	133	1W	-
192 -0224	43†	1W	D
192 -0242	36†	1W	D
035 Kennedy Library			
035 -0111B	36 (PC)	1W	T
035 -0216A	24 (Mac)	1W	T
035 -0217C	27 (PC)	1W	T
035 -0217D	26 (PC)	1W	T

PC (Windows) w/DVD	PC (Windows) w/DVD & MAC
Smart Room	Kennedy Computer Labs

Board: Chalkboard Whiteboard   Map: (Map)
Type: T = Tables & Chairs, D = Desk, N = Node Chair
* Swing Rooms   * = Seminar-style
† = Different from SFDB /seat count
**02-213: LS 211 & LS 412 7am-4pm / EDUC 4-10pm
**22-210: Planning priority for PSY/CLA PB/CLA UpperDiv
**26-123: Univ Sched 7am-6pm / Ext Ed 6pm-10pm
**42-205E 7am-5pm only

Revised 8/15/19

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Negotiations: "Not Placed"

- Department contacted if sections cannot be placed

- Options proposed based on room availability

- Department decides to:

    1. Accept the proposed time. University Scheduling will update the Schedule of Classes and ask the department to verify changes.

    2. Evaluate the entire department schedule. If a section *has been placed* and that faculty has flexibility, may choose to swap times, giving the section *that was not placed* the previously assigned room/time and negotiating a different time for the instructor with more flexibility.

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What's Involved in the Proofing Phase?
* Refining Phase

- Department Heads/Chairs and Schedulers emailed new term Proofing materials.

- Email updated Excel file to University Scheduling when done

    - University Scheduling will update PeopleSoft
    - Changes should be minimal
    - If changes required prior to receipt of the Proofing document, they should be emailed to classschedule@calpoly.edu.
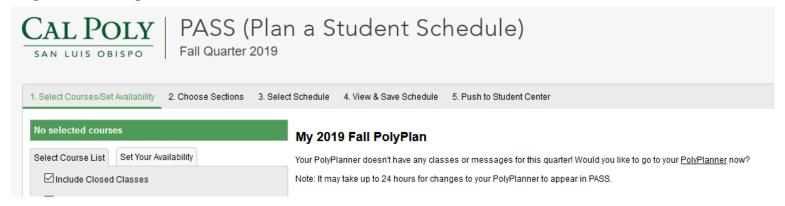
    Reminder: Departments may use either PeopleSoft or Dashboards (Schedule of Classes) to proof their schedule. If using Dashboards keep in mind information is refreshed once nightly.

What's Next?

- Schedule of Classes publishes to PASS (Plan a Student Schedule)

    - After PASS publishes, if changes are necessary (change to class time, day, consent, or notes) the section must be cancelled and a new section created with the updated information.

    - Instructor edits and changes to enrollment cap can be made at any time prior to Census

- Registration begins

What's Involved in the Reporting Phase?
*Final Review

- Department Heads/Chairs and Schedulers emailed new term Reporting materials.

- Department will verify the following:
  - Section enrollment counts accurate based on the regular add/drop deadline
  - Sections with enrollment must have an instructor assigned

- Lastly: Colleges and departments review FAD reports (Faculty Assignments by Department).
  - Distributed by Institutional Research https://ir.calpoly.edu/

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Resources

- Office of the Registrar:

  http://registrar.calpoly.edu

- Campus Administrative Policy

  http://policy.calpoly.edu/cap/200/cap280.htm

- Calendars

  https://registrar.calpoly.edu/Calendars_Deadlines/index.htm

- Final Exam Calendar

  https://registrar.calpoly.edu/Calendars_Deadlines/index.htm/#FE

- Common and Alternate Final

  https://registrar.calpoly.edu/academic-scheduling

- Academic Scheduling Resources

  https://registrar.calpoly.edu/academic-scheduling

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Recap

- Identify the three phases of the academic schedule and learn how are they put into practice.
  1. Planning Phase
  2. Proofing Phase
  3. Reporting Phase

- How university scheduling works in tandem with all departments on campus to create quarterly master schedules.

- Where to access/view scheduling materials online.

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Questions/Contact Info.

- **University Scheduling**

Phone: (805) 756-2461

Email: classschedule@calpoly.edu