## Action Taken

<table>
<thead>
<tr>
<th>Date</th>
<th>Who</th>
<th>Action</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/3/2020</td>
<td>Vicky Myers</td>
<td>Document Created</td>
<td>All</td>
</tr>
</tbody>
</table>
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1 Overview

CourseLeaf Section Scheduler (CLSS) streamlines how colleges and universities determine their class offerings each term; everything from inputting, editing, validating, approving and updating course offerings.

CLSS Terminology

- **Section** – a particular course at a specific time, place and instructor. Sections are also referred to as classes or offerings.

- **Instance** – the term being scheduled. An instance may have multiple sessions (i.e. summer first 5 weeks, second five weeks, 8 weeks and 10 week regular)

- **Scheduling Unit** – group of courses that are scheduled together by the same department

- **Phases** – periods of time during the scheduling process. Rules will determine what and when items can be changed by the department scheduler.

- **Modes** – there are two modes associated with CLSS: Design and Refine Mode.
  - **Design mode**, all changes to the schedule are held for a scheduling unit and validated at one time by clicking the Validate button. Data only lives in CLSS.
  - **Refine mode**, changes to sections are validated and sent through workflow when each section is saved. Data transfers to PSoft.
2 Getting Started

Navigate to: (URL will be provided after training sessions)

- Click on the instance you wish you schedule

CourseLeaf/CLSS – Instances

Welcome to CourseLeaf CLSS, where you will have direct access to manage your class schedule.

- See the Phase – Phases are set by University Scheduling at set times

CourseLeaf/CLSS – Fall Quarter 2020 – Plan Phase

69 Scheduling Units
1,866 Courses 7,714 Sections

- Double click on Scheduling Unit
- Scheduling unit screen provides a list of all courses and sections assigned to a scheduling unit, or department, and used to add, edit and remove sections from a course.

Legend:

- **View By**: view sections by course, instructor, or day and time
- **Expand All Arrows**: view all sections
- **Collapse All Arrows**: hide all sections
- **Plus Button**: add section
- **X Button**: delete section

Cross-listed sections will be indicated with a See or Also indicator to the far right of the section.

Linked sections are indicated by a vertical line connecting parent sections to child sections.

Multiple instructors will list the primary instructor + a number indicating the additional instructors for that section.

- “View By” default setting is by Course
- Select “Expand All” arrows to view all sections

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections

Plan Phase Refine Mode

ENGL 131 – Writing and Rhetoric Stretch (Part I)

○ 01 LEC Gardner, Tyler (017353942) +1 MTWR 1:10pm-2pm

ENGL 132 – Writing and Rhetoric Stretch (Part II)

○ 01 LEC Starkey, Glen (000007302) MW 12:10pm-2pm

ENGL 133 – Writing and Rhetoric for Multilingual Students

○ 01 LEC Peters, Jason (012100560) MW 10:10am-12pm

○ 02 LEC Peters, Jason (012100560) MW 12:10pm-2pm

○ 03 LEC Ferree, Scott (013607850) TWR 9:10am-10am

○ 04 LEC Ferree, Scott (013607850) Does Not Meet

ENGL 134 – Writing and Rhetoric

○ 01 LEC Bates, Jennifer (001837937) Does Not Meet

○ 02 LEC Ashley, Jennifer (000157932) MW 12:10pm-2pm

○ 03 LEC Brogno, Courteney (000125836) Does Not Meet

○ 04 LEC Brogno, Courteney (000125836) Does Not Meet

○ 05 LEC Bartet, Jonathan (004110374) Does Not Meet

○ 06 LEC St. John, Leslie (000403857) MW 2:10pm-4pm

○ 07 LEC Brogno, Courteney (000125836) Does Not Meet

○ 08 LEC Walters, William (000007679) TWR 10:10am-11am

○ 09 LEC Staff Does Not Meet

○ 10 LEC Martin-Elston, Erin (000010929) TWR 8:10am-9am

- Select “Collapse All” arrows to hide all sections

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections

Plan Phase Refine Mode

ENGL 131 – Writing and Rhetoric Stretch (Part I)

ENGL 132 – Writing and Rhetoric Stretch (Part II)

ENGL 133 – Writing and Rhetoric for Multilingual Students

ENGL 134 – Writing and Rhetoric

ENGL 135 – Writing and Rhetoric Tutorial

ENGL 145 – Reasoning, Argumentation, and Writing

ENGL 148 – Reasoning, Argumentation and Professional Writing

ENGL 149 – Technical Writing for Engineers

ENGL 150 – Writing Tutorial
- To view schedule by instructor, click on “View By” and select Instructor

- To view schedule by Day and Time, Click on “View By” and select Day and Time
### Monday
- **ENGL 145-08** – Reasoning, Argumentation, and Writing | LEC | Roberts, Mark | MTWR 8:10am-9am
- **ENGL 205-01** – Sequence III: Mid-Seventeenth to Late Eighteenth Century | LEC | Starkey, Glen | MWF 8:10am-9am; T 10:10am-11:25am
- **ENGL 231-01** – British Literature: 1789 to the Present | LEC | Staff | MTWF 8:10am-9am

### Tuesday
- **ENGL 134-10** – Writing and Rhetoric | LEC | Martin-Elston, Erin | TWRF 8:10am-9am
- **ENGL 145-08** – Reasoning, Argumentation, and Writing | LEC | Roberts, Mark | MTWR 8:10am-9am
- **ENGL 231-01** – British Literature: 1789 to the Present | LEC | Staff | MTWF 8:10am-9am

### Wednesday
- **ENGL 134-10** – Writing and Rhetoric | LEC | Martin-Elston, Erin | TWRF 8:10am-9am
- **ENGL 145-08** – Reasoning, Argumentation, and Writing | LEC | Roberts, Mark | MTWR 8:10am-9am
- **ENGL 205-01** – Sequence III: Mid-Seventeenth to Late Eighteenth Century | LEC | Starkey, Glen | MWF 8:10am-9am; T 10:10am-11:25am
- **ENGL 231-01** – British Literature: 1789 to the Present | LEC | Staff | MTWF 8:10am-9am

### Thursday
- **ENGL 134-10** – Writing and Rhetoric | LEC | Martin-Elston, Erin | TWRF 8:10am-9am
- **ENGL 145-08** – Reasoning, Argumentation, and Writing | LEC | Roberts, Mark | MTWR 8:10am-9am
- **ENGL 253-01** – Introduction to Romanticist through Modernism | LEC | Preston, Alison | MTWR 8:10am-9am

### Friday
- **ENGL 133-04** – Writing and Rhetoric for Multilingual Students | LEC | Ferree, Scott | Does Not Meet
- **ENGL 134-01** – Writing and Rhetoric | LEC | Bates, Jennifer | Does Not Meet
- **ENGL 134-03** – Writing and Rhetoric | LEC | Brogno, Courtney | Does Not Meet

### Does Not Meet
- **ENGL 133-04** – Writing and Rhetoric for Multilingual Students | LEC | Ferree, Scott | Does Not Meet
- **ENGL 134-01** – Writing and Rhetoric | LEC | Bates, Jennifer | Does Not Meet
- **ENGL 134-03** – Writing and Rhetoric | LEC | Brogno, Courtney | Does Not Meet

Arrows will expand or collapse all days of the week

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S:\University Scheduling\Course Leaf CLSS

9/23/2020
3 Creating Your Schedule

- Adding/Editing

  - Double click course offering to view/edit

  - To add a section, click on the plus icon

  - Section # - will auto-populate in chronological order
  - Component – defaults to Lecture
  - Enrollment – enter Maximum and Rm Cap Request
  - Instructor – enter instructor on record or leave as staff
  - Schedule – select Does Not Meet to add a day/time or leave as is for TBA
  - Notes – add if applicable
  - Room – select from drop down or use search field to find
  - Schedule Print – Yes or No to publish to Schedule of Classes
- Meeting Pattern is changed from *Does Not Meet* to a Standard Meeting Pattern using the Snapper

- Click on "*Does Not Meet*
- Click on Patterns drop down menu to view Standard Meeting Patterns
- The section will be highlighted in green when meeting pattern is selected.

- Choose the meeting pattern that works and click on “Accept” to SAVE.
- Click on pencil to Edit Instructor on Record

- Use Search to type in name or scroll
- Use Plus Icon to add additional instructors

- Select Trash Can icon to remove instructor

- Adjust workload percentage as needed

- Select “Accept” to SAVE
- Multiple instructors will appear as +1 (+2, +3, etc.)

- Double click on the section to view multiple instructors on record

- Class notes – click on pencil to edit

- Select Plus Icon

- Use Search or scroll to add pre-defined class note

<table>
<thead>
<tr>
<th>Course</th>
<th>Instructor</th>
<th>Days</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENGL 131 – Writing and Rhetoric Stretch (Part I)</td>
<td>Gardner, Tyler</td>
<td>MTWR</td>
<td>1:10pm-2pm</td>
</tr>
<tr>
<td></td>
<td>Starkey, Glen</td>
<td>TR</td>
<td>4:10pm-6pm</td>
</tr>
</tbody>
</table>
Select “Add Your Own Note” to add Free Format note*

*Free Format notes – notify University Scheduling if you have a free format note that needs to be pre-defined.

Click on “Accept” to SAVE
- Review fields before clicking on "Save Section"

- Section has been successfully added

- Adding a new course to the schedule

  - Show courses with no sections
  - Select "Show courses with no sections" upper right hand corner
Left side column is *before* selecting “Show courses with no sections”

Right side column is *after* selecting “Show courses with no sections:

- **New course will appear as follows when view is expanded**

  - HIST 111 – Western Civilization: Reformation to the Present

- **Select the Plus icon to add new course**
- Delete offering by clicking on the red x next to section

- View of a cross-listed course

- HNRS 143-71 is cross-listed with MATH 143-71
- Click on MATH 143-71 to view combined section
“Also” are (child) sections added to primary section

- MATH 143-71 is cross-listed with HNRS 143-71
- Click on HNRS 143-71 to view combined section
• Adding Related Components such as lecture/laboratory

  ▪ Select the “Add” Icon to add a new section

  ![Create Section – CHEM 439: Instrumental Analysis](image)

  ▪ Section # - will auto-populate in chronological order
  ▪ Component – defaults to Lecture
  ▪ Enrollment – enter Maximum and Rm Cap Request
  ▪ Instructor – enter instructor on record or leave as staff
  ▪ Schedule – select *Does Not Meet* to add a day/time or leave as is for TBA
  ▪ Notes – add if applicable
  ▪ Room – select from drop down or use search field to find
  ▪ Units – as with PSoft, units shown is for both components. i.e. 5 Units = 3 unit lecture + 2 unit lab
  ▪ Schedule Print – Yes or No to publish to Schedule of Classes
- Snapper – use pre-defined “Patterns” or “User Defined” and type in MWF 11:10am-12pm, select “Add”

Click on “Accept” when meeting pattern is selected.
- Review new section and if no changes needed, click on “Save Section”

- Select Plus Icon to add related component
- **Section #** - will auto-populate in chronological order
- **Component** – defaults to Lecture, select Laboratory
- **Enrollment** – enter Maximum and Rm Cap Request
- **Instructor** – enter instructor on record or leave as staff
- **Schedule** – select “Does Not Meet” to add a day/time or leave as is for TBA
- **Notes** – add if applicable
- **Room** – select from drop down or use search field to find
- **Units** – as with PSoft, units shown is for both components.
  i.e. 5 Units = 3 unit lecture + 2 unit lab
- **Schedule Print** – Yes or No to publish to Schedule of Classes

- Meeting pattern is changed by clicking on “Does Not Meet”
• Click on “Accept” once meeting pattern is finalized
“Link To”

- Any enrollment section

Any enrollment section

- CHEM 439-04 would be one to one relationship
- Any enrollment section would be “9999”

Review all fields and click on “Save Section”

One to one relationships are seen with a related line between lecture and lab
4 Validate

- In Design Mode, when finished scheduling, click “Validate”

CLSS Rule Error Messages
- **Error** - An Error indicates that the section or scheduling unit may not be saved as is. The error description will give the rationale and possible solutions to the error. To save the section, correct the error then attempt to save again.

- **Warning** - A Warning indicates that the section or scheduling unit may be saved, but caution should be taken before completing the schedule. The warning description will give the rationale and may list possible issues that may arise from this section. The Save As-Is Button will appear if the validation only required a warning and not a workflow or error. Warnings do not require any further workflow or approval to be saved.

- **Workflow** - Workflow indicates that the section or scheduling unit may be saved as is but approval will be required to complete entry of the schedule into PSoft. The workflow description will give the rationale. The Start Workflow button will appear when validating a scheduling unit as a whole in Design Mode. When saving a section in Design Mode the workflow indicator will show, but the Save As-Is button will display. In Design mode all workflow takes place at one time for the entire scheduling unit. In Refine Mode when the section is saved the Start Workflow button will appear and the section must be sent through workflow on its own.
• Correct Errors

![Image](https://via.placeholder.com/156x657)

- Enrollment Cap must be < or = Requested Room Cap
- Enrollment Cap must be < or = the Requested Room Cap

- **Enrollment Cap < or = Requested Room Cap**

- **Found 1 Section**

<table>
<thead>
<tr>
<th>Section</th>
<th>Campus</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMS 101-05 LEC</td>
<td>MAIN@SLO</td>
<td>MW 8:10am-10am</td>
</tr>
<tr>
<td>Public Speaking</td>
<td>Patrick Frisco</td>
<td></td>
</tr>
</tbody>
</table>

- Select icon to be directed to the section that needs to be corrected before being able to proceed with workflow.

- **COMS 101 - Public Speaking**

- Double click on section

- **Enrollment**

<table>
<thead>
<tr>
<th>Maximum</th>
<th>Wait Cap</th>
<th>Rm Cap Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>48</td>
<td>99</td>
<td>24</td>
</tr>
</tbody>
</table>

- **Error: Enrollment cap is 48; Room Cap Request is 24**

- **Enrollment**

<table>
<thead>
<tr>
<th>Maximum</th>
<th>Wait Cap</th>
<th>Rm Cap Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>99</td>
<td>24</td>
</tr>
</tbody>
</table>

- Enrollment/Room Caps are amended as needed; click on Save Section when completed.

- Note: If receiving error about shared space, you should 1) modify the facility the class is assigned to or 2) notify University Scheduling so a “share” may be created.

![Image](https://via.placeholder.com/156x657)
- Warnings and Workflow validation messages will allow the scheduler to proceed with selecting Start Workflow

- Once the scheduler “Validates” in Design Mode, the system will automatically turn to Refine Mode.
## Approved Meeting Patterns

### Prime Time Scheduling percentages*

- 7:10am-12pm – 35%
- 12:10pm-2pm – 20%
- 2:10pm-4pm – 20%
- 4:10pm-10pm – 15%

* 90% of lecture, seminar, and discussion sections are scheduled in University space between the hours of 8am-6pm. Departments are asked to follow the above scheduling breakdown in order to maximize use of University Lecture space.

A warning will be received if deviating from these percentages.
### 6 Glossary

- **Child** section – a section added to an existing “parent” section becomes the child and inherits the meeting pattern, e-caps, instructor on record; appears as “See” section on combined sections. *i.e. See HNRS 145-70*
- **CLSS** – CourseLeaf Section Scheduler – Plan, edit, validate and publish class schedule.
- **Course Code** – the subject code and number that uniquely identifies a course.
- **Cross-referenced/Cross-Listed Course** – are shared by two or more scheduling units; have identical course elements (number, title, description, units, mode of instruction, prerequisites) except the course prefix which reflects the academic department or program.
- **Design Mode** – all changes to the schedule are held for a scheduling unit and validated at one time by clicking the Validate button.
- **Framer** – a view of sections by Instance. Historical data can be viewed in three formats.
- **Hard Refresh** – Performing a hard refresh completely clears your web browser cache and loads the web page from the server. *Windows: CTRL + F5 Apple/MAC: COMMAND + R*
- **Heat Map** – a visual representation of the number of sections in a scheduled week.
- **Instance** – the term being scheduled. An Instance can have multiple sessions (i.e. 5W1, 5W2, 8W and 10W/regular).
- **Modes** – How CLSS processes requests.
- **Parent** section – changes to pattern, e-caps, and instructor on record; appears as “Also” section on combined sections. *i.e. Also HNRS 145-70*
- **Phases** – periods of time where changes are based on security (Plan, Proof, Print, Archive).
- **Prime Time** – distribution of lecture, seminar and discussion sections between 9am-3pm
- **Refine Mode** – changes to sections are validated and sent through workflow when each section is saved.
- **Rules** – are used by CLSS to determine whether sections or scheduling units meet certain criteria set by the Office of the Registrar.
- **Scheduling Unit** – group of courses that are scheduled together by the same department.
- **Section** – a section is the most granular scheduling item; a particular course at a specific meeting pattern and instructor.
- **SIS** – Student Information System.
- **Snapper** – shows the section being scheduled and related sections. The Snapper will attempt to “snap” the section into a pre-defined, standard meeting pattern. Default view is all sections of the same course but other courses of interest can be added.
- **Workflow** – a standardized sequence of steps that may follow for approval.
Resources/Bibliography:

CLSS LilyPad University offers step by step instructions with video tutorials. Click on in the upper right hand corner.