CLSS Training Guide

CourseLeaf Section Scheduler (CLSS)

Business Process Guide

Cal Poly State University

San Luis Obispo, CA 93407

Action Taken

Date	Who	Action	Pages
9/3/2020	Vicky Myers	Document Created	All
10/5/2020	Vicky Myers	Framer & Visualize added	All

Table of Contents

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**

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

- **Double click on Scheduling Unit**

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

CourseLeaf/CLSS – Fall Quarter 2020 – Aerospace Engineering

admin2   Log Out

23 Courses, 106 Sections

Plan Phase   Design Mode

View By ▾   ✓ Validate   ✗ Bridge Tools   ☰ Visualize   ▼ Filter   ▥ Framer   Export ▾

✓ Course
Instructor
Day and Time

☐ Show courses with no sections

Hello Cal Poly SLO CLSS Team, welcome to your CLSS site! For more information on how to use [...] mphasize text, navigate to this site: https://github.com/adam-p/markdown-here/wiki/Markdown-Cheatsheet

user1 (Art)
user2 (Biological Sciences)
user3 (English)

Currently pointing to: STG Environment

AERO 121 – Aerospace Fundamentals

	01	LEC	Abercromby, Kira (004613774)	M 2:10pm-3pm
	02	LAB	Lehmann, Jared	T 8:10am-11am
	03	LAB	Prakash, Deeksha	T 12:10pm-3pm
	04	LAB	King, Jacob-Michael	T 3:10pm-6pm
	05	LAB	Diamantopoulos, Stavro...	R 8:10am-11am
	06	LAB	Prakash, Deeksha	R 12:10pm-3pm
	07	LAB	Ochoa, Andrew	R 3:10pm-6pm

AERO 200 – Special Problems for Undergraduates

| | 01 | IND | Marshall, David | Does Not Meet |
| | 02 | IND | Abercromby, Kira | Does Not Meet |

- **"View By" default value is "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

- **Select "Expand All" arrows to view all sections**

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections

Plan Phase   Refine Mode

Expand All

- **Select "Collapse All" arrows to hide all sections**

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections

Plan Phase   Refine Mode

Collapse All

> **ENGL 131 – Writing and Rhetoric Stretch (Part I)**   ⊕

| ○ | 01 | LEC | Gardner, Tyler (▓▓▓▓ +1 | MTWR 1:10pm-2pm |

ENGL 132 – Writing and Rhetoric Stretch (Part II)   ⊕

| ○ | 01 | LEC | Starkey, Glen (▓▓▓ | MW 12:10pm-2pm |

ENGL 133 – Writing and Rhetoric for Multilingual Students   ⊕

○	01	LEC	Peters, Jason ▓▓▓▓	MW 10:10am-12pm
○	02	LEC	Peters, Jason ▓▓▓▓	MW 12:10pm-2pm
○	03	LEC	Ferree, Scott ▓▓▓▓	TWRF 9:10am-10am
○	04	LEC	Ferree, Scott (0▓▓▓▓)	Does Not Meet

ENGL 134 – Writing and Rhetoric   ⊕

○	01	LEC	Bates, Jennifer ▓▓▓▓	Does Not Meet
○	02	LEC	Ashley, Jennifer (▓▓▓▓▓	MW 12:10pm-2pm
○	03	LEC	Brogno, Courtney ▓▓▓▓	Does Not Meet
○	04	LEC	Brogno, Courtney ▓▓▓▓	Does Not Meet
○	05	LEC	Bartel, Jonathan (▓▓▓▓	Does Not Meet
○	06	LEC	St. John, Leslie ▓▓▓▓	MW 2:10pm-4pm
○	07	LEC	Brogno, Courtney ▓▓▓▓	Does Not Meet
○	08	LEC	Walters, William (▓▓▓▓	TWRF 10:10am-11am
○	09	LEC	Staff	Does Not Meet
○	10	LEC	Martin-Elston, Erin (▓▓▓▓	TWRF 8:10am-9am

> **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**

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections
Plan Phase   Refine Mode

View By ▾   ☑ Validate

Course
✓ Instructor

Hello Cal Poly SLO CLSS Team, welcome to your CLSS site! For more information on how to use

❯ Allen, Regulus (0

Ashley, Jennifer (

Bartel, Jonathan

Bates, Brian (012

Bates, Jennifer ((

Battenburg, Johr

Bolyard, Elizabet

- **To view schedule by Day and Time, Click on "View By" and select Day and Time**

CourseLeaf/CLSS – Fall Quarter 2020 – English

66 Courses, 188 Sections
Plan Phase   Refine Mode

View By ▾   ☑ Validate

Course
Instructor
✓ Day and Time

Hello Cal Poly SLO CLSS Team, welcome to your CLSS site! For more information on how to use
p/markdown-here/wiki/Markdown-Cheatsheet

❯ Monday

Tuesday

Wednesday

Thursday

Friday

Does Not Meet

Monday

○	ENGL 145-08 – Reasoning, Argumentation, and Writing	LEC	Roberts, Mar▮▮▮▮▮▮	MTWR 8:10am-9am
○	ENGL 205-01 – Sequence III: Mid-Seventeenth to Late Ei...	LEC	Starkey, Glen▮▮▮▮	MWF 8:10am-9am; T 10:10am-11:...
○	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 Ei...	LEC	Starkey, Glen ▮▮▮▮▮▮	MWF 8:10am-9am; T 10:10am-11:...
○	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 Mo...	LEC	Preston, Alison (▮▮▮▮	MTWR 8:10am-9am

Friday

Does Not Meet

○	ENGL 133-04 – Writing and Rhetoric for Multilingual Stu...	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 Stu...	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

3 Creating Your Schedule

- **Adding and Editing**

  > **ENGL 131 – Writing and Rhetoric Stretch (Part I)**

  Double click on course to view/edit

  > **ENGL 131 – Writing and Rhetoric Stretch (Part I)**

  ⊗   01   LEC   Gardner, Tyler (▓▓▓▓▓▓) +1   MTWR 1:10pm-2pm   ➕

  To add a section, click on the plus icon

Create Section – ENGL 131: Writing and Rhetoric Stretch (Part I)

Section Information

Title/Topic	Writing and Rhetoric Stretch (Part I) (Defa▾	Session	Regular Academic Session (9/14/20 to 11▾
Section #	02	Campus	Main Cal Poly Campus (Cal Poly-San Luis ▾
Units	4	Inst. Method	In Person ▾
Status	Active ▾	Schedule Print	Yes ▾
Consent	No Special Consent Required ▾	Component	Lecture ▾
Grade Mode	Credit / No Credit ▾	Final Exam	(No Option Selected) ▾
Link To	Not linked to other sections ▾	Combined With	Select section... ▾

Section Attributes ✏

None Selected

Course Attributes

Course Level: Lower Division
State Support: State Support

Instructor ✏

Staff

Room

No Room Assigned ▾

Schedule

📅 **Does Not Meet**

Enrollment   0 current

Maximum	Wait Cap	Rm Cap Request
	99	

Notes

None Assigned

- **Section # - will auto-populate in chronological order**
- **Component – defaults to primary component**
- **Enrollment – enter Maximum and Rm Cap Request**
- **Instructor – enter instructor on record or select staff**
- **Schedule – select *Does Not Meet* to add a day/time**
- **Notes – add if applicable**
- **Room – select from drop down or use search field to find**
- **Schedule Print – No or Yes to publish to Schedule of Classes**

- **Meeting Pattern is changed from *Does Not Meet* to a Standard Meeting Pattern using the "Snapper"**

Create Section – ENGL 131: Writing and Rhetoric Stretch (Part I)

Section Information

Title/Topic	Writing and Rhetoric Stretch (Part I) (Defa⌄	Session	Regular Academic Session (9/14/20 to 11⌄
Section #	02	Campus	Main Cal Poly Campus (Cal Poly-San Luis⌄
Units	4	Inst. Method	In Person ⌄
Status	Active ⌄	Schedule Print	Yes ⌄
Consent	No Special Consent Required ⌄	Component	Lecture ⌄
Grade Mode	Credit / No Credit ⌄	Final Exam	(No Option Selected) ⌄
Link To	Not linked to other sections ⌄	Combined With	Select section... ⌄

Section Attributes ✏

None Selected

Course Attributes

Course Level: Lower Division
State Support: State Support

Instructor ✏

Staff

Room

No Room Assigned ⌄

Schedule

📅 **Does Not Meet**

Enrollment　　　　　　　　　　0 current

Maximum	Wait Cap	Rm Cap Request
24	99	24

Notes

None Assigned

Click on "*Does Not Meet*" and again on "Patterns" drop down menu to view Standard Meeting Patterns

Patterns ▼　ENGL 131-02 LEC　LEC 01

- ✓ MP - 4 Unit MF
- MP - 4 Unit MF2
- MP - 4 Unit MTRF
- MP - 4 Unit MTWF
- MP - 4 Unit MTWR
- MP - 4 Unit MW
- MP - 4 Unit MW2
- MP - 4 Unit MWRF
- MP - 4 Unit TR
- MP - 4 Unit TR2
- MP - 4 Unit TWRF
- **MP - 4 Unit WF**
- MP - 4 Unit WF2
- User Defined

Meeting Pattern Name　　　　　Add

The section will be highlighted in green when meeting pattern is selected

Choose the desired meeting pattern and click on "Accept" to SAVE

- **Click on pencil to edit Instructor on Record**

Use Search to type in name or scroll list

Select 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.)**

> **ENGL 131 – Writing and Rhetoric Stretch (Part I)**

| | 01 | LEC | Gardner, Tyler (▮▮▮▮ +1 | MTWR 1:10pm-2pm |
| | 02 | LEC | Starkey, Glen (▮▮▮▮) +1 | TR 4:10pm-6pm |

Double click on the section to view multiple instructors on record

- **Class notes – click on pencil to edit**

Notes ✏

None Assigned

Select Plus Icon ➕

Notes ❓ ✕

| Note | ➕ |
| *None Assigned* | |

Use Search or scroll to add pre-defined class note

Notes

Search: [ ]

Add Your Own Note

0005 - Contact instructor for consent.
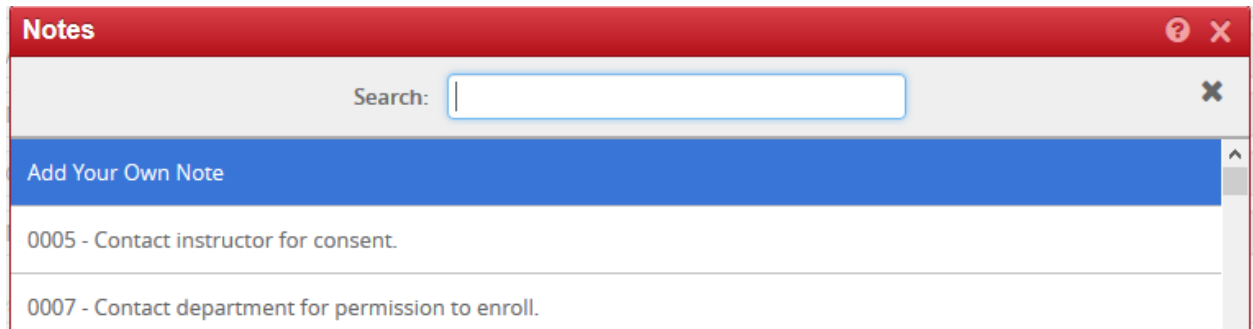
0007 - Contact department for permission to enroll.

0013 - Contact instructor by email for consent.

0015 - Freshmen and Sophomores only.
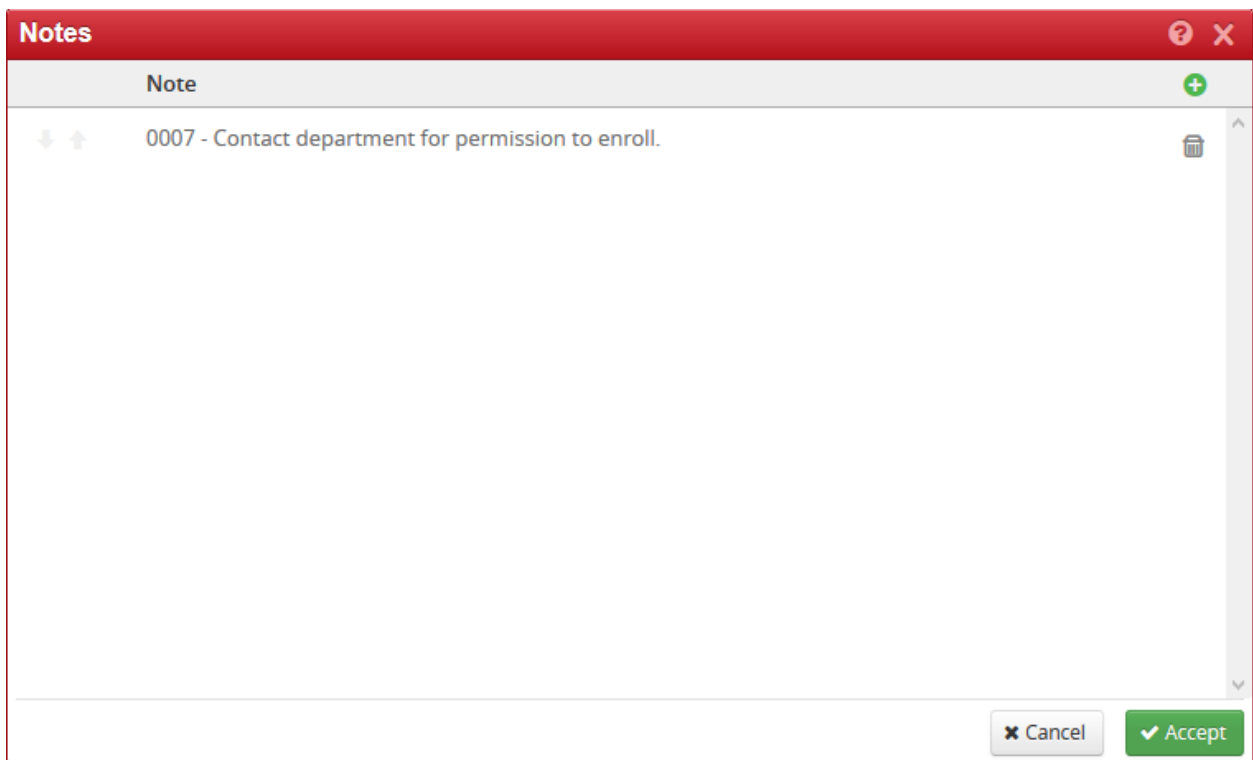
0016 - Sophomore-level not for freshman.

Select "Add Your Own Note" to add Free Format* note

Notes   ❓ ✕

Search: [   ]   ✖

Add Your Own Note

0005 - Contact instructor for consent.

0007 - Contact department for permission to enroll.

Click on "Accept" to SAVE

Notes   ❓ ✕

Note   ➕

↓ ↑   0007 - Contact department for permission to enroll.   🗑

                                              ✖ Cancel   ✔ Accept

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

Review fields before clicking on "Save Section"

Create Section – ENGL 131: Writing and Rhetoric Stretch (Part I)

Section Information

Title/Topic	Writing and Rhetoric Stretch (Part I) (Defa⌄	Session	Regular Academic Session (9/14/20 to 11⌄
Section #	02	Campus	Main Cal Poly Campus (Cal Poly-San Luis⌄
Units	4	Inst. Method	In Person ⌄
Status	Active ⌄	Schedule Print	Yes ⌄
Consent	No Special Consent Required ⌄	Component	Lecture ⌄
Grade Mode	Credit / No Credit ⌄	Final Exam	(No Option Selected) ⌄
Link To	Not linked to other sections ⌄	Combined With	Select section... ⌄

Section Attributes   ✎

None Selected

Course Attributes

Course Level: Lower Division
State Support: State Support

Instructor   ✎

Starkey, Glen
Stegner, Nicole (

Room

No Room Assigned ⌄

Schedule

📅 TR 4:10pm-6pm ✕

Enrollment   0 current

Maximum	Wait Cap	Rm Cap Request
24	99	24

Notes   ✎

1. 0007 - Contact department for permission to enroll.

Comments

⚒ Bridge Tools   ✕ Cancel   ✔ Save Section

Section has been successfully added

ENGL 131 – Writing and Rhetoric Stretch (Part I)

○	01	LEC	Gardner, Tyler ( ) +1	MTWR 1:10pm-2pm
○	02	LEC	Starkey, Glen ( ) +1	TR 4:10pm-6pm

- **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:

❯ HIST 100 – Introduction to the Study of History	**❯ HIST 2IP – Study Abroad**
HIST 110 – Western Civilization: Ancient to Renaissance	HIST 4IP – Study Abroad
HIST 200 – Special Problems for Undergraduates	HIST 100 – Introduction to the Study of History
HIST 201 – United States History to 1865	HIST 110 – Western Civilization: Ancient to Renaissan
HIST 202 – United States History Since 1865	HIST 111 – Western Civilization: Reformation to the P
HIST 206 – American Cultures	HIST 200 – Special Problems for Undergraduates
HIST 210 – World History I	HIST 201 – United States History to 1865
HIST 213 – Modern Political Economy	HIST 202 – United States History Since 1865
HIST 216 – Comparative Social Movements	HIST 206 – American Cultures
HIST 222 – World History, 1000 - 1800	HIST 207 – Freedom and Equality in American History
HIST 223 – World History, 1800 - Present	HIST 208 – Survey of California History
HIST 225 – The World at War	HIST 210 – World History I
HIST 303 – Research and Writing Seminar in History	HIST 213 – Modern Political Economy
HIST 304 – Historiography	HIST 216 – Comparative Social Movements
HIST 306 – The Witch-Hunts in Europe, 1400-1800	HIST 221 – World History, Beginnings to 1000
HIST 313 – Modern Middle East	HIST 222 – World History, 1000 - 1800
HIST 316 – Modern East Asia	HIST 223 – World History, 1800 - Present
	HIST 225 – The World at War

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 to the left of the section**

ENGL 131 – Writing and Rhetoric Stretch (Part I)

❌	01	LEC	Gardner, Tyler (▓▓▓▓) +1	MTWR 1:10pm-2pm
Delete	~~02~~	LEC	Starkey, Glen (▓▓▓▓) +1	TR 4:10pm-6pm

- **View of a cross-listed course**

"See" **is the primary section (parent) – changes to pattern, e-caps, instructor**

- **Primary, or parent section, cannot be deleted from the child section**

- **The section added to the schedule first is the primary section**

- **Click on MATH 143-71 to view combined section**

"Also" are (child) sections added to primary, or parent section

Edit Section – MATH 143-70: Calculus III (Class No.: 1706; CLSS ID: 3710)

HNRS 143-70 controls the primary scheduling configuration for this Combined section

Section Information

Title/Topic	Calculus III (Default Value)	Session	Regular Academic Session (9/14/20 to 11
Section #	70	Campus	Main Cal Poly Campus (Cal Poly-San Luis
Units	4	Inst. Method	Synchronous Mode
Status	Active	Schedule Print	No
Consent	Department Consent Required	Component	Lecture
Grade Mode	Student Option	Final Exam	(No Option Selected)
Link To	Not linked to other sections	Combined With	HNRS 143-70 ✖ ←

Section Attributes ✏

Course Level: Lower Division
GE Area B: 2019-20 or earlier catalog: GE Area B1
GE Area B: 2020-21 or later catalog: GE Area B4

Course Attributes

Course Level: Lower Division
GE Area B: 2019-20 or earlier catalog: GE Area B1
GE Area B: 2020-21 or later catalog: GE Area B4

Instructor ✏

Brussel, Eric (███████)

Room

Virtual Class (0)

Schedule

📅 MTRF 9:10am-10am ✖

Enrollment   32 current

Maximum	Wait Cap	Rm Cap Request
35	99	35

Combined Enrollment

Maximum	Wait Cap	Rm Cap Request
35	99	35

- **MATH 143-71 is cross-listed with HNRS 143-71**

- **"Also" or child section, can be deleted from the parent**

- **Click on HNRS 143-71 to view combined section**

- **The section combined to an existing section, is the child**

- **Adding Related Components such as lecture/laboratory**

> CHEM 439 – Instrumental Analysis   ➕

    01   LEC   Staff   MWF 12:10pm-1pm; TR 8:10am-1... | Add |

         02   LAB   Staff   TR 8:10am-11am

- **Select the "Add" Icon to add a new section**

Create Section – CHEM 439: Instrumental Analysis

Section Information

Title/Topic	Instrumental Analysis (Default Value)	Session	Regular Academic Session (9/14/20 to 11)
Section #	04	Campus	Main Cal Poly Campus (Cal Poly-San Luis)
Units	5	Inst. Method	In Person
Status	Active	Schedule Print	Yes
Consent	No Special Consent Required	Component	Lecture
Grade Mode	Student Option	Final Exam	(No Option Selected)
Link To	Not linked to other sections	Combined With	Select section...

Section Attributes ✏

None Selected

Course Attributes

Course Level: Upper Division
State Support: State Support

Instructor ✏
Staff

Room
University Lecture Room

Room Attributes ✏
None Selected

Schedule
📅 MWF 11:10am-12pm ✖

Enrollment   0 current

Maximum	Wait Cap	Rm Cap Request
48	99	48

Notes ✏
None Assigned

Comments

⚒ Bridge Tools   ✖ Cancel   ✔ Save Section

- **Section # - will auto-populate in chronological order**
- **Component – defaults to primary component**
- **Enrollment – enter Maximum and Rm Cap Request**
- **Instructor – enter instructor on record or select staff**
- **Schedule – select *Does Not Meet* to add a day/time**
- **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 – No or Yes to publish to Schedule of Classes**

- **Snapper – use pre-defined "Patterns" or "User Defined"**

  - **If User Defined - type in meeting pattern i.e. MWF 11:10am-12pm, select "Add"**

  - **Reminder to use 10 or 40 mins after the hour in keeping with Cal Poly time**

  - **Be sure to use AM or PM or the system will default to AM**

  - **Military time can be used i.e. MW 1410-1600**

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 primary component; select Laboratory**
- **Enrollment – enter Maximum and Rm Cap Request**
- **Instructor – enter instructor on record or select staff**
- **Schedule – select "*Does Not Meet"* to add a day/time**
- **Notes – add if applicable**
- **Room – select from drop down or use search to find**
- **Units – as with PSoft, units shown is for both components.**
- **i.e. 5 Units = 3 unit lecture + 2 unit lab**
- **Schedule Print – No or Yes to publish to Schedule of Classes**

- **Meeting pattern is changed by clicking on "*Does Not Meet* "**

  - **Active section is highlighted in green**

  - **Select "Patterns" for standard meeting patterns or User Defined to add a day/time**

  - **Click on "Accept" once meeting pattern is finalized**

- **"Link To"** related component by selecting desired lecture or Any enrollment section

- **CHEM 439-04 would be one to one relationship between lecture/lab**

- **Any enrollment section (lecture) would be "9999"**

Review all fields and click on "Save Section"

- **View of related components**

  One to one lecture/lab relationships are shown with a related line

  CHEM 439 – Instrumental Analysis

⊗	01	LEC	Staff
⊗	─02	LAB	Staff
⊗	└─03	LAB	Staff

  Link to *any* enrollment section, or "9999" does not have a related line between the lecture/act

  > ERSC 144 – Introduction

⊗	01	LEC
⊗	02	ACT
⊗	03	ACT
⊗	04	ACT

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**

  🚫 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		
Section	Campus	Schedule
COMS 101-05 LEC Public Speaking Patrick Frisco	MAIN@SLO	MW 8:10am-10am

  ▪ **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 -05**

  Enrollment

Maximum	Wait Cap	Rm Cap Request
48	99	24

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

  Enrollment

Maximum	Wait Cap	Rm Cap Request
24	99	24

  ▪ **Enrollment/Room Caps are amended accordingly - click on "Save Section" when completed** ✔ Save Section

  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.

  🚫 Enrollment Cap must be < or = Actual Room Cap (SHARED Room Group)
  Enrollment Cap must be < or = Actual Room Cap (SHARED Room Group)
  - Enrollment Cap < or = Actual Room Cap ⤴

- **"Validate" can be selected more than once to determine if errors, warnings or workflow messages might require action prior to generating workflow. Caution: do not "Start Workflow" until ready to submit schedule**

- **Warnings and Workflow validation messages will allow the scheduler to proceed with selecting "Start Workflow"**
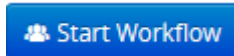
**   Start Workflow**

- **Once the scheduler starts workflow in Design Mode, the system will automatically turn to Refine Mode**

- **Changes in Refine Mode are real time to PSoft unless workflow has been generated that requires approval from the Office of the Registrar**

5 Approved Meeting Patterns

CAL POLY
SAN LUIS OBISPO

Scheduling Time Patterns
Prime Time = 9 am -3 pm
REMINDER: 50% of scheduled lecture classes should be outside of Prime Time hours

MWF 3 units (150 min/wk)
MW, WF, MF, TR 2 units (100 min/wk)

7:10am-8:00am
8:10am-9:00am
9:10am-10:00am
10:10am-11:00am
11:10am-12:00pm
12:10pm-1:00pm
1:10pm-2:00pm
2:10pm-3:00pm
3:10pm-4:00pm
4:10pm-5:00pm
5:10pm-6:00pm
6:10pm-7:00pm
7:10pm-8:00pm
8:10pm-9:00pm

MW, WF, MF 4 units (220 min/wk)

8:10am-10:00am
10:10am-12:00pm
12:10pm-2:00pm
2:10pm-4:00pm
4:10pm-6:00pm
6:10pm-8:00pm
7:10pm-9:00pm
8:10pm-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

TR 3 units (160 min/wk)

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

TR 4 units (220 min/wk)

7:10am-9:00am
9:10am-11:00am
University Hour
12:10pm-2:00pm
2:10pm-4:00pm
4:10pm-6:00pm
5:10pm-7:00pm
6:10pm-8:00pm
7:10pm-9:00pm
8:10pm-10:00pm

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

Any 4 days/wk 4 units (200 min/wk)

7:10am-8:00am
8:10am-9:00am
9:10am-10:00am
10:10am-11:00am
11:10am-12:00pm
12:10pm-1:00pm
1:10pm-2:00pm
2:10pm-3:00pm
3:10pm-4:00pm
4:10pm-5:00pm
5:10pm-6:00pm
6:10pm-7:00pm
7:10pm-8:00pm
8:10pm-9:00pm

5 days/wk 5 units (250 min/wk)

7:10am-8:00am
8:10am-9:00am
9:10am-10:00am
10:10am-11:00am
University Hour
12:10pm-1:00pm
1:10pm-2:00pm
2:10pm-3:00pm
3:10pm-4:00pm
4:10pm-5:00pm
5:10pm-6:00pm
6:10pm-7:00pm
7:10pm-8:00pm
8:10pm-9:00pm

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

- **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 Framer

- **The Framer provides a view of sections by Instance. Historical data can be viewed in the Framer based on information provided by PSoft.**

CourseLeaf/CLSS – Fall Quarter 2020 – English

48 Courses, 165 Sections
Plan Phase   Design Mode

View By ▾ | ☑ Validate | ✗ Bridge Tools | ♨ Visualize | ▼ Filter | ⊞ Framer | Export ▾
☐ Show courses with no sections

CourseLeaf/CLSS – Schedule Framer

View ▾ | ▼ Filter | ⬈ Export

✓ Summary
Standard
Detail

Customize...

	Summer Quarter 2020	Fall Quarter 2020	Sp...
ENGL 131 Writing and Rhetoric Stretch (Part I)		1 LEC (20)	
ENGL 133 Writing and Rhetoric for Multilingual Students		4 LEC (88)	1 LEC (21)
ENGL 134 Writing and Rhetoric		50 LEC (968)	24 LEC (528)
ENGL 135 Writing and Rhetoric Tutorial		2 ACT (200)	1 ACT (100)
ENGL 145 Reasoning, Argumentation, and Writing	7 LEC (175)	20 LEC (575)	23 LEC (550)
ENGL 148 Reasoning, Argumentation and Professional Writing			3 LEC (75)
ENGL 149 Technical Writing for Engineers	2 LEC (50)	13 LEC (350)	19 LEC (450)
ENGL 150	2 ACT (60)	1 ACT (50)	1 ACT (50)

- **Summary view gives a snapshot of each section with the number of sections offered, student count (as reported in PSoft) and delivery method information.**

View ▾ | ▼ Filter | ⬈ Export

‹ | **Spring Quarter 2020** | **Summer Quarter 2020** | **Fall Quarter 2020** | ›

Use the arrows to navigate through Instances

- **Standard view provides summarized information and instructor name**

- **Detail view provides the standard information and the day/time**

- **Customize view will allow to choose the instances and the number of columns to view**

Instances selected = Spring Quarter 2020 & Spring Quarter 2021

Columns = 2

Select Accept

- **Selecting an instructor from the "Standard" or "Detail" view will open a new window with historical data specific to that instructor**

7   Heat Map / Visualize

- **Heat maps provide a visual representation of the number of sections in a scheduled week.**

- Hovering over a particular shade of red on the heat map will reveal the number of offerings for that time. "Visualize" maps out the intensity of when course offerings are scheduled the heaviest.

- **The shaded bar displays a visual on the sections. The far left number (1) indicates the least amount of sections in a scheduled time frame and the far right number (12) shows the number of sections during the busiest time.**

- **The small blue number (77) indicates sections that Do Not Meet (TBA)**

- **Clicking on the heat map will reveal detailed descriptions of offerings**

- **Heat Map can be viewed by selected days of the week**
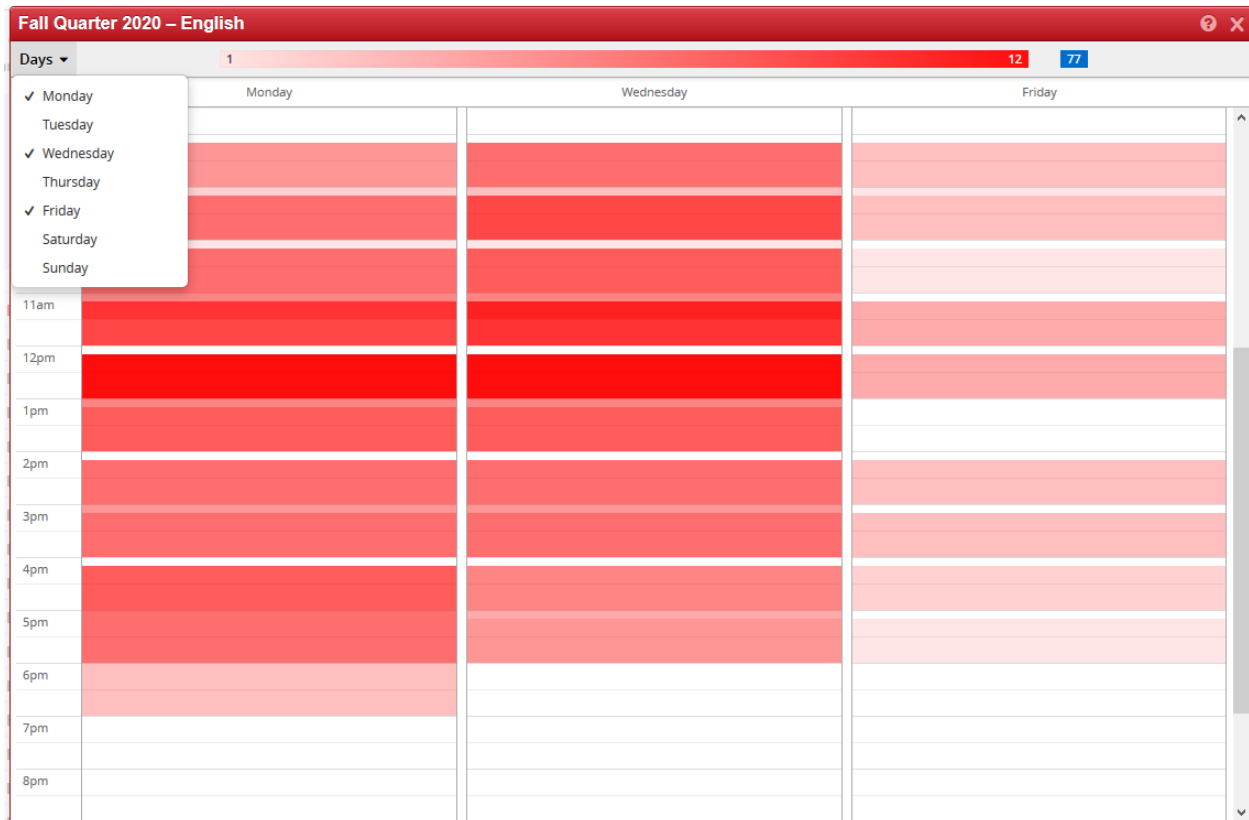
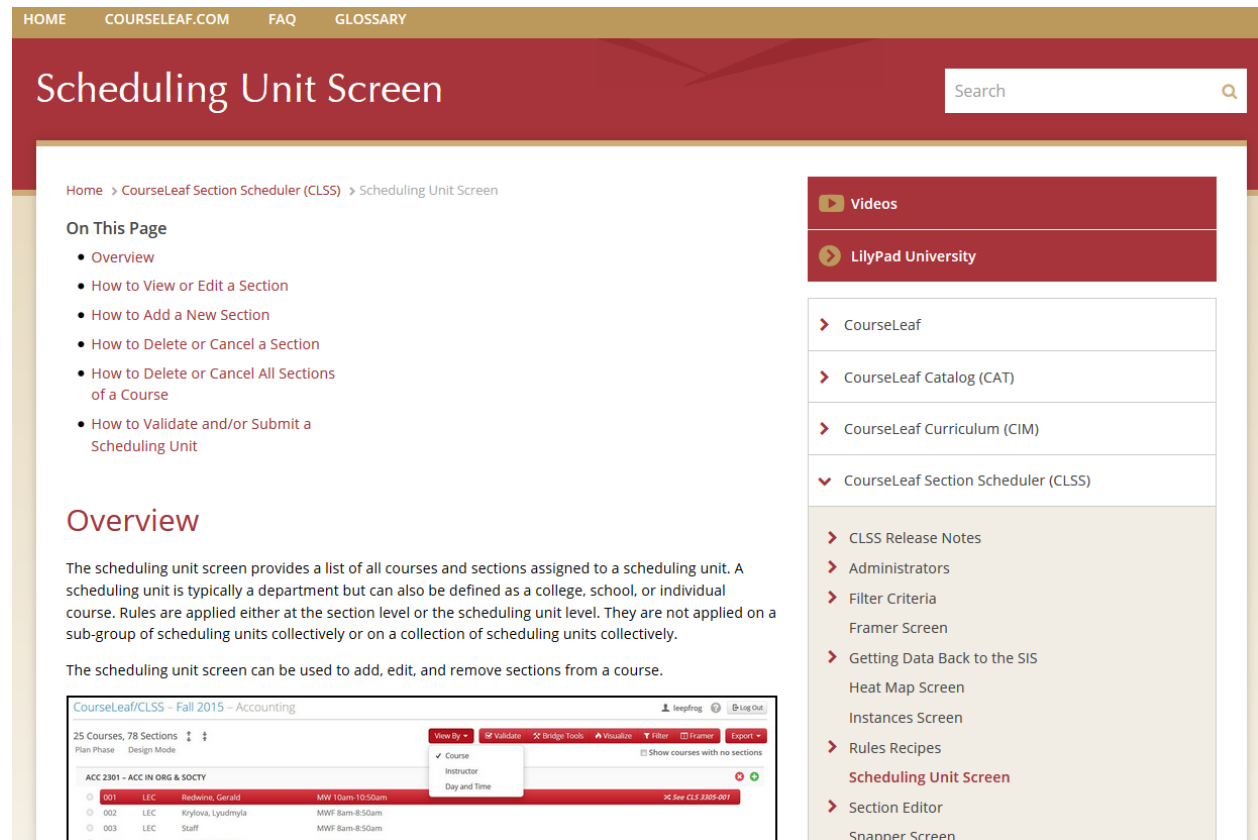- **Heat Map for *all* scheduling units Fall 2020**
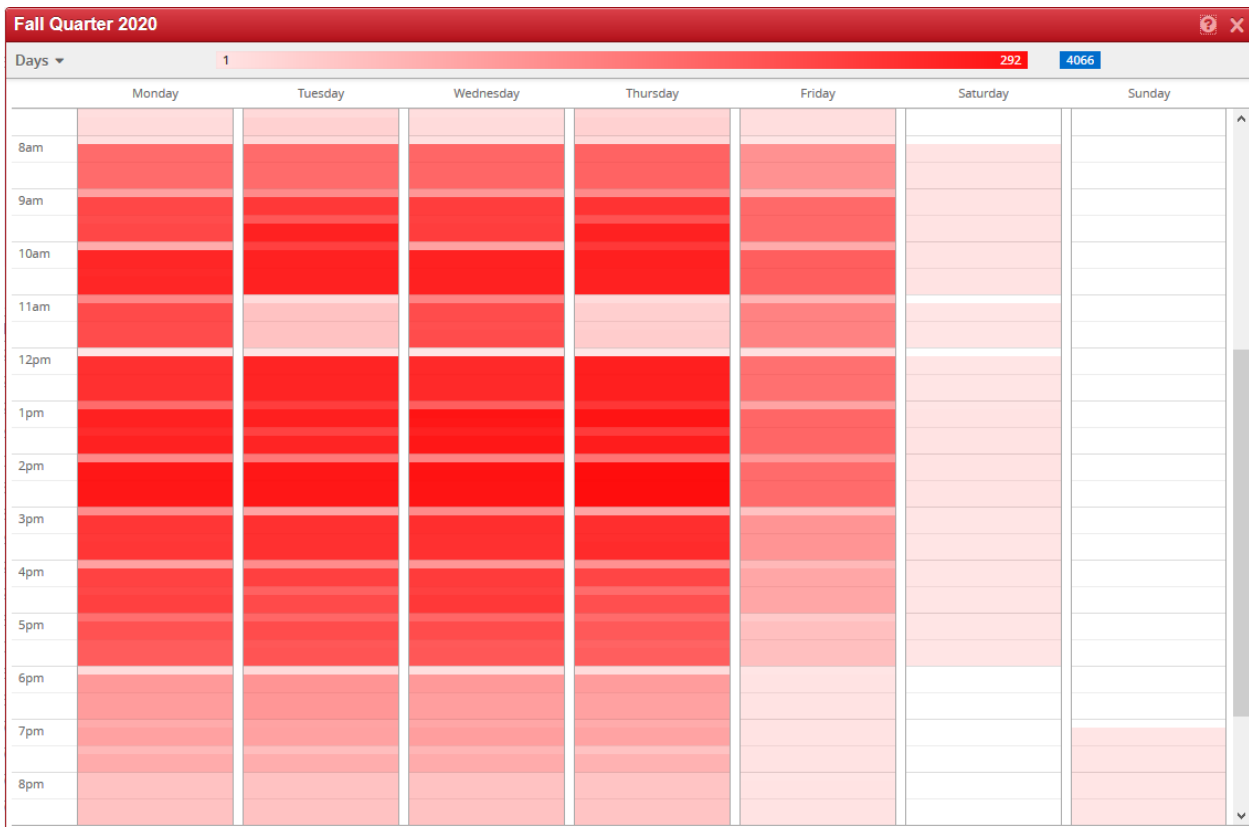
8   Glossary

- **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.

9   Resources

- **Resources/Bibliography:**

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

- **Office of the Registrar website**: **https://registrar.calpoly.edu/academic-scheduling**

  - **FAQ's (Frequently Asked Questions)**

~ End BPG ~