# 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>
<tr>
<td>10/5/2020</td>
<td>Vicky Myers</td>
<td>Framer &amp; Visualize added</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](URL)

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](URL)

69 Scheduling Units
1,866 Courses 7,714 Sections

- Double click on Scheduling Unit

![Scheduling Unit List](URL)
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.

“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

```plaintext
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
```

<table>
<thead>
<tr>
<th>ENGL 131 – Writing and Rhetoric Stretch (Part I)</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 LIC Gardiner, Tyler +1 MTWR 1:10pm-2pm</td>
</tr>
<tr>
<td>ENGL 132 – Writing and Rhetoric Stretch (Part II)</td>
</tr>
<tr>
<td>01 LIC Storkey, Glenn MW 12:10pm-2pm</td>
</tr>
<tr>
<td>ENGL 133 – Writing and Rhetoric for Multilingual Students</td>
</tr>
<tr>
<td>01 LIC Peers, Jason +1 MW 10:10am-12pm</td>
</tr>
<tr>
<td>02 LIC Peers, Jason +1 MW 12:10pm-2pm</td>
</tr>
<tr>
<td>03 LIC Ferre, Scott +1 TWRF 9:10am-10am</td>
</tr>
<tr>
<td>04 LIC Ferre, Scott +1 Does Not Meet</td>
</tr>
<tr>
<td>ENGL 134 – Writing and Rhetoric</td>
</tr>
<tr>
<td>01 LIC Bates, Jennifer +1 Does Not Meet</td>
</tr>
<tr>
<td>02 LIC Anley, Jennifer +1 Does Not Meet</td>
</tr>
<tr>
<td>03 LIC Brisgo, Courtney +1 Does Not Meet</td>
</tr>
<tr>
<td>04 LIC Rirector, Jonathan +1 Does Not Meet</td>
</tr>
<tr>
<td>05 LIC St John, Leslie +1 TWRF 10:13am-11am</td>
</tr>
<tr>
<td>06 LIC Brisgo, Courtney +1 Does Not Meet</td>
</tr>
<tr>
<td>07 LIC Waters, William +1 TWRF 10:13am-11am</td>
</tr>
<tr>
<td>08 LIC Staff +1 Does Not Meet</td>
</tr>
<tr>
<td>10 LIC Martin-Elston, Erin +1 TWRF 8:10am-9am</td>
</tr>
</tbody>
</table>

- 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, Marc  
  MTWR 8:10am-9am
- **ENGL 205-01** – Sequence III: Mid-Seventeenth to Late E...  
  LEC  
  Starkey, Glen  
  MWF 8:10am-9am; T 10:10am-11:...  
  MTWR 8:10am-9am
- **ENGL 231-01** – British Literature: 1789 to the Present  
  LEC  
  Staff  
  MTWR 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  
  MTWR 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 E...  
  LEC  
  Starkey, Glen  
  MWF 8:10am-9am; T 10:10am-11:...  
  MTWR 8:10am-9am
- **ENGL 231-01** – British Literature: 1789 to the Present  
  LEC  
  Staff  
  MTWR 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 Stud...  
  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 Stud...  
  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

- **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”

Click on “*Does Not Meet*” and again on “Patterns” drop down menu to view Standard Meeting Patterns
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.)

- Class notes – click on pencil to edit

- Use Search or scroll to add pre-defined class note
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 for on-going use.
Review fields before clicking on “Save Section”

Section has been successfully added

- Adding a new course to the schedule

  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 110 – Western Civilization: Ancient to Renaissance
- HIST 200 – Special Problems for Undergraduates
- HIST 201 – United States History to 1865
- HIST 202 – United States History Since 1865
- HIST 206 – American Cultures
- HIST 210 – World History I
- HIST 213 – Modern Political Economy
- HIST 216 – Comparative Social Movements
- HIST 222 – World History, 1000 - 1800
- HIST 223 – World History, 1800 - Present
- HIST 225 – The World at War
- HIST 303 – Research and Writing Seminar in History
- HIST 304 – Historiography
- HIST 313 – Modern Middle East
- HIST 316 – Modern East Asia

- HIST 21P – Study Abroad
- HIST 41P – Study Abroad
- HIST 100 – Introduction to the Study of History
- HIST 110 – Western Civilization: Ancient to Renaissance
- HIST 111 – Western Civilization: Reformation to the Present
- HIST 200 – Special Problems for Undergraduates
- HIST 201 – United States History to 1865
- HIST 202 – United States History Since 1865
- HIST 206 – American Cultures
- HIST 207 – Freedom and Equality in American History
- HIST 208 – Survey of California History
- HIST 210 – World History I
- HIST 213 – Modern Political Economy
- HIST 216 – Comparative Social Movements
- HIST 221 – World History, Beginnings to 1000
- HIST 222 – World History, 1000 - 1800
- HIST 223 – World History, 1800 - Present
- HIST 225 – The World at War

New course will appear as follows when view is expanded

Select the Plus icon to add new course

- Delete offering by clicking on the red x to the left of the section
- 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

- 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

• Select the “Add” Icon to add a new 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

  ![Any enrollment section dropdown]

  - 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
  - LEC 01: Staff
  - LAB 02: Staff
  - LAB 03: Staff

Link to any enrollment section, or “9999” does not have a related line between the lecture/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

⚠️ 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 -05

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

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

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

- Enrollment/Room Caps are amended accordingly - 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.
• “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”

• 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

**Scheduling Time Patterns**

**Prime Time**
- 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.

---

**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**

**View By** - **Bridge Tools** - **Visualize** - **Filter** - **Framer** - **Export** - **Show courses with no sections**

---

**CourseLeaf/CLSS – Schedule Framer**

| ENGL 131 | Writing and Rhetoric Stretch (Part 1) | Summer Quarter 2020 | Fall Quarter 2020 | 1 LEC (50) | 1 LEC (21) |
| ENGL 133 | Writing and Rhetoric for Multilingual Students | 4 LEC (888) | 5 LEC (568) | 24 LEC (1100) |
| ENGL 134 | Writing and Rhetoric | 50 LEC (568) | 24 LEC (1100) |
| ENGL 135 | Writing and Rhetoric Tutorial | 2 ACT (360) | 1 ACT (100) |
| ENGL 145 | Reasoning, Argumentation, and Writing | 7 LEC (175) | 20 LEC (175) | 23 LEC (510) |
| ENGL 148 | Reasoning, Argumentation and Professional Writing | | 3 LEC (75) |
| ENGL 149 | Technical Writing for Engineers | 2 LEC (50) | 13 LEC (500) | 19 LEC (450) |

- 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

<table>
<thead>
<tr>
<th>Course</th>
<th>Summer Quarter 2020</th>
<th>Fall Quarter 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENG. 131</td>
<td>Writing and Rhetoric Stretch (Part I)</td>
<td>01 - LEC: Gardner, Tyler</td>
</tr>
<tr>
<td>ENG. 133</td>
<td>Writing and Rhetoric for Multilingual Students</td>
<td>01 - LEC: Peters, Jason</td>
</tr>
<tr>
<td>ENG. 134</td>
<td>Writing and Rhetoric</td>
<td>01 - LEC: Bate, Jennifer</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
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<th>Fall Quarter 2020</th>
</tr>
</thead>
<tbody>
<tr>
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<td>ENG. 134</td>
<td>Writing and Rhetoric</td>
<td>01 - LEC: Bate, Jennifer</td>
</tr>
</tbody>
</table>

S:\University Scheduling\Course Leaf CLSS 10/7/2020
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)