Scheduling Tips and Resources

University Scheduling Website - www.universityscheduling.calpoly.edu

- Production Calendar
- Approved Time Patterns
- List of lecture rooms and capacities
- Link to MDS website – identifies the specific equipment in smart, multi-media, and general purpose rooms
- And SO MUCH MORE! Come visit us!

Scheduling Phases

- Planning

This is the initial phase of the scheduling process in which departments build their schedules online in PeopleSoft. Special attention should be given to:

1. Identify special room requests by selecting 'Room Characteristics' such as: smart rooms, multi-media rooms, computer labs
2. Identify large lecture classes by the 'Requested Room Cap'
3. Medical needs that require special scheduling consideration
4. Distance Learning classes – these require special rooms and set-up time
5. Back-to-back requests
6. Variable unit classes – These classes will roll as variable unit classes unless the department notifies us that the intent is to fix the unit value of a class. The unit value will not automatically be fixed if you schedule a class for a specific amount of time. This is very important to complete before students begin registering and choose the wrong unit value when doing so
7. Section Numbers must be 2 digits. For example, section 2 would be 02, and section 10 would be 10

Rooms are assigned after the submission of the Planning Phase. If a department has day/time changes that will require lecture room consideration, get the changes to University Scheduling as soon as possible**. The changes will depend on university lecture room availability.**

- Proofing

This phase is meant for *PROOFING* prior to the publication of the class schedule on PASS. *MINOR* changes only are expected at this time. Special attention should be given to footnotes and print controls.

- PASS

This is when the schedule for a term becomes available to students to begin planning their schedules. After the schedule becomes available on PASS, certain changes require dean's approval such as:

Canceling a class
Adding a class
Changing the day pattern of a class
Changing the time of a class
Changing coding of a class such as 'No Consent' to 'Department Consent'

You don't need dean's approval to:

> Add an instructor assignment to a class
> Change the enrollment capacity
> Request a room change

- Reporting

Final scheduling materials are sent to departments for reconciliation. The main focus for this phase is to verify that faculty assignments are correct. For every section that has enrollment an instructor must be assigned.

Communicating Changes/Needs

- Emails can be sent to our email box to: classschedule@calpoly.edu
- Requests are triaged from this account. It's encouraged that scheduling changes be sent to this address. Due to furloughs, all schedulers will be assisting with the requests that are received
- In the 'Subject' line of the email, place the term, class, and type of change. An example would be '2104 CSC 342 – Instructor Assignment Change'
- Request for larger room should be submitted prior to over-enrolling students

Scheduling 'TBA' classes

- Remember to place 'TBA' in the 'Pat' field where you would normally place the day pattern of a class
- In the blue hyperlink 'Meeting APDB Mapping Values' place the number of TBA hours to be scheduled
- Your total contact hours must equal the required contact hours for the course determined by the catalog requirement

Instructor Changes

- To remove an instructor from a class section, please use the 'minus' key. This will clear out all the information that has mapped to tables behind the scene. Once you have deleted the row by using the minus key, 'SAVE' your data.
- Enter the empl ID and tab out of the field. Wait for the processing to complete.
- Select 'Approved' in the 'Access' field. This gives instructor's access to Blackboard and portal information
- Save your data.

Topics Courses

- To identify a topic for a class, the topic must first be approved and listed in the catalog. You can get a list of approved topics by going to the PeopleSoft catalog. The topics are listed at the bottom of the 'Catalog Data' tab if there are approved topics.
- The topic will be placed in the schedule by going to 'Maintain Schedule of Classes' on the first tab 'Basic Data' midway down the page there is a field to place the 'Course Topic ID' number or you can use the magnifying glass next to this field to select the topic.
- Topics need to be identified prior to the class appearing on PASS.

Identifying Room Types

- To identify a specific type of room, such as a smart, multi-media, computer lab, you must enter the 'Room Characteristic' on the 'Meetings' tab in the schedule of classes. It is recommended that if a specific room is needed, this should be identified at the Planning Phase prior to the assignment of the lecture rooms.
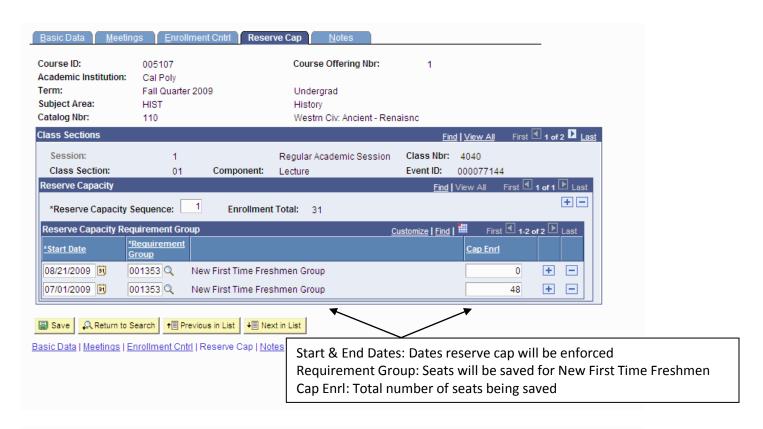
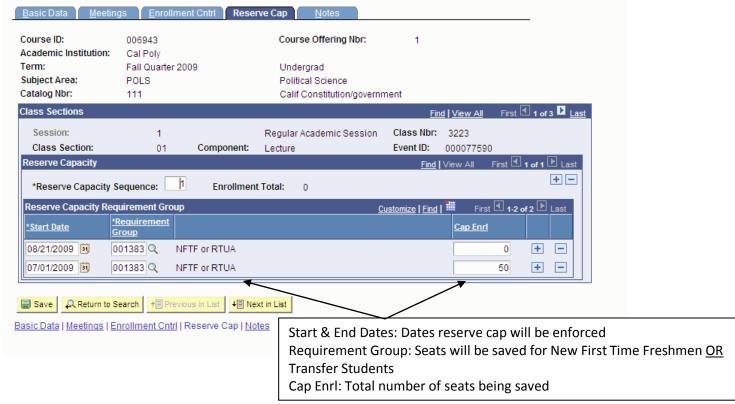# Three screens to review changes/monitor enrollment – Follow this path:

Curriculum Management < Schedule of Classes

- Maintain Schedule of Classes – Where you would go to update/edit your schedule
    1. Remember, if you want to remove a class or section, use your minus button on the 'Basic Data' tab for the class.
    2. If you want to add a class not currently scheduled for the term, you will need to go to 'Schedule New Course' under 'Curriculum Management'.
- Update Sections of a Class – At a glance you can review the following codes:
    1. Consent
    2. Print
    3. Class Associations – linking of components such as this group of labs should enroll in this lecture.
    4. Status of a class – If it's open, closed, or canceled
    5. Section Numbers – Two digits
    6. Enrollment Caps
    7. Enrollment
    8. Waitlists – How many students on waitlist (waitlists are purged shortly before the first day of classes)
        - After the waitlists are purged from PeopleSoft, these lists are 'pushed' to the faculty center for the faculty member to access on the first day of classes.
- Class Associations – Overview of class sections
    1. Unit value (variable or fixed)
    2. Components and contact hours for each component
    3. Class Requisites – hard registration controls
        - Catalog Requisites – controls that pull from the catalog. Enforced each time class offered
        - Class Association Requisites – these are 'term specific' registration controls. For example, 'concurrent enrollment in ARCH 342-05' is required. This specifies not only a course requisite but a section specific requisite that is built term by term and doesn't pull from the catalog.

Identifying Classes with Block Scheduling Reserve Capacities

- Data will be entered and maintained/adjusted by Scheduling staff at appropriate times.
- Curriculum Management – Schedule of Classes – Maintain Schedule of Classes – Reserve Cap (TAB)

| Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes |

Course ID: 005107 Course Offering Nbr: 1
Academic Institution: Cal Poly
Term: Fall Quarter 2009 Undergrad
Subject Area: HIST History
Catalog Nbr: 110 Westrn Civ: Ancient - Renaisnc

Class Sections Find | View All First ◄ 1 of 2 ► Last

Session: 1 Regular Academic Session Class Nbr: 4040
Class Section: 01 Component: Lecture Event ID: 000077144

Reserve Capacity Find | View All First ◄ 1 of 1 ► Last

*Reserve Capacity Sequence: 1 Enrollment Total: 31

Reserve Capacity Requirement Group Customize | Find | ▦ First ◄ 1-2 of 2 ► Last

*Start Date	*Requirement Group		Cap Enrl		
08/21/2009	001353	New First Time Freshmen Group	0	+	−
07/01/2009	001353	New First Time Freshmen Group	48	+	−

💾 Save 🔍 Return to Search ↑ Previous in List ↓ Next in List

Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes

> Start & End Dates: Dates reserve cap will be enforced
> Requirement Group: Seats will be saved for New First Time Freshmen
> Cap Enrl: Total number of seats being saved

| Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes |

Course ID: 006943 Course Offering Nbr: 1
Academic Institution: Cal Poly
Term: Fall Quarter 2009 Undergrad
Subject Area: POLS Political Science
Catalog Nbr: 111 Calif Constitution/government

Class Sections Find | View All First ◄ 1 of 3 ► Last

Session: 1 Regular Academic Session Class Nbr: 3223
Class Section: 01 Component: Lecture Event ID: 000077590

Reserve Capacity Find | View All First ◄ 1 of 1 ► Last

*Reserve Capacity Sequence: 1 Enrollment Total: 0

Reserve Capacity Requirement Group Customize | Find | ▦ First ◄ 1-2 of 2 ► Last

*Start Date	*Requirement Group		Cap Enrl		
08/21/2009	001383	NFTF or RTUA	0	+	−
07/01/2009	001383	NFTF or RTUA	50	+	−

💾 Save 🔍 Return to Search ↑ Previous in List ↓ Next in List

Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes

> Start & End Dates: Dates reserve cap will be enforced
> Requirement Group: Seats will be saved for New First Time Freshmen OR Transfer Students
> Cap Enrl: Total number of seats being saved

Fall 2010 Registration Timeline

April 21	Fall 2010 class schedule is published in PASS
May 5 – 27	Registration rotations (enrollment appointments) for continuing students
May 28	CPReg closed for continuing students Fall 2010 class schedule is unavailable in PASS
July 19 – 30	New freshmen are block enrolled in classes
August 2	Fall 2010 class schedule is again available in PASS
August 16	Registration rotation (enrollment appointment) for transfer students
August 17 – 19	Registration rotations (enrollment appointments) for new freshmen to add a class if block-enrolled for less than 16 units or to make changes to their schedules
August 23	Open enrollment begins