# Creating Course Offerings-092807

<table>
<thead>
<tr>
<th>Step</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate: Curriculum Management &gt; Course Catalog &gt; Course Catalog</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Add a New Value</strong> tab.</td>
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<tr>
<td>3.</td>
<td>If you retain the default in the <strong>Course ID</strong> field (000000), the system will generate a unique ID when you save the page. PeopleSoft recommends that you let the system generate the course ID. Click the <strong>Add</strong> button.</td>
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<td>4.</td>
<td>Use the <strong>Catalog Data</strong> page to define course titles, course units, grade bases, topics, and repeat rules.</td>
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<tr>
<td>5.</td>
<td>In the <strong>Effective Date</strong> field, enter a date for this course. The effective date defines when the status you select is valid. Use a new effective date each time you make a change to a course offering. Insert new rows as needed, and modify the record. This way you can track historical course changes.</td>
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<td></td>
<td>When you schedule a class for a term, the system compares the start date of the term with the effective dates on the rows for the course in the <strong>Catalog Data</strong> page. It will use the row which has the most recent effective date that is prior to the start of the term (and the row must be Active). Therefore, you do not need to create a new catalog entry for every term. Simply insert a new effective-dated row for your revisions.</td>
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<tr>
<td></td>
<td>The <strong>Effective Date</strong> field defaults to the current system date, but can be changed if needed. Use a date far in the past to ensure the course will be available in your system. Enter a date into the <strong>Effective Date</strong> field.</td>
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<tr>
<td>6.</td>
<td>The <strong>Status</strong> can be active or inactive. Select <strong>Active</strong> when the course is valid for your institution. You can keep all courses in the database for historical research purposes by inserting a new effective-dated row and setting the status to <strong>Inactive</strong> for courses that you no longer offer.</td>
</tr>
<tr>
<td>7.</td>
<td>The <strong>Description</strong> appears on items such as transcripts, advisement reports, study lists, course catalog search, and the schedule of classes. Enter the desired information into the <strong>Description</strong> field.</td>
</tr>
<tr>
<td>8.</td>
<td>The <strong>Long Course Title</strong> appears on the course catalog report. Enter the desired information into the <strong>Long Course Title</strong> field.</td>
</tr>
<tr>
<td>9.</td>
<td>Enter the long description of the course in the <strong>Long Description</strong> field.</td>
</tr>
</tbody>
</table>
10. In the **Course Units/Hours/Count** group box, there are four unit types that you can attach to a course in the course catalog: Minimum Units, Maximum Units, Academic Progress Units, or Financial Aid Progress Units.

   These values default to the **Schedule of Classes - Class Associations** page, where you can override course unit values for a class. When a student enrolls in a class, corresponding fields on the enrollment page populate with the values on the **Class Associations** page.

   Once a student enrolls, the system uses each unit type to determine the student’s academic and financial aid load, academic level, and grade point average. As a general rule, the minimum, maximum, academic progress, and financial aid progress units are always the same. The exception is with multi-term courses, remedial courses, and variable unit courses.

11. Click in the **Minimum Units** field.

12. In the **Minimum Units** field, enter the minimum units that the course is worth. The minimum and maximum units are the same, except for a variable unit class.

   Enter the desired information into the **Minimum Units** field.

13. The system uses **Academic Progress Units** in conjunction with the billing factor to calculate billing units, in order to calculate per unit fees. The system also uses academic progress units to calculate academic load. Academic progress units are usually equal to the minimum/maximum units, except for a multi-term class.

14. The value in the **Financial Aid Progress Units** field represents the number of units for the course that the system counts towards tracking a student's financial aid load for a term.

15. Select the **Last Course of Mult Term Seq** check box so that **Academic Progress Units** can be less than the minimum units for this course.

   The academic progress units for the last course in a multi-term course is less than the minimum units because the minimum units have been accumulating over the entire sequence, and they are only granted after the student completes the last course. The academic progress units, on the other hand, are still granted for each course in the sequence, so they are less than the minimum units at the end of the sequence.
16. The value in the **Enrollment Unit Load Calc Type** field determines how the Enrollment Engine calculates the student's academic load.

   Use the **Actual Units** option for any course that has identical values for the **Minimum Units**, **Maximum Units**, and **Academic Progress Units** fields. The exception to this rule is when you are creating a variable unit course. The enrollment engine calculates the number of units the student can take in the term by looking at the **Units Taken** field on the **Enrollment** page. You can also use this option for courses that you do not want to count toward the student’s academic load.

   Select **Academic Progress Units** for any course where the **Minimum Units**, **Maximum Units**, and **Academic Progress Units** are not identical, such as remedial courses and multi-term sequence courses. Selecting this option requires the system to look at the academic progress units when it calculates academic load. For example, the minimum units and maximum units might be 0, because you do not want academic level and GPA to be affected by this course. The academic progress units would be 3 so the course would still be used to calculate academic load and billing units. You can also use this option for that you want to be used in calculating load, but not used in calculating GPA.

17. Select the **Grading Basis** for this course. You can override the grading basis for individual class offerings when you create the schedule of classes.

18. The options for **Grade Roster Print** are:
   - **By Student**: Grade rosters print for each student. Each student has a distinct grade roster, separated by a page break.
   - **Component**: Grade rosters print for the graded component of the course. The graded component is specified on the **Components** page.
   - **Instructor**: Grade rosters print for the graded component of the course. The graded component is specified on the **Components** page. A copy of the grade roster prints for each instructor, primary or otherwise. The number of copies that print is equal to the number of instructors for the course (primary or otherwise).
   - **None**: No grade roster prints for the course.

19. Select the **Repeat for Credit** check box to indicate that the class can be repeated for additional credit (as opposed to repeating for grade improvement only). If you do not select the check box, the class is subject to repeat rules set up in the **Repeat Rule Table** component.

20. The system populates the **Total Units Allowed** field to the maximum units for the course. However, if you have selected the **Repeat for Credit** check box, you may edit and increase this value. This value must be equal to or greater than the maximum units for the course. The system enforces the lower of the two limits that you define (units or completions).

21. The system populates the **Total Completions Allowed** field to 1. However, if you have selected the **Repeat for Credit** check box, you may edit and increase this value. This value must be equal to or greater than 1. The system enforces the lower of the two limits that you define (units or completions).

22. Use the **Instructor Edit** field to select how you want the system to prompt for instructor IDs during class enrollment. This option determines the availability of and the prompt values for the instructor ID field on the **Enrollment Request**, **Quick Enroll**, **Enrollment** and **Self-Service Enrollment** pages. The system populates the value for the **Instructor Edit** field by default to the **Class Associations** page, where you can override the value.
23. Options for the **Instructor Edit** field are:
   - **No Choice**: If you select this option, the system makes the **Instructor ID** field on the Enrollment Request page unavailable and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Schedule of Classes - Meetings page: Assignment tab. Thus, the student has no choice of instructor.
   - **Class Instructor Edit**: If you select this option, the system makes active the **Instructor ID** field on the Enrollment Request, Quick Enroll, Enrollment and Self Service Enrollment pages and prompts the user with only the 'Primary Instructors' for the class, as defined on the Meetings page. Use this option for independent study courses or the like, for which the student can select one of several ‘Primary’ instructors.
   - **Instructor/Advisor Edit**: If you select this option, the **Instructor ID** field on the Enrollment Request, Quick Enroll, Enrollment and Self Service Enrollment pages. The system prompts the user with only the instructors available to teach this course, as defined on the Instructor/Advisor Table page.

24. Use the **Consent** field to select the consent type for enrollment in the course. The available options are:
   - **No Consent**: No special consent is required for a student to enroll.
   - **Instructor or Departmental**: If you indicate that either Instructor or Departmental consent is required for enrollment, consent is granted either by setting an Override Permission option on the Enrollment Request page or by using class permission numbers.

25. Use the **Requirement Designation** field to enter a requirement designation for the course. A requirement designation can be extra work that has to be done for a course, such as Design Credit, or a requirement designation can specify a special variety of a course to use in a course list for the Academic Advisement application.

   Requirement designation values are defined on the Requirement Designation Table page. Example requirement designation values are Design Credit, Thesis Choice, and so on.

   Requirement designations feed into the **Academic Advisement** application.

26. You can select an equivalent course group for the course. Equivalent course groups are defined on the Course Equivalencies page. On this page, you are adding the course to a group of equivalent courses for requisite checking and degree progress requirement purposes. If two courses have the same **Equivalent Course Group** number, then they are equivalent to each other and can fulfill the same requirement.

27. Use the **Course Attributes** group box to select the general characteristics that describe the course offering in the **Course Attribute** and **Course Attribute Value** fields. Course attributes are defined on the Course Attribute Table page.

   Course attributes do not feed into the **Academic Advisement** application. They are primarily used for institutional research purposes, and to print repetitive text in the catalog and schedule of classes. Example course attribute and course attribute values are Degree Seeking Only - Open to Students in Any Plan, and Fall - Offered in Fall Only.

28. Select the **Override Topic Link ID** check box to manually update topic link IDs. When you select this check box the **Topic Link ID** field becomes available for edit. Use this functionality to link course topics across effective-dated rows by giving them the same topic link ID.
29. Use the **Description** tab to define course topics associated with a course. You attach topics to specific classes on the **Schedule of Classes - Basic Data** page.

30. Use the **Repeat for Credit** tab to select to allow students to repeat the topic for credit.

31. Click the **Offerings** link.

32. Use the **Offerings** page to define course numbers, link academic organizations to course offerings, and so on.

33. The system generates the **course offering number** and uses it for sequencing. The system also uses the course offering number to distinguish cross-offered courses where the course ID is the same, as are the requisites, but the course itself is listed in different subject areas, academic groups, and so on.

34. Enter the desired information into the **Catalog Nbr** field.

35. Enter your UMS Institution code (UMSxx) into the **Academic Institution** field.

36. Enter the desired information into the **Academic Group** field.

37. Enter the desired information into the **Subject Area** field.

38. The system populates the **Academic Organization** field from the academic organization linked to the subject on the **Academic Subject Table** page. You can override the value.

39. Enter the desired information into the **Academic Career** field.

40. If you have specified a dynamic class data rule for the academic career to which you assign this course offering, the system displays that rule in the **Dynamic Class Date Rule** field. You can override the default value.

   Select a dynamic class date rule to have the system assign that rule to all dynamic class sections of this course offering that you schedule (excluding open entry/open exit sections). After you schedule the class sections, you can run the Dynamic Class Dates process to calculate landmark dates for each class section. The process automatically uses the rule that you specify here for all dynamic date class sections. You can override this default rule on a section-by-section basis through the **Dynamic Class Dates** page. This field prompts you with only the dynamic class data rules that have not been designated for OEE enrollment on the **Dynamic Class Dates** page. If you leave this field blank and schedule the course within a dynamic date session, you receive a warning message indicating that a rule has not been defined.

41. The system assigns the value of the **Allow OEE (open entry/exit) Enrollment** check box based on the **Allow OEE Enrollment** check box on the **Academic Career Table** page for the academic career with which you have associated this course offering. You can override this setting on an offering-by-offering basis. Select this check box to attach a dynamic date rule to the offering, thus enabling students to enroll in OEE class sections of this course offering. The **OEE Dynamic Date Rule** field becomes available for edit. If you do not select the check box, you can always define the rule on the **Dynamic Class Dates** page.
42. The system assigns the value of the **OEE Dynamic Date Rule** field based on the **OEE Dynamic Date Rule** field on the **Academic Career Table 2** page for the academic career with which you associate this course offering. An open entry/exit (OEE) dynamic date rule is a dynamic class date rule that has been designated for OEE enrollment. The enrollment engine uses the OEE dynamic date rule to calculate significant class dates for a student whenever a student enrolls in an open entry/exit class. This field is available for edit only if you select the **Allow OEE Enrollment** check box for this course offering.

43. Use the **Course Approved** field to select the course approved status. Select **Pending** or **Denied** to prevent anyone from scheduling the class—the system does not list the course in the class scheduling function. Select **Approved**, and select the **Allow Course to be Scheduled** check box to enable scheduling of the course offering. Click the *Course Approved* list and select an entry in the list.

44. Select the **Allow Course to be Scheduled** check box so that the course can be scheduled for a term. A course can only be scheduled for a term if you select this check box, and set the **Course Approved** field to **Approved**.

45. Use the **Enrollment Requirement Group** group box to link requisites to courses. Enrollment requirement groups can consist of a variety of elements: courses, units, GPA, and so on.

46. **CIP codes** provide a taxonomic scheme that will support the accurate tracking, assessment, and reporting of fields of study and program completions activity.

47. **HEGIS codes** provide a taxonomic scheme that will support the accurate tracking, assessment, and reporting of fields of study and program completions activity.

48. Click the **Components** tab.

49. Use the **Components** page to define components such as lecture, laboratory, and discussion as well as instructor workload hours, room characteristics, additional fees, and final exams.

50. Use the **Course Component** field to select a course component for the offering. The course component indicates the parts of the course offering (lecture, laboratory, seminar, and so on). One course offering can have multiple components. Click the *Course Component* list and select an entry in the list.

51. From the **Final Exam** drop-down field, select whether a final exam is given in the course. The value you enter here defaults to the **Schedule of Classes**. Click the *Final Exam* list.

52. The options are:
   - **Yes**: The Yes value enables block final exam scheduling.
   - **No**: Indicates that this component has no final exam. Entering No eliminates this component from the block exam scheduling process.
   - **Last Class**: Indicates that a final exam is taken in the last regularly scheduled class (as opposed to during final examination week). Entering Last Class eliminates this component from the block exam scheduling process.

   Click an entry in the list.
53. The value in the **Instruction Mode** field indicates whether the course component is taught In Person or using Interactive TV, World Wide Web, Correspondence, and so on. The instruction mode relates to the attendance type. You can indicate an instruction mode, then select attendance type values for the course component that relate only to this instruction mode. For example, by selecting the In Person instructor mode, you can select an attendance type that applies only to the In Person instruction mode. If you leave the **Instruction Mode** field blank, the attendance types that you define for the course component applies to all instruction modes. When you create and update attendance rosters, only the attendance type values that relate to the instruction mode for the class are available for you to use. Instruction modes for classes are set on the **Schedule of Classes - Basic Data** page. Enter the desired information into the **Instruction Mode** field.

54. In the **Attendance Type** field, select each attendance type that your institution might use for the course component. The attendance type indicates the type of class meeting attendance roster you want to generate such as Class Meeting, Conference, Field Trip, Instructor Consultation, or Study Group. Add rows to for additional attendance types. When you track attendance, the system prompts you with only the attendance type values that your institution defines for the course component. Click the **Attendance Type** list and select an entry in the list.

55. It is recommended that you at least specify the attendance type value that your institution has selected on the **Academic Institution Table 3** page to use whenever you generate attendance rosters, as well as the fields you want the system to use for this component’s attendance type. Although you can generate attendance rosters for a course component without defining attendance type values and their associated fields, the system only creates a default attendance roster that includes: the Template Number for the class meeting attendance roster; the Attendance Type and its description; the Attendance Date; and each student's ID, name, and career. You then have to return to the **Components** page and define these values anyway for your institution to be able to track student attendance.

56. For each attendance type of the course component, use the check boxes to select the fields you want the system to use when generating class attendance rosters. You can set up the system to generate attendance rosters with as few or as many fields as you want to appear for each class section. When you generate attendance rosters, the available fields that appear on the attendance rosters for each attendance type depend on the options you select for each attendance type of the course component.

57. Use the **Room Characteristic** field to enter the room characteristics that you require for the course component. Characteristics you enter here default to the schedule of classes. Insert rows to add additional characteristics. This field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum number of room characteristics for Schedule25 is 96. Therefore, be sure you select values between 01 and 96 if you use Schedule 25.

Enter the desired information into the **Room Characteristic** field.

58. To add more room characteristics, click the **Add Row** button.

59. Click the **Save** button.

60. **End of Procedure.**