## Scheduling New Classes-100507

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<tbody>
<tr>
<td>1.</td>
<td>Navigate: Curriculum Management &gt; Schedule of Classes &gt; Schedule New Course</td>
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<td>2.</td>
<td>Enter your Institution: UMSxx.</td>
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<td>3.</td>
<td>Enter the desired information into the Term field.</td>
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<td>4.</td>
<td>Enter the Subject Area.</td>
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<td>5.</td>
<td>Select the Academic Career.</td>
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<td>6.</td>
<td>Click the Search button.</td>
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<tr>
<td>7.</td>
<td>We see a list of all candidate courses, since we didn't specify a catalog number. Click on the course you want to schedule.</td>
</tr>
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</table>
| 8. | Use the Basic Data page to define class sections, set permissions requirements, and designate any class attributes.  
   The Class Nbr will be set automatically when you save the scheduled class sections. The Class Number is equivalent to the CRN in the legacy system.  
   The system automatically defines one class section for you. |
| 9. | If the course is set up in the Course Catalog with multiple components for auto creation, clicking the Auto Create Component button will create one class section for each of the remaining components.  
   Click the Auto Create Component button. |
| 10. | If we need to schedule more class sections (for example, more recitations), we do that using the Add a New Row button.  
   We must fill in the required information on all the pages except for LMS Data and GL Interface for each class section. LMS Data and GL Interface are currently not used. |
| 11. | Select a Session value. |
| 12. | Each class section must have a unique Class Section number.  
   Your Institution may have a special numbering scheme for class sections of a course.  
   Enter a Class Section number. |
| 13. | Select the correct Component type for this section.  
   The Class Type of Enrollment indicates which section is the primary section at enrollment time. The class type of Non-Enrollment is used to indicate that the section choice is the student's secondary enrollment option, or that the section is used in auto-enrollment.  
   Within a class, only one component can be type Enrollment. |
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<tr>
<td>14.</td>
<td>The <strong>Associated Class</strong> number is used to link class sections. When a student enrolls in a class, the system verifies that the student has enrolled in a section with all required components of the course with the same <strong>Associated Class</strong> number. If you are scheduling a new section, the system populates the <strong>Associated Class</strong> field with 1 by default. You can manually enter a different value.</td>
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<tr>
<td>15.</td>
<td>The system populates the <strong>Campus</strong> field by default from the <strong>Course Catalog</strong> entry. You cannot override this default. If the <strong>Course Catalog</strong> did not specify a <strong>Campus</strong>, then you must set it here.</td>
</tr>
<tr>
<td>16.</td>
<td>The <strong>Location</strong> field defaults in based on the <strong>Campus</strong> value.</td>
</tr>
<tr>
<td>17.</td>
<td>The <strong>Add Fee</strong> button is used to create a class fee. Consult with the Student Financials office about using this button.</td>
</tr>
<tr>
<td>18.</td>
<td>The system populates the <strong>Academic Organization</strong> field from the <strong>Course Catalog</strong>. The <strong>Academic Organization</strong> refers to the organization that offers the class. You can override this value. The <strong>Academic Group</strong> is populated from the <strong>Catalog</strong> as well. You cannot change that value.</td>
</tr>
<tr>
<td>19.</td>
<td>The system populates the <strong>Holiday Schedule</strong> by default from the <strong>Course Catalog</strong>.</td>
</tr>
<tr>
<td>20.</td>
<td>The system populates the <strong>Start/End Date</strong> fields to the start and end dates of the <strong>Session</strong> chosen. You can override these.</td>
</tr>
<tr>
<td>21.</td>
<td>By default, the system sets the <strong>Instruction Mode</strong> field to &quot;in person&quot; - <em>P</em>. You can override this. Enter the <strong>Primary Instructional Section</strong> number if applicable. This field is specifically used for distance learning classes. You can use this field to indicate in which section the instructor resides. This field is for informational purposes only.</td>
</tr>
<tr>
<td>22.</td>
<td>The setting of the <strong>Schedule Print</strong> check box populates by default to the setting on the <strong>Course Catalog - Offerings</strong> page. Select this check box to display the class in the schedule of classes. If you clear this check box, the section does not display in student or visitor class search when accessed through PeopleSoft Campus Self Service. Students can enroll in these classes, but only if they enter the exact class number (without using the class search feature). Select the <strong>Student Specific Permissions</strong> check box to set up student specific class permissions. Student specific permission numbers enable instructors or administrators to control section enrollment by granting advance permission to individual students. Select the <strong>Include in Dynamic Date Calc</strong> check box to include this component of the class section in the <strong>Dynamic Class Dates</strong> process. The value you select here populates by default from the corresponding field for the course offering component on the <strong>Course Catalog - Components</strong> page. For non-primary components of a course offering, this check box is optional.</td>
</tr>
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</table>
23. The system automatically selects the **Dynamic Date Calc Required** check box whenever you make a change to the class meeting pattern or class dates of a class section within a dynamically dated session because these changes can potentially impact the **Dynamic Class Date** process calculations.

24. Select the **Generate Class Mtg Attendance** check box to indicate that you want the system to always generate attendance rosters for this class. This value defaults from the **Course Catalog - Components** page each time that you schedule a new course. By selecting this check box, you flag the class so that when you generate attendance rosters through the **Attendance Roster Generator** page and you select the **Obey Generate Class Mtg Attendance** check box, the generator creates attendance rosters only for classes that have this flag selected and that meet your processing criteria. If you clear this check box on the **Attendance Roster Generator** page, the system generates attendance rosters for all classes that meet your processing criteria, regardless of the check box setting on the **Basic Data** page. You can generate attendance rosters through the **Class Attendance** page regardless of this check box value.

The UMS Institutions are not currently using the **GL Interface Required** checkbox.

25. Enter a **Course Topic ID** to link course topics to class sections. Select a topic ID for the section. **Topic ID** values are defined on the **Catalog Data** page. If you enter a topic ID, the **Print Topic in Schedule** check box becomes available for entry. The system selects this check box by default.

26. The **Course Equivalent Group** is populated from the Course Catalog. You can override this default.

27. Use the **Class Attributes** field to link attributes to class sections. The system populates this from the **Course Catalog**, but you can override the defaults and add more.

28. Click the **Meetings** link.

29. Use the **Meetings** page to define class meeting patterns and facilities, link instructors to classes and specify room characteristics.

30. Enter a **Facility ID** if desired. If you use the lookup button (magnifying class icon) you will see a list of facilities for your Institution.

31. Enter the desired information into the **Pattern** field. Use the lookup button to see pre-defined patterns for the Institution and Academic Group of the course section.

**Note.** It is important that you enter the most important meeting pattern first. In some places in the system when viewing classes you can only see the meeting pattern which was entered first. Also, the system assigns a final exam code based on the first class meeting pattern.

32. The system selects the meeting days based on the meeting pattern you selected. You can also select the meeting days manually.

33. Enter the desired information into the **Mtg Start** field.

34. Click in the **Mtg End** field. Clicking (or pressing Tab) will automatically fill in the meeting end time. You can override this time entry.
35. You can use the Add a New Row button to add more meetings for this class section.

The system populates the Start/End Date fields automatically for the first meeting, based on the start and end dates of the Session. For additional meetings the default comes from the start and end dates you set on the Basic Data page.

36. Select a class Topic ID for this class meeting pattern. Enter a Free Format Topic if a predefined topic ID does not suit your purposes.

Select the Print Topic On Transcript check box for the system to print the class meeting pattern topic, along with the class name, on transcripts.

37. In the Instructors section of the page, enter the ID of the instructor for the course. You can set the Instructor Role and Access level. Add additional instructors by clicking the Add a New Row button.

The UMS Institutions are not currently using Instructor Workload.

38. Use the Room Characteristic field to link room characteristics to classes. The system populates the Room Characteristic field and the Quantity field from the Course Catalog - Components page. You can override these values. The Room Characteristic field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum Quantity of room characteristics for Schedule25 is 96. Therefore, be sure that you select values between 01 and 96.

39. Click the Enrollment Cntrl tab.

40. Use the Enrollment Control page to set enrollment limits and capacity requirements, and to identify sections for which you want the system to auto enroll students.

41. The system populates the Class Status field to Active by default. You can override the status to indicate Stop Further Enrollment, Cancelled Section, or Tentative Section. The Schedule of Classes report enables you to select class status, so that you can print only Active classes, or only Inactive classes, and so on.

Note: When you select Stop Further Enrollment, Cancelled Section, or Tentative Section, the system sets enrollment status to closed. Classes with class statuses of Stop Further Enrollment, Cancelled Section, or Tentative Section, do not appear in class search.

42. Click the Cancel Class button to cancel the class in view. The class status must be Canceled Section. The button processes one section cancellation at a time. If you want to cancel multiple sections, you must post your request for each section that you want to cancel.

Note: If you want to cancel the section regardless of whether students are enrolled, you must select the Cancel if Student Enrolled check box. Doing so, however, drops any students who are enrolled in the section and requires that you recalculate tuition for those students.
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|43. | The system populates the **Consent** field by default from the **Catalog Data** page indicating the type of consent (if any) required for students to enroll in the class. You can override the value.  

*No Consent* means no permission is required to enroll.  
If you select Instructor (**Inst Cnsnt**) or Departmental (**Dept Cnsnt**), consent is granted either by entering the permission number or using the Override Permissions check box on the Enrollment Request page.  
Select the **Student Specific Permissions** check box on the **Basic Data** page to be able to specify permission by student ID on the **Class Permission Numbers** page.|
|44. | Enter the desired information into the **Requested Room Capacity** field.  
Your room capacity can be different than your enrollment capacity. Because the system stores two separate capacity values, this field enables you to manipulate the enrollment capacity without affecting room scheduling. The system populates the Requested Room Capacity field by default from the default section size on the Course Catalog - Components page. This field is useful for you especially if you use Universal Algorithm’s Schedule25 software.|
|45. | Enter the desired information into the **Enrollment Capacity** field.  
46. | Enter the desired information into the **Minimum Enrollment Nbr** field.  
This is the minimum enrollment for the section to be offered. If the minimum enrollment number is not realized you might decide to cancel the section. This field is for informational purposes only.  
47. | In the **Total** field, the system displays the current total of students enrolled and on the wait list for the section.  
48. | Select **Auto Enroll from Wait List** to enable the **Wait List** process to move students from the wait list to enrolled status when a space opens up in the section.  
Spaces become available through enrollment drops or an enrollment capacity increase. Generally, when spaces become available in a section, the class status opens, allowing students to enroll. However, selecting this check box keeps the status closed so that you have time to move students from the wait list into the class by running the wait list process (before other students enroll).  
If you do not select the **Auto Enroll from Wait List** check box and you have students on the wait list for the class, when the class status changes to open you cannot use the wait list process to move students from the wait list into the class.  
You have to move wait listed students into the class manually, and students that are not on the wait list will be able to enroll in the class.  
49. | Enter a section within the same associated class number in which the system should automatically enroll students into the **1st Auto Enroll Section** and **2nd Auto Enroll section**.  
The auto enroll section must have a different component from the parent section.  
50. | In the **Resection to Section** field, enter the alternative section in which the system automatically enrolls a student if the primary section is full.  
The component of the primary section and the resection to section class must be the same. For instance, when Section 1 Lecture is filled, the system enrolls students in Section 3 Lecture.  

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**Date Created: 10/5/2007**
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<th>Step</th>
<th>Description</th>
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<td>51.</td>
<td>Click the <strong>Reserve Cap</strong> tab.</td>
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| 52.  | Use the **Reserve Capacities** page to assign reserve capacities for class sections.  
      Reserve capacities are enrollment requirement groups that set aside a certain number of seats  
in a class section for students who meet certain criteria such as academic level, cumulative  
GPA, or number of units earned. |
| 53.  | The system creates the **Reserve Capacity Sequence** number indicating the order in which it  
evaluates the sets of requirement groups during enrollment. You can change this number.  
The **Enrollment Total** is the total number of students enrolled as part of the reserve capacity  
sequence. |
| 54.  | To reserve seats for a specific group of students specify a **Requirement Group**.  
In the **Start Date** field, enter the effective date for your reserve capacity. This date determines  
when the enrollment capacity requirement group becomes active.  
Select the **Requirement Group** for the reserve capacity. Students who attempt to enroll in the  
class and who satisfy the reserve capacity requirement group that you specify will be  
permitted to enroll in the class up to the **Cap Enrl** value, (so long as the enrollment does not  
exceed the total enrollment capacity that you specify on the Enrollment Control page).  
To add additional **Requirement Groups**, use the **Add a New Row** button to add a row. |
| 55.  | Click the **Notes** tab. |
| 56.  | Use the **Notes** page to attach existing class notes or free-form text notes to class sections.  
Class notes are printed in the **Schedule of Classes** to provide students with information on the  
class.  
The system creates a class notes **Sequence Number**. The number determines the display order  
of the class notes for a section if there are multiple notes. You can override this number. |
| 57.  | Select the **Print Location** of the note, either **Before** the class listing, or **After** it.  
Select a **Note Number** to reference a preexisting note or type in free format text in the **Free  
Format Text** field. |
| 58.  | Click **Copy Note** to copy the note number text to the free format text. The note can then be  
modified to accommodate the class section. This eliminates the note number and note text.  
If you enter a free format note, you can clear the field using the **Clear Note** button. |
| 59.  | Click the **Exam** tab. |
| 60.  | Use the **Exam** page to manually schedule exam times for the class sections.  
Note that final exam assignments can also be made via a batch process. |
<p>| 61.  | Enter the desired information into the <strong>Exam Date</strong> field. |
| 62.  | Enter the desired information into the <strong>Exam Start</strong> field. |</p>
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<td><strong>63.</strong></td>
<td>This completes the set up for the first class section. Repeat steps 11-62 for any remaining sections.</td>
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<td><strong>64.</strong></td>
<td>Once all required data has been entered for the class sections, be sure to click the <strong>Save</strong> button to save your work.</td>
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<tr>
<td><strong>65.</strong></td>
<td><strong>End of Procedure.</strong></td>
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