Update the Schedule of Classes for a New Term

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Each Term classes are “rolled over” from the previous year in PeopleSoft (Fall 2009 will be rolled into Fall 2010). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it. The first step is to print an MS Review (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the Schedule of Classes to reflect any changes for the new Term. Perhaps the instructor for a class has changed or the class is being held in a different room or more sections of a course were added.

**Navigation:**

**Curriculum Management > Schedule of Classes > Maintain Schedule of Classes**

If a course was not offered in the Term that was “rolled over” then it will not be in the new Term. This course will have to be added as a “New Course” for this Term. This is done in the Schedule New Course component:

**Curriculum Management > Schedule of Classes > Schedule New Course**
### Basic Data

- **Course ID:** 201035
- **Academic Institution:** SUNY at Stony Brook
- **Term:** Fall 2008
- **Subject Area:** ECL
- **Catalog Nbr:** 191
- **Title:** Introduction to Poetry

#### Class Sections

- **Section:** A
- **Class Section:** 01
- **Component:** LEC
- **Class Type:** Enroll
- **Associated Class:** 1
- **Campus:** WEST

#### Instructions

- **Previous/Next arrows (or View All):** Click to view each section of this course.
- **Add a new row:** Click to add a new section to this course for this Term.
Edit the fields for each section as needed:

**Session:**
Make sure that you have the correct Session code selected. The Session code is used to further break down the Term. It is needed to accommodate the Summer Session and HSC Mods (i.e., A = Full Fall Semester Session, B = Full Spring Semester Session, Mod 4, Mod 5-7 U, etc.).

**Class Section**
Each section is assigned a code as follows:

- **LECTURE**: 01, 02, 03, etc.
- **RECITATION**: R01, R02, R03, etc.
- **LABORATORY**: L01, L02, L03, etc.
- **SEMINAR**: S01, S02, S03, etc.
- **TUTORIAL**: T01, T02, T03, etc.
- **SUPERVISED**: V01, V02, V03, etc.
- **CLINICAL**: C01, C02, C03, etc.
- **ONLINE**: 30, 31, 32, 33, etc.
- **MANHATTAN**: 60, 61, 62, 63, etc.
<table>
<thead>
<tr>
<th><strong>Class Number:</strong></th>
<th>Each section of a course is automatically assigned a Class Number. If you add a new section this number will be assigned after you save.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start/End Date:</strong></td>
<td>These dates default from the Academic Calendar.</td>
</tr>
<tr>
<td><strong>Component</strong></td>
<td>Some courses have more than one component (lecture, recitation, seminar, tutorial, etc.). Valid components for this course have already been set up in the Course Catalog. Click the LOOKUP button (magnifying glass) to choose the component for this section.</td>
</tr>
<tr>
<td><strong>Class Type</strong></td>
<td>Select <strong>Enrollment</strong> or <strong>Non-Enrollment</strong>. For auto-enroll courses with more than one component the component that the student must enroll in is set to <strong>Enrollment</strong> and the component that the student gets automatically enrolled in is set to <strong>Non-enrollment</strong>. For instance for courses with a Lecture and Lab, the Lab may be the <strong>Enrollment</strong> component and the Lecture may be the <strong>Non-Enrollment</strong> component.</td>
</tr>
<tr>
<td><strong>Associated Class</strong></td>
<td>The main purpose of this field is to associate multi-component courses. For single component courses - the Associated Class number is the same as the Section number without the zero (i.e., Lecture 01 is Associated Class “1”). <strong>For multiple component courses</strong> - all of the Lectures are assigned Associated Class “9999” and the other components (Recitations and Labs) are assigned the same as the Section number without the zero as stated above (i.e., Lab 01 is Associated Class “1”).</td>
</tr>
<tr>
<td><strong>Campus</strong></td>
<td>Defaults to the campus where the course is held (West, HSC, Southampton, Manhattan, SUTRA (SPD)).</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Select West Campus, Southampton Campus, Off Campus, International Academic Program or Online.</td>
</tr>
<tr>
<td><strong>Course Administrator</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Academic Organization:</strong></td>
<td>Defaults to the department offering the course. Do not change.</td>
</tr>
<tr>
<td><strong>Academic Group</strong></td>
<td>Defaults to the department’s College or School. Do not change.</td>
</tr>
<tr>
<td><strong>Holiday Schedule</strong></td>
<td>Defaults to Academic Holidays or HSC Academic Holidays.</td>
</tr>
<tr>
<td><strong>Instructor Mode</strong></td>
<td>Defaults to “In Person”. If this is an online class you should select “World Wide Web”.</td>
</tr>
<tr>
<td><strong>Primary Instr Section</strong></td>
<td>Defaults to the Section number.</td>
</tr>
<tr>
<td><strong>Add Fee:</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Schedule Print:</strong></td>
<td>Indicates whether the class should be printed in the Class Schedule and MS Review report and appear in SOLAR.</td>
</tr>
<tr>
<td><strong>Student Specific Permissions</strong></td>
<td>When this option is checked, the department has the ability to issue permission for students to enroll in the class if it’s full or if they don’t meet certain pre-requisites.</td>
</tr>
<tr>
<td><strong>Include in Dynamic Date Calc</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Dynamic Data Calc Required</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Generate Class Mtg Attendance</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Sync Attendance with Class Mtg</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>GL Interface Required</strong></td>
<td>Not used.</td>
</tr>
<tr>
<td><strong>Course Topic ID</strong></td>
<td>If this is a course with different topics select the topic for this section by clicking the <strong>LOOKUP</strong> button. Setting up the Topic here will allow the Topic Title to print in the Class Schedule and on student transcripts. You can have multiple topics for different sections of a single course in one semester. This is especially useful for graduate courses. If the topic you want isn’t listed contact the appropriate Dean’s Office and ask them to add the topic title to the Course Catalog, so you can schedule it.</td>
</tr>
<tr>
<td><strong>Course Equivalent Course Group</strong></td>
<td>Displays the course equivalents.</td>
</tr>
<tr>
<td><strong>Course Attribute</strong></td>
<td>Select the value only if applicable to your classes otherwise leave blank (i.e., Study Abroad/Exchange Courses, Contract Course, SPD, PEP, etc.).</td>
</tr>
</tbody>
</table>
Meetings

This is where you assign the room, meeting days/times and instructors for the class.

**IMPORTANT!** If this is a course that is combined with other courses you cannot update the Meetings page here. You must go to the Schedule Class Meetings page (Curriculum Management > Schedule of Classes > Schedule Class Meetings). The courses must be “linked” by the Registrar’s Office first!

CASA (Course and Section Analysis) data are derived from the Course Catalog and the Meetings page therefore the completion of accurate information on this page is essential. Instructors should be assigned right away. Other information on the Meetings page is opened for CASA editing after the enrollment snapshot.

### Facility ID

You can only select a room that is controlled by your Department or a large room that’s been assigned to you for the class. Otherwise, leave this field blank and the room will be assigned by the Registrar’s Office.

If you don’t know the Facility ID number, click the LOOKUP button and search for it by entering the **Building number** and **Room number**. Be careful, this list contains every closet, stairwell and bathroom in the building!
Pat

Select the day of the week pattern (MWF, TUTH, etc.). The meeting end time will default from the pattern that you pick.

For Recitation sections – use the meeting pattern code that begins with “RE” only. These are 55 minute meeting time blocks.

For Tutorial sections – use “APPT”.

For sections where hours are to be arranged – select “HTBA”.

Mtg Start

Enter the time that the class starts (remember to include AM and PM appropriately)

Mtg End

The class end time will default from the day of the week pattern and Start Time that you selected.

Note: Tutorial, Clinical, Supervised teaching, and distance-learning sections are entered with the default of 1:00 a.m. to 1:00 a.m.

Combined Sections

Combined sections have to be setup in advance by the Registrar’s Office. You cannot schedule a class until this is done. You will see the Combined Sections link on this page once the Registrar’s office has linked the courses. Click it to see the Combined Section Detail.

New course combinations must be approved by the Dean’s office first.

Remember…after the combined sections have been linked by the Registrar’s office the fields on this page will be grayed out. You must go to the “Schedule Class Meetings” page to update the information on this page.

If you have questions about combined sections contact the Registrar’s Office.

ID

Enter the instructor’s Stony Brook ID.

IMPORTANT! To remove an existing instructor ID you must delete the entire row by clicking the Delete Row ( - ) button. Then you can add the new instructor’s ID.

If you do not know the ID number, click the LOOKUP button and search for the instructor by First name and Last name.
Note: If the field turns red or the instructor is not in the list you must check the Instructor Advisor table.

- Your dept must be in the list of approved courses for the Instructor
- New instructors must be active (hired) in PeopleSoft at least one day before the start of the Term

To add another instructor for this class click the Add a New Row button.

Instructor Role

Select this instructor role.

The data that is entered here is used for determination of instructional workload in CASA and other institutional reporting. For the most accurate university reports, please adhere to the revised rules below.

| **Primary Instructor** | Should be assigned to the instructor who is fully responsible for the course based on the course instruction or contact minutes. Most often the Primary Instructor should be a faculty member, however, a graduate student can be the Primary Instructor if the graduate student is solely responsible for the scheduled course.

For multi-component courses, assign the instructor a role of Primary Instructor on the lecture and “supervisor” on the additional sections (eg., lab, recitation). This provides the ability for departments to allow grading access for the primary instructor for the additional sections.

For multi-component courses, do NOT assign the instructor a role of Primary Instructor on the lecture and “Primary Instructor” on the additional sections (eg., lab, recitation) unless that same instructor is fully responsible for those sections.

In the instances where teaching responsibility is shared between more than one instructor, indicate a maximum of ONE Primary Instructor based on the course |
<table>
<thead>
<tr>
<th>Instructor Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Secondary Instructor</strong></td>
<td>In the instances where teaching responsibility is shared between more than one instructor, indicate ONE Primary Instructor based on the course contact minutes and one or more Secondary Instructors. Note that the abbreviation “sec instr” is not intended to stand for “section instructor,” and should not be applied as such.</td>
</tr>
<tr>
<td><strong>Administrator</strong></td>
<td>This instructor role is not reported in CASA, however, correct setup is vital for grading access of the instructor(s). This role is useful when a course instructor has arranged for a department administrator (usually the ATC or similar) to administer the course (submit grades, manage rosters, etc). In these cases, the primary instructor remains on the course, and a course administrator is assigned a role of &quot;admin&quot; plus the appropriate level of grading access.</td>
</tr>
<tr>
<td><strong>Supervisor</strong></td>
<td>This instructor role is not reported in CASA, however, correct setup is vital for grading access of the instructor(s). Use this for a course with multi-components (eg., lecture/lab + recitation). The instructor (usually Faculty) should be assigned to the lecture as &quot;primary instructor&quot; and as the &quot;supervisor&quot; for each of the labs and/or recitations.</td>
</tr>
<tr>
<td><strong>Reader/Grader</strong></td>
<td>Assign this role for Graduate students who read/grade papers and don’t actually meet with students. For CASA reporting purposes, do not add hours for these.</td>
</tr>
</tbody>
</table>

**Print**

If you want the instructor to appear in the Class Schedule and in SOLAR Class Search for this class,
check this box. **Supervisors, Administrators and Reader/Graders should never be printed!**

**Access**

Select the instructor’s level of access to rosters and submitting grades in SOLAR. **Only one person per class can have Approve access (usually the Primary Instructor, Secondary Instructor or Supervisor)!** TA’s, Administrators and Reader/Graders should not have Approve access.

<table>
<thead>
<tr>
<th>Access</th>
<th>View Roster</th>
<th>Input Grades</th>
<th>Submit Grades</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Grade</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>None</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

**Workload**

Not used.

**Contact**

In general, departments do not have to enter contact minutes. Contact minutes are calculated from section start and end times and entered automatically for CASA reporting.

**Room Characteristic**

Not used.
Enrollment Control

This page is used to indicate the class status, enrollment and waitlist capacities for classes.

Classes will “roll” from the previous year with the Class Status from that year. So a class that was inactive last Fall is going to have a status of inactive this Fall too. Remember to check the Class Status for every class when you begin scheduling for a new Term!

Class Status

If this class is going to be offered, make sure the Class Status is ACTIVE.

If the class is not going to be offered this Term, change the Class Status to INACTIVE. Remember to also set the Enrollment Capacity to “0”. Do not delete the class. You may want to use it at a later date.

If you want to tentatively schedule a class that you are pretty sure you’ll be offering, change the Class Status to TENTATIVE SECTION.

Generally classes are only CANCELLED after you’ve lost the ability to update courses. This option will be used by the Registrar’s Office.

Consent

Department or Instructor indicates that the student needs department or instructor permission to register for this class. No Consent indicates that the student can
register without permission. If this is incorrect contact the Registrar’s Office.

1st Auto Enroll Section
2nd Auto Enroll Section
Resection to Section

These fields are used to associate multi-component sections for auto-enroll. No entry is required on this page. You will use the Update Sections of a Class page to do this. It’s easier.

Auto-Enroll from Waitlist

This option will be checked for courses that allow wait listing. Students who elect to be placed on the waitlist will automatically be enrolled as seats become available. You will be able to view the list of students on the waitlist. You will also be able to get an “unmet demand” report of students who tried to register, could not get in, and chose NOT to be put on the waitlist.

Requested Room Capacity

Enter the maximum enrollment that you will ever allow for this class. Please be realistic!

Enrollment Capacity

This is the maximum number of students allowed to register for this class. You can change it if needed. This number should not be greater than the Requested Room Capacity.

For Inactive classes - change this number to “0”.

For multi-component classes with auto-enroll - make sure that the enrollment capacity for the Lecture equals the total enrollment capacity of all of the associated “enrollment” sections (Recitations or Labs).

For combined courses – this number should equal the total number of students allowed to enroll in both classes combined.

Waitlist Capacity

This number should be approximately 30% of the enrollment capacity.

Minimum Enrollment Number

Not used.

Cancel if Student Enrolled

Not used.

Once students begin enrolling in classes you can refer to this page to see the Total Enrollment Capacity and the Total Waitlist Capacity. These are actual real-time numbers. You will also find this information on the Class Sections page.

<table>
<thead>
<tr>
<th>Enrollment Status: Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Room Capacity: 570</td>
</tr>
<tr>
<td>Enrollment Capacity: 480</td>
</tr>
<tr>
<td>Wait List Capacity: 0</td>
</tr>
<tr>
<td>Minimum Enrollment Nbr:</td>
</tr>
</tbody>
</table>

Total: 329
RESERVE CAPACITY and WAITLIST are two of the most valuable ways for controlling who gets into your classes.

WAITLIST sets up an automatic waitlist for students interested in getting into the class if a seat opens up. (Note: If you’re screening for prerequisites for the course, only students who have satisfied the prerequisite will be able to add to the waitlist.). Waitlist is not in place for all departments. If you are interested, contact the Registrar’s Office.

RESERVE CAPACITY allows you to reserve seats in the class for particular groups or classes of students. Typically you’ll want to reserve seats for students in your major, or seniors, or seniors in your major.

Click the **Add a New Row** button here to add more than one reserve group.

Click **View All** to view all Reserve Capacity Sequence numbers.

Only **Add a New Row** here if you want to inactivate an existing group as of a specific date.

For instance, put the date that you want to inactivate the group and set the Cap Enrl to “0”.
Reserve Capacity Sequence

A Reserve Capacity Sequence number is added each time you insert a new row. If you have more than one Requirement Group for a class, this number determines which Requirement Group has priority. If a student meets the requirements of 2 different groups, he/she will be put into the one with priority (1 before 2, 2 before 3, etc.).

Enrollment Total

This number tells you how many students are currently in each reserve capacity sequence.

Start Date

The Start Date will automatically be set for the beginning of advance registration for the Term. This date is very important! Only change it to activate or inactivate a reserve group on a specific date other than the beginning of advance registration.

Requirement Group

Requirement Groups have been setup in PeopleSoft and are identified by a Requirement Group number. Think of this as the requirements needed in order to fill this group of seats.

Click the LOOKUP button to see list of Requirement Groups. You can search by Academic Group or Subject Area.

Examples of Requirement Groups:

U1 = Freshman
U2 = Sophomores
U3 = Juniors
U4 = Seniors

AFS MAJOR/MINOR will allow you to reserve seats for students majoring or minoring in Africana Studies.

AFS MAJOR will allow you to reserve seats only for students majoring in Africana Studies.

AFS MINOR will allow you to reserve seats only for students minoring in Africana Studies.

AFS U4 MAJOR will allow you to reserve seats only for seniors majoring in Africana Studies.

Cap Enrl

Enter the number of seats you want to reserve for this group of students. If you inactivate a group change the Start Date and set the Cap Enrl to “0”.

You can have more than one Requirement Group for a class:

Notice that there are two areas on this page where you can insert/delete rows. Be careful!

Click the scroll arrows or View All to see each Requirement Group Sequence.

To add a Requirement Group:

- Click in the Reserve Capacity Sequence field and click the Add a New Row button to the right of this field.
- A new sequence number will be assigned to each group that you add in order of priority.
• Select the **Requirement Group** and **Cap Enrl**.

**To delete a group:**

- Scroll to the correct **Reserve Capacity Sequence** number by clicking the Next/Previous row buttons
- Click the **Delete Row** button to the right of the **Reserve Capacity Sequence** field.

**If you want to make a certain group “Inactive” after a certain date:**

- Scroll to the correct **Reserve Capacity Sequence** number by clicking the Next/Previous row buttons
- Click in the **Start Date** field
- Click the **Add a New Row** button to the right of the **Start Date** field
- Enter the **date that you want this group to be inactivated** in the **Start Date** field
- Select the same **Requirement Group**
- Enter “0” for the **Cap Enrl**
Notes

The class Notes page include special information about the class that may or may not be printed in the Class Schedule (i.e., information about exams, waitlists, reserve groups, combined courses, auto-enroll sections, etc.). Department Schedulers cannot add/change Notes. They must contact the Registrar’s Office.
The LMS fields must be completed in order for the classes to be available in Blackboard.

Click the drop down list for **LMS Extract File Type** and choose **XML V1.1 (req to authenticate)**

The **LMS Extract Group ID** will automatically be completed when you tab out of the LMS Extract File Type field.
SAVE

You should save after each section that you update.

To add a new section for this course go back to the Basic Data page and click the Add a New Row button. Complete all of the information for the next section. Remember to save after completing each section.

If this is a multi-component Course with auto-enroll, when you are finished scheduling each section go to the Update Sections of a Class page to complete the auto-enroll section information (see instructions on following pages).

To check to see if Pre-requisite screening is turned on or off for each section of this course go to the Adjust Class Associations page.

To remain in this component and search for another course, click the Return to Search button.
Manage Auto-Enroll Sections, Enrollment and Waitlist Capacity

**Navigation:**
Curriculum Management > Schedule of Classes > Update Sections of a Class

You can easily view information for all of the sections of a course on one page. Please note that only 8 rows are displayed at a time on this page. To see all of the rows on one page you must click **View All**.

You will complete your scheduling for the auto-enroll courses here. In the **Auto Enrl 1** enter the section number of the Lecture that students will auto-enroll into when they register for each of the Lab or Recitation sections.

![Update Sections of a Class](image)

Click the **SAVE** button to save the information that you entered.
Also use this page to edit Enrollment Capacity and Waitlist Capacity for existing classes.

Once students begin enrolling in classes, use this page to view Enrollment and Waitlist Totals.

Click the SAVE button to save the information that you entered.