Student Administration

Training Guide

Scheduling

Table of Contents

1 – Buildings & Facilities

A user can find out information about buildings and rooms on campus by accessing these tables:

1. **Building Table**
    This displays a list of buildings on Campus.

2. **Facility Table**
    This displays each Facility/Room and the associated characteristics of each facility within buildings on campus.

3. **Room Characteristic Table**
    Room Characteristics refer to built-in features, such as network connections and overhead projectors.

4. **Classroom Search Tool**
    This tool offers detailed information about all general assignment rooms (centrally-scheduled rooms).

These tables are maintained by the Scheduling Office. There is view only access for Department and Faculty schedulers.

Building Table

This is the list of buildings on Campus. Only when a new building has opened for scheduling use will it be added to the Student Administration System.

Navigation:

► Breadcrumbs
Set Up SACR > Foundation Tables > Facilities > Building Table

Building Table

Building Table

Building:	ST						
				Find | View All	First ◄ 1 of 1 ► Last		+ −
*Effective Date:	1901/01/01	Status:	Active				
*Description:	Science Theatres						
*Short Description:	ST						

Facility Table

This is the list of facilities (rooms) with associated room characteristics within buildings.

Navigation:

► **Breadcrumbs**
Set Up SACR > Foundation Tables > Facilities > Facility Table

Facility Table

Stored in this table is general information about a facility, such as building, room number, location, facility type, capacity, etc.

Facility Characteristic

Facility Characteristics refer to specific features of a room that may be necessary for a certain type of presentation. Examples include Blackboard, Tiered Seating, Variable Light (Dimmer Switch), Whiteboards etc. **Note:** Click View All to see all characteristics.
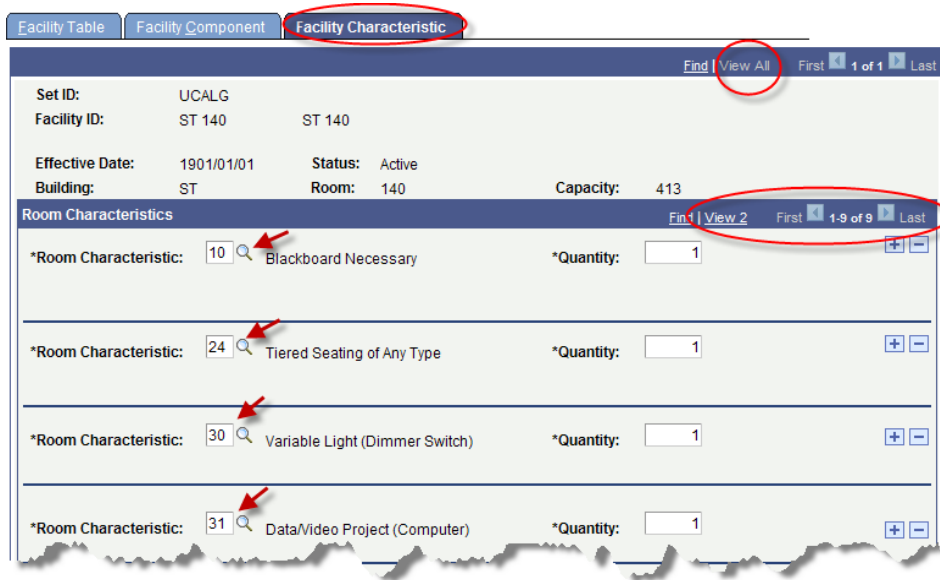
Room Characteristic Table

This table contains the list of possible Room Characteristics and can be used to find the description for the characteristic.

► Breadcrumbs
Set Up SACR > Foundation Tables > Facilities > Room Characteristic Table

Room Characteristic Table
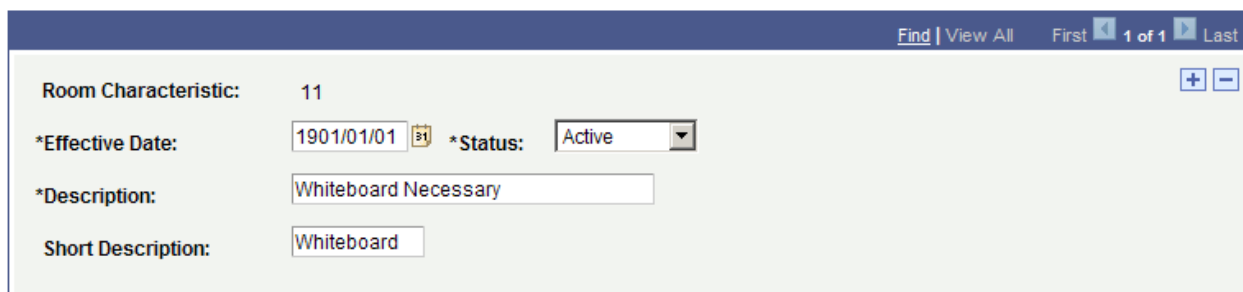
Classroom Search Tool (Calendar-Scheduling Webpage)

Select criteria in the Search Tool below to find out more about University of Calgary instructional spaces. Click on the Room Number of each space to see more information, including photos.

Click on the Interactive Room Finder URL to locate each space on campus: http://www.ucalgary.ca/calendar-scheduling/classroom-search-tool

Classroom Search Tool

Campus	Building Name	Capacity	Chair Type
Main ▾	- Any - ▾	- Any - ▾	- Any - ▾

Desk Type	ComMedia	Search
- Any - ▾	- Any - ▾	

Select any filter to see results

2 – Instructors

Prior to the Schedule of Classes being created, each Academic Organization will need to update/create a list of available instructors. This allows the Department/Faculty schedulers to select an instructor from that list for their specific classes.

1. **Search/Match**

Prior to adding an instructor to the system it is critical to complete a check see if the person already exists in the Student Administration System. This is check is completed using Search/Match.

2. **Instructor/Advisor Table**

By associating instructors to the Academic Organization(s) in which they teach, Department and Faculty schedulers will have a filtered list when assigning instructors to classes.

Search/Match

Prior to adding an individual to the database, it is _imperative_ the Search/Match process be completed to check to see if the person already exists in the database to prevent the creation of duplicate ID's.

Important Note: The process for merging duplicate ID's is manual and **very** labor intensive. Search/Match must **always** be performed.

Search/Match can be accessed from a number of components in PeopleSoft:

Campus Community > Personal Information > Search/Match
Campus Community > Personal Information (Student) > Search/Match
Student Admissions > Application Entry > Search/Match

Navigation:

► Breadcrumbs (For this example we will use the following Navigation):
Campus Community > Personal Information (Student) > Search Match

Search/Match uses a combination of **Search Type** and **Search Parameter** to search the database for a person or organization.

Search/Match

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300
Use Saved Search: [▼]

Search Type: [= ▼]   [Person   ▼]
Search Parameter: [begins with ▼]
                               Job Applicant
Ad Hoc Search   Organization
Description: [begins with ▼] Person

[Search] [Clear] Basic Search 🖫 Save Search Criteria Delete Saved Search

Search Results

View All			First ◄ 1-5 of 5 ► Last
Search Type	**Search Parameter**	**Ad Hoc Search**	**Description**
Org	UCSA_ORG	N	SA Organization Search
Org	UCSA_ORG_AD_HOC	Y	SA Organization Ad Hoc Search
Person	PSRS_HIRE	N	Prepare For Hire
Person	UCSA_AD_HOC	Y	SA - Ad Hoc Search (Person)
Person	UCSA_BASIC	N	Student Admin Basic Search

◇ **Notes:**

►Select the type of Search you wish to perform.

►Select 'Person' from the list of choices in the Search Type drop down list.

►Click the Search button to display the Search Parameters.

The types of searches that display are based on the security assigned to you. Schedulers with the appropriate Timetabling role can perform either the Student Admin Basic Search or the SA-Ad Hoc Search (Person).
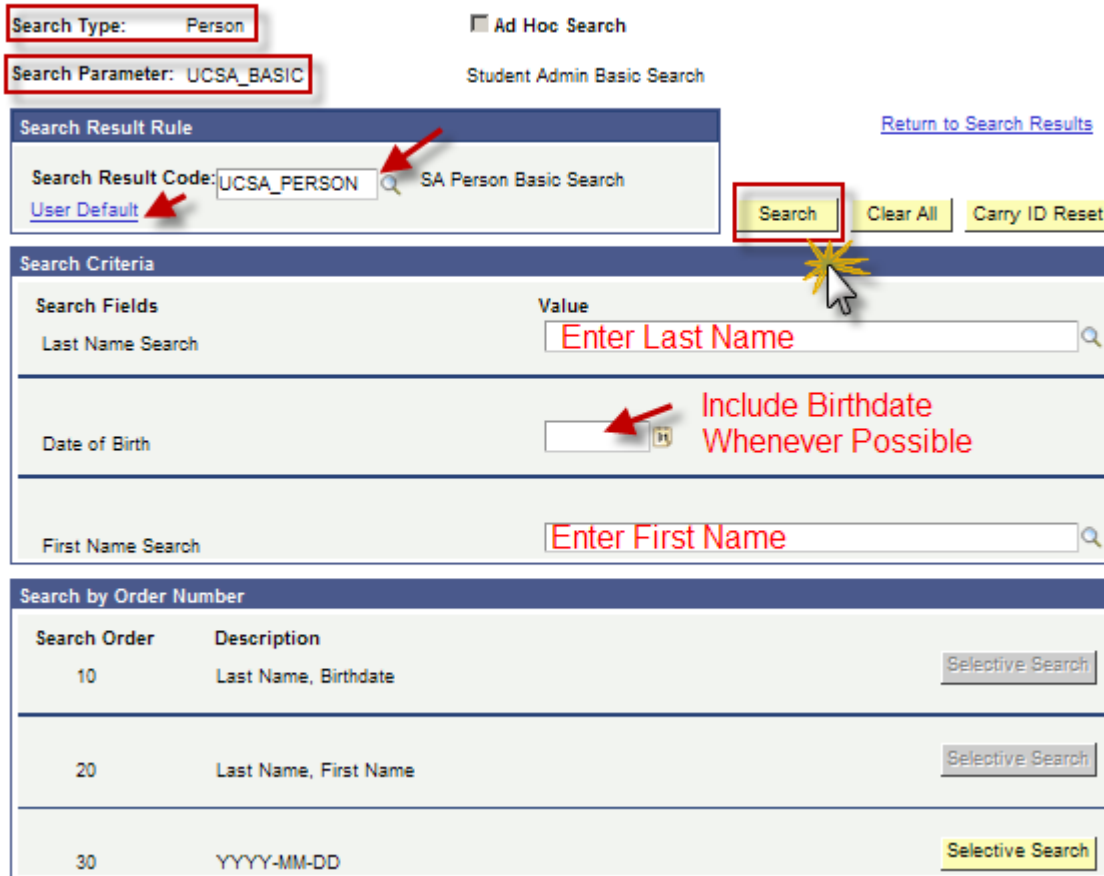
Student Admin Basic Search - you must know specific information about the person; last name, first name and/or birth date.

SA - Ad Hoc Search (person) – this search is based on the information you have available.

Basic Search

In order to perform the Basic Search, specific Search Criteria is required.

◇ **Notes:**

►Click the User Default link to default the Search Results Code. Once the Search Results Code is set, the code automatically displays when you return to this page.

►The Basic Search requires the Last Name (*the full last name must be entered*), First Name (*the full first name must be entered*) and/or birth date.

►Click the Search button.

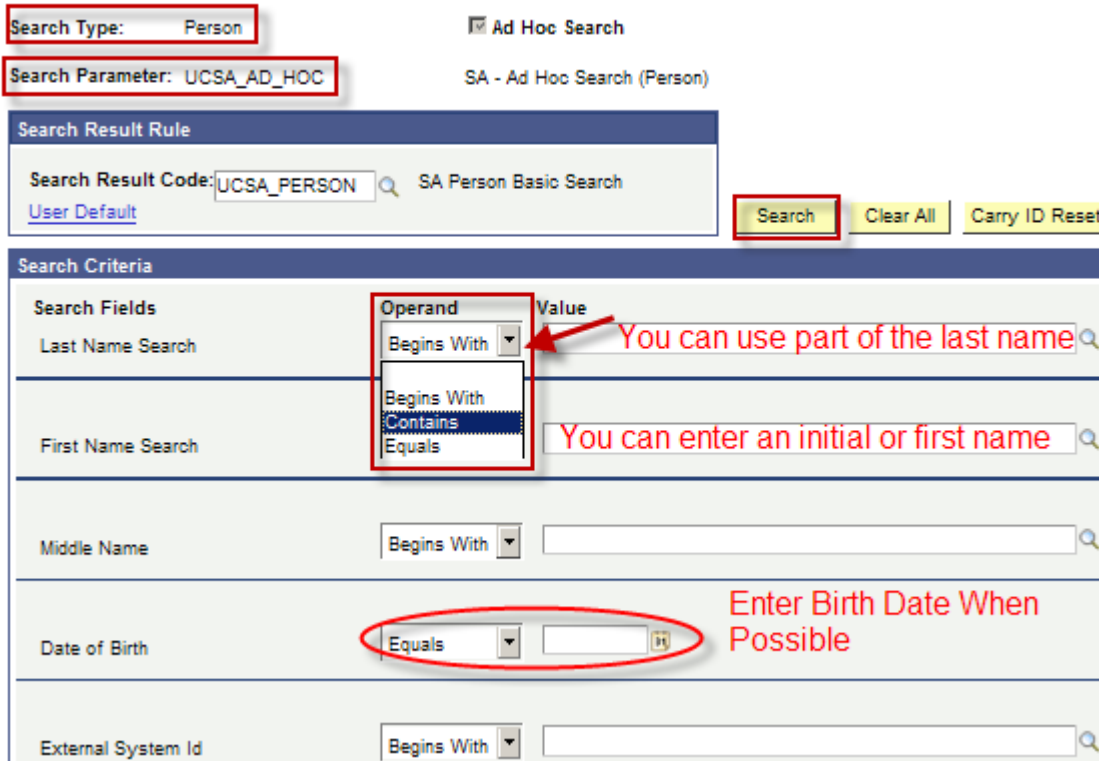## Basic Search - Search Results

Results

Results2

**Notes:**

►Carry ID auto populates the emplid field

►External System ID is the Alberta Student Number

Ad Hoc Search

The Ad Hoc Search provides some flexibility in the Search/Match process as this search is based on the information you have available. To make the search as effective as possible, you should define the search by entering as much search criteria as possible. *Again, entering the birth date of the individual is strongly encouraged.*

✧ *Notes:*

►Enter the information you have available; Last Name, First Name, Middle Name, Date of Birth or the External System ID (*Alberta Student Number*).

►The Operand field enables you to perform a search that "begins with", "contains", or "equals" the search value that you enter.

►Names converted by Human Resources do not necessarily contain the full middle name. Often this field was populated with initials (first name/surname) and therefore if a middle name is specified, a valid match may not be found. Therefore for an initial search, do not to specify a middle name.

►Click the Search button.

Ad Hoc Search - Search Results

Results

Search Results

Search Type:	Person	☑ Ad Hoc Search
Search Parameter:	UCSA_AD_HOC	SA - Ad Hoc Search (Person)
Result Code:	UCSA_PERSON	SA Person Basic Search

▼ Search Results Summary   Return to Search Criteria

Number of ID's Found: 1

Search Order Number: 10   SA - Person AD HOC Search

Search Results   Customize | Find | View All | 🗗   First ◄ 1-2 of 2 ► Last

Results	Results2	Additional Information	

		Empl ID	Student Career	Date of Birth	Last Name	First Name	Middle Name
1	Carry ID	00█████	UGRD	1976/█████	████	████	
2	Carry ID	00█████	UGRD	1976/█████	████	████	

Results2

Search Results

Search Type:	Person	☑ Ad Hoc Search
Search Parameter:	UCSA_AD_HOC	SA - Ad Hoc Search (Person)
Result Code:	UCSA_PERSON	SA Person Basic Search

▼ Search Results Summary   Return to Search Criteria

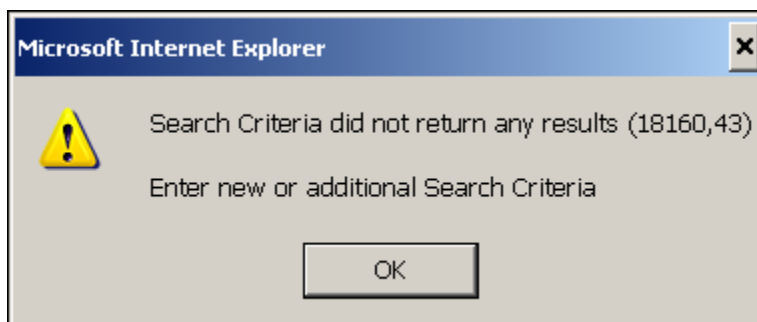Number of ID's Found: 1

Search Order Number: 10   SA - Person AD HOC Search

Search Results   Customize | Find | View All | 🗗   First ◄ 1-2 of 2 ► Last

Results	Results2	Additional Information	

		Empl ID	Name Type	External System ID	Name Effective Date	Emplid Type	Alternate ID
1	Carry ID	00█████	DEG		1901/01/01	Student	
2	Carry ID	00█████	PRI		1901/01/01	Student	

Important Note:

If no 'Search Results' are returned, the message below will display.

Microsoft Internet Explorer

⚠ Search Criteria did not return any results (18160,43)
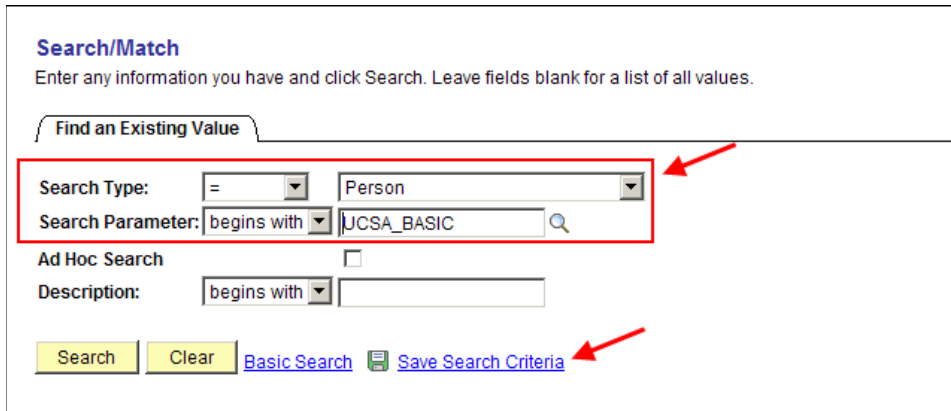
Enter new or additional Search Criteria

[OK]

If the message is received when using the 'Basic' search, try the 'Ad Hoc' search. If the message is received after searching with both the 'Basic' and 'Ad Hoc' searches, try refining your search. In some cases the person exists but their name is incorrect, attempt another search using just the following:

- ➢ Search on birth date only.
- ➢ Search on Surname only.

Save Your Searches

Saving the searches in Save Search Criteria allows quick access when completing either Basic or Ad Hoc Search/Match. Using Save Search Criteria reduces navigation through many components.

✧ *Notes:*

►To 'save' the search, select the Search Type - 'Person'.

► Use the Look Up tool to display the Search Parameters list.

► To Save the Basic Search, select the Search Parameter: UCSA_BASIC (Student Admin Basic Search) from the Look Up list.

►To Save the Ad Hoc Search, select the Search Parameter: UCSA_AD_HOC (SA – AD Hoc Search (Person) from the Look Up list.

►Click the Save Search Criteria link.
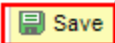
UNIVERSITY OF
CALGARY

Save Search As

Name the search and then click Save.

Name of Search: SA Basic

The saved search will contain these values:

    Search Type: =   Person
    Search Parameter: begins with UCSA_BASIC
    Ad Hoc Search   ☐
    Description: begins with

💾 Save   Return to Advanced Search

✧ **Notes:**

►Name the Search and then click the Save button.

►Click the link Return to Advanced Search. The saved search displays in the Use Saved Search field.

Search/Match
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Use Saved Search: SA Basic ▼

Search Type: = ▼   Person ▼
Search Parameter: begins with ▼ UCSA_BASIC 🔍
Ad Hoc Search   ☐
Description: begins with ▼

Search   Clear   Basic Search 💾 Save Search Criteria   Delete Saved Search

✧ **Notes:**

►**To Delete Saved Search:** Click the Delete Saved Search link to delete the saved search. Note this action is immediate.

►Saving the Search and adding Search/Match to your Favorites list will make the Search/Match process more efficient. Using Favorites reduces navigation through many components.

Instructor/Advisor Table

Navigation:

► Breadcrumbs
Curriculum Management > Instructor/Advisor information > Instructor/Advisor Table

Instructor/Advisor Table

The Instructor/Advisor Table is used to enter and view the list of available instructors for an Academic Organization based on the criteria entered on the Approved Courses tab.

✧ *Notes:*

►**Primary Acad Org**
This is the Department or Faculty that is the 'home' Department or Faculty of the instructor.

►**Instructor Available**
This value is for information purposes only and does not restrict scheduling assignments.

Important Notes:

The Effective Date *must* be before the term 'begin date' in order for that instructor to be on the list to assign classes for that term. For example, if the instructor's status needs to be changed mid-term the effective date would still be January 1 for Winter, May 1 for Spring, July 1 for Summer or September 1 for Fall.

When adding the instructor after the term has started, the **Effective Date must be changed to a date prior to the term begin date as previously mentioned before saving the record.** If the date is not changed and you have saved the record, contact the Scheduling Office to change the date for you.

When the instructor has more than one ID, make sure they are set up with the appropriate ID number – use the Staff ID not the Student ID.

Approved Courses

This page contains the approved Academic Organization(s) that an Instructor can be assigned to on the Schedule of Classes. If this page is left blank, the instructor will **not** show up on the list of available instructors.
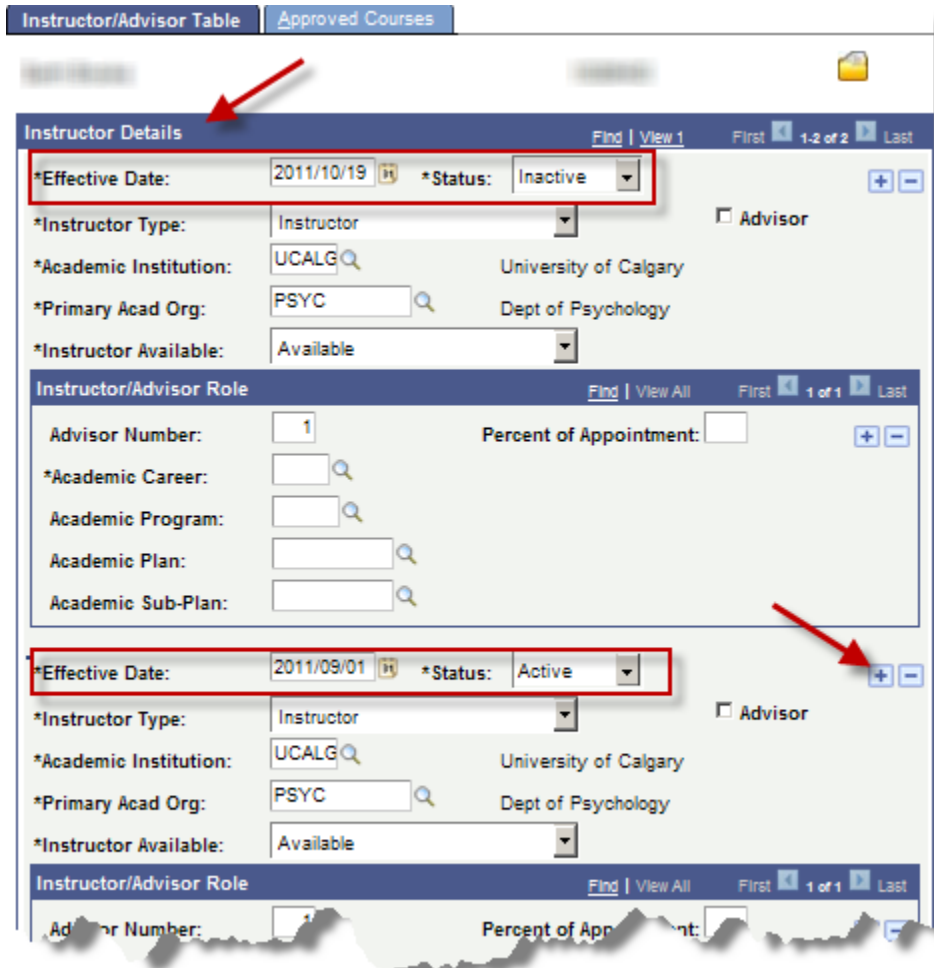
Inactivate Instructors/Advisors

Faculty/Department schedulers are responsible for updating the Instructor's 'Status' when required (for example, when the instructor leaves the U of C) **permanently**. Use this feature when the instructor/advisor will not be returning in the foreseeable future.

The instructor is not 'deleted' from the table. Instead the 'plus' sign ⊞ is used to add a new row so the history of the instructors record is maintained.

✧ *Notes:*

►**Effective Date** – again the effective date must be set prior to the term begin date for the term the instructor's status is changed.

Note: Effective Date must be unique from the previous row. For example if the previous row Effective Date was Jan 1 and the instructor status changed midterm, the Effective Date could be January 2nd but not January 1st.

►**Status** – select the appropriate value to reflect the instructor's status; 'Active' or 'Inactive'.

3 – Subjects

Within the timetabling module, Subjects must be identified in order to be included in the Course Catalog for scheduling. The Academic Subject Table component is used to add and maintain Subjects.

a) **Academic Subject Table**
This component stores the approved subjects at the University of Calgary. This Section will be maintained by the Scheduling Office. View only access for Department and Faculty schedulers.

Academic Subject Table

This approved list of Subjects can be used to find the description of a four letter subject code.

► **Breadcrumbs**
Set Up SACR > Foundation Tables > Academic Structure > Academic Subject Table

Academic Subject Table

Within this page, all information about the Subject is located.

✧ **Notes:**

►If a Subject is owned by multiple academic organizations, that information is displayed here.

4 – Course Catalog

The Course Catalog is the equivalent to the Courses of Instruction section in the University Calendar. Scheduling staff maintain the Course Catalog based on GFC approved changes to University courses.

1. **How to View Courses**

Scheduling staff enter information into the Course Catalog when new courses are added and maintain the Course Catalog when changes are made to existing courses.

2. **Course Attributes**

Course Attributes identify a number of characteristics of a course for reporting and custom processing – GFC hours, FCEF, etc. Course attributes can apply at the course or class level.

View Courses

The Catalog Data stores the basic information about a course.

Navigation:

► **Breadcrumbs**
Curriculum Management > Course Catalog > Course Catalog

Catalog Data

The Catalog Data page stores the title, course description, units, contact hours, grading basis, course attributes, etc.

✧ *Notes:*

► **Course ID**
Every course has a unique Course ID number that is used throughout the system.

► **Course Units/Hours/Count**
Min/Max Units store the range of approved Academic Units (GFC Hours). At the University of Calgary, the minimum and maximum units will be the same value. The Academic Progress Units are used to calculate the fee for the course and for academic load.

► **Course Grading**
This is the grading basis for each course based on the GFC approved grading basis.

► **Repeat for Credit Rules**
The repeat for credit basis must be indicated for formal and informal decimalized courses to allow students to repeat decimalized courses more than once and multiple times in one term.

► **Additional Course Information**
If a course requires consent for the student to add or drop a class, the Consent field will be set. This can be set to Department Consent or Instructor Consent or left as No Consent.
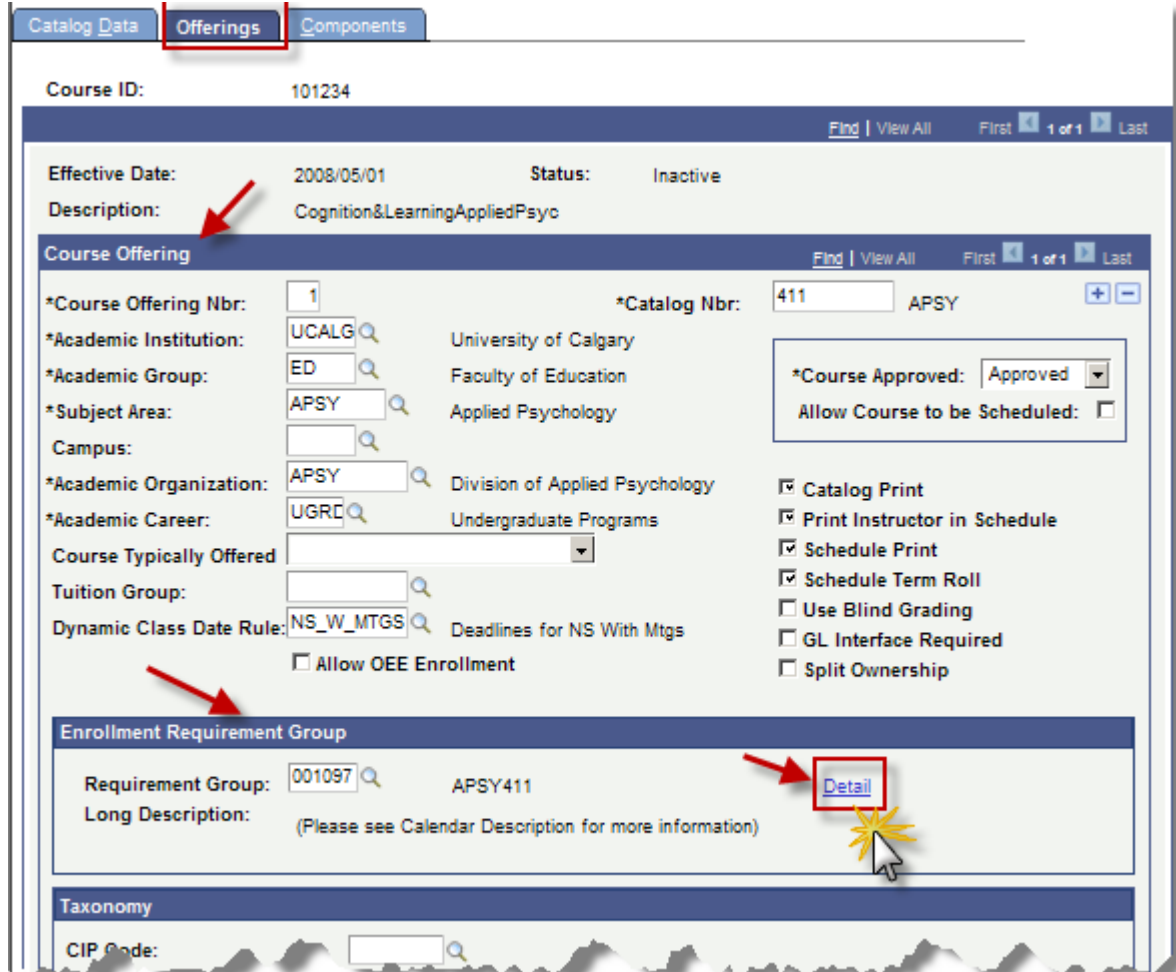
► **Course Attributes**
Courses can have unique identifiers that are categorized as course attributes. Courses can have more than one course attribute, such as GFC Hours and Full Course Equivalent Factor.

► **Course Topics**
Course topics need to be identified for informal decimalized courses. These will copy from term to term. New topics will be added to the Course Catalog by the Scheduling staff based on requests from Department/Faculty schedulers. All 3xx, 4xx and 5xx topics (5xx with a cap of more than 1) have to be requested via the scheduling website, approved by the AD and then approved by Admissions before they can be added.

Offerings

The offerings page contains the catalog number, course offering number, subject area, academic group, academic organization, enrollment requirement group, and course approved status.

Enrollment Requisite Summary:

✧ *Notes:*

► **Course Offering Nbr**

The course offering number is used when two courses can be stored under the same title, same offering, same content, but as a different subject/catalog number/academic organization, i.e. cross-listed courses.

► **Catalog Nbr**

This field identifies the catalog number for the subject, i.e. 411 for ASPY 411.

► **Course Approved**

The course approved field must be set to the 'Approved' status. This enables the course to be scheduled. High school courses will be set to 'Pending' to prevent these courses from being scheduled.

► **Dynamic Class Date Rule**

This is used to define the Default Date rule for use if the class is scheduled during a dynamically dated session. This will also be the Default Dynamic Date Rule Used when Defining Dynamic Class Dates. Refer to: *Dynamic Class Dates.*

► **Enrollment Requirement Group**

The enrollment requirement group is the requisite that restricts enrollment based on the pre- or co-requisite, academic level (year of program), etc. that has been approved for the course.

The Detail button is used to display the Enrollment Requisite Summary which references the pre- and co-requisites the student requires to take the course.

Components

The Components page stores the components of the course (i.e. lecture, lab, tutorial), final examination indicator and D2L information.

✧ *Notes:*

►**Final Exam**

The **Yes** value enables final exam scheduling. *See Module: Exam Scheduling.* If your role requires you to schedule Exams, you are encouraged to review the Job Aids and online learning available on the Student and Enrolment Services training website.

Final Exam: Yes

The **No** value indicates that this component has no final exam.

Last Class: Indicates that a final exam is taken in the last regularly scheduled class (as opposed to during final examination week).

5 – Course Requirements (Requisites)

Information that restricts student enrollment in courses and classes must be added to the Course Catalog. This is accomplished by setting enrollment and requisites. Requisites are:

- restrictions
- pre-requisites, co-requisites, and anti-requisites
- can be set at the course or class level
- can apply to more than one course or class

Enrollment requirements are maintained by Scheduling staff.

The following components can be used to view requirement information:

1. **Class Registration Information**
    Class Registration Information provides a summary of reserve capacities, course/class restrictions, and enrollment statistics for courses and classes for a specified term.

2. **UofC Requisite Summary**
    The Requisite Summary brings the requisite data contained on numerous pages in the Student Administration system together into one view.
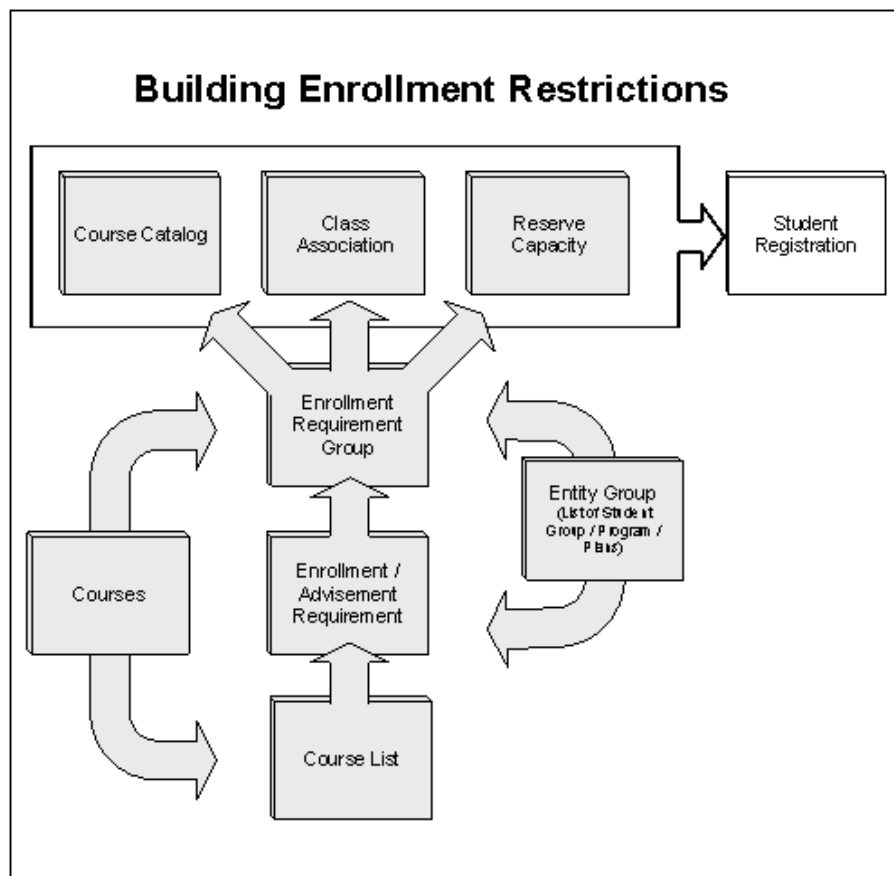
Class Registration Information

This screen pulls together information for a course for a given term and includes links to course level requisites, class level requisites and reserve capacities.

Navigation:

► Breadcrumbs
Curriculum Management > Enrollment Requirements > Class Registration Information

✧ *Notes:*

►**Course Requirement**
This link displays the Course Requirement set up as outlined in the UofC Calendar.

►**Class Requirement**
This link (if applicable) displays the restrictions set at the class section level.

►**Capacity Requirement**
The Capacity Requirement link displays the reserve capacities set at the class level that can restrict enrollment to certain groups of students for a certain period of time.

►**Cap Enrl**
This column shows the enrollment capacity for the section.

►**Tot Enrl**
This is the total number of students enrolled in the class section.

Requisite Summary

The **Course Requirement link** provides pre-requisite and/or co-requisite information as outlined in the U of C Calendar. In this example, PSYC 312 is the pre-requisite for this course. **Note**: it is recommended that you do not navigate to the UofC Requisite Summary directly as it may be difficult to find the right record.

Requisite Summary

Requisite Summary

Requirement Group: 002948	**Description:** Psyc 312	
Acad Group:	**Subject:** PSYC	**Catalog Nbr:** 411
Effective Date: 2010/09/01	**Status:** Active	

PREREQUISITE: PSYC 312. (Please see Calendar Description for more information)

Customize | Find | 🔳 🎴   First ◀ 1-3 of 3 ▶ Last

	Con	Rqrmnt	Con	Type	Condition	Units	Count		Gpv	Courses	
1		000002040		NOT			MAX:	.10	0.1	PSYC 319*	
2	AND			PRE			MIN:	1.00	1.7	PSYC 312 (134360)	
3	AND			CND	PL EQ PSYC-MAJ						

The **Class Requirement link** displays the restrictions at the Class level. In this example, this Class is restricted to PSYC Majors only.

Requisite Summary

Requisite Summary

Requirement Group: 000026	**Description:** PSYC Majors Only	
Acad Group: AR	**Subject:** PSYC	**Catalog Nbr:**
Effective Date: 2010/09/01	**Status:** Active	

Restricted to PSYC Majors only.

Customize | Find | 🔳 🎴   First ◀ 1 of 1 ▶ Last

	Con	Rqrmnt	Con	Type	Condition	Units	Count	Gpv	Courses	
1				CND	PL EQ PSYC-MAJ					

The **Capacity Requirement link** is used to view the reserve capacity set for the class for certain groups of students for a certain period of time. In this example the class is restricted to 3rd and 4th Year PSYC Majors only.

Requisite Summary

Requisite Summary

Requirement Group: 003557	**Description:** 3rd & 4th Yr PSYC Majors Only	
Acad Group: AR	**Subject:** PSYC	**Catalog Nbr:**
Effective Date: 2010/09/01	**Status:** Active	

Restricted to 3rd & 4th Yr PSYC Majors Only

Customize | Find | First 1-2 of 2 Last

Con	Rqrmnt	Con	Type	Condition	Units	Count	Gpv	Courses		
1			CND	LVL GE 3						
2 AND			CND	PL EQ PSYC-MAJ						

◇ **Notes:**

►A description of the prerequisite from the Calendar is contained above the grid and the grid itself provides detailed information about the prerequisite.

►Details of each prerequisite are described within brackets.

6 – Schedule of Classes

1. **Schedule New Course**

The Schedule New Course component is used when class sections have not yet been scheduled for a course in a term. This could include a new course or a course that was not offered in the prior term.

2. **Maintain Schedule of Classes**

The Maintain Schedule of Classes is identical to the Schedule New Course except that it is used for updating courses that are already scheduled in a term.

3. **Schedule Class Meetings**

Schedule Class Meetings allows users to make quick changes to the meeting pattern information and view enrollment information for individual class sections. It does not provide the ability to add new sections. Class sections that have alternating week meeting patterns can be created using the alternate week's page. Once a class section has been combined with one or more other sections, meeting pattern information can only be maintained through 'Schedule Class Meetings'.

4. **Update Sections of a Class**

This component provides a way to view the current enrollment numbers for a course and to update enrollment limits and section association/combinations. It allows users to easily change information about how sections are linked, along with auto enrollment and enrollment totals.

5. **Adjust Class Associations**

The Class Association page allows course information for the related class sections to be updated. Information like the Units, required components, and class restrictions can be controlled here. This update page will be restricted to Scheduling staff in Enrolment Services.

6. **Class Event Table**

As classes are scheduled into rooms, an Event ID is assigned and a record of each date, room, start / end time is created, excluding those dates defined as holidays on the holiday schedule. This allows the system to perform room conflict checking when doing new bookings. The Class Meeting page allows users to view the listing of the current bookings.

Prior to scheduling the classes for the term the Detailed Class Schedule report should be run in Excel to see what has been rolled forward from last year's schedule (see Scheduling Reports).

Schedule New Course

Schedule New Course is used when class sections have not yet been scheduled for a course in a specific term.

Navigation:

► Breadcrumbs
Curriculum Management > Schedule of Classes > Schedule New Course

This search page is used to find the course that is going to be scheduled. The list will contain all approved courses for that term.

When the course does not display in the list, check the UofC Calendar to see if the course is still being offered. If the course is being offered, contact the Scheduling Office to have the course added.

Schedule New Course

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Academic Institution:	=	UCALG
Term:	=	2111
Subject Area:	=	PSYC
Catalog Nbr:	begins with	
Academic Career:	=	
Campus:	begins with	
Description:	begins with	
Course ID:	begins with	
Course Offering Nbr:	=	

☐ Case Sensitive

[Search] [Clear] Basic Search 💾 Save Search Criteria

Search Results

View All .... First ◄ 1-100 of 184 ► Last

Academic Institution	Term	Subject Area	Catalog Nbr	Academic Career	Campus	Description	Course ID	Course Offering Nbr
UCALG	2111	PSYC	203	Undergrad	(blank)	Psychology for Everyday Life	160679	1
UCALG	2111	PSYC	205	Undergrad	(blank)	Principles Of Psychology	134333	1
UCALG	2111	PSYC	299	Undergrad	(blank)	Junior Psychology	150390	1
UCALG	2111	PSYC	305	Undergrad	(blank)	HistoryOfPsychologicalThought	134355	1
UCALG	2111	PSYC	312	Undergrad	(blank)	ExperimentDesign&QuantiMethod	134360	1
	211	YC	12A	Undergrad	bl	entD &QuantiMethod	13	

The following pages are used to create the class section(s).

Basic Data

The Basic Data page is the page where the session, class section, class type, associated class, campus, location, academic organization, instruction mode and start/end date information is specified.

✧ **Notes:**

►**Auto Create Component**

The auto create component feature provides the ability for the user to click this button to have the system automatically create the components associated to the course. This was identified when the course was setup in the Course Catalog – see *Course Catalog*. Clicking the Auto Create component will create the blank components for the user to enter the information. If the components were not set up for auto create, this functionality will not work and the user will receive a message. Please contact the Scheduling

Office to have missing components added to course catalog. This feature can also only be used if the course has not been previously scheduled for the term.

►Session
This is used to specify the session the class will be offered in. The session defines the start and end dates for the class as well as the deadline dates (i.e. last day to add, last day to drop, last day to withdraw). Examples of different session types include: Regular Academic, Non-Standard, Group Study Program, Multi Term Part A, Multi Term Part B, Block Week, etc.

►Class Section
Class Section identifies the different section numbers. For example: a course may have 3 lectures, 6 labs, and 4 tutorials.   Lectures are referred to as 01, 02; labs are referred to as B01, B02; tutorials are T01, T02 and seminars are referred to as S01, S02.

►Component
The Component refers to the type of class meeting. Examples include: Lecture, Lab, Tutorial, Seminar, etc.

►Class Type
There are two class types: enrollment and non-enrollment. If a course consists of only one component the class type will always be 'Enroll'. If the course has two or more components, then the class type must be set in conjunction with how the class associations enroll will be used. One of the components must be set to 'Enroll' and the other component(s) will be set to 'Non-Enroll'. For example, if a class has 3 labs and 1 lecture, the labs would be the enrollment section because the student would be registering based on the lab time, not the lecture.

►Associated Class
Class associations are used to tie components together for enrollment purposes. This is the lecture/lab combination that students must register in. See Examples 1, 2, 3 and 4 for various scenarios. In Example #1, there would be 4 class associations set up for the course. In Example #2, there would only be one class association as it does not matter which lab goes with which lecture. Example #3, Topics courses, have a requirement of separate class associations. Example #4, courses with restrictions, also have a requirement of separate class associations.

In Example #1, there would be 4 class associations set up for the course.

Example #1:
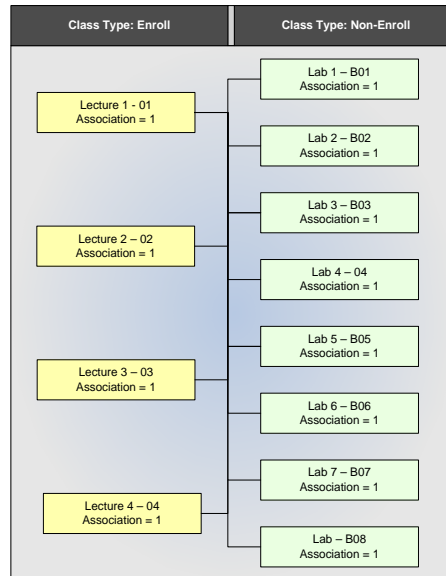*4 Lectures, 8 Labs – 1 Lecture to 2 Labs*

Class Type: Non-Enroll	Class Type: Enrollment
	Lab 1 – B01 Association = 1
Lecture 1 - L01 Association = 1	
	Lab 2 – B02 Association = 1
	Lab 3 – B03 Association = 2
Lecture 2 - L02 Association = 2	
	Lab 4 – B04 Association = 2
	Lab 5 – B05 Association = 3
Lecture 3 - L03 Association = 3	
	Lab 6 – B06 Association = 3
	Lab 7 – B07 Association = 4
Lecture 4 - L04 Association = 4	
	Lab 8 – B08 Association = 4
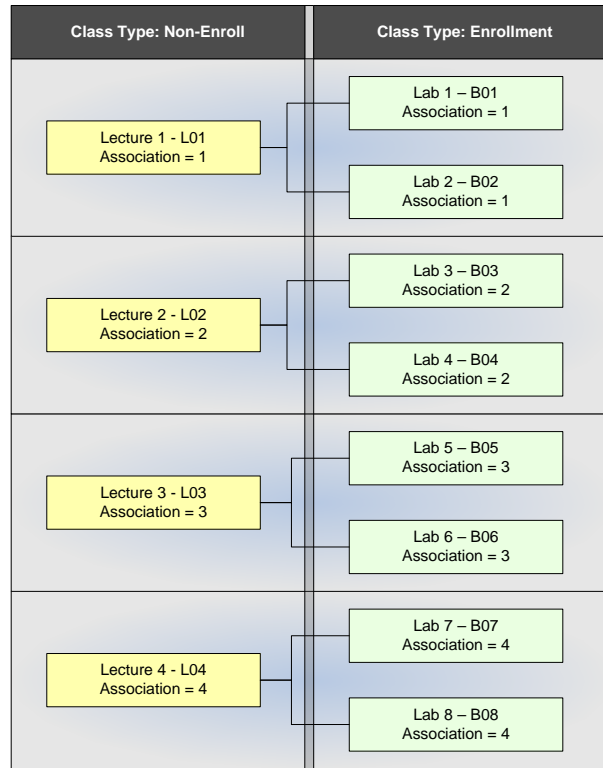
Example #1:
6 Lectures, 12 Labs - 1 Lecture to 2 Labs

Customize | Find | | | First ◄ 1-18 of 18 ► Last

	Class	Crse Topic	Class Nbr	Status	Cap Enrl	Tot Enrl	Assoc Class	Class Requirement	Catlg Rqs	Res Cap Seq	Capacity Requirement	Start Date	Rsrv Cap	Rsrv Cap Used	Consent Required
1	LEC 01		33515	Open	130	124	1	None	Y		None				N
2	LEC 02		33516	Open	130	128	2	None	Y		None				N
3	LEC 03		33517	Open	130	126	3	None	Y		None				N
4	LEC 04		33518	Closed	130	131	4	None	Y		None				N
5	LEC 05		33519	Open	130	126	5	None	Y		None				N
6	LEC 06		33520	Open	130	120	6	None	Y		None				N
7	LAB B01		33521	Open	65	61	1	None	Y		None				N
8	LAB B02		33522	Open	65	63	1	None	Y		None				N
9	LAB B03		33523	Open	65	64	2	None	Y		None				N
10	LAB B04		33524	Open	65	63	2	None	Y		None				N
11	LAB B05		33525	Open	65	62	3	None	Y		None				N
12	LAB B06		33526	Open	65	64	3	None	Y		None				N
13	LAB B07		33527	Closed	65	65	4	None	Y		None				N
14	LAB B08		33528	Closed	65	66	4	None	Y		None				N
15	LAB B09		33529	Open	65	64	5	None	Y		None				N
16	LAB B10		33530	Open	65	62	5	None	Y		None				N
17	LAB B11		33531	Open	65	60	6	None	Y		None				N
18	LAB B12		33532	Open	65	60	6	None	Y		None				N

In Example #2, there would only be one class association as it does not matter which lab goes with which lecture.

Example #2:
4 Lectures, 8 Labs – Any Lecture to Any Lab

Example #2:
3 Lectures, 8 Labs – Any Lecture to Any Lab

Important Note:
Topics courses MUST have a requirement of separate class associations.

Example #3
Topics Course

Class	Crse Topic	Class Nbr	Status	Cap Enrl	Tot Enrl	Assoc Class	Class Requirement	Catlg Rqs	Res Cap Seq	Capacity Requirement	Start Date	Rsrv Cap	Rsrv Cap Used	Consent Required
1 SEM S01	16	77302	Open	25	20	1	SOWK Students Only	Y		None				N
2 SEM S02	9	91313	Open	25	24	2	None	Y		None				N
3 SEM S03	22	91326	Open	25	19	3	None	Y		None				N
4 SEM S04	9	92121	Open	30	13	4	None	Y		None				N

First ◀ 1-4 of 4 ▶ Last — Customize | Find | ▦

Courses with different sections restricted to different majors/minors must also have separate class associations.

Example #4
Courses with Restrictions

Subject Area:	SYC
Catalog Nbr:	205
Course ID:	134333
Course Offering Nbr:	1

Course Requirement:	None
Consent Required:	No Consent

Customize | Find | ▦   First ◀ 1-3 of 3 ▶ Last

Class	Crse Topic	Class Nbr	Status	Cap Enrl	Tot Enrl	Assoc Class	Class Requirement	Catlg Rqs	Res Cap Seq	Capacity Requirement	Start Date	Rsrv Cap	Rsrv Cap Used	Consent Required
1 LEC 01		31506	Closed	300	300	1	None	Y	1	PSYC & NEUR Majors	2008/05/05	300	25	N
2									1	PSYC & NEUR Majors	2008/11/17		25	N
3 LEC 02		32927	Closed	1		2	None	Y		None				N

►**Instruction Mode**: It is critical to indicate the correct instruction mode as this affects fees for courses (e.g. Distance Education). Use the look up tool and select the correct Instruction Mode from the list of instruction modes. Please note there are some newly added instruction types that may affect the component and what was previously indicated so please update accordingly.

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Look Up Instruction Mode

Help

Academic Institution:	UCALG
Instruction Mode:	begins with ▾	
Description:	begins with ▾	

Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 | First ◀ 1-14 of 14 ▶ Last

Instruction Mode	Description
BL	Blended Learning
CO	Co-op
DE	Distance Education
DR	Directed Research
EP	English Language Program
FS	Field School
IP	IPOD Presentations
IR	Independent Research
IS	Independent Study
IT	Internship
P	In Person
PR	Practicum
SP	Senior Project
WW	Web-Based Instruction

Meetings

The meetings page allows Schedulers to schedule the times and days for class meetings, assign an instructor, and book departmental facilities.

✧ *Notes:*

►**Facility ID**
This is used to book the selected facility. Department/Faculty schedulers will be limited to select non-centrally controlled space only.

►**Instructors For Meeting Pattern**
Instructors are associated to classes here. Only instructors that are associated to the same Academic Organization on the Instructor/Advisor Table will be available. If an instructor needs to be added, see *Instructors* for details.

►**Workload**
This field is used to indicate the workload when the Instructor Role is Alt Instr (AL) or Simultaneous (SI) e.g. 50 for 50 per cent

Important Notes:

Instructor Role – see Appendix II.

The '**Access**' field for Instructors **must** be set to '**Grade**' in order for them to access the Grade Roster in their Faculty Center.

Course Instructors who are Approvers may have

    a)   '**Admin**' as their **Instructor Role** and '**App & Post**' as their **Access** <u>AND</u> '**Prim Instr**' as their **Instructor Role** and '**Grade**' as their **Access**

    <u>OR</u>
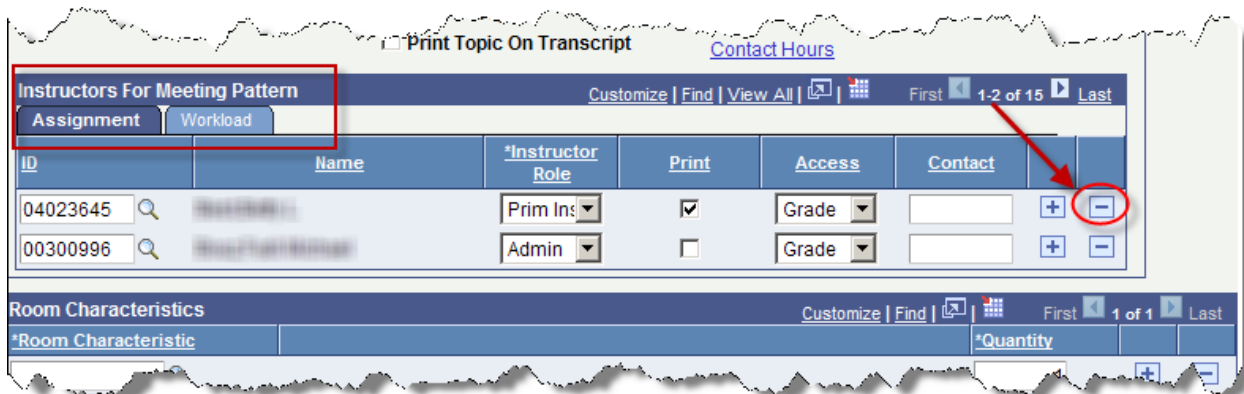
    b)   '**Prim Instr**' as their **Instructor Role** and '**App & Post**' as their A**ccess**.

    In these cases, the Instructor will <u>not</u> be able to enter their own grades; their Grade Administrator will need to complete this for them. Once the grade entry is completed by the Grade Administrator the Instructor can, as an Approver; 'approve and post' the grades.

    To request Approver/Administrator access, complete an IAM Request or contact the IT Support Center at 220-5555 or email itsupport@ucalgary.ca.

If the course is taught on two different days, two different times, instructors <u>should</u> be listed in both sequences.

Maintaining instructor information is also critical for the Universal Student Ratings of Instructors (USRI). Instructors no longer teaching a course <u>must</u> be removed from the Meetings page.

Instructors no longer teaching at the UofC must also have their 'status' updated to 'Inactive' in the Instructor/Advisor Table (*reference Inactivate Instructors/Advisors*).

Enrollment Cntrl

| Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | Exam | LMS Data | Class Comments |

Course ID:	134333
Academic Institution:	University of Calgary
Term:	Winter 2011
Subject Area:	PSYC
Catalog Nbr:	205

Course Offering Nbr:	1
	Undergrad
	Psychology
	Principles Of Psychology

Enrollment Control   Find | View All   First ◄ 1 of 15 ► Last

Session:	1	Regular Academic	Class Nbr:	14594
Class Section:	01	Component: Lecture	Event ID:	000038044
*Class Status:	Active ▼		Cancel Class	

Class Type:	Enrollment	Enrollment Status:	Open	
*Add Consent:	No Consent ▼	Requested Room Capacity:	300	Total
*Drop Consent:	No Consent ▼	Enrollment Capacity:	300	299
1st Auto Enroll Section:		Wait List Capacity:		0
2nd Auto Enroll Section:		Minimum Enrollment Nbr:		
Resection to Section:				

☑ Auto Enroll from Wait List   ☐ Cancel if Student Enrolled

✧ **Notes:**

►**1st Auto Enroll Section/2nd Auto Enroll Section**
Auto Enroll can be used to simplify registration when a course has more than one component and students must register in a specified combination. For example: LAB B01-B04 register in LEC 01, the LAB B01-B04 are set to auto enroll into LEC 01. Up to two components can be auto enrolled.
Important Note: The auto enroll information must be attached to the enrollment component. You can identify the enrollment component by referring to the Class Type field. Also refer to 'Basic Data, Class Type'.

►**Resection to Section**
Enter the alternative section in which the system automatically enrolls a student if the selected section is full. The selected section and the resection to section class must be the same type and the class section number must be a higher value (i.e. resection 01→ 02, but not 02 → 01).

►**Enrollment Capacity**
The system populates the enrollment capacity by default from the default section size on the **Course Catalog page.** The Enrollment Capacity must be specified in order to have a room assigned; no cap, no room.

►**Cancel if Student Enrolled**
This is used as a safety mechanism so that a class cannot be mistakenly cancelled when students are enrolled. Therefore, unless cancelling a class in which students are already enrolled, you must leave this UNCHECKED. *See Section: Class Cancellation.*

Reserve Cap

✧ **Notes:**

►This page is used to reserve seats for different groups of students for certain periods of time. The example above illustrates as of April 1, 2010 there were 300 spaces reserved for PSYC, NEUR, MNSC, BHSOC Majors only. As of November 03, 2010 the reserve capacity was removed.

►The Reserve Cap page will only be updated by the Scheduling staff in Enrolment Services. All reserve capacities must be updated via the Scheduling website and approved by their Associate Dean and then by the Manager of Scheduling. When updating website, please indicate if they are to be deleted, updated or new reserve caps created.

Notes

Notes refer to the data that is displayed in the Schedule of Classes and Self Service. These can include pre-defined notes, or free-format text.

✧ *Notes:*

► The Notes page is for students use, not scheduling use and will not be checked by the Scheduling office for reserve capacities, fees, etc.

►**Sequence Number**
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.

►**Note Nbr**
This allows you to choose a pre-defined note.

►**Free Format Text**
Notes that will not be used repeatedly can be added to classes in the Free Format Text field.

Exam

This page displays final examination details once the final exam schedule is posted by Enrollment Services staff. The Fall/Winter final examination schedule will be posted approximately six weeks after the start of classes. The Spring/Summer final examination schedule will be posted approximately three weeks after the start of classes. Staff have view access only.

Exam Info

The Exam Info page is only available when the Examination Office opens access for individuals with the appropriate security to submit Final Exam requests. Final Examination deadline dates can be viewed on the Enrollment Services Faculty and Staff Exam Information web site http://www.ucalgary.ca/registrar/exams you will be required to log in with your eID credentials.

The Exam Info page is used to enter Final Examination requests. Please reference the Student and Enrolment Services > Exam Scheduling Support Documents for the steps to enter and submit Final Examination requests and access Exam Scheduling Reports.

After entering the duration in minutes (e.g. 180) the Final Exam indicates: Yes, indicating the final exam will be sheduled. It is important to change the perferred location as the default is the Current Classroom. Any specific notes can be entered (e.g. Double-spaced seating, etc.)

✧ *Notes:*

►**Duration**

This allows you to specify the duration of the exam, for example, 180 would equal a three hour exam.

►**Evening Exam**

This checkbox can be used to indicate if the examination should be scheduled for an evening time.

►**Preferred Location**

Indicates the preferred location for the examination; this can be current classroom, gymnasium or another location can be specified. The default is current classroom.

Important Note:

When Current Classroom is specified, this means the examination will be scheduled in the classroom currently being used for this class. If you wish to schedule the final exam in the Gymnasium or Other Location, you must specify the preferred location.

►Notes

The Notes field is used to advise the Examinations Office of any particular requirements for the exam or other important information.

LMS Data

This page is for view purposes only. The values default based on the class information. The LMS URL refers to the main Desire2Learn (D2L) login page.

Class Comments

The Class Comments page is used to convey important information to the Scheduling Office. Distance fees, otp fees, supplementary fees, classes scheduled back to back, instructor medical issues, must be entered here.

✧ **Notes:**

►**Preferred Facility**

If a specific centrally controlled space is desired, it can be requested by specifying it in the Preferred Facility field.

Fees, Reserve Capacities and Restrictions

Please consult the Scheduling website to enter this information: https://www.ucalgary.ca/calendar-scheduling/ Please note these cannot be added to the course once students are registered.

Maintain Schedule of Classes

The Maintain Schedule of Classes is used to adjust the schedule of classes that already have class meetings scheduled. The pages are identical to those in **Schedule New Course**. For screenshots of *Maintain Schedule of Classes*, see Schedule New Course.

Navigation:

► Breadcrumbs
Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

The search returns the list of courses that have been scheduled for the term for the specified subject.

Schedule Class Meetings

This component is used similarly to the previous two components with some exceptions.

- Used when scheduling courses with combined sections. *See Section: Combined Sections.*
- Alternating Week meeting patterns can be setup within this component.

Navigation:

► **Breadcrumbs**
Curriculum Management > Schedule of Classes > Schedule Class Meetings

Alternate Weeks

This page allows the user to specify the alternating week pattern that the class will be taught (i.e. every other week or every three weeks). The system will generate meeting patterns in the schedule to reflect each of the weeks to be scheduled.

The following outlines the two steps necessary for scheduling alternating weekly patterns; scheduling even weekly patterns first then, scheduling odd weekly patterns after. When scheduling alternating weeks, PeopleSoft will not schedule any alternating dates during Reading Week or Reading Day.

Step One: Schedule the Even Labs (e.g. B02) from Schedule Class Meetings tab
Enter the applicable Term, Subject Area, Catalog Nbr and click Enter or Search (e.g. 2197 Fall 2019, CHEM 209). Click the **Search** button.
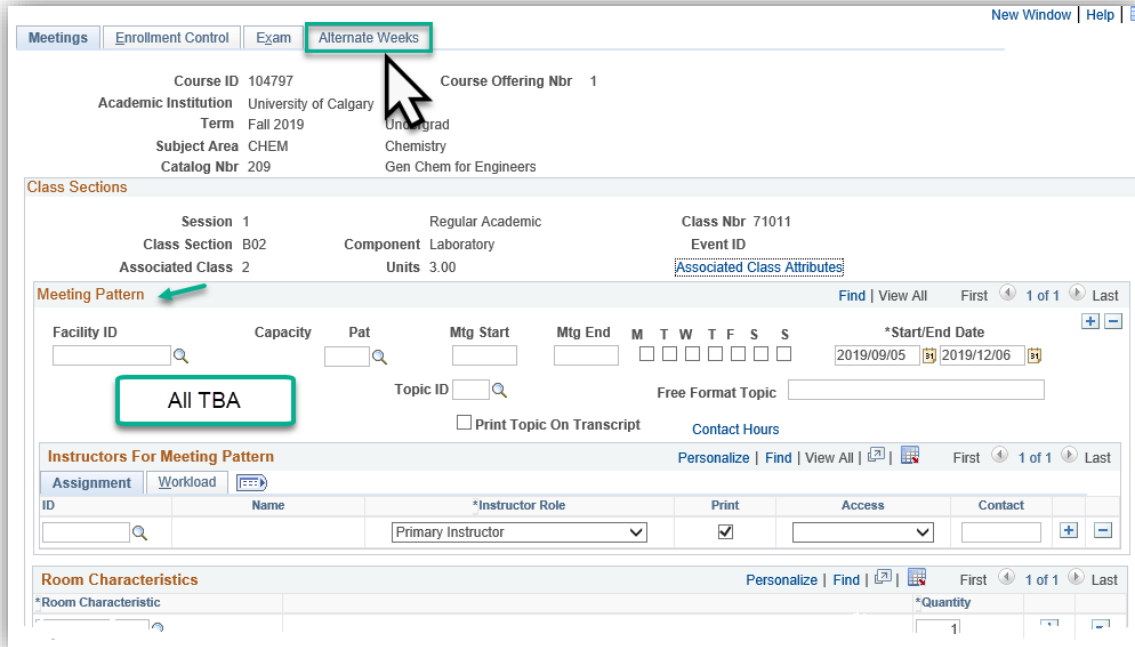
Search

The Search Results will display a grid of Lectures, Labs and/or Tutorials associated with the class. For this first step, schedule the alternating weekly labs for the **even numbered labs first.** For this example, CHEM 209 has 20 labs (B01-B20) therefore schedule the even lab first (e.g. B02).
Click the **B02** link.

Note the class section is TBA; nothing has been scheduled. PeopleSoft will automatically be set to TBA for any previously scheduled alternating weekly patterns from previous terms. Begin with the Alternate Weeks tab in Schedule Class Meetings. Click the **Alternate Weeks** tab.

Alternate Weeks

Click **Look up Alternating Week Pattern**.

The most common type of Alternating Week Pattern is ALT2 - Alternate Week - Every 2 Weeks. Click the **ALT2** link.

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Click the **Alternating with** list. When scheduling the first (even) lab do not make a selection from the Alternating With list of options; leave this blank. Click the **Laboratory** object.
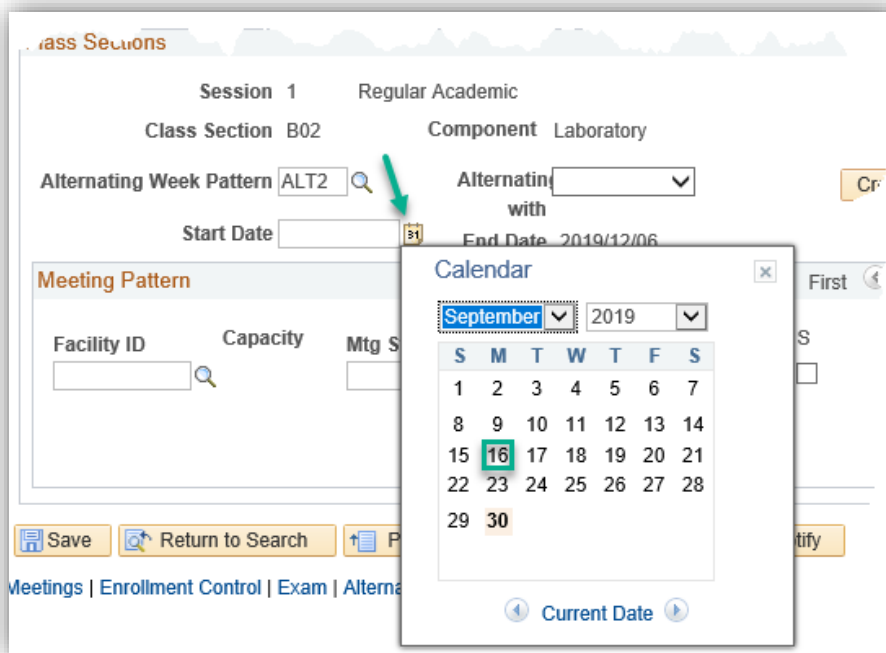
Click the **Calendar Start Date** button and select the date the lab will begin. For this example, since it is an even lab (B02) we will select the second week of September, since the odd lab will begin in the first week of September therefore they will alternate even and odd. Click the **16** link.
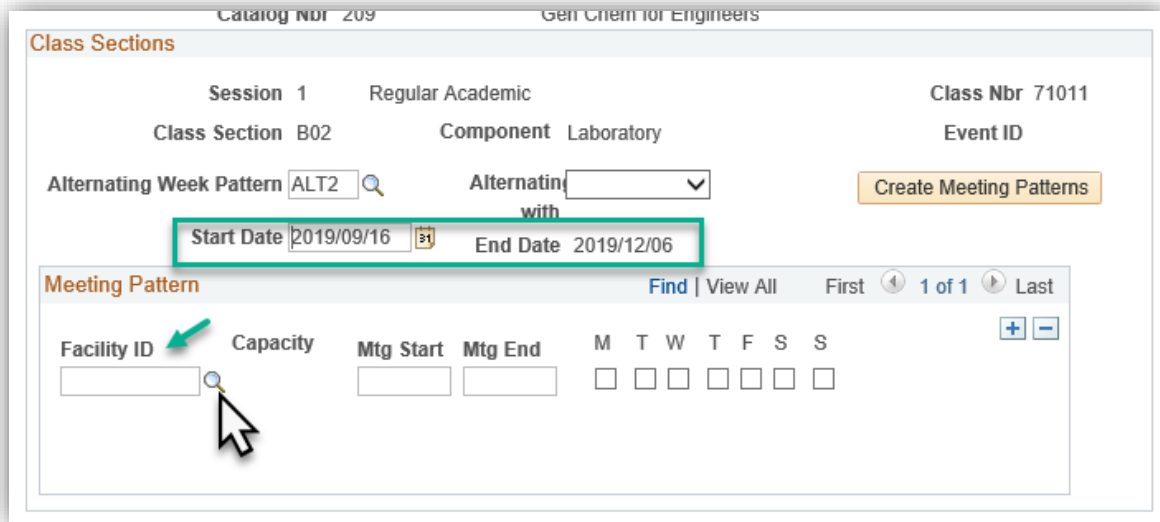
Note the start date is now 2019/09/16 and the end date defaults to the end of the term 2019/12/06. For your convenience, it is recommended that you enter the Facility ID at this time as it will be entered automatically. Click the **Look up Facility ID** button.
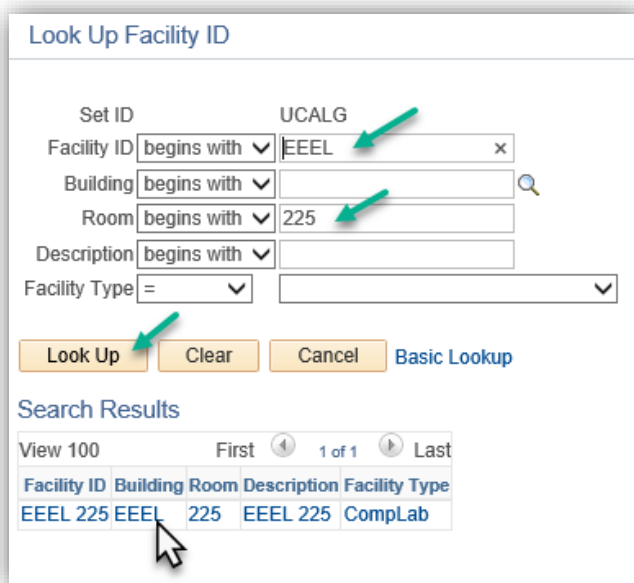
Enter the Facility ID (e.g. EEEL) and the Room (e.g. 225) and press Enter or Lookup. Additionally, if you know the Facility ID and Room number you can enter it directly. Click the **Look Up** button. Click the facility link (e.g. EEEL 225).
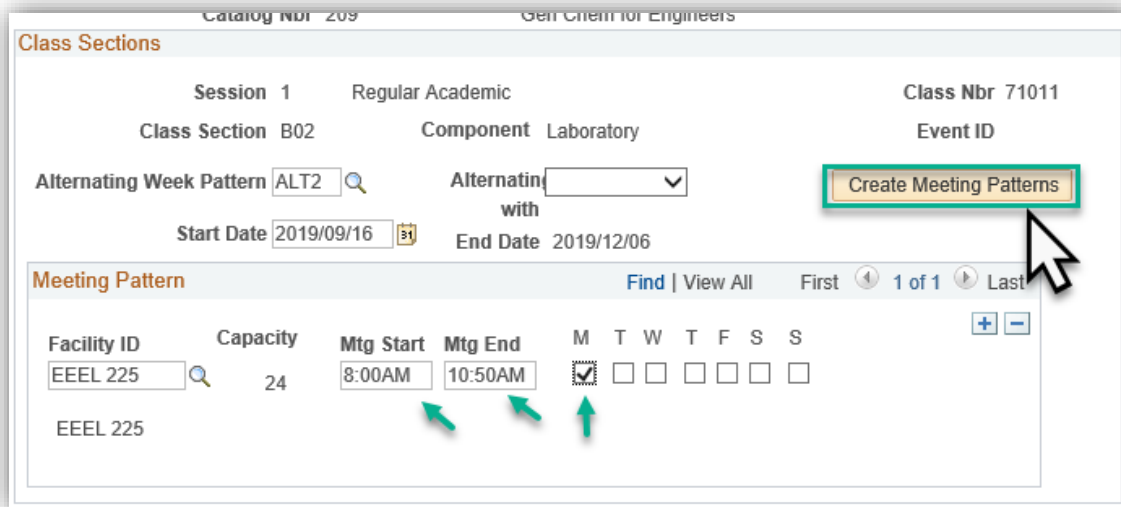
Enter the desired meeting start and end times (e.g. 8:00am to 10:50am) and the meeting weekday(s) (e.g. Monday). Once all the information has been entered, you can continue. Click the **Create Meeting Patterns** button.

Create Meeting Patterns
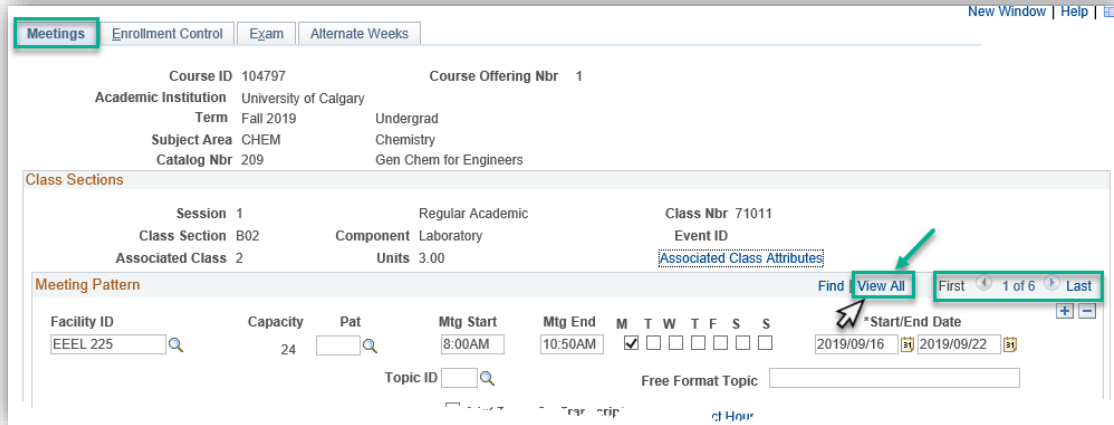
Confirm the alternating meeting dates on the Meetings tab. Click the **Meetings** tab.
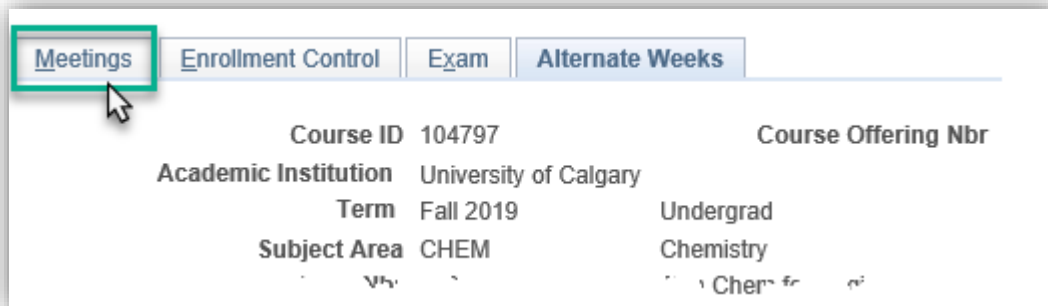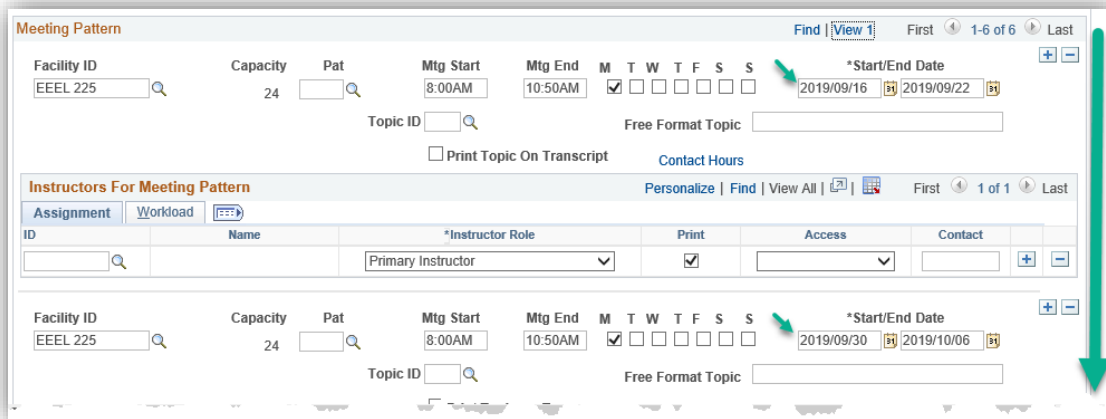
For this example there have been six dates created for the even alternating weekly meeting pattern. Click the **View All** link.

Note the first date for the meeting pattern is displayed 2019/09/16 September 16, 2019. Scroll down to verify the additional dates (e.g. September to December 2019). Note there is only one even date in November as PeopleSoft has automatically skipped reading week.

Once the alternating week pattern for the even dates have been verified, save the information. Click the **Save** button.

Step Two: Schedule the Odd Labs (e.g. B01) from Schedule Class Meetings tab

The next step of the process will be to schedule the odd labs (e.g. B01). Enter the same Term (e.g. 2197 Fall 2019), Subject Area (CHEM) and Catalog Nbr (e.g. 209). Press Enter or Search. Click the **Search** button.

Scroll down the grid and select the odd numbered lab (e.g. B01) to schedule it alternatively from the even lab previously scheduled. Click the **B01** link.

Note the class section for Lab B01 is TBA; nothing has been scheduled. PeopleSoft will automatically be set to TBA for any previously scheduled alternating weekly patterns from previous terms. Click the **Alternate Weeks** tab.
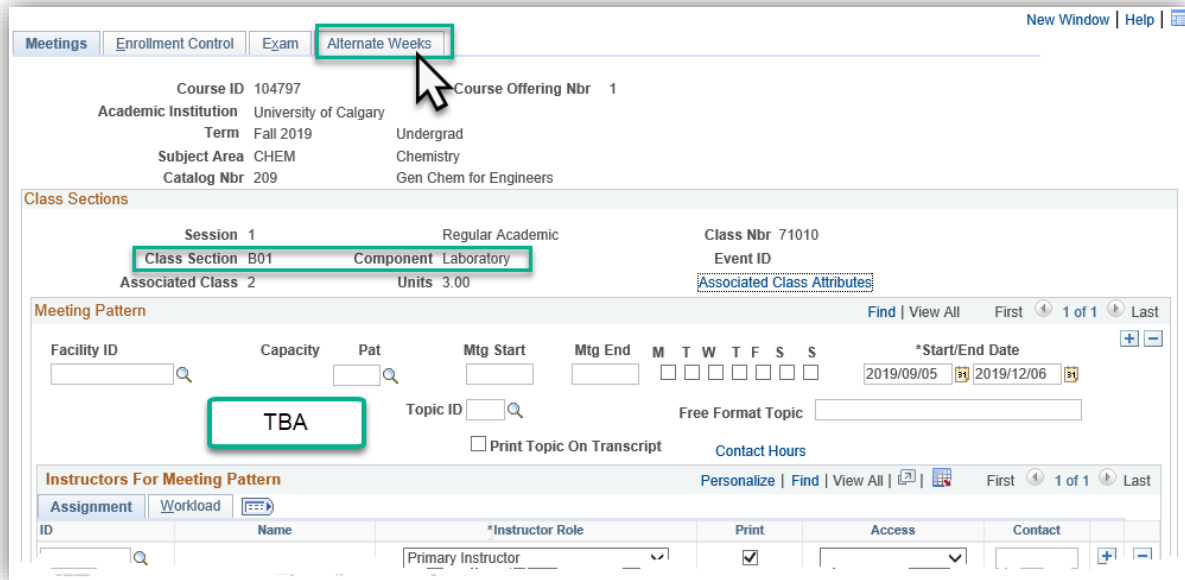
Click the **Look up Alternating Week Pattern** button. Since you will be alternating this with the previous lab, select ALT2 - Alternate Week - Every 2 Weeks. Click the **ALT2** link.

Click the **Alternating with** list. Since you will be alternating this lab with the previously scheduled even lab, select the Lab option from the Alternating with options. Click the **Lab** list item.
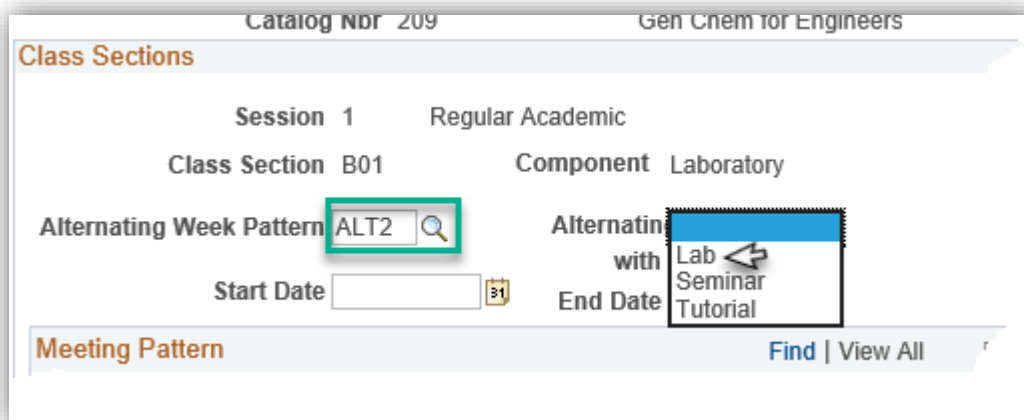
Click the **Calendar Start Date** button. Select the applicable date for the first week of the odd lab (e.g. September 9, 2019). Click the **9** link.
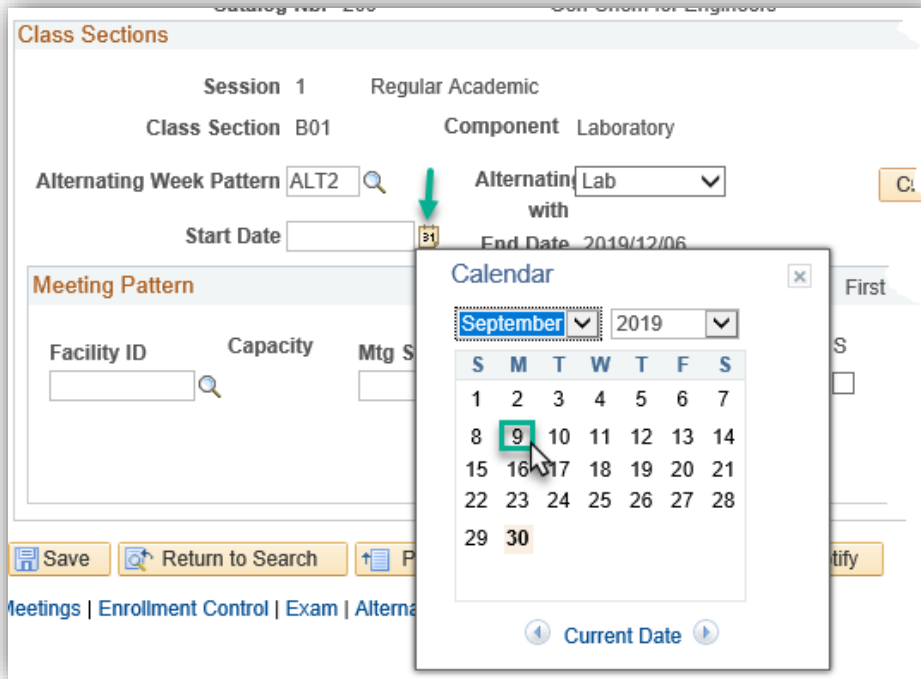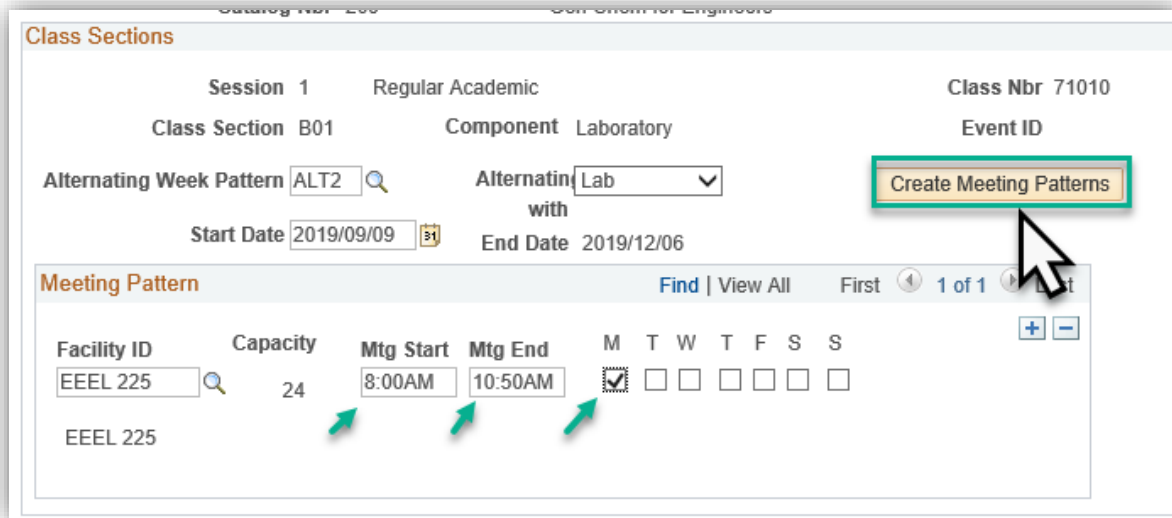
Note the start date for the odd alternating week is now 2019/09/09 and the end date defaults to the end of the term 2019/12/06. Enter the same Facility ID as the even lab. You can select it or enter it directly. Click the **Look up Facility ID** button and enter the same facility (e.g. EEEL 225) as per the odd pattern.
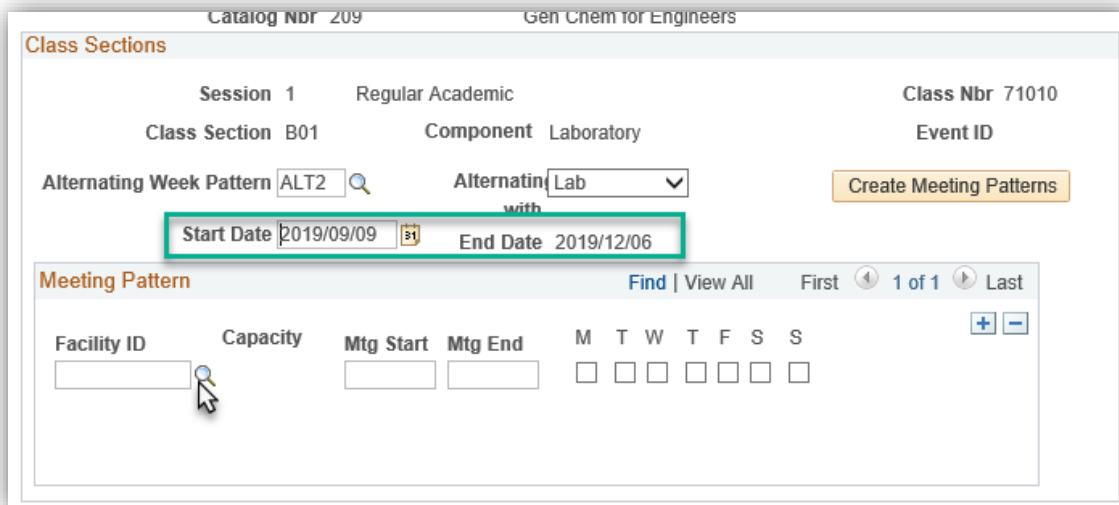
Enter the applicable meeting start and end times as per the even lab and create the meeting patterns.
Click the **Create Meeting Patterns** button.
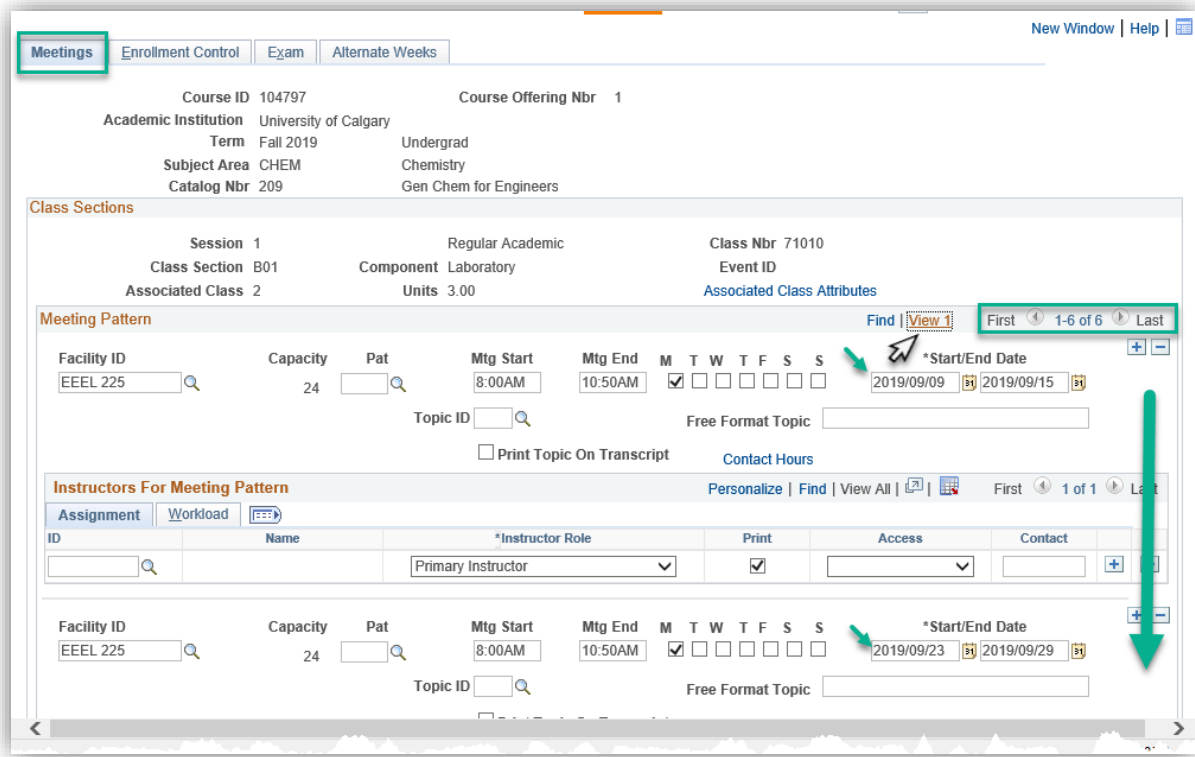
Create Meeting Patterns

Verify the accuracy of the meeting patterns on the Meetings tab. Click the **Meetings** tab.

Meetings

Note there have been six alternating labs scheduled. Click the **View All** link. Scroll down to confirm the dates of the alternating odd dates. Note the date for November Reading week will not been included in the pattern.

After verifying the odd alternating week dates, save the information. Repeat this same process for any other alternating weekly labs you have. Click the **Save** button.

✧ *Notes:*

►**Create Meeting Patterns**
This button will generate the schedule based on the Alternating Week Pattern selected. Labs have to alternate with labs and tutorials have to alternate with tutorials.
Note: Once the meeting patterns have been generated, any changes to the meeting pattern information must be manually entered on the meeting pattern page.

►**Start Date**
A start date must be specified as some sections start the first week and some sections start the second week.

Update Sections of a Class

This component can be used to quickly update class status and class enrollment limits.

Navigation:

► **Breadcrumbs**
Curriculum Management > Schedule of Classes > Update Sections of a Class

Class Status

Class types (enrollment or non-enroll), Class Status, Class Associations, Consent and Auto Enrollment can be changed on this page.

✧ *Notes:*

►This page provides a summary of the fields populated in ***Schedule New Course – Basic Data.***

Class Enrollment Limits

Use this page to adjust the enrollment limits, waitlist capacity and view current enrollment/waitlist totals for each section of a course.

Update Sections of a Class

Course ID:	126002
Academic Institution:	University of Calgary
Term:	Winter 2011
Subject Area:	MATH
Catalog Nbr:	271

Course Offering Nbr: 1

Undergrad
Mathematics
Discrete Mathematics

Class Sections   Customize | Find | View All | 🖾 | 🎫   First ◄ 1-7 of 7 ► Last

Class Status | Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Min Enrl
Regular	01	10204	Lecture	120	102	4		
Regular	02	10206	Lecture	120	84	4		
Regular	B01	10208	Laboratory	120	102	4		
Regular	B02	10210	Laboratory	120	84			
Regular	T01	10212	Tutorial	80	79			
Regular	T02	18602	Tutorial	80	74			
		18604		80	33			

✧ **Notes:**

►This page is a summary of the fields populated in *Schedule New Course – Enrollment Cntrl.*

Adjust Class Associations

The class association stores default information from the Course Catalog and allows exceptions to be entered for the related class sections. In most cases information on the Class Association and Class pages will never be changed. Class requisites will be updated as required.

Navigation:

► Breadcrumbs
Curriculum Management > Schedule of Classes > Adjust Class Associations

Class Associations

The Class Association page allows the approved units, progress units, course count and other unit related values to be altered. This page is maintained by the Scheduling Office; view only access for faculty and departments.

◇ **Notes:**

►**Class Roll (*Used by Enrolment Services Staff only*)**
Changes to the defined units can be updated to the student record using the class roll.

Class Components

This page shows the approved components and associated information for the related sections. If the approved components change for a term (i.e. LEC/LAB – offer only LEC in spring) then it is updated here by the Scheduling Office staff and applies only to that term and class association. Faculty and departments have view access only.

Class Associations	Class Components	Class Requisites

Course ID: 126002 Course Offering Nbr: 1
Academic Institution: University of Calgary
Term: Winter 2011 Undergrad
Subject Area: MATH Mathematics
Catalog Nbr: 271 Discrete Mathematics
Session: 1 Regular Academic

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

Associated Class: 1
*Grading Basis: GRD 🔍 Graded
Graded Component: Lecture ▼   *Grade Roster Print: Component ▼
Requirement Designation: 🔍   Primary Component: LEC

Class Components   Customize | Find | View All | 🖾 | ▦   First ◄ 1-3 of 3 ► Last

*Course Component	Contact	Optional	*Final Exam	Auto Create		
Laboratory ▼	13.000	☐	No ▼	☑	➕	➖
Lecture ▼	39.000	☐	Yes ▼	☑	➕	➖
Tutorial ▼	13.000	☐	No ▼	☑	➕	➖

Class Requisites

This page displays the Enrollment Requirements for the specific class.

Enrollment Requisite Summary:

✧ **Notes:**

► **Detail**

This will open the Enrollment Requisite Summary Page. *See Section: Course Requirements.*

View Class Meetings

This page provides an easy way of viewing all of the meetings scheduled for a course. So not sure how you want to change this, but it's not as simple as just pulling up the class event table.

Navigation:

► **Breadcrumbs**
Curriculum Management > Schedule of Classes > Class Event Table

Class Event Table

This page displays the days and time for the event. When using the class event table, it requires an event ID in order to find out what class is conflicting with the room that the scheduler has input. For example, if you receive a conflict while scheduling, note the event ID#; navigate to Class Event Table, insert the ID# and this table will indicate the room the class is already booked in.

7 – Dynamic Class Dates

The Student Administration System allows the definition of terms, sessions, and academic calendars. These three elements are used to determine the significant dates and time periods within each defined session such as: deadlines for drops, withdrawals, last day to register, etc.

A dynamic academic calendar provides more flexibility than static default dates based on term and session structure. In a dynamic academic calendar (courses that are setup using the Non-Standard or Group Study Program), flexible rules are established called dynamic class date rules which enable the ability to dynamically calculate cancel, withdrawal, and drop deadlines and other default dates. These rules can then be applied to calculate the default calendar dates for individual classes. Consequently, the academic institution can create classes that begin and end at various times throughout a session, then dynamically calculate the default dates for individual classes based on the dynamic date rules assigned to classes. The calculations can be overridden on a case-by-case basis.

1. **Class Section Dynamic Dates**

For individual class sections that will have dynamic class dates, use the Dynamic Class Data page to view the deadline dates for the class section.

Class Section Dynamic Dates

This page is used to view the deadline dates set based on the section start and end dates.

Navigation:

► **Breadcrumbs – Enrollment Requirements**
Curriculum Management > Dynamic Dates > Class Section Dynamic Dates

Dynamic Class Data

Class Meeting Pattern

Class Meeting Pattern displays the start and end date of the class section, as well as the class meeting pattern detail for all sections scheduled for that class.

If the deadlines have already been calculated for the class section, this helps determine if the calculated deadlines are appropriate or whether the deadlines have to be overridden or a different rule has to be applied to the class section.

✧ *Notes:*

►This page is for information purposes only to help determine if the deadline dates that have been calculated are appropriate.

8 – Combined Sections

Class sections that are offered at the same time in the same location, e.g. cross-listed and concurrently offered courses, must be set up as combined sections. To combine class sections, each class is associated to a Combined Section ID. Information about the combined room and enrollment capacities can then be entered which will impact registration.

1. **Combined Sections Table**

Within this page, the combined section ID is generated which is a unique identifying number which is used to link the class sections that are being defined.

2. **Identify Combined Sections**

To combine classes, this page is used to select the two or more classes to be taught together and to define their combined enrollment limits.

Define Combined Sections

Navigation:

► Breadcrumbs
Curriculum Management > Combined Sections > Combined Sections Table

Page: Combined Sections Table

Within this page, you maintain the Combined Sections ID numbers and description.

✧ **Notes:**

►View Combined Sections Link: This link leads to the ***Identify Combined Sections Page*** for that ID number.

Identify Combined Sections

In order to combine class sections the following criteria must be met:
- The classes must have identical meeting pattern information (including: days, times, dates, instructors).
- The classes must be in the same session.

For combined classes that maintain the Meeting Pattern and Instructor edits, any changes made to the meeting pattern information for one section will automatically be synchronized to all of the associated class sections.

Navigation:

► **Breadcrumbs**
Curriculum Management > Combined Sections > Identify Combined Sections

Identify Combined Sections

Academic Institution:	UCALG	University of Calgary
Term:	2111	Winter 2011
Session:	1	Regular Academic
Combined Sections ID:	0347	PHIL 507/609
*Combination Type:	Not Applicable ▼	

☑ **Permanent Combination**
Never Select → ☐ Skip Mtg Pattern & Instr Edit
Warning: Mtg Pattern & Instr information will not be shared within the combined section.

Room Capacity

		Total
Requested Room Capacity:	[ ]	
	Enrollment Capacity:	30 20
	Wait List Capacity:	[ ] 0

Customize | Find | View All | ⧉ | ▦   First ◄ 1-2 of 2 ► Last

Combined Sections | Class Description

*Class Nbr	Subject	Catalog Nbr	Section	Status	Reg Room Cap	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Acad Group		
33707 🔍	ENGL	511	01		35	25	0	0	0	AR	➕	➖
33134 🔍	ENGL	517	02		35	25	20	0	0	AR	➕	➖

View Combined Sections Table

✧ *Notes:*

►**Enrollment Capacity**
This controls the combined enrollment of the associated classes. Both the class enrollment limit and the combined limit will be enforced during registration for classes.

►**View Combined Sections Table**
This links back to the Combined Sections Table. See *Define Combined Sections*.

►**Combination Type**
The Combination Type isn't applicable in this component. Combined Sections will be considered permanent combinations and maintained in the Term Roll process.
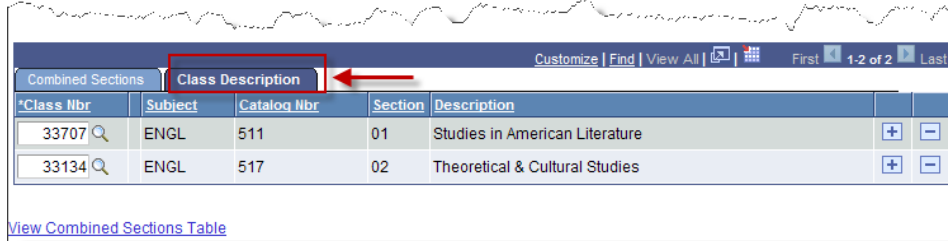
►**Permanent Combination**
The combined section combination will be maintained during the term roll process. Sections will remain combined unless the user removes the combination.

►**Skip Mtg Pattern & Instr Edit (*should never be touched*)**
This functionality would be used if the classes are only being grouped for the purpose of controlling the combined enrollment, and are not scheduled at the same day/time/room.

Class Description

9 – Class Cancellation

When a class is cancelled all currently enrolled or waitlisted students will automatically be dropped from the class.

1. **Notify Scheduling Office**
Prior to cancelling a class, departments must notify the Scheduling Office.

2. **Notify Students**
When a class section is being cancelled, the instructor or department administrator can notify the students by going to the Faculty Center and emailing the students using the information from the class roster.

3. **Cancel Class**
A Faculty or Department can cancel classes if required.

Notify Students

The notification tool is available within the Class Roster, which is found in the Self Service Faculty Center.

Navigation:

► Breadcrumbs
Self Service > Faculty Center

Click on Class Roster beside the selected class:

No Special Format must be selected for the selection column to appear

You can select either notify all students or selected students.

✧ **Notes:**

► **Notify Enrolled Students**
All enrolled students have a University of Calgary email account and the system will send the email to this account, no exceptions.

Notification Page – (Send Email Page):
The Notification will automatically default to your email id, this cannot be changed. To: will also auto populate your email id and this can be removed or additional email ids included. The BCC will automatically list the selected students to be notified. The Subject can be edited as desired. Include the message text and any signature desired.

Class Roster

Send Notification

Type e-mail addresses in the To, CC or BCC fields using a comma as a separator.

Notification from Raif Nottebrock

From:	[redacted] ← Defaults to your email id
To:	test1@ucalgary.ca Defaults to include your email id - can be removed
CC:	You can enter additional email ids if desired
BCC:	test@ucalgary.ca, test@ucalgary.ca, test@ucalgary.ca All selected students will be automatically entered here using ucalgary.ca email ids
Subject:	<From the desk of [redacted] > Enter any desired subject
Message Text:	Include the text of the email as well as the department/faculty signature

SEND NOTIFICATION

✧ *Notes:*

►**Send Notification:**
Copy the student's email addresses and paste them into another email account if you would prefer using a generic dept/faculty email account.
.

Cancelling a Class

The Cancel Class function is part of the Schedule Class Meetings. This is used to cancel a class in which students are already enrolled.

Navigation:

► Breadcrumbs
Curriculum Management > Schedule of Classes > Schedule Class Meetings

Page: Enrollment Control

✧ *Notes:*

►Steps involved to cancel a class are
- check 'Cancel If Student Enrolled' if receive message that there are students enrolled
- change class status
- click the Cancel Class button.

►**Cancel if Student Enrolled**

If enrollment has begun for a class which is to be cancelled, then this checkbox must be checked in order to cancel the class. This check box is considered a safety mechanism to prevent accidental cancellation of a class. If this check box isn't checked and you try to cancel the class the following error will occur.
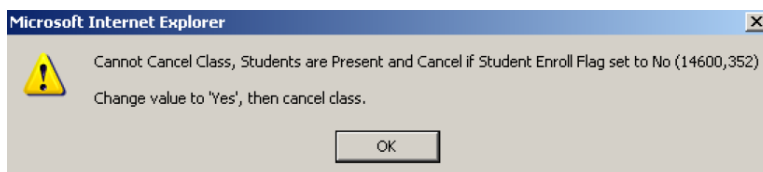
►**Cancel Class Button**

To cancel a class where students are registered the 'Cancel Class' button must be used, this will drop all of the currently enrolled students from the class. Please ensure that all components of the course are cancelled as well. For instance, if there is a lecture and lab in the class, please cancel both components.

Important Note:

Cancelled sections should be removed from the Maintain Schedule of Classes Meetings page for new terms only. Once students have view access to the Schedule of Classes, the section may be cancelled only. The section may be removed from the subsequent Fall/Winter or Spring Summer term schedule. Reference the job aid on the Student and Enrolment Services > Student Administration (PeopleSoft Campus Solutions) training guides.

10 – Course/Class Inquiry Screens

This series of inquiry pages allow staff to search and view class and instructor information.

1. **Class Search**

Users can search the class schedule for a term to find information about classes. The class search pages are the same pages that are available to students through the Student Self Service.

2. **Browse Catalog**

Users may also browse the Course Catalog to access course information and class details.

3. **Instructor Schedule**

This component provides the ability to view an instructor's schedule for a term.

Class Search

The Class Search offers a similar view of the Course Catalog to what the Student sees in the Student Self Service.

Navigation:

► **Breadcrumbs**
Curriculum Management > Schedule of Classes > Class Search

Search for Classes

Enter Search Criteria

Search for Classes

Institution   University of Calgary   — Defaults to current term, change if desired
Term   2161 - Winter 2016

Select at least 2 search criteria. Click Search to view your search results.

▽ Class Search

Subject   KNES-Kinesiology   — Type the subject or select from list
Course Number   contains   260   — Enter Course Number if desired
Course Career   Undergraduate Programs

☑ Show Open Classes Only
☐ Open Entry/Exit Classes Only

Expand View for more search options

▽ Additional Search Criteria

Meeting Start Time   greater than or equal to
Meeting End Time   less than or equal to
Days of Week   include only these days

☐ Mon ☐ Tues ☐ Wed ☐ Thurs ☐ Fri ☐ Sat ☐ Sun

Instructor Last Name   begins with
Class Nbr
Course Keyword
Minimum Units   greater than or equal to
Maximum Units   less than or equal to
Course Component
Session
Mode of Instruction
Campus
Location

CLEAR   SEARCH

✧ Notes:

► The Section link can be used to view the Class Details.
► Note the Class Restrictions (Purple Star).
► Note if the class is a combined section class.

Search for Classes

Class Detail

KNES 260 - 01 Human Anatomy & Physiology II
University of Calgary | Winter 2016 | Lecture

Class Details

Status	● Open	**Course ID**	161531
Class Number	11996	**Offer Nbr**	1
Session	Regular Academic	**Career**	Undergraduate Programs
Units	3 units	**Dates**	2016/1/11 - 2016/4/13
Class Components	Laboratory Required, Lecture Required	**Grading**	Graded
		Location	Main UofC Campus
		Campus	University of Calgary

Meeting Information

Days & Times	Room	Instructor	Meeting Dates
MoWeFr 8:00AM - 8:50AM	TBA		2016/01/11 - 2016/04/13

Enrollment Information

Enrollment Requirements	Prerequisite: KNES 259. (Please see University Calendar for more description.)
Class Attributes	Half-Course GFC Hours (3-2)

Class Restrictions

Restriction Nbr	Start Date	End Date	Reserved Seats	Description
1	2014/04/01	2014/08/06	200	Restricted to KNES students only.

Class Availability

Combined Section Capacity	400	**Wait List Capacity**	0
Enrollment Total	0	**Wait List Total**	0
Available Seats	400		

Combined Section

View Details	Description	Status	Enrl Tot	Wait Tot
KNES 260-01 LEC (11996)	Human Anatomy & Physiology II	● Open	0	0
KNES 260-02 LEC (12576)	Human Anatomy & Physiology II	● Open	0	0

Description

The instructional approach is a combination of systematic and regional anatomy and physiology with some surface anatomy and radiologic considerations. Physiology and anatomy of the cardiovascular, pulmonary, endocrine, renal and gastrointestinal systems as well as anatomy of the reproductive and integumentary systems and special senses will be covered. Laboratories utilize human tissue materials, anatomical models, charts, and prosected cadavers and cadaver specimens. Prerequisite(s): Kinesiology 259.
Antirequisite(s): Credit Kinesiology 260 and any of Biology 305, Kinesiology 261, Medical Science 404, Zoology 269, 361, 363, 461, or 463 will not be allowed.

Textbook/Other Materials

Textbook Assignment Pending (assignments not shown to students)

VIEW SEARCH RESULTS

✧ *Notes:*
___

►Students are able to see the same pages. This is particularly useful if your role includes communicating with students.

►Note the details of the class restrictions and combined sections

►The description may contain antirequisites (reasons the course cannot be taken)

Browse Catalog

Browsing the Course Catalog provides users with a list of courses offered at the institution. From this list users can view course details and access class sections.

Navigation:

► **Breadcrumbs**
Self Service > Search > Browse Course Catalog

✧ **Notes:**

►The list of courses displayed can be refined by selecting the appropriate letter from the alphabetical listing above the list of courses.

♦ **Notes:**

►The Collapse All button can be used to display just the list of courses alphabetically. From this list users may select the desired subject and see a list of course titles for that particular subject.

♦ **Notes:**

► Course title link can be used to show the Course Details.

Browse Course Catalog

Course Detail

Return to Browse Course Catalog

PSYC 205 - Principles Of Psychology

Course Detail

view class sections

Career	Undergraduate Programs
Units	3.00
Grading Basis	Graded
Course Components	Lecture Required
	Tutorial Required
Academic Group	Faculty of Arts
Academic Organization	Dept of Psychology

Enrollment Information
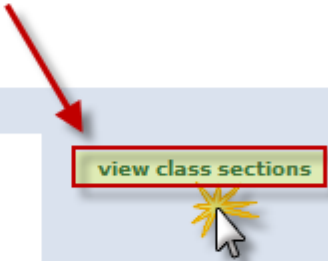
Course Attribute	Half-Course
	GFC Hours (3-1T)
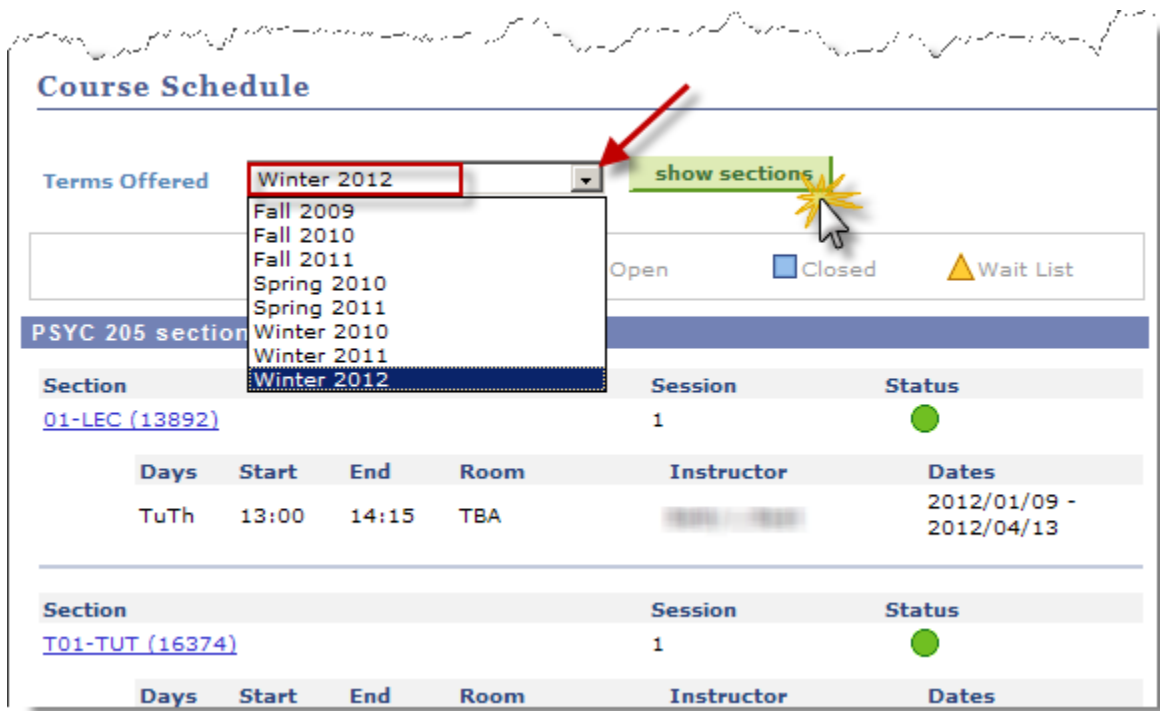
Description

Designed for Psychology Majors. Fundamental procedures, findings, terminology and theories in the major areas of psychology.

Note: This course is a prerequisite for all psychology courses except Psychology 305.

Course Schedule

Terms Offered Winter 2012 ▼ **show sections**

| Fall 2009 |
| Fall 2010 |
| Fall 2011 | Open ☐ Closed ⚠ Wait List |
| Spring 2010 |
| Spring 2011 |

PSYC 205 section Winter 2010
Winter 2011
Winter 2012

Section					Session	Status
01-LEC (13892)					1	🟢
	Days	**Start**	**End**	**Room**	**Instructor**	**Dates**
	TuTh	13:00	14:15	TBA		2012/01/09 - 2012/04/13

Section					Session	Status
T01-TUT (16374)					1	🟢
	Days	**Start**	**End**	**Room**	**Instructor**	**Dates**

✧ **Notes:**

►The View Class Sections button displays the Course Schedule for a Term.

►The Show Sections button can be used to display all sections for the Term.

►Class detail information can be viewed when the Section link is selected.

Browse Course Catalog

Class Detail

PSYC 205 - 01 Principles Of Psychology

University of Calgary | Winter 2012 | Lecture

Return to Browse Course Catalog

Class Details

Status	● Open	Career	Undergraduate Programs
Class Number	13892	Dates	2012/1/9 - 2012/4/13
Session	Regular Academic	Grading	Graded
Units	3 units	Location	Main UofC Campus
Class Components	Lecture Required	Campus	University of Calgary
	Tutorial Required		

Meeting Information

Days & Times	Room	Instructor	Meeting Dates
TuTh 13:00 - 14:15	TBA		2012/01/09 - 2012/04/13

Enrollment Information

Class Attributes	Half-Course GFC Hours (3-1T)

Class Availability

Class Capacity	300	Wait List Capacity	0
Enrollment Total	0	Wait List Total	0
Available Seats	300		

Notes

Class Notes	Notes: This course is a prerequisite for all psychology courses except Psychology 305. Psychology courses are subject to enrollment restrictions. For complete information, please refer to Enrollment Services restricted courses page: http://www.ucalgary.ca/registrar/students/restrictions

Description

Designed for Psychology Majors. Fundamental procedures, findings, terminology and theories in the major areas of psychology.

Note: This course is a prerequisite for all psychology courses except Psychology 305.

Instructor Schedule

Department Staff can navigate to this page to view Instructor Schedules. This is for display only, and no data can be entered.

Navigation:

► Breadcrumbs
Curriculum Management > Instructor/Advisor Information > Instructor Schedule

Instructor Schedule

This page contains information related to the time and weekday schedule of the instructor.

Instructor Schedule 2

This page contains information related to the session schedule of the instructor.

11 – Unlock Resource Queue

The resource queue is used to prevent the system from double booking facilities. When the system begins the process of saving changes to the class schedule, the system inserts a row in the resource queue table. This row signifies that someone within the organization is currently scheduling facilities. If another user

attempts to reserve the same facility the system will present them with a message that resources are currently being allocated to another process and they must wait. When the scheduling process completes, the row is removed from the Resource Queue table. On occasion, system-wide or local client workstation errors may cause the row to remain in the table, thereby preventing the scheduling of classes. The Schedule Office has the ability to unlock the Resource Queue. The Resource Queue Cleanup page is intended to allow a system administrator to view information about the lock and to unlock a resource.

Navigation:

► **Breadcrumbs**
Curriculum Management > Schedule of Classes > Resource Queue Cleanup

Unlock Resource Queue

Staff will receive the following message when saving a class when the Resource Queue is locked; it indicates the User that has the Resource Queue locked and the date/time stamp the lock went into effect. If you receive this message, please notify Scheduling to unlock it.
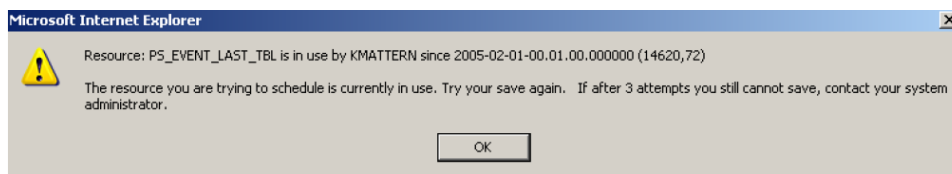
If the resource queue is not released within 5 minutes then the Sustainment Team can follow up if appropriate, using the 'Resource Queue Cleanup' to unlock the resource queue.

12 – Scheduling Reports and Queries

Several reports and queries have been designed for use at the University of Calgary. These reports can be run by Department and/or Faculty offices and the Scheduling Office.

Scheduling Reports

1. Course Summary List
Summary list of courses with basic course information and identifies whether these courses are scheduled for the selected term.

2. Course/Class Requirements
This report contains all of the course and class level restrictions that have been set for courses.

3. Detailed Class Schedule
Using Excel, this provides a detailed listing of the class schedule used for editing and reviewing the details of the schedule for each class for a term. Please consult the Scheduling office if you have any issues running this report.

4. Instructor Schedule Listing
A list of an instructor's teaching assignments for one or more terms.

5. List of Full Classes
This report provides a listing of classes which are currently full.

6. Non-Standard Class Dates
This report lists classes with non-standard class dates.

7. Schedule of Classes (Timetable)
This report is a master schedule of classes for one or two terms. Provides a complete listing of all classes offered or can be run for a specific Department/Faculty.

8. Compare PeopleSoft/Astra
(*Used by Enrolment Services Staff only*).
9. Course & Sched. Inconsistency
(*Used by Enrolment Services Staff only*).

Queries

1. **Summary Class Time/ Registration**

This query provides a summary listing of the scheduled classes with basic day/time/room and class enrollment information for a term.

2. **List of Classes Without Rooms**

This query provides a listing of classes without assigned rooms with related student registration information.

3. **List of Classes Over Room Capacity**

This query provides a listing of classes where the enrollment has exceeded the indicated room capacity.

4. **List of Class Comments**

This query provides a listing of the class comments that have been created for classes for a given term.

Scheduling Reports

Navigation:

► Breadcrumbs
Curriculum Management > Scheduling Reports

Scheduling Reports

Scheduling Reports navigates to different available reports.

This page is an example of the run control page for the reports and where the user specifies the criteria. For this example we have used Winter 2016 and Faculty of Nursing.
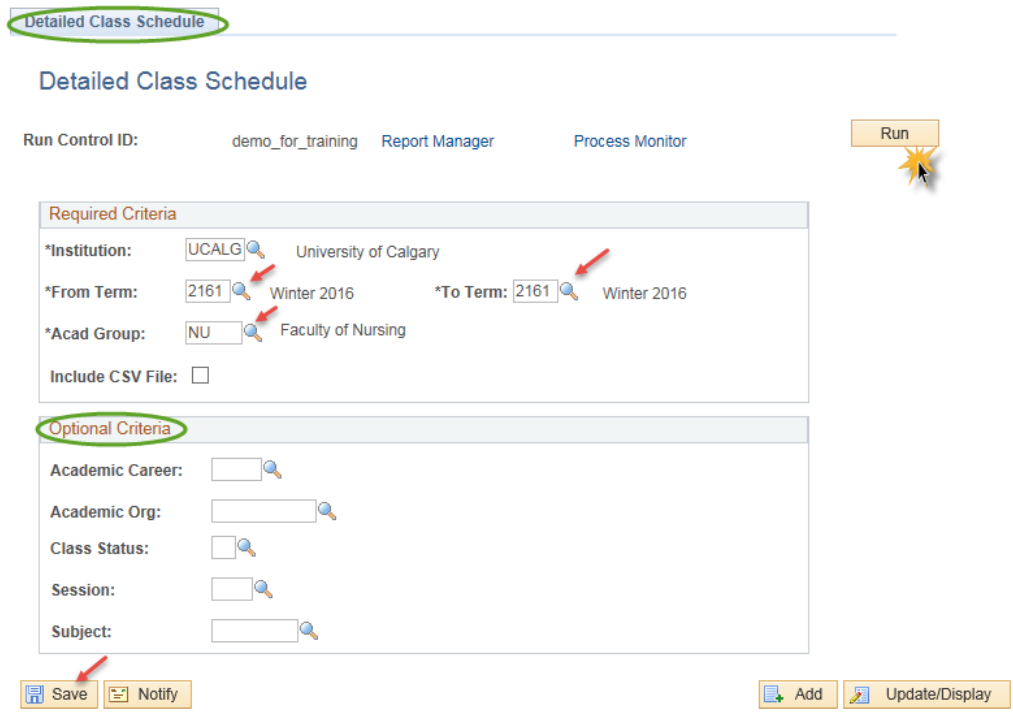
✧ *Notes:*

►Each report can be run based on the user specified information.

Queries

Navigation:

► Breadcrumbs
Reporting Tools > Query > Query Viewer

Query Viewer

This page will be used to search for all queries associated to the timetabling process.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By [Query Name ▼]   begins with   [UCTT   ×]

[Search]   Advanced Search

Search Results

*Folder View [-- All Folders -- ▼]

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
UCTT_CLASSES_WITHOUT_ROOMS	Classes with no rooms assigned	Public		HTML	Excel	XML	Schedule	Favorite
UCTT_CLASS_COMMENTS	List of Class Comments	Public		HTML	Excel	XML	Schedule	Favorite
UCTT_CLASS_OVER_ROOM_CAPACITY	Classes over room capacity	Public		HTML	Excel	XML	Schedule	Favorite
UCTT_COURSE_REG_STATS	Summary Class Time / Reg'n	Public		HTML	Excel	XML	Schedule	Favorite
UCTT_INCONSISTENT_FACILITY_ID	List Inconsistent Facility ID	Public		HTML	Excel	XML	Schedule	Favorite
UCTT_MISSING_EVENT_ID	LIst Missing Event ID	Public		HTML	Excel	XML	Schedule	Favorite

Personalize | Find | View All | 🗗 | ▥   First ◀ 1-6 of 6 ▶ Last

✧ *Notes:*

►Users can search for timetabling queries by entering UCTT in the 'begins with' field. This will only result in queries for timetabling.

Institution: [UCALG 🔍]
Acad Org: ([NU   ] 🔍)   **Enter applicable criteria for Acad Org, Career and indicate Term**
Acad Career ([UGRD 🔍)
Term: ([2167 🔍)
[View Results]

►The 'Run to HTML' option opens a new window where the Query results can be viewed or downloaded to either an Excel Spreadsheet or a Comma Delimited Text file.

►The 'Run to Excel' option allows users to download an excel file that can either be 'Opened' or 'Saved'. Once 'Saved', the columns can be sorted as required. You can also print the Query results using Excel's print function.

►Users can include the timetabling queries by clicking on Add to Favorites. These queries will always be listed on the search page as a Favorite.

Appendix I - Help

Student and Enrolment Services Training website – http://www.ucalgary.ca/registrar/training

Instructor Checklist
Department and Faculty schedulers can use the Instructor Checklist to ensure instructors are set up correctly in the system.

Timetabling Checklist
Department and Faculty schedulers can use the Timetabling Checklist to ensure your course is scheduled correctly.

Scheduling Office Guidelines and Procures are also posted on the website as well as both checklists; Instructor Checklist and Timetabling Checklist.

Student and Enrolment Services > Student Administration (PeopleSoft Campus Solutions) Training Guides > Schedule of Classes – Timetabling

IT Support Center
Phone: 220-5555 option
Email: itsupport@ucalgary.ca

Enrolment Services
Email: schedule@ucalgary.ca

Appendix II – Instructor Roles

Instructor roles are not tied to payroll information for a person. The application of an instructor role is based on the following guidelines.

A. Teaching Roles

The following instructor roles are considered teaching roles and apply to people who are involved in the teaching activity of a section. Do not use these instructor roles for people who need access to class lists for marking or are otherwise assisting the teaching instructor. People indicated with the following teaching roles **will be included in reports of teaching activity**.

PI   Primary
Used when only one instructor is teaching a section. **Don't enter more than one PI instructor per section.**

AL   Alternate
Used when two or more instructors are teaching one section, but are not in the classroom at the same time. Can also be used when instructors split the teaching of a section over time, for example, one teaches the first half of a term and the other teaches the second half of a term. **For each instructor attributed with an AL instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

SI   Simultaneous
Used when two or more instructors are teaching one section simultaneously. **For each instructor attributed with an SI instructor role, indicate a percentage of time spent in the classroom teaching.** Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

Used when the section is taught on a one-on-one basis with students (individual instruction). In this case enter 100% workload for each SI instructor listed.

TA   Teaching Assistant
TA can be used instead of PI in the case of a teaching assistant teaching a laboratory or tutorial section. **Do not enter TA in sections where the TA is not teaching.**

In the cases where more than one TA is teaching one section, please indicate a percentage of time spent in the classroom teaching. Percentages can be input on the Workload Tab of the Instructors for Meeting Pattern on the Meetings page in Maintain Schedule of Classes or Schedule Class Meetings.

B. Non-Teaching Roles

The following instructor roles are considered non-teaching roles and apply to people who are assisting with a section. This would include people who are markers, need access to class lists, Blackboard, etc. People indicated with these non-teaching roles **will not be included in reports of teaching activity**.

CO   Coordinator
Can be used for people who are lab coordinators.

RD   Reader/Demonstrator
Can be used for people who are markers or general assistants to the class.

PERCENTAGE WORKLOAD

Used for multiple entries of instructors (SI, AL or TA) in one section. A percentage workload reflects the amount of time an instructor is teaching a class. The following examples represent instructors entered in one section.

Example 1: Two instructors are teaching one section at the same time.

Smith, John   SI   100.0000
Roberts, Jane   SI   100.0000

Example 2: Two instructors are teaching one section at the same but Roberts is present only 50% of the time.

Smith, John   SI   100.0000
Roberts, Jane   SI   50.0000

Example 3: Four instructors are teaching one 3 hour section per week; different teaching workloads.

Smith, John   SI   100.0000 (3 hours per week for 13 weeks-entire term)
Roberts, Jane   SI   54.0000 (3 hours per week for 7 weeks)
Jones, Jack   SI   23.0000 (3 hours per week for 3 weeks)
Lee, Joe   SI   8.0000 (3 hours for one week)

Example 4: Three TA instructors are teaching one section at the same but Jones is present only 25% of the time.

Smith, John   TA   100.0000
Roberts, Jane   TA   100.0000
Jones, Jack   TA   25.0000

Example 5: Three instructors are teaching one section alternately.

Smith, John   AL   33.0000
Roberts, Jane   AL   33.0000
Jones, Jack   AL   33.0000

Example 6: Three TA instructors are teaching one section alternately.

Smith, John   TA   33.0000
Roberts, Jane   TA   33.0000
Jones, Jack   TA   33.0000

Example 7: Two instructors are teaching one section alternately

Smith, John   AL   65.0000
Roberts, Jane   AL   35.0000