Creating Your Term Schedule

MAY 2017

Agenda

- Academic Scheduling Cycle
- What is course roll? How does course roll work?
- Running a Class Schedule Report
- Pulling a Schedule query
- How do I make changes to my schedule?
- Maintain Schedule of Classes in Cardinal Station
- Basic Data tab
- Meetings tab
- Enrollment Control tab
- Reserve Cap tab
- Notes tab
- Exam tab

- Setting up associated classes correctly
- Instructor/Advisor Table
- Is YOUR course ready for registration? (A Checklist.)
- Is YOUR schedule ready for registration? (Another Checklist.)
- After the scheduling deadline

Enrollment Services rolls classes

Classroom changes are ongoing throughout add/drop based on student enrollment.

Schools/departments edit their schedules as needed

Term Begins

A few weeks before the start of term, any classes with fewer than 5 students enrolled may have their ES-assigned classroom assignment removed.

Registration begins. Only classes with room assignments are active in student view/open for enrollment.

Schedule opens to student view one month before registration begins.

ACADEMIC SCHEDULING CYCLE

SCHEDULING DEADLINE

Departments must request further changes through ES

ES cleans up data and downloads it into 25Live

Bulk classroom assignments made using 25Live Optimizer

Assignments generated back to Cardinal Station from 25Live.

Enrollment Services works with departments to resolve classes without rooms.

Change requests are handled in the order in which they are received.

What is course roll?

Course roll is a **STARTING POINT** for developing your term schedule!

Course roll: last *like*term is
copied/pasted to
the term schedule
being created, e.g.
1171 to 1181

Departments have 6-8 weeks to examine the rolled offerings and make edits, additions, or subtractions

After the deadline, departments must request changes via webforms or CUA-Classes@cua.edu

How does course roll work?

Under the default course roll settings:

ROLLS

Active, Tentative, or Stop Enrollment sections
Catalog component
Room characteristics
Meeting patterns
Instructors
Class notes
Class requisites
Hidden courses (stay hidden)

DOES NOT ROLL

Cancelled sections
Combined sections (bound courses)*
Reserve Capacities*

*must be requested each term

It is YOUR responsibility to check everything in the "ROLLS" column to add, correct, or delete information on your new term's schedule!

Departments often overlook editing the instructor info and class note info, which is very confusing to instructors and students.

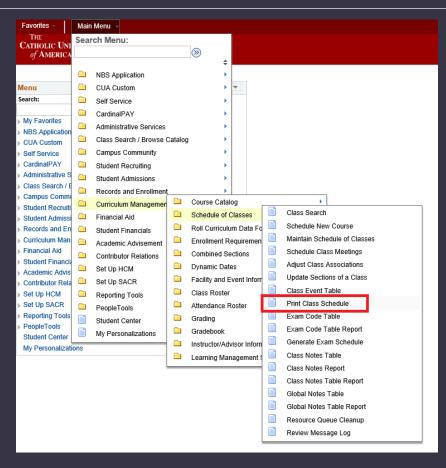
How do I see what courses have rolled?

Class Schedule Report

- A report pulled out of Cardinal Students
- Can adjust options so that the report pulls specific data (e.g. all DD courses, all hidden courses, etc.)
- Courses are listed in catalog number order; data presented neatly (easier for folks less familiar with scheduling, like chairs or faculty, to read)
- Not searchable

Schedule Query

- A query pulled out of Cardinal Students
- Pulls LOTS of data you have to then sort (in Excel)
- Can sort in many, many different ways to compare different offerings
- Could be an overwhelming amount of information for those new to working in Excel
- Comprehensive overview of offerings
- Faster than running a schedule report

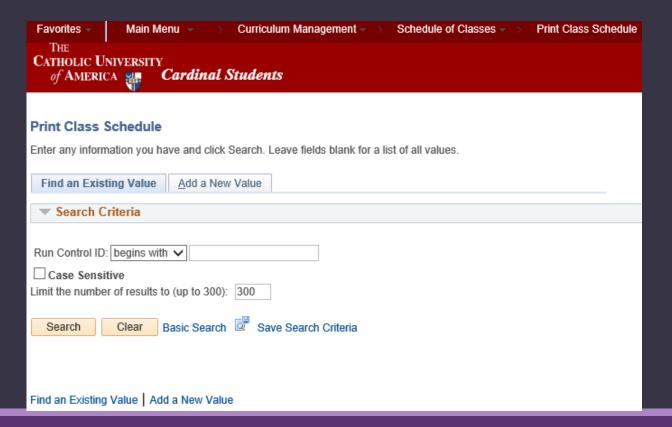


Navigate to:

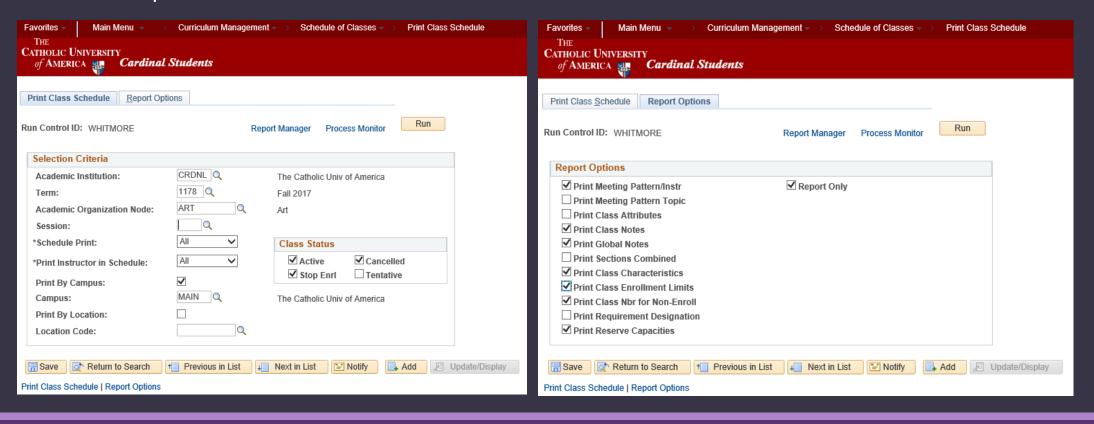
Cardinal Students

- → Curriculum Management
- → Schedule of Classes
 - → Print Class Schedule

Enter a Run Control ID. If you do not have one, click on the "Add a New Value" tab to create one. It can be as simple as your initials or last name. When the results list comes up, click the hyperlink.

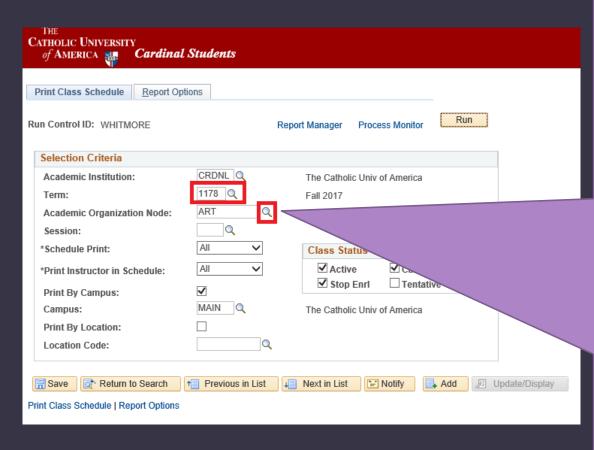


Enrollment Services recommends using the following values on each tab when running a class schedule report. The next few slides will break down each field and what it means.

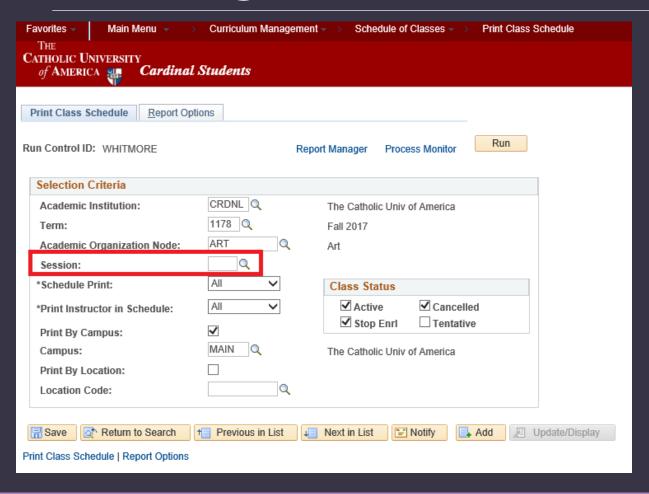


On this screen, enter the term whose schedule you wish to view.

Click the magnifying glass to pick your Academic Organization Node.





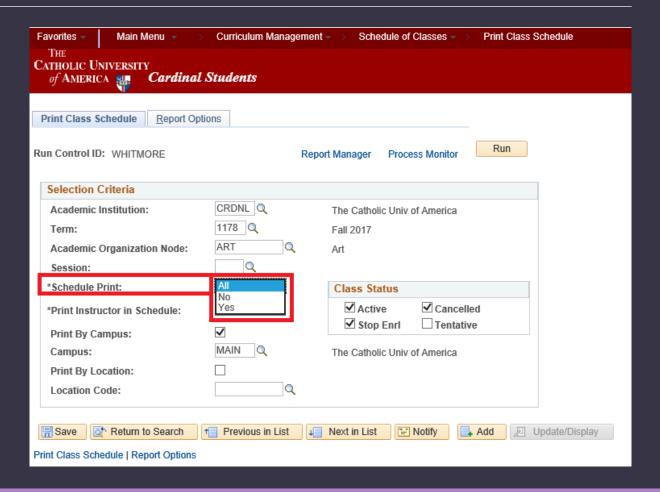


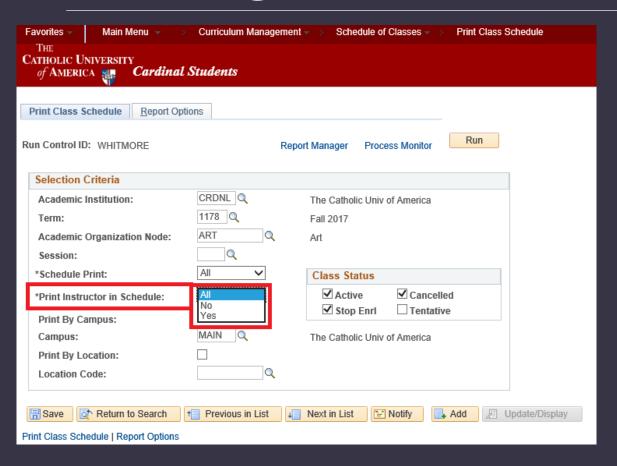
For the "Session" field:

- FALL or SPRING: enter "1" to pull all regular, full-semester courses.
- SUMMER: enter one of the sessions (15, 16, 25, 26, 114, etc.) to pull that individual session
- DD to pull dynamically dated courses
- LEAVE BLANK to pull all scheduled offerings in any session within the term (best option to get a full picture of what's scheduled)

In the "Schedule Print" field,

- "ALL" will pull all offerings
- "NO" will pull any courses currently set *not to print* on the Class Search/student schedule search (aka hidden courses)
- "YES" will pull any courses currently set to print on the Class Search/student schedule search



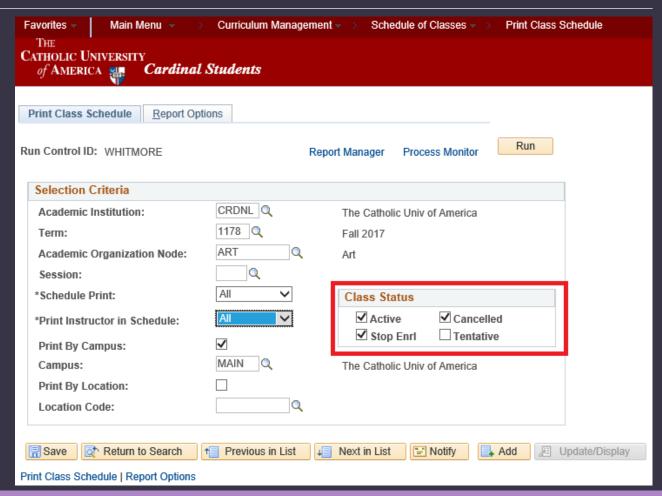


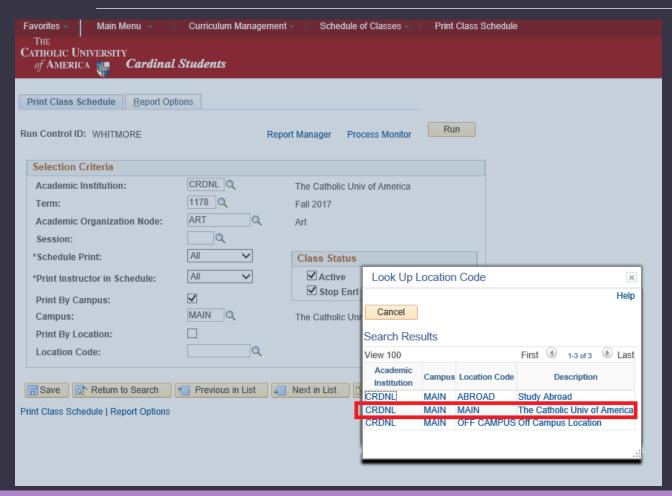
In the "Print Instructor in Schedule" field:

- "ALL" will pull all courses.
- "NO" will pull any courses where the "Print" instructor box is unchecked, i.e. any course where the instructor info is hidden from student search.
- "YES" will pull any courses where the "Print" instructor box is checked, i.e. any course where the instructor info is visible in student search.

In the "Class Status" box:

- Check "Active" to see any any courses that are active
- Check "Stop Enrl" to see any courses that are set to Stop Further Enrollment
- Check "Cancelled" to see any courses that are set to "Cancelled." Note that we do not roll Cancelled courses, so none should appear when you pull this report right after class roll.





You don't need to do anything to the campus field; we only have one campus coded into the system (MAIN).

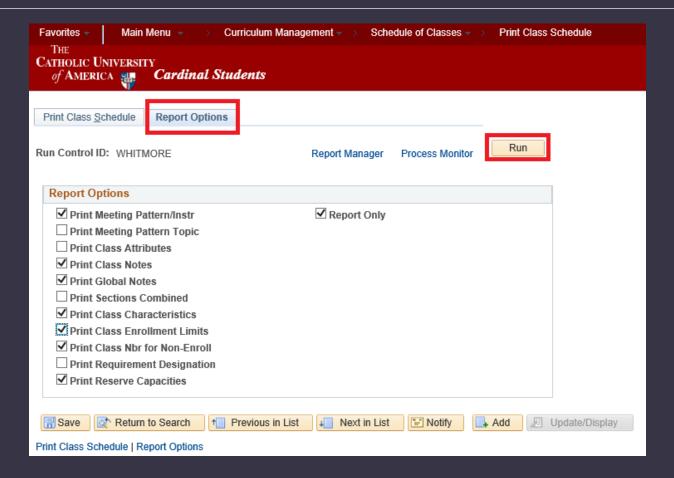
Leaving the location code field blank will pull all of the following: on-campus, off-campus, and abroad classes. If you only wish to see on-campus classes, select the "MAIN" option in the Location code field.

On the "Report Options" tab, check any options you wish to see.

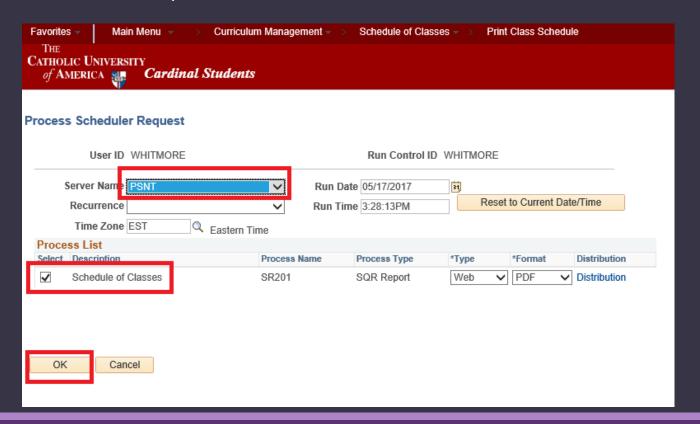
Screenshot shows common/default options.

*

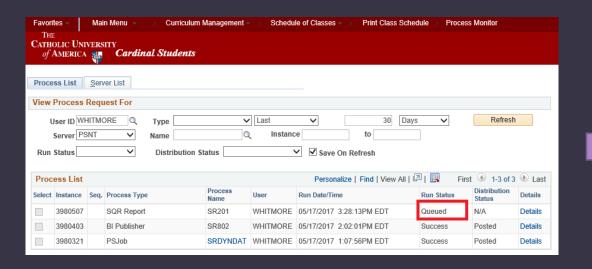
When you have entered all your criteria, click the "Run" button.

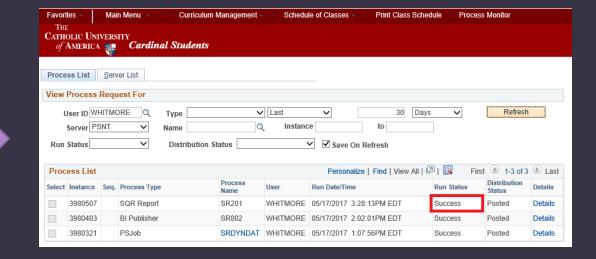


On the Process Scheduler Request page, select the "PSNT" server and make sure the "Schedule of Classes" checkbox is checked, then click "OK."

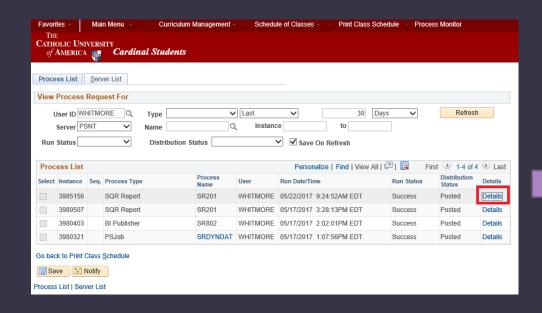


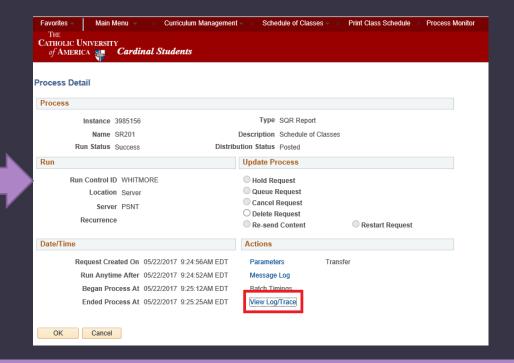
Click the "Process Monitor" link. Your process should appear as "queued." Keep clicking "Refresh" until the process run status shows as "Success" and the distribution status is "Posted."



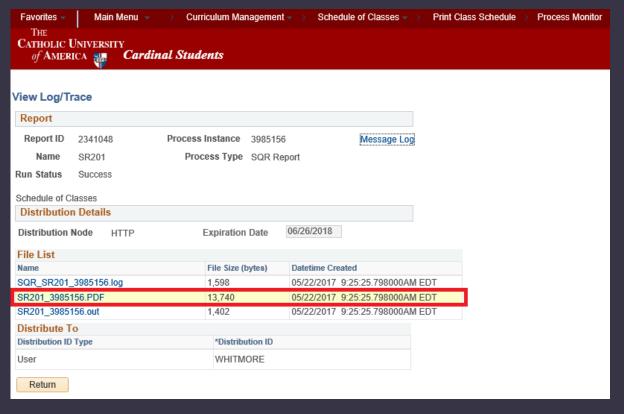


Once the Run Status is "Success" and the Distribution Status is "Posted," click the "Details" link. On the next page, click the "View Log/Trace" link.





Clicking "View Log/Trace" will bring you to a page where you can click a hyperlink ending in .PDF. This should open your Schedule of Classes report in a new tab (make sure pop-up block is off).



Report ID: SR201

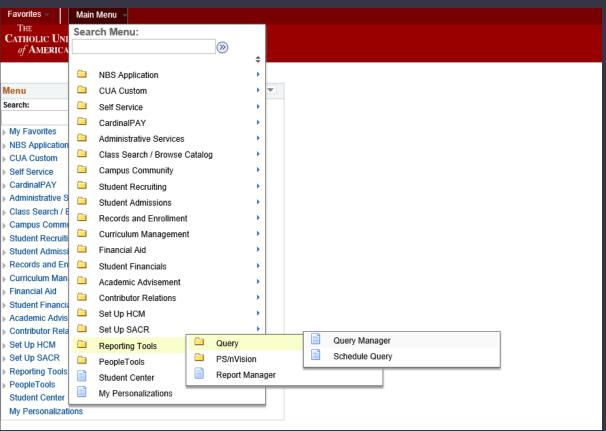
The Catholic Univ of America Schedule of Classes for Fall 2017 Campus: The Catholic Univ of America Regular Academic Session

Run Date: 05/22/2017 Run Time: 09:25:12

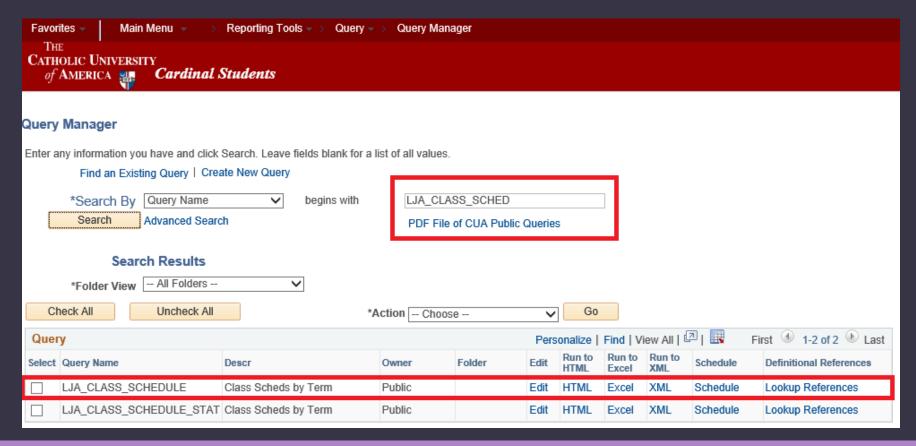
Arts & Sciences - Department of Art - Subject: Art

				ss Nbr Course Title				Component	Units	Topics		
RT	101 0	01	1431	Fundamentals of De		Design		Studio	3			
			_	_				(In Person)				
Bldg:	Salve Regina 1	Hall I	Room: 104	Days:	MW	Time	: 11:1	Dam - 01:40pm		Instructor: Figura, John G.		
Class	Enrl Cap: 16		Class Enrl	Tot: 11	Cla	ss Wait (Cap: 3	Class Wait Tot: 0	Class M	fin Enrl: 0		
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ART	201 0	01	1430	Drawing	& Compo	sition I		Studio	3			
								(In Person)				
Bldg:	Salve Regina 1	Hall I	Room: 103	Days:	TuTh	Time	: 12:4	Opm - 03:10pm		Instructor: Figura, John G.		
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ART	202 0)1	1434	Drawing	& Compo	sition I		Studio (In Person)	3			
										Instructor: Mitchell.Kevin E.		
Bldg:	Salve Regina 1	Hall I	Room: 104	Days:	MW	Time	: 06:4	Opm - 09:10pm		instructor: Mitchell, Kevin E.		
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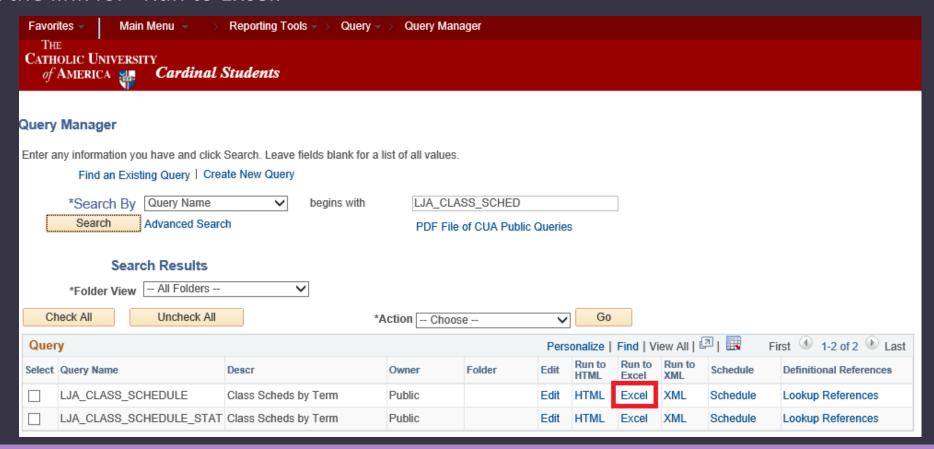
Navigation: Cardinal Students > Reporting Tools > Query > Query Manager



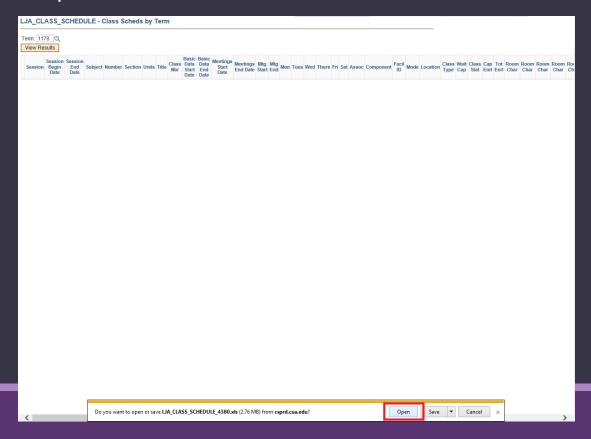
Search for the public query "LJA_CLASS_SCHED." **Make sure your pop-up blocker is off!**



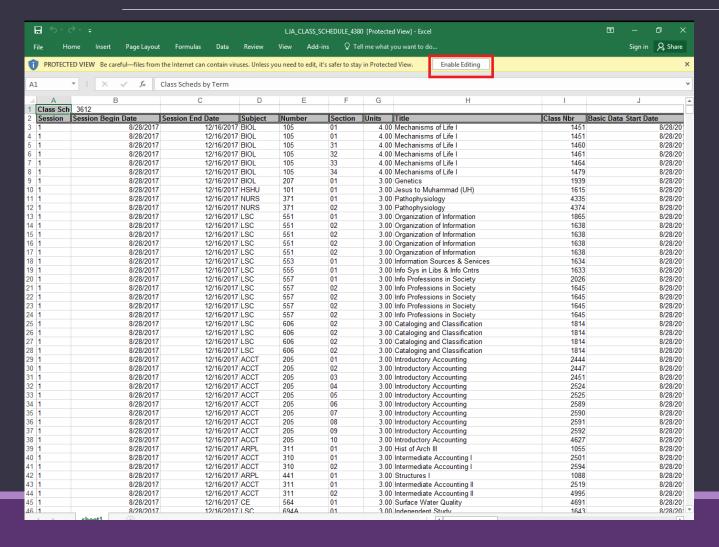
Click the link for "Run to Excel."



A new tab will open with the term prompt. Enter the four-digit term code in the box and click "View Results." When the dialog box appears asking if you want to open or save the query, click "Open."



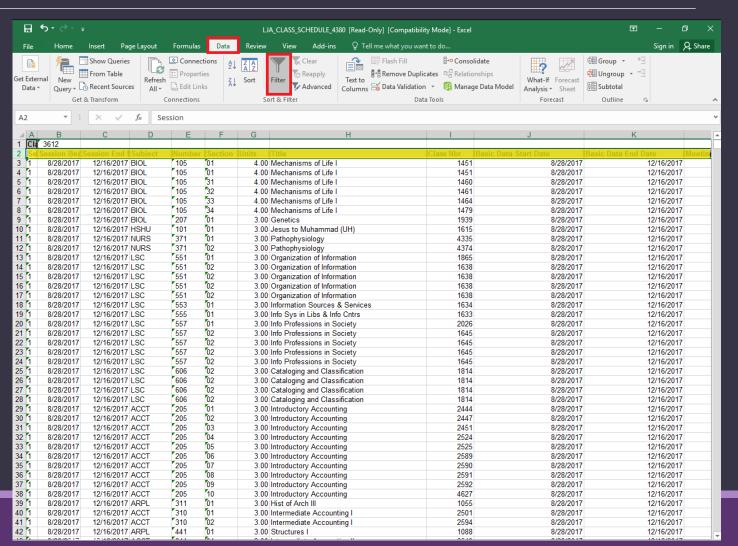
Note: this query pulls a LOT of information! You will need to hide or delete columns to organize it for yourself.

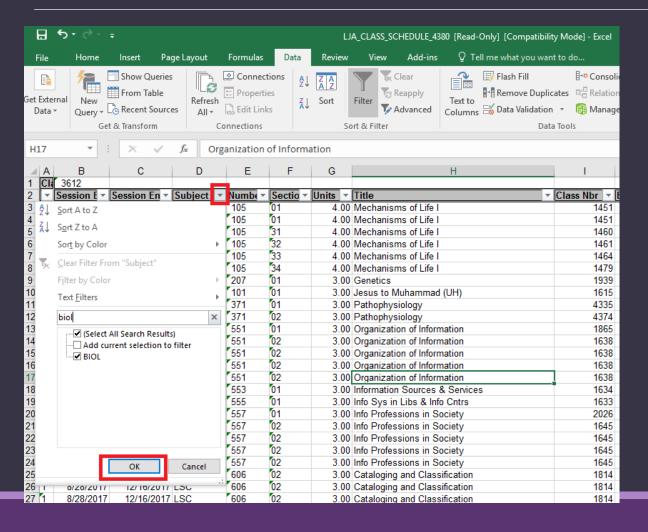


Click the "Enable Editing" button to allow edits.

To filter the results, highlight the header row and then select "Filter" from the Data menu.

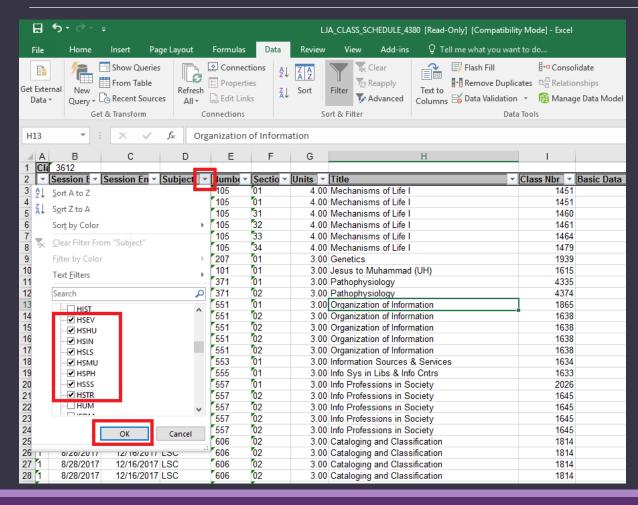
This will cause every column to become sortable via a drop down menu arrow.





You can then click "Subject" and either type your department's subject code or select the checkboxes next to any/all of your department's subject code(s) to show only scheduled classes with that code.

Here, I've typed "BIOL" into the text box, so when I press OK, only 1178 BIOL classes will display.



In this case, I've used the checkboxes to select only Honors classes.

To see what days/times your classes are scheduled for, you can look at the following columns:

- Mtg Start
- Mtg End
- Mon/Tue/Wed/Thurs/Fri/Sat ("Y" means the class is scheduled to meet on that day)

Subject .T	Numb∈ ▼	S	Class 🔻	Mtg Start	¥	Mtg End ▼	N	Tu∈	V	Thui 🕆	F	<u>S</u> =	Assc 🔻	Co ▼	Facil ID	-
BIOL	105	01	1451	12:40:00	PΜ	1:30:00 PM	Υ	N	Υ	N	Υ	N	55	LEC	GOWN 126	
BIOL	105	01	1451	2:10:00	PΜ	3:00:00 PM	N	N	N	N	Υ	N	55	LEC	HANN 106	
BIOL	105	31	1460	2:10:00	PΜ	4:50:00 PM	N	Υ	N	N	N	N	55	LAB	NBIO 157	
BIOL	105	32	1461	2:10:00	PΜ	4:50:00 PM	N	N	Υ	N	N	N	55	LAB	NBIO 157	
BIOL	105	33	1464	2:10:00	PΜ	4:50:00 PM	N	N	N	Υ	N	N	55	LAB	NBIO 157	
BIOL	105	34	1479	2:10:00	PΜ	4:40:00 PM	Υ	N	N	N	N	N	55	LAB	NBIO 157	
BIOL	207	01	1939	12:40:00	PΜ	1:55:00 PM	N	Υ	N	Υ	N	N	1	LEC	MCCT 215	
BIOL	232	01	1465	9:40:00	ΑM	10:55:00 AM	N	Υ	N	Υ	N	N	55	LEC	GOWN 126	
BIOI	232	31	1466	11:10:00	ΔМ	1:40:00 PM	N	Υ	N	N	N	N	55	LAR	MCCT 101	

As you can see above, BIOL 207-01 is scheduled T/Th 12:40-1:55.

OTHER INFO THIS QUERY PROVIDES:

- Class number: the four-digit identifier unique to this course in this semester
- Associated class number: number that links two components (e.g. lecture and lab, lecture and discussion section)
- Component: e.g. lecture, lab, discussion, research, directed reading, etc.
- Facil ID: Room assignment (this will be blank if you pull the query before ES classrooms have been assigned and you have not entered a dept. space pre-assignment)
- Mode: in person, online, blended, etc.
- Room code: The requested classroom characteristics.
- Enrollment: "Cap Enrl" column shows what the course capacity is set to; "Tot Enrl" column shows the number of student enrolled at the time the query was pulled

How do I make changes to my schedule?

Once classes are rolled and you have viewed your schedule, **YOU** must make any needed changes in Cardinal Station.

Navigation: Cardinal Students > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Staff access to view and change the schedule is in Maintain Schedule of Classes. Here, you can edit your class offerings up through the scheduling deadline for the term (usually set 6 weeks prior to when registration for the term opens).

Maintain Schedule of Classes is where all term schedule data is stored. The information students see in Class Search or that your department website pulls comes from Maintain Schedule of Classes.

Things Departments Have Access To Before Scheduling Deadline

- Session (regular, DD, summer session)
- Class section number
- Enrollment vs. non-enrollment
- Location (MAIN, ABROAD, OFF CAMPUS)
- Instruction Mode
- Class dates
- Schedule Print box
- Meeting pattern (days & times)
- Room code
- Capacity (can raise or lower by up to 3)
- Class Notes

Things Departments Always Have Access To in Cardinal Station

- Instructor information
- Department consent required or not
- Class topic

Things Departments Need to Request From Enrollment Services

*Use the handy hyperlinked webforms below!

- Adding a course to the schedule
- Adding additional course sections
- Class status (active, stop further enrollment)
- Adjusting course capacity (by more than 3 before the scheduling deadline, by any number after)
- Reserve capacities
- Bound sections

Email <u>CUA-</u> <u>Classes@cua.edu</u> if you're not sure!

Who does what?

DEPARTMENT'S PURVIEW

- Selecting which course offerings run when
- Deciding course capacities
- Assigning instructors
- Granting dept. consent and requisites not met permission

FACILITIES' PURVIEW:

 Maintaining classroom furnishings/condition

ENROLLMENT SERVICES' PURVIEW

- Checking that department schedules conform to scheduling grid/compliance guidelines
- Assigning classrooms
- Binding courses
- Making schedule changes at departments' request (capacity, binding classes)
- Creating final exam schedule

ACADEMIC DEAN'S PURVIEW

- Liaising w/vice-provost re: post add/drop transactions
- Entering permission time period permissions
- Entering career restriction permissions
- Permission to over-elect

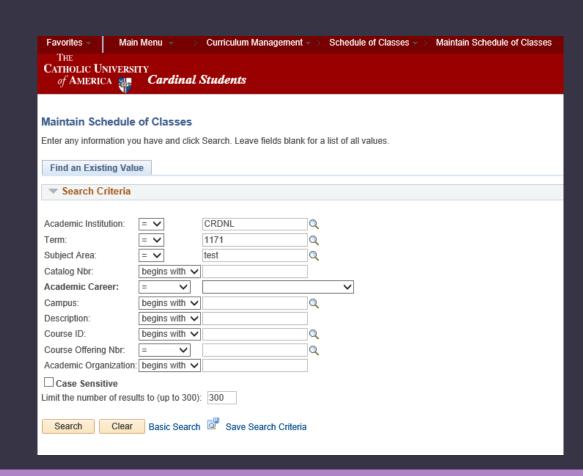
TECH SERVICES' PURVIEW:

- Maintaining classroom technology
- Installing software
- Blackboard

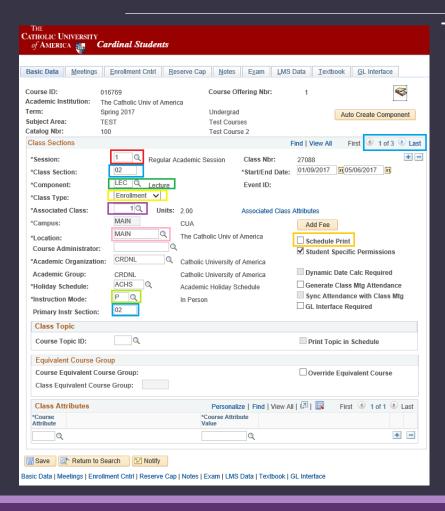
Maintain Schedule of Classes

- 1. Academic Institution: Always CRDNL
- 2. Term: Type in four-digit term code OR click on magnifying glass icon to select the desired term from the list.
- 3. Subject area: Type in the subject area OR click on the magnifying glass to select the desired subject code from the list.
- 4. Catalog Nbr: Enter the catalog number (e.g. the catalog for MATH 108 is "108"). If you leave this blank, the results will show all course offerings that were scheduled for the entered subject code and term (even canceled sections).
- 5. Academic Career: If you wish to limit your results by career (undergrad, grad, etc.) you can select that career from this drop-down menu.

When you've entered the options you want, click "Search."



Basic Data Tab

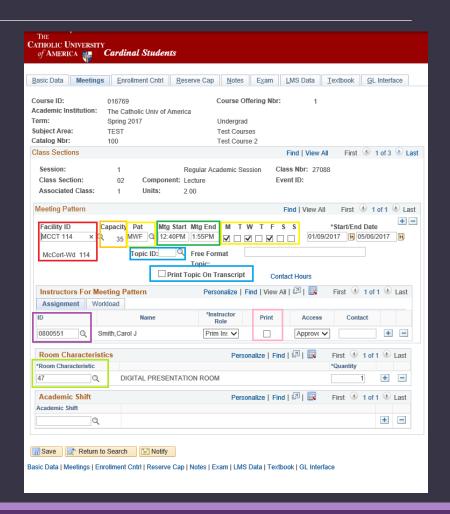


This is the default landing page. Important fields you might adjust:

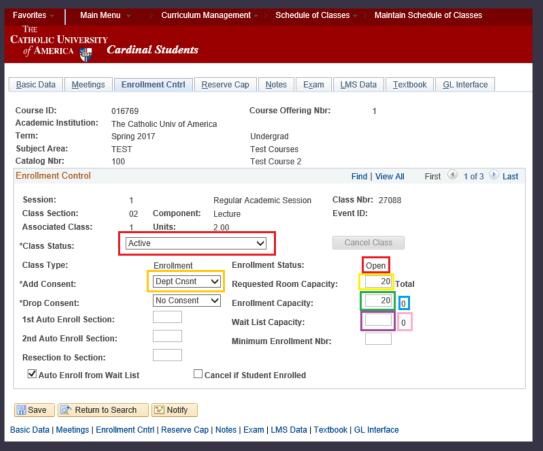
- Session: The length of time the course meets. (More info <u>here</u>.)
 - Fall or spring: session 1 for regular/full-semester courses; DD for dynamically dated courses
 - o Summer: 111, 114, ON1, 15, 16, ON2, 25, 26, or DD
- Class Section: Individual section number. Use the arrows to move between the different sections if more than one is scheduled.
- Component: Type of course (set in the course catalog), e.g. lecture, discussion, lab, seminar, directed reading, etc.
- Class type: Enrollment for courses students can register for (lecture sections); non-enrollment for required additional components (discussions, labs, screenings, etc.)
- Associated class: Links different course components together
- Location: MAIN, ABROAD, or OFF CAMPUS
- Instruction mode: in-person, online, blended, etc. (More info <u>here</u>.)
- Schedule print: Defaults to checked. Unchecking will HIDE class from student search

Meetings tab

- *Facility ID: If an Enrollment Services classroom is requested, leave this blank. If you are using department space, type it in here.
- •Capacity: This is the *classroom* capacity of the room assigned, not the number of students enrolled.
- •Pat: Meeting pattern, aka days the class meets (note: the MW, MF, WF patterns are not coded; if using one of those, leave this blank). Make sure checkboxes match what's in pattern field!
- Mtg Start/End: Start and end times of the course (must conform to University Scheduling Grid).
- Topic: If class has topics set in the course catalog, specify the topic here or enter free-form topic. To ensure topic is listed on the transcript, check the "Print Topic on Transcript" box. (More info here.)
- Instructor ID: Person teaching course. Person has to be in the Instructor/Advisor Table.
- Print box: If unchecked, instructor information is hidden in student search.
- •Room characteristic: Indicates which classroom features are desired. Click magnifying glass or check <u>ES website</u> for list of features.



Enrollment Control tab

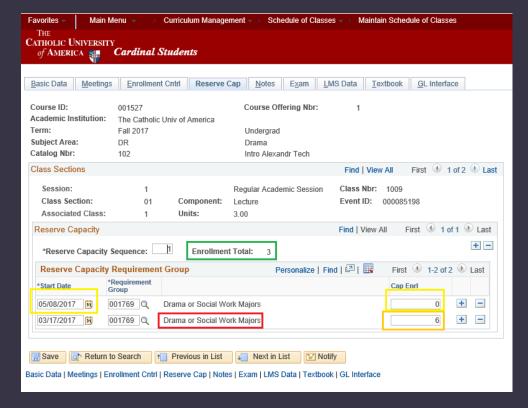


- Class Status: Active, Stop Further Enrollment, Canceled, or Tentative
- Add consent: This is where you set whether or not a course requires department permissions to enroll. "Dept cnsnt" = permission is required; "No consent" = no permission needed (catalog requisites and/or reserve capacities still apply).
- •Requested room capacity: This number is the value the rooming software (25Live) uses to determine what size classroom to assign.
- •Enrollment capacity: This number is the value that Cardinal Station uses to determine how many students it will allow to enroll.
- •Wait List capacity: This number is the value that Cardinal Station uses to determine how many students it will allow to enroll on the waitlist.
- Enrollment Capacity Total: This is the number of students enrolled in the course.
- •Wait List Capacity Total: This is the number of students enrolled on the waitlist for the course.

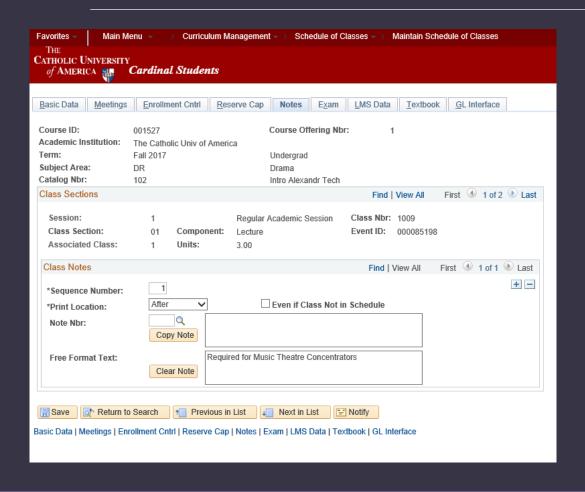
Reserve Cap tab

You won't need to enter anything on this tab; Enrollment Services will take care of it. But you can view reserve capacities on this tab.

- Population: The students (or type of students) the seats are being held for.
- Cap Enrl: Number of seats that should be reserved for that population.
- Expiration: After this date, no more seats are reserved.
- Enrollment total: Number of students that are part of the reserve cap population enrolled in the course (i.e. the number of reserved seats that are taken)



Notes tab



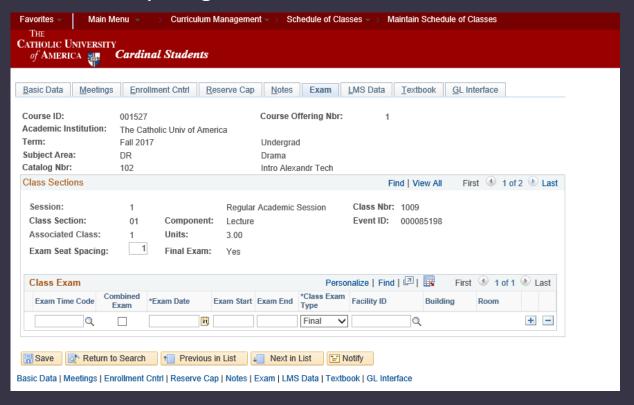
You can add a pre-programmed note by selecting one from the list (viewable by clicking the magnifying icon) or you can enter a free format note by typing in the box.

NOTA BENE (no pun intended):

- You cannot have a canned note AND a free format note on the same row; you must add a row using the plus sign button to add additional notes.
- These notes are INFORMATIONAL only. Students can see them when looking at the course in class search but having the information in a Class Note does NOT affect whether or not a student can register.
- Class notes roll from semester to semester, so make sure you update/delete them if they no longer apply!

Exam tab

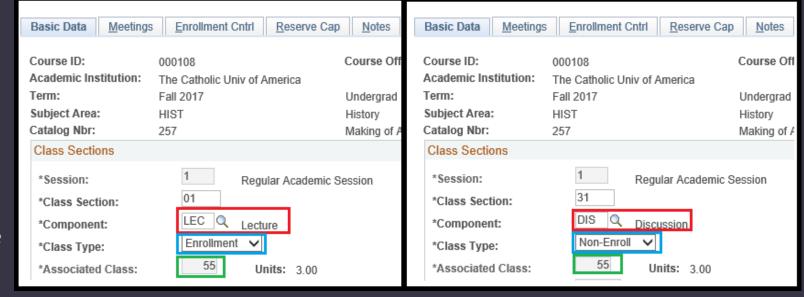
When final exams are loaded into Cardinal Station (usually around midterm), exam info appears here. You don't have to enter anything here!



Setting up associated classes correctly

Courses with associated sections that were scheduled in the previous like term will roll already set up. But if you wish to add a new course with additional required components to a term, you must make sure it is correctly set up.

- Set the Component correctly. One section should be (usually) lecture, the other(s) should be discussion/lab/screening/etc.
- Set the Class Type correctly. The lecture should be an Enrollment section while the other components should be Non-Enroll.
- match. This number defaults to 1; change it to 55 or higher for courses with associate components. If sections aren't associated with each other, they should each have a unique number.



If only one component type is listed, the course is not built in the catalog to require additional components. Email CUA-EnrollmentServices@cua.edu to change this.

Setting up associated classes correctly

CLASS TYPE

"Enroll" = this is a class that students can choose to register for (e.g. BIOL 103-01 lecture section)

"Non-enroll" = this is a class that is a required component of another course. Students cannot choose to enroll in only this class section. (e.g. BIOL 103-31 lab section)

Setting up associated classes correctly

ASSOCIATION NUMBER

This number is what indicates to Cardinal Station that two course sections (an enrollment section and a non-enroll section) are linked.

Example: HIST 235-01 lecture, HIST 235-31 discussion, and HIST 235-32 discussion all have an associated class number of 55.

Both discussion sections are linked to the one lecture section.

Students register for the HIST 235-01 lecture and <u>EITHER</u> HIST 235-31 discussion <u>OR</u> HIST 235-32 discussion.

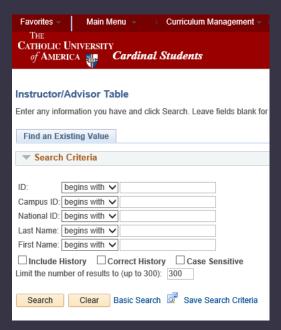
Example: ENGR 102-01 lecture and ENGR 102-31 lab each have the associated class number 55. ENGR 102-02 lecture and ENGR 102-32 lab each have the associated class number 56.

Students registering for ENGR 102-01 lecture <u>MUST</u> register for ENGR 102-31 lab; students registering for ENGR 102-02 lecture <u>MUST</u> register for ENGR 102-32 lab.

Instructor/Advisor Table

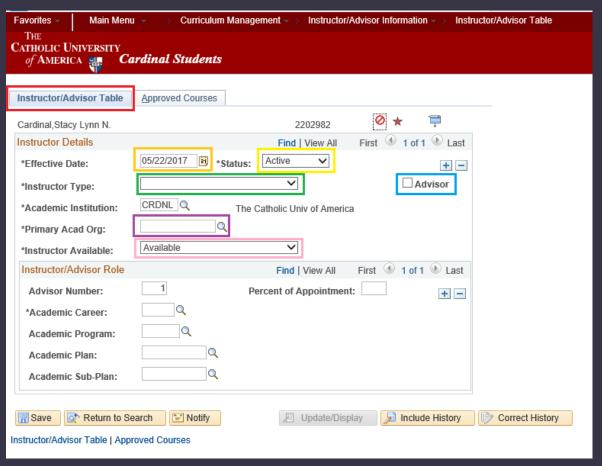
In order to be able to add an instructor to a course, the instructor must be correctly entered into the Instructor/Advisor Table.

Navigation: Cardinal Students > Curriculum Management > Instructor/Advisor Information > Instructor/Advisor Table



- Enter the individual's EMPL ID. Don't search by name, as we have many repeat names here at CUA. The EMPL ID is unique and therefore the best way to search.
- If you don't have the EMPL ID and must search by name, MAKE SURE IT IS THE CORRECT INDIVIDUAL!

Instructor/Advisor Table



On the **Instructor/Advisor Table** tab:

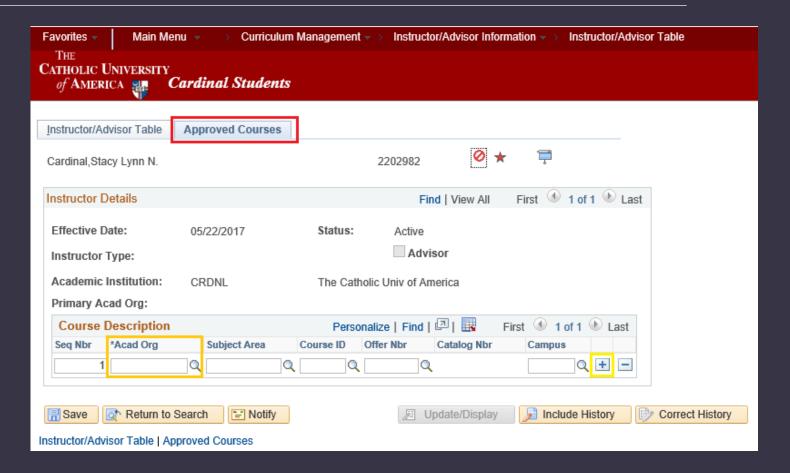
- •Effective Date: Must be a date that *pre-dates* the first day of the term you wish to add the person as an instructor to.
- •Status: Set to "Active."
- •Instructor Type: Set as "Instructor" for staff and "Teaching Assistant" for student T.A.s
- Advisor: Check this box if the person is also an advisor.
- •Primary Acad Org: Use the magnifying glass to select the correct Academic Org for your department.
- •Instructor Available: Set to "Available."

DO NOT CLICK SAVE YET!

Instructor/Advisor Table

On the Approved Courses tab:

- Choose the correct Acad Org
- If the instructor will be teaching in more than one academic org (e.g. Honors and Music), use the Plus Sign Button to add an additional row.
- Now you can click Save.
- This instructor is now available to be added to a class scheduled in Maintain Schedule of Classes.



Is your course ready for registration? Use this checklist.

Session is correct.	instructor not confirmed yet).
Class dates are correct.	
Component type is correct for all sections.	Room characteristics: one primary code is entered (and one secondary code is entered, if desired)
☐ Associated class number matches section number OR is 55+.	☐ Department consent is set if desired.
Location is listed as MAIN, ABROAD, or OFF CAMPUS as necessary.	Requested room capacity and enrollment capacity are set as desired (requested room capacity MUST match or exceed enrollment capacity).
☐Instruction mode is correct.	
□Schedule print box is checked.	☐ Waitlist capacity is listed if desired.
Course topic is entered.	Reserve capacities, if desired, are requested from Enrollment
☐Meeting days and times are correct and match the University	Services.
Scheduling Grid	Class notes have been updated or added, as needed.
Any classroom pre-assignments (in department space you own) are entered.	☐Bound section form is completed for any needed sections.

Is your schedule ready for registration? Use this checklist.

- □ Course meeting patterns follow the <u>University Scheduling Grid</u>.
 □ Classes with non-conforming times were submitted for ES approval using the <u>Non-Conforming Course</u>
 <u>Approval form</u>
- ☐ You have requested any additional courses or course sections added to the schedule using the Course Schedule Request form
- ☐ You have requested any needed capacity adjustments using the Adjust Course Capacity form
- ☐ You have requested any bound classes using the Bound Course request form
- ☐ You have indicated any software needs for specific courses by emailing <u>CUA-Classes@cua.edu</u>
- ☐ You have notified Enrollment Services of any faculty with classroom accommodation needs
- ☐ You have <u>run a compliance report</u> (a.k.a. Class Scheduling Report) and used the data to ensure that your term schedule falls within the compliance guidelines.

After the scheduling deadline

- Email any changes to Enrollment Services at CUA-Classes@cua.edu or use a webform.
 - Capacity changes: http://enrollmentservices.cua.edu/facultystaffinfo/CourseCapacity.cfm
 - Adding class or class section: http://enrollmentservices.cua.edu/facultystaffinfo/schedule-request.cfm
 - Bound course request: http://enrollmentservices.cua.edu/facultystaffinfo/bound-classes-form.cfm
- A moratorium on schedule changes is imposed for about 3 weeks after the FARD while bulk classroom scheduling goes on. Changes requested after the FARD will be made in the order they are received after bulk scheduling is complete.
- In-person classes will only be open for registration when a classroom is assigned.

QUESTIONS?

DON'T FORGET OUR UPCOMING ENROLLMENT SERVICES SEMINARS

Cardinal Students

Tuesday, June 20 - 3:30pm to 4:30pm - McGivney 014 ● Thursday, June 22 - 10:00am to 11:00am - McGivney 014

New Student Processing: From Admit to Enrolled

Tuesday, July 18 - 3:30pm to 4:30pm - McGivney 012 ● Thursday, July 20 - 10:00am to 11:00am - McGivney 012 Thursday, August 17 - 10:00am to 11:00am - McGivney 014 ● Tuesday, August 22 - 3:30pm to 4:30pm - McGivney 014