**CourseLeaf CLSS Schedulers Training Transcript**

8:47
Hello, everybody.

8:49
We're about to get started.

8:50
Thank you all for coming both in person and virtually Mark Hatfield from the registrar's office.

8:55
And we're happy to have Chris from Leapfrog Technologies here to walk us through Course Leaf.

9:00
I just wanted to make a note that we have done a lot of configuration in the system already.

9:06
But there's a good chance that when you go in there, like the rooms that are available to you or the courses might not be quite right or you might see rules triggering at times that don't make sense.

9:14
So we anticipate there's going to be some time for fine tuning the system over the next several months.

9:20
So feel free to reach out if anything looks strange.

9:23
A lot of the Yukon specific rules are going to be presented in the rules themselves when they come up.

9:29
So what Chris is going to show you is just sort of like how the software where works generally.

9:32
But there are some like Yukon quirks in there that we can talk about as well.

9:37
Thank you.

9:41
Thank you, Mark.

9:42
Hello and welcome everyone.

9:43
As Mark said, my name is Chris Kansmer.

9:45
I'm from Leafrog Technologies.

9:47
We're also known as Coarse Leaf because all of our products are named Coarse Leaf.

9:52
Today we're going over the course leave Section scheduler, which we've partnered with UConn to create this for you.

9:59
So this will be the interface where you're going to be updating your information for your schedule for particular terms and then you'll be able to actually submit that information and then it's going to flow over into PeopleSoft.

10:13
So a little bit about coarsely for Leapfrog, we are a technology company based out of Iowa.

10:18
We solely create software for college and universities like yourselves.

10:23
So we are excited to partner with you.

10:27
So as the screen says here you're going to go to academicscheduling.registrar.uconn.edu/W EN.

10:38
So the slash Wen is actually which is the homepage for class Wen was originally the name of the software of what we wanted to call class.

10:50
Kind of a play on words as to when is this going to be scheduled.

10:54
So it kind of evolved to class, meaning course leave section scheduler and now class is just class by itself.

11:02
So that kind of evolved with the name, but the the domain or the directory that you go to kind of remain the same.

11:10
So that helps you remember how to get there.

11:13
Then I did my job today.

11:15
So that's the URL that you'll go to.

11:18
We also encourage you to use Chrome, Safari or Firefox.

11:22
Those are the three best browsers that are maintained for security purposes and we also do most of our testing on those.

11:30
Those browsers.

11:31
You can also use both a Mac and a PC and then also you can use Edge or other Microsoft products, but we really encourage you to use the other ones.

11:42
So just kind of keep that in mind as they kind of update their security more often than those other ones.

11:48
That's why we kind of tailor it a little bit more towards those, but just kind of keep that in mind.

11:54
So there's the URL.

11:56
Once you go there, if you haven't logged in for the day to your single sign in login on your PC or your computer, it'll ask you to put your single sign in Yukon information in.

12:07
So that'll be the same single sign in login that you use for other things throughout your day-to-day work lives.

12:14
So once you're in, then you should be able to navigate through the site.

12:20
So our training today, we're actually going to go through a brief PowerPoint presentation here.

12:24
It's only about 7 or 8 slides.

12:26
And then the majority of the time is actually going to be in the software itself.

12:30
So this presentation on PowerPoints just to adequate or give you information about the software in general.

12:39
So next we'll look at kind of what that agenda looks like for today.

12:45
Yeah, I forgot to start the webcast.

12:48
So could you just repeat like where they should go to log in?

12:51
Oh, OK, yeah, my bad.

12:53
No, no problem.

12:54
Are they on now?

12:56
OK, so to log in, you'll actually go to the URL that you see on the site here academicscheduling.registrar.ucon.edu/W EN and that'll be the class homepage and use Chrome, Safari or Firefox.

13:14
Both PC and Mac Both work great, so either of those is fine on anyone of those browsers.

13:22
Once you go to the site, if you haven't logged in for the day using your single sign in login, you'll actually just use your UConn username and password and then should log you in.

13:32
The slash win is going to be your homepage for class.

13:36
So from there then you can go to the particular term that you need to schedule for.

13:43
Yep, no problem.

13:45
So next we're going to go over what our agenda looks like for the time that we're going to spend today.

13:51
So first, during the slides here, we're going to talk about some terminology.

13:55
So the terminology that we use at Coarse Leaf to define things that you already know in your daytoday work lives is a little bit different.

14:03
So we're going to provide that crosswalk of when I hear instance that actually means term type of conversation.

14:11
Next we'll talk about knowing the alerts.

14:13
So as Mark said in that introduction or if you didn't hear that introduction said that there's policies and procedures that UConn has.

14:21
There's rules that are actually in the system that are developed by the administration team, Mark and company to make it easier for you to add things in this in class.

14:32
So there's rules to say if I add this in, I also need to do XY or Z.

14:37
Those are what we call rules or alerts.

14:40
So we're going to talk about those different kind of alerts and rules and kind of what they'll look for there so you can properly schedule your your departments.

14:49
So next thing, editing the schedule, we'll talk about how you'll be able to access your department, your courses, find your section and then add, edit or update that information.

15:02
You'll then, then we'll go through a process for approved pages.

15:07
Approved pages is something that your chairs and Deans will do.

15:11
As you're updating certain information, it may require them to look at the information and say, hey, that looks great or do something outside of class.

15:21
So we'll talk about what that interface in that process looks like.

15:25
And then lastly, we'll go through some tools.

15:28
These are reporting tools or tools.

15:30
They'll be able to allow you to view your schedule and the information that you are updating.

15:36
So we'll kind of round out the training with that.

15:39
So any questions about our agenda?

15:45
All right, let's get into it.

15:49
So first thing to talk about is terminology.

15:53
So some terms that we use that course leaf, they're a little bit different than yours And don't feel like you have to write all these down because I will send over the PowerPoint for this as well.

16:02
So you'll have that.

16:04
But an instance is what we call in course leaf.

16:07
It's essentially your scheduling time frame or your terms.

16:11
So like for instance, we'll be in Spring 2024 today, Spring 2025 will be a future Spring term Fall 2024 winner 2023.

16:22
These are all examples of scheduling time frames for terms that you're scheduling here at UConn.

16:30
With each within each instance is a scheduling unit.

16:34
And a scheduling unit just represents a group of courses.

16:38
You'll be responsible for editing and updating the schedule for those groups of courses.

16:43
So anthropology is 1.

16:45
We'll look at a biology, math.

16:48
These are all examples of departments or scheduling units within the software.

16:54
So I'll show you where you're able to see those certain scheduling units.

16:58
You'll be able to view that information.

17:01
Other ones you'll actually have access to edit that information.

17:05
So you'll be responsible for updating and submitting your own department, but you'll have view access for all the information within that that instance or that that scheduling units The next item to talk about is a section.

17:20
So a section in terms of class means a scheduling item.

17:24
So a section is essentially a particular course that meets at a particular day.

17:30
So let's say Biology 101, section 001 meets Monday, Wednesday, Friday.

17:36
Mark is the professor that's going to teach that and it has an instruction mode of hybrid.

17:45
So that would be an example of 1 scheduling unit.

17:48
So it's the most finite in that kind of hierarchy of what you'll be updating.

17:54
So that's where you'll spend most of your time adding and updating those sections and that section information.

18:01
Make sense so far, All right.

18:08
So the next kind of term or item to discuss is something called Phases.

18:14
So phases is a way to manage the timeline in your registration and processing system.

18:23
So it phases represents different time periods within that process.

18:30
So there are different rules or different policies or procedures that may affect particular phases but not others.

18:38
This is also going to control what you're able to edit or not edit during those particular time frames or phases.

18:46
So this next graphic is kind of here to illustrate that.

18:51
So starting on the far left there you see there's an arrow for plan.

18:56
Plan is the initial phase that you'll start off in and spring 2024 is actually in plan phase right now.

19:04
So that means that's the phase that you're planning out for your term for spring 2024, for your scheduling unit.

19:11
So you'll go in there.

19:12
That gives you the most access to add, remove sections as needed, update information how you want that.

19:19
That's scheduled to be for your department or your scheduling unit.

19:25
So after that plan phase, and we'll talk about this a little bit later, but you'll submit that for approval.

19:31
Once you've submitted and approved, it'll go into PeopleSoft and then we'll get into what's called the room assignment phase.

19:39
So room assignment there is blue and is blue for a reason.

19:43
The blue indicates that the items within your section are going to be locked out.

19:48
So that means that items that you would normally be able to edit when it was, say, the plan phase, are now not going to be allowed to be editing.

19:56
Because during room assignment phase, the administration team, Mark and company are going to be updating your room assignments in EMS.

20:04
And then that information's then going to flow into PeopleSoft.

20:07
It's then going to flow from PeopleSoft into class.

20:11
So we're going to get those room assignments into class.

20:14
And being that we don't want you to go in and update that information or overwrite that information at that time is going to be set to room assignment.

20:23
So during that time you will be able to view the information essentially, but you won't be able to go in and update anything and then they'll be pre registration, open registration.

20:33
There may be different rules that that occur during those times.

20:37
So we'll talk about that a little bit later on like for instance status.

20:41
So during the plan phase you can delete items during preregistration, open registration, you can't delete a section, but you can make it inactive or restrict the the enrollment.

20:54
So they'll be different things that happen, different rules that apply different policies depending on the the cycle or where it's at within the registration process makes sense so far.

21:08
And then after everything's been planned out, students have been applied to the term and it'll go into locked, which essentially is going to lock you out again, see that it's blue there.

21:19
And then archive is going to mean that it's a historical term.

21:23
There's lots of terms that we have in a class right now that we pull that information, what's been set as that schedule historically.

21:32
So you'll be able to access and view that information.

21:35
Now the information that you're inputting in class will eventually become historical too.

21:39
So you can view it in some of the tools that we'll see a little bit later on.

21:45
But that's phases and and that's how they kind of help you through the life cycle of your registration process.

21:54
Makes sense so far.

21:58
All right.

21:59
So the next thing we'll talk about here is something called modes.

22:03
So modes, and this is clearly defined in each scheduling unit 2 you'll be able to see on the top, is it design mode or is it or is it Refine mode?

22:13
But this essentially tells you how we're speaking to your student information System because the whole premise here is for you to be able to update information and for your your main source of truth that is PeopleSoft or Campus Connection for that to be updated.

22:28
So in order for that to happen, we start out in what's called design mode.

22:32
So in design mode, that's usually again plant paired with that plan phase in the beginning of the cycle where you're able to update as much that information as you can gather and put into class as possible.

22:44
Once you have that information in there, with the analogy here that I'll use with the sandbox, you're essentially building out your schedule for that term, right.

22:52
So you're adding castles or adding sections to your scheduling unit.

22:58
You're removing the ones that you don't need.

23:00
You're getting it ready for turning it in.

23:04
So then you'll turn it in in a process called validation.

23:08
There's literally a button that you'll click called Validate, and what that does is it runs through those list of rules again, make sure that everything is abiding by those policies and procedures, and then it actually sends something into what we call workflow.

23:23
So Workflow is just a way for your Deans and chairs and your registration registrar's office to review that schedule before it actually goes into PeopleSoft.

23:33
Once it goes into PeopleSoft, the mode's going to switch from design mode to refine mode.

23:40
So in design mode, and it says there class is the source of truth because that's where we're having you put all this information into, right?

23:48
So that's our our source of truth bucket.

23:51
After you validate it and push it to PeopleSoft, then the SIS or in this case PeopleSoft is your source of truth.

24:00
So anytime that you then go into a particular section, your kind of user experience is going to be the same, but you're going to go into a section, you'll be able to say, update an instructor, a meeting time, instruction mode, those types of things, save it, and then it's going to flow directly into PeopleSoft unless it has a workflow.

24:22
If it has a workflow or someone needs to approve it, then it'll go through the approval process and then into the PeopleSoft.

24:29
But for the most part, you only have to validate and push that schedule one time as a whole.

24:34
And then after you push it, then we have a back and forth communication from class to PeopleSoft.

24:40
So as information to PeopleSoft updates or class, we're able to talk back and forth together.

24:46
So we have one source of data for the two systems.

24:50
So that's how that kind of works.

24:52
And we'll see an example of that in the approved pages, how it goes through workflow and kind of what the difference is for those approvers.

25:02
So any questions there?

25:07
All right, fantastic.

25:09
So getting started.

25:11
This is also on the bookmarks for those of you that are in person that I handed out along with those slingshot frogs.

25:19
But this is going to give you that step by step of this is specifically how you're going to do things within class.

25:25
So you're going to find your instance, then you're going to find your department or scheduling unit, and then you're going to find the course that you want to update.

25:34
You can add your section or edit a section and then you're going to click a save button and then you're going to see is there any particular alerts that then pop up.

25:46
So that's kind of the natural progression there.

25:49
And then these would be the three alerts or three types of alerts that you might see.

25:54
So again, these alerts are policies or procedures that you can already has in place that are just upheld within class, but in a digital form.

26:05
So three different kind of severities of alerts that you'll see.

26:10
So First off, there's the air, So the air is the red one.

26:15
So it'll literally look like a red stop sign basically just like that.

26:19
And anytime that I see the red, I think of stop sign or air, right.

26:24
And it won't let you save and continue because there's other information or something that you have to update in order for that section to be updated.

26:33
So the air will quite literally tell you what the air is, what you have to fix.

26:38
And then you can go back into the section, fix it, and then click save, and then hopefully you don't have the air again.

26:45
There's also a warning, so a warning.

26:48
I think of that more as keeping with the traffic analogy, this would be a yield sign or a roundabout.

26:55
So sometimes you want to slow down, sometimes you can keep going.

27:00
So it really just depends on what it is and why you're getting that warning, right?

27:04
So the warning's going to say, hey, you may want to take another look at this, but for the most part, you're OK to go ahead and save that information.

27:13
So that would be your example of a warning that you might get.

27:17
And then the last one here would be a workflow.

27:20
So the workflow is going to say I need to have someone else within your institution review this.

27:28
So an example of a workflow is when you're turning in that scheduling unit, moving it from design to refine mode.

27:35
That's absolutely every time going to go through a workflow.

27:38
So your chair or Deans are going to be the one that are viewing that information.

27:43
They'll review your scheduling unit and when it looks good, then they're going to click a button that says approve and then that's going to flow into PeopleSoft.

27:52
So the main take away there, whenever you see the blue with the little people, it doesn't mean that you can't save it.

27:58
It just means that there's going to be some human intervention, right?

28:01
So it's not going to be immediate process to update PeopleSoft.

28:05
There's going to be a little bit of delay and when they actually go in, review it and then approve it and then move forward.

28:11
Does that make sense?

28:15
So both warning and workflow, you can save the air.

28:18
You have to go back and update.

28:21
Sometimes warnings you may want to go back and update information, but those are the, in essence the the three different alerts.

28:30
So any questions, All right, that's great.

28:40
So this is the place for questions, which we don't need so we can go right into the software.

28:46
So if you haven't logged in already, you can log in now if you'd like to and kind of follow along, but I am logged in here.

28:56
A few things to note before we get too far into this number.

29:00
One thing is that the URL that I told you go to is not the URL that I have on my screen.

29:06
And that's by design because I don't have a UConn username and password, right?

29:10
I don't have the SSO login, so I use my Leapfrog login to actually log in to a different URL, but it's the same site.

29:18
So that's what we're seeing there.

29:20
We still want you to go to that URL that we discussed earlier that's on the bookmarks and was on that first slide, but that's going to be a little bit different here.

29:30
Most of what I do, I'm not going to save or update information into your instance.

29:34
So if you're someone who is in anthropology, the main department that I'm going to be updating today, don't worry, I'm not going to be updating your section.

29:43
But that's what that is.

29:45
Also, there is a course leave user that I created for myself.

29:51
I mentioned earlier that you'll only have access to particular scheduling units or your own departments.

29:58
You'll have view access for everything, but most most everything outside of your particular department is going to be grayed out, so you can't edit or save it.

30:08
So to kind of show you that same user experience, I'm logged in as just a coarse leaf user, which is just a standard user that I've given access to anthropology and a couple other scheduling units.

30:21
So for that reason, that's why I'm logged in there.

30:24
You should see your own username and password up there.

30:28
Other things to notice on this homepage, there's this purple area right here and this purple area is actually going to follow you along throughout your journey throughout the software.

30:39
The purple area is essentially a update center, so mark and team will then update information within there.

30:47
So give you deadlines, links to resources, that type of thing.

30:52
So right now there is a link that says if you have any questions or inquiries, e-mail this e-mail right here.

31:01
So that's a great starting point and the future there may be other information, but this purple area will kind of follow you around through the software.

31:11
Other things to notice here we have a historical section, current section and then an early college experience section.

31:21
So these are different areas that break up your particular instances.

31:26
So the far left, the historical, those are all the PeopleSoft terms or instances that we've loaded from your data from PeopleSoft.

31:35
So we've taken that data and we've loaded it into class.

31:39
So that as I talked about earlier, with using our tools, you can use those tools to look at the past data and compare it to current data to help you kind of make decisions.

31:50
So that information is all accessible here.

31:53
Everywhere from the 2018-2019, 20/20/22 and 21 academic years were all loaded here.

32:02
So each one of these are hyperlinks.

32:05
And by a hyperlink I mean a link to a particular term.

32:09
So as you hover over them, you'll see in the lower left hand corner, it tells you it's at slash win and then a unique number that's going to allow you to go to those particular terms and review that information.

32:23
Anything in the historical is going to be in that locked phase.

32:27
So you're not going to be able to update it, but you can review the information, the current column there, that's going to be anything that you're currently scheduling.

32:38
So right now we have the 20/23/24 academic here with summer, fall and spring 2024.

32:44
Spring 2024 is going to be the first term that you're actually going to be scheduling here within class.

32:50
It's going to be the term that we're going to use as our example today.

32:55
And then the early college experience, that's just for those early college experience folks that we're going to have a separate session with them at a different time.

33:03
So for the most part, you can kind of disregard those.

33:06
Your focus is going to be more in this current section here.

33:11
So we're going to click right on spring 2024 right here and that's going to take us into spring 2024.

33:21
So again, this is what we call an instance or a term.

33:25
So we're in spring 2024.

33:27
We can see that up on the top here.

33:29
We know we're in the plan phase, which if you remember the plan phase means that this is the most wide open that is going to be during the scheduling process.

33:39
So that'll help you determine what kind of rules or updates that you can do during this time.

33:45
You'll also notice there's 123 scheduling units, 3578 courses and 11,034 sections.

33:54
So that's for that entire instance of what's been rolled forward from a previous term.

34:01
As we Scroll down, you'll notice all the scheduling units or your departments are all listed out here.

34:09
So you can find the one that you want and click on it and open it up.

34:14
But being that there's 123, I don't really anticipate you doing that.

34:19
You can also go over to the search on the side here and we can type in what we're looking for.

34:25
So for example, if I type in BIOL, you'll notice that that 123 is now reduced to three because it looks for contains within the characters that we put in there and then finds the scheduling units that we could click on.

34:40
We can then click on our scheduling unit and then it's going to take us in there.

34:46
We can also click the back button to go back to our entire search here.

34:52
The other thing I want to show you is the columns here so they're all sortable.

34:57
You see the little arrows there?

34:58
If you want to put them in alphabetical order by ID and click ID, that puts them in alphabetical order.

35:05
So let's say your Air Force studies and you want to see that up towards the top.

35:10
That might make sense.

35:12
Or by name you can do alphabetical order or reverse alphabetical order.

35:16
So if you're scheduling for, say, women's studies, that's a good way to get that item up towards the top.

35:23
That would be useful there.

35:24
Or you can sort by courses numerically.

35:28
You can see who has the most courses, who doesn't have any courses.

35:33
Same with sections.

35:35
Pharmacy has the most sections.

35:38
And then there's lots of scheduling units with 0 sections, some with even just one.

35:43
So those are all sortable and want you to know that that is there.

35:47
But really the main way that you're going to find your scheduling unit is probably going to be with that search.

35:53
So to illustrate this further, I'm going to start typing in anthropology and you see that it narrows it down right away.

36:00
There's the one scheduling unit that we can go into or our Department of Anthropology.

36:05
I'm just going to double click on it and it's going to take us even further in.

36:10
And now we can see all the courses that are currently scheduled in spring 2024 for anthropology.

36:18
So another thing to notice here, as we go deeper into the site, there's this thing called the breadcrumb trail that we call that in the catalog.

36:28
But here it's just the way that you can navigate to these different areas.

36:32
It also identifies we're an anthropology on the top, that we're in spring 2024 and then course the class, this is that slash win home page.

36:43
So if I click on spring 2024, it's going to take me back to that term.

36:48
So you can use that to go back.

36:50
If you're someone who's scheduling for multiple, multiple departments, that's the way that you can go back.

36:55
You can also use your back buttons in the browser.

36:58
That would also work.

37:00
And then course, the class is essentially like a home page that will always take you back to the very first page here.

37:08
So that's how that works.

37:10
I'll also demonstrate how to go back.

37:12
I'm going to click on Spring 24 there.

37:15
We're going to find anthropology just right in the mix here and one of the listings and then it's going to take us all the way back.

37:23
Some other things to point out here we see the amount of courses and sections that are scheduled for Spring 24 for anthropology.

37:32
We also see this in that plan phase and then also design mode.

37:36
So plan phase again tells us whether we're planning for our term.

37:43
Design mode tells us that you as a department, you haven't turned in your scheduling unit for that term yet.

37:49
So that process involves clicking the Validate button, which we'll see a little bit later on.

37:56
But that's how you turn your your schedule in for the year.

38:00
And so if it's in design mode, that means that the source of truth again is class.

38:05
That's where you're putting all your information.

38:08
And that information that hasn't been entered into PeopleSoft yet.

38:12
So just kind of remind you of that.

38:14
And to show you where that's at, on the top you'll also see there's this purple area, which again will have deadlines, other information from the registrar's office.

38:25
And then you'll notice that all the courses are then listed out here as you double click on a course like Anthro 100 and then expands out and shows us all the sections, what kind of what kind of section is, whether it's lecture, discussion, etcetera, who the instructor is and then the day and time pattern for when it's scheduled.

38:50
So you can see all that information just at a glance by clicking and opening up, say Anthro 100 or any of these courses.

38:59
You can also open up all the courses by clicking the Expand All button right there.

39:04
This is actually going to expand Open Anthropology 1000 and all of the other anthropology courses as well.

39:12
So they're all listed out there.

39:15
We go back to the top, there's a collapse all which collapses them all, and then then it takes us back to that kind of default view.

39:26
Another thing I want you to be aware of is that all the courses that are shown here are courses that currently have sections that are scheduled for them for this term, so Spring 2024.

39:39
So it's not an exhaustive list of everything that's in PeopleSoft and I know where your mind's going.

39:44
How do I get those courses in there?

39:47
Well, it's pretty easy.

39:48
The default view is actually not Show them, but they actually exist within class.

39:53
There's this button right here that says show courses with no sections.

39:57
Right underneath that ribbon, that red bar of tools.

40:02
If you click on that, it's going to show us courses that don't have any sections scheduled for that term, but they're actually courses that exist within PeopleSoft.

40:11
So now when we do that, we'll see like anthropology through film here.

40:16
You'll notice that it doesn't have any section information and it wasn't shown earlier.

40:21
And that's because it doesn't have any section.

40:23
So by default we hide it.

40:26
But let's say we need to create a section for anthropology.

40:30
Here, if I go over to the right, there's this green plus button.

40:34
I can click that green plus button that says Add section and it'll allow you to then add a section of that course right within there.

40:44
So that's how you can add new sections to your your schedule by clicking on that green plus button.

40:52
You'd then go through this area right here and update all the update all the fields that you need for your particular section.

41:02
Click the save button and then that's when you would see is there any alerts that I actually need to attend to.

41:10
So in this case, by design and click the plus button.

41:13
I didn't really update anything in general, right?

41:15
So I get quite a few errors here.

41:18
You can see all the red items.

41:20
These are all items that you have to go back and update.

41:23
And then here's an example of what an warning would look like where it's saying that there's no instructor active for the course.

41:32
So it's saying you, you don't necessarily have to, but you should go back and put an instructor in.

41:39
It's probably a good idea, if you know who that is, to go ahead and put that in.

41:43
So more like a yield or roundabout just to double check, Hey, did you forget that or or is that something that you're going to come back to later?

41:52
Does that all make sense?

41:53
So far, Awesome.

41:58
If we click on the bus sign, we can't see what you're saying, right?

42:01
You can.

42:02
Yeah, you can do it right now.

42:06
No, you have to be in your own scheduling unit.

42:09
Are you are you able to update?

42:11
Are you in anthropology and you probably shouldn't be in anthropology?

42:16
Yeah, you'd want to be.

42:18
You'd want to be in your own department that you're scheduled for.

42:22
No, no, this is this is live.

42:24
You can do this right now.

42:26
We actually have workshops tomorrow where you can come and work on this stuff, which is pretty exciting.

42:31
I'll be here.

42:32
We can go through examples if you want.

42:37
That was my way of inviting you all to the workshops tomorrow.

42:41
Yes, question.

42:41
You can't pin your own department, right, because we're just kind of smack in the middle.

42:47
So in other words, when you have looking at that overall list of all the departments in your own SO good question.

42:55
So each one of the different areas that you go into class actually creates its own unique URL.

43:01
So you can save it as a bookmark.

43:04
So once you find it, save it as a bookmark and then you can just go directly there instead of going to the homepage and finding it every time.

43:12
So if you look up here, I'll kind of breakdown what the URL bar tells us.

43:17
So slash win is class, right?

43:20
Then the next number is 1243.

43:22
That's the code for spring 2024.

43:25
And then the next thing tells us we're looking at anthropology, specifically the anthropology scheduling unit.

43:33
So if we were in, say, ecology here, notice how it's slightly different, but kind of the same.

43:40
I'm in ecology and evolutionary biology.

43:44
It's a similar URL, but it's different.

43:47
So that makes it unique so that you can save it as a bookmark and then just go directly there rather than navigating through.

43:54
So it makes it a little easier.

43:56
And then no one's told me what your kind of pattern for term numbering is yet, but if you know what the different term number is, you can actually substitute that out for the future.

44:08
So say you want to schedule for Spring 2025, If you know what that term code would be, you just update that here in the URL.

44:17
If you're logged in, it's going to take you to that that new Spring 2025 or whatever that term is and then you can bookmark it from there.

44:27
Does that all make sense?

44:28
Those are good questions so far.

44:31
Any other questions?

44:35
I'm just curious on the discussion sections are not obviously included as a section in your list because I'm pretty sure that we hold the most seats in the entire university when you showed that.

44:48
So we have like many discussion sections, but those obviously aren't counted in the number.

44:58
Is that correct?

45:00
The ones on the right, like when you when you when you sorted, I'm just curious.

45:06
It's not important, but when you sorted it by the highest number of sections, you're only talking about the highest number of actual classes, correct?

45:17
Yeah.

45:17
It wouldn't be not the discussions.

45:19
Yeah.

45:19
OK Yeah.

45:22
Yeah.

45:23
So it's not by seats, right.

45:24
It's by the actual sections themselves.

45:27
So each section is just one.

45:29
Yeah.

45:31
Makes sense.

45:32
Nope.

45:33
Any other questions there?

45:41
OK, so back to anthropology.

45:45
Where did it go?

45:46
There it is.

45:46
So we're going to click on the anthropology.

45:49
It's going to take us back to the home page.

45:50
Here we talked about how you can see those courses without sections.

45:55
If the course does have sections, same thing applies here.

45:59
There's that green plus button.

46:01
So let's say we needed to add a new section of Anthropology 106 here, a new discussion section.

46:07
I can still click on this green plus button and it's going to bring up that same kind of mini web form, right?

46:14
So I think of this as a web form with essentially just drop downs or other tools that you can fill out that information for that section here.

46:22
The thing to point out is that the section number here, what it does is it actually looks to see what the last number was and then it adds 1 to it.

46:33
So you'll notice that the pattern here for the discussions is to be that number plus D There's no like secret formula that coarse leaf knows that.

46:41
It's like this is the section number that this is going to be when you click the plus button.

46:46
It's just a suggested number based on adding one digit to the previous one.

46:51
So for example, if you know you wanted to make this a lecture and it needs to be 002, you'd actually just go in here, you click in the field, and we'd make this a 002 section.

47:03
Instead of it being a discussion, you just update that field to be whatever it is.

47:09
That's a little bit of a point of confusion when you first start off.

47:12
It does.

47:12
There's no magical formula that says this is what it should be.

47:16
You just have to adhere to whatever your policies are here for UConn for numbering those courses.

47:23
Does that make sense?

47:25
That's it.

47:26
Sorry.

47:26
But it appears that it picks up every single discussion because I'm on 884.

47:31
When I look at mine, just letting it, it's the next in the sequence.

47:37
So you've got to remember that our regionals are in here too.

47:40
It's picking it up.

47:41
So, OK, it's just curious about that.

47:45
I'm sorry.

47:45
I'm not talking into the mic.

47:48
Louise the mic, Louise the mic.

47:53
So the question in the room had to do with the fact that the auto section number suggestion here is 800 and something and it's important to remember that we have all the various sections across all of our regional campuses in here as well.

48:09
So there is a Stanford section out there.

48:11
So this is auto incrementing off the last possible section.

48:16
So one of the things that we'll see a little bit later on is some of the abilities to filter.

48:22
So we're suggesting perhaps creating a filter that you can favorite or bookmark in course leave.

48:28
So that when you're creating that brand new section, you can just quickly see all the section numbers in that class and then go in and then auto increment to the next section on the stores campus or Avery point or wherever you're scheduling for a point.

48:45
Louise.

48:46
Thank you.

48:47
Yep.

48:48
So that's just what that does there is just assume that it's going to be the next digit there.

48:53
So this is the biggest take away there.

48:56
Next thing we're going to do is kind of systematically go through each one of those fields and kind of talk about it, what needs to go in there, what type of rules or expectations you can have for those fields.

49:10
So the first one we're actually going to talk about is the title topic, which is the very first question on here.

49:18
So title topic right here for the most part is going to be default value from what's in PeopleSoft.

49:24
We found out earlier that like on our section and this selected material in Spanish, these are old ones that have been in the data for a while, so for the most part you're probably just going to choose that default value.

49:36
An exception to the rule is going to be Special Topics.

49:40
So in this case we're going to go down to our Anthropology Special Topics, which is 5350 or 5395.

49:49
So if I double click on that, I want to create a new Special Topics section.

49:55
If I click on the plus button here, you'll notice that in the Special Topics drop down.

50:01
If I click on it, there's all the topics that have already been created within PeopleSoft.

50:07
So if I don't want to add one of those, let's just say I leave it as a default and save the section.

50:14
I'm actually going to get an error here that's going to say new topics must be approved for a Special Topics course.

50:22
Because I didn't pick one, I left it as the default value and then it gives you instructions on what to do.

50:29
Essentially you can add your request from the course approval form here.

50:34
So there's other processes that have to be done in order for that to be approved and then put it into PeopleSoft.

50:40
And then once it's in PeopleSoft then you can select it within course leave class.

50:45
So that would be kind of the exception to the rule instead of just selecting the default.

50:51
If it wouldn't be one of these topics, you'd have to go through the process of having it added in through that other process and there is that kind of that guiding rule in there to kind of help you through that if that's what you needed.

51:07
Section number we already talked about there and that's going to add a single digit on there.

51:11
So just add in whatever your next section number should be.

51:16
Credits here is going to be unique for Special Topics and that's why I also came here.

51:22
Because Special Topics, as you can see, allows you to do a credit range for most of your courses and sections.

51:29
There's just going to be the default value from what's in PeopleSoft.

51:33
So here we can actually update what we wanted our credits to be.

51:38
So if we wanted it 2 to 3 credits, we can just type in, click in and update that information and now it's two to three credits.

51:47
I can also make it a singular value.

51:50
I'm just going to say it's 5 credits as long as it's within that date range or that not the date range within that numerical value range, I can put it in.

52:00
So if I put 5 credits in it would let me save it.

52:04
If I'm outside of that range, let's say try and put in as 10 credits here and click the save button, I'm actually going to get a warning that says invalid credits and the credits must be between 16.

52:20
So it's telling me my variable topic or my special topic I have to be within that one to six.

52:25
It can either be a single numerical value or it can still be that range depending on what you need.

52:32
But this is again the exception of the rule.

52:35
Most of the time it's just going to be defaulted to whatever's in PeopleSoft, so that's that value there.

52:43
We're going to move away from the special topics next here and we're going to go back to our anthro one, one of 1006.

52:52
I'm going to go into lecture and this is what for most of your sections, if you're in there, that's what it's going to look like.

53:00
It's going to be grayed out.

53:02
It's going to be that circle with the slash through.

53:04
I call it the Ghostbuster image or emblem because it reminds me of that little Ghostbuster, but essentially it's saying you can't edit that information because it's grayed out.

53:15
That great area.

53:16
That's also what you're going to get if you go to a different scheduling unit that you don't have access to.

53:22
So over here I'm going to go to, yes, Spring 2024 and I'm going to go into accounting, Ms.

53:36
and I'm going to say show courses and I'm going to try and update and create a section.

53:42
Here it's going to tell me cannot create new sections because I don't have permission to create new sections in there.

53:49
If I go into something like just accounting where things are already scheduled, if I try and double click in here and update this information, it's going to update, but then all over is going to be that real little circle with the slash through.

54:11
So that's probably what you're seeing if you're trying to get in the anthropology and you weren't in that scheduling unit.

54:16
So it's going to tell you, you can't update this information, but you have view access so you can view that information.

54:22
You just can't make changes to it.

54:25
This would be what it would also look like if it's in like that room assignment phase where everything's locked out or that locked in archive phase, it's not going to allow you to update the information, but you can view it.

54:38
Does that all make sense?

54:44
So going back to anthropology here, 1006 on the next field here is status.

54:51
So most of your new sections that you're creating during plan phase, you're going to just leave as active.

54:57
Active is just going to mean that they're going to be offered during that term.

55:01
There's also the ability after active to use the cancel section.

55:05
So during the plan and the design phase, the registrar's office wants you to delete the sections rather than canceling them.

55:12
So you can delete the sections by going to the section here, and there's a red X button next to each section.

55:21
You can actually delete out the section information right within here.

55:25
So let's say we don't need this section 012 discussion.

55:29
If I click on it, I'm going to get a pop up that says do you want to delete?

55:35
Are you sure?

55:36
If I click OK there, it's going to go ahead and delete out that section.

55:40
If I click cancel, it's going to cancel that and then retain that section in there.

55:45
So during the design and plan phase, it's preferred for you to delete the sections out that you don't need and then add the sections that you do need after that, say in like the post registration phase and registration phase that we talked about later on.

56:03
Then if there's like enrollment in there, then that's when you would actually use that canceled section.

56:10
And then that's going to trigger for other things that happen behind the scenes, like typically a workflow so that the registrar's office can then move those students to a new section, do some other things outside of class to kind of clean that up.

56:24
So that's when you would use a canceled section.

56:28
There's also stop further enrollment, which is essentially going to stop new students from registering for that section.

56:35
There's a tentative section which you can use that to create sections and then put in them as a tentative section so that there is a holding on them so people can't register for them.

56:49
I see that question just popped up, so if there's anything else that you want to add to that just let me know.

56:56
But some institutions call that like a ghost section where it like you create the framework for it, but it actually doesn't get published out that students can register for it until you would then say have another section that would fill up.

57:11
So you have a second section ready to to populate.

57:14
So then you'd switch that to active and then students could register for that one.

57:19
Do you have anything to add there, Mark?

57:22
Yeah, sorry, just working on some questions in the chat.

57:24
Yeah.

57:25
So tentative is a way to hide A section or if you're not 100% sure if it's going to run, stop for the enrollment is generally used if you're planning to make a big change, but it's pending approval.

57:35
For example, if you're going to be canceling a class or changing the time that could impact enrolled students, you'd want to put it on stop for their enrollment while those changes are pending.

57:50
So that would be status.

57:52
Next is consent.

57:54
Consent's gonna basically say is there special consent for this section, So there's both the So the default is no special consent, right?

58:02
No department, no add sent or no drop consent required or add consent and then there's multiple combinations of department, ad consent, instructor drop consent, etcetera.

58:16
So just selecting the one that makes sense for that section on on what is needed for approval there.

58:23
So that's listed there.

58:25
Grading bias is next here.

58:30
So grading buyers, there are rules to place to guide you through the grading policies and procedures.

58:36
So as you change it to a different grading bias there, it will then prompt different items.

58:43
So for example, honor credit, we found out last time that would be the way to add that as an honor section.

58:50
Registrar, satisfactory, etc Are all listed in there.

58:55
But again, rules and policies in place and then they're actually working on special documentation to send to you to kind of give you the nuances of how to update things.

59:05
So that type of information will come as well.

59:08
But the rules are in place to kind of help you through that as well.

59:12
Next we have is the link to.

59:15
So in this case, there's the link to and this links to either a new group or it can link to a special discussion.

59:24
So in our case, we actually have one lecture but the most multiple discussions.

59:31
Here we had say 2 lectures and then the discussions were tied to either say lecture 001 or lecture 002.

59:43
That's how we would specify that this discussion belongs to this lecture.

59:47
So if it makes a difference, you can do that based on that.

59:51
So within our lecture itself, you'll notice that the link to is set to any all regular academic session groups and then the other field that ties this is the Auto auto enroll half.

1:00:04
In the lecture itself, those fields are kind of set to the default, but if we look at say this discussion here, you'll notice that it's set to new group of that lecture 001.

1:00:17
So linking this discussion to lecture 01 and then also over here there's auto enrollment half also set to 001.

1:00:28
So those two settings together work to link that discussion to that particular lecture.

1:00:35
Any questions there?

1:00:38
All right.

1:00:43
So next we have the combined with and combined with is a way to cross list courses together.

1:00:52
So cross listing of the courses.

1:00:54
Once you cross list the course, there's a primary and a non primary course.

1:01:01
So the scheduling of the instructor, the room and the day and time is all controlled by the primary course and then the secondary course will then follow along with whatever that is.

1:01:14
So as we brought the PeopleSoft data over, there wasn't any of the cross listings that brought were brought over.

1:01:23
But I do have our ecology example here that I can show you of what that looks like.

1:01:29
So Ecology 2244 WE is what we're going to look at.

1:01:36
General ecology, if we open this up, you'll see right away there's additional information here in this column signifying 2 little arrows that kind of cross over each other, hence the cross listed or combined with.

1:01:50
So that's an indication that that course or sections cross listed with another section.

1:01:56
So we can double click on it.

1:01:59
It's going to open up here and then this information is all blanked out in that Gray because it's historical.

1:02:06
But what I really want to show you is the combined with here is saying that this is combined with here.

1:02:12
But then there's this also this purple message indicating that the primary scheduling is handled by another section.

1:02:21
So this is your indicator once you cross list those courses.

1:02:25
This is actually the course that would control who that instructor the day and time in the room meeting is all gonna be controlled by.

1:02:34
So I can go to that other section by clicking on EE B here and it's gonna take me into that section.

1:02:42
So then I could then if this was an active current registration section and update my instructor, my room and my schedule.

1:02:50
But being that it's historical and I don't have an example to show you today, that's kind of the best we have.

1:02:57
So another kind of hint there, if you're someone that does cross listings, I'll come to the workshop time and we'll kind of work through those so that you can see what that looks like.

1:03:07
The main consideration here is that who the primary is, if it's within your own department, you're going to be able to control what that instructor room and schedule is, right?

1:03:18
But if it's cross department, say sociology and anthropology, if that's a cross listed course, you may be able to update sociology courses, but you can't anthropology or vice versa.

1:03:31
So if you make the cross listing, you have to contact that other scheduler to say, hey, I want to update our enrollment to X number or I need to update the instructor to this person.

1:03:44
So you need to be in communication with that other person if you're not the primary control.

1:03:51
Does that make sense?

1:03:55
Yes.

1:03:55
Question fine with are you also identifying each sections individual capacity or do you put all of the capacity in the primary?

1:04:08
Good question.

1:04:08
So the question is when you're cross listing do you put all the capacity in the primary or do you put it in both and it sums the other, it's the the ladder of the two.

1:04:20
So there's actually right here, combined section enrollment.

1:04:25
What this actually does is take the room capacity here of 109 and then if we go back to this other section, this one has 19.

1:04:36
So it actually adds it together for you in that field.

1:04:40
So it does all the mathematics for you and then puts it into that cap and then room cap requested for you, which is nice.

1:04:47
So you can individually do it, but then it it adds it together as a whole.

1:04:52
So good question there.

1:04:56
And again, workshops going to be the best place to do that if you're doing a lot of cross listings or even a couple to come in and we can kind of work through those together at that time makes sense.

1:05:09
Any other questions in the chat, Mark, It's mostly access, so we might have family to get people, all right, sounds good.

1:05:21
I'll keep firing away.

1:05:24
So we go back to Anthropology 106 here.

1:05:26
This is that combined with just to kind of show you how this works.

1:05:30
This is the search area.

1:05:31
So if I start typing in my subject code and say anthropology, this is going to give me a drop down of all the current sections that are available.

1:05:39
So then you just find the one that you want.

1:05:41
You'd probably also want to make it a little more specific.

1:05:45
So if I do 106, it's just going to give me all the discussions for 106, but you'd find what you want to cross this to it with.

1:05:52
Not a good example, I know, but just kind of showing you the more you type in, it's going to narrow down those results even more.

1:05:59
So that's what that combined does.

1:06:02
Session for most everyone is going to be regular academic.

1:06:06
The only other option is that ECE which they're going to have their own scheduling time tomorrow.

1:06:12
So most all the time it's going to be that regular campus location.

1:06:19
Depending on the scheduling unit, they have regional campuses that are available.

1:06:24
So here you'll notice there's the stores location plus the Yukon and several others here.

1:06:30
But we're in anthropology for another scheduling unit.

1:06:34
Maybe they will not have access to add those because they don't have courses or sections at at those other locations.

1:06:42
But from here, you just want to choose the one that you want.

1:06:45
Again, there's that search.

1:06:47
So if I know I wanted a location at Hartford, I can start typing it in and then select that location from there.

1:06:57
Next is instructional mode and this is just going to be what that instructional mode or methods going to be.

1:07:04
So choose the instructional method that makes sense.

1:07:07
There's also rules in place for these.

1:07:10
So for example, there's a by arrangement here.

1:07:15
If you choose by arrangement and I have a schedule in place and I try and save, I'm going to get in the air that says if you're instructor mode is a R or by arrangement is what that stands for.

1:07:29
Cannot have a room so it would have to be no room required.

1:07:34
So this is an example of what we call verbose reporting in class rules.

1:07:41
Essentially, there's two aspects of this rule that go together and you can see both of these are in red.

1:07:47
You may have a time where you update something and you see multiple things down here, but only one of the two could be read and that indicates that that's the specific thing that we want you to go back and update that is violating that policy.

1:08:01
So we kind of hone you in on this is what you have to go back and look for.

1:08:06
In this case, it's both of them.

1:08:08
They're both being violated at the same time.

1:08:10
We have instructional method AR with the meeting pattern and then we also need to update the room to no needed.

1:08:17
So there's two things that we have to do there.

1:08:19
If I'd go back here and let's just say I change this to no room needed and click save, I'm still going to get that first one that's still violated.

1:08:29
So you notice how one's not read anymore, but the other one's read.

1:08:33
That's what we call that verbose reporting.

1:08:36
So it kind of hones in on this is what you need to go back and update.

1:08:41
Make sense there?

1:08:45
All right.

1:08:46
So moving along.

1:08:47
Next we have scheduled print.

1:08:49
So scheduled print is Yes or No, so the default is set to Yes, and then you'd only want to use NO if you want to hide this section.

1:08:59
So if you want to have it created but then hide it, you'd set that to NO.

1:09:05
Otherwise, if you want students to be able to schedule for it, that'd be set to Yes.

1:09:09
There, a component for the most part is going to be defaulted to whatever it was brought over in.

1:09:16
So in this case we rolled it over as a lecture and then the other items are set as discussion.

1:09:22
So we have lecture or lecture standalone that can be selected here.

1:09:27
Understand lectures standalone is something new that Mark might be talking about here in a couple minutes, but the other thing I want to show is this one.

1:09:38
If I go into the discussion, it's defaulted to discussion.

1:09:43
But if I were to say create a new section, I get the option Do I want it to be lecture Lecture, standalone or do I want it to be a discussion?

1:09:54
So in my example earlier, if I needed to create a new lecture, I would create new lecture, then name this section number 002 or whatever it is, and then that would be created as a lecture.

1:10:07
If it was brought over with data, it's already predetermined, but new ones you can decide, is this going to be a lecture, Is this going to be discussion, Is this going to be a standalone discussion, which Mark will then talk about?

1:10:22
Thank you, Chris.

1:10:23
Yeah.

1:10:23
So in order to have the flexibility to schedule all courses the way we need to across all campuses, because PeopleSoft has some really quirky data validation rules around components, we created a new lecture standalone component that's going to be new for Spring 2024.

1:10:40
And all this means is that it's a lecture that doesn't have any linked discussions or laboratories.

1:10:45
It's just a standalone section.

1:10:47
If you have a like this anthropology example here, if you have a lecture with multiple discussions or labs, we'd continue to use the existing lecture component.

1:10:56
It'll function the exact same way as the lecture always has.

1:11:00
We just need to break it out in the situation where it's standalone so that everyone's able to schedule courses the way they need to.

1:11:12
All right, so next is final exam.

1:11:15
So this is going to indicate if you need a final exam.

1:11:19
So we'll separate the process for lectures with linked discussion labs.

1:11:25
Registrar's office will provide details a little bit later this summer, but departments, you'll be free to update this field, but more to come later.

1:11:36
So essentially here you're going to say whether or not you're going to have a final, so yes or no, and then so no, no final and then no final dear and finals week, or yes, final, dear and finals week or there's a common exam option.

1:11:53
So depending on what your particular section is and how you want them to be prepared to kind of schedule that out, but it sounds like more information on that coming this summer.

1:12:05
So depending on what the best information you have right now is to update that.

1:12:12
Any questions there?

1:12:14
Yes, you have a class that's active, just make it tentative for those things we did.

1:12:31
So there's two virtual and one in person questions about tentative versus schedule print and there is a lot of overlap in what the two do.

1:12:39
Schedule print is meant to hide classes from the schedule and in most situations that happens, students won't be able to find it.

1:12:47
It won't show up in a class search.

1:12:49
But we've discovered, however, is that some administrative users who have the ability to enroll students can still find those sections, and it isn't always clear those users that they shouldn't be enrolling students.

1:13:00
So we would recommend anybody who really, really needs to hide the section to use Tentative.

1:13:05
They can use schedule print too.

1:13:07
It won't break anything if you say no on that as well as make it tentative.

1:13:10
But if you want to make sure that nobody enrolls the class and it is probably the more secure way so you could make it tentative and not hold, that's correct.

1:13:29
So make sure for those.

1:13:30
Virtually the follow up was that they don't have to be used in conjunction.

1:13:35
You could have a tentative class that has schedule print yes, you could have an active class that says schedule print.

1:13:40
No, they're not depend on one another.

1:13:47
All right.

1:13:50
And that kind of rounds out this portion on the side here, auto enrollment we already talked about and that goes with the Link 2 on this side.

1:13:59
So scrolling down, we have a couple kind of new things that from my understanding are now going to be visible for you all as schedulers.

1:14:06
So the first one is the course attributes.

1:14:09
This is going to show you the course attributes and it's not editable.

1:14:13
But then we have the section attributes here and you can add section attributes and you'll do that by clicking on the little pencil here.

1:14:22
And then from a listing of the attributes you can click on this green plus button and from the drop down here you can then choose the attribute that you need to add to your section.

1:14:35
Go ahead Mark, I just wanted to add one thing about attributes.

1:14:39
If you don't know what a section attribute is, don't worry.

1:14:42
It's not something we use all that much at UConn, but we are actually going to start using it quite a bit and course leave.

1:14:47
It's going to be allow us to do a lot of cool things.

1:14:51
In particular, one of the things that will allow us to do is when we have scheduling units who share courses across multiple departments, that's the way we can flag sections that belong to particular departments so that we know that, you know, if say the, I don't know the NBA program is using an accounting course, it's not necessarily, they don't necessarily go to the accounting department because they can get, they have the permission to schedule those courses.

1:15:14
They'll be rules in place for using certain attributes and we'll provide information about when and how to use those.

1:15:23
Very good.

1:15:24
So I thought you could add those in there.

1:15:26
Just kind of another emphasis here.

1:15:28
You can add multiple.

1:15:29
So as many times as I click, click that green plus button and then going to get an additional drop down here, I'm going to add another one.

1:15:38
There's also a trash can.

1:15:39
The trash can is going to be a delete button.

1:15:41
We're going to delete it out and then once you hit the accept button, that's what's going to save that in there.

1:15:48
And then you can see it's in there as an attribute.

1:15:52
So that is section attributes.

1:15:57
Let's Scroll down.

1:15:58
We're going to skip over Instructor Room and schedule and come back to all of those.

1:16:03
On the bottom here there's internal comments.

1:16:06
Internal comments is going to be a field that you can use in conjunction with other rules to help detailed instructions.

1:16:14
For example, like that variable topics course that we talked about.

1:16:19
New topics do not require approval though.

1:16:22
We need to put in the Internal comments to kick off a particular workflow and then the registrar's office will be able to see that.

1:16:31
So any information like that within the rule, say put this information internal comments, that's where you'll put that in and then the information within there is what generates the rule so that the registrar's office will be able to see that.

1:16:47
So next we have the enrollment.

1:16:50
Oh, question, just one quick question.

1:16:53
I I'm wondering, I'm assuming that's the same in an independent study when we add the topic.

1:17:02
And if so, if so, is it limited to the 50 characters?

1:17:06
All right, so the question is whether we use a note for or to add a topic to an independent study.

1:17:13
The short answer is no, the the topics for independent studies aren't really scheduling because those are tied to individual student enrollment.

1:17:20
Those need to be added via transcript text.

1:17:23
We are working on a a more efficient workflow to allow independent studies to be added.

1:17:29
But for the time being, there's still that enrollment request form that student should fill out if they want independent study so that they have the right number of credits, they confirm that they have the consent they need and they have the correct project title on the transcript.

1:17:50
All right.

1:17:50
So next to enrollments, we have enrollment cap wait list and then room cap requested.

1:17:58
So for this, I'm actually going to go back to our example here for our lecture.

1:18:05
So we go into our lecture, we'll see that our room cap, our cap actually is 100 and then we also have a room cap request at 300.

1:18:15
So for the most part, these two are going to match your room or your cap is going to be the capacity of the room.

1:18:22
The room cap requested is going to be the size of the room being requested and then there's a wait list area where you can put how many you want on that wait list.

1:18:37
Another thing to note here, there's a current and then waiting.

1:18:41
So this is another nice feature of class is once you're in refine mode and students start registering for these courses, as you then go into class you'd then be able to see the current and the waiting list amount.

1:18:55
So we'll actually pull that information from PeopleSoft and then display it within class itself.

1:19:01
So that can help you make decisions on do I need to open up another section or or those types of things?

1:19:08
Do I not need a section?

1:19:11
Do I need to cancel section, move some students around, etcetera, But that information is displayed right there.

1:19:18
This also helps when determining your room.

1:19:22
So the click on the drop down here for the room, you'll notice that there is departmental rooms or you'll I'll note that these are departmental rooms that Anthropology has access to, so those are displayed here.

1:19:37
So we'd be able to choose one of those, or being that all of these, you'll notice the little parentheses there, that's how many students can actually fit within those rooms.

1:19:48
And our capacity for this lecture IS300.

1:19:52
So we're obviously not going to be able to use any of these rooms because they're awfully small.

1:19:57
So we'd have to go down here and say general room assignment or no room needed, basically getting a room somewhere else other than those departmental rooms if we have a capacity that's actually exceeds what the room capacity is.

1:20:16
There's a rule that pops up or should be popping up.

1:20:20
Oh, it's working now.

1:20:21
That's great.

1:20:22
So I'm going to choose the the room here for 20.

1:20:25
So this BCH 404 has the capacity of 20 people within it.

1:20:32
And if I try and save the section here, ah, I'm going to get a pop up that says air enrollment cap must be less than or equal to actual room maximum.

1:20:43
So it doesn't let you choose a room that's too small for the amount of people that you're trying to have within that section.

1:20:51
So in this case, our best option would be to go down the drop, drop down, choose probably the general room assignment and then those are going to be those are going to be assigned out during that room assignment phase using the EMS optimization software and then it's going to come back into here.

1:21:11
You'll notice that there is a room seek option right here.

1:21:16
Typically it's not going to be on the plan phase, correct.

1:21:20
But just for our purposes today, we do see that it's available.

1:21:24
Typically after that room assignment phase in the post registration phases, it's going to allow you to then use this.

1:21:35
So I can click on the EMS room seek and what it does is actually does it call out to EMS as a normal user and then checks to see what the room availability is.

1:21:48
So here we can see that there are particular rooms that are available that would fit that capacity.

1:21:55
There's also some available rooms that do not meet that requirement.

1:22:01
So here these are rooms that are available, but there's not enough space for that user or for the 300 individuals that we need.

1:22:10
So it shows their capacity and then their deficit.

1:22:14
And then if there are rooms that were already taken, they'd be shown here in the not available.

1:22:20
So these would be rooms that would be available that would fit that space that are already taken with this too.

1:22:29
There's certain things that you can add in for room features.

1:22:33
So if I click this little pencil next to Room Features, I can then click the plus button here and then choose the room feature or attribute that I want to include in that seek.

1:22:45
So for example, if we needed say let's say display instructor facing, I click accept and then do the room seek again, not only is it going to use that requirement for the capacity of the room, but then it's also going to look for rooms that also have that display instructor facing.

1:23:07
So I could choose either of these rooms by clicking the select button, otherwise there's available not met criteria.

1:23:15
If I select that, we have all those ones that didn't meet it based on the capacity, but then we also have three here or actually one more.

1:23:26
This SCHN 151 doesn't have the display instructor facing, but it does have the right capacity at 3:05.

1:23:38
So that allows you to look for multiple criteria, not the only the capacity of the room, but then any other features that you might need there.

1:23:47
So that's how that room seek would would work.

1:23:50
And then kind of the process for that again would be you go through the room assignment phase, everything would be optimized in the EMS and then it would be rereleased to you in the preregistration phase, I think it was called.

1:24:04
During that time, you'd be able to go into the EMS and then if you want to select a different room from there, you'd then be able to select it.

1:24:12
But typically during this plan phase, you won't be able to see the button.

1:24:16
But just for the training today, we wanted you to be able to see it so that we could talk through that.

1:24:22
Does that make sense?

1:24:23
I have a question for Mark.

1:24:29
So oh, call is apparently going to be renamed Herbst Hall.

1:24:34
Is that going to be loaded into I know I'm sure.

1:24:39
I was so excited to hear this.

1:24:42
Will that be represented in the Spring 24 Will still say, Oh yes.

1:24:46
So we actually just heard about this during one of our earlier sessions today.

1:24:50
The question is, oh, call it was just announced it's going to be renamed to Herbst Hall and will that be reflected in the system?

1:24:56
The answer is yes.

1:24:58
We just need to reach out to university planning to confirm like the effective date of the change and we've set things up so it can be changed very quickly.

1:25:06
So OK, thank you.

1:25:09
first Test of our new system, couple questions about the rooms.

1:25:16
We have a couple of classes that we get together with a few other departments to determine who's going to use.

1:25:26
It's a it's like a computer lab and all three oh eight's the number.

1:25:36
And so we the the department's joined together to determine like to grab our spot, you know stake our claim on a on a you know a time period.

1:25:47
So when we would those in, we would just, we don't have control of the room, but we were that stuff.

1:25:54
How are we going to do that now when it's not available?

1:25:59
All right.

1:25:59
So the question here is about the room that's shared.

1:26:03
That's not a shared central classroom, but shared by multiple departments.

1:26:08
How can you do that?

1:26:11
The academic department that actually controls it's going to have the they're going to be able to pull it from the the drop down, but we can have a workflow associated with that room in particular if we need to.

1:26:26
It's a central classroom.

1:26:36
So if you.

1:26:37
So if you have a situation like that where it's it's not a central classroom, it's not clearly owned by a particular department, you should reach out to our office and we'll figure out exactly the best way to handle that.

1:26:49
The other thing is our ASL classes.

1:26:53
So I always put a note that we need classrooms that have movable seats that they can go into a semicircle.

1:27:00
Yep, if you the question is about a particular room feature that's required for the ASLN classes.

1:27:07
With you in mind we added movable seats.

1:27:10
That's one of those features.

1:27:11
So now when we do the optimization will be in, you'll be ensured that they go into movable seats.

1:27:20
That was just for you there can, yeah, I can make a quick comment about the features.

1:27:37
That's probably seems sort of short to you.

1:27:40
We want to be sort of careful about how we use features because it might seem like if you say that something is required, it means you're more likely to get it.

1:27:49
In reality, because we're using the optimizer.

1:27:51
If they're sort of like competitive strains on shared resources, that might not necessarily be the case.

1:27:57
So we'll need to know for the SLN classes that they need movable seats.

1:28:01
But we didn't put things in here like, I don't know, tablet armchairs for example, because we know that's not typically a requirement.

1:28:10
That might be a preference.

1:28:11
So we what we're going to be working on here for this feature is during the plan phase, they'll be certain features that you can use as requirements.

1:28:20
So we know for optimization, but then once we've moved past the room assignment phase, because like how Chris showed you to, you can use them as sort of a filter and room seek.

1:28:29
We'll add additional features that can be used for that purpose, but not necessarily prior to that so that we don't have any bad results.

1:28:37
The optimizer because some preferences were loaded as requirements and then as a result people didn't get what they needed.

1:28:44
If you want to add in the movable seats, then we have no place to go for 300 students to move around the seats then I mean kind of tough, but yeah, good point there.

1:28:58
Any other questions in the scheduling and information that we're putting in?

1:29:04
Where would we indicate topics and or class notes that used to be realized?

1:29:15
Oh, I'm sorry, sorry.

1:29:17
You're getting emails, topics or class notes.

1:29:20
Where would those go?

1:29:26
The question is where the class notes go.

1:29:30
The notes section that I don't think you've gotten to yet.

1:29:33
That's where you'd be adding the class.

1:29:35
Oh, notes.

1:29:35
Right here.

1:29:36
Yeah.

1:29:37
Oh, right here.

1:29:37
OK, if it's a If it's a topic force the.

1:29:44
The Topic title field at the top of the section editor is where you would assign those the the notes.

1:29:52
Here the class notes are just for information about a course that you want students to see.

1:29:57
If it's a special topics course, those topics have to be added to the catalog before they're available.

1:30:03
And so if it's as long as available in the catalog, you should be able to select it from the drop down.

1:30:07
But I'm education and we have multiple sections of like our courses for our IBH students and we identify in the topics section when I've done scheduling like which section is for the English secondary versus the math secondary versus elementary.

1:30:25
And those have always just been part of like we identify which sections are going to have those different areas that would be in topics.

1:30:43
All right.

1:30:43
So that was room.

1:30:45
The other thing to talk about here is we're quickly running out of time is the instructor.

1:30:49
So this is where you'd put your instructor in.

1:30:51
Just like we saw with that other area, you can add a new instructor.

1:30:56
And if your department instructors should be available here in the drop down, these also are identified by clicking in the drop down.

1:31:05
You start searching, let's say we want Eric, I can find Eric, add Eric here and then choose the role.

1:31:11
Are they primary, secondary, etcetera, do they need add, are they approve or grade, etcetera.

1:31:18
You can also add and remove them here so you can add multiple instructors.

1:31:23
So that's how you would do that.

1:31:24
So the instructor, the room, those all add together to then kind of optimize here within the schedule.

1:31:32
So right now, the previous scheduled time for this section was Monday, Wednesdays 230 to 3:20.

1:31:40
So we click on that, we'll be able to identify that there is a conflict with this section.

1:31:47
So we know there's a conflict with the instructor.

1:31:50
The instructor I neglected to point that out for Kevin actually has this little blue star next to their name, so that indicates who do you want to see.

1:32:01
The instructor conflicts here within the scheduler, so Kevin actually has another section that is scheduled for that same time period that overlaps with this section.

1:32:14
So let's say we want to find a new time for this this section to meet.

1:32:19
We'd be able to identify it.

1:32:21
Click and then add it in.

1:32:23
So now this section's going to be meeting Monday, Wednesday, Fridays from 8:00 AM to 8:50.

1:32:29
If I click accept, it's then going to add that in.

1:32:34
So you're probably wondering how does it determine what if I didn't want it on Monday, Wednesday, Fridays?

1:32:39
What are my other options?

1:32:40
Those are probably the things going through your head right now.

1:32:43
So the options that you can select on that calendar are all determined by these meeting patterns that you select on the top here.

1:32:50
These meeting patterns are predetermined to kind of optimize your room spaces and make sure that you're using those time blocks in the most effective way possible so you can get as many sections in together.

1:33:02
And that's the whole premise of using those standard meeting patterns so you can select other ones here that have similar patterns.

1:33:10
The one we had selected was for 50 minutes this meeting three times a week on Monday, Wednesday, Friday.

1:33:17
There's also meeting pattern here that meets 75 minutes a week.

1:33:21
That's for Tuesday, Thursday.

1:33:23
So if I want this section to meet, then I can choose that meeting pattern from the drop down or use this little thing over to the left here.

1:33:30
It's a little grid, then shows me all the meeting pattern times that it could meet at.

1:33:35
If I find one that I want to make it be, I can click into it and then add it in there.

1:33:41
So these meeting patterns will be specific to the amount of credits or set up to for most of your scheduling units.

1:33:50
We'll be able to see specific meeting patterns.

1:33:54
There's also the ability to choose your own meeting pattern if that's what you need to do.

1:33:59
There's a user defined right here, and how that works is using the meeting name here I can make up when I want this meeting pattern to be.

1:34:07
So let's say we wanted it on Monday.

1:34:10
I can type in M for Monday, and I also want it to be on Thursdays.

1:34:15
So I'm going to type M for Monday, capital T, lowercase H for Thursday, and I want it to meet from 1:00 to 2:00 PM.

1:34:27
So I'm going to put in 1-2 and put P or PM in just like that.

1:34:32
Click Add and then it's going to add my lecture in.

1:34:38
So there I made a rookie mistake and didn't specify with the one being that it was in the afternoon.

1:34:44
Needs to have a P or a PM there.

1:34:47
Being that I didn't, it thinks it should be 1:00 AM to 2:00 PM.

1:34:50
That's a pretty long section or section session, so if I come in here I can update that.

1:34:57
I'm going to say Monday, M for Monday, W for Wednesday and let's say just for fun it's going to be Thursday and I wanted to meet at 1P to 12:50 PM.

1:35:11
So if it's not at the hour, you can use the colon and then the minutes and then click add and that's going to add that in correctly.

1:35:21
So we can see on the bottom now it's Monday, Wednesday and Thursday meeting at 1:00 PM to 2:50.

1:35:27
You can also use 24 hour or military time.

1:35:32
I know a lot of nursing programs prefer that usually.

1:35:36
So we could say Monday, Wednesday through Yo, Monday, Wednesday, I'm going to say just 1400 to 1550 or whatever the case may be, click add and then it's going to translate that to 2P to 3:50 PM.

1:35:56
So P or PM works for afternoon.

1:35:58
If you don't specify P, it's going to know that it's AM or think that it's AM.

1:36:04
So if I just put 8 to 950, it's going to think that that's 8:00 to 9:50 AM.

1:36:11
So that's how that aspect of it works.

1:36:14
You'll also notice that by default it has all the discussions that meet on my scheduler here.

1:36:21
I can remove them by clicking on these little boxes, it hides them and if I want to add them back in, I click them again and it adds them back.

1:36:29
You can also add in other courses in here.

1:36:33
So if there's a course that you want to see overlaid with their schedule with this one I can click that button and let's say I click Type in Biology 1107, I can go ahead and click the add button here.

1:36:47
And now we see all the lectures and discussions for Biology 1107.

1:36:53
So you can actually put in as many as you want to or need there.

1:36:57
So I could even put in math 1131 Q click by add button and that will add in all math as well.

1:37:07
Just like with the discussions, if it becomes overwhelming and we don't want to see them, you can click on them and remove them.

1:37:14
You can click them back again and it puts them back on that schedule.

1:37:19
So that allows you to kind of manipulate it to see other items that are scheduled and then kind of make those decisions about when to schedule something, etcetera.

1:37:29
Once we're done, we'd hit the accept button and then that would add it in and that will change our meeting pattern there Very first example, oh, I can go out out completely and then back in.

1:37:48
The instructor overlap.

1:37:51
Oh, the instructor overlap.

1:37:52
Yeah.

1:37:53
So if I go into here and to show that I like to just add someone else and then give the little star to that person like David here and click accept.

1:38:05
Now if we go back in here, you'll notice that there's no red boxes there.

1:38:10
That's because that Red Star moved from our previous instructor to David.

1:38:15
So now it's just showing us the conflicts from that other instructor, David, which doesn't have any.

1:38:22
But if I go back in there and I change it back to Kevin, make bride accept, and then go back in, you'll see that there's those red slashes on the side.

1:38:36
Those red slashes here.

1:38:38
These indicate instructor conflicts.

1:38:41
What was the conflict?

1:38:42
I I remember seeing something above where there was the conflict.

1:38:52
There's extra time to be.

1:38:57
Yep.

1:38:57
So that's a good question.

1:38:58
So right here it doesn't tell you specifically what course that is.

1:39:02
But the way that I would suggest to do this is to go out of here and this is for Kevin McBride.

1:39:10
So we want to see what Kevin all has on their schedule.

1:39:14
We come up here to the view by where you can go to instructor and then we can find Kevin's name here, Kevin McBride on there multiple times for some reason.

1:39:29
And this is going to give us their entire schedule.

1:39:31
So then we can see what they have scheduled and when and then that should indicate what it is.

1:39:38
Yeah, that there wasn't, but thinking maybe they were requiring their time between.

1:39:49
Oh yeah, understandable.

1:39:53
Yeah, that view in that calendar mode that we see mode or you can just look at it that way.

1:39:58
So like, can you put that into like the Monday, Wednesday, Thursday, Friday pattern?

1:40:04
Not specifically here.

1:40:06
There is a way to do it.

1:40:07
And how you would do that is actually filter down for just that instructor.

1:40:11
So that's one of the other tools up here.

1:40:13
And we can go over that during the workshop because as you can see here, there's many, many things that you can do within here.

1:40:20
Basically, if you know the data point, you know what you're looking for, we can look for it.

1:40:24
And then after we would do narrow that down to just that instructor, you can actually click this visualize button and that's going to give an overlay of all those courses over together.

1:40:34
So it's sort of like that snapper view, but a little bit different.

1:40:39
But then you can double click on it and it'll show you the individual courses for that particular instructor that are meeting.

1:40:46
So there is a way to do it in just a little bit of manipulation.

1:40:50
You'd probably have to filter just by that person's name, or probably ID would probably be the easiest.

1:40:58
And then if you want to come to the workshop, we can work through that.

1:41:01
And then you'd come up here and click Visualize, and then you'd be able to see that instructor's entire schedule just on their own there.

1:41:10
Actually, you know what we could do?

1:41:13
Put it in as instructor.

1:41:14
Now there's this little report thing that we can click.

1:41:19
We click on that.

1:41:20
That's going to just take us into just what Kevin has as what they're instructing.

1:41:26
And then we can click this visualize tool and then it'll show us the overlap.

1:41:31
So here we can see there's two items, there's their lecture and then there's the other item that they have.

1:41:39
I'm not going to try and pronounce that word.

1:41:41
It's way too late in the day, but you can see what it is there.

1:41:45
But that that would be the how you can do it actually without a filter.

1:41:48
So yeah, go ahead, just just one note to add here, but that's specific to this, is that because the instructors of lectures are often also added as secondary instructors on discussions, Those Friday conflicts, there are probably not direct conflicts for Kevin.

1:42:07
So those will probably just sections that are related to his lecture, but they're being taught by grant assistants.

1:42:18
Good point there, but that's how you can do that.

1:42:30
Yeah, we are a little over that time, but I'm going to try and wrap this up with the rest of the tools.

1:42:35
We have touched on them kind of with these questions.

1:42:38
So these are great questions to bring up.

1:42:40
So we talked about the view by.

1:42:42
The View by is going to allow you to change what the view is.

1:42:45
So basically it's taking the data and then showing it to you in a different way.

1:42:49
So I mentioned earlier that this is basically a data input but then also reporting tool that you can, if you know what you're looking for, you can report on or manipulate that data.

1:42:59
So the view by is one way to do that.

1:43:01
Room is another extension of that.

1:43:03
Once those rooms are added in using the general assignment in the EMS optimizer, then you can see where all your rooms are for your department, etcetera.

1:43:14
The validate button, that's where you would select that.

1:43:17
And the validate button is actually going to be your turn it in button.

1:43:22
So here I'm on our Lily pad university, just our testing site.

1:43:27
If I need to turn in my schedule, I'd click that validate button and it's going to run my rules and then show me if there are any rules that are those errors.

1:43:40
And if there aren't, I can go ahead and click the Start Workflow button.

1:43:44
When you turn yours in, you're going to get at least one Workflow is going to be the workflow of moving from design to refine mode, where your chairs and Deans will review it before it gets submitted.

1:43:55
So that's what you'll see there.

1:43:57
So this is just indicating you can go ahead and start workflow and then that would submit this scheduling unit to workflow.

1:44:05
If it's already in workflow and you come to the scheduling unit, you'll be able to then click on this button that says workflow status is going to show you where within that workflow or that approval path it is currently.

1:44:18
This one's at the are it's approved at the A/C chair currently waiting for our registrar office at Lilly Pad University.

1:44:26
Once they approve it, then it's going to go into our banner for you, it's going to go into PeopleSoft.

1:44:32
They're just two examples of SIS's.

1:44:35
So there's that kind of visibility for you as the OR the scheduler.

1:44:39
Once you submit it to Workflow, you can still see where it's at within Workflow.

1:44:44
And then once this is full through Workflow, you'll then see it will change into refine mode and then that will be your indication that all that information you put in is now in PeopleSoft.

1:44:54
And then we have that back and forth communication with PeopleSoft.

1:44:58
So that's what that does.

1:45:01
Some other tools to be aware of.

1:45:04
There's the visualized tool that we talked about, the filter tool, which we can deep dive into during the workshops, but there's a lot of information that you can actually report on.

1:45:14
Each one of these fields actually expands out, So if you know the information that you want to filter down for, we can essentially make you a report with a unique URL.

1:45:24
You can retain that, we'll figure out how to look that information up and then you can save it and use it from term to term.

1:45:32
So feel free to come to the workshops for that.

1:45:35
The last tool is a framer tool, just real click on this.

1:45:40
This allows you to see information side by side by side, so it's great for comparing terms.

1:45:46
So I'm going to go up to my view here.

1:45:48
I have all my courses listed out here.

1:45:51
All the terms within the system are all on the top.

1:45:54
I'm going to go to detail here and just see my detailed information of that terms.

1:46:00
So I can see the section number, who the instructor is, day and time.

1:46:05
And then I want to customize it because I actually only want to see certain terms.

1:46:09
So I want to see Spring 24, Spring 23, Spring 22 and then I'm going to click 3 columns here and I'm actually just going to see that information for anthropology from those 3 spring terms right in a row.

1:46:23
So you can identify maybe do you need to add additional sections, do you need to remove them etcetera, you can identify trends and things.

1:46:33
And then within here any of this historical information, let's say we had a section 01/16 D that we want to broad bring over with this little arrow button.

1:46:45
If I click on that, I can just choose my term that I want, click accept and it's going to copy that information over and then bring it forward into spring 2024.

1:46:57
So up in the corner here I see Spring 2024 and it's the scheduling unit for anthropology.

1:47:03
So here I'd just be able to save it down on the bottom here and then it would save that section into my current Spring term.

1:47:11
So that's how you can look at previous data, copy it and bring it forward.

1:47:17
You'd also be able to update it and update it to how you need it for this term, so that's a handy little tool there too.

1:47:25
Other things here.

1:47:28
And the last thing is the export button.

1:47:31
Anything that you do in that view by or the filter, you can also export either to excel or to PDF.

1:47:40
And then there's also these little help buttons everywhere.

1:47:43
These are help buttons actually to our help site at Coarse Leaf.

1:47:47
So they give you kind of the step by step of this is how you do this within this interface.

1:47:52
So here I clicked on the help button for scheduling unit.

1:47:56
So it talks about how do you expand all, how do all those tools that I just talked about work.

1:48:02
So it goes through and gives you the step by step and further information.

1:48:05
So as a user that's able to log in, you're able to go and look at that help information.

1:48:11
You'll also have documentation from your admin team too that they'll send out.

1:48:17
So this is just another resource that if you forget how to do something, you can check there.

1:48:23
Otherwise, check your UConn documentation too.

1:48:28
That's the last thing I have.

1:48:34
All right.

1:48:36
Thank you.

1:48:37
Thank you.