

PeopleSoft Scheduling Classes Tutorials

1. Summary of the Scheduling Process.....	3
2. Print an MS Review or a Class Enrollment Report	7
3. Add New Instructors to the Instructor/Advisor Table.....	12
4. Update Instructors in the Schedule of Classes.....	15
5. Update Room/Days/Time in PeopleSoft Scheduling Classes	19
6. Increase/Decrease the Enrollment Capacity.....	22
7. Reserve Capacity	25
8. Change Class Status to Inactive.....	29
9. Add More Course Sections.....	32
10. Manage Auto-Enroll Sections, Enrollment, and Waitlist Capacity	49
11. Add a Course That Was Not Rolled to the New Term.....	51
12. Pre-Requisite Screening	67
13. Copy Research Department Class Instructors	68
14. Manage Auto-Enroll Sections, Enrollment and Waitlist Capacity	75
15. Department Class Validation Report	77
16. Dept Class Validation Report Error Messages	83
ERROR MESSAGE: CL 01 - MISSING CLASS ASSOCIATION	85
CL11 – INVALID AUTO ENROLL SECTION	86
CL12 – MISSING SECTION COMBINED	87
CL13 – INVALID CLASS SECTION NAME	87
CL15 – MISSING COURSE TOPIC	88
CL16 – NON ENROLL SECTION NOT REFERRED	89
CL17 – INVALID CLASS START/END TIMES	90
CL19 – MISSING MEETING PATTERN	91
CL20 – INVALID MEETING PATTERN	92
CL21 – INVALID INSTRUCTOR	93
CL23 – NON ENROLL NOT REFERRED (ANY)	94
CL24 – CLASS ACTIVE – ENROLCAP ZERO	96
CL26 – CLASS – COURSE NOT ACTIVE	97
CL28 – CLASS INSTR GRADE RSTR ACCESS	98
CL29 – CLASS INSTR INVALID ROLE	100
CL35 – GRADE RSTR ACCESS APPR NOT = 1	101
CL36 – GRADE RSTR INCORRECT TA ACCESS	102
CL37 – GRADE RSTR ACCESS PI: REC LAB	103
CL38 – GRADE RSTR ACCESS TA: TUT CLIN	104
CL39 – GRADE RSTR SUP ADMIN PRINT CHK	105
CL40 – GRADE RSTR ACCESS INSTR BLANK	106
CL41 – COMBINED CLASS INACTIVE STATUS	106

17. Print Course Schedule Sheets.....	108
18. Print Meeting Vector Counts	111
19. Give Permission to Register.....	121
20. Print a Class/Grade Roster	123
21. How to Finalize Class Schedule Data.....	128

1. Summary of the Scheduling Process

To reduce data entry for Dept Class Schedulers, active classes are “rolled over” each Term from the previous year in PeopleSoft (Spring from the previous year rolls over into Spring of the next year, and Fall of the previous year into Fall of the next year, etc.).

Department Class Schedulers are notified when they can begin making changes to the schedule for the new Term. Generally, the database remains open for changes for about 2-4 weeks.

	The Steps	Navigation in PS Admin
1	A course must be in the Course Catalog before you can schedule it. Much of the information that displays on the scheduling pages defaults from here. Information includes: Description, Course units, Grading, Consent required, DEC Category, Offerings, Components, etc.	Main Menu > Curriculum Management > Course Catalog > Course Catalog
2	The first step in the scheduling process is to print an MS Review (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.	Main Menu > SBU > SBU Student Records > Curriculum Management > Scheduling Reports
3	If you have any new instructors that will be teaching classes for your department you must make sure that they are “Active” in the Instructor Advisor Table and that your department is listed on the Approved Courses page. If your department is not listed you can add it.	Main Menu > Curriculum Management > Instructor Advisor Information > Instructor/Advisor Table
4	Using the MS Review report as a guide, update the Schedule of Classes to reflect any changes for the new Term: <ul style="list-style-type: none"> • Add/delete instructors • Change the room • Change the days/time • Add more sections • Change the Enrollment Cap • Inactivate sections that will not be offered in the new Term 	Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

	The Steps	Navigation in PS Admin
	<p>If you have sections of a course that are not being offered this Term change the Status to “Inactive”. Do not delete them! This is done on the Enrollment Control page in Maintain Schedule of Classes.</p> <p>Remember to change the Enrollment Cap to “0” and delete all of the instructor rows. If it’s a combined course make sure you notify the co-offering department.</p>	
	<p>If your classes require Department or Instructor Consent make sure that they are setup appropriately. This information can be found on the Enrollment Control page in Maintain Schedule of Classes.</p>	
5	<p>Cross-listed Courses - New course combinations must be approved by the Dean’s office first. Then they are linked by the Registrar’s Office. You can view the list in the Combined Sections Table.</p> <p>You cannot update the instructor, room and meeting days/times in Maintain Schedule of Classes for combined sections. You must go to the Schedule Class Meetings page to update this information. Remember to coordinate all updates with the co-offering department!</p> <p>You cannot change the Enrollment Capacity for combined sections in Maintain Schedule of Classes. You must go to the Update Sections of a Class page to do this.</p>	<p>Main Menu > Curriculum Management > Combined Sections > Combined Sections Table</p> <p>Main Menu > Curriculum Management > Schedule of Classes > Schedule Class Meetings</p> <p>Main Menu > Curriculum Management > Schedule of Classes > Update Sections of a Class</p>
6	<p>For multi-component courses or courses with many sections, it’s easier to set auto enroll/associated class information, enrollment caps and totals, waitlist caps and totals when you can see all of the sections listed together on the Update Sections of a Class page.</p>	<p>Main Menu > Curriculum Management > Schedule of Classes > Update Sections of a Class</p>

7	If a course was not offered in the Term that was “rolled over,” then you will have to add it as a “new course” for this Term. Go to the Schedule New Course component to do this.	Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course
8	If you want to enforce pre-requisite screening for a class, you must make sure that this option is selected in the Adjust Class Associations page.	Main Menu > Curriculum Management > Schedule of Classes > Adjust Class Associations
9	If you have many sections of tutorial courses, use the SU Copy Dept Class Instr process to copy the instructor information from the “master class” to all sections of the tutorial courses. This will save a lot of time.	Main Menu > SBU > SBU Student Records > Report > SU Copy Dept Class Instr
10	When you are finished scheduling for the new Term, print the Dept Class Validation Report to see if there are any errors. Correct your errors in Maintain Schedule of Classes, and then print the Dept Class Validation Report again until you see no errors. Call the Scheduling staff in the Registrar’s Office if you need assistance.	Main Menu > SBU > SBU Student Records > Report > SU Dept Class Validation
11	Print the class schedule in a grid format . It’s easy to view this way.	Main Menu > SBU > SBU Student Records > Report > SU Crse Schedule Sheets
12	Print the class schedule in a publication format so that you can post it on your website and print it as a <i>pdf</i> file.	Main Menu > SBU > Curriculum Management > Report > Scheduling Reports (select Printed Class Schedule as the Report Type)
13	Print meeting vector counts to see how your class schedule days/times are distributed.	Main Menu > SBU > SBU Student Records > Report > SU Meeting Vector Counts
14	View your Instructor Schedules .	Main Menu > Curriculum Management > Instructor/Advisor Information > Instructor Schedule
15	To monitor enrollment statistics for all classes in your department print an Enrollment Report throughout the enrollment period.	Main Menu > SBU > SBU Student Records > Curriculum Management > Scheduling Reports (select Enrollment Report as the Report Type)

16	Give students permission to register for classes where consent is required or to override a class that is closed or pre-reqs that are not met.	Main Menu > Records and Enrollment > Term Processing > Class Permissions > Class Permission
17	Print Class Rosters and, once grades are submitted, print Grade Rosters.	Main Menu > SBU > SBU Student Records > Curriculum Management > Class Rosters
18	After the “enrollment snapshot,” the class schedule in PeopleSoft will be opened for final editing. Run a Class Schedule Audit Report in SBU Reporting to see if instructor or class meeting information is missing. If it is, add the information in Maintain Schedule of Classes. It is required for instructional workload analysis.	Email Janelle Clarke in the Registrar’s Office to request access to SBU Reporting .
19	View the Unmet Demand Analysis reports to determine whether additional sections of a course are needed or enrollment caps should be increased next year.	Main Menu > SBU > SBU Unmet Demand > Inquire > <ul style="list-style-type: none"> ➤ Unmet Demand Analysis ➤ Unmet Demand Comb Sec Analysis ➤ Unmet Demand Section Analysis ➤ Unmet Demand by Subject

2. Print an MS Review or a Class Enrollment Report

The **Master Schedule Review (MS Review)** is the Excel report that you use to review all of the classes that you have scheduled for the specified term.

The **Class Enrollment Report** (Excel or pdf) gives you the enrollment statistics for your classes in the specified term.

Navigation:

SBU > SBU Student Records > Curriculum Management > Scheduling Reports

Find an Existing Value | Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search | [Advanced Search](#)

Search Results

View All | First | 1 of 1 | Last

Run Control ID	Language Code
psreports	English

If you already have a Run Control ID, click **Search** and then choose the Run Control ID from the list (as shown in this example).

Find an Existing Value | **Add a New Value**

Run Control ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

If you do not have a Run Control ID, click the **Add a New Value** tab and add the new Run Control ID (we suggest that you call it **MSREVIEW** for your msreview reports and **PSREPORTS** for other reports).

This will bring you to the **Scheduling Reports** page:

Scheduling Reports | Report Options

Run Control ID: psreports [Report Manager](#) [Process Monitor](#) **Run**

Available Report Types

Master Schedule Review Enrollment (PDF)
 Printed Class Schedule Enrollment (CSV)

Selection Criteria

Academic Institution: USBNY SUNY at Stony Brook
*Term: 1098 Fall 2009
Academic Organization Node:
Subject Area: WRT Writing
Session:
*Schedule Print: Yes
*Print Instructor in Schedule: Yes
Academic Career:
Campus:
Location Code:

Class Status

Active Cancelled
 Inactive Tentative


[Class Component Selection](#)

Save **Return to Search**

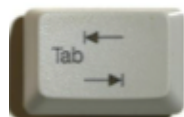
Enter the parameters for your report:

1. Select the Report Type from **Available Report Types** – The Master Schedule Review report is generated in .csv format (Excel). The Enrollment report can be generated in either .csv format (for Excel) or .pdf format (Adobe Acrobat).

From **Selection Criteria**:

2. Enter the **Term**.
3. Select one of the following:
 - **Academic Organization Node** - click the Lookup button  and select the department. This report will give you **all** classes in your **department**.
 - **Subject Area** - enter the 3-character Subject Area Code if you want to see only the classes in a particular Subject Area.

IMPORTANT! If you have a value in the Academic Organization Node field the Subject Area field will gray out and vice versa. This is because only one of these fields is allowed at a time in this search. If you want to make the grayed out field active, you must delete the value in the other field and then press TAB



4. Select the **Academic Career**; otherwise, leave this field blank and your report will include classes for all Academic Careers.
5. If you want the report to include classes for a specific Campus (or Distance Learning), select the **Campus** and **Location Code**. Otherwise, leave this field blank.
6. If you want only specific components, click the **Class Component Selection** link, enter each class component, and then click OK. Otherwise, your report includes all components.
7. Select the **Class Status** for the classes that you want to include in your report (Active, Inactive, Cancelled, Tentative).
8. Go to the **Report Options** tab and select the fields that you would like included in your report. For your Final MS Review (after scheduling), we recommend including the following fields (checked in the image below):

The screenshot shows the 'Scheduling Reports' interface. The 'Report Options' tab is selected and highlighted with a red box. Below the tab, the 'Run Control ID' is 'MSREVIEW'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button highlighted with a red box. The 'Report Options' section contains a list of 20 items, each with a checkbox. The following items are checked: Print Course Title, Print Requirement Designation, Print Session Code, Print Campus, Print Location, Print Auto Enroll 1, Print Auto Enroll 2, Print Associated Class, Print Requisites, Print Class Status, Print Reserve Capacity Data, Print Waitlist Capacities, Print Instructor, Print Enrollment Data, Print Facility Information, and Print Consent.

Report Options	
<input type="checkbox"/> Print Class Nbr	<input checked="" type="checkbox"/> Print Reserve Capacity Data
<input checked="" type="checkbox"/> Print Course Title	<input type="checkbox"/> Print Sections Combined Info
<input type="checkbox"/> Print Course Description	<input checked="" type="checkbox"/> Print Waitlist Capacities
<input checked="" type="checkbox"/> Print Requirement Designation	<input checked="" type="checkbox"/> Print Instructor
<input type="checkbox"/> Print Units	<input type="checkbox"/> Print Complete Instr Info
<input checked="" type="checkbox"/> Print Session Code	<input checked="" type="checkbox"/> Print Enrollment Data
<input checked="" type="checkbox"/> Print Campus	<input type="checkbox"/> Print Requested Room Capacity
<input checked="" type="checkbox"/> Print Location	<input checked="" type="checkbox"/> Print Facility Information
<input checked="" type="checkbox"/> Print Auto Enroll 1	<input type="checkbox"/> Print Academic Group
<input checked="" type="checkbox"/> Print Auto Enroll 2	<input checked="" type="checkbox"/> Print Consent
<input checked="" type="checkbox"/> Print Associated Class	<input type="checkbox"/> Print Course Attributes
<input type="checkbox"/> Print Class Notes	<input type="checkbox"/> Print Ownership
<input checked="" type="checkbox"/> Print Requisites	
<input checked="" type="checkbox"/> Print Class Status	

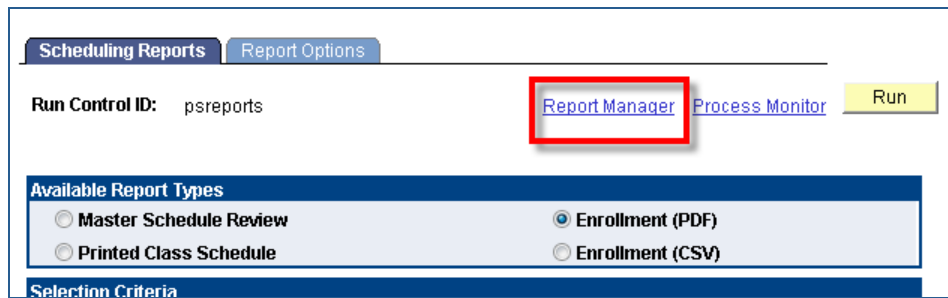
In particular, check

- Location (especially for courses not on main campus)
- Associated Class (should be same as section # or 9999 for auto enroll sections)
- Requisites (verify accuracy and if enforced as required)
- Reserve Capacity Data (check reserves and capacities)
- Facility Information (review room and be sure enroll cap doesn't exceed room cap)
- Consent (check accuracy of consent to enroll: dept, instructor, or no consent)

9. Click the **Run** button. Your request is sent to be processed on the server.

To retrieve your report:

1. Click **Report Manager** to go to the Reports



Scheduling Reports Report Options

Run Control ID: psreports

[Report Manager](#) [Process Monitor](#) [Run](#)

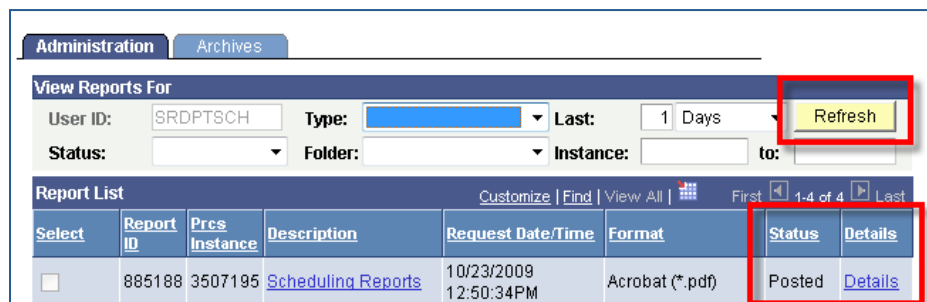
Available Report Types

Master Schedule Review Enrollment (PDF)

Printed Class Schedule Enrollment (CSV)

Selection Criteria

2. Your report will only be listed in the **Report List** once the process has run successfully on the server.
3. Click Refresh repeatedly until the Status column changes to Posted.
4. You can open the report when the Status column says Posted. To do so, click on Details



Administration Archives

View Reports For

User ID: SRDPTSCH Type: Last: 1 Days [Refresh](#)

Status: Folder: Instance: to:

Report List

Select	Report ID	Proc Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	885188	3507195	Scheduling Reports	10/23/2009 12:50:34PM	Acrobat (*.pdf)	Posted	Details



Report Detail

Report

Report ID: 885184 Process Instance: 3507191

Name: SU_SR012 Process Type: SQR Report

Run Status: Success

Scheduling Reports

Distribution Details

Distribution Node: psnsrepos2 Expiration Date: 11/2

File List

Name	File Size (bytes)	Da
CLSSCHED.CSV	18,825	10
SQR_SU_SR012_3507191.log	1,768	10
su_sr012_3507191.out	24,341	10

Distribute To

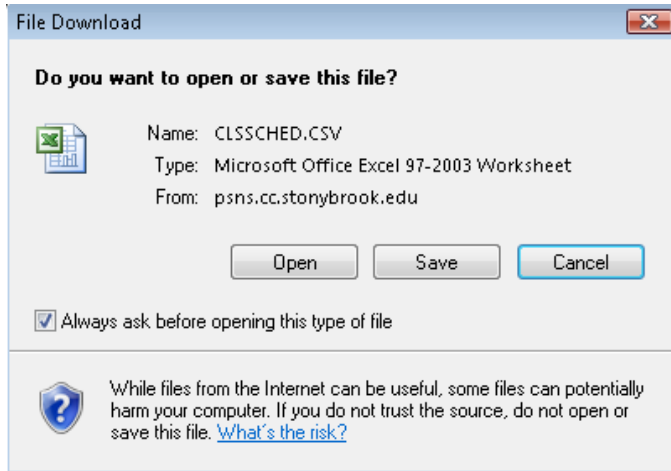
Distribution ID	Type	*Distribution ID
User		SRDPTSCH

OK Cancel

Click the **.csv** file or the **.pdf** file to open the report.

Note: If you don't see a **.csv** or **.pdf** file, then the report did not produce any output. Go back and check the parameters entered on the *Scheduling Reports* page to make sure they are correct; then run your report again.

If the report is in **.csv** format, it can be saved and opened in Excel.

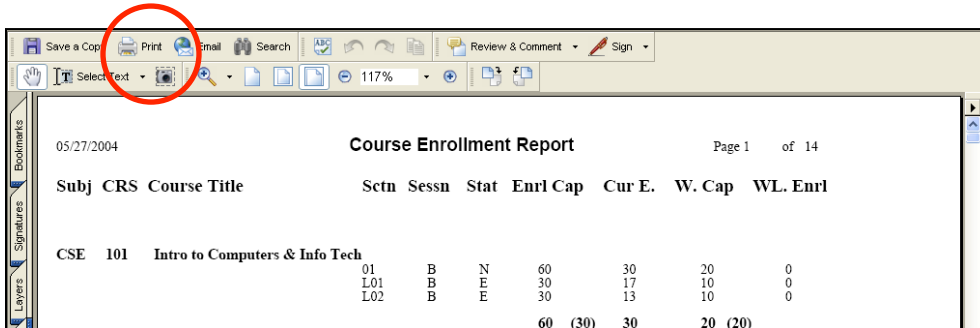


At this dialog box click **Save**.

After saving, cancel out of the **Report Detail** window.

Click **Go back to Scheduling Reports** to return to that page.

If the report is in **.pdf** format, it will open in Adobe Acrobat.



Click the **Print** button to print the report.

Click the **Close** button (X) in the upper right corner of the Adobe window to close it.

Cancel out of the **Report Detail** window.

Click **Go back to Scheduling Reports** to return to that page.

3. Add New Instructors to the Instructor/Advisor Table

In order to assign people as instructors for your classes, they must be in the Instructor/Advisor Table, they must have an **Active** status, the **Effective Date** must be before the start of the Term that you are assigning them to, and your department must be in their list of **Acad Orgs** on the **Approved Courses** page.

New faculty are initially setup by Human Resources with the hiring department as the Approved Courses Acad Org.

Navigation:

Main Menu > Curriculum Management > Instructor Advisor Information > Instructor/Advisor Table

The screenshot shows a search interface titled "Instructor/Advisor Table". Below the title is a prompt: "Enter any information you have and click Search. Leave fields blank for a". A tab labeled "Find an Existing Value" is active. The form contains five input fields, each with a "begins with" dropdown menu: "ID:" (containing "100200300"), "Campus ID:", "National ID:", "Last Name:", and "First Name:". Below these fields are two checkboxes: "Include History" and "Correct History". At the bottom, there are two buttons: "Search" and "Clear", followed by two links: "Basic Search" and "Save Search Criteria".

Enter the person's **Stony Brook ID** and click **Search**.

If you do not know the Stony Brook ID, enter the **Last Name** and **First Name** and click **Search**. Note: Some people may have the same first and last names. The most accurate way to search is with Stony Brook ID.

On this page you are viewing the most current Effective Dated row. Make sure the **Status** says “**Active**” and the **Instructor Available** says “**Available**.” You do not have to change anything on this page yet.

The screenshot displays a web interface for managing instructor and advisor information. At the top, there are tabs for "Instructor/Advisor Table" and "Approved Courses". Below the tabs, the name "Shannon Stigman" and a star icon are visible. The main content area is divided into two sections: "Instructor Details" and "Instructor/Advisor Role".

Instructor Details:

- *Effective Date: 08/23/2007
- *Status: Active
- *Instructor Type: (empty dropdown)
- *Academic Institution: USBNY (SUNY at Stony Brook)
- *Primary Acad Org: POLISCI (Political Science)
- *Instructor Available: Available

Instructor/Advisor Role:

- Advisor Number: 1
- Percent of Appointment: (empty input)
- *Academic Career: (empty dropdown)
- Academic Program: (empty dropdown)
- Academic Plan: (empty dropdown)
- Academic Sub-Plan: (empty dropdown)

At the bottom of the interface, there are several buttons: Save, Return to Search, Previous in List, Next in List, Update/Display, and Include History.

The **Primary Acad Org** is the department that was assigned when the person was hired.

Over time an Instructor’s status and availability may change. Click the **Include History** button and then click **View All** if you would like to view all of the history rows.

Click the **Approved Courses** tab to view the list of departments (identified by **Acad Org**) that this person is approved to teach courses for.


The screenshot shows the 'Approved Courses' tab for instructor Shannon Stigman. The instructor details are as follows:

Effective Date:	08/23/2007	Status:	Active
Instructor Type:			<input type="checkbox"/> Advisor
Academic Institution:	USBNY		SUNY at Stony Brook
Primary Acad Org:	POLISCI		Political Science

Below the details is a table with the following columns: Seq Nbr, *Acad Org, Subject Area, Course ID, Offer Nbr, Catalog Nbr, and Campus. The first row shows Seq Nbr 1 and *Acad Org POLISCI. A red box highlights the '+' button in the bottom right corner of the table, indicating where to click to add a new row.

At the bottom of the page are several buttons: Save, Return to Search, Previous in List, Next in List, Update/Display, and Include History.

If your department is not listed, you must add it by doing the following:

- Go back to the first page—the Instructor/Advisor Table—click in the **Effective Date** field, and click the **+** **Add a New Row** button. Make sure the Effective Date in the added row is before the start of the Term.
- Then click the **Approved Courses** tab
- Click the **+** **Add a new Row** button on this page
- Click the  to select your **Acad Org**
- Click the **Save** button

4. Update Instructors in the Schedule of Classes

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

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

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Maintain Schedule of Classes
Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Academic Institution: = [v] USBNY [Q]
Term: = [v] 1084 [Q]
Subject Area: = [v] EGL [Q]
Catalog Nbr: begins with [v] 191 [Q]
Academic Career: = [v] [Q]
Campus: begins with [v] [Q]
Description: begins with [v] [Q]
Course ID: begins with [v] [Q]
Course Offering Nbr: = [v] [Q]

Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)

Enter the **Term**

Enter the **Subject Area**



Enter the **Catalog Nbr**

Click **Search**

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

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Update Instructors

Navigation to the section you want to update by clicking the  and  buttons.



Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | LMS Data

Course ID: 201035 Course Offering Nbr: 1
Academic Institution: SUNY at Stony Brook
Term: Fall 2008 Undergrad
Subject Area: EGL English
Catalog Nbr: 191 Introduction to Poetry

Auto Create Component

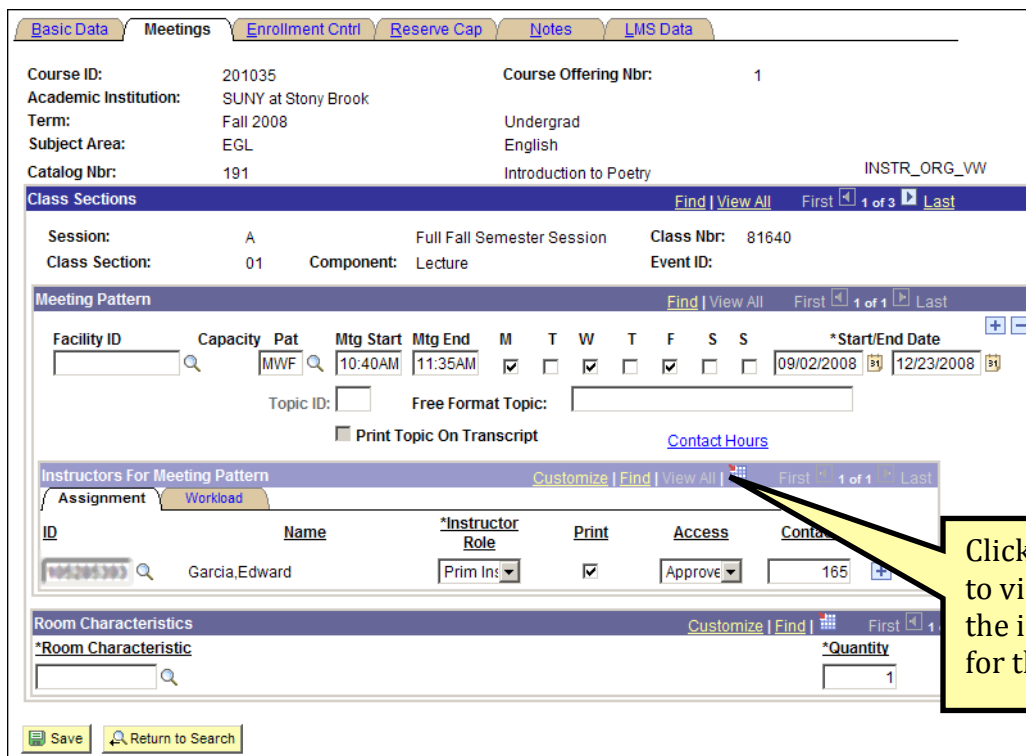
Class Sections Find | View All First 1 of 3 Last

*Session: A Full Fall Semester Session Class Nbr: 81640
*Class Section: 01 *Start/End Date: 09/02/2008 12/23/2008
*Component: LEC Lecture Event ID:
*Class Type: Enrollment
*Associated Class: 1
*Campus: WEST WEST Add Fee

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

IMPORTANT! If this is a course that is combined with other courses, you cannot update the information here. You must go to the **Schedule Class Meetings** page (*Curriculum Management > Schedule of Classes > Schedule Class Meetings*). Note: Combined courses must be "linked" by the Registrar's Office first.

The completion of accurate information on this page is essential for reporting Workload Analysis information to SUNY. Instructors should be assigned right away. Other information on the **Meetings** page is opened for editing after the enrollment snapshot.



Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | LMS Data

Course ID: 201035 Course Offering Nbr: 1
Academic Institution: SUNY at Stony Brook
Term: Fall 2008 Undergrad
Subject Area: EGL English
Catalog Nbr: 191 Introduction to Poetry INSTR_ORG_VW

Class Sections Find | View All First 1 of 3 Last

Session: A Full Fall Semester Session Class Nbr: 81640
Class Section: 01 Component: Lecture Event ID:
Meeting Pattern Find | View All First 1 of 1 Last

Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S *Start/End Date
MWF 10:40AM 11:35AM [x] [] [x] [] [x] [] [] 09/02/2008 12/23/2008

Topic ID: Free Format Topic: Print Topic On Transcript Contact Hours

Instructors For Meeting Pattern Customize | Find | View All First 1 of 1 Last

ID	Name	*Instructor Role	Print	Access	Contact
605205300	Garcia,Edward	Prim Ins	[x]	Approve	165

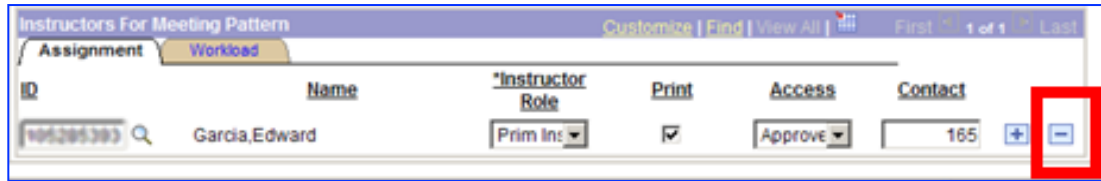
Room Characteristics Customize | Find | View All First 1 of 1 Last

*Room Characteristic *Quantity
1

Save Return to Search

Click View All to view all of the instructors for this class.

Remove existing instructors by clicking the **Delete Row**  button.



Then, complete the **Instructor** information for each person associated with the class:

1. Enter the **Instructor's Stony Brook ID** in the **ID** field.

 If you do not know the ID number, click the **LOOKUP** button and search for the instructor by **Last name** and **First name**.

Note: If the field turns red and the instructor cannot be found in the list of valid instructors for your department, you must check the **Instructor Advisor table**.

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

2. Select the **Instructor Role**; there are 5 possible roles:

Primary Instructor	<p>Assign to the instructor fully responsible for the course based on the course instruction or contact minutes. Most often the Primary Instructor is a faculty member; however, a graduate student can be the Primary Instructor if the graduate student is solely responsible for the scheduled course.</p> <p>For multi-component courses, assign the instructor as Primary Instructor on the lecture and <i>supervisor</i> on the additional sections (e.g., lab, recitation). This can allow the lecture Primary Instructor grading access for the additional sections.</p> <p>For multi-component courses, do NOT assign the instructor a role of Primary Instructor on both the lecture and additional sections (e.g., lab, recitation) unless that same instructor is fully responsible for those sections.</p> <p>In the instances where teaching responsibility is shared between more than one instructor, indicate a maximum of ONE Primary Instructor based on the course contact minutes (i.e., instruction). Additional instructors should be assigned the role of Secondary Instructor.</p>
---------------------------	---

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

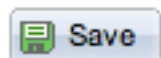
- If you want the instructor to appear in the Class Schedule and in SOLAR Class Search for this class, check the **Print** option. *Supervisors, Administrators and Reader/Graders should never be printed in the Class Schedule.*
- Select the instructor's level of access to rosters and grade submission in SOLAR. **Only one person per class can have Approve access** (usually the Primary Instructor, Secondary Instructor, or Supervisor). *TAs, Administrators, and Reader/Graders should NOT have Approve access.*

Access	View Roster	Input Grades	Submit Grades
Approve	Yes	Yes	Yes
Grade	Yes	Yes	No
None	Yes	No	No

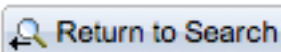
- In general, departments do not have to enter **Contact** minutes as they are calculated from section start and end times and entered automatically for reporting purposes.



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



You should **save** after each section that you update. To update another section go click the **Next Row** button next to Class Section.



To remain in this component and search for another course, click the **Return to Search** button.

5. Update Room/Days/Time in PeopleSoft Scheduling Classes

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

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

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Maintain Schedule of Classes
Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Academic Institution: = [v] USBNY [Q]
Term: = [v] 1084 [Q]
Subject Area: = [v] EGL [Q]
Catalog Nbr: begins with [v] 191 [Q]
Academic Career: = [v] [Q]
Campus: begins with [v] [Q]
Description: begins with [v] [Q]
Course ID: begins with [v] [Q]
Course Offering Nbr: = [v] [Q]

Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)

Enter the **Term**

Enter the **Subject Area**



Enter the **Catalog Nbr**

Click **Search**

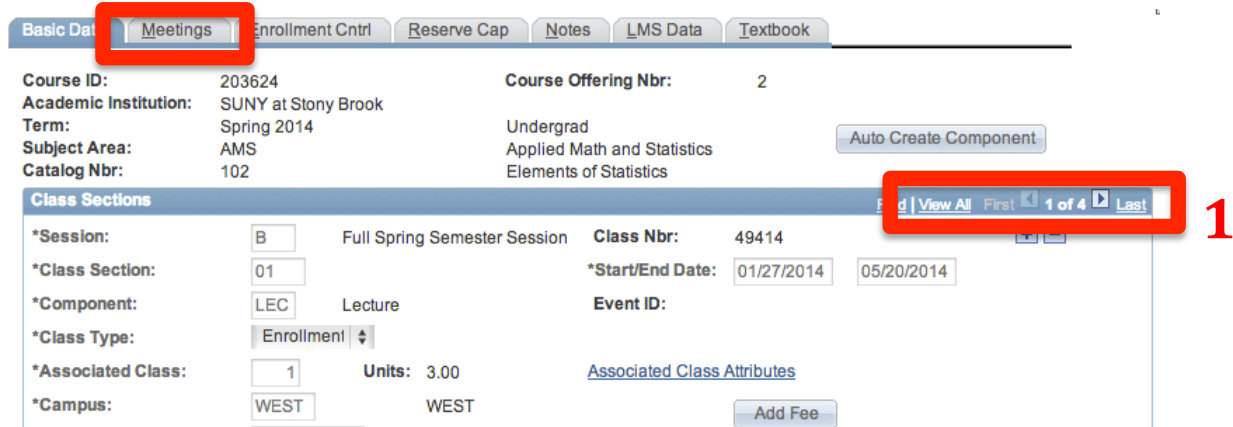
If a course was not offered in the Term that was “rolled over,” it will not be in the new Term. This course will have to be added as a “New Course” for this Term. This is done in the **Schedule New Course** component:

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Update Room, Days, Time

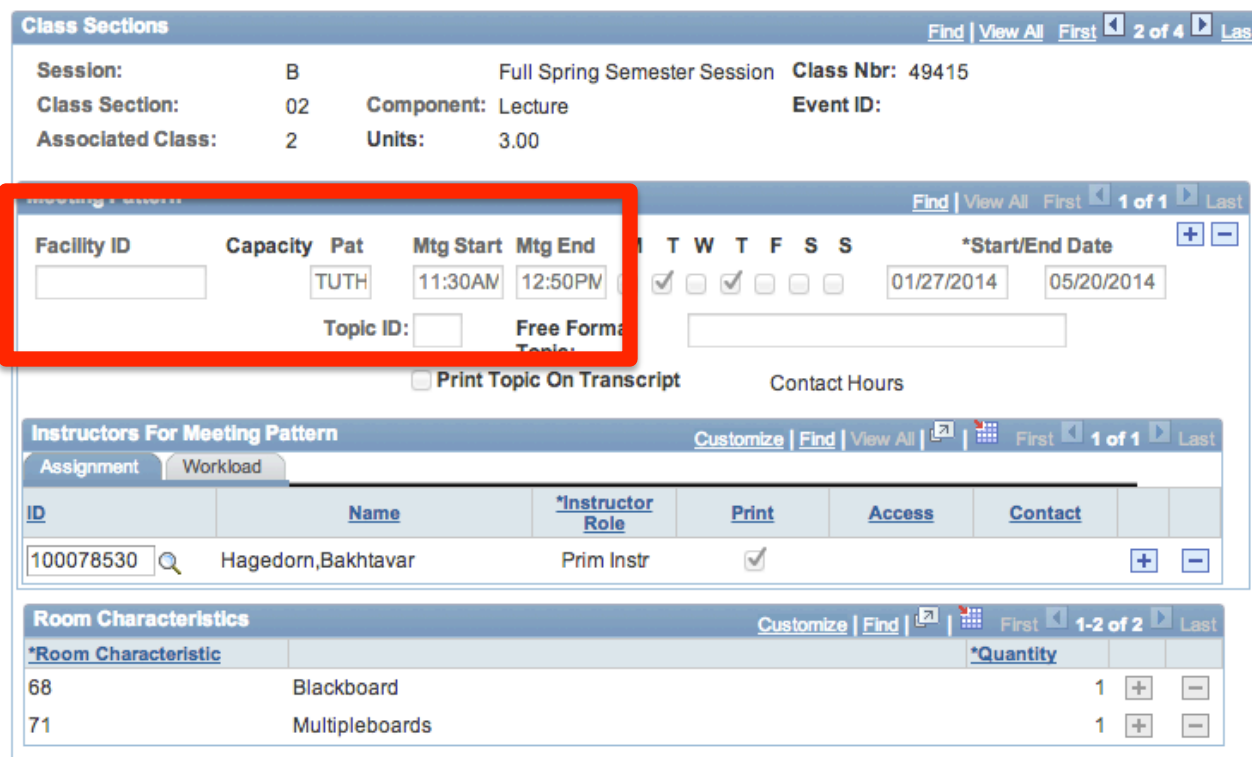
1. To navigate to the section of the course you want to update, click  and/or .
2. Click the **Meetings** tab. This is where you assign the room, meeting days/time, and instructors for the class.

2



IMPORTANT! If this course is combined with other courses (*it is if you see [Combined Section](#) above the instructor area in the meetings tab*), you cannot update the information here. You must make changes on the **Schedule Class Meetings** page (Curriculum Management > Schedule of Classes > Schedule Class Meetings). *Combined courses must be “linked” by the Registrar’s Office first.*


The completion of accurate information on the Meetings page is essential for reporting Workload Analysis information to SUNY. Instructors should be assigned right away. Other information on this page is opened for editing after the enrollment snapshot.



*Room Characteristic	*Quantity
68 Blackboard	1
71 Multipleboards	1

Facility ID

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

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

Pat

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

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

For **Tutorial** sections – use “**APPT.**”

For sections for which **hours are to be arranged**, select **HTBA**.

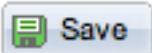
Mtg Start

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

Mtg End

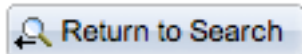
The class end time will default from the day of the week pattern and Mtg Start that you selected.

Note: Tutorial, Clinical, Supervised teaching, and distance-learning sections are entered with 1:00am to 2:00am, which must be changed to 1:00am to 1:00am.



You should **save** after each section that you update.

To update another section, click the **Next Row** button  next to Class Section.



To remain in this component and search for another course, click the **Return to Search** button.

6. Increase/Decrease the Enrollment Capacity

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the **Schedule of Classes** to reflect any changes for the new Term. Perhaps, in order to meet demand, you have to increase the enrollment capacity to allow more students to register for this class.

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Maintain Schedule of Classes
Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Academic Institution: = [v] USBNY [Q]
Term: = [v] 1084 [Q]
Subject Area: = [v] EGL [Q]
Catalog Nbr: begins with [v] 191 [Q]
Academic Career: = [v] [Q]
Campus: begins with [v] [Q]
Description: begins with [v] [Q]
Course ID: begins with [v] [Q]
Course Offering Nbr: = [v] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the **Term**

Enter the **Subject Area**



Enter the **Catalog Nbr**

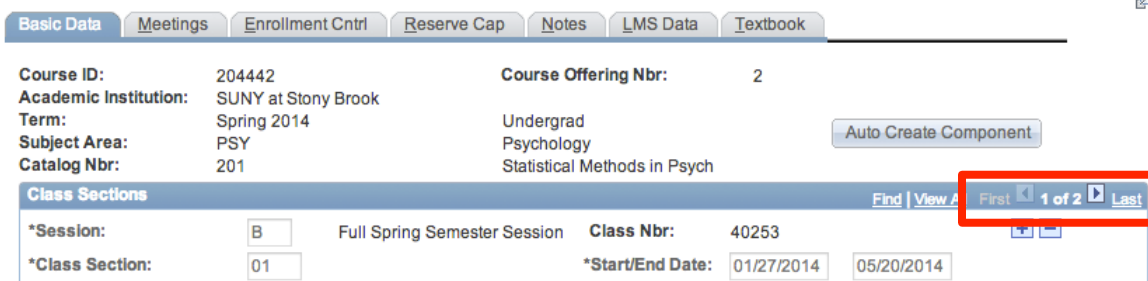
Click **Search**

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

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Increase/Decrease Enrollment Capacity

1. Click the  and  buttons to navigate to the section of the course you want to update.



Basic Data Meetings **Enrollment Cntrl** Reserve Cap Notes LMS Data Textbook

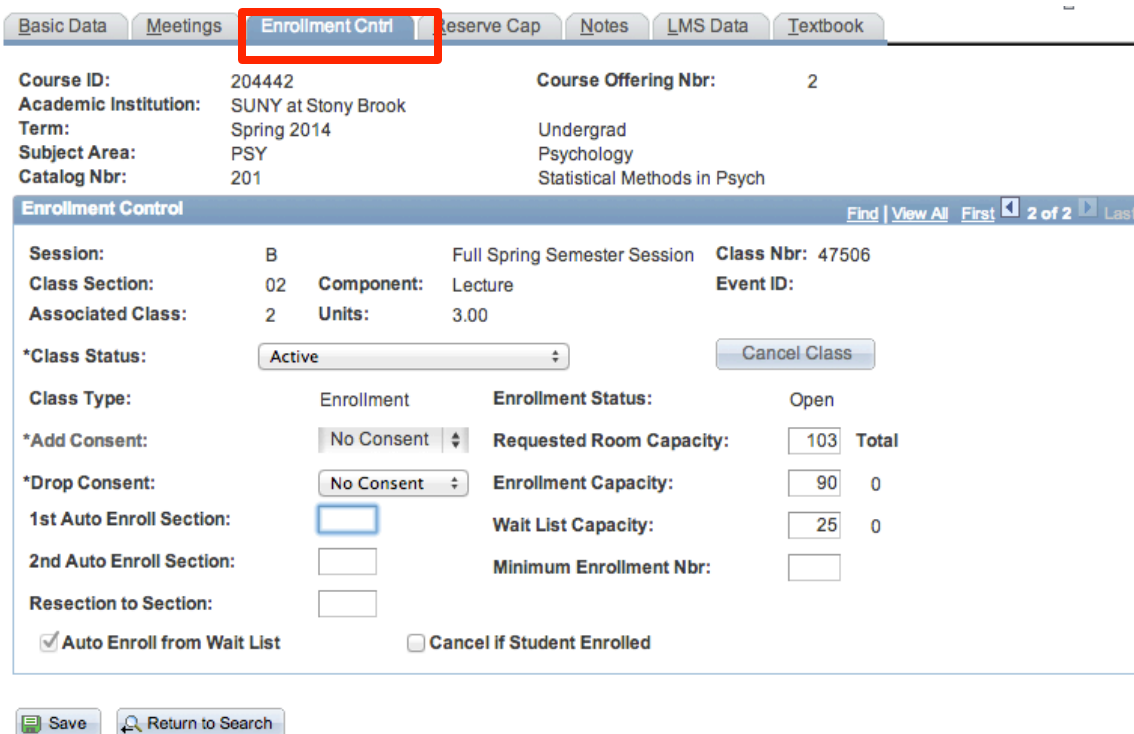
Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Auto Create Component

Class Sections Find | View All First 1 of 2 Last

*Session: B Full Spring Semester Session Class Nbr: 40253
*Class Section: 01 *Start/End Date: 01/27/2014 05/20/2014

2. Click the **Enrollment Cntrl** tab.



Basic Data Meetings **Enrollment Cntrl** Reserve Cap Notes LMS Data Textbook

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Enrollment Control Find | View All First 2 of 2 Last

Session: B Full Spring Semester Session Class Nbr: 47506
Class Section: 02 Component: Lecture Event ID:
Associated Class: 2 Units: 3.00

*Class Status: Active Cancel Class

Class Type: Enrollment Enrollment Status: Open

*Add Consent: No Consent Requested Room Capacity: 103 Total
*Drop Consent: No Consent Enrollment Capacity: 90 0
1st Auto Enroll Section: Wait List Capacity: 25 0
2nd Auto Enroll Section: Minimum Enrollment Nbr:
Resection to Section:

Auto Enroll from Wait List Cancel if Student Enrolled

Save Return to Search

Requested Room Capacity

Don't change this number.

Enrollment Capacity

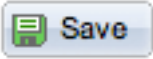
Enter the maximum number of students allowed to register for this class.

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

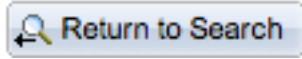
For combined courses, this number should equal the total number of students allowed to enroll in both classes combined.

Waitlist Capacity

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



You should **save** after each section that you update. To update another section go click the **Next Row** button next to Class Section.



To remain in this component and search for another course, click the **Return to Search** button.

7. Reserve Capacity

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the **Schedule of Classes** to reflect any changes for the new Term. Perhaps, you need to add reserved seats for certain student groups.

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Maintain Schedule of Classes
Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Academic Institution: = [v] USBNY [Q]
Term: = [v] 1084 [Q]
Subject Area: = [v] EGL [Q]
Catalog Nbr: begins with [v] 191 [Q]
Academic Career: = [v] [Q]
Campus: begins with [v] [Q]
Description: begins with [v] [Q]
Course ID: begins with [v] [Q]
Course Offering Nbr: = [v] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the **Term**

Enter the **Subject Area**



Enter the **Catalog Nbr**

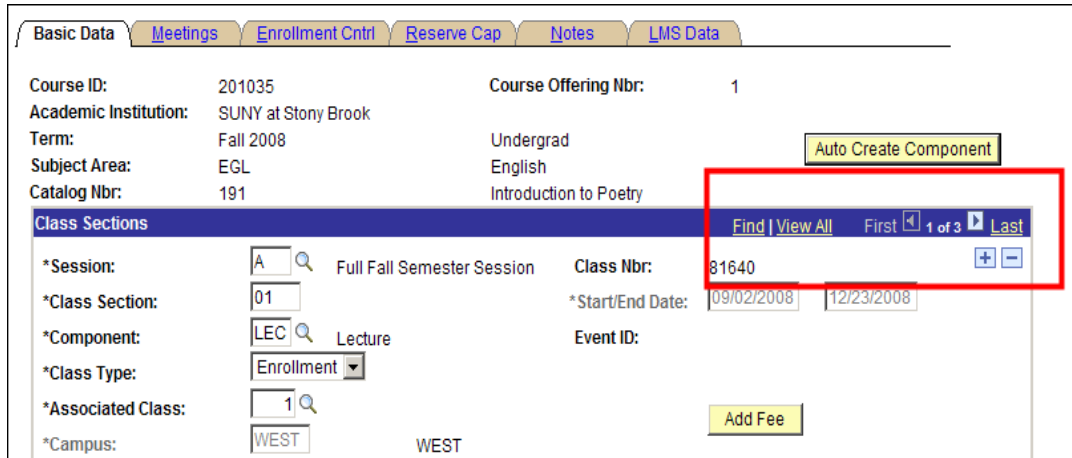
Click **Search**

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

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

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

1. Click the  and  buttons to navigate to the section of the course you want to update



Basic Data | Meetings | Enrollment Cntrl | **Reserve Cap** | Notes | LMS Data

Course ID: 201035 Course Offering Nbr: 1
 Academic Institution: SUNY at Stony Brook
 Term: Fall 2008 Undergrad
 Subject Area: EGL English
 Catalog Nbr: 191 Introduction to Poetry

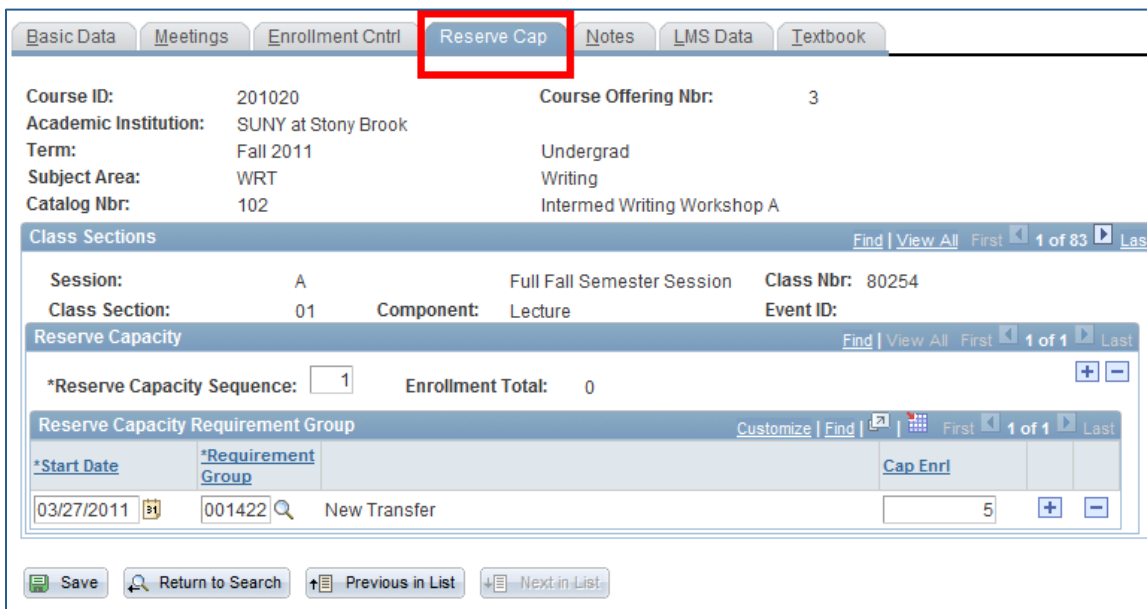
Auto Create Component

Class Sections Find | View All First 1 of 3 Last

*Session: A Full Fall Semester Session Class Nbr: 81640
 *Class Section: 01 *Start/End Date: 09/02/2008 12/23/2008
 *Component: LEC Lecture Event ID:
 *Class Type: Enrollment
 *Associated Class: 1
 *Campus: WEST WEST

Add Fee

2. Click the **Reserve Cap** tab.



Basic Data | Meetings | Enrollment Cntrl | **Reserve Cap** | Notes | LMS Data | Textbook

Course ID: 201020 Course Offering Nbr: 3
 Academic Institution: SUNY at Stony Brook
 Term: Fall 2011 Undergrad
 Subject Area: WRT Writing
 Catalog Nbr: 102 Intermed Writing Workshop A

Class Sections Find | View All First 1 of 83 Last

Session: A Full Fall Semester Session Class Nbr: 80254
 Class Section: 01 Component: Lecture Event ID:

Reserve Capacity Find | View All First 1 of 1 Last

*Reserve Capacity Sequence: 1 Enrollment Total: 0

Reserve Capacity Requirement Group Customize | Find First 1 of 1 Last

*Start Date	*Requirement Group	Cap Enrl
03/27/2011	001422 New Transfer	5

Save Return to Search Previous in List Next in List

Reserve Capacity Sequence

A Reserve Capacity Sequence number is assigned to each Requirement Group that you add for this class. Reserve Capacity Sequence #1 has priority over Reserve Capacity Sequence #2. If a student meets more than one requirement, he/she will be placed in the class based on the highest priority group.

Enrollment Total

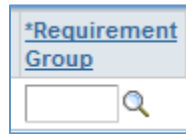
This number tells you how many students are currently in each reserve capacity sequence.


Start Date

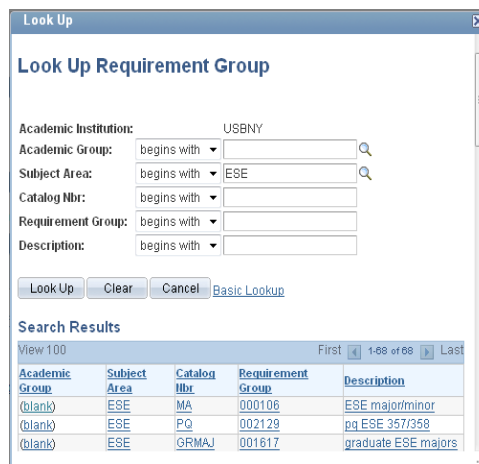
The Start Date will automatically be set for the beginning of advance registration for the Term. This date is very important! Only change it to activate or inactivate a reserve group on a specific date other than the beginning of advance registration.

Requirement Group

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



Click  to search the list of Requirement Groups.



Academic Group	Subject Area	Catalog Nbr	Requirement Group	Description
(blank)	ESE	MA	000106	ESE major/minor
(blank)	ESE	PQ	002129	pg ESE 357/358
(blank)	ESE	GRMAJ	001617	graduate ESE majors

You can search the list by entering an **Academic Group**, **Subject Area**, or **Description**.

Examples of Requirement

Groups:

U1 = Freshmen

U2 = Sophomores

U3 = Juniors

U4 = Seniors

New Transfer = Transfer students

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

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


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

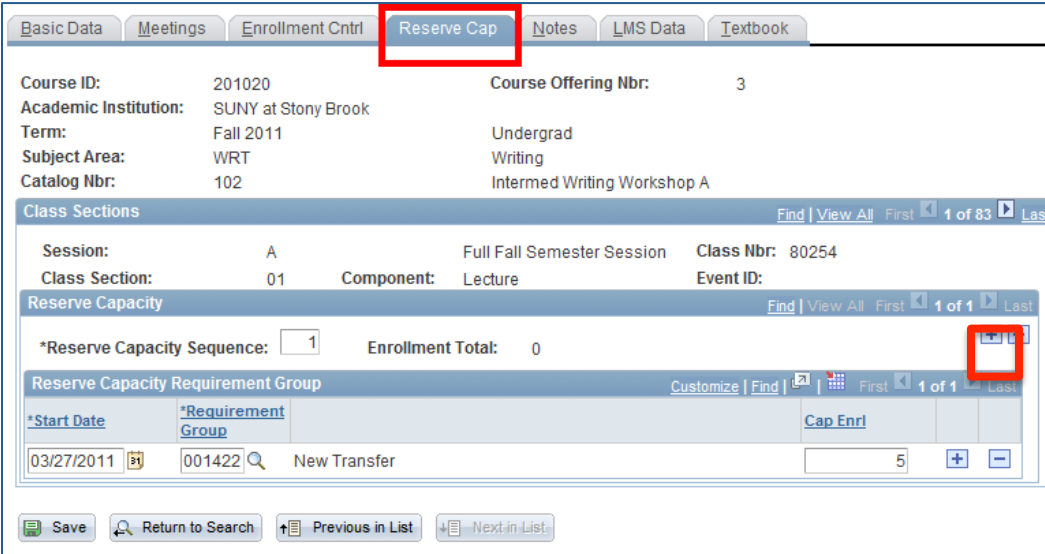
AFS U4 MAJOR will allow you reserve seats only for seniors majoring in Africana Studies

Cap Enrl

Enter the number of seats you want to reserve for this group of students.

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


3. Click  to add more than one Reserve Capacity Sequence




The screenshot shows the 'Reserve Cap' tab selected. The 'Reserve Capacity Requirement Group' table has the following data:

*Start Date	*Requirement Group	Cap Enrl
03/27/2011	001422	5


4. To add a Requirement Group:

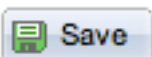
- Click in the **Reserve Capacity Sequence** field and click  to the right of this field.
- A new sequence number will be assigned to each group that you add in order of priority.
- Select the **Requirement Group** and **Cap Enrl**.

5. To delete a group:

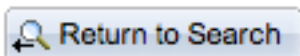
- Scroll to the correct **Reserve Capacity Sequence** number by clicking the Next/Previous row buttons
- Click  to the right of the **Reserve Capacity Sequence** field.

6. If you want to make a certain group Inactive after a certain date:

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



Click the **Save** button to save your changes.



To remain in this component and search for another course to update, click the **Return to Search** button

8. Change Class Status to Inactive

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

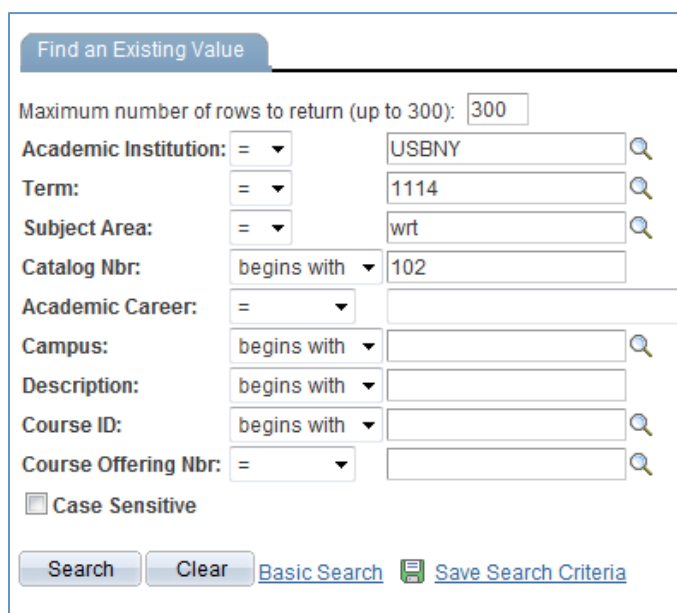
The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the **Schedule of Classes** to reflect any changes for the new Term. Perhaps you are not able to offer all sections of a particular course. Instead of deleting sections, just change their statuses to “Inactive.”

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes >



The screenshot shows a search form titled "Find an Existing Value". It includes a text input for "Maximum number of rows to return (up to 300):" with the value "300". Below this are several search criteria fields, each with a dropdown menu and a search icon: "Academic Institution:" (value: USBNY), "Term:" (value: 1114), "Subject Area:" (value: wrt), "Catalog Nbr:" (value: begins with 102), "Academic Career:" (value: =), "Campus:" (value: begins with), "Description:" (value: begins with), "Course ID:" (value: begins with), and "Course Offering Nbr:" (value: =). There is also a checkbox for "Case Sensitive". At the bottom, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

Enter the **Term**.

Enter the **Subject Area**.



Enter the **Catalog Number**.

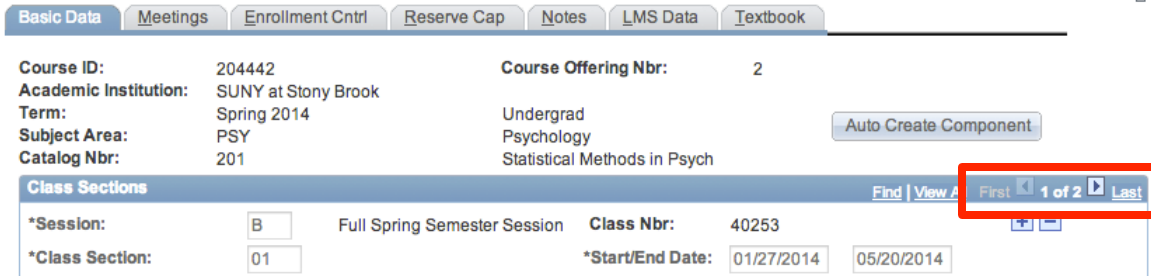
Click **Search**.

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

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Inactivate a Class

3. Click the  and  buttons to navigate to the section of the course you want to inactivate.



Basic Data Meetings Enrollment Cntrl Reserve Cap Notes LMS Data Textbook

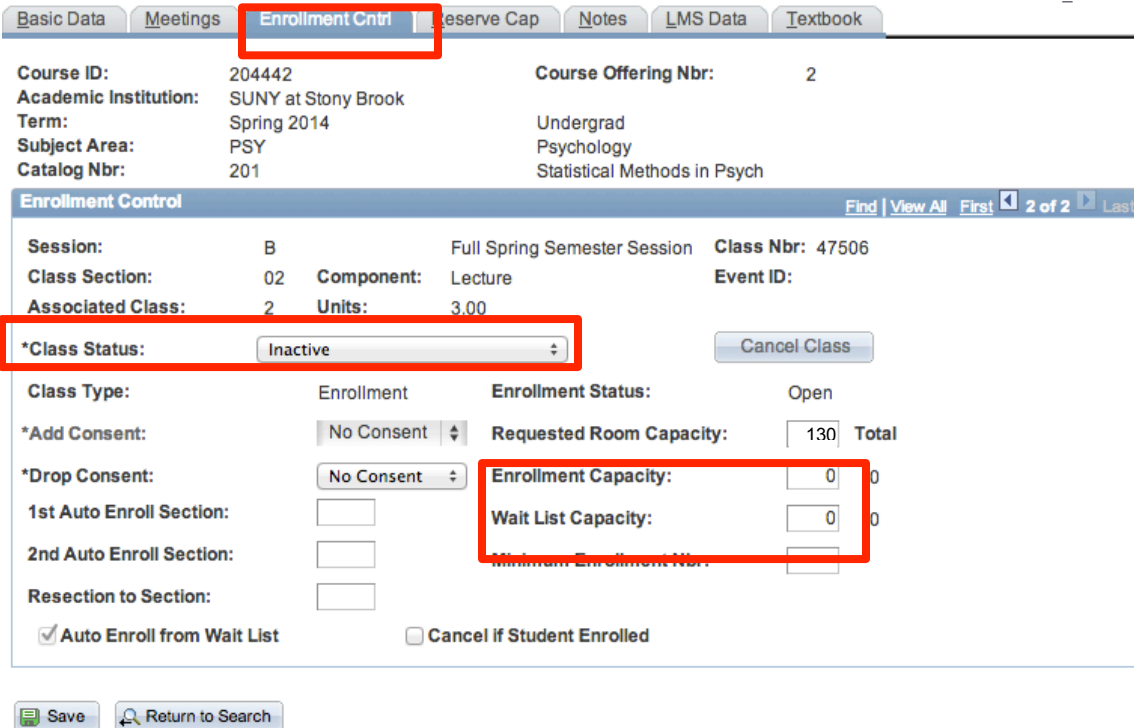
Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Auto Create Component

Class Sections Find | View All First 1 of 2 Last

*Session: B Full Spring Semester Session Class Nbr: 40253
*Class Section: 01 *Start/End Date: 01/27/2014 05/20/2014

4. Click the **Enrollment Cntrl** tab
5. Change the Class Status field to Inactive
6. Set Enrollment and Wait List Capacity fields to 0



Basic Data Meetings Enrollment Cntrl Reserve Cap Notes LMS Data Textbook

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych


Enrollment Control Find | View All First 2 of 2 Last

Session: B Full Spring Semester Session Class Nbr: 47506
Class Section: 02 Component: Lecture Event ID:
Associated Class: 2 Units: 3.00

*Class Status: Inactive Cancel Class

Class Type: Enrollment Enrollment Status: Open
*Add Consent: No Consent Requested Room Capacity: 130 Total
*Drop Consent: No Consent Enrollment Capacity: 0
1st Auto Enroll Section: Minimum Enrollment Nbr: 0
2nd Auto Enroll Section: Wait List Capacity: 0
Resection to Section:
 Auto Enroll from Wait List Cancel If Student Enrolled

Save Return to Search

- Click the **Meetings** tab.
- Delete **all** instructors assigned to this section by clicking the  to the right for each. If you do not do this, the class will still be displayed in the instructor's list of classes in the Faculty Center in SOLAR.
- It is not necessary to renumber the remaining sections. Just leave them as numbered.

Basic Data **Meetings** Enrollment Cntrl Reserve Cap Notes LMS Data Textbook

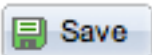
Course ID: 204442 Course Offering Nbr: 2
 Academic Institution: SUNY at Stony Brook
 Term: Spring 2014 Undergrad
 Subject Area: PSY Psychology
 Catalog Nbr: 201 Statistical Methods in Psych

Class Sections Find View All First 1 of 2 Last
 Session: B Full Spring Semester Session Class Nbr: 40253
 Class Section: 01 Component: Lecture Event ID:
 Associated Class: 1 Units: 3.00

Meeting Pattern Find View All First 1 of 1 Last
 Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S *Start/End Date
 MWF 10:00AM 10:53AM 01/27/2014 05/20/2014
 Topic ID: Free Format Topic:
 Print Topic On Transcript Contact Hours

Instructors For Meeting Pattern Customize Find View All First 1-2 of 3 Last
 Assignment Workload

ID	Name	*Instructor Role	Print	Access	Contact		
104664052		Prim Instr	<input checked="" type="checkbox"/>	Approve	165	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		TA Rdr/Grd	<input checked="" type="checkbox"/>	Grade		<input type="checkbox"/>	<input checked="" type="checkbox"/>



Click **Save**.

9. Add More Course Sections

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the **Schedule of Classes** to reflect any changes for the new Term. Perhaps, in order to meet demand, you have to add more sections to a course.

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

Maintain Schedule of Classes
Enter any information you have and click Search. Leave fields blank for a list of

Find an Existing Value

Academic Institution: = [USBNY] [Search]
Term: = [1084] [Search]
Subject Area: = [EGL] [Search]
Catalog Nbr: begins with [191]
Academic Career: = [] [Search]
Campus: begins with [] [Search]
Description: begins with [] [Search]
Course ID: begins with [] [Search]
Course Offering Nbr: = [] [Search]

Case Sensitive

[Search] [Clear] [Basic Search](#) [Save Search Criteria](#)

Enter the **Term**

Enter the **Subject Area**




Enter the **Catalog Nbr**

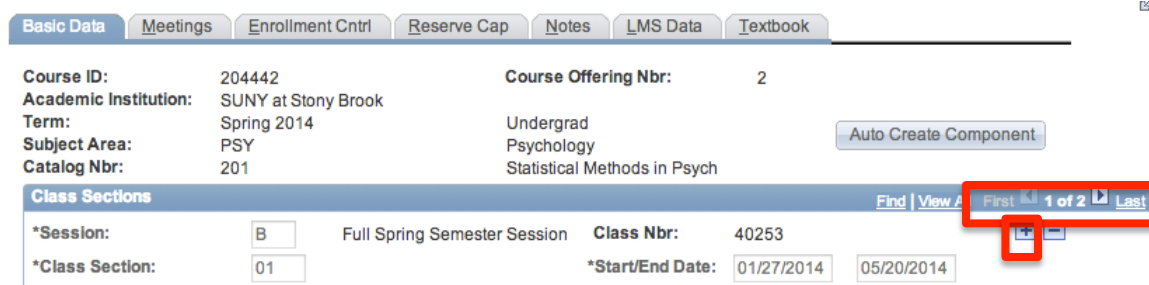
Click **Search**

Note: If a course was not offered or was not active in the Term that was “rolled over,” it will not be in the new Term. This course will have to be added as a “New Course” (rather than a new section) for this Term. This is done in the **Schedule New Course** component:

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Add More Course Sections

1. Click the  and  buttons to navigate to the last section of the course
2. Click  to add a new section.

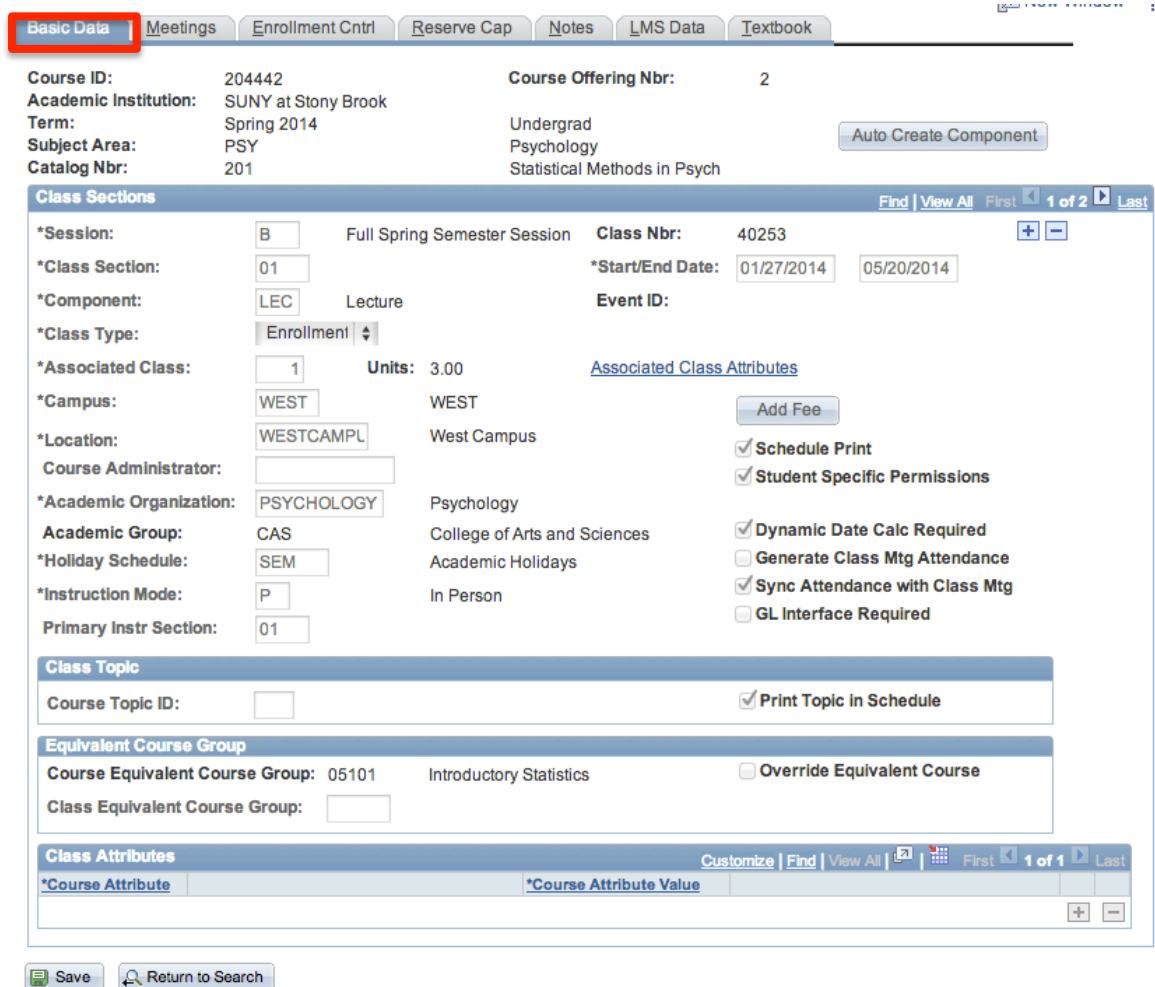


The screenshot shows the 'Basic Data' tab selected. The course information is as follows:

Course ID:	204442	Course Offering Nbr:	2
Academic Institution:	SUNY at Stony Brook		
Term:	Spring 2014	Undergrad	
Subject Area:	PSY	Psychology	
Catalog Nbr:	201	Statistical Methods in Psych	

Buttons for 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', 'LMS Data', and 'Textbook' are visible. The 'Class Sections' section shows '1 of 2' sections, with 'First' and 'Last' buttons highlighted in red.

3. Click the **Basic Data** tab and check/enter the following **bold** information:



The screenshot shows the 'Basic Data' tab selected. The course information is as follows:

Course ID:	204442	Course Offering Nbr:	2
Academic Institution:	SUNY at Stony Brook		
Term:	Spring 2014	Undergrad	
Subject Area:	PSY	Psychology	
Catalog Nbr:	201	Statistical Methods in Psych	

The 'Class Sections' section shows the following fields:

*Session:	B	Full Spring Semester Session	Class Nbr:	40253
*Class Section:	01		*Start/End Date:	01/27/2014 05/20/2014
*Component:	LEC	Lecture	Event ID:	
*Class Type:	Enrollment			
*Associated Class:	1	Units: 3.00	Associated Class Attributes	
*Campus:	WEST	WEST	Add Fee	
*Location:	WESTCAMPL	West Campus	<input checked="" type="checkbox"/> Schedule Print	
Course Administrator:			<input checked="" type="checkbox"/> Student Specific Permissions	
*Academic Organization:	PSYCHOLOGY	Psychology	<input checked="" type="checkbox"/> Dynamic Date Calc Required	
Academic Group:	CAS	College of Arts and Sciences	<input type="checkbox"/> Generate Class Mtg Attendance	
*Holiday Schedule:	SEM	Academic Holidays	<input checked="" type="checkbox"/> Sync Attendance with Class Mtg	
*Instruction Mode:	P	In Person	<input type="checkbox"/> GL Interface Required	
Primary Instr Section:	01			

The 'Class Topic' section shows:

Course Topic ID:		<input checked="" type="checkbox"/> Print Topic in Schedule
------------------	--	---

The 'Equivalent Course Group' section shows:


Course Equivalent Course Group:	05101	Introductory Statistics	<input type="checkbox"/> Override Equivalent Course
Class Equivalent Course Group:			


The 'Class Attributes' section shows a table with columns for *Course Attribute and *Course Attribute Value.

Buttons for 'Save' and 'Return to Search' are visible at the bottom.

Session:

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

Class Section	Each section is assigned a code as follows:
LECTURE	01, 02, 03, etc.
RECITATION	R01, R02, R03, etc.
LABORATORY	L01, L02, L03, etc.
SEMINAR	S01, S02, S03, etc.
TUTORIAL	T01, T02, T03, etc.
SUPERVISED	V01, V02, V03, etc.
CLINICAL	C01, C02, C03, etc.
ONLINE	30, 31, 32, 33, etc.
MANHATTAN	60, 61, 62, 63, etc.
Class Number:	Each section of a course is automatically assigned a Class Number <u>after you save</u> .
Start/End Date:	These dates default from the Academic Calendar.
Component	Some courses have more than one component (lecture, recitation, seminar, tutorial, etc.). Valid components for this course have already been set up in the Course Catalog. Click the  button to choose the component for this section.
Class Type	Select Enrollment or Non-Enrollment . For auto-enroll courses with more than one component, the component that the student must enroll in is set to Enrollment and the component that the student gets automatically enrolled in is set to Non-enrollment . For example, for courses with a Lecture and Lab, the Lab may be the Enrollment component and the Lecture may be the Non-Enrollment component.
Associated Class	The main purpose of this field is to associate multi-component courses. For single component courses, the Associated Class number is the same as the Section number without the zero (i.e., Lecture 01 is Associated Class 1). For multiple component courses , all of the non-enrollment sections (Lectures) are assigned Associated Class 9999 and the enrollment sections (Recitations and Labs) are assigned the same as the Section number without the zero as stated above (i.e., Lab 01 is Associated Class 1).

Campus	Defaults to the campus where the course is held (West, HSC, Southampton, Manhattan, SUTRA (SPD)).
Location	Select West Campus, Southampton Campus, Off Campus, International Academic Program, or Online.
Course Administrator	Not used.
Academic Organization:	Defaults to the department offering the course. Do not change.
Academic Group	Defaults to the department's College or School.
Holiday Schedule	Defaults to Academic Holidays or HSC Academic Holidays.
Instructor Mode	Defaults to "In Person." If this is an online class, select "World Wide Web".
Primary Instr Section	Defaults to the Section number.
Schedule Print:	Indicates whether the class should be printed in the Class Schedule and MS Review report and appear in SOLAR.
Student Specific Permissions	When this option is checked, the department has the ability to issue permission for students to enroll in the class if it's full or if they don't meet certain pre-requisites.
Course Topic ID	<p>If this is a course with different topics, select the topic for this section by clicking the  button.</p> <p>Setting up the Topic here will allow the Topic Title to print in the Class Schedule and on student transcripts. You can have multiple topics for different sections of a single course in one semester. This is especially useful for graduate courses. If the topic you want isn't listed, contact the appropriate Dean's Office and ask them to add the topic title to the Course Catalog so you can schedule it.</p>
Course Equivalent Course Group	Displays the course equivalents.
Course Attribute	Select the value only if applicable to your classes; otherwise, leave blank (i.e., Study Abroad/Exchange Courses, Contract Course, SPD, PEP, etc.).

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

IMPORTANT! If this is a course that is combined with other courses, you cannot update the information here. You must go to the **Schedule Class Meetings** page (*Curriculum Management > Schedule of Classes > Schedule Class Meetings*). *Note: Combined courses must be "linked" by the Registrar's Office first.*

The completion of accurate information on this page is essential for reporting Workload Analysis information to SUNY. Instructors should be assigned right away. Other information on the **Meetings** page is opened for editing after the enrollment snapshot.

The screenshot shows the 'Meetings' tab selected in a course management interface. The 'Instructors For Meeting Pattern' section is highlighted with a red box. It contains a table with the following data:

ID	Name	*Instructor Role	Print	Access	Contact
		Prim Instr	<input checked="" type="checkbox"/>		

Facility ID

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



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

Pat

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

For **Recitation** sections, use the meeting pattern codes that begins with **RE** only. These are 55-minute meeting time blocks.

For **Tutorial** sections, use **APPT**.

For sections where **hours are to be arranged**, select **HTBA**.

Mtg Start

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

Mtg End

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

Note: Tutorial, Clinical, Supervised teaching, and distance-learning sections are entered with 1:00am to 2:00am, **which must be changed to 1:00am to 1:00am.**

Combined Sections

Combined sections have to be set up in advance by the Registrar's Office, but should be scheduled even if the Registrar's Office will be combining at a later date. You will see the Combined Sections link on this page once the Registrar's office has linked the courses. Click it to see the Combined Section Detail.

IMPORTANT: Be sure to correspond with the co-offering department to coordinate scheduling as only one department can schedule the combined course.

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

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

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

ID

Enter the instructor's Stony Brook ID.



If you do not know the ID number, click the **LOOKUP** button and search for the instructor by **First name** and **Last name**.

Note: If the field turns red or the instructor is not in the list, you must check the **Instructor Advisor table**.


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



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

Complete the **Instructor** information for each person associated with the class:

6. Enter the **Instructor's Stony Brook ID** in the **ID** field.

If you do not know the ID number, click  the button and search for the instructor by **Last name** and **First name**.

Note: If the field turns red and the instructor cannot be found in the list of valid instructors for your department, you must check the **Instructor Advisor table**.

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

7. Select the **Instructor Role**; there are 5 possible roles:

Primary Instructor	<p>Assign to the instructor fully responsible for the course based on the course instruction or contact minutes. Most often the Primary Instructor is a faculty member; however, a graduate student can be the Primary Instructor if the graduate student is solely responsible for the scheduled course.</p> <p>For multi-component courses, assign the instructor as Primary Instructor on the lecture and <i>supervisor</i> on the additional sections (e.g., lab, recitation). This can allow the lecture Primary Instructor grading access for the additional sections.</p> <p>For multi-component courses, do NOT assign the instructor a role of Primary Instructor on both the lecture and additional sections (e.g., lab, recitation) unless that same instructor is fully responsible for those sections.</p> <p>In the instances where teaching responsibility is shared between more than one instructor, indicate a maximum of ONE Primary Instructor based on the course contact minutes (i.e., instruction). Additional instructors</p>
---------------------------	--

	should be assigned the role of Secondary Instructor.
--	--

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

8. If you want the instructor to appear in the Class Schedule and in SOLAR Class Search for this class, check the **Print** option. *Supervisors, Administrators and Reader/Graders should never be printed in the Class Schedule.*
9. Select the instructor's level of access to rosters and grade submission in SOLAR. **Only one person per class can have Approve access** (usually the Primary Instructor, Secondary Instructor, or Supervisor). *TAs, Administrators, and Reader/Graders should NOT have Approve access.*

Access	View Roster	Input Grades	Submit Grades
Approve	Yes	Yes	Yes
Grade	Yes	Yes	No
None	Yes	No	No

10. In general, departments do not have to enter **Contact** minutes as they are calculated from section start and end times and entered automatically for reporting purposes.

1. Click the **Enrollment Cntrl** tab.

This is where you indicate the class status as well as the room, enrollment, and waitlist capacities.

Only active classes will “roll” from the previous year with the **Class Status** from that year. Remember to check the **Class Status** for every class when you begin scheduling for a new Term!

Basic Data Meetings **Enrollment Cntrl** Reserve Cap Notes LMS Data Textbook

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Enrollment Control Find | View All First 1 3 of 3 Last

Session: B Full Spring Semester Session Class Nbr: 0
Class Section: Component: Lecture Event ID:
Associated Class: 1 Units: 3.00
*Class Status: Active Cancel Class
Class Type: Enrollment Enrollment Status: Closed
*Add Consent: No Consent Requested Room Capacity: 55 Total
*Drop Consent: No Consent Enrollment Capacity: 55 0
1st Auto Enroll Section: Wait List Capacity: 0
2nd Auto Enroll Section: Minimum Enrollment Nbr:
Resection to Section:
 Auto Enroll from Wait List Cancel if Student Enrolled

Save Return to Search

Class Status

Select **ACTIVE**.

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

Add Consent

Department or **Instructor** indicates that the student needs department or instructor permission to register for this class. **No Consent** indicates that the student can register without permission. If this is incorrect, contact the Registrar’s Office as you can’t change this.

Drop Consent

Not used.

1st Auto Enroll Section

These fields are used to associate multi-component sections for auto-enroll. If this is a Lab or Recitation component, enter the section number of the auto-enroll Lecture. You can also use the **Update Sections of a Class** page to do this (Main Menu > Curriculum Management > Schedule of Classes > Update Sections of a Class).

Auto-Enroll from Waitlist

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

Requested Room Capacity

Don’t change this.

Enrollment Capacity

Enter the maximum number of students allowed to register for this class.

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

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

Waitlist Capacity

If this field is *not* grayed out, waitlisting is set up for this course. Students interested in getting into the class if a seat opens up can place themselves on the waitlist. (Note: If you’re screening for prerequisites for the course, only students who have satisfied the prerequisite will be able to add themselves to the waitlist.). Enter the number of students allowed to waitlist. This number should be approximately 30% of the enrollment capacity.

Minimum Enrollment Number Not used.

Cancel if Student Enrolled Not used.

Once students begin enrolling in classes, you can refer to this page to see the **Total** number of students enrolled and on the **Waitlist**. You will also find this information on the **Class Sections** page.

Enrollment Status:	Open	
Requested Room Capacity:	<input type="text" value="577"/>	Total
Enrollment Capacity:	<input type="text" value="486"/>	329
Wait List Capacity:	<input type="text"/>	0
Minimum Enrollment Nbr:	<input type="text"/>	

These show the enrollment numbers in the course, and on the waitlist.

1. Click the **Reserve Cap** tab.

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

Course ID:	201020	Course Offering Nbr:	3
Academic Institution:	SUNY at Stony Brook		
Term:	Fall 2011	Undergrad	
Subject Area:	WRT	Writing	
Catalog Nbr:	102	Intermed Writing Workshop A	

Session:	A	Full Fall Semester Session	Class Nbr: 80254
Class Section:	01	Component: Lecture	Event ID:

*Reserve Capacity Sequence:	1	Enrollment Total:	0
-----------------------------	---	-------------------	---

*Start Date	*Requirement Group	Cap Enrl
03/27/2011	001422	5

2. Fill in these areas

Reserve Capacity Sequence

A Reserve Capacity Sequence number is assigned to each Requirement Group that you add for this class. Reserve Capacity Sequence #1 has priority over Reserve Capacity Sequence #2. If a student meets more than one requirement they will be placed in the class based on the highest priority group.

Enrollment Total

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

Start Date

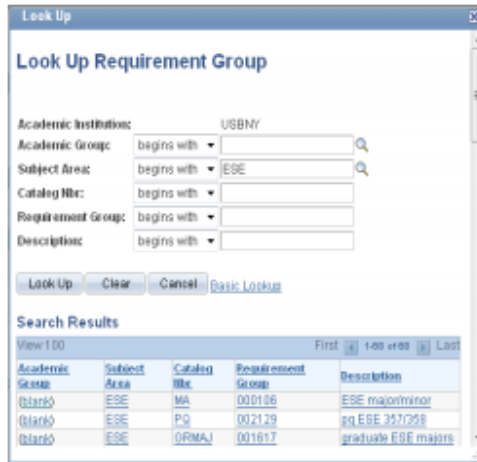
The Start Date will automatically be set for the beginning of advance registration for the Term. This date is very important! Only change it to activate or inactivate a reserve group on a specific date other than the beginning of advance registration.

Requirement Group

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

*Requirement Group

Click the **LOOKUP** button to search the list of Requirement Groups.



You can search the list by entering an **Academic Group**, **Subject Area**, or **Description**.

Examples of Requirement Groups:

- U1** = Freshmen
- U2** = Sophomores
- U3** = Juniors
- U4** = Seniors

New Transfer = Transfer students

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

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

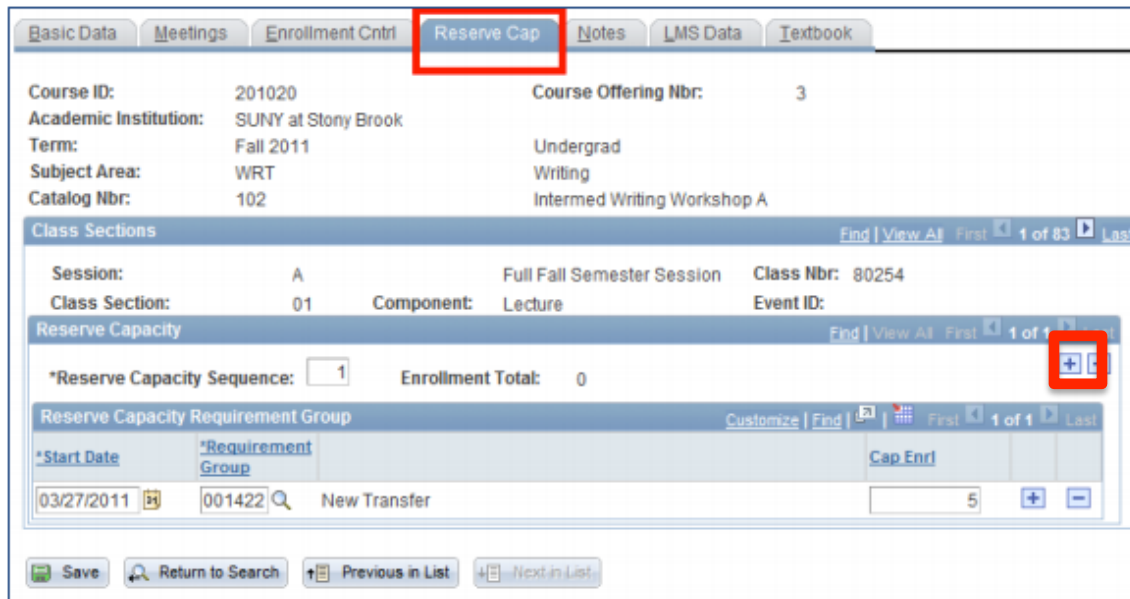
AFS MINOR will allow you reserve seats only for students minoring in Africana Studies.

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


Cap Enrl

Enter the number of seats you want to reserve for this group of students.


3. To have more than one Requirement Group for a class, click  to add more Reserve Capacities.



4. To delete a group:

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

5. *If you want to make a certain group "Inactive" after a certain date:*

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

1. Click the **Notes** tab.

The class Notes page includes special information about the class that may or may not be printed in the Class Schedule (i.e., information about exams, waitlists, reserve groups, combined courses, auto-enroll sections, etc.). Department Schedulers cannot add/change Notes. They must contact the Registrar's Office.

Basic Data Meetings Enrollment Cntrl Reserve Cap **Notes** LMS Data Textbook

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Class Sections Find | View All First 2 of 2 Last
Session: B Full Spring Semester Session Class Nbr: 47506
Class Section: 02 Component: Lecture Event ID:
Associated Class: 2 Units: 3.00

Class Notes Find | View All First 1 of 1 Last
*Sequence Number: 1
*Print Location: After Even if Class Not in Schedule
Note Nbr: Copy Note
Free Format Text: Clear Note
This course has an automatic waitlist. Some seats reserved for Psychology majors

Save Return to Search

1. Click the **LMS** tab.

The LMS fields must be completed in order for the class to be available in Blackboard.

2. Click the drop down list for **LMS Extract File Type**
3. Choose **XML V1.1 (req to authenticate)**.
4. The **LMS Extract Group ID** will automatically be completed when you tab out of the LMS Extract File Type field.

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes **LMS Data** Textbook

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Class Sections Find | View All First 2 of 2 Last

Session: B Full Spring Semester Session Class Nbr: 47506
Class Section: 02 Component: Lecture Event ID:
Associated Class: 2 Units: 3.00

Learning Management System

Provider for Authentication

LMS Extract File Type: XML V1.1 (req to authenticate)

LMS Extract Group ID: USBNY-PSY-201-SEC02

LMS URL:

Last LMS Class Extract Datetm: 04/29/2013 5:16:16AM Last LMS Enroll Extract Datetm: 04/29/2013 5:16:16AM

Save Return to Search

1. Click the **Textbook** tab.

Instructors are required to submit all of the required and suggested course materials to the Provost Liaison who then enters the information on this page, so as a scheduler, you do not need to update this page.

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes LMS Data **Textbook**

Course ID: 204442 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Spring 2014 Undergrad
Subject Area: PSY Psychology
Catalog Nbr: 201 Statistical Methods in Psych

Class Sections Find | View All First 2 of 2 Last

Session: B Full Spring Semester Session Class Nbr: 47506
Class Section: 02 Component: Lecture Event ID:
Associated Class: 2 Units: 3.00

Textbook Assignment

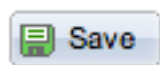
Textbook Assignment Status Pending Textbook entry complete
 No textbooks assigned to class Copy Textbooks Primary Instr: N/A

Course Materials Details Notes Customize | Find | First 1 of 1 Last

Seq No	Course Material Type	Course Material Status	Title	ISBN	Author
1					

Special Instructions

Save Return to Search



Once you have entered all of the information for this new course section click the **Save** button.

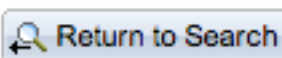


To add another section for this course, go back to the **Basic Data** page and click the **Add a New Row** button. Complete all of the information for the next section.

Remember to save after completing each section.

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

To check to see if Pre-requisite screening is turned on or off for each section of this course go to the **Adjust Class Associations** page (Main Menu > Curriculum Management > Schedule of Classes > Adjust Class Associations).



To remain in this component and search for another course to update, click the **Return to Search** button.

10. Manage Auto-Enroll Sections, Enrollment, and Waitlist Capacity

Navigation:

Main Menu > Curriculum Management > Schedule of Classes >
Update Sections of a Class

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

You will complete your scheduling for the **auto-enroll** courses here.

1. In the **Auto Enrl 1** column for the Recitation or Lab sections, enter the section number of the Lecture that students will auto-enroll into when they register for these sections.
2. Also, for all of the Lecture sections, make sure that you have entered **9999** in the **Associated Class** column.


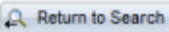
Update Sections of a Class

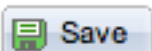
Course ID: 200679 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook Undergrad
Term: Fall 2011 Chemistry
Subject Area: CHE General Chemistry IB
Catalog Nbr: 131

Class Sections Customize | Edit | **View All**

Class Status Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Ac
Fall	01	82055	Lecture	Open	N	A	9999				N
Fall	02	82077	Lecture	Open	N	A	9999				N
Fall	03	90609	Lecture	Closed	N	S	9999				N
Fall	04	91262	Lecture	Closed	N	S	9999				N
Fall	R01	81901	Recitation	Open	E	A	1	01			N
Fall	R02	81902	Recitation	Open	E	A	2	01			N
Fall	R03	81903	Recitation	Open	E	A	3	01			N
Fall	R04	81904	Recitation	Open	E	A	4	01			N



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

1. Click the **Class Enrollment Limits** tab.
2. Use this page to edit **Enrollment Capacity** and **Waitlist Capacity** for existing classes.

Once students begin enrolling in classes, you can view **Enrollment and Waitlist Totals** here.

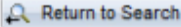
Update Sections of a Class

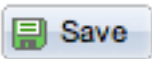
Course ID: 200679 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Fall 2011 Undergrad
Subject Area: CHE Chemistry
Catalog Nbr: 131 General Chemistry IB

Class Sections Customize | Find | View All | First 1-3 c

Class Status **Class Enrollment Limits**

Session	Section	Class Nbr	Component	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot
Fall	01	82055	Lecture	570		160	
Fall	02	82077	Lecture	570		160	
Fall	03	90609	Lecture	0			
Fall	04	91262	Lecture	0			
Fall	R01	81901	Recitation	38		10	
Fall	R02	81902	Recitation	38		10	
Fall	R03	81903	Recitation	38		10	
Fall	R04	81904	Recitation	38		10	



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

11. Add a Course That Was Not Rolled to the New Term

Each Term active classes are “rolled over” from the previous year in PeopleSoft (Fall 2014 will be rolled into Fall 2015). Department Schedulers are notified when they can begin making changes to the schedule for the new Term.

The information that defaults on the scheduling pages defaults from the Course Catalog. A course must be in the Course Catalog before you can schedule it.

The first step is to print an **MS Review** (Master Schedule Review) report to get a clear sense of what courses and what sections have been “rolled over” from the previous year.

Then, using the MS Review report as a guide, Department Schedulers update the **Schedule of Classes** to reflect any changes for the new Term. Perhaps the instructor has changed or you have to add more sections to a course.

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

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course

Schedule New Course
Enter any information you have and click Search. Leave fields blank for a list of all v

Find an Existing Value

Academic Institution: [=] USBNY [Q]

Term: [=] 1088 [Q]

Subject Area: [=] CHE [Q]

Catalog Nbr: [begins with] 134 [Q]

Academic Organization: [begins with] [Q]

Academic Career: [=] [Q]

Campus: [begins with] [Q]

Description: [begins with] [Q]

Course ID: [begins with] [Q]

Course Offering Nbr: [=] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the **Term**

Enter the **Subject Area**

Enter the **Catalog Nbr**

Click **Search**

Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | LMS Data | Textbook

Course ID: 201020 Course Offering Nbr: 3
 Academic Institution: SUNY at Stony Brook
 Term: Fall 2011 Undergrad
 Subject Area: WRT Writing
 Catalog Nbr: 102 Intermed Writing Workshop A

Auto Create Component

Class Sections Find | View All First 1 of 83 Last

*Session: A Full Fall Semester Session Class Nbr: 80254
 *Class Section: 01 *Start/End Date: 08/29/2011 12/21/2011
 *Component: LEC Lecture Event ID:
 *Class Type: Enrollment
 *Associated Class: 1
 *Campus: WEST WEST Add Fee
 *Location: WESTCAMPUS West Campus
 Course Administrator:
 *Academic Organization: WRITINGPGM Writing Program
 Academic Group: CAS College of Arts and Sciences
 *Holiday Schedule: SEM Academic Holidays
 *Instruction Mode: P In Person
 Primary Instr Section: 01

Schedule Print
 Student Specific Permissions
 Dynamic Date Calc Required
 Generate Class Mtg Attendance
 Sync Attendance with Class Mtg
 GL Interface Required

Class Topic

Course Topic ID: Print Topic in Schedule

Equivalent Course Group

Course Equivalent Course Group: Override Equivalent Course
 Class Equivalent Course Group:

Class Attributes Customize | Find | View All First 1 of 1 Last

*Course Attribute	*Course Attribute Value

Save | Return to Search | Previous in List | Next in List

1. Click the **Basic Data** tab and add the following **bold** information:


Session:


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

Class Section

Each section is assigned a code as follows:

- LECTURE** 01, 02, 03, etc.
- RECITATION** R01, R02, R03, etc.
- LABORATORY** L01, L02, L03, etc.
- SEMINAR** S01, S 02, S03, etc.
- TUTORIAL** T01, T02, T03, etc.
- SUPERVISED** V01, V02, V03, etc.
- CLINICAL** C01, C02, C03, etc.
- ONLINE** 30, 31, 32, 33, etc.
- MANHATTAN** 60, 61, 62, 63, etc.

Class Number:	Each section of a course is automatically assigned a Class Number <u>after you save</u> .
Start/End Date:	These dates default from the Academic Calendar.
Component	Some courses have more than one component (lecture, recitation, seminar, tutorial, etc.). Valid components for this course have already been set up in the Course Catalog. Click  to choose the component for this section.
Class Type	Select Enrollment or Non-Enrollment . For auto-enroll courses with more than one component, the component that the student must enroll in should be set to Enrollment , and the component that the student gets automatically enrolled in should be set to Non-enrollment . For example, for courses with a Lecture and Lab, the Lab may be the Enrollment component and the Lecture may be the Non-Enrollment component.
Associated Class	The main purpose of this field is to associate multi-component courses. For single component courses, the Associated Class number is the same as the Section number without the zero (i.e., Lecture 01 is Associated Class 1). For multiple component courses , all of the Lectures are assigned Associated Class 9999 , and the other components (Recitations and Labs) are assigned the same as the Section number without the zero as stated above (i.e., Lab 01 is Associated Class 1).

Campus	Defaults to the campus where the course is held (West, HSC, Southampton, Manhattan, SUTRA (SPD)).
Location	Select West Campus, Southampton Campus, Off Campus, International Academic Program, or Online.
Course Administrator	Not used.
Academic Organization:	Defaults to the department offering the course. Do not change.
Academic Group	Defaults to the department's College or School.
Holiday Schedule	Defaults to Academic Holidays or HSC Academic Holidays.
Instructor Mode	Defaults to "In Person." If this is an online class select "World Wide Web."
Primary Instr Section	Defaults to the Section number.
Schedule Print:	Indicates whether the class should be printed in the Class Schedule and MS Review report and appear in SOLAR.
Student Specific Permissions	When this option is checked, the department has the ability to issue permission for students to enroll in the class if it's full or if they don't meet certain pre-requisites.
Course Topic ID	<p>If this is a course with different topics, select the topic for this section by clicking  .</p> <p>Setting up the Topic here will allow the Topic Title to print in the Class Schedule and on student transcripts. You can have multiple topics for different sections of a single course in one semester. This is especially useful for graduate courses. If the topic you want isn't listed, contact the appropriate Dean's Office and ask them to add the topic title to the Course Catalog so you can schedule it.</p>
Course Equivalent Course Group	Displays the course equivalents.
Course Attribute	Select the value only if applicable to your classes; otherwise, leave blank (i.e., Study Abroad/Exchange Courses, Contract Course, SPD, PEP, etc.).

2. Click the **Meetings** tab.

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

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

The completion of accurate information on this page is essential for reporting Workload Analysis information to SUNY. Instructors should be assigned right away. Other information on the **Meetings** page is opened for editing after the enrollment snapshot.

The screenshot displays the 'Meetings' tab for a course. The 'Meetings' tab is highlighted with a red box. The form contains the following sections:

- Course Information:** Course ID: 201020, Academic Institution: SUNY at Stony Brook, Term: Fall 2011, Subject Area: WRT, Catalog Nbr: 102, Course Offering Nbr: 3, Class Nbr: 80254, Event ID: [blank].
- Meeting Pattern:** Facility ID: [blank], Capacity: [blank], Pat: MWF, Mtg Start: 2:20PM, Mtg End: 3:15PM, M: [checked], T: [checked], W: [checked], T: [checked], F: [checked], S: [checked], S: [checked], *Start/End Date: 08/29/2011 to 12/21/2011. Includes fields for Topic ID, Free Format Topic, and a checkbox for 'Print Topic On Transcript'.
- Instructors For Meeting Pattern:** A table with columns: ID, Name, *Instructor Role, Print, Access, Contact. Two instructors are listed: Hecchini, John E. (Prim In, Print checked, Access: Approve, Contact: 165) and Gomez, John (Admin, Print unchecked, Access: Grade, Contact: [blank]).
- Room Characteristics:** *Room Characteristic: [blank], *Quantity: 1.

At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', and 'Next in List'.

Facility ID

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



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

Pat

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

For **Recitation** sections, use the meeting pattern codes that begins with **RE** only. These are 55 minute meeting time blocks.

For **Tutorial** sections, use **APPT**.

For sections where **hours are to be arranged**, select **HTBA**.

Mtg Start

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

Mtg End

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

Note: Tutorial, Clinical, Supervised teaching, and distance-learning sections are entered with 1:00am to 2:00am, **which must be changed to 1:00am to 1:00am.**

Combined Sections

Combined sections have to be set up in advance by the Registrar's Office, but should be scheduled even if the Registrar's Office will be combining at a later date. You will see the Combined Sections link on this page once the Registrar's office has linked the courses. Click it to see the Combined Section Detail.

IMPORTANT: Be sure to correspond with the co-offering department to coordinate scheduling as only one department can schedule the combined course.

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

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

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

ID

Enter the instructor's Stony Brook ID.




If you do not know the ID number, click the **LOOKUP** button and search for the instructor by **First name** and **Last name**.

Note: If the field turns red or the instructor is not in the list, you must check the **Instructor Advisor table**.

- Your dept must be in the list of approved courses for the Instructor

- New instructors must be active, Effective in PeopleSoft at least one day before the start of the Term

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

Instructor Role

Select instructor(s) roles.

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

Primary Instructor	<p>Assign to the instructor fully responsible for the course based on the course instruction or contact minutes. Most often the Primary Instructor is a faculty member; however, a graduate student can be the Primary Instructor if the graduate student is solely responsible for the scheduled course.</p> <p>For multi-component courses, assign the instructor as Primary Instructor on the lecture and <i>supervisor</i> on the additional sections (e.g., lab, recitation). This can allow the lecture Primary Instructor grading access for the additional sections.</p> <p>For multi-component courses, do NOT assign the instructor a role of Primary Instructor on both the lecture and additional sections (e.g., lab, recitation) unless that same instructor is fully responsible for those sections.</p> <p>In the instances where teaching responsibility is shared between more than one instructor, indicate a maximum of ONE Primary Instructor based on the course contact minutes (i.e., instruction). Additional instructors should be assigned the role of Secondary Instructor.</p>
Secondary Instructor	<p>In the instances where teaching responsibility is shared between more than one instructor, indicate ONE Primary Instructor based on the course contact minutes and one or more Secondary Instructors.</p> <p>Note that the abbreviation “sec instr” is not intended to stand for “section instructor,” and should not be applied as such.</p>
Administrator	<p>This instructor role is not reported in CASA; however, correct setup is vital for grading access of the instructor(s). This role is useful when a course instructor has arranged for a department administrator (usually the ATC or similar) to administer the course (submit grades, manage rosters, etc.). In these cases, the primary instructor remains on the course, and a course administrator is assigned a role of "admin" plus the appropriate level of grading access.</p>
Supervisor	<p>This instructor role is not reported in CASA; however, correct setup is vital for grading access of the instructor(s). Use this for a course with multi-components (e.g., lecture/lab + recitation). The instructor (usually Faculty) should be assigned to the lecture as <i>primary instructor</i> and as the <i>supervisor</i> for each of the labs and/or recitations.</p>

TA Reader/Grader	Assign this role for Graduate students who read/grade papers but don't actually meet with students. For CASA reporting purposes, do not add hours for these.
-------------------------	--

Print

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

Access

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

Access	View Roster	Input Grades	Submit Grades
Approve	Yes	Yes	Yes
Grade	Yes	Yes	No
None	Yes	No	No

Contact

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

1. Click the **Enrollment Cntrl** tab.

This is where you indicate the class status as well as the room, enrollment, and waitlist capacities.

Only Active classes will “roll over” from the previous. Previously inactive classes will need to be added a new

Class Status
If you want to

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

Add Consent

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

Drop Consent

Not used.

1st Auto Enroll Section

These fields are used to associate multi-component sections for auto-enroll. If this is the Lab or Recitation component, enter the section number of the auto-enroll Lecture. You can also use the **Update Sections of a Class** page to do this (Main Menu > Curriculum Management > Schedule of Classes > Update Sections of a Class).

Auto-Enroll from Waitlist

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

Requested Room Capacity

Don't change this.

Enrollment Capacity

Enter the maximum number of students allowed to register for this class.

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

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

Waitlist Capacity

If this field is not grayed out, waitlisting is set up for this course. Students interested in getting into the class if a seat opens up can place themselves on the waitlist. (Note: If you're screening for prerequisites for the course, only students who have satisfied the prerequisite will be able to add themselves to the waitlist.) Enter the number of students allowed to waitlist. This number should be approximately 30% of the enrollment capacity.

Minimum Enrollment Number Not used.

Cancel if Student Enrolled Not used.

Once students begin enrolling in classes, you can refer to this page to see the **Total** number of students enrolled and on the **Waitlist**. You will also find this information on the **Class Sections** page.

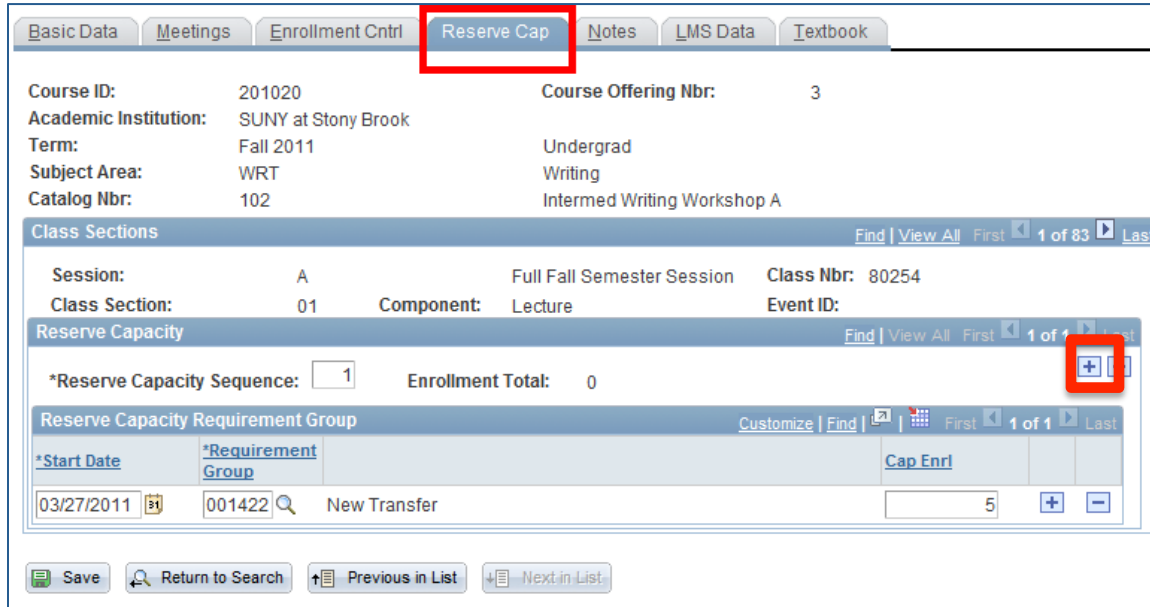
Enrollment Status:	Open		
Requested Room Capacity:	570	Total	
Enrollment Capacity:	488		329
Wait List Capacity:			0
Minimum Enrollment Nbr:			

These show the enrollment numbers in the course and on the waitlist.

1. Click the **Reserve Cap** tab.

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

2. Click  to add Reserve Capacity Sequence



*Reserve Capacity Sequence	Enrollment Total
1	0

*Start Date	*Requirement Group	Cap Enrl
03/27/2011	001422	5

Reserve Capacity Sequence

A Reserve Capacity Sequence number is assigned to each Requirement Group that you add for this class. Reserve Capacity Sequence # 1 has priority over Reserve Capacity Sequence # 2. If a student meets more than one requirement, he/she will be placed in the class based on the highest priority group.

Enrollment Total


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

Start Date

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

Requirement Group

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

Click  to see list of Requirement Groups. You can search the list by entering an **Academic Group** or **Subject Area**.

Examples of Requirement Groups:

U1 = Freshmen

U2 = Sophomores

U3 = Juniors

U4 = Seniors

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

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

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


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

Cap Enrl


Enter the number of seats you want to reserve for this group of students.

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


3. *To add a Requirement Group:*

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

4. *To delete a group:*

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

5. *If you want to make a certain group "Inactive" after a certain date:*

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

Click the **Notes** tab.

The class Notes page includes special information about the class that may or may not be printed in the Class Schedule (i.e., information about exams, waitlists, reserve groups, combined courses, auto-enroll sections, etc.). Department Schedulers cannot add/change Notes. They must contact the Registrar's Office.

Basic Data Meetings Enrollment Cntrl Reserve Cap **Notes** LMS Data Textbook

Course ID: 201020 Course Offering Nbr: 3
Academic Institution: SUNY at Stony Brook
Term: Fall 2011 Undergrad
Subject Area: WRT Writing
Catalog Nbr: 102 Intermed Writing Workshop A

Class Sections Find | V

Session: A Full Fall Semester Session Class Nbr: 80254
Class Section: 01 Component: Lecture Event ID:

Class Notes Find | V

*Sequence Number: 1
*Print Location: After Even if Class Not in Schedule
Note Nbr:
Free Format Text: Students who do not attend 1st week will be deregistered; no add/swap after 1st week; waitlisted students must attend 1st week to be eligible for

Click the **LMS** tab.

The LMS fields must be completed in order for the classes to be available in Blackboard.

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

The **LMS Extract Group ID** will automatically be completed when you tab out of the LMS

The screenshot shows the 'LMS Data' tab selected. The 'Learning Management System' section is expanded, showing the following fields:

- Provider for Authentication: [Dropdown]
- LMS Extract File Type: XML V1.1 (req to authenticate) [Dropdown]
- LMS Extract Group ID: USBNY-WRT-102-SEC01 [Text Field]
- LMS URL: [Text Field]

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Previous in List', and 'Next in List'.

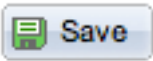
Extract File Type field.

Click the **Textbook** tab.

Instructors are required to submit all of the required and suggested course materials to the **Provost Liaison**, who then enters the information on this page.

The screenshot displays a course management system interface. At the top, there is a navigation bar with tabs: Basic Data, Meetings, Enrollment Cntrl, Reserve Cap, Notes, LMS Data, and **Textbook** (highlighted with a red box). Below the navigation bar, course details are shown: Course ID: 201020, Academic Institution: SUNY at Stony Brook, Term: Fall 2011, Subject Area: WRT, Catalog Nbr: 102, Course Offering Nbr: 3, Undergrad, Writing, and Intermed Writing Workshop A. The Class Sections section shows Session: A, Class Section: 01, Component: Lecture, Full Fall Semester Session, Class Nbr: 80254, and Event ID. The Textbook Assignment section has a status of Pending (selected) and an option for Textbook entry complete. A checkbox for 'No textbooks assigned to class' is present, along with a 'Copy Textbooks' button. Below this is a table for Course Materials with columns for Seq No, Course Material Type, Course Material Status, Title, ISBN, and Author. The table contains one row with the number '1' in the Seq No column. A Special Instructions section is also visible. At the bottom, there are buttons for Save, Return to Search, Previous in List, and Next in List.

Seq No	Course Material Type	Course Material Status	Title	ISBN	Author
1					



Once you have entered all of the information for this new course section click the Save button.



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

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

To check to see if Pre-requisite screening is turned on or off for each section of this course, go to the **Adjust Class Associations** page (Main Menu > Curriculum Management > Schedule of Classes > Adjust Class Associations).

12. Pre-Requisite Screening

Some departments use pre-requisite screening to ensure that only students with proper academic credentials are able to enroll in courses.

Requests for pre-requisite screening must go to the contact in your School or College. This must be setup before enrollment begins.

Use the **Adjust Class Associations** page to view the pre-requisites for a course and to see whether pre-requisite screening is being used or not.

Navigation:

Curriculum Management > Schedule of Classes > Adjust Class Associations

Adjust Class Associations
Enter any information you have and click Search. Leave fields blank for a list of all results.

Find an Existing Value

Academic Institution: [=] USBNY [Q]
Term: [=] 1088 [Q]
Subject Area: [=] CHE [Q]
Catalog Nbr: [begins with] 133
Academic Career: [=] [v]
Session: [=] [v]
Course ID: [begins with] [Q]
Course Offering Nbr: [=] [Q]
Description: [begins with] [Q]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the **Term**

Enter the **Subject Area**

Enter the **Catalog Number**

Click **Search**

Class Requisites

Course ID: 200683 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Fall 2008 Undergrad
Subject Area: CHE Chemistry
Catalog Nbr: 133 General Chemistry Lab I
Session: A Full Fall Semester Session

Catalog Requisite

Requirement Group: 001170 [Detail] pq CHE 133
Long Description: Pre- or Corequisite: CHE 123 or 129 or CHE 131 or 198

Class Association Requisites Find | View All First 1 of 53 Last

Associated Class: 11 Also Use Catalog Requisite
Requirement Group: [Detail]
Long Description:

Save Return to Search

Pre-requisite screening is being used if this box is checked.

13. Copy Research Department Class Instructors

This process takes the instructors assigned to each section of one tutorial course (also known as the designated master class – Subject and Catalog #) and copies the instructors' information to the same section #s of all other tutorial courses offered by the department.

Tutorials sections include internships, tutorial, research sections, etc. In PeopleSoft, Tutorials sections should be designated as **T01, T02**.

Example:

If the Master Class = MAT 699

The faculty information and access will be copied as follows:

From MAT 699 Section **T01**, to MAT 487 **T01**, to MAT 475 **T01**

From MAT 699 Section **T02**, to MAT 487 **T02**, to MAT 487 **T02**

This process also validates the Instructor/Advisor Table. It provides you with an Exception Report which helps you in identifying an instructor that is not available/active on the Instructor/Advisor Table.

Instructor/Advisor Table Approved Courses

Marcelle Smith ID: 100098437

Instructor Details view All First 1 of 1 Last

*Effective Date: 03/20/2007 *Status: Inactive

*Instructor Type: USBNY SUNY at Stony Brook

*Academic Institution: USBNY SUNY at Stony Brook

*Primary Acad Org: SUNY at Stony Brook

*Instructor Available: Sabbatical

Instructor/Advisor Role View All First 1 of 1 Last

Advisor Number: 1 Percent of Appointment: 0

*Academic Career: Academic Program: Academic Plan: Academic Sub-Plan:

SU Copy Dept Class Instr

First, make sure that your Master class is set up correctly in the PeopleSoft Schedule of Classes because the information from this class will be copied to the other tutorial sections.

Navigation:

SBU > SBU Student Records > Report > SU Copy Dept Class Instr

SU Copy Dept Class Instr

Enter any information you have and click Search. Leave fields blank for

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

[View All](#) [First](#) [1-3 of 3](#) [Last](#)

Run Control ID	Language Code
PSREPORTS	English
SCHEDULING	English
pssoftreports	English

Click Search and select the PSREPORTS **Run Control ID**.

If you do not have one, click **Add a New Value** to create a Run Control ID.

Enter the Report parameters:

Run Control ID: Copy_Instr_Rsrch [Report Manager](#) [Process Monitor](#) **Run**

Copy Department Class Instructors

Institution: USBNY SUNY at Stony Brook

*Term: 1074 Spring 2007

*Acad Org: MATHEMATIC Mathematics

*Master Subject: MAT *Master Catalog Nbr: 699

Crse Description: Dissertation Resrch on Campus

Run Options

Reports Only

Update & Reports

Enter the Term, Acad Org., your Master Subject, and Master Catalog #.

Select Reports Only.

Click the **Run** button at the top of the page.

Save Add Update/Display

Reports Only will create the appropriate reports for viewing in Excel and will NOT update anything in the class schedule. You should select this Report Option first. After you have cleaned up the errors and entered all of the correct and appropriate information to your schedule, you can run the process using the MASTER File you updated.

Run the Process:

Go back to the **SU Copy Dept Class Instr** page.

This time under **Report Options** select **Update & Reports**.

Click **Run**.

This will run the process to update all of the active TUTORIAL SECTIONS in your Department and will create the appropriate reports for viewing in Excel.

Run Control ID: Copy_Instr_Rsrch

[Report Manager](#) [Process Monitor](#) [Run](#)

Copy Department Class Instructors

Institution: USBNY SUNY at Stony Brook

*Term: 1074 Spring 2007

*Acad Org: MATHEMATIC Mathematics

*Master Subject: MAT *Master Catalog Nbr: 699

Crse Description: Dissertation Resrch on Campus

Run Options

- Reports Only
- Update & Reports

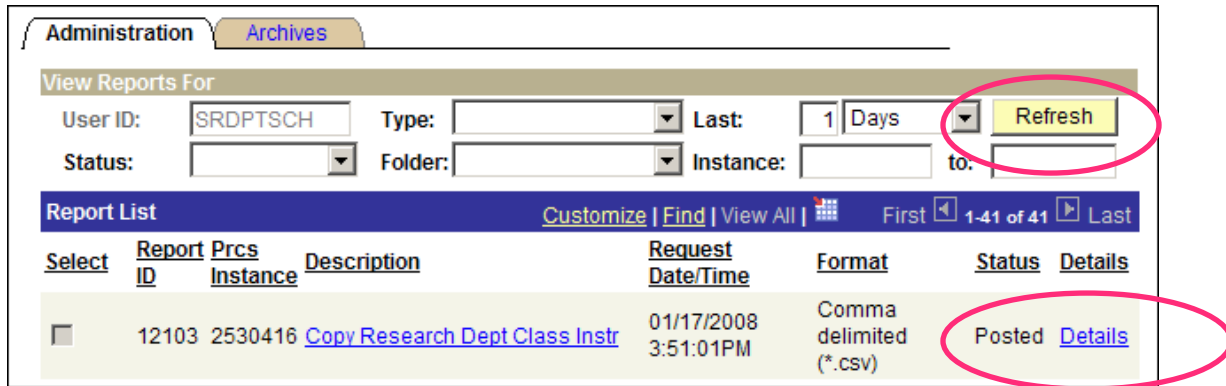
Save Add Update/Display

View Your Reports:

Click the **Report Manager** link.

This will bring you to the **Report List** page.

Click **Refresh** until you see **Posted** in the Status column, and then click the **Details** link.



The screenshot shows the 'Report Manager' interface. At the top, there are tabs for 'Administration' and 'Archives'. Below this is a 'View Reports For' section with several filters: 'User ID' (SRDPTSCH), 'Type' (dropdown), 'Last' (1 Days), 'Status' (dropdown), 'Folder' (dropdown), 'Instance' (input), and 'to:' (input). A yellow 'Refresh' button is circled in red. Below the filters is a 'Report List' table with columns: 'Select', 'Report ID', 'Prs Instance', 'Description', 'Request Date/Time', 'Format', 'Status', and 'Details'. The table contains one row with the following data: '12103', '2530416', 'Copy Research Dept Class Instr', '01/17/2008 3:51:01PM', 'Comma delimited (*.csv)', 'Posted', and 'Details'. The 'Posted' status and the 'Details' link are circled in red.

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	12103	2530416	Copy Research Dept Class Instr	01/17/2008 3:51:01PM	Comma delimited (*.csv)	Posted	Details

This will take you to the **Report Detail** page. You will see two **.csv** files. Click each one and save them. Then open them with Excel.

Report Detail

Report

Report ID: 12103 Process Instance: 2530416 [Message Log](#)
Name: SUSR8367 Process Type: SQR Process
Run Status: Success

Copy Research Dept Class Instr

Distribution Details

Distribution Node: psnsrepos1 Expiration Date: 01/24/2008

File List

Name	File Size (bytes)	Datetime Created
Assignments_2530416.CSV	21,714	01/17/2008 3:51:41.000000PM EST
Exceptions_2530416.CSV	4,649	01/17/2008 3:51:41.000000PM EST
SQR - SUSR8367 - 2530416.log	1,720	01/17/2008 3:51:41.000000PM EST
susr8367_2530416.out	1,979	01/17/2008 3:51:41.000000PM EST

Distribute To

Distribution ID Type	*Distribution ID
User	SRDPTSCH

OK Cancel

Click
OK
to

return to the Report Manager.

The **Assignment** Report will provide information on the classes which were (or will be) updated with the instructor information. It will also provide information when the instructor does not have an active/available status on the **Instructor/Advisor Table**.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	3/20/2007							Reports Only					Assignment Report		
2	SUBJ	CAT#	STRM	SESS	SECT	MTG#	SEQ	CURRENTLY ASSIGNED	EMPLID	ROLE	AVAIL	GRD RSTR ACCESS	CRSE ID	CRSE OFFER#	COMMENTS
3	MAT	475	1074	B	T01		1	1		PI		A	203734	2	Will Be Assigned
4	MAT	475	1074	B	T02		1	1		PI		A	203734	2	Will Be Assigned
5	MAT	487	1074	B	T01		1	1		PI		A	203728	4	Will Be Assigned
6	MAT	487	1074	B	T02		1	1		PI		A	203728	4	Will Be Assigned
7	MAT	487	1074	B	T04		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
8	MAT	487	1074	B	T05		1	1		PI		A	203728	4	Will Be Assigned
9	MAT	487	1074	B	T06		1	1		PI		A	203728	4	Will Be Assigned
10	MAT	487	1074	B	T07		1	1		PI		A	203728	4	Will Be Assigned
11	MAT	487	1074	B	T08		1	1		PI		A	203728	4	Will Be Assigned
12	MAT	487	1074	B	T09		1	1		PI		A	203728	4	Will Be Assigned
13	MAT	487	1074	B	T10		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
14	MAT	487	1074	B	T11		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
15	MAT	487	1074	B	T12		1	1		PI		A	203728	4	Will Be Assigned
16	MAT	487	1074	B	T14		1	1		PI		A	203728	4	Will Be Assigned
17	MAT	487	1074	B	T15		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
18	MAT	487	1074	B	T16		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
19	MAT	487	1074	B	T17		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
20	MAT	487	1074	B	T18		1	1		PI	Sabbatical	A	203728	4	Will Be Assigned
21	MAT	487	1074	B	T19		1	1		PI		A	203728	4	Will Be Assigned
22	MAT	487	1074	B	T20		1	1		PI		A	203728	4	Will Be Assigned
23	MAT	487	1074	B	T20		1	2		ADM		A	203728	4	Will Be Assigned
24	MAT	487	1074	B	T21		1	1		PI		A	203728	4	Will Be Assigned
25	MAT	487	1074	B	T22		1	1		PI		A	203728	4	Will Be Assigned

The

Exceptions Report will provide information on the classes which were not (will not be) updated with the instructor information and you'll find the reason in the Comments.

	A	B	C	D	E	F	G	H	I	J	
1	3/20/2007							Reports Only		Exception Report	
2	SUBJ	CAT#	STRM	SESS	SECT	MTG#	SEQ	CRSE ID	CRSE OFFER#	COMMENTS	
3	MAT	487	1074	B	T03		1	1	203728	4	Section Not On Master
4	MAT	495	1074	B	T13		1	1	203618	1	Section Not On Master
5	MAT	698	1074	B	T01		1	2	304561	2	Section Not On Master
6	MAT	698	1074	B	T03		1	1	304561	2	Section Not On Master
7	MAT	698	1074	B	T04		1	2	304561	2	Section Not On Master
8	MAT	698	1074	B	T16		1	2	304561	2	Section Not On Master
9	MAT	698	1074	B	T33		1	1	304561	2	Section Not On Master
10	MAT	475	1074	B	T04		1	1		0	Master Section Not On Target
11	MAT	475	1074	B	T05		1	1		0	Master Section Not On Target
12	MAT	475	1074	B	T06		1	1		0	Master Section Not On Target
13	MAT	475	1074	B	T07		1	1		0	Master Section Not On Target
14	MAT	475	1074	B	T08		1	1		0	Master Section Not On Target
15	MAT	475	1074	B	T09		1	1		0	Master Section Not On Target
16	MAT	475	1074	B	T10		1	1		0	Master Section Not On Target
17	MAT	475	1074	B	T11		1	1		0	Master Section Not On Target
18	MAT	475	1074	B	T12		1	1		0	Master Section Not On Target
19	MAT	475	1074	B	T14		1	1		0	Master Section Not On Target
20	MAT	475	1074	B	T15		1	1		0	Master Section Not On Target
21	MAT	475	1074	B	T16		1	1		0	Master Section Not On Target
22	MAT	475	1074	B	T17		1	1		0	Master Section Not On Target
23	MAT	475	1074	B	T18		1	1		0	Master Section Not On Target
24	MAT	475	1074	B	T19		1	1		0	Master Section Not On Target
25	MAT	475	1074	B	T20		1	1		0	Master Section Not On Target

14. Manage Auto-Enroll Sections, Enrollment and Waitlist Capacity

Navigation:

Main Menu > Curriculum Management > Schedule of Classes > Update Sections of a Class

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

You will complete your scheduling for the **auto-enroll** courses here.

In the Assoc column for all of the Lecture sections, make sure that you have entered **9999**.

In the **Auto Enrl 1** column for the Lab/Recitation sections, enter the section number of the Lecture that students will auto-enroll into when they register for each.

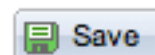
Update Sections of a Class

Course ID: 200679 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Fall 2011 Undergrad
Subject Area: CHE Chemistry
Catalog Nbr: 131 General Chemistry IB

Class Sections Customize | Filter | View All

Class Status Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Ac
Fall	01	82055	Lecture	Open	N	A	9999				N
Fall	02	82077	Lecture	Open	N	A	9999				N
Fall	03	90609	Lecture	Closed	N	S	9999				N
Fall	04	91262	Lecture	Closed	N	S	9999				N
Fall	R01	81901	Recitation	Open	E	A	1	01			N
Fall	R02	81902	Recitation	Open	E	A	2	01			N
Fall	R03	81903	Recitation	Open	E	A	3	01			N
Fall	R04	81904	Recitation	Open	E	A	4	01			N



Click the

SAVE button to save the information that you entered.

Click the **Class Enrollment Limits** tab.

Use this page to edit **Enrollment Capacity** and **Waitlist Capacity** for existing classes.

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

Update Sections of a Class

Course ID: 200679 Course Offering Nbr: 2
Academic Institution: SUNY at Stony Brook
Term: Fall 2011 Undergrad
Subject Area: CHE Chemistry
Catalog Nbr: 131 General Chemistry IB

Class Sections: **Class Enrollment Limits** | Customize | Filter | View All | First | 1-8

Session	Section	Class Nbr	Component	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot
Fall	01	82055	Lecture	570		160	
Fall	02	82077	Lecture	570		160	
Fall	03	90609	Lecture	0			
Fall	04	91262	Lecture	0			
Fall	R01	81901	Recitation	38		10	
Fall	R02	81902	Recitation	38		10	
Fall	R03	81903	Recitation	38		10	
Fall	R04	81904	Recitation	38		10	

Save Return to Search

Save

Click the

SAVE button to save the information that you entered.

15. Department Class Validation Report

The Department Class Validation report generates a list of errors that exist in the *Schedule of Classes*. Department Schedulers should use this report to ensure that the information that they entered in the *Schedule of Classes* is accurate. This is especially important for CASA reporting.

Navigation:

SBU → SBU Student Records → Report → SU Dept Class Validation

The screenshot shows the 'SU Dept Class Validation' web page. At the top, there is a search section titled 'Find an Existing Value'. It includes a text input field for 'Run Control ID:', a 'Case Sensitive' checkbox, and three buttons: 'Search', 'Clear', and 'Basic Search'. Below this is a link for 'Add a New Value'. The 'Search Results' section shows a table with two columns: 'Run Control ID' and 'Language Code'. The first row of results is highlighted in blue and shows 'psreports' under 'Run Control ID' and 'English' under 'Language Code'. There are also navigation links like 'View All', 'First', '1-2 of 2', and 'Last'.

Click the **Search** button to display a list of your existing *Run Control IDs*.

Click the **psreports** *Run Control ID* (or any *Run Control ID* that you usually use for your Rosters or Scheduling Reports).

Note: If you do not have any *Run Control IDs* listed then you will have to click **Add a New Value** and add a new *Run Control ID*. You can name it *psreports*.

PeopleSoft.

Home Help

Home > SBU > SBU Student Records > Report > SU Dept Class Validation [New Window](#)

SU Dept Class Validation

Run Control ID: psreports [Report Manager](#) [Process Monitor](#) [Run](#)

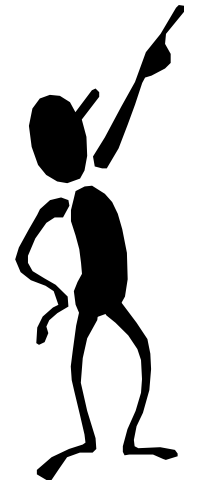
*Academic Institution: SUNY at Stony Brook

*Term: Spring 2005

Subject Area:

Academic Group:

[Save](#) [Return to Search](#) [Add](#) [Update/Display](#)



You also have the option of generating a report for all classes by **Academic Group** (i.e., School of Nursing, SPD, etc.). Instead of entering the Subject Area, click the **Lookup button** next to the Academic Group field, click the **Lookup button** on the next page and select your **Academic Group**. **You cannot enter both Subject Area and Academic Group. It has to be one or the other.**

This will take you to the *Report List* page.

Administration Archives

Refresh SRDPTSCH Type: Last: 1 Days Refresh

Status: Folder: Instance: to:

Report List Customize | Find | View All | First 1 of 1 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	11909	2530200	Dept Class Validation	01/16/2008 4:11:57PM	Comma delimited (*.csv)	Posted	Details

Select All Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to SU Dept Class Validation](#)

Click the

Refresh button until you see *Posted* in the **Status** column next to the report.

Then, click the **Details** link.

This will take you to the *ReportDetail* page.

Report Detail

Report

Report ID: 11909 Process Instance: 2530200 [Message Log](#)

Name: SUSR8115 Process Type: SQR Report

Run Status: Success

Dept Class Validation

Distribution Details

Distribution Node: pnsrepos1 Expiration Date: 01/23/2008

File List

Name	File Size (bytes)	Datetime Created
SQR_SUSR8115_2530200.log	1,720	01/16/2008 4:12:30.000000PM EST
Val_Cls_Sched.csv	3,328	01/16/2008 4:12:30.000000PM EST
SUSR8115_2530200.out	1,313	01/16/2008 4:12:30.000000PM EST

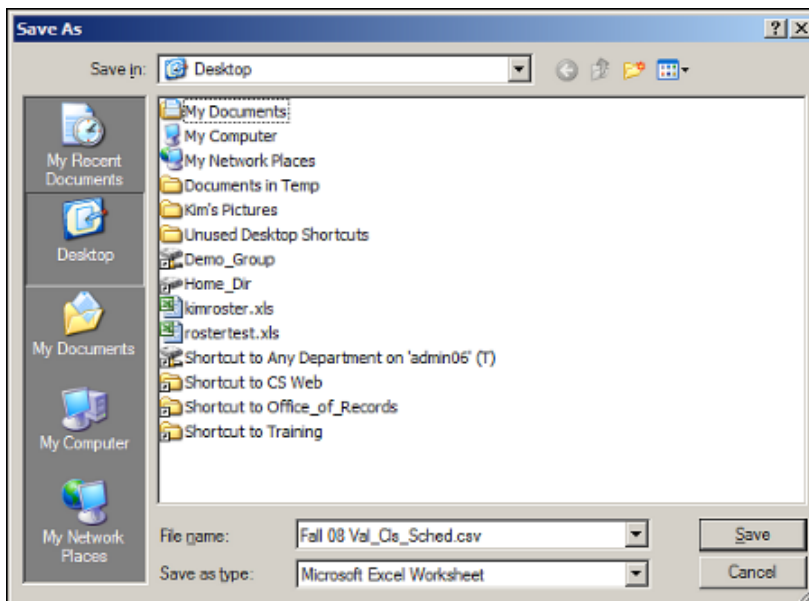
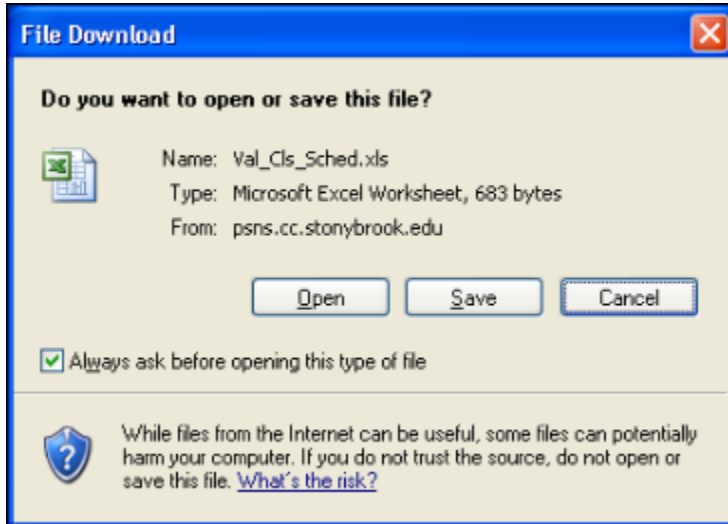
Distribute To

Distribution ID Type	*Distribution ID
User	SRDPTSCH

OK Cancel

Click the **.csv** file to open it

Click **Save**



Select where you want to save the file

Enter a file name and **change the extension to .csv**

Click **Save**

Open the file in Excel and then re-save it a Microsoft Excel workbook (in the Save as Type field).

Use this spreadsheet to clean up your errors in PeopleSoft.

You can rerun this process to make sure your errors have been fixed.

List of Error Messages

Below is a list of error messages you may see in your report. For a more detailed description of each error message and for information on how to correct them, please refer to the **Dept Class Validation Error Messages** document.

Code	Code Description
CL01	Missing Class Association
CL02	Single Course Component
CL03	Single Class Component
CL04	Missing Course
CL05	Missing Course Component
CL06	Missing Class Component
CL07	Invalid Graded Component
CL08	Invalid Graded Comp - Crse Cat
CL09	Multi-Unique-Component
CL10	Associated Class 9999
CL11	Invalid Auto Enroll Section
CL12	Missing Section Combined
CL13	Invalid Class Section Name
CL14	Non-Unique Class Number
CL15	Missing Course Topic
CL16	Non Enrol Section Not Referred
CL17	Invalid Class Start/End Times
CL18	Meeting Pattern Extra Spaces
CL19	Missing Meeting Pattern
CL20	Invalid Meeting Pattern
CL21	Invalid Instructor
CL22	Class Assoc - Invalid Units
CL23	Non Enrol Not Referred (Any)
CL24	Class Active - EnrlCap Zero
CL25	Cls Assoc 9999 - No Class Comp
CL26	Class - Course Not Active
CL27	Class - Schedule Print Off
CL28	Class Instr Grade Rstr Access
CL29	Class Instr Invalid Role
CL30	Missing Course Offering
CL31	Course Offer Changed
CL32	Course Offer Missing Course
CL33	Class - Section Combnd No Cap
CL34	Class Assoc-Grade Basis Invld
CL35	Grade Rstr Access Appr Not = 1

CL36 Grade Rstr Incorrect TA Access
CL37 Grade Rstr Access PI: REC LAB
CL38 Grade Rstr Access TA: TUT CLIN
CL39 Grade Rstr SUP ADMIN Print CHK
CL40 Grade Rstr Access Instr Blank
CL41 Combined Class Inactive Status
CL44 Auto-Enrl E not reprd to 9999
CL45 RD Catalog/Assoc Mismatch
CL46 Class Instr Enrollment > 0

16. Dept Class Validation Report Error Messages

The Class Validation Report is one of the most important tools to use in reviewing and correcting any information pertaining to the schedule. Many of these error messages have to be corrected prior to registration and are essential to the schedule's accuracy. It is extremely important to review this report after every rollover to ensure all information for the new semester is up-to-date and accurate.

Many, if not all, of the error messages that you will encounter may be fixed under the *Schedule of Classes* Screen. It is at this screen where you will update and/or correct any information pertaining to the schedule. Please keep in mind that a "Rollover" is done every semester and everything, including active, inactive, and cancelled courses, is rolled over. Therefore, it is essential that after the class validation report has been run, a "clean-up" of data takes place to reflect changes to the new semester. Equally as important is accurate entry of class-schedule data. The CASA Report is directly affected by this data, and for this reason, accuracy is imperative.

Searching for a class:

Navigation: [Curriculum Management > Schedule of Classes > Maintain Schedule of Classes](#)

- 1) Enter USBNY in the Academic Institution Field
- 2) Enter the term code
- 3) Enter the Subject Area
- 4) Enter the Catalog Number

Note: If you're not sure what to enter for the term code or the subject area, you can always conduct a search by clicking on the magnifying glass next to the field.

- › Campus Community
- › Student Recruiting
- › Student Admissions
- › Records and Enrollment
- › Curriculum Management
 - › Course Catalog
 - ▼ Schedule of Classes
 - [Class Search](#)
 - [Schedule New Course](#)
 - **Maintain Schedule of Classes**
 - [Schedule Class Meetings](#)
 - [Adjust Class Associations](#)
 - [Update Sections of a Class](#)
 - [Class Event Table](#)
 - [Exam Code Table](#)
 - [Generate Exam Schedule](#)
 - [Class Notes Table](#)
 - [Global Notes Table](#)
 - [Resource Queue Cleanup](#)
 - [Review Message Log](#)

- › Roll Curriculum Data Forward
- › Enrollment Requirements

Maintain Schedule of Classes

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

Find an Existing Value

Academic Institution: = ←

Term: = ←

Subject Area: = ←

Catalog Nbr:

Academic Career: =

Campus:

Description:

Course ID:

Course Offering Nbr: =

Case Sensitive

[Basic Search](#)

Specific Error Messages:

Error Message: CL 01 - Missing Class Association

Error Specifications: The class does not have an entry for the Associated Class Field. Every class must always have an associated class # corresponding to the class section #. For ex. if the Class Section # is 05, then the Associated Class must be 5.

Correction: Input an associated class # which corresponds to the class section #. In this example, the Class Section is 01 so the entry for the Associated Class should be 1.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

Course ID:	305809	Course Offering Nbr:	1
Academic Institution:	SUNY at Stony Brook	Term:	Spring 2008
Subject Area:	BUS	Undergrad:	Business Management
Catalog Nbr:	111	Intro to Bus for Non-Bus Maj:	

*Session:	B	Full Spring Semester Session		Class Nbr:	57467
*Class Section:	01	*Start/End Date:	01/28/2008 to 05/20/2008	*Component:	LEC - Lecture
*Component:	LEC - Lecture	Event ID:	000078501	*Class Type:	Enrollment
*Class Type:	Enrollment	*Associated Class:	1	*Campus:	WEST
*Associated Class:	1	*Location:	WESTCAMPU - West Campus	Course Administrator:	
*Campus:	WEST	*Academic Organization:	BUSINESS - College of Business	Academic Group:	HARR - College of Business
*Location:	WESTCAMPU - West Campus	*Holiday Schedule:	SEM - Academic Holidays	*Instruction Mode:	P - In Person
Course Administrator:		*Instruction Mode:	P - In Person	Primary Instr Section:	01
*Academic Organization:	BUSINESS - College of Business				
Academic Group:	HARR - College of Business				
*Holiday Schedule:	SEM - Academic Holidays				
*Instruction Mode:	P - In Person				
Primary Instr Section:	01				

CL11 – Invalid Auto Enroll Section

Error Specifications: A class has an invalid entry for the auto enrollment #. This will prevent the student from successfully auto enrolling into both components of the course. While you can view this information under the *Schedule of Classes* Screen, the *Class Sections* Screen is a much simpler way to view this information.

Correction: Correct the entry in the Auto Enrl Box to the exact section # of the non-enrollment class. On the example below, please note the Section # for the non-enrollment class (D91). In this example, 91 should be corrected to D91.

Navigation: [Curriculum Management](#)>[Schedule of Classes](#)>[Update Sections of a Class](#)

Records and Enrollment		Course ID: 303652		Course Offering Nbr: 1	
Curriculum Management		Academic Institution: SUNY at Stony Brook		Term: Spring 2007	
Course Catalog		Subject Area: HNG		Graduate	
Schedule of Classes		Catalog Nbr: 572		Nursing MS & Post Master	
- Class Search				Adv Thry Cln Prc Family Hlt I	
- Schedule New Course					
- Maintain Schedule of Classes					
- Schedule Class Meetings					
- Adjust Class Associations					
- Update Sections of a Class					
- Class Event Table					
- Exam Code Table					
- Generate Exam Schedule					
- Class Notes Table					
- Global Notes Table					
- Resource Queue Cleanup					
- Review Message Log					
Roll Curriculum Data Forward					
Enrollment Requirements					
Combined Sections					
Dynamic Dates					

Class Sections												
Customize Find View All First 1-8 of 14												
Class Status Class Enrollment Limits												
Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Consent	
Spring	D13	55079	Lecture	Open	N	A	9999				N	
Spring	D19	55080	Lecture	Open	N	A	9999				N	
Spring	D47	55081	Lecture	Open	N	S	9999				N	
Spring	D6	55076	Lecture	Closed	N	S	9999				N	
Spring	D7	55077	Lecture	Closed	N	S	9999				N	
Spring	D91	55078	Lecture	Open	N	S	9999				N	
Spring	D95	54919	Lecture	Closed	N	S	9999				N	
Spring	DC13	55085	Clinical	Open	E	A	13	13			N	

As you can see below Class# 55084 does not have a valid entry for its auto-enrollment class. The auto enrollment entry must match with the section # of the non-enrollment course. As shown above the section # is D91 rather than 91.

Records and Enrollment		Course ID: 303652		Course Offering Nbr: 1	
Curriculum Management		Academic Institution: SUNY at Stony Brook		Term: Spring 2007	
Course Catalog		Subject Area: HNG		Graduate	
Schedule of Classes		Catalog Nbr: 572		Nursing MS & Post Master	
- Class Search				Adv Thry Cln Prc Family Hlt I	
- Schedule New Course					
- Maintain Schedule of Classes					
- Schedule Class Meetings					
- Adjust Class Associations					
- Update Sections of a Class					
- Class Event Table					
- Exam Code Table					
- Generate Exam Schedule					
- Class Notes Table					
- Global Notes Table					
- Resource Queue Cleanup					
- Review Message Log					
Roll Curriculum Data Forward					
Enrollment Requirements					

Class Sections												
Customize Find View All First 6-13 of 14												
Class Status Class Enrollment Limits												
Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Conse	
Spring	D91	55078	Lecture	Open	N	S	9999				N	
Spring	D95	54919	Lecture	Closed	N	S	9999				N	
Spring	DC13	55085	Clinical	Open	E	A	13	D13			N	
Spring	DC19	55086	Clinical	Open	E	A	19	D19			N	
Spring	DC47	55087	Clinical	Open	E	S	47	D47			N	
Spring	DC6	55082	Clinical	Closed	E	S	6	D6			N	
Spring	DC7	55083	Clinical	Closed	E	S	7	D7			N	
Spring	DC91	55084	Clinical	Open	E	S	91	91			N	

CL12 – Missing Section Combined

Error Specifications: Since this error is primarily connected to the *Combined Sections* Screen, you must contact the Registrar's Office for correction.

CL13 – Invalid Class Section Name

Error Specifications: The class has an invalid entry for the class section field. This error identifies sections where the class section title does not match the section's component (recitation, lab, etc) type. For ex. if the class is a recitation, the class section must be labeled as a recitation (R##.) The following are the different types of components you will encounter with their corresponding class section name abbreviations:

Seminar = S01, S02
Tutorial = T01, T02
Online = 30, 31

Lab = L01, L02
Recitation = R01, R02
Clinical = C01, C02

Lecture = 01, 02
Supervised = V01, V02
Manhattan = 60, 61

Correction: Input a valid entry for the Class Section Field. For this example, we corrected the Class Section entry to L11 to reflect the Lab Class Component. Also, please note that it is very important to make sure that the Primary Instr Section Number coincides with the Class Section Number.

Navigation: [Curriculum Management > Schedule of Classes > Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The left sidebar contains a navigation tree with 'Maintain Schedule of Classes' selected. The main content area is divided into several sections:

- Basic Data:** Course ID: 200684, Academic Institution: SUNY at Stony Brook, Term: Spring 2008, Subject Area: CHE, Catalog Nbr: 134, Course Offering Nbr: 2, Undergrad, Chemistry, General Chemistry Lab II.
- Class Sections:** A table with columns for *Session, *Class Section, *Component, *Class Type, *Associated Class, *Campus, *Location, Course Administrator, *Academic Organization, Academic Group, *Holiday Schedule, *Instruction Mode, and Primary Instr Section. The 'Class Section' and 'Primary Instr Section' fields are highlighted with blue arrows and contain the value 'L11'.
- Other Fields:** *Start/End Date: 01/28/2008 to 05/20/2008, Event ID, Add Fee button, and checkboxes for Schedule Print, Student Specific Permissions, Dynamic Date Calc Required, Generate Class Mtg Attendance, Sync Attendance with Class, and GL Interface Required.

CL15 – Missing Course Topic

Error Specifications: The course topic has not been entered for the class. If a course topic has been specified in Course Catalog, the class must also reflect this information.

Correction: Input a Course Topic ID for the class.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

Please note that you should NOT enter topics under the “Meetings” Page. If you do, the topic will NOT appear either on SOLAR or on the student’s transcript.

The screenshot displays the 'Maintain Schedule of Classes' interface. The left sidebar contains a navigation menu with the following items: Student Admissions, Records and Enrollment, Curriculum Management, Course Catalog, Schedule of Classes (with sub-items: Class Search, Schedule New Course, Maintain Schedule of Classes, Schedule Class Meetings, Adjust Class Associations, Update Sections of a Class, Class Event Table, Exam Code Table, Generate Exam Schedule, Class Notes Table, Global Notes Table, Resource Queue Cleanup, Review Message Log), Roll Curriculum Data Forward, Enrollment Requirements, Combined Sections, and Dynamic Dates. A blue arrow points to the 'Enrollment Requirements' item.

The main content area shows details for 'General Chemistry Lab II' (Catalog Nbr: 134). The 'Class Sections' section includes fields for Session (B), Class Section (L11), Component (LAB - Laboratory), Class Type (Enrollment), Associated Class (11), Campus (WEST), Location (WESTCAMPUS - West Campus), Course Administrator, Academic Organization (CHEMISTRY - Chemistry), Academic Group (CAS - College of Arts and Sciences), Holiday Schedule (SEM - Academic Holidays), Instruction Mode (P - In Person), and Primary Instr Section (L11). There is an 'Add Fee' button and several checkboxes: Schedule Print, Student Specific Permissions, Dynamic Date Calc Required, Generate Class Mtg Attendance, Sync Attendance with Class Mtg, and GL Interface Required.

The 'Class Topic' section contains a 'Course Topic ID' field with a search icon and a 'Print Topic in Schedule' checkbox. Below this is the 'Equivalent Course Group' section.

CL16 – Non Enroll Section Not Referred

Error Specifications: A multi-component class does not have an entry under the auto-enroll section. This will prevent the student from successfully auto enrolling into both components of the class.

Correction: Input a valid entry under the Auto Enrl 1 Box. In this example, 01, which is the section for the non-enrollment component should be inputted.

Navigation: [Curriculum Management](#)>[Schedule of Classes](#)>[Update Sections of a Class](#)

- ▷ Records and Enrollment
- ▷ Curriculum Management
 - ▷ Course Catalog
 - ▽ Schedule of Classes
 - [Class Search](#)
 - [Schedule New Course](#)
 - [Maintain Schedule of Classes](#)
 - [Schedule Class Meetings](#)
 - [Adjust Class Associations](#)
 - [Update Sections of a Class](#)
 - [Class Event Table](#)
 - [Exam Code Table](#)
 - [Generate Exam Schedule](#)
 - [Class Notes Table](#)
 - [Global Notes Table](#)
 - [Resource Queue Cleanup](#)
 - [Review Message Log](#)
 - ▷ Roll Curriculum Data Forward
 - ▷ Enrollment Requirements
 - ▷ Combined Sections

Course ID: 200684 Course Offering Nbr: 2
 Academic Institution: SUNY at Stony Brook
 Term: Spring 2008 Undergrad
 Subject Area: CHE Chemistry
 Catalog Nbr: 134 General Chemistry Lab II

Class Sections Customize | Find | View All | First 1-8 of 40

Class Status **Class Enrollment Limits**

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Conse
Spring	01	41787	Lecture	Open	N	A	9999				D
Spring	02	41786	Lecture	Open	N	A	9999				D
Spring	03	41789	Lecture	Closed	N	T	9999				N
Spring	04	41788	Lecture	Open	N	S	9999				N
Spring	05	41790	Lecture	Open	N	S	9999				N
Spring	06	42272	Lecture	Open	N	S	9999				N
Spring	L11	41792	Laboratory	Open	E	A	11				D
Spring	L12	46838	Laboratory	Open	E	A	12	02		L13	D

CL17 – Invalid Class Start/End Times

Error Specifications: The entries for the start and/or end times of the class are not valid. For example, this may mean that the class was incorrectly scheduled for 1:00 AM rather than 1:00 PM.

Correction: Correct the entries for the start and/or end times of the class.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The left sidebar contains a navigation menu with options like 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', and 'Schedule of Classes'. The main content area is divided into several sections: 'Basic Data', 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', and 'LMS Data'. The 'Basic Data' section shows course information: Course ID: 200684, Academic Institution: SUNY at Stony Brook, Term: Spring 2008, Subject Area: CHE, Catalog Nbr: 134, Course Offering Nbr: 2, Undergrad, Chemistry, General Chemistry Lab II. The 'Class Sections' section shows Session: B, Class Section: L21, Component: Laboratory, Full Spring Semester Session, Class Nbr: 41791, Event ID. The 'Meeting Pattern' section shows a table with columns: Facility ID, Capacity, Pat, Mtg Start, Mtg End, M, T, W, T, F, S, S, *Start/End Date. A blue arrow points to the 'Mtg Start' field, which contains '3:50AM'. Below this, the 'Instructors For Meeting Pattern' section shows a table with columns: ID, Name, *Instructor Role, Print, Access, Contact. The first row shows ID 100033500, Name Schneider, Robert F., and Role Supervi.

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL19 – Missing Meeting Pattern

Error Specifications: There are no entries for the meeting patterns of the class. This field MUST be populated. If not, it will NOT print correctly in MSReview or in SOLAR.

Correction: Simply input the meeting times for the class. At times, these fields are often left blank because the class might not have a specific meeting time. As a result, there are few meeting patterns which can be used for such cases. These meeting patterns are HTBA (Hours to be Arranged), APPT (Appointment), and FLEX (Flexible Meeting.)

Navigation: [Curriculum Management > Schedule of Classes > Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The 'Meetings' tab is selected, showing the following information:

- Course ID: 200684
- Academic Institution: SUNY at Stony Brook
- Term: Spring 2008
- Subject Area: CHE
- Catalog Nbr: 134
- Course Offering Nbr: 2
- Undergrad
- Chemistry
- General Chemistry Lab II
- INSTR_ORG_VW

The 'Class Sections' section shows:

- Session: B
- Class Section: L21
- Component: Laboratory
- Full Spring Semester Session
- Class Nbr: 41791
- Event ID:

The 'Meeting Pattern' section includes a table with columns for Facility ID, Capacity, Pat, Mtg Start, Mtg End, and days of the week (M, T, W, T, F, S, S). The *Start/End Date is set from 01/28/2008 to 05/20/2008. There are also fields for Topic ID, Free Format Topic, and a checkbox for 'Print Topic On Transcript'. A blue double-headed arrow points to the 'Meeting Pattern' section.

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL20 – Invalid Meeting Pattern

Error Specifications: The meeting pattern entered into the class schedule is not included in the standard meeting patterns. This error may have been caused by a manual entry of a non-standard meeting pattern or by an inactive meeting pattern having rolled over from previous semesters.

Correction: Enter a valid meeting pattern by choosing one of the available meeting patterns from the dropdown menu.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	T	F	S	S	*Start/End Date
S002000169	24	M	3:50PM	6:50PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01/28/2008 05/20/2008

Standard Meeting Pattern	Description
APPT	Appointment
F	Friday (Spring/Fall)
FLEX	Flexible Meeting
HTBA	hours to be arranged
M	Monday (Sp/Fall)
M-F	Monday through Friday
ME	Mon, Fri (Sp/Fall)
MTWT	Mon, Tues, Wed, Thurs
MW	Mon, Wed (Sp/Fall)
MWE	Mon, Wed, Fri (Sp/Fall)
RECF	Recitation-Friday (Sp/Fa)
RECM	Recitation-Monday (Sp/Fa)
RECW	Recitation-Wednesday (Sp/Fa)
RETH	Recitation-Thursda (Sp/Fa)

Please choose a meeting pattern from the dropdown list by clicking on the magnifying glass.

CL21 – Invalid Instructor

Error Specifications: The instructor's information needs to be updated and/or corrected. You must verify that the instructor has been made available to teach this course and has an active status. If not, the instructor will not be able to access the class roster or approve grades. Under the *Instructor/Advisor Table*, enter and/or update all fields.

Correction: Correct and/or update the instructor's information. Please note that the status of the instructor must be "Active" and the instructor must be made "Available."
Please note that the effective date should be before the start date of the semester.

Navigation: [Curriculum Management](#)>[Instructor/Advisor Table](#)

The screenshot displays the 'Instructor/Advisor Table' interface. The left sidebar shows a navigation menu with 'Instructor/Advisor Table' selected. The main content area is divided into two panels. The top panel, 'Instructor Details', shows fields for *Effective Date (08/23/2007), *Status (Active), *Instructor Type (Professor), *Academic Institution (USBNY), *Primary Acad Org (PHYSICS), and *Instructor Available (Available). The bottom panel, 'Instructor/Advisor Role', shows fields for Advisor Number (1), Percent of Appointment, *Academic Career, Academic Program, Academic Plan, and Academic Sub-Plan. Blue arrows point to the *Status, *Instructor Type, and *Instructor Available fields.

Instructor Details	
*Effective Date:	08/23/2007
*Status:	Active
*Instructor Type:	Professor
*Academic Institution:	USBNY
*Primary Acad Org:	PHYSICS
*Instructor Available:	Available

Instructor/Advisor Role	
Advisor Number:	1
*Academic Career:	
Academic Program:	
Academic Plan:	
Academic Sub-Plan:	

Also, please note that the instructor's primary academic organization is entered on the first panel only. To enter additional academic organizations for the instructor, you must go to the second panel and add a new row for each additional academic organization.

Instructor/Advisor Table Approved Courses

John Smith 100054901

Instructor Details Find | View All First 1 of 3 Last

Effective Date: 08/23/2007 Status: Inactive
 Instructor Type: Professor Advisor

Academic Institution: USBNY SUNY at Stony Brook
 Primary Acad Org: PHYSICS Physics and Astronomy

Course Description Customize | Find First 1 of 1 Last

Seq Nbr	*Acad Org	Subject Area	Course ID	Offer Nbr	Catalog Nbr	Campus
1	PHYSICS					

CL23 – Non Enroll Not Referred (Any)

Error Specifications: Similar to Error CL16, this error is connected to an auto-enrollment discrepancy.

Correction: Review and correct any discrepancies for the auto-enrollment sections.

Navigation: [Curriculum Management](#)>[Schedule of Classes](#)>[Update Sections of a Class](#)

Update Sections of a Class

Course ID: 200680 Course Offering Nbr: 2
 Academic Institution: SUNY at Stony Brook
 Term: Spring 2008 Undergrad
 Subject Area: CHE Chemistry
 Catalog Nbr: 132 General Chemistry II

Class Sections Customize | Find | View All First 1-8 of 34

Class Status Class Enrollment Limits

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enr 1	Auto Enr 2	Resection	*Conse
Spring	01	41768	Lecture	Open	N	A	9999				N
Spring	02	46814	Lecture	Open	N	A	9999				N
Spring	R01	41769	Recitation	Open	E	A	1	01			N
Spring	R02	41770	Recitation	Open	E	A	2	01			N
Spring	R03	41771	Recitation	Open	E	A	3	01			N
Spring	R04	41772	Recitation	Open	E	A	4	01			N
Spring	R05	41773	Recitation	Open	E	A	5	01			N
Spring	R06	41774	Recitation	Open	E	A	6	01			N

CL24 – Class Active – EnrolCap Zero

Error Specifications: An active course has an enrollment capacity of zero. While the course is scheduled and active, students will not be able to register for the course because the enrollment capacity will not allow it.

Correction: Simply input a valid entry for the Enrollment Capacity. In some cases, the enrollment capacity was set to 0 because the class will not be offered. In such cases, you will need to change the class status to “Inactive.”

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

Basic Data	Meetings	Enrollment Cntrl	Reserve Cap	Notes	LMS Data
Course ID:	204657	Course Offering Nbr:	1		
Academic Institution:	SUNY at Stony Brook				
Term:	Spring 2008		Undergrad		
Subject Area:	AAS		Asian & Asian American Studies		
Catalog Nbr:	476		Undergrad Teaching Practicum II		

Enrollment Control				Find View All	First	6 of 15
Session:	B	Full Spring Semester Session	Class Nbr:	49455		
Class Section:	T06	Component: Tutorial	Event ID:			
*Class Status:	Active		Cancel Class			
Class Type:	Enrollment	Enrollment Status:	Open			
*Consent:	Dept Cnsnt	Requested Room Capacity:	0	Total		
1st Auto Enroll Section:		Enrollment Capacity:	0	0		
2nd Auto Enroll Section:		Wait List Capacity:		0		
Resection to Section:		Minimum Enrollment Nbr:				
<input type="checkbox"/> Auto Enroll from Wait List		<input type="checkbox"/> Cancel if Student Enrolled				

CL26 – Class – Course Not Active

Error Specifications: A class has been scheduled for an inactive course. As there are often changes made to a specific course over time, there may be more than one entry for the same course under the *Course Catalog*. When multiple catalog entries exist, the course ID number of the active scheduled course must match the course ID number for the active catalog entry. First check the Course Catalog to review whether the Course Catalog ID # matches the course ID # for the scheduled course.

Correction: If the course ID #s for the correct catalog and schedule entries do not match, contact Judith Walpole or Nora Salguero for correction. Please keep in mind that any change to the Course Catalog should be approved by the appropriate academic deans' office.

Navigation: [Curriculum Management](#)>[Course Catalog](#)>[Course Catalog](#)

The screenshot displays the Course Catalog interface. On the left is a navigation menu with options like 'My Favorites', 'SBU', 'Self Service', 'Campus Community', 'Student Recruiting', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', 'Course Catalog', 'Course Equivalencies', 'Catalog Summary', 'Schedule of Classes', 'Roll Curriculum Data', 'Forward', 'Enrollment Requirements', 'Combined Sections', 'Dynamic Dates', 'Class Roster', 'Grading', 'Instructor/Advisor Information', and 'Financial Aid'. The main content area shows details for Course ID 201052. The 'Status' is 'Inactive'. The 'Effective Date' is 12/31/1997. The 'Description' is 'AMER COL,FED WRITERS'. The 'Long Course Title' is also 'AMER COL,FED WRITERS'. A 'Course Offering' dropdown shows 'EGL 316'. At the bottom, a table lists course units and hours:

Course Units/Hours/Count			
Minimum Units:	3.00	Last Course of Mult Term Seq:	<input type="checkbox"/>
Maximum Units:	3.00	Enrollment Unit Load Calc Type:	Actual Units
Academic Progress Units:	3.00	Course Count:	1.00
Financial Aid Progress Units:	3.00	Course Contact Hours:	3.00

While both screens show information for the same course (EGL 316), the course ID# listed for the inactive course does not match the course ID # for the active, scheduled course.

Course ID: 201112

Effective Date: 08/20/2001 Status: Active

Description: Early American Literature

Long Course Title: Early American Literature

Long Description:

Course Units/Hours/Count			
Minimum Units:	3.00	Last Course of Mult Term Seq:	<input type="checkbox"/>
Maximum Units:	3.00	Enrollment Unit Load Calc Type:	Actual Units
Academic Progress Units:	3.00	Course Count:	1.00
Financial Aid Progress Units:	3.00	Course Contact Hours:	3.00

CL28 – Class Instr Grade Rstr Access

Error Specifications: The wrong access has been granted to the instructor role.

Correction: Review the access which has been assigned to the instructor role. Simply correct any discrepancies. If you have any questions regarding which access should be assigned to a specific role, please refer to the “*Scheduling Classes in PeopleSoft*” Training Manual which can be accessed by visiting:

<http://clientsupport.cc.stonybrook.edu/staff/psoft/ps89training.shtml>

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

SBO

- Self Service
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
 - Course Catalog
 - Schedule of Classes
 - Class Search
 - Schedule New Course
 - Maintain Schedule of Classes
 - Schedule Class Meetings
 - Adjust Class Associations
 - Update Sections of a Class
 - Class Event Table
 - Exam Code Table
 - Generate Exam Schedule
 - Class Notes Table
 - Global Notes Table
 - Resource Queue Cleanup
 - Review Message Log
 - Roll Curriculum Data Forward
 - Enrollment Requirements
 - Combined Sections

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes LMS Data

Course ID: 200680 Course Offering Nbr: 2
 Academic Institution: SUNY at Stony Brook
 Term: Spring 2008 Undergrad
 Subject Area: CHE Chemistry
 Catalog Nbr: 132 General Chemistry II INSTR_ORG_

Class Sections Find | View All First 1 of 34 Last

Session: B Full Spring Semester Session Class Nbr: 41768
 Class Section: 01 Component: Lecture Event ID: 000075346

Meeting Pattern Find | View All First 1 of 1 Last

Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	T	F	S	S	*Start/End Date
S025000012	570	MWF	10:40AM	11:35AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01/28/2008 05/20/2008

Lecctr 100 Topic ID: Free Format Topic: [View Hours](#)

Print Topic On Transcript

Instructors For Meeting Pattern Customize | Find | View All First 1-2 of 3 Last

Assignment Workload

ID	Name	*Instructor Role	Print	Access	Contact
100034280	Lacey,Roy A.	Prim In:	<input checked="" type="checkbox"/>	Approve	165 + -
100261158	Hanson,David M.	Admin	<input checked="" type="checkbox"/>	Grade	+ -

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL29 – Class Instr Invalid Role

Error Specifications: The wrong access has been granted to the instructor role. Usually this occurs when a teacher assistant has an approved access. A TA should never be granted access to approve grades. All TA's are to be supervised, and therefore only the “supervisor” should have approval access.

Correction: Simply correct the access for the instructor role. In this example, the TA should not have Approve Access. The Primary Instructor should be the only role to have access to approve grades.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	T	F	S	S	*Start/End Date
S025000012	570	MWF	10:40AM	11:35AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01/28/2008 - 05/20/2008

ID	Name	*Instructor Role	Print	Access	Contact
100034280	Lacey, Roy A.	Prim Inst	<input checked="" type="checkbox"/>	Approve	165
100261158	Hanson, David M.	Admin	<input checked="" type="checkbox"/>	Approve	

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL35 – Grade Rstr Access Appr Not = 1

Error Specifications: The approved instructor for grades is not equal to one. Each section should have no less than and no more than one instructor with access to approve grades. This error message will identify classes that have no instructor listed with Approve Access AND classes with more than one instructor with Approve Access.

Correction: Correct the access by appointing only one instructor with Approve Access. In this example, we corrected the TA's role by changing the access to Grade.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

ID	Name	*Instructor Role	Print	Access	Contact
100110359	Waters, Harriet S.	Prim Inst	<input checked="" type="checkbox"/>	Approve	165
105229397	Apetroaia, Adela Ileana	TA	<input checked="" type="checkbox"/>	Grade	

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL36 – Grade Rstr Incorrect TA Access

Error Specifications: A teacher assistant has been granted the wrong access. Again, a TA should never be granted access to approve grades. All TA's are to be supervised, and therefore only the "supervisor" should have approval access.

Correction: Simply correct the TA's access. In this example, we changed the TA's access to Graded.

Navigation: [Curriculum Management > Schedule of Classes > Maintain Schedule of Classes](#)

ID	Name	*Instructor Role	Print	Access	Contact
100110359	Waters, Harriet S.	Prim Int	<input checked="" type="checkbox"/>	Approve	165
105229397	Apetroaia, Adela Ileana	TA	<input checked="" type="checkbox"/>	Grade	
104614394	Oh, Hwamee	TA	<input checked="" type="checkbox"/>	Grade	

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL37 – Grade Rstr Access PI: REC LAB

Error Specifications: A primary instructor is listed for a recitation or a lab. In most cases, the primary instructor is never listed for the recitation or the lab but rather only listed for the lecture.

Correction: Under the Meetings Tab, update or correct the role of the instructor for the class.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The left sidebar contains a navigation menu with options like 'Campus Community', 'Student Recruiting', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', and 'Schedule of Classes'. The main content area is divided into tabs: 'Basic Data', 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', and 'LMS Data'. The 'Meetings' tab is selected, showing details for Course ID 200080, Academic Institution SUNY at Stony Brook, Term Spring 2008, and Subject Area AMS. The 'Class Sections' section shows Session B, Class Section R01, Component Recitation, Class Nbr 51720, and Event ID 000077297. The 'Meeting Pattern' section shows Facility ID S037000272, Capacity 48, Pat REC, Mtg Start 10:40AM, Mtg End 11:35AM, and a meeting pattern of T F S S. The 'Instructors For Meeting Pattern' section shows a table with columns for ID, Name, *Instructor Role, Print, Access, and Contact. The first instructor listed is Fortmann, Charles M. with ID 100240474 and a role of 'Prim In:'. A blue arrow points to the 'Prim In:' dropdown menu in the instructor table.

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL38 – Grade Rstr Access TA: Tut CLIN

Error Specifications: Similar to Error # 29, the wrong access has been assigned to the instructor role. Specifically in this error, a TA has been granted Approved Access for a specific class. As mentioned earlier, the primary instructor should be the only instructor role with Approved Access.

Correction: Assign the proper access to the TA Role.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

ID	Name	*Instructor Role	Print	Access	Contact
103732541	Barger, Laura A	TA	<input checked="" type="checkbox"/>	Approve	

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL39 – Grade Rstr SUP ADMIN Print CHK

Error Specifications: The Print Box has been checked for the administrator. The administrator should never be checked to print. This will cause the administrator to be listed as the instructor of the class.

Correction: Simply uncheck the Print Box next to the administrator.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The 'Instructors For Meeting Pattern' section is active, showing a table of instructors. The 'Print' checkbox for the instructor 'Cannella, Dolores Teresa' is highlighted with a blue arrow, indicating it should be unchecked.

ID	Name	Instructor Role	Print	Access	Contact
100238105	Wortman, Camille B.	Prim In	<input checked="" type="checkbox"/>	Approve	165
102272909	Cannella, Dolores Teresa	Admin	<input type="checkbox"/>	Grade	

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL40 – Grade Rstr Access Instr Blank

Error Specifications: The instructor is not listed for the class.

Correction: Input an instructor for the class and assign a valid access role. Please note that you can conduct a search for the instructor's name and/or ID by clicking on the magnifying glass.

Navigation: [Curriculum Management](#) > [Schedule of Classes](#) > [Maintain Schedule of Classes](#)

The screenshot displays the 'Maintain Schedule of Classes' interface. The left sidebar contains a navigation menu with options like 'Self Service', 'Campus Community', 'Student Recruiting', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', and 'Roll Curriculum Data'. The main content area is divided into tabs: 'Basic Data', 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', and 'LMS Data'. The 'Basic Data' tab is active, showing course information: Course ID: 305869, Academic Institution: SUNY at Stony Brook, Term: Spring 2008, Subject Area: BUS, Catalog Nbr: 111, Course Offering Nbr: 1, Undergrad, Business Management, Intro to Bus for Non-Bus Maj, and INSTR_ORG. Below this, the 'Class Sections' section shows Session: B, Class Section: 01, Component: Lecture, Full Spring Semester Session, Class Nbr: 57467, and Event ID: 000076501. The 'Meeting Pattern' section shows Facility ID: S002000047, Capacity: 232, Pat: MW, Mtg Start: 3:50PM, Mtg End: 5:10PM, and Meeting Pattern: MW. The 'Instructors For Meeting Pattern' section shows an instructor with ID: 100040050, Name: Johnston, Douglas E., and Role: Prim In. A blue arrow points to the 'Access' dropdown menu in the instructor list.

Please note that entry of instructor and meeting time data directly affects CASA data. Therefore, accurate entry is essential.

CL41 – Combined Class Inactive Status

Error Specifications: One of the combined classes has an inactive course. Since this error is primarily connected to the *Combined Sections* Screen, you must contact the Registrar's Office for correction.

CL44 – Auto-Enrol E not refd to 9999

Error Specifications: Similar to Error# 16, a multi-component class does not have an entry under the auto-enroll section. This will prevent the student from successfully auto enrolling into both components of the class.

Correction: Input a valid entry under the Auto Enrl 1 Box. In this example the section for the non-enrollment component, section 01, should be entered as shown below.

Navigation: [Curriculum Management](#)>[Schedule of Classes](#)>[Update Sections of a Class](#)

Update Sections of a Class

Course ID: 201359 Course Offering Nbr: 3
Academic Institution: SUNY at Stony Brook
Term: Spring 2008 Undergrad
Subject Area: MEC Mechanical Engineering
Catalog Nbr: 260 Engineering Statics

Class Sections Customize | Find | View All | First 1-3 of 3 Last

Session	Section	Class Nbr	Component	Enrollment Status	*Class Type	*Class Stat	*Assoc	Auto Enrl 1	Auto Enrl 2	Resection	*Consent	Schd Print
Spring	01	51270	Lecture	Open	N	A	9999				N	<input checked="" type="checkbox"/>
Spring	R01	53681	Recitation	Open	E	A	1	01			N	<input checked="" type="checkbox"/>
Spring	R02	53691	Recitation	Open	E	A	2				N	<input checked="" type="checkbox"/>

17. Print Course Schedule Sheets

This report prints the department class schedule in a weekly grid format.

Navigation:

SBU → SBU Student Records → Report → SU Crse Schedule Sheets

SU Crse Schedule Sheets
Enter any information you have and click Search. Leave fields blank for

Find an Existing Value | Add a New Value

Run Control ID: begins with

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Search Results
View All | First | 1-2 of 2 | Last

Run Control ID	Language Code
SRDPTSCH	English
psreports	English

Click **Search** and select the *Run Control ID* called **psreports**.

If you haven't created a *Run Control ID* yet, click the **Add a New Value** tab. Do not use the *Run Control ID* one that is the same as your user name.

Enter a new *Run Control ID* (**psreports**) and click **Add**.

Crse Schedule Sheets

Run Control ID: psreports | Report Manager | Process Monitor | Run

*Academic Institution: USBNY | SUNY at Stony Brook

*Term: 1094 | Spring 2009

Subject Area: MAT | Women's Studies

Acad Org:

Display Options

- Show Instructors
- Show Facility Info
- Show Enroll Cap/Tot

Academic Career

- Undergrad
- Grad

Save | Add | Update/Display

Select the **Term**

Select the **Subject Area** or the **Academic Org** (not both)

Select the **Display Options**
Select the **Academic Career**

Click **Run**

Click the **Report Manager** link.

Administration Archives

View Reports For

User ID: SRDPTSCH Type: Last: 1 Days Refresh

Status: Folder: Instance:

Report List Customize | Find | View All | First 1-2 of 2 Last

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	453193	3032639	Course Schedule Sheets	01/15/2009 12:47:24PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	453178	3032621	Transcript Print All	01/15/2009 10:19:28AM	Acrobat (*.pdf)	Not Posted	

Select All Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to SU Crse Schedule Sheets](#)

Save

Click **Refresh** until you see **Posted** under the Status column

Click **Details**

This will take you to the *Report Detail Page*

Report Detail

Report

Report ID: 453193 Process Instance: 3032639 [Message Log](#)

Name: SUSR8CSS Process Type: SQR Report

Run Status: Success

Course Schedule Sheets

Distribution Details

Distribution Node: pnsrepos2 Expiration Date: 02/14/2009

File List

Name	File Size (bytes)	Datetime Created
SQR_SUSR8CSS_3032639.log	1,697	01/15/2009 12:48:02.000000PM EST
susr8css_3032639.PDF	108,631	01/15/2009 12:48:02.000000PM EST
SUSR8CSS_3032639.pdf	985	01/15/2009 12:48:02.000000PM EST

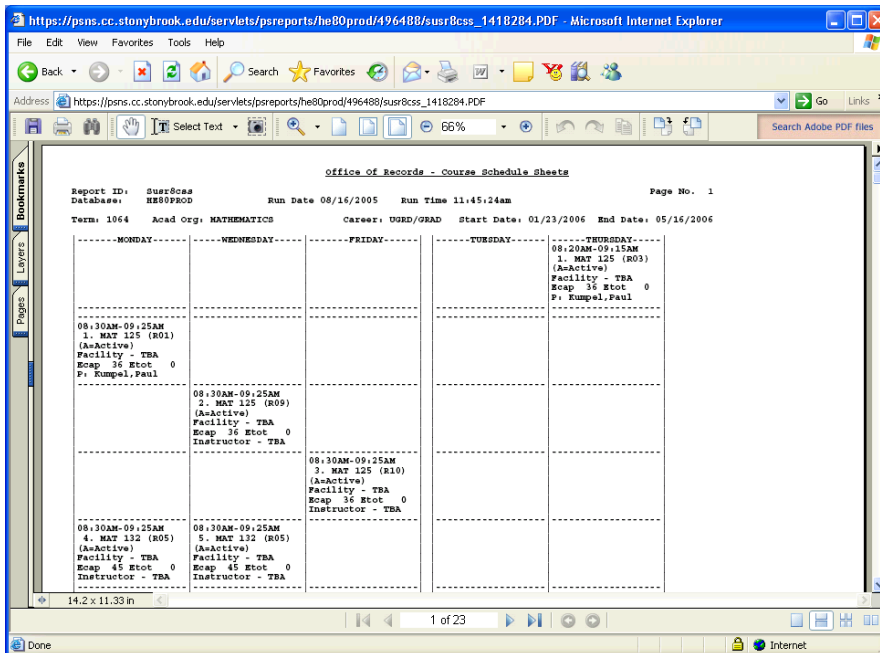
Distribute To

Distribution ID Type	*Distribution ID
User	SRDPTSCH

OK Cancel

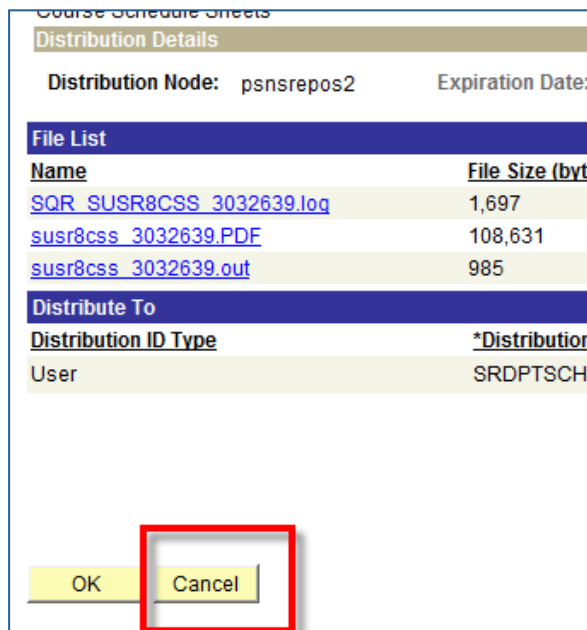
Click the **.pdf** file under File List to open the report

The report will appear in a separate Adobe Acrobat window.

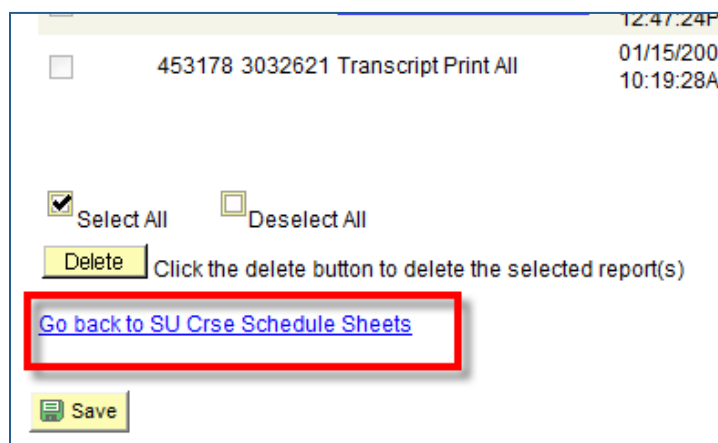


To save the report click **File > Save As**.

Then close the Adobe Acrobat window.



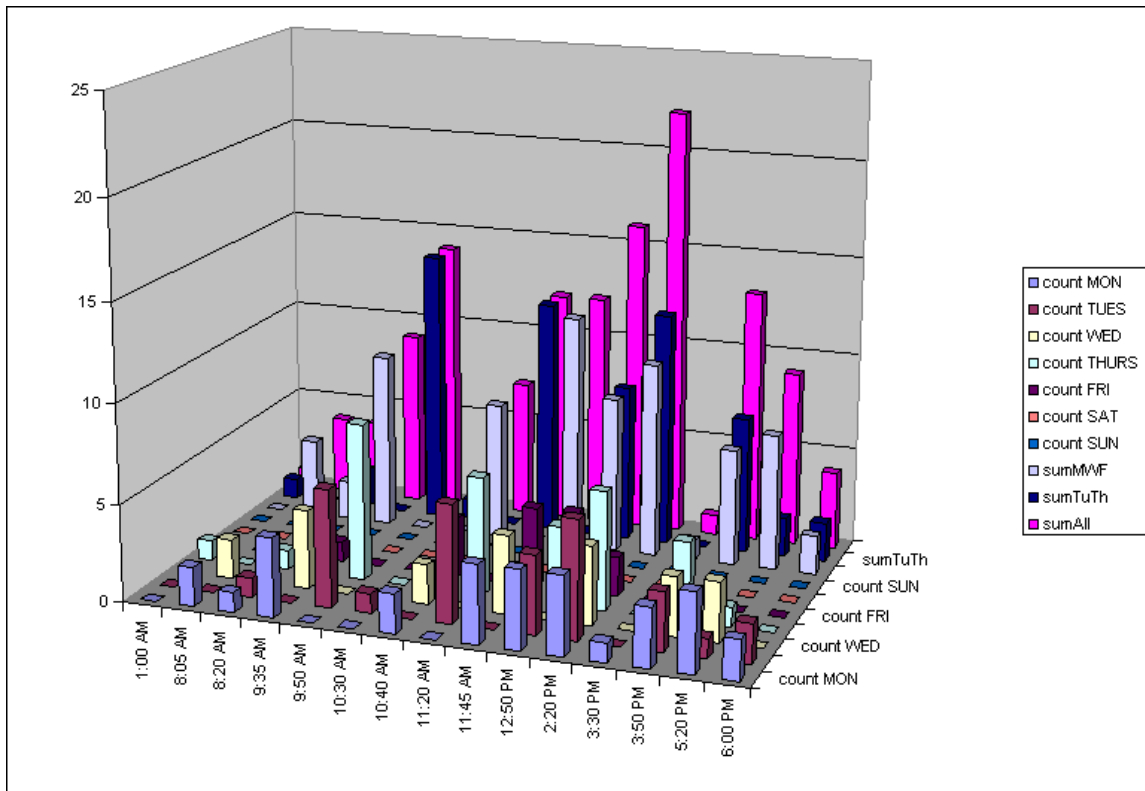
Click **Cancel** at the *Report Detail* page.



Click **Go back to SU Crse Schedule Sheets**

18. Print Meeting Vector Counts

This report provides a visual representation of class distribution for a specified semester based on class start time.



Navigation:

SBU → SBU Student Records → Report → SU Meeting Vector Counts

The screenshot shows the 'SU Meeting Vector Counts' search interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs, there is a search criteria field labeled 'Search by: Run Control ID begins with' and a 'Case Sensitive' checkbox. A yellow 'Search' button is highlighted with a red box. Below the search area, the 'Search Results' section shows a table with two columns: 'Run Control ID' and 'Language Code'. The first row is 'SRDPTSCH' with 'English'. The second row is 'psreports' with 'English', and this row is highlighted with a red box.

Run Control ID	Language Code
SRDPTSCH	English
psreports	English

Click **Search** and select the *Run Control ID* called **psreports**.

If you haven't created a *Run Control ID* yet, click the **Add a New Value** tab. Do not use the *Run Control ID* one that is the same as your user name.

Enter a new *Run Control ID* (**psreports**) and click **Add**.

SU Meeting Vector Count

Run Control ID: psreports

[Report Manager](#) [Process Monitor](#)

Academic Institution: USBNY SUNY at Stony Brook

*Term: 1094 Spring 2009

Subject Area:

Acad Org: MATHEMATIC Mathematics

Academic Career

- Ugrd
- Grad

Components

- All Components
- Lecture
- Lab
- Recitation
- Eve Lecture
- Seminar
- Supervised

Room Cap Range

- All Room Sizes
- 0-29
- 30-60
- 61-69
- 70-103
- 104-183
- 184-218
- 219-266
- 267-348
- 349 and Higher

Select the **Term**.

Select the **Subject Area** or **Acad Org** (not both). (Choose **SB (Stony Brook University)** if you'd like to show all departments).

Select the **Academic Career**.

Select the **Component(s)**.

Select the **Room Cap Range**.

Click **Run**.

Click the **Report Manager** link.

This will take you to the *Report List* page.

Administration Archives

View Reports For

User ID: SRDPTSCH Type: [v] Last: 1 Days Refresh

Status: [v] Folder: [v] Instance: [v] to [v]

Report List Customize Find View All First 1-3 of 3 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	453197	3032644	Vector Meeting Counts	01/15/2009 2:02:32PM	Comma delimited (*.csv)	Posted	Details
<input type="checkbox"/>	453193	3032639	Course Schedule Sheets	01/15/2009 12:47:24PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	453178	3032621	Transcript Print All	01/15/2009 10:19:28AM	Acrobat (*.pdf)	Not Posted	

Select All Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to SU Meeting Vector Counts](#)

Save

Click **Refresh** until you see **Posted** under the Status column

Click **Details**

This will take you to the *Report Detail* page.

Report Detail

Report

Report ID: 453197 Process Instance: 3032644 [Message Log](#)

Name: SUSR8VEC Process Type: SQR Report

Run Status: Success

Vector Meeting Counts

Distribution Details

Distribution Node: pnsrepos2 Expiration Date: 02/14/2009

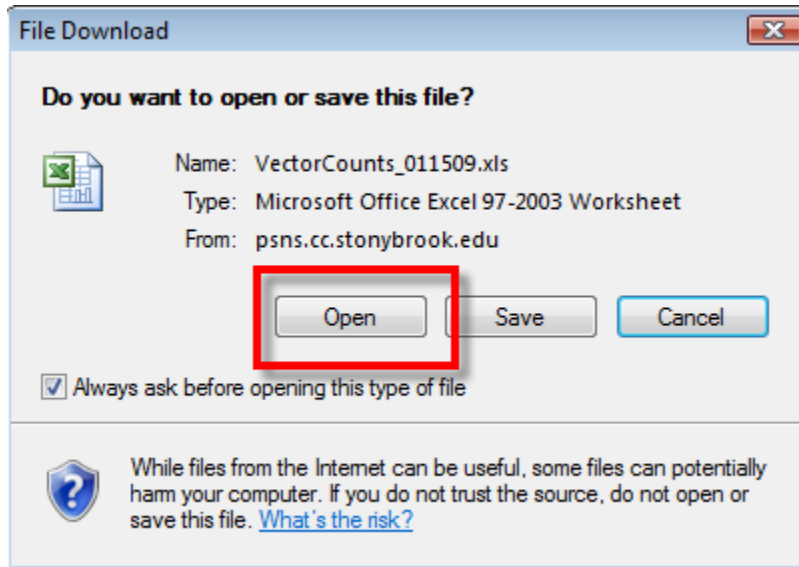
File List

Name	File Size (bytes)	Datetime Created
SQR_SUSR8VEC_3032644.log	1,721	01/15/2009 2:03:01.000000PM EST
VectorCounts_011509.CSV	1,673	01/15/2009 2:03:01.000000PM EST
susr8vec_3032644.out	2,045	01/15/2009 2:03:01.000000PM EST

Distribute To

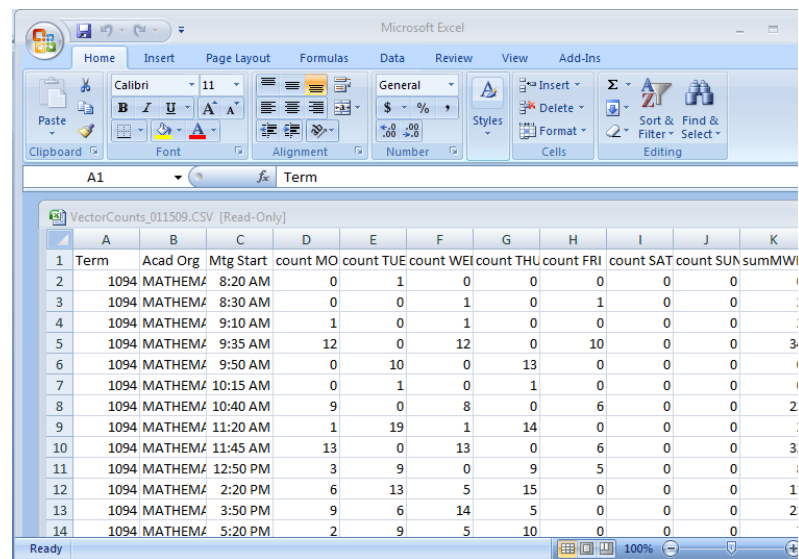
Distribution ID Type	*Distribution ID
User	SRDPTSCH

Click the **.csv** file under *File List* to open the report

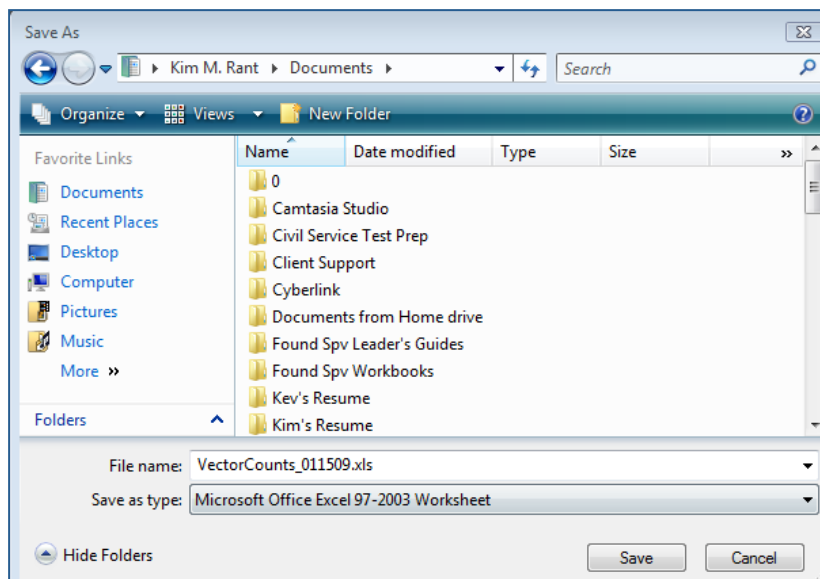


Click **Open**

Excel opens with the spreadsheet displayed



Click **File > Save As**



Complete the **Save As** dialog box making sure that you select **Microsoft Office Excel Worksheet** in the **Save as type** field

Click **Save**

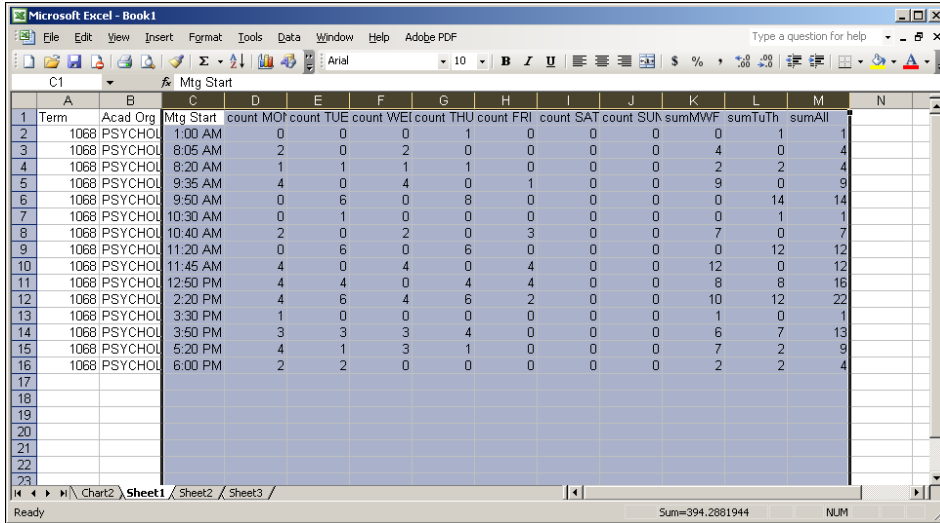
Generating the Chart

For this information to be useful, you need to generate

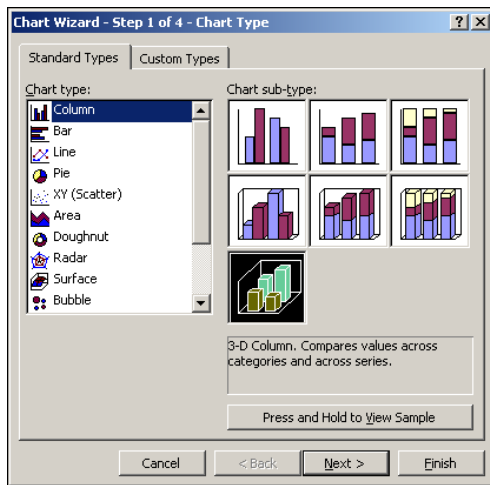
a chart in Excel.

For Excel 2003:

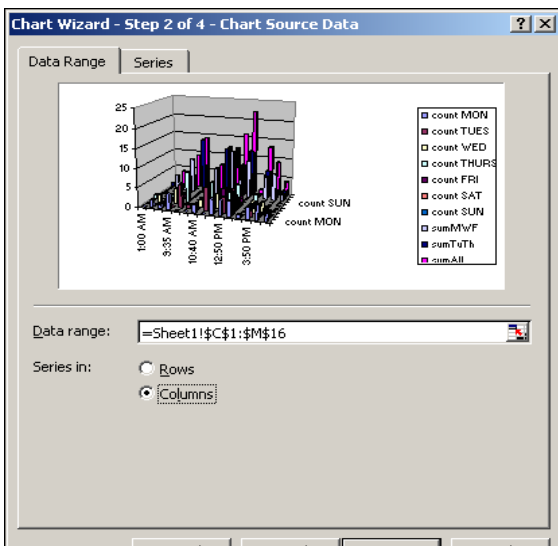
- Select columns C (Mtg Start) through M (sumALL)



- Click the **Insert** menu and select **Chart** (or click the **Chart Wizard** button on the toolbar)

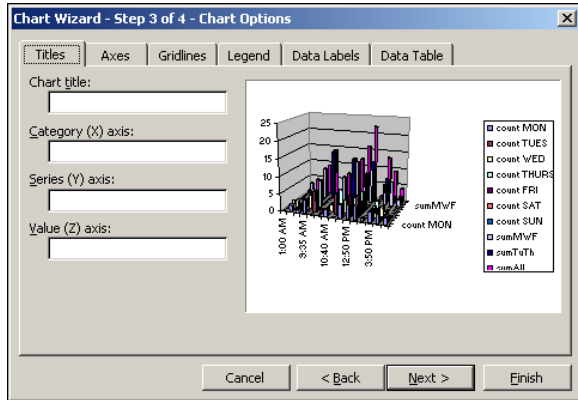


Select the **3-D column** chart type and click **Next**

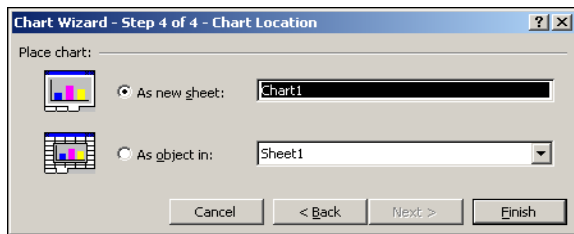


The **Data Range** should already be filled in based on columns C through M that you selected before.

Under **Series In** select **Columns** and click **Next**



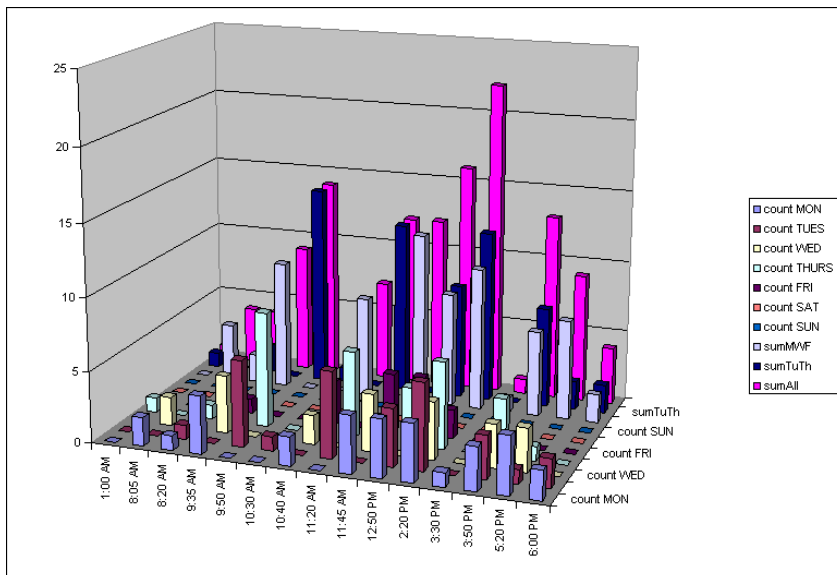
Enter a **Chart Title** and click **Next**



Select **As new sheet** and click **Finish**

This will place the chart on a separate worksheet within the workbook

The resulting chart should give you a visual representation of your course distribution. You can change the perspective on the chart by hovering your cursor over the “corners” if the chart, and spinning it around.



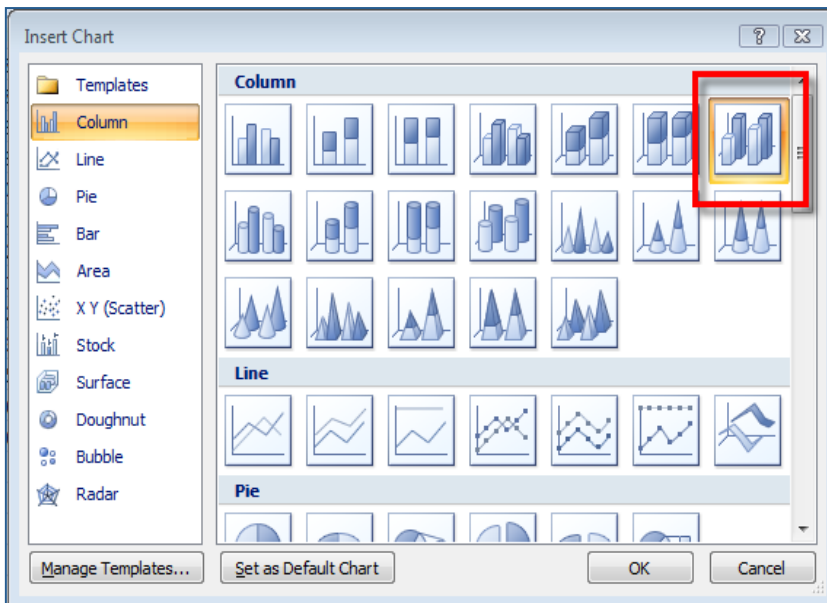
Don't forget to **save** the workbook again.

For Excel 2007:

- Select **columns C (Mtg Start) through M (sumALL)**

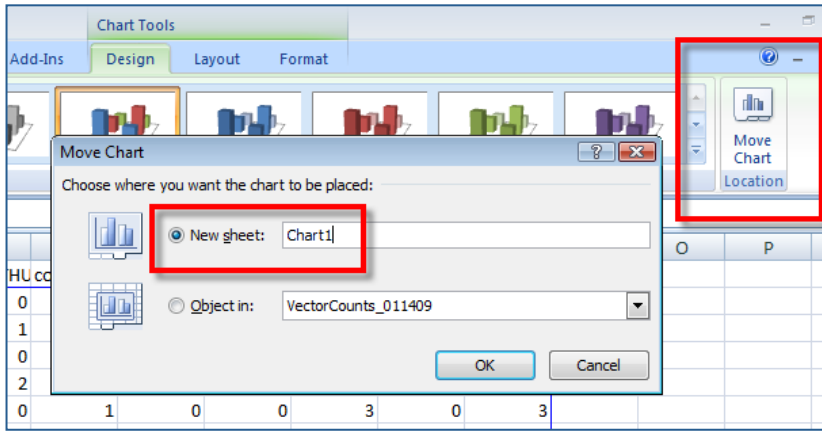
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Term	Acad Org	Mtg Start	count MO	count TUE	count WED	count THU	count FRI	count SAT	count SUN	sumMWF	sumTuTh	sumAll	
2	1088	WOMENSTUDY	8:05 AM	1	0	1	0	0	0	0	2	0	2	
3	1088	WOMENSTUDY	8:20 AM	0	1	0	1	0	0	0	0	2	2	
4	1088	WOMENSTUDY	9:35 AM	2	0	2	0	2	0	0	6	0	6	
5	1088	WOMENSTUDY	9:50 AM	0	2	0	2	0	0	0	0	4	4	
6	1088	WOMENSTUDY	10:40 AM	1	0	1	0	1	0	0	3	0	3	
7	1088	WOMENSTUDY	11:20 AM	0	3	0	3	0	0	0	0	6	6	
8	1088	WOMENSTUDY	12:50 PM	1	4	0	5	1	0	0	2	9	11	
9	1088	WOMENSTUDY	1:00 PM	1	0	0	0	0	0	0	1	0	1	
10	1088	WOMENSTUDY	2:20 PM	3	1	4	2	0	0	0	7	3	10	
11	1088	WOMENSTUDY	3:50 PM	2	3	2	2	0	0	0	4	5	9	
12	1088	WOMENSTUDY	5:20 PM	2	1	1	1	0	0	0	3	2	5	
13	1088	WOMENSTUDY	6:50 PM	0	2	0	1	0	0	0	0	3	3	
14	1088	WOMENSTUDY	6:55 PM	2	0	2	0	0	0	0	4	0	4	
15														
16														
17														

- Click the **Insert** tab and in the **Charts** group click the **Column** button and then click **All Chart Types** (at the bottom)



Click the **3-D Column** chart type

Click **OK**



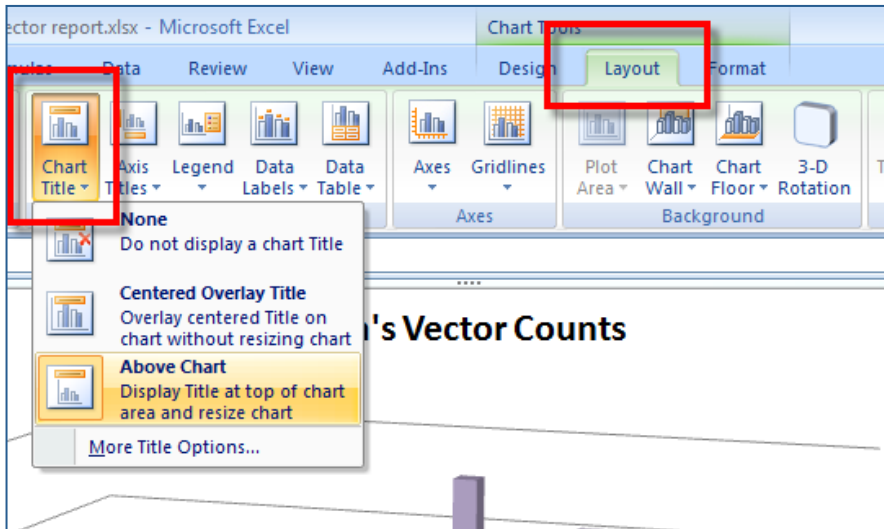
While still in the **Design** tab click **Move Chart Location**

Choose **New Sheet**

Click **OK**

This will place the chart on a separate worksheet within the workbook

Click some of the options in the **Chart Layout** group to find a layout that works best for you.



Click the **Layout** tab

Click **Chart Title** in the **Labels** group and enter a Title for your chart

workbook again.

Don't forget to **save** the

19. Give Permission to Register

Class Permissions is another method that some departments use to control WHO is able to enroll in their classes.

- Some courses require the “**consent**” of the department or the instructor. The student must go to the department and the department must issue “permission” for them to register.

How do you know if department or instructor consent is required? Go to **Curriculum Management > Maintain Schedule of Classes**. Click the **Enrollment Cntrl** tab and see what it says in the **Add Consent** field.

- Certain classes have prerequisites. If the student did not complete the **prerequisites** for the class they cannot register. The Department can override this by issuing permission for the student to register for the class.

How do you know if prerequisite screening is “turned on”? Go to **Curriculum Management > Adjust Class Associations**. Make sure that **Also Use Catalog Requisite** is checked.

- If the class is **closed** (full) or if there is a reserve on the class and the student doesn’t meet the reserve requirement the department can override this by issuing permission for the student to register for the class.

The Department Scheduler issues “permission” to register for the class by entering the student’s Stony Brook ID on the **Class Permissions** page and selecting the appropriate option – **Closed Class, Requisites Not Met** or **Consent Required**. The student will receive a message in SOLAR instructing them that they have been given permission to register for the class and must do so by the expiration date. The student can then go into SOLAR and register for the class.

Navigation:

Records and Enrollment > Term Processing > Class Permissions > Class Permissions

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

Find an Existing Value

Academic Institution: = USBNY
Term: = 1098
Subject Area: = WRT
Catalog Nbr: begins with 101
Academic Career: =
Campus: begins with
Description: begins with
Course ID: begins with
Course Offering Nbr: =

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Search Results
View All

Academic Institution	Term	Subject Area	Catalog Nbr	Academic Career	Campus
USBNY	1098	WRT	101	Undergrad	STHMP
USBNY	1098	WRT	101	Undergrad	WEST

Enter the **Term**

Enter the **Subject Area**

Enter the **Catalog Number**

If this course is offered on different campuses select the **Campus**.

Click **Search**

Click the **Permission to Add** tab.

Make sure you navigate to the **Class Section** that you want to give the student(s) permission to enroll in!

The screenshot shows the 'Permission to Add' interface. At the top, the 'Permission to Add' tab is highlighted with a red box. Below it, course information is displayed: Course ID: 201019, Academic Institution: SUNY at Stony Brook, Term: Fall 2009, Subject Area: WRT, Catalog Nbr: 101. Course Offer details include Undergrad, Writing, and Introductory W. A callout bubble points to the 'Next' arrow in the pagination controls, stating 'Click the Next arrow to navigate to the correct class section!'. The 'Class Section Data' section shows Session: A, Full Fall Semester Session, Class Nbr: 70043, Class Status: Cancelled Section, Class Section: 80, Class Type: Enrollment Section, Component: Lecture, and Instructor: . A callout bubble points to the 'Permission' tab in the 'Class Permission Data' section, stating 'Click the Permission tab, enter the student's ID and select the option.'. Below this, the 'Defaults' section shows an Expiration Date of 11/14/2009. The 'Class Permission Data' table has tabs for 'General Info', 'Permission', and 'Comments'. A callout bubble points to the '+' button in the 'Max Credits' column of the table, stating 'Click the + to add another student's ID'. The table has columns: Seq #, Number, ID, Closed Class, Requisites Not Met, Consent Required, Career Restriction, Permission Time Period, and Max Credits. The first row shows Seq # 1, ID 123456789, and Max Credits 3. A callout bubble points to the 'Save' button at the bottom left, stating 'Don't forget to Save'. The bottom navigation bar includes 'Save', 'Return to Search', 'Previous in List', and 'Next in List' buttons.

The **Expiration Date** is set to default to the end of the add/drop period. **DO NOT change this.**

Enter the student's **Stony Brook ID**.

Select the reason for the permission - **Closed Class**,

Requisites Not Met or Consent Required.

If this is a variable credit course enter the **Max Credits**. Departments must enter a credit value when issuing permission for a variable credit course and students will be locked into this credit value when enrolling.

Click the **Comments** tab to add comments. This is not required.

Click **Save**.



To add another student, click the **Add a new row** button.

To check the status, click the **General Info** tab to see whether the student actually did enroll ("**Used**") or not ("**Not used**").

20. Print a Class/Grade Roster

Navigation:

SBU > SBU Student Records > Curriculum Management > Class Rosters

Find an Existing Value | Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search | [Advanced Search](#)

Search Results

View All | First | 1 of 1 | Last

Run Control ID	Language Code
psreports	English

If you already have a Run Control ID click **Search** and then choose the Run Control ID from the list (as shown in this example).

Find an Existing Value | **Add a New Value**

Run Control ID: psreports

Add

[Find an Existing Value](#) | [Add a New Value](#)



If you do not have a Run Control ID click the **Add a New Value** tab and add the new Run Control ID (we suggest that you call it “psreports”).

This will bring you to the **Class Roster** page.

The screenshot shows the 'Class Roster' web application interface. At the top, it displays 'Run Control ID: PSREPORTS' and navigation links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below this, there are input fields for '*Academic Institution:' (containing 'USBNY' and 'SUNY at Stony Brook') and '*Term:' (containing '1078' and 'Fall 2007'). A central 'Assignment' section includes a dropdown for '*Session:' (set to 'Full Fall Semester Session') and a dropdown for 'Sort Options:' (set to 'Status, Last Name, First Name'). To the left of the 'Assignment' section is a 'Select One of the Following' panel with searchable input fields for 'Academic Organization:', 'Subject Area:' (containing 'AMS'), 'Catalog Nbr:', and 'Class Nbr:'. To the right are two panels: 'Students In The Report' with checkboxes for 'Enrolled Students' (checked), 'Dropped Students', and 'Waitlisted Students'; and 'Report Print Options' with checkboxes for 'Display Class Info (CSV Only)', 'Display Grades', and 'Display Permissions'. At the bottom of the form are buttons for 'Save', 'Add', and 'Update/Display'.

Enter the

parameters for your report:

1. Enter the **Term** and the appropriate **Session** for that Term. (The Session Code is required!)
2. Choose the **Sort Options**.
3. Select one of the following:
 - **Academic Organization** if you want rosters for all of the classes in your department.
 -  If you do not know the Academic Organization code for your department click the **Lookup** button to search for it.
 - **Subject Area** if you want rosters for classes in a specific Subject Area.
 - **Subject Area** and **Catalog Number** if you want rosters for classes in a specific Subject Area and Catalog Number.
 - **Class Nbr** if you want a roster for one specific class.
 -  If you do not know the Class Number click the **Lookup** button and choose the Advanced Search link to search for the class by Subject Area, Catalog Number and Class Section.

IMPORTANT! If you have a value in one field the other fields will gray out. To “un-gray” the grayed out fields you must remove the value from the field and then press your **TAB** key.

4. Select the group(s) of students that you want included in your report – **Enrolled, Dropped, Waitlisted**.

5. Select the **Report Print Options**: Class Rosters print in **.pdf** format by default.
If you want your class roster(s) in **.csv** format so that you can save it as an Excel spreadsheet you must select **Display Class Info (CSV Only)**.
Select the **Display Grades** checkbox if you want your roster to include grades. This option is only available in **.pdf** format.

6. Click **Run**

To Retrieve Your Report:

Click the **Report Manager** link to go to the **Report List** page.

Your report will only be listed in the Report Manager once the process has run successfully on the server.

The screenshot shows the 'Report Manager' interface. At the top, there are tabs for 'Administration' and 'Archives'. Below that, a 'View Reports For' section includes fields for 'User ID' (SRDPTSCH), 'Type', 'Last' (1 Days), and a 'Refresh' button. A 'Status' dropdown is also present. Below this is a 'Report List' table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, and Details. Two reports are listed, both 'Class Roster Report'. The first report (ID 7725) has a status of 'Posted' and a 'Details' link. The second report (ID 7724) has a status of 'Processing'. Below the table are 'Select All', 'Deselect All', and 'Delete' buttons. A 'Save' button is at the bottom left. To the right, a 'Report Detail' view for report ID 7725 is shown, including 'Name' (SU_SR011), 'Process Type' (SQR Report), 'Run Status' (Success), and 'Distribution Details' (Distribution Node: psnsrepos1, Expiration Date: 12/27/2007). Below that is a 'File List' table with columns: Name, File Size (bytes), and Datetime Created. Three files are listed: 'SQR_SU_SR011_2525802.log', 'su_sr011_2525802.PDF' (highlighted with a red box), and 'SU_SR011_2525802.out'. At the bottom, a 'Distribute To' section shows 'Distribution ID Type' as 'User' and '*Distribution ID' as 'SRDPTSCH'. Two yellow callout boxes provide instructions: 'Keep clicking the Refresh button to refresh the page status' and 'When the status displays "Posted" click the Details link to retrieve your report'.

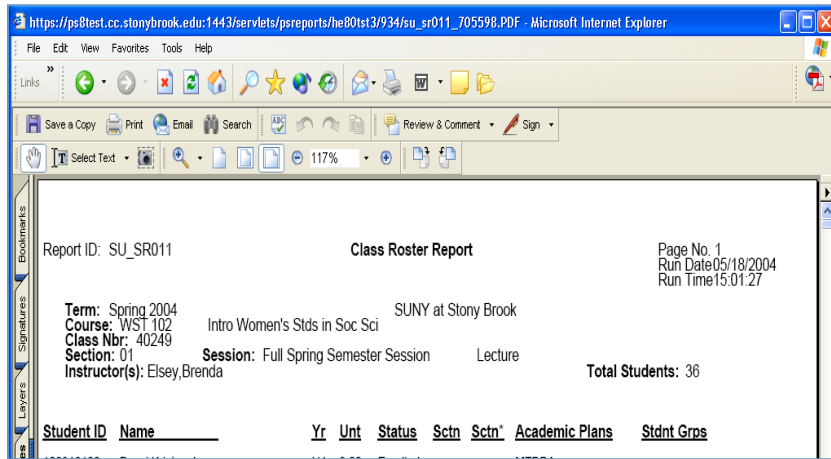
Keep clicking the **Refresh** button to refresh the page status

When the status displays "Posted" click the **Details** link to retrieve your report

Click the **.pdf** or **.csv** file listed on this page.

Note: If you do not see a **.pdf** for **.csv** file, the process ran but did not produce any output for a report. Go back and check the parameters entered on the **Class Rosters** page to make sure they are correct then run your report again.

The **.pdf** report will open in Adobe Acrobat.



Click the **Print** button to print it.

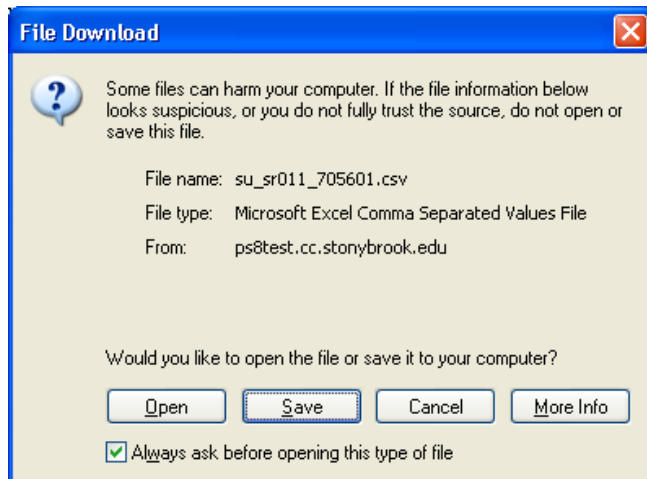
Click the **Close** button (X) in the upper right corner of the Adobe window to close it.

Cancel out of the **Report**

Detail window.

Click **Go back to Class Rosters** to return to that page.

The **.csv** report will display this dialog box:



Click **Save**.

You can open the report in Excel later.

After saving, cancel out of the **Report**

Detail window.

Click **Go back to Class Rosters** to return to the **Class Rosters** page.

21. How to Finalize Class Schedule Data

The class schedule data reported to SUNY and used for instructional workload analysis (previously called “CASA”) are derived from the Course Catalog and the Meetings page in the Schedule of Classes group (Curriculum Management > Schedule of Classes > Schedule Class Meetings > Search for Class).

These data are completed in an editing process in which (i) scheduling information is finalized and adjusted to provide complete and accurate information about each course section, and (ii) the effort allocation recorded for team taught courses is adjusted if effort is not apportioned equally among the instructors. A special PeopleSoft edit access is required and may be obtained by contacting Beverly Rivera or Michael Mooney in the Registrar’s Office.

Departments are responsible for providing complete and accurate data on five characteristics of every course section:

- instructor or instructors
- effort distribution among instructors for team taught courses, recorded by distributing instructor contact minutes
- the meeting pattern (days and time)
- start and end times (except for tutorial, clinical, supervised teaching, and distance-learning sections, which are always entered with the default of 1:00 a.m. to 1:00 a.m.)
- location, entered by recording the facility ID

Instructor information can be entered at any time. Other missing data and effort-distribution data are entered when the class schedule is opened for final editing after the enrollment snapshot.

The screenshot below shows the location of class schedule data on the meetings panel. Note that you must use the “view all” option to see more than two instructors.

ID	Name	Instructor Role	Print	Access	Contact
100241507	Cabot, John B.	Prim Instr	<input checked="" type="checkbox"/>	Approve	102
100269150	McKinnon, David	Sec Instr	<input checked="" type="checkbox"/>	Grade	45
100152771	Dilger, Kathleen T.	Supervisor	<input type="checkbox"/>	Grade	
100364002	Rosati, Barbara	Sec Instr	<input type="checkbox"/>	Grade	
105378958	Lazarus, Matthew S	TA Rdr/Grd	<input type="checkbox"/>		13

Instructors. Instructor information should be entered as soon as it is available. Instructors must be entered into the Instructor table before they can be assigned to courses. Each instructor's role must be properly identified. "Primary instructors," "secondary instructors," and "teaching assistants" are reported in CASA and assigned contact minutes.

Graduate or undergraduate students who do not meet course sections but need access to PeopleSoft data to work as graders should be identified as "TA reader/graders." Personnel scheduled in that role are not allocated contact minutes. If a grader was initially scheduled as a teaching assistant his/her role should be changed to reader/grader, the contact minutes reduced to zero, and the contact minutes of other instructors adjusted to account for total contact time.

Personnel with only administrative responsibilities should also be scheduled in the appropriate role to avoid the allocation of contact minutes. These "administrators" and "supervisors" are not reported in CASA.

Time, Days and Location. Time, days and location should be entered when the schedule of classes is initially established. Missing data can be filled in when the data are opened for CASA editing.

Meeting location. Meeting location is recorded by providing a facility ID for each section, with different requirements for different types of sections and locations. A facility code corresponding to a building (such as a high school) or city/country combination (for international programs) must be identified for all sections not taught in Stony Brook facilities to record in PeopleSoft the detailed data required to meet requirements for reporting of off-campus activity to Middle States and the State Education Department.

- For regularly-scheduled sections in Stony Brook facilities a facility ID providing a building and room number must be identified. These are lecture, seminar, lab and recitation sections taught on the Stony Brook, Manhattan or Southampton campuses.
- For Stony Brook campus tutorial/independent study sections it is not necessary to provide a facility ID but one may be recorded.
- Tutorial/independent study sections taught at or through Manhattan or Southampton must have a facility ID identifying their location.
- For all off-campus regularly-scheduled and tutorial sections the facility ID for a specific location must be identified. It is not sufficient to enter the location OFC. If the off-campus location has not already been assigned a facility ID contact Barry Tobachnick to request the addition.
- Off-campus internships, practica, clinical sections, and student-teaching sections may be identified with the building OFC (S500000000). That building identifier may only be used for sections of that type, which occur in scattered locations and do not involve regularly-scheduled instruction.
- For distance-learning sections the facility ID should be ONLINE (S501000001). OFC indicates instruction at an organized off-campus site and should not be used for distance learning instruction.

Instructor contact minutes. In general, departments do not have to enter faculty contact minutes. Contact minutes are calculated from section start and end times and entered into the course schedule at the time of the enrollment snapshot (after 15 class days).

Tutorial contact times are not entered on the Meetings panel. They are calculated by formula when CASA data are finalized.

The number listed for “contact” on the Meetings page is the total number of class minutes per week. For example, 165 is shown for a class that meets for 55 minutes three times a week, and 160 for a class that meets for 80 minutes twice a week. These lengths are rounded in CASA reporting so that each of these courses is recorded as three faculty contact hours and three student contact hours.

Team taught courses. For courses with more than one instructor, total contact minutes are initially allocated evenly among all personnel scheduled as primary instructors, secondary instructors, or teaching assistants. Department staff should review the distribution and make changes to properly reflect the distribution of effort among instructors, keeping the total minutes the same. This editing should not be done until scheduling data are opened for CASA editing after the enrollment snapshot. Data entered earlier will be overridden by the automatic load.

In the screen shot example, the contact minutes show that Cabot is contributing 64% (102/160) of the teaching effort; McKinnon, 28% (45/160); and Rosati, 8% (13/160). If the course were taught by four instructors making equal contributions, a new row would be added for fourth instructor, and each would be assigned 40 contact minutes. The contact minute allocations must always add up to the original total, so in a 165 minute course taught equally by two instructors one should be assigned 83 minutes and the other 82 minutes.

Faculty contact minutes for team taught courses may exceed student contact time. If, for example, two instructors teach every class meeting together, total faculty contact minutes should be double the elapsed time of the class. Without that doubling their contact hours will be underreported in the Faculty Addendum. Regardless of the total, the distribution of faculty contact minutes should always reflect the distribution of faculty effort in the section because the primary use of faculty contact minutes in workload analysis is to distribute sections, students, and credits taught among instructors.

Cross-listed courses. The department responsible for scheduling a cross-listed course provides all the data required for CASA as if the course were not cross-listed. That department should not adjust faculty contact minutes to reflect the allocation of effort to the other parts of the cross-list. That adjustment is built into the CASA file processing.

For more help. Contact Richard Robinson (632-1589) for general information or assistance with complicated situations.