UVU

ACADEMIC SCHEDULING OFFICE

CourseLeaf CLSS

Instructions

December 2024

TABLE OF CONTENTS

Academic Scheduling
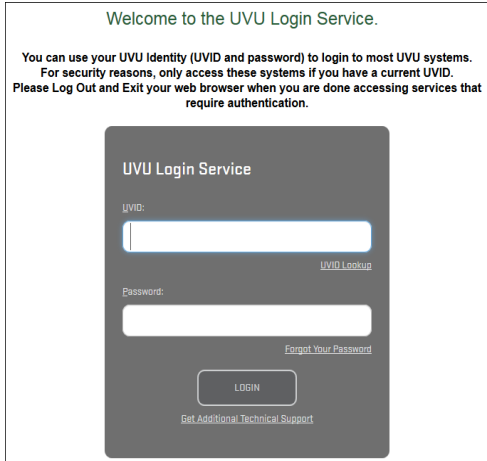## CLSS – *CourseLeaf Section Scheduler*

Introduction

CourseLeaf Section Scheduler (aka "**CLSS**") streamlines how departments prepare their class sections each term. This software allows authorized department schedulers to add, modify, and cancel sections from their semester schedules, and uses "phases" to permit or restrict (lock) those activities. In addition to section details, it displays semester, scheduling unit (department code), current phase, current mode, and key processing dates.

Navigation	**CourseLeaf CLSS,** *https://nextcatalog.uvu.edu/wen/* **CourseLeaf CIM,** *https://nextcatalog.uvu.edu/courseadmin/*
Resources	**Academic Scheduling,** *https://www.uvu.edu/academicscheduling/index.html* **CourseLeaf CLSS Help,** *https://luc.courseleaf.com/help/clss/* **Curriculum Office,** *https://www.uvu.edu/curriculumoffice/index.html* **UVU Course Catalog,** *https://www.uvu.edu/catalog/current/*

Terminology	**Instance –** The semester (term) being accessed (e.g., Spring 2024).
	
	 Scheduling Unit – The scheduling unit refers to your academic department code. Multiple subjects may be included in one scheduling unit.
	
	 Modes – There are two modes associated with CLSS: Design and Refine. UVU uses Refine mode only, which allows schedulers to submit individual section requests vs batch submissions.
	
	 Section – A single course offering (class) scheduled with an instructor.
	
	 Phases – Periods of time for scheduling a semester, which are defined as:
	
	      Phase 0 – Planning: Several months in advance of actual data entry, academic departments begin planning a new semester. To assist with this process, historical data is available in CLSS.
	
	      Phase 1 – Initial Review: Banner data is rolled (copied) from the previous like-semester *(e.g., Fall 2024 to Fall 2025)* and imported to CLSS. All **major** section changes, including the assignment of classrooms and/or labs *(where prescheduling authority exists)* <u>must</u> be submitted in Phase 1.

	Phase 2 – ASO Processing and Room Scheduling: The semester is temporarily locked to accommodate data review and processing, and automated room scheduling. Requests are <u>not</u> accepted during this phase *(includes CLSS, phone and email).* **Phase 3 – Final Review:** **Minor**, low-impact section changes can be requested *(subject to space availability).* High-impact requests require dean's office written approval and justification before processing. **Phase 4 – ASO Processing and Fee Review:** The semester is temporarily locked to accommodate data review and processing, which includes a course-based fee review. Requests are <u>not</u> accepted during this phase *(includes CLSS, phone and email).* *Banner student views open.* *Priority registration begins.* **Phase 5 – Publish:** Modify sections as enrollment numbers dictate. For example: cancel low enrolled sections, request enrollment increases, or create additional sections to support student demand. *Semester begins.* **Phase 6 – Archive:** Semester has ended. No changes can be accepted (includes CLSS, phone and email). However, the data remains viewable for historical comparisons.
SIS Rules	CourseLeaf CLSS has a series of inherent rules that are specific to the SIS (Banner) and include the following: **Section Numbers** - Each section of a course must have a unique section number. **Variable Credit Course** – The credit hours field must be populated with a number within the course level range in CourseLeaf CIM. **Canceled Sections –** Canceled sections do <u>not</u> have a meeting pattern, room assignment, or instructor assignment. **Instructor Assignments –** The value "Staff" cannot be selected as the Primary role instructor.

CLSS Navigation

1. Navigate to CourseLeaf CLSS. Login using your UVID credentials (and dual authentication), as needed.

The CourseLeaf CLSS - Instances "Welcome" screen will be displayed. For example:
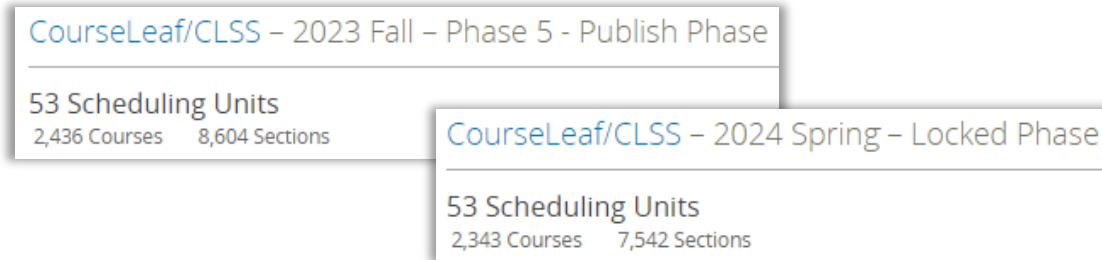
This screen includes:

- Current semester phases, descriptions, and strict deadlines.
- Important reminders and announcements.
- CLSS tips and help topics are accessed by clicking the "**?**" icon (top, right screen).

2. To begin editing your schedule, select the appropriate semester from the "Current" or "Future" list.

Current

2022 - 2023 AY	2023 - 2024 AY
2022 Fall	2023 Fall
2023 Spring	2024 Spring
2023 Summer	
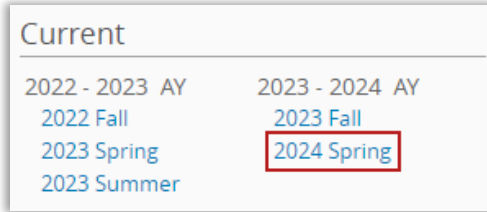
The semester selected will then be noted at the top of the next screen, along with the current phase. You can also see the number of scheduling units, courses, and sections that currently exist. For example:

CourseLeaf/CLSS – 2023 Fall – Phase 5 - Publish Phase

53 Scheduling Units
2,436 Courses   8,604 Sections

CourseLeaf/CLSS – 2024 Spring – Locked Phase

53 Scheduling Units
2,343 Courses   7,542 Sections

The scheduling unit list can be sorted by clicking any column heading. By default, CLSS will display alphabetically by "Name".

| ▲ ID	⇕ Name	⇕ Courses	⇕ Sections
acc	Accounting	17	38
actu	Academic Tutoring	0	0
ahlt	Allied Health	3	3
at	Automotive Technology	3	4
avc	Art and Design	24	72
avsc	Aviation Science	46	83
bcm	Literacies and Composition	2	18
besc	Behavioral Science	52	156
biol	Biology	30	86

Double-click on a scheduling unit to display all subjects and courses within that unit (or department) where sections currently exist.

> **Did You Know…?**
>
> If a particular subject and/or course does not appear in your list, it could mean:
>
> - the course is inactive,
> - the course has not reached the final level of approval in the curriculum process, *or*
> - no active sections currently exist for the course.

3. Once you've selected a scheduling unit, you'll see the following options (top, right):

| View By ▾ | ☑ Validate | ♨ Visualize | ▼ Filter | ⊞ Framer | Export ▾ |
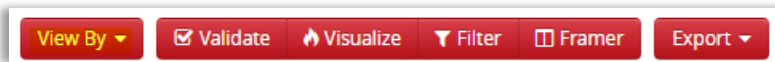
Selecting **View By** gives the option to list all available sections by:

…*Course*:

| ACC 2010 – Financial Accounting |
| ACC 2020 – Managerial Accountng |
| ACC 281R – Coop Work Experience |
| ACC 3000 – Fin Managerial Cost Concepts |
| ACC 3010 – Intermediate Accounting I |
| ACC 3020 – Intermediate Accounting II |

…*Day and Time*:

| Monday |
| Tuesday |
| Wednesday |
| Thursday |
| Friday |
| Saturday |
| > Does Not Meet |

…*Instructor:*

| Schmidt, Bunney (10009112) ↪ |
| Smith, Kevin (10580228) ↪ |
| Smith, Sheldon (10007550) ↪ |
| Staff ↪ |

…*or Room:*

| > Choose an Option ↪ |
| HP 128 ↪ |
| HP 136 ↪ |
| HP 141B ↪ |
| LA 110 ↪ |

4. To **ADD** a new section of a course, first double-click the appropriate subject and course number. The heading will expand to show all current sections. For example:

Did You Know…?

If you do not see the subject and course number desired, click the check box located at the top, right of your screen:
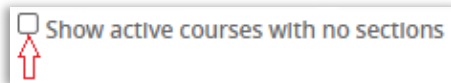
This will expand the list to include all active courses, *whether sections currently exist or not.*

5. To the right of each subject and course heading you will see the following icons:

 ==Use with extreme caution!== Clicking this icon will delete all current sections of the course from CLSS, and subsequently Banner. ***There is no way to retrieve them.*** Deleting sections is only an option in Phase 1—Initial Review.

 Click this icon to add a new section of the selected subject and course.

If the icons do not appear, check the top-left of your screen for the current semester **Phase** and **Mode**. For example:

A "**Locked**" phase indicates the semester data is not currently available for editing.
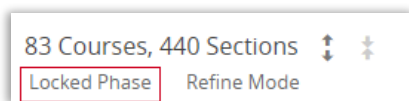
Adding a Course Section

> **Did You Know...?**
>
> As an authorized department scheduler, it is <u>your</u> responsibility to verify all data fields are correct. Review each section and **every field** for accuracy; modify as appropriate.

6. To add a new section of a subject and course, click the "**+**" icon next to the course number:

> ⟩ DENT 206G – Oral public health GI   ⊗ ⊕ ◄- - - - - - - - - - - -

The Create Section screen will open. For example:

Create Section – DENT 206G: Oral public health GI	⊕ ❓ ✕

Section Information   2023 Fall, ahlt

Title	Oral public health GI (Default Value) ⌄	Part of Term	Full Term (1) - 1 (8/23/23 to 12/16/23) ⌄
Section	002	Campus	M ⌄
Credit Hours	3	Instructional ...	Regular Class without Lab (LEC) ⌄
Status	Active ⌄	Visible	Yes ⌄
Special Approval	(None Assigned) ⌄	Schedule Type	Face to Face (F) ⌄
Grade Mode	Standard Letter ⌄	URL	
Final Exam	Y--Classroom/Lab is needed ⌄	Session	Afternoon ⌄
Cross-list With	Select section... ⌄	Restrictions	Level, Program ✎

Section Attributes ✎   **Course Attributes**
None Selected   GI - Global Intercultural

Instructor ✎   **Building and Room**   **Meeting Pattern**
Staff   Choose an Option ⌄   📅 Does Not Meet

Enrollment   0 current, 0 waiting   **Section Text (visible in student views)** ✎
Maximum   Waitlist Maxim...   *None Assigned*
[   ]   0

Comments (details for ASO only)
[   ]

TITLE

7. The first field, "**Title**", is automatically populated based on current curriculum. For example:

Title | Managerial Accountng (Default Value) ▼

- This field <u>cannot</u> be changed at the section level.

- Subtitles are <u>required</u> on topics course sections. Use the "Comments" field to request a subtitle to clearly identify the topic content.

? Did You Know…?

- The "**Title**" field is limited to 30 alpha-numeric characters and cannot include special characters (%, @, #, +, &, ", etc.). This limit includes transcript title, subtitle (if used), spaces and GE course indicators (e.g., BB, FF, HH, etc.).
- Subtitles provide truth in advertising for students as they plan their schedules and register for classes.
- Subtitles are required for "**Topics**" course sections, and sections that require a separation (e.g., instrument). Refer to the Academic Scheduling Guidelines for more information.
- Subtitles carry the same restrictions as a course transcript title (a total of 30 characters or less). For more information, contact the Curriculum Office.
- Academic Scheduling reserves the right to abbreviate the title and/or subtitle as necessary, while maintaining the integrity of the original title.

SECTION

8. The "**Section**" field allows for three alpha-numeric characters and is <u>automatically</u> populated with the next available number.

Section | 602

- The default number may not coincide with the section type being added (evening, internet, lab, etc.).
- Always review for accuracy and modify as appropriate.
- For section numbers that include alpha characters, use **UPPER CASE** letters only (i.e., "X14" vs "x14").

Refer to the Section Numbering website for alpha and numeric guidelines.

CREDIT HOURS

9. The **Credit Hours** field reflects the number of credits built into the course curriculum. This field can <u>only</u> be edited if the selected course includes a *variable* (range) credit ratio option (common to repeatable courses). For example:

Credit Hours   2 to 8

Enter the number of credits (within the available range shown) that apply to this section.

Because variable credit ratios must be manually entered in Banner, <u>always</u> use the **Comments** field to indicate the desired credit ratio for the section. For example:

If the course credit ratio range is:

CREDITS	LEC HOURS	LAB HOURS
1 *to* 4	0 *to* 4	0 *to* 12

You might request:

CREDITS	LEC HOURS	LAB HOURS
1	1	0
2	2	0
3	1	6
4	0	12

⚠️ **Caution!**

Credit ratio changes made to a course *prior* to the semester roll (copy) process are automatically reflected at the <u>header</u> (top) level of existing sections. However, they are NOT automatically applied to the meeting line level. This means additional changes may be necessary for active sections of the course including:

- credit ratio,
- schedule type,
- instructional method, and/or
- meeting pattern.

Know your course curriculum and review every section carefully.

STATUS

10. The **Status** field defaults to "Active" when creating a new section:

Status | Active ▼

Active
- Indicates the section is *(or will be)* active once saved.
- Section will roll (copy) to the next like-semester *(i.e., Fall 2023 to Fall 2024, etc.).*

Cancelled
- Indicates the section is *(or will be)* inactive/cancelled once saved.
- Section can be reactivated during a semester but *may be subject to space availability.*
- Section will <u>not</u> roll (copy) to the next like-semester.

SPECIAL APPROVAL

11. **Special Approval** indicators refer to a restriction placed on an individual section that prevents a student from registering without a manual system approval.

There are three distinct approval codes that can be placed on a section:

| Approval Code	Message Displayed to Student	Appropriate Use	Inappropriate Use
"DE"	Department Approval Required	• Independent Study • Research • Auditions • Professional level courses	• *Enrollment management* • *Reserving sections for online only programs.* • *Where Pre-/Co-requisites should be present in course curriculum.*
"IN"	Contact Internship Coordinator	Internships	*Any course not designated as an internship.*
"LR"	*Late Add—Must See Instructor*	***Automatically*** *applied when the late registration date is reached for a particular part of term code.*	*N/A*

By limiting the use of "department approval required" restrictions and changing the way approvals are granted, the university is removing enormous burdens on students and advisors.

Did You Know…?

"Department approval required" when written into your course curriculum has **NO AFFECT** on sections of that course unless the "Department Approval Required" code ("DE") is manually placed on every section by the authorized scheduler in CourseLeaf CLSS.

GRADE MODE

12. The **Grade Mode** options listed in the drop-down menu depend on the curriculum design of the course. In most cases, "Standard Letter" will be the only option available.
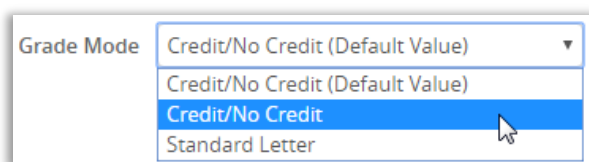
Select the appropriate option for the section.

> **⚠️ Warning!**
>
> Changing the Grade Mode <u>after</u> students have registered for the section <u>will</u> impact how students can be graded. A change will require timely coordination with the Registration Office to un-enroll / re-enroll those students to correctly apply the new grade mode.
>
> Late requests (within 3 weeks of a class end date) may not be possible. ***Plan ahead!***

FINAL EXAM

13. To indicate the **Final Exam** intent, select the appropriate option from the drop-down menu:

Final Exam | Y--Classroom/Lab is needed
Y--Classroom/Lab is needed
N--Classroom/Lab is NOT needed

Select "**Y**" if a Final Exam space (classroom or lab) will be needed for this section.
Select "**N**" if a physical space is not needed (i.e., exam is project-based, held online, etc.).

> **❓ Did You Know…?**
>
> Indicating the intent correctly in CLSS now will assist in the Final Exam conflict resolution process later.

CROSS-LISTING

> **❓ Did You Know…?**
>
> There are three distinct types of cross-listing, and each carries its own restrictions:
>
> - SIS (Banner)--**course** level,
> - SIS (Banner)--**section** level, *and*
> - **LMS** (Canvas)--section level.
>
> *Refer to the Academic Scheduling Guidelines for more information.*

14. The **Cross-list With** feature allows you to request cross-listing one section with one or more related sections. Simply enter a subject and/or course number to begin a search:

By selecting a section from the list, you are *giving control* of the cross-list pairing to another section. That section becomes the "**controller**" of your section information upon saving.

A ribbon message at the top of cross-listed sections will reflect which section controls the primary scheduling for the cross-listed pairing. For example:

- The "**controlling**" section controls/manages most of the information for the cross-listed pairing.

- The "**controlled**" section can control/manage information that is unique to the cross-listed portion (e.g., cross-list maximum enrollment).

- If you are creating a **new** cross-list pairing, the Cross-list Maximum Enrollment field will <u>not</u> be visible until the request has been processed. Use the Comment field to inform the Academic Scheduling Office as to what the cross-list maximum should be in Banner.

- For **existing** cross-listed sections, the Cross-list Maximum Enrollment field will be visible. When changing the section Maximum Enrollment, you may need to edit this field as well.

- When cancelling a cross-listed section, *ALL sections in the group will be cancelled!*

⚠️ **Caution!**

CLSS may display the following message at the top of the section editor screen:

> ❶ This section has features that cannot be edited in CLSS. Changes to this section must be made directly in Banner by ASO.

When a cross-listed pairing cannot be edited, it is "unbridgeable" and <u>cannot</u> sync with Banner. This is common when critical fields (e.g., Schedule Type) do not match on all sections in the pairing. If this happens, email the Academic Scheduling Office for assistance.

PART OF TERM

15. Next, select the appropriate **Part of Term** code from the drop-down menu:

Part of Term	Full Term (1) - 1 (8/23/23 to 12/16/23)
	Full Term (1) - 1 (8/23/23 to 12/16/23)
	Block 1 First 7 1/2 weeks (B1) - B1 (8/23/23 to 10/10/23)
	Block 2 Second 7 1/2 weeks (B2) - B2 (10/11/23 to 12/8/23)

Your selection will determine the:

- number of weeks the section will be scheduled,
- minimum hours per week required,
- meeting pattern options available, *and*
- final exam scheduling.

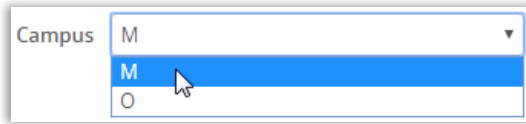For current dates, refer to the Student Dates & Deadlines website.

❓ **Did You Know…?**

- Part of term codes are used to capture specific start and end dates of a semester and are in accordance with UVU's official Academic Calendar.

- Each code includes "behind the scenes" dates that regulate registration, add/drop/withdrawal periods, tuition and fee assessment, late registration, final exams, Student Rating of Instructor (SRI) periods, grading, and more!

- Sections created using a Miscellaneous part of term code are **unique to each semester and year** they're created for and do <u>not</u> copy to the next like-semester.

- For more information, refer to the Academic Scheduling Guidelines.

16. Select the appropriate **Campus** (Budget) code from the drop-down menu:

Campus	M ▼
	M
	O

"**M**"   Indicates tuition <u>and</u> student fees will be assessed.

"**O**"   Indicates tuition <u>only</u> will be assessed (excludes student fees).

> **?** **Did You Know…?**
>
> - The "**Campus**" (Budget) code **does <u>not</u> indicate** where a section will be taught. *It is used for budgeting purposes only.*
> - Always refer to the Academic Scheduling Rules to identify the coding requirements of your specific program and/or section delivery method.
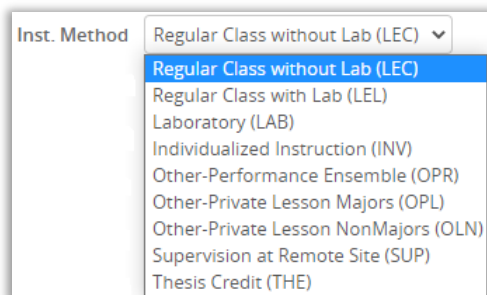
> **⚠ Warning!**
>
> Changing the "**Campus**" (Budget) code **after students have registered** <u>will</u> impact their registration fee assessment <u>and</u> will require the Registration Office to un-enroll / re-enroll students to correctly re-assess the charges.

INSTRUCTIONAL METHOD

17. The **Instructional Method** indicates the type of instruction or method by which organized instruction is conducted. Select the appropriate code from the drop-down list:
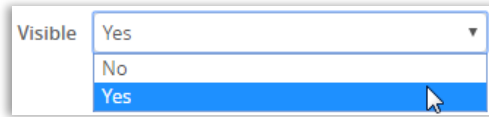
Inst. Method	Regular Class without Lab (LEC) ▼
	Regular Class without Lab (LEC)
	Regular Class with Lab (LEL)
	Laboratory (LAB)
	Individualized Instruction (INV)
	Other-Performance Ensemble (OPR)
	Other-Private Lesson Majors (OPL)
	Other-Private Lesson NonMajors (OLN)
	Supervision at Remote Site (SUP)
	Thesis Credit (THE)

- Your selection must accurately reflect how the class will be conducted, as defined by USHE guidelines. Refer to the Instructional Methods website for more information.

- **Always review for accuracy** and modify as appropriate. This code offers truth in advertising for students as they plan their schedules and register for classes.

18. The **Visible** field drives which sections can be seen in student views. Select "Yes" from the drop-down menu to make a section visible to students for registration.

When a section is not visible, the academic department will still be able to see the section in myUVU (Banner Services), but it will be 'greyed out' as an indicator of no student visibility.

(?) Did You Know…?

All sections are hidden from student views (field is locked) until **Phase 5** - **Publish**. Sections can be **hidden** from student view and registration by request from an authorized scheduler. However:
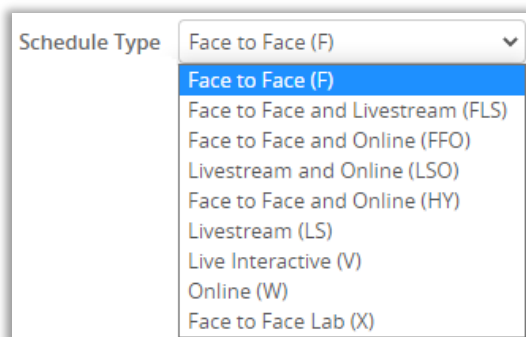
- the general classroom or lab assignment will be forfeited,
- the maximum enrollment will be decreased to "0", and
- the instructor assignment will be removed.

Making the section **visible** to students and open for registration later is subject to:

- space availability, and
- the maximum capacity of the available space.

SCHEDULE TYPE

19. The **Schedule Type** code (aka "delivery method", "modality") indicates the primary way a course section will be taught. Select the appropriate code from the drop-down list:

- Your selection must accurately reflect how the class will be delivered, as defined by USHE guidelines. Refer to the Schedule Type website for more information.

- **Always review for accuracy** and modify as appropriate. This code offers truth in advertising for students as they plan their schedules and register for classes.

URL

20. The **URL** field is locked to scheduler editing. If a URL has been assigned to the section by ASO, it will be displayed here. For example:

| URL | https://www.uvu.edu/concurrent/ |

This information is visible to students during planning and registration.

SESSION

21. The **Session** code indicates the time of day a section begins. Select the appropriate code from the drop-down list:

Session	(None Assigned) ▼
	(None Assigned)
	Morning
	Afternoon
	Evening
	Not Applicable

Morning   *class begins before* **1200** *(0600-1159)*
Afternoon   *class begins before* **1700** *(1200-1659)*
Evening   *class begins @ 1700 or later*
Not Applicable   *for sections with no meeting pattern (i.e., online, internships, etc.)*

22. Where registration restrictions exist in the course curriculum, they automatically copy to the section level and are displayed in the **Restrictions** field:

> Restrictions Field of Study - Major, Level, Program

This field is locked to editing; however, you can click on any restriction for more information. For example:

Section Restrictions

Current Restrictions

Field of Study - Major to **INCLUDE**
END - Endorsement-Education
PBE - Post Bac Education

Level to **EXCLUDE**
CE - Continuing Education

Program to **EXCLUDE**
HSCE - High School Concurrent Enroll

Classification: *None*

Degree: *None*

Department: *None*

Field of Study - All
Not available when Field of Study - Concentration, Field of Study - Major *or* Field of Study - Minor *restrictions are defined*

Field of Study - Concentration: *None*

Field of Study - Minor: *None*

Student Attribute: *None*

✖ Cancel

Requests to **change** a course restriction must be submitted via CourseLeaf CIM.

Contact the Curriculum Office if a **correction** is necessary.

Contact the University Curriculum Committee representative for your school/college for more **information**.

? **Did You Know…?**

Sections that exist for special programs (i.e., non-resident students) may see additional restrictions. Refer to Academic Scheduling Rules for more information.

COURSE ATTRIBUTES

23. GE distribution, Essential Learning Outcomes, approved course-based fees, Canvas materials charges, and other codes are displayed in the **Course Attributes** and **Section Attributes** fields. For example:

Section Attributes
Course fee of $10 applies
GI - Global Intercultural
Lab access fee of $45 applies

Course Attributes
Course fee of $10 applies
GI - Global Intercultural
Lab access fee of $45 applies

Course Attributes are built into the curriculum and cannot be adjusted at the section level.

GE distribution codes aid students and transfer institutions by identifying how courses meet graduation requirements, and how they apply to the Associate in Arts / Science Degrees and Bachelor of Arts / Science Degrees. For example:

AS	American Institutions	**LH**	Foreign Language
BB	Biology	**PP**	Physical Science
CC	English Composition	**QL**	Quantitative Literacy
FF	Fine Arts	**SS**	Social Science

SECTION ATTRIBUTES

Did You Know…?

Some programs may require adding/removing codes at the section level based on Academic Scheduling Rules for the current academic year. These requirements are processed by the Academic Scheduling Office prior to student registration.

24. Additional (limited) codes can be added to (or removed from) a section to denote a specific offering. To add or remove a section attribute code, click the ✎ icon next to the Section Attributes heading:

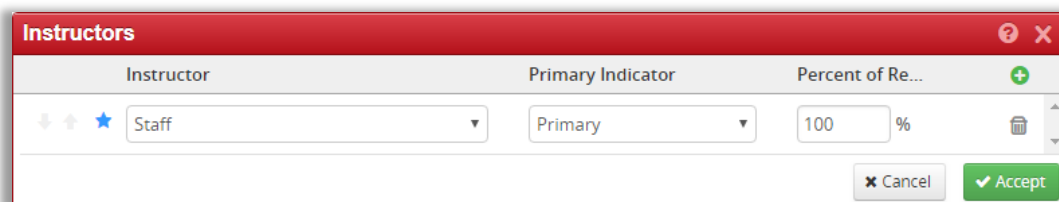The Section Attributes box will open. Click the ➕ icon to open the list of options:
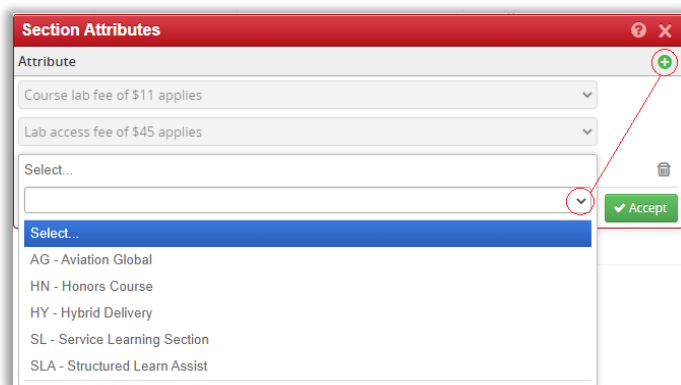
Select the appropriate code from available options, then click **Accept** to save your work.

25. To assign an **Instructor** to a section, first click the 🖊 icon next to the Instructor field:

Instructor
Staff

…which will open the "**Instructors**" box:

The "**Staff**" listing, in this case, simply means no instructor has been assigned to the section. Multiple instructors can be assigned; however:

• only one instructor can be marked as "Primary", and

• where multiple instructors exist, the combined assignments must total **100%**.

❓ **Did You Know…?**

○ **Instructional Assistants** paid as a part-time employee by the academic department must be listed on the appropriate section(s) in Banner at "**0%**" responsibility.

○ Grades can only be entered by the *primary instructor* noted on the course section.

○ All instructor assignments must be recorded in Banner <u>before</u> third week reporting and USHE review each semester.

○ For more information, refer to "**How do I Activate an Instructor?**" from the Academic Scheduling <u>Frequently Asked Questions</u> website.
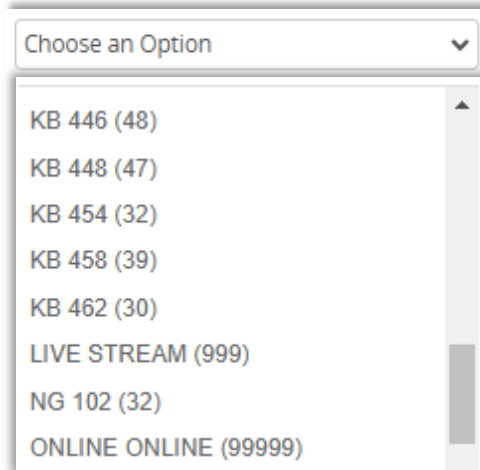

⚠ **Warning!**

The Instructor Verification tool (myUVU > Banner Services) **closes** two weeks <u>prior</u> to the end of a semester. Late changes cannot be accommodated. ***Plan ahead!***

If an instructor has not been assigned by the deadline, grades must be submitted to the Registration Office via the Grade Change form. Refer to <u>Faculty and Staff Resources</u> for more information.

26. To request a **Building and Room** for a section, click the drop-down list arrow to view the available options. For example:

Choose an Option
KB 446 (48)
KB 448 (47)
KB 454 (32)
KB 458 (39)
KB 462 (30)
LIVE STREAM (999)
NG 102 (32)
ONLINE ONLINE (99999)

This list will vary based on department code and approved pre-scheduling authority. Before selecting a building and room, verify the maximum enrollment limit of the section does not exceed the maximum capacity of the room.

If you do not see the desired space in the list, select "**General Assignment Room**", *and* enter the building and room request in the **Comments** field.

ASO will honor requests based on ADA status, approved prescheduling authority, max room capacity and space availability. For more information, email the Academic Scheduling Office.

USHE policy R751, Facilities Space Utilization, for classroom and laboratory space assignments. It includes standards for station occupancy (based on room capacity) which UVU is required to report. The standard for classrooms is **66.7%** occupancy* of the room's capacity; laboratory space is **80%** occupancy* of the room's capacity.

Occupancy is equal to actual enrollment, not maximum enrollment.

⚠️ **Caution!**

- All faculty members with an ADA accommodation (documented through the Accessibility Services office) that require a specific building/room assignment should be assigned to sections and spaces during **Phase 1 -- Initial Review** of the scheduling process.

- **Do not** select "TBA" for sections that require a classroom or lab assignment! Doing so prevents a space from being assigned in the batch room scheduling process.

Did You Know…?

"**General Assignment Room**" is appropriate for sections held in university-controlled space where pre-scheduling authority does <u>not</u> currently exist.

"**LIVE STREAM**" is used with Schedule Types:

- **LS** (Livestream) sections where lecture is held live on specific days and times using MS Teams (no physical classroom space is scheduled), *and*
- **LSO** (Livestream + Online) sections for the livestream meeting line only.

"**ONLINE ONLINE**" is used with Schedule Types:

- **FFO** (Face to Face + Online) sections for the online meeting line only (where no meeting pattern is assigned),
- **LSO** (Livestream + Online) sections for the online meeting line only (where no meeting pattern is assigned),
- **W** (Online) sections where <u>all</u> content is offered online (no face-to-face time).

"**TBA TBA**" can be used (where appropriate) for:

- Coop work experience	- Performance ensembles	- Student teaching
- Independent study	- Private lessons	- Study abroad

ROOM SEEK

Did You Know…?

- The Room Seek tool is only available in **Phase 5 - Publish** of the scheduling process.

- A search will be run against all available spaces your department can request (general classrooms and dedicated labs) in Phase 5 – Publish.

27. The **Room Seek** feature is accessible from three different locations in CLSS.
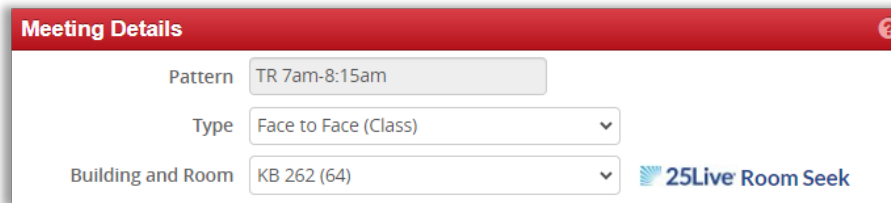
   a) From the **Edit Section** form with the "**Room**" field:
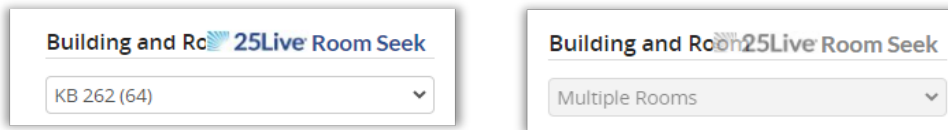
   b) From the **CourseLeaf Snapper** (bottom left of the window):

   c) From the **Meetings Details** screen (this is the only location 25Live Room Seek can be accessed for sections with multiple meeting lines):

   Room Seek tool will check all meeting days for the entire range of dates (part of term) the section runs and display a results screen.

   ⚠️ **Warning!**

   The black ⬚ **Debug** button in the bottom right is for CourseLeaf support personnel and the Academic Scheduling Office <u>only</u>. This shows if the system is working properly and is used by our offices to investigate issues.

28. The data points CLSS uses for a space search appear at the top (highlighted in gray) including meeting pattern, part of term dates, and max enrollment.

   Rooms available on **all dates** that meet the criteria specified for the search appear on the **Available, Meets All Criteria** tab (sorted by closest max room capacity match).
   For example:

To request a room, click the green **Select** button next to the room. Remember to click "**Save**" to confirm your selection and **Start Workflow** as usual.

When requesting a room, always be mindful of utilization requirements.

? Did You Know…?

- Availability does <u>not</u> guarantee actual assignment. Rooms are only assigned once you receive a confirmation email from the Academic Scheduling Office.

- Each available room is hyperlinked to its location details page in **25Live**, including pictures, calendar details, a full list of features, and more.

- The **Room** and **Capacity** columns can be resorted by clicking the outer-facing arrows.

29. Rooms available on all dates where the **max capacity** is <u>lower</u> than the **max enrollment** set for the section will appear on the | **Available, Criteria Not Met** | tab. For example:

25Live Room Seek				❓ ✕
ACC 2110-001: Principles of Accounting I (CRN: 34469; CLSS ID: 5135)				
Campus: M	**Meets:** TR 7am-8:15am 8/21/2024 - 12/13/2024	**Enroll Max:** 60	**Room Features:** *None*	

Available, Meets All Criteria	**Available, Criteria Not Met**	Not Available		
	Room ⇕	Capacity ⇕	Deficit ▲	Missing Features ⇕
Select	BA 204	59	1	-
Select	CB 414	56	4	-
Select	SB 279	56	4	-
Select	CB 301	55	5	-
Select	CB 404	55	5	-
Select	CB 406	55	5	-
Select	CB 416	55	5	-
Select	CB 417	55	5	-
Select	CB 512	55	5	-

⚒ Debug   ✕ Cancel

To request a room, click the green **Select** button next to the room. Remember to click "**Save**" to confirm your selection and **Start Workflow** as usual.

- Available rooms can be requested IF the section's max enrollment is lowered.

- In addition to "Room" and "Capacity" you can also sort by "**Deficit**" to show the spaces with the closest match.

30. Rooms that are <u>not</u> available for one or more dates appear on the Not Available tab and cannot be requested. For example:
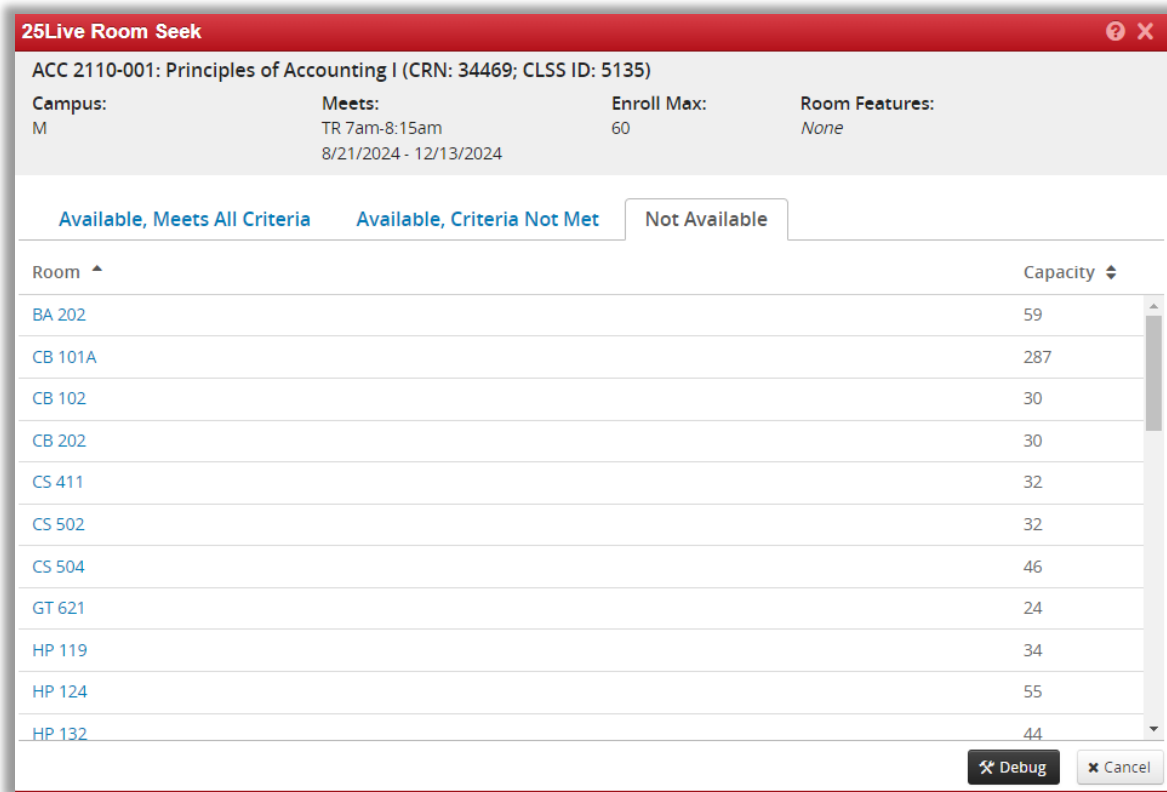

- This list helps you identify the spaces you may prefer and could possibly do an internal room swap. Direct links to the space details page in 25Live can help you search for specific details for that space.
- Spaces are sorted alphabetically by "Name" but can be sorted by "Capacity" as well.
- Campus holidays have been excluded from the search and will not create a conflict.
- If a room is available on all dates, the enrollment max will be used next to determine which "Available" category a room is placed under.

MEETING PATTERN

31. To add a **Meeting Pattern** to a section, click the "Does Not Meet" link:
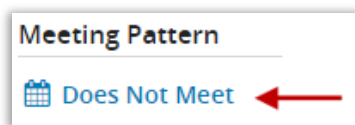
The **Scheduling** screen (referred to as the "Snapper") is then displayed. The number of sections that currently exist for this course will determine what is displayed. For example:
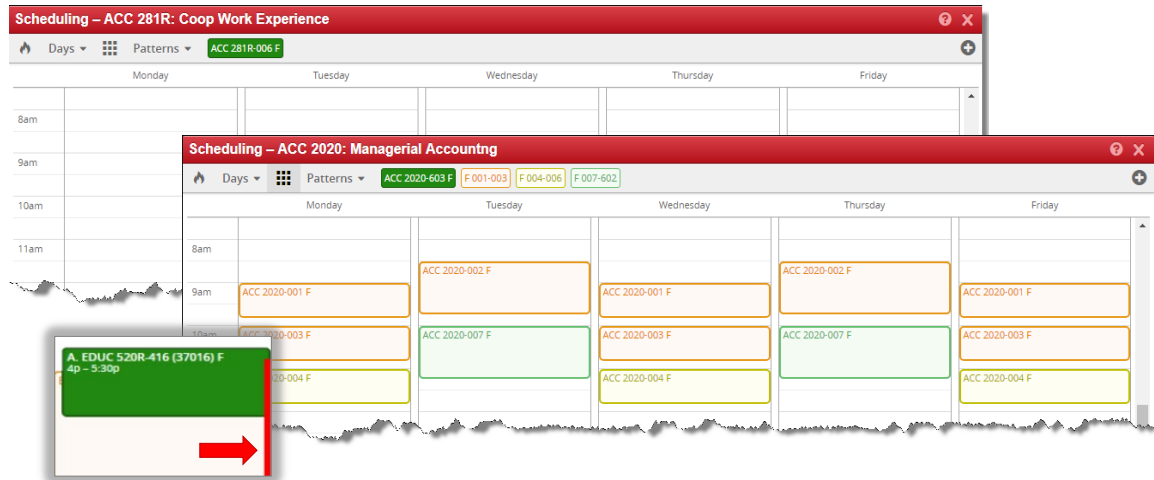
Where vertical **red** *lines are visible, a* **Primary Instructor** *conflict exists.*
Note: *CLSS does not currently identify the specific details of each conflict from the Snapper.*

The top of the screen includes the following icons:
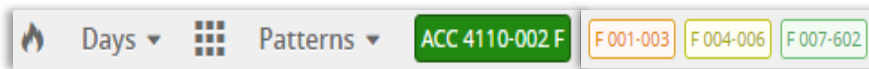
…which reference:

|	
	"Heatmap" view
Days	Days of the week to display on the snapper screen.
Patterns	Includes a list of standard meeting patterns and a "user defined" option (subject to workflow approvals).
	Current section (where "F" indicates the Schedule Type selected).
	Existing sections of the same course.

❓ **Did You Know…?**

The "snapper" shows the section currently being scheduled plus related sections. The snapper is so named because when hovering over the time grid, CLSS will attempt to "snap" the section into a pre-defined, standard meeting time.

---

32. Many times, it is necessary to include <u>multiple meeting lines</u> on a section to capture the online or livestream portion of a hybrid-type section delivery, or to reflect separate lab time, field excursions, etc.
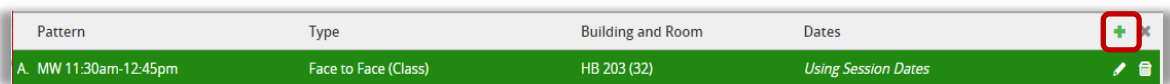
To add an additional meeting line to a section, first click the current meeting pattern under **Schedule**. For example:
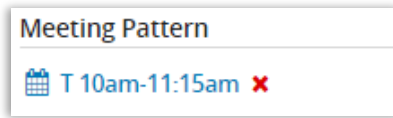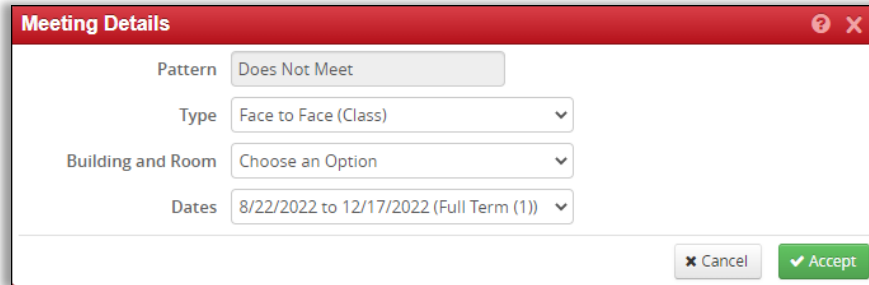

When the Schedule "snapper" screen opens, click the **Meetings** button located in the bottom left corner:
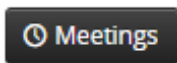
From the meeting line screen, click the **+** sign in the right-hand corner:

The **Meeting Details** window will then be displayed. For example:

- Select a **Type** code from the drop-down list (all meeting line "types" must <u>match</u> the Schedule Type code selected in Step 19 above).

- Choose a **Building and Room** assignment.

- To indicate a field trip or excursion on specific dates, select "Custom" from the **Dates** drop-down list:
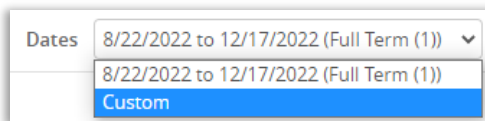
…which opens new fields where the beginning and ending dates can be entered:
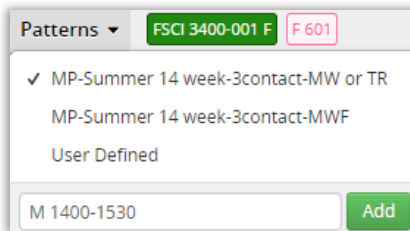
08/22/2022 📅	to	12/17/2022 📅

Do NOT adjust the meeting line dates for any other reason without permission from the Academic Scheduling Office.

Once the necessary changes have been made, click **Accept**. The screen will refresh and display the additional meeting line:

Pattern	Building and Room	Dates	+ ×
W 2pm-5:20pm	ME 136 (12)	*Using Session Dates*	✏ 🗑
Does Not Meet	General Assignment Room	*Using Session Dates*	✏ 🗑

To assign a meeting pattern to the new meeting line, *single click on that line*. The Meeting Line screen will disappear.

33. Next, click the **Patterns** tab at the top of the Scheduling "snapper" screen. Select a standard meeting pattern from the list or use the "**User Defined**" field to manually enter a meeting pattern. For example:
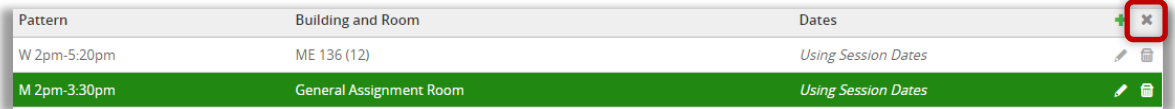
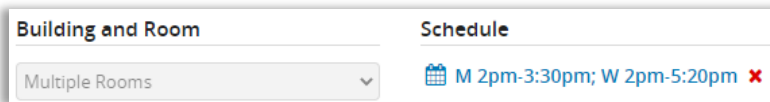| Patterns ▾	FSCI 3400-001 F	F 601
✓ MP-Summer 14 week-3contact-MW or TR		
MP-Summer 14 week-3contact-MWF		
User Defined		
M 1400-1530		Add

Click **Add** to save the entry. The new meeting line will now show the new meeting pattern:

Pattern	Building and Room	Dates	+ ×
W 2pm-5:20pm	ME 136 (12)	*Using Session Dates*	✏ 🗑
M 2pm-3:30pm	General Assignment Room	*Using Session Dates*	✏ 🗑

Click the "**X**" in the top right of the Meetings window.
Click **Accept** in the bottom right of the Scheduling "snapper" screen to save your work.

Both meeting times will show in the Schedule field:

Building and Room	Schedule
Multiple Rooms ⌄	📅 M 2pm-3:30pm; W 2pm-5:20pm ✕

The Building and Room field will now reflect "**Multiple Rooms**". To edit the building and/or room for either meeting line, return to the black **Meetings** button in the Scheduling "Snapper" view and edit as shown in Step 32.

34. Click the 📍Rooms button in the Scheduling "Snapper" screen (bottom, left) to show current room availability based on the meeting line selected in the previous step.

    From the **Room Grid** screen, all classrooms and lab spaces that can be prescheduled by your department will be displayed. For example:

    This display will help with room availability questions as you adjust your semester schedule.

ENROLLMENT

---

35. **Enrollment Maximum** field reflects the total number of students allowed to register for the individual section. For example:

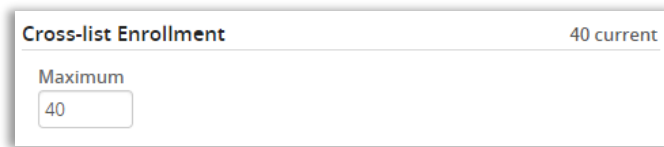   The **Waitlist Maximum** must <u>match</u> the Enrollment Maximum *up to 25 students*. Larger sections should reflect:

    • Enrollment Maximum between 26 and 99: Waitlist Maximum = **25**
    • Enrollment Maximum of 100+: Waitlist Maximum = **50**

    Approved exceptions include:

    • Lab sections with a co-requisite lecture: Waitlist Maximum = **0**
    • High School Concurrent Enrollment: Waitlist Maximum = **0**

36. When a section is cross-listed, you will also see the **Cross-list Enrollment Maximum** field:

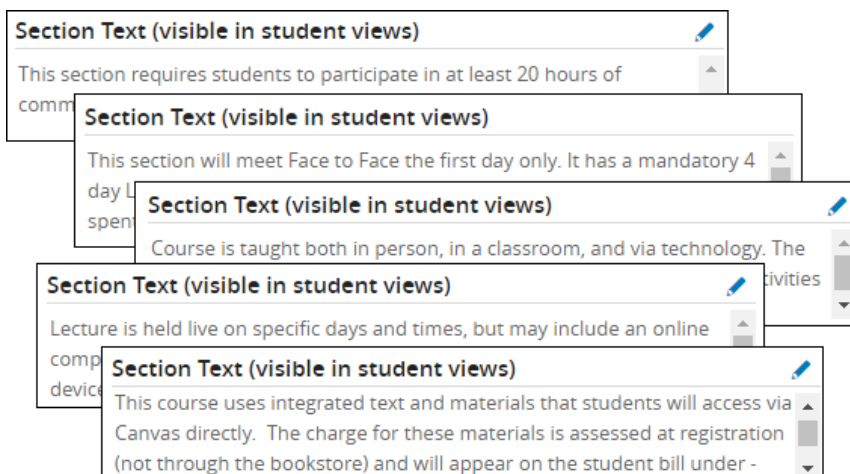Cross-list Enrollment   40 current

Maximum
40

This field must reflect either:

- the Enrollment Maximum of each section **combined** (e.g., 20 + 10 = <u>30</u>), *or*
- the Enrollment Maximum of <u>each</u> section is **the same** (e.g., 30 + 30 = <u>30</u>), *and*
- the Cross-list Enrollment Maximum is **the same**.

SECTION TEXT

37. The **Section Text** field is <u>visible to students</u> during registration and should be used to notify students of important section information. For example:

Section Text (visible in student views)

This section requires students to participate in at least 20 hours of comm...

Section Text (visible in student views)

This section will meet Face to Face the first day only. It has a mandatory 4 day L... spen...

Section Text (visible in student views)

Course is taught both in person, in a classroom, and via technology. The ...ivities

Section Text (visible in student views)

Lecture is held live on specific days and times, but may include an online comp... devic...

Section Text (visible in student views)

This course uses integrated text and materials that students will access via Canvas directly. The charge for these materials is assessed at registration (not through the bookstore) and will appear on the student bill under -

A list of standard/common section notes is available in the Academic Scheduling Rules.

COMMENTS

38. The **Comments** field is used to notify the Academic Scheduling Office of important section information and includes (but is not limited to):

- scheduling rule followed
- variable credit to apply (include <u>credit</u> hours, <u>lecture</u> hours, and <u>lab</u> hours)
- subtitle for Topics course
- miscellaneous part of term dates
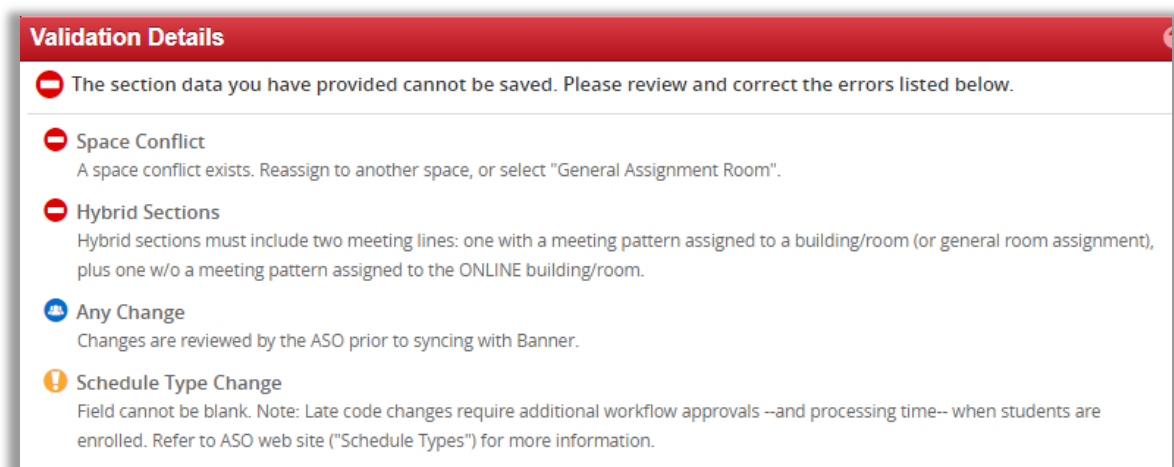- justification of change to aid dean's office approval

For example:
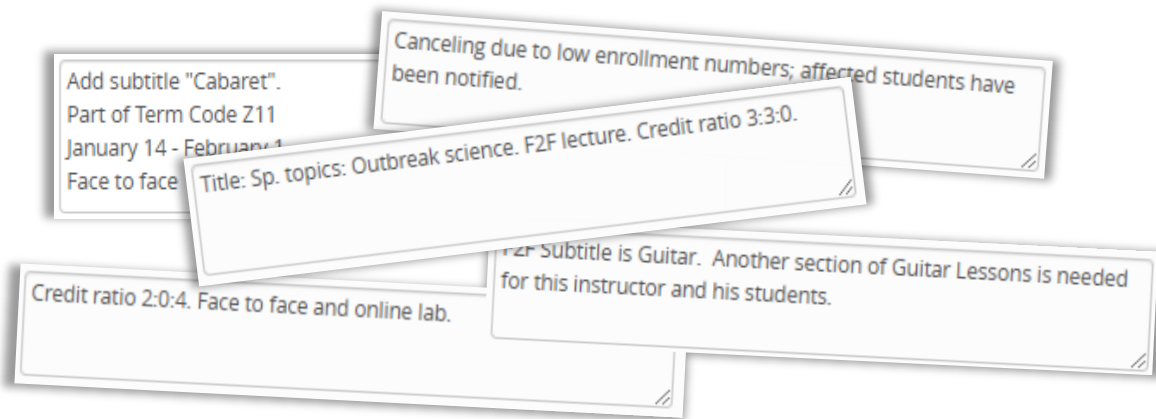
SAVE SECTION

39. Once all fields have been reviewed for accuracy, click "**Save Section**" to save your work (bottom, right of screen):
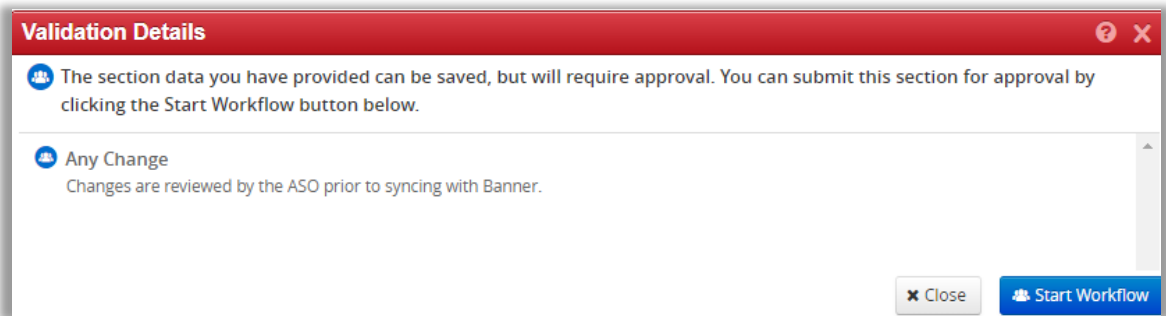

VALIDATION DETAILS

The section will automatically begin validating against established scheduling rules. CLSS will display the results in a "**Validation Details**" screen. For example:

Validation Details

🚫 The section data you have provided cannot be saved. Please review and correct the errors listed below.

🚫 **Space Conflict**
A space conflict exists. Reassign to another space, or select "General Assignment Room".

🚫 **Hybrid Sections**
Hybrid sections must include two meeting lines: one with a meeting pattern assigned to a building/room (or general room assignment), plus one w/o a meeting pattern assigned to the ONLINE building/room.

🔵 **Any Change**
Changes are reviewed by the ASO prior to syncing with Banner.

⚠️ **Schedule Type Change**
Field cannot be blank. Note: Late code changes require additional workflow approvals --and processing time-- when students are enrolled. Refer to ASO web site ("Schedule Types") for more information.

⛔	**Errors**	• The section <u>cannot</u> be saved as-is. The error description will provide the rationale and possible solutions. • The **Save As-Is** and **Start Workflow** buttons will <u>not</u> be available. • ***Errors <u>must</u> be corrected before continuing***.
⚠	**Warnings**	• Caution should be taken before saving as-is and submitting to workflow. The warning description will provide rationale and possible solutions. • The **Save As-Is** button is available if no errors are present. • ***Warnings <u>should</u> be corrected before continuing***.
👥	**Workflow**	• The section may be saved as is. The workflow description will provide the rationale. • Review and approval by ASO is required before the section will appear in the SIS (Banner). • The **Start Workflow** button is available.

Once the necessary corrections have been made, click **Save Section** again. The "**Validation Details**" screen is now free from errors and warnings:

Validation Details ❓ ✕

👥 The section data you have provided can be saved, but will require approval. You can submit this section for approval by clicking the Start Workflow button below.

👥 Any Change
Changes are reviewed by the ASO prior to syncing with Banner.

✖ Close   👥 Start Workflow

Click **Start Workflow** to submit your request to the Academic Scheduling Office for review and processing.

❓ **Did You Know…?**

• All submissions are reviewed for accuracy prior to syncing with Banner.

• Incorrect submissions will be rolled back to the department for corrections.

• Changes will <u>not</u> appear in Banner until they have been reviewed, approved, and processed by the Academic Scheduling office.

---

40. To check the processing status of a section, select it from your department list:

If you see a yellow ribbon at the top of the "**Edit Section**" screen, the section is currently in Workflow. For example:

To see which workflow step your section currently resides, click the red "**Workflow Status**" button (bottom, right of screen):

…and the "**In Workflow**" window will be displayed:

- **Academic Scheduling** = ASO queue for review, approval, and processing. Additional changes can be made by the original requester until the section is fully processed by ASO or has been rolled back for corrections.

- **Banner** = Section could not sync ("bridge") to Banner and may be rolled back for corrections. *"Banner" does not mean the request has been processed!*

Modify Existing Sections

EDIT

41. To **EDIT** an existing section:

- Select the section from your department list.
- Make the appropriate changes.
- Review all fields for accuracy.
- Click **Save Section** to save your work.
- Verify there are no errors or warnings to correct from the "Validation Details" screen.
- Click **Start Workflow** to submit to Academic Scheduling for review, approval, and processing.

CANCEL

42. To **CANCEL** an existing section where registered students must be moved to an **identical** section, **FIRST** email the **Registration** Office (cc the Academic Scheduling Office) and include the following information:

	Move students FROM:	Move students TO:
Semester code	202540	202540
CRN	12345	10077
Subject code	BIOL	BIOL
Course #	1010	1010
Section #	X08	X07
Student names & UVIDs	Lexi Test, 45678901 Tyler Test, 32145987 Tom Test, 12345678	

The Registration office can move the students between the identical sections and will confirm via email when complete. You can then continue to the next step.

> ⚠️ **Warning!**
>
> ***Do not*** submit a cancellation request in CLSS *before* the Registration office has moved the students to the requested section. If the cancellation is processed first, the students will automatically be dropped from the section which can negatively impact their schedules, financial aid, and more! *The request to move students then becomes a request to re-register them.*

> **?** **Did You Know…?**
>
> Cancellation of high-enrolled sections where the actual enrollment exceeds 50% of a section's maximum enrollment, or 10+ students (whichever is greater) is considered a **high-impact** request and requires dean's office approval to process.

43. Select the section to cancel from your department list and make the following changes:

- Change **Status** field to "Cancelled".

  | Status | Cancelled ▼ |

- Change **Visible** field to "No".

  | Visible | No ▼ |

- Remove the meeting pattern by clicking the **X** icon next to the pattern:

Building and Room	Meeting Pattern
KB 302 (58) ▼	📅 T 6pm-8:30pm ⊗

  …which <u>automatically</u> removes the building and room assignment:

Building and Room	Meeting Pattern
Choose an Option ▼	📅 Does Not Meet

- Remove the assigned Instructor and replace with "Staff":

Instructor
Staff

- Click "**Save Section**" to save your work. Verify there are no errors or warnings to correct from the Validation Details screen.

- Click "Start Workflow" to submit to Academic Scheduling for review, approval, and processing.

> ⚠ **Caution!**
>
> Students are <u>automatically</u> dropped from the section when the Academic Scheduling Office processes the cancellation request.
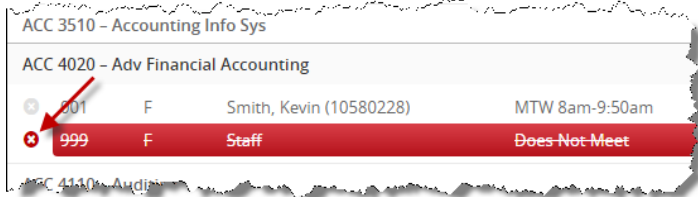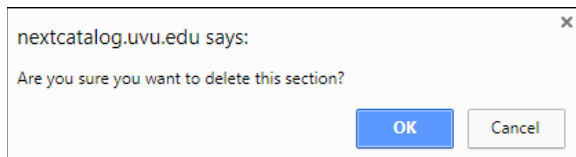
> **?** **Did You Know…?**
>
> Cancelled sections can be <u>reactivated</u> during the semester but *may be subject to classroom or lab availability*.

44. To delete a single section of a course, select it from your department list. Click the "**X**" icon next to the section number. For example:

When prompted to confirm the action, click "**OK**".

The section will be deleted from both CLSS *and* Banner.

? **Did You Know…?**

Course sections can only be deleted in **Phase 1 – Initial Review**.

⚠ **Warning!**

To delete <u>all</u> sections of a subject and course, click **X** in the top, right corner of the screen. You will be prompted to confirm. If this action is performed in error, the sections **cannot** be recalled for you, as they are also deleted in Banner.
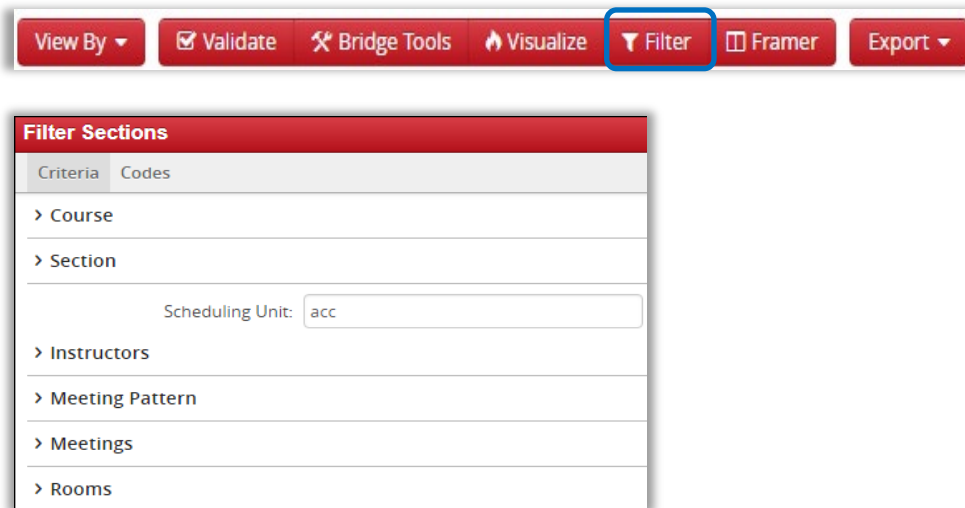
Planning and Reporting Tools

45. CLSS planning and reporting tools are located at the top, right corner of your department's Course Sections page. For example:
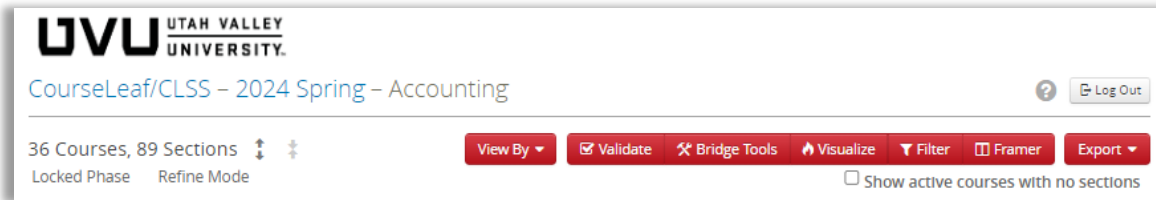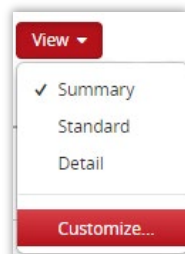

The **FILTER** tool can be used to find course sections containing specific data (e.g., Schedule Type, Instructional Method, room assignment, etc.).
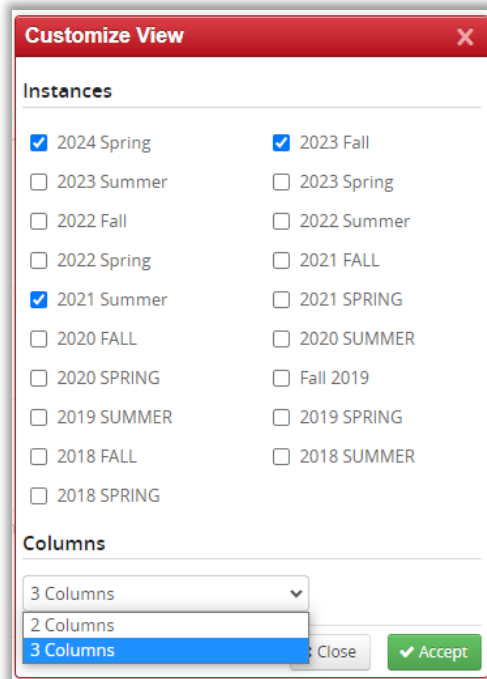

46. The **FRAMER** tool is used to show which courses were offered in previous instances (terms).

To view up to three like-terms together, click **View** from the **Schedule Framer** screen, then select **Customize**:

From the **Customize View** screen, select two or three instances (terms) to compare:

If you select three instances, you must also change the "Columns" option to "**3 Columns**".

Click **Accept**.

The **Schedule Framer** screen will be refreshed to include your selections. For example:

	2022 Spring (H)	2023 Spring	2024 Spring
ACC 1150 Fundamentals of Bus Math	1 F (0)		1 F (100)
ACC 1750 Applied Accounting			
ACC 2010 Financial Accounting	10 LS (0) 1 F (0) 4 W (64)	2 W (0)	
ACC 2020 Managerial Accounting	ACC 2020 – Managerial Accountng 2 F (0) 10 LS (0) 4 W (98)	1 F (35) 1 W (45)	1 F (0) 1 W (45)

Each column will include information about the course listed to the left.

To change the detail displayed, click the **View** button again and select an option:

- "**Summary view**" includes the number of sections offered with the schedule type code and the max enrollment (see screenshot above).
- "**Standard view**" includes the CRN, Instructor and UVID.
- "**Detail view**" includes cross-list information and meeting patterns.

47. The **Export** tool allows you to download instance (term) data in two formats:
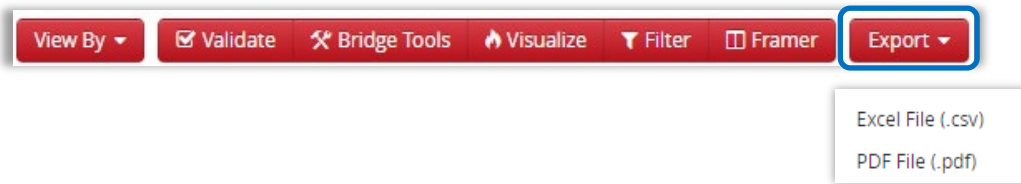
If you select Excel, you can customize the report to your needs. For example:
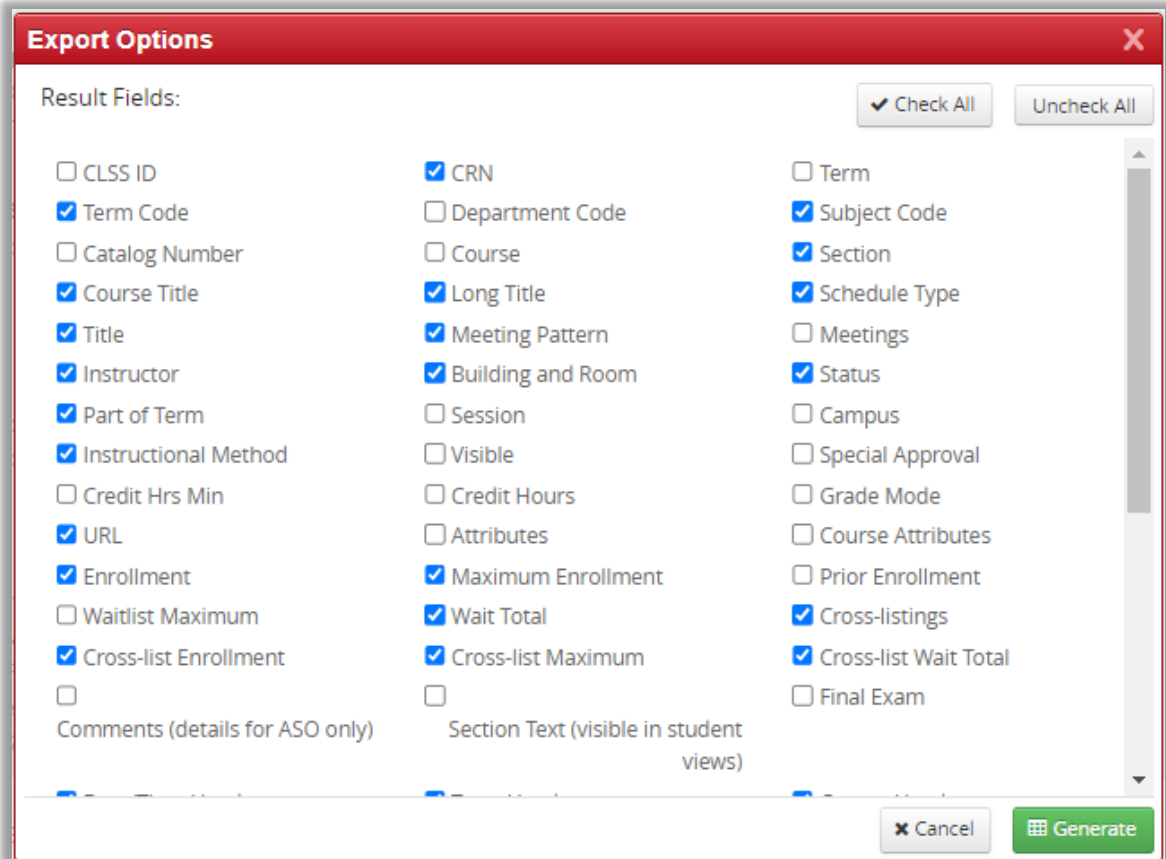
> ❓ **Did You Know...?**
>
> If you uncheck the "Date/Time Header", "Term Header", and "Course Header" choices from the list, your Excel report will be easier to sort and filter.

Common Error Messages

❖ **Section has features that cannot be edited in CLSS.**

> ❶ This section has features that cannot be edited in CLSS. Changes to this section will need to be made directly in your institution's student information system.

This error may appear if one or more of the following scenarios exists:

- Section is part of a "Live Interactive" cross-listed group.
- Information in Banner does not match the information in CLSS (did not sync).
- Part of term dates (start/end) do not match the meeting line dates.
- Cross-listed sections where the required Building/Room "override" code does not exist on both/all sections in Banner.
- The meeting line "Session Indicator" code does not match the Instructor "Session Indicator" code in Banner (both should be "01").

> ❶ This section has features that cannot be edited in CLSS. Changes to this section will need to be made directly in your institution's student information system.
> 005 (2 BIOL 1010-151 (12329) controls the primary scheduling configuration for this cross-listed section

This error indicates changes need to be made from the cross-list controlling (aka parent) section. If the controlling section is locked, the section(s) must be edited directly in Banner.

Email the Academic Scheduling Office for assistance.

❖ **Section is in workflow.**

> **Edit Section – BIOL 494R-001: Student Seminar WE (CRN: 12393; CLSS ID: 610)** ➕ ❓ ✕
> This Section and/or Linked/Cross-Listed Sections are now in Workflow. Changes are Not Allowed at this Time.

This message indicates additional changes can only be made by the <u>original</u> requester until the section is out of workflow (processed by ASO or rolled back for corrections).
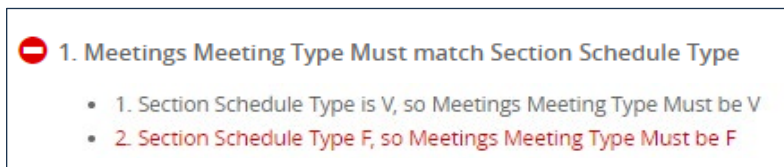

❖ **Invalid meeting pattern.**
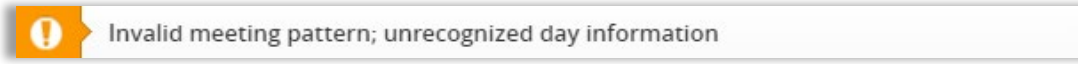
This message indicates an error was made on the Scheduling "snapper" screen. Verify the meeting day entered in the Patterns "User Defined" field is correct (e.g., use "R" rather than "TH" to indicate <u>Thursday</u>).
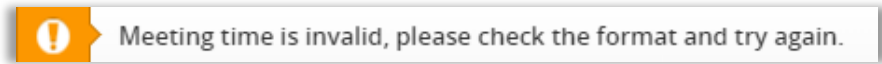
This message also indicates an error was made on the Scheduling "snapper" screen. Verify the meeting time entered in the Patterns "User Defined" field is correct.
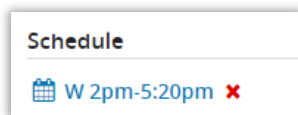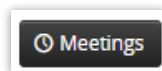

❖ **Invalid meeting pattern.**

This error appears when the **Schedule Type** code was changed at the section header level and <u>not</u> at the meeting line level. To correct this error:

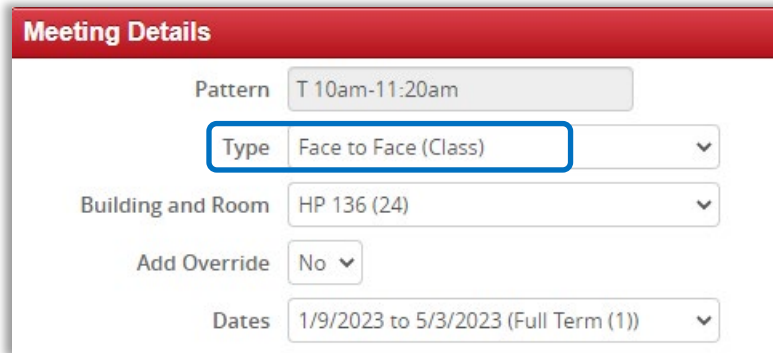o Click the blue meeting pattern displayed under "**Schedule**".

o From the Schedule "snapper" screen, click the black **Meetings** tab in the bottom left corner.

o Click the pencil icon on the "**Using Session Dates**" row.

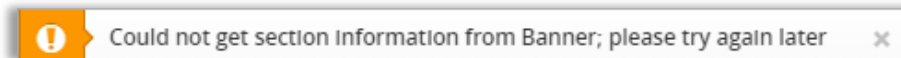o   The "Meeting Details" window will be visible.

The "**Type**" field must <u>match</u> the Schedule Type code selected on the header page.

❖ **SIS connection.**

This message indicates the connection from the SIS (Banner) to CourseLeaf is down. Email the <u>Academic Scheduling Office</u> for assistance.