

## **Operational Support and Guidance**

# **Class Scheduling for Campus Solutions Managed Timetabling**

Scheduling Individual Classes and Making Changes

**Student System Office**

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[http://www.campus.manchester.ac.uk/planningsupportoffice/SSO/ops\\_support/guidance/index.html](http://www.campus.manchester.ac.uk/planningsupportoffice/SSO/ops_support/guidance/index.html)

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## Introduction

This guide is for those users who maintain a full schedule of classes in Campus Solutions (lectures, tutorials, seminars including meeting pattern information etc.), which is then integrated with Syllabus+ to create associated 'Activities'<sup>1</sup>, including the relevant student enrolments.

It will outline how to schedule and configure classes; how to make changes to those classes and how, in turn, those changes affect Syllabus+. Where relevant, there will be guidance on business processes that will be carried out in both Campus Solutions and Syllabus+.

For guidance on Course Catalog Maintenance and other CS processes relating to Class Scheduling (e.g. changing credit / titles / grading basis, enrollment control, adjusting class associations etc.) please see the IT Service Training Guide: 'Course Catalogue & Class Creation and Scheduling' available on StaffNet via <http://www.staffnet.manchester.ac.uk/employment/training/it-systems/>

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<sup>1</sup> S+ 'Activities' will ONLY be created for those classes in CS which have 'Meeting Patterns' defined with BOTH times AND dates/days specified (e.g. 10:00 – 11:00am, Wednesday, 15/09/2014 – 05/06/2015); also see Appendix A for reference

## **Class Scheduling – Campus Solutions Managed**

In this guide it will be described not just how to schedule classes in general, but also how to maintain Class Scheduling data; and how to make changes in Campus Solutions so that integration with Syllabus+ will work correctly.

When discussing changes to classes to facilitate particular integration with Syllabus+, it is important to note that there are two aspects to consider:

- Guidance for where amendments are to be made prior to the beginning of teaching (see page 15) –

**NOTE: this is not exclusive to the beginning of the Academic Year – it is specific to the session in which the class is to be delivered (e.g. once teaching is underway at the beginning of the Academic Year (late September), you can still use this process for Semester 2 delivered classes).**

- Guidance for where amendments are to be made once teaching is underway (see page 19).

## Scheduling a Primary Class

You will firstly need to create and save your primary/graded component class (normally the lecture). Where necessary, you will go on to create associated classes/components (e.g. tutorials, seminars, workshops etc.) once you have saved this first class.

Guidance on Course Catalog configuration (on which class scheduling is dependent) can be found in the IT Service Training Guide: 'Course Catalogue & Class Creation and Scheduling' available on StaffNet via <http://www.staffnet.manchester.ac.uk/employment/training/it-systems/>

### Navigate To: Curriculum Management > Schedule of Classes > Schedule New Course

1. Enter an **Academic Institution** of 'UMANC', along with your chosen **Term** (Academic Year) for which the Course exists. Enter the **Course ID** and click on the **Search** button. If you didn't make a note of the Course ID Number then you can search for your course by entering the **Subject Area** and **Catalog Nbr**.

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

Find an Existing Value

**Search Criteria**

Academic Institution: =    
Term: =    
Subject Area: =    
Catalog Nbr: begins with    
Academic Career: =    
Campus: begins with    
Description: begins with    
Course ID: begins with    
Course Offering Nbr: =    
☐ Case Sensitive

2. You will be taken to the **Basic Data** tab of the Class Scheduling component.

**Basic Data** Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook GL Interface

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

**Class Sections** Find | View All First 1 of 1 Last

\*Session:   Class Nbr: 0    
\*Class Section:  \*Start/End Date:     
\*Component: LEC  Lecture Event ID:   
\*Class Type: Enrollment   
\*Associated Class:   [Associated Class Attributes](#)  
\*Campus: MAIN  Main   
\*Location: MAIN  Main ☒ Schedule Print  
Course Administrator:   ☐ Student Specific Permissions  
\*Academic Organization: 3041  School of Social Sciences  
Academic Group: 3041  School of Social Sciences ☐ Dynamic Date Calc Required  
\*Holiday Schedule:   ☐ Generate Class Mtg Attendance  
\*Instruction Mode: FF  Face to Face ☐ Sync Attendance with Class Mtg  
Primary Instr Section:  ☐ GL Interface Required

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

- You will first need to look up and select the **Session** that you wish to schedule your **primary component/class** for. Click on the look-up button against the Session field and select your chosen value. Once you have selected a session, the **Start/End Dates** for that session will default in.

Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year

\*Class Section:

Class Nbr: 0

\*Start/End Date: 15/09/2014 05/06/2015

- You will next need to enter a **Class Section**. There is no set format to how you should name this, however it is recommended that you choose something simple and meaningful, such as 'LEC1'; 'LEC2', 'TUT1', 'LAB1', etc. In the example below, as this particular component is a Lecture, we have given it a Class Section of 'LEC1'.

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook GL Interface

Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year

\*Class Section: LEC1

\*Component: LEC Lecture

\*Class Type: Enrollment

\*Associated Class: 1

\*Campus: MAIN Main

\*Location: MAIN Main

Course Administrator:

\*Academic Organization: 3041 School of Social Sciences

Class Nbr: 0

\*Start/End Date: 15/09/2014 05/06/2015

Event ID:

Associated Class Attributes

Add Fee

☒ Schedule Print

☐ Student Specific Permissions

**NOTE:** There are some further features of Class Scheduling included in the IT Services Training Guide: 'Course Catalogue & Class Creation and Scheduling' available on StaffNet via <http://www.staffnet.manchester.ac.uk/employment/training/it-systems/>

- You are currently defining the **primary component/class** for your course. At **Component**, select the component type (as has already been defined in Course Catalog) for this class – in this, and most cases, selecting '**Lecture**'; ensuring that **Class Type** is set to '**Enrollment**'.

Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year

\*Class Section: LEC1

\*Component: LEC Lecture

\*Class Type: Enrollment

\*Associated Class: 1

\*Campus: MAIN Main

\*Location: MAIN Main

Class Nbr: 0

\*Start/End Date: 15/09/2014

Event ID:

Associated Class Attributes

Ac

6. Now click on the next tab along – **Meetings**.

7. Next, enter the **Start** and **End** times of the class and specify the day of the week that the class is due to run using the **weekday selection boxes**.

- NOTE:** You do not enter the Facility ID – this will be attributed in the meeting pattern's corresponding instance in the Syllabus+ Activity (refer to Appendices A & C)

Before adding any further meeting patterns, you will need to add Instructor information...

8. You **MUST** complete the **Instructor** section with details of the class instructor/lecturer, and any other relevant members of staff associated with the class. To do this, enter a staff ID (or click on the look-up button to search for and select the appropriate staff member) against the **ID** field.

- NOTE:** You will notice that the Instructor information is linked to each individual Meeting Pattern, so if more than one Meeting Pattern has been specified for a Component then you will need to also re-enter the Instructor information for each Meeting Pattern, as appropriate.

9. The **Instructor Role** should be set to the appropriate role (the default is primary instructor) – especially if the class is one that is being created in **Blackboard** and the staff member will require access to this. This information will then feed through to Blackboard, **creating the necessary access rights for the required staff member**.

- NOTE:** A list of Instructor Roles and their uses can be found in Appendix B

10. You can specify multiple staff members by clicking on the **plus sign** to insert a new row.



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### Class Scheduling for Campus Solutions Managed Timetabling



**NOTE:** Only University of Manchester staff who are actually part of the academic teaching for this course unit or a member of Administrative staff should be detailed in the 'Instructors for Meeting Pattern' area. If you do not want a member of staff to show on transcripts or in self-service, please un-tick the **Print** box, as shown below (as it will be selected by default).

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788		Costanza, George	Prim In:	<input checked="" type="checkbox"/>		



**NOTE:** If you cannot locate a particular staff member to add as an Instructor, see Appendix B.

The error message below will be displayed if the system is unable to locate a specific staff member:

Message

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

OK

The **Access** function controls staff access within gradebook, self-service etc. At least one entry here against the Primary Graded Component **MUST** have an access level detailed within this section to ensure that the course units associated assignment, gradebook and self-service (Instructor/Student) areas function correctly. Without this information students will be unable to view grades/assignments within self-service.

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788		Costanza, George	Prim In:	<input checked="" type="checkbox"/>	Approve Grade Post	

11. There are three levels of access. These are:

**Approve:** Instructor can enter grades and approve the grade roster.

**Grade:** Instructor can only enter grades for the class.

**Post:** Instructor can enter grades, approve the roster, and post the grades.



**NOTE:** If your academics are not required to use gradebook within the system, the Programme/Course Administrator **MUST** be listed within the Instructors for Meeting Pattern for the **Primary Graded Component**. With the correct associated role and access set against their profile in this section.

At this point, if you have more than one meeting pattern for the class, you will need to repeat this process again...

Thus, where you have different meeting patterns for one class (e.g. a Lecture is delivered in one room for a month, then a different room for another month and so on; or a lecture is delivered on

two different days, etc.), click the **plus sign** and do as at step 7, but using the Start and End Dates to also denote the different pattern.

For example

The screenshot displays the Syllabus+ interface for creating Meeting Patterns. It shows two separate Meeting Pattern entries, each with its own set of fields and an associated 'Instructors For Meeting Pattern' table.

**Meeting Pattern 1:**

- Facility ID: [Searchable]
- Capacity: [Searchable]
- Pat: [Searchable]
- Mtg Start: 09:00
- Mtg End: 10:00
- M T W T F S S: [Pattern selection]
- \*Start/End Date: 15/09/2014 to 03/10/2014 (highlighted with a red circle)
- Topic ID: [Searchable]
- Free Format: [Text input]
- Topic: [Text input]
- ☐ Print Topic On Transcript
- Contact Hours: [Link]

**Instructors For Meeting Pattern 1:**

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788	[Searchable]	Costanza, George	Prim In: [Dropdown]	<input checked="" type="checkbox"/>	[Dropdown]	[Buttons]

**Meeting Pattern 2:**

- Facility ID: [Searchable]
- Capacity: [Searchable]
- Pat: [Searchable]
- Mtg Start: 11:00
- Mtg End: 12:00
- M T W T F S S: [Pattern selection]
- \*Start/End Date: 05/10/2014 to 31/10/2014 (highlighted with a red circle)
- Topic ID: [Searchable]
- Free Format: [Text input]
- Topic: [Text input]
- ☐ Print Topic On Transcript
- Contact Hours: [Link]

**Instructors For Meeting Pattern 2:**

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788	[Searchable]	Costanza, George	Prim In: [Dropdown]	<input checked="" type="checkbox"/>	[Dropdown]	[Buttons]

**Room Characteristics:**

*Room Characteristic	*Quantity
[Searchable]	1

In this example, two instances will be created in Syllabus+ allowing rooms to be attributed to the two meeting patterns.

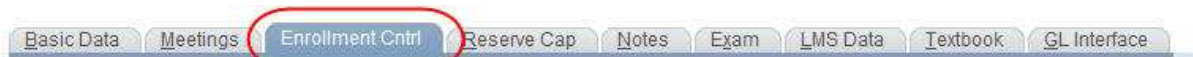


**NOTE:** You will notice that the Instructor information is linked to each individual Meeting Pattern, so if more than one Meeting Pattern has been specified for a Class then you will need to also re-enter the Instructor information for each Meeting Pattern, as appropriate. Therefore, repeat steps 8 – 11.

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12. Now click onto the next tab along – **Enrollment Cntrl.**



13. There is probably very little for you to amend here; however it is worth pointing out some options that you may wish to change from time to time.

- The **Class Status** can be altered if need be, so that it becomes effectively 'closed'. (i.e. **Stop Further Enrolment**). This would then prevent it from being seen and selected for enrollment.



- Enrollment Status** will indicate if the class is available for enrollment (this can become 'closed' either by cancelling the class; or by setting the Class Status to 'Stop Further Enrollment' or 'Tentative Section'; or will become 'closed' when the Enrollment Capacity has been reached).
- The **Enrollment Capacity** will determine the maximum number of vacancies on the given course.
- The **Auto Enroll from Wait List** option can be ticked 'on' (default) or un-ticked, 'off' as required to determine whether or not students on the waiting list for the course will automatically become enrolled, when able.
- The **Resection to Section** field (although left blank below) allows you to tell the system to enroll a student on a different class if the one that they have selected is full. For example; for a mandatory course you may wish to state that if TUT1 is full then automatically enroll the student onto TUT2 by entering 'TUT2' in this field.

Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Enrollment Control Find | View All First 1 of 6 Last

Session: 1YR Full Year Class Nbr: 14822

Class Section: SEM5 Component: Lecture Event ID:

Associated Class: 1 Units: 20.00

\*Class Status: Active Cancel Class

Class Type: Enrollment Enrollment Status: Open

\*Add Consent: No Consent Requested Room Capacity: 30 Total

\*Drop Consent: No Consent Enrollment Capacity: 30


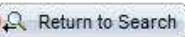

1st Auto Enroll Section: Wait List Capacity: 0

2nd Auto Enroll Section: Minimum Enrollment Nbr: 0

Resection to Section:

☒ Auto Enroll from Wait List ☐ Cancel if Student Enrolled




14. You can now complete your class scheduling for this first class/component by clicking on the **Save** button at the foot of the screen, and a Class Number is created (this number is unique in the scheduled term only).

[Basic Data](#) | [Meetings](#) | [Enrollment Cntrl](#) | [Reserve Cap](#) | [Notes](#) | [Exam](#) | [LMS Data](#) | [Textbook](#) | [GL Interfa](#)

Course ID:	037106	Course Offering Nbr:	1
Academic Institution:	The University of Manchester		
Term:	2014/15 Academic Year	UGRD	<a href="#">Auto Create Compo</a>
Subject Area:	PHIL	Philosophy	
Catalog Nbr:	10777	Defenestration Studies	

**Class Sections** Find | View All | First 1 of 1

*Session:	1YR 	Full Year	<b>Class Nbr:</b>	14817
*Class Section:	LEC1		*Start/End Date:	15/09/2014  05/06/2015 

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### Class Scheduling for Campus Solutions Managed Timetabling

#### Scheduling Associated/Related Class(es)

15. To add in further classes of different component types to schedule (e.g, so you have one Lecture but several different Tutorials/Seminars etc.) then click on the **plus sign** in the top right corner to add in a new row to work with.

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook GL Interface

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections Find View All First 1 of 1 Last

\*Session: 1YR Full Year Class Nbr: 14817  
\*Class Section: LEC1 \*Start/End Date: 15/09/2014 05/06/2015

16. As before with the primary class, enter your **Session** (consistent with the class you have already scheduled) and specify a **Class Section** name (e.g. TUT1, SEM1, WSP1 for Tutorial, Seminar, Workshop respectively etc.). In this example, SEM1 indicates Seminar 1.

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year Class Nbr: 0  
\*Class Section: SEM1 \*Start/End Date: 15/09/2014 05/06/2015

17. You'll note that the **Component** will default to LEC (Lecture) – click the look-up and select the appropriate component.

Look Up Component ? Help

Course ID: 037106  
Course Offering Nbr: 1  
Term: 1141  
Session: Full Year  
Associated Class: 1  
Course Component: =

Look Up Clear Cancel Basic Lookup

Search Results View 100 First 1-2 of 2 Last

Course Component

Lecture  
Seminar

Catalog Nbr: 10777

Class Sections

\*Session: 1YR Full Year  
\*Class Section: SEM1  
\*Component: SEM Seminar

- 18.** As you are scheduling an associated / related class (and not a primary graded class) set the **Class Type** to 'Non-Enroll'.

The screenshot shows a web-based course scheduling interface. At the top, there are tabs: Basic Data, Meetings, Enrollment Cntrl, Reserve Cap, Notes, Exam, LMS Data, Textbook, and GL Interface. The 'Basic Data' tab is active. Below the tabs, course information is displayed: Course ID: 037106, Academic Institution: The University of Manchester, Term: 2014/15 Academic Year, Subject Area: PHIL, Catalog Nbr: 10777, Course Offering Nbr: 1, UGRD, Philosophy, and Defenestration Studies. An 'Auto Create Component' button is visible. Below this is the 'Class Sections' section, which includes a search bar with 'Find | View All' and a pagination indicator 'First 1 of 2 Last'. The 'Class Sections' form contains several fields: '\*Session:' with a dropdown set to '1YR' and a search icon; '\*Class Section:' with a dropdown set to 'SEM1' and a search icon; '\*Component:' with a dropdown set to 'Seminar' and a search icon; '\*Class Type:' with a dropdown set to 'Non-Enroll' and a search icon; '\*Associated Class:' with a dropdown set to '1' and a search icon; and '\*Campus:' with a dropdown set to 'MAIN' and a search icon. To the right of these fields, there are fields for 'Class Nbr:' (0), '\*Start/End Date:' (15/09/2014 to 05/06/2015), and 'Event ID:'. Below these fields are links for 'Associated Class Attributes' and an 'Add Fee' button. The 'Non-Enroll' dropdown in the '\*Class Type:' field is circled in red.

- 19.** Now repeat steps 6 – 15.



# Student System Office – Operational Support & Guidance

## Class Scheduling for Campus Solutions Managed Timetabling

### Changes to Class Schedules and Timetabling (and Integration with Syllabus+)

#### Changes PRIOR TO the beginning of teaching<sup>2</sup>

**NOTE:** Do NOT use this process once teaching has commenced – see page 19 for guidance if this is the case

There may be circumstances where the class schedule in Campus Solutions needs to be amended. The process outlined in this section will ensure that any changes to class schedules within CS do not result in complete activity<sup>3</sup> deletion within S+ (such as a day/time change). Instead, items which are identified to have been changed, will instead be 'flagged for deletion' in S+ and moved to a 'deletion group' (also see Appendix C – excerpt from CTS Syllabus+ Guidance).

**Navigate To:** Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

1. Enter the **Term** – and either **Subject Area** and **Catalog Nbr**; or enter the **Course ID** (this is always located in the top left hand corner of both Course Catalog and Maintain Schedule of Classes)

#### 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

Search Criteria

Academic Institution: = UMANC

Term: = 1141

Subject Area: = PHIL

Catalog Nbr: begins with 10777

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 (Alt+I)

#### 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

Search Criteria

Academic Institution: = UMANC

Term: = 1141

Subject Area: =

Catalog Nbr: begins with

Academic Career: =

Campus: begins with

Description: begins with

Course ID: begins with 037106



Course Offering Nbr: =

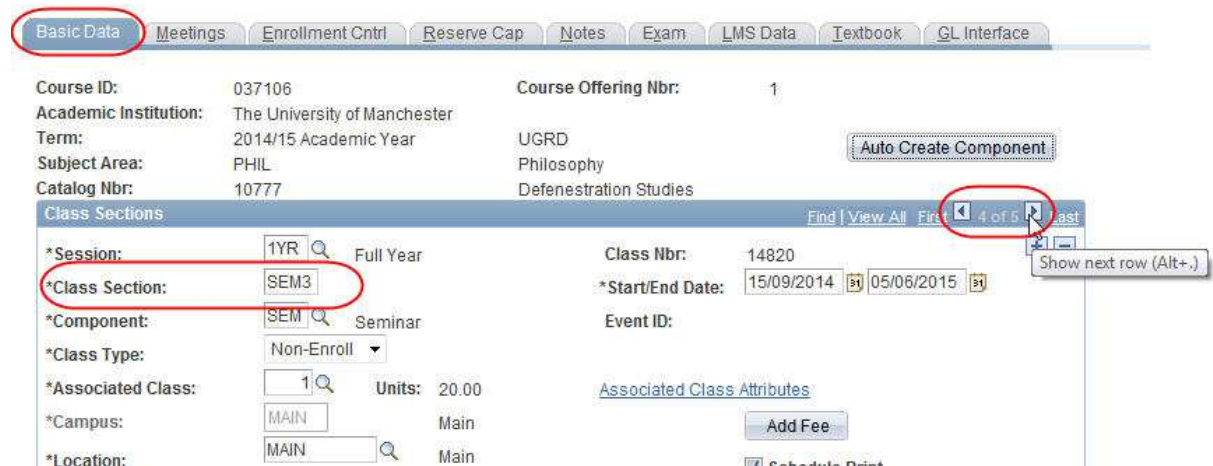
☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

<sup>2</sup> Before the session that the course unit in question is set to begin (i.e. 1<sup>st</sup> Semester, 2<sup>nd</sup> Semester, Full Year)

<sup>3</sup> Please see Appendix A – Campus Solutions / Syllabus+ Integration

- You will be taken to the **Basic Data** tab of the Class Scheduling component. In here, use the  and  buttons to move to the class you wish to make amendments to.



Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook QL Interface

Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections

Find | View All First 4 of 5 Last

\*Session: 1YR Full Year

\*Class Section: SEM3

\*Component: SEM Seminar

\*Class Type: Non-Enroll

\*Associated Class: 1 Units: 20.00

\*Campus: MAIN Main

\*Location: MAIN Main

Class Nbr: 14820

\*Start/End Date: 15/09/2014 05/06/2015

Event ID:

Associated Class Attributes

Add Fee

Schedule Print

- Overwrite the **Class Section** with a new (and unique) name (max. 4 characters) – maintain a consistent naming convention (SEM#, TUT#, WSP#, etc.)



Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data

Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year

\*Class Section:

\*Component: SEM Seminar

\*Class Type: Non-Enroll

\*Associated Class: 1 Units: 20.00

\*Campus: MAIN Main

\*Location: MAIN Main

Class Nbr: 14820

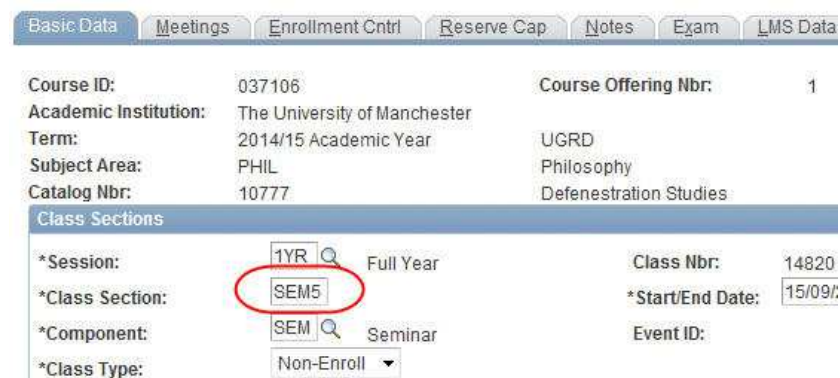
\*Start/End Date: 15/09/2014 05/06/2015

Event ID:

Associated Class Attributes

Add Fee

Schedule Print



Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data

Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Class Sections

\*Session: 1YR Full Year

\*Class Section: SEM5

\*Component: SEM Seminar

\*Class Type: Non-Enroll

\*Associated Class: 1 Units: 20.00

\*Campus: MAIN Main

\*Location: MAIN Main

Class Nbr: 14820

\*Start/End Date: 15/09/2014 05/06/2015

Event ID:

Associated Class Attributes

Add Fee

Schedule Print



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### Class Scheduling for Campus Solutions Managed Timetabling

4. Now move to the **Meetings** tab.

Basic Data **Meetings** Enrollment Cntrl Reserve Cap Notes Ex

Course ID: 037106 Course Offering Nb

Academic Institution: The University of Manchester

5. Amend the Meeting Patterns where necessary (refer to steps 7 and 11 on pages 8 and 9 respectively). You DO NOT need to delete and redo meeting patterns – you can just amend times, days, dates etc. that are already there. Naturally, if you need to delete or add any meeting patterns, use the and buttons accordingly.



**NOTE:** If you are adding any new meeting patterns, remember to add Instructor information for each one (see steps 8-11 on pages 8 & 9)

Class Sections

Session: 1YR Full Year Class Nbr: 14817  
Class Section: LEC1 Component: Lecture Event ID:  
Associated Class: 1 Units: 20,00

Meeting Pattern

Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S \*Start/End Date

09:00 10:00 15/09/2014 03/10/2014

Topic ID: Free Format Topic:

☐ Print Topic On Transcript [Contact Hours](#)

Instructors For Meeting Pattern

Assignment Workload

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788		Costanza, George	Prim In:	<input checked="" type="checkbox"/>		

Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S \*Start/End Date

11:00 12:00 05/10/2014 31/10/2014

Topic ID: Free Format Topic:

☐ Print Topic On Transcript [Contact Hours](#)

Instructors For Meeting Pattern

Assignment Workload

ID	ID	Name	*Instructor Role	Print	Access	Contact
9983788		Costanza, George	Prim In:	<input checked="" type="checkbox"/>		

Room Characteristics

\*Room Characteristic \*Quantity

1

6. You can now click **Save**.

## What happens next with Syllabus+?

Please also refer to APPENDIX C (excerpt from CTS S+ Guidance)

- Through the overnight integration, by overwriting the Class Section name, this will highlight in Syllabus+ the original activity (based on its prior Class Section name, and the meeting pattern information therein) to be marked for deletion (but it will not be deleted immediately, ensuring prior room allocations are not lost)
- Additionally overnight, a wholly new activity (i.e. based on the new Class Section name and any meeting pattern amendments) will then be created in S+ to include any associated student enrolments, without any additional administrator input
- You should then tag the *new* activity in S+ and provide an explanation of the change via Remedy by emailing [ctschanges@manchester.ac.uk](mailto:ctschanges@manchester.ac.uk) (see sections 7.2.2. – 7.2.4. of Appendix C)
- CTS will then need to reassign any room allocation in S+, from the deleted activity, to the newly created activity, and then delete the original activity (note that it will not always be possible to assign the same room to the new activity).



*If an any error was made in updating the schedule of classes within CS (at any point), this process additionally means that any incorrect deletions from S+ via integration, can be reinstated, rather than data lost.*

## What are the implications of making these amendments?

- Students and Staff will NOT see the change to the timetable until CTS have allocated space to the new activity.
- As integration from CS to S+ is a nightly process, changes to the timetable initiated from CS cannot be actioned until the next business day at the earliest.
- To reiterate, this facility is only intended to be utilised for changes to the timetable **prior to actual teaching having begun**. It must NOT be used after teaching activity has already taken place for the given course unit.

# Student System Office – Operational Support & Guidance

## Class Scheduling for Campus Solutions Managed Timetabling

### Changes AFTER the beginning of teaching

There may be instances where changes are necessary mid-teaching. The following process will ensure that historical data is maintained within both CS and S+. Where changes to the timetabling are to occur AFTER teaching has already begun on a given unit, it will likely be necessary to retain the record of prior activity (for example, if attendance rosters have been generated).

Examples of the changes which should be managed in the following way:

- Changes mid-year
- Merging of teaching groups
- Ad hoc class changes – e.g. singular changes to a teaching room/schedule

This process will involve amending end dates of a class (not just a meeting pattern) and transferring any enrolled students to the new class (using a swap process – see section 'Swapping Enrolments from Old to New Class', page 24)



**IMPORTANT NOTE:** where you are making changes to Primary/Graded Classes it is extremely important that you exercise caution – as such things as Gradebook and Grade Rosters will be connected to these types of classes. Please see the section on page 41, and contact the SSO Operational Support Team on x65444 for advice.

### Navigate To: Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

1. Enter the **Term** – and either **Subject Area** and **Catalog Nbr**; or enter the **Course ID** (this is always located in the top left hand corner of both Course Catalog and Maintain Schedule of Classes)

#### 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

Search Criteria

Academic Institution: = UMANC

Term: = 1141

Subject Area: = PHIL

Catalog Nbr: begins with 10777

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 (Alt+1)

#### 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

Search Criteria

Academic Institution: = UMANC

Term: = 1141

Subject Area: = PHIL

Catalog Nbr: begins with

Academic Career: =

Campus: begins with



Description: begins with

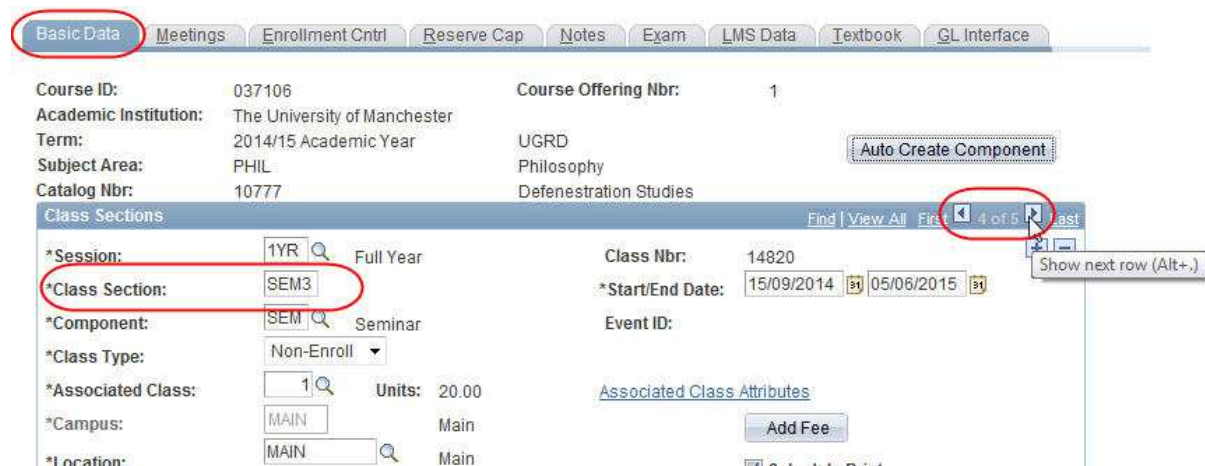
Course ID: begins with 037106

Course Offering Nbr: =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

- You will be taken to the **Basic Data** tab of the Class Scheduling component. In here, use the  and  buttons to move to the class you wish to make amendments to.



Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections: Find | View All First 4 of 5 Last

\*Session: 1YR Full Year

\*Class Section: SEM3

\*Component: SEM Seminar

\*Class Type: Non-Enroll

\*Associated Class: 1 Units: 20.00

\*Campus: MAIN Main

\*Location: MAIN Main

Class Nbr: 14820

\*Start/End Date: 15/09/2014 05/06/2015


Event ID:

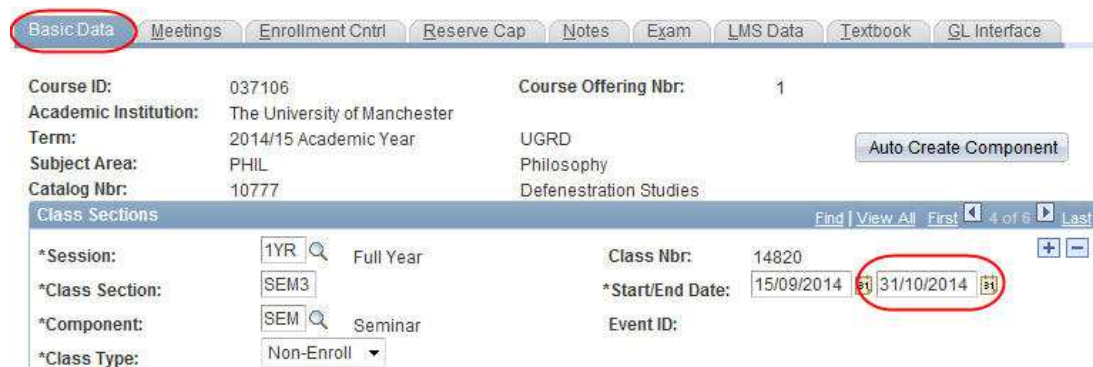
Associated Class Attributes

Add Fee

Schedule Print

- Remaining in the **Basic Data** tab, change the **End Date** to the effective date of the change. Click **Save**.

 **IMPORTANT NOTE:** before you click Save, ensure that any meeting patterns (in the Meetings tab) do not have end dates AFTER the date you are entering here – if so, you will need to amend those dates to correspond with the end date here in the Basic Data tab.



Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections: Find | View All First 4 of 6 Last

\*Session: 1YR Full Year

\*Class Section: SEM3

\*Component: SEM Seminar

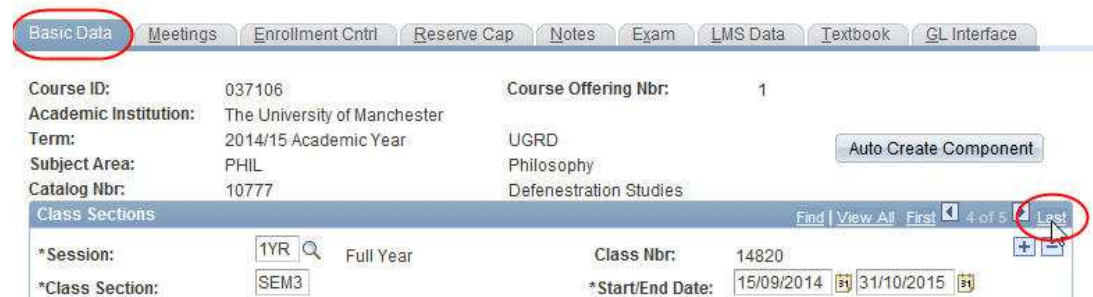
\*Class Type: Non-Enroll

Class Nbr: 14820

\*Start/End Date: 15/09/2014 31/10/2014

Event ID:

- Again, in the **Basic Data** tab, click **Last** in the top right-hand corner of the Class Sections area.



Course ID: 037106 Course Offering Nbr: 1

Academic Institution: The University of Manchester

Term: 2014/15 Academic Year UGRD

Subject Area: PHIL Philosophy

Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections: Find | View All First 4 of 5 Last

\*Session: 1YR Full Year


\*Class Section: SEM3

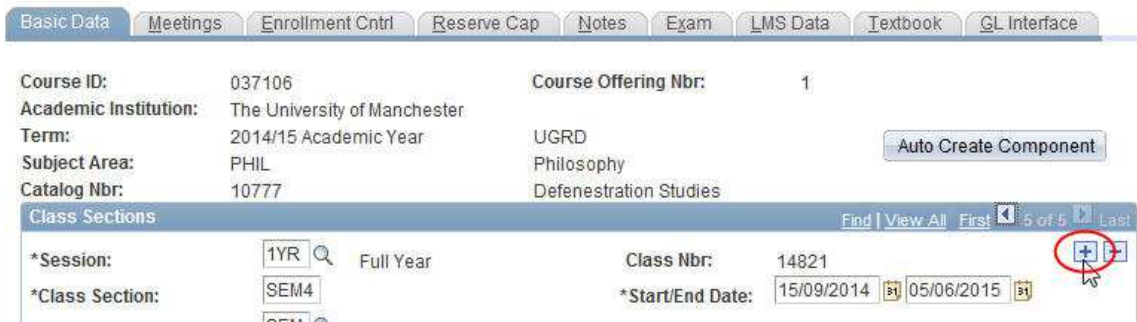
Class Nbr: 14820

\*Start/End Date: 15/09/2014 31/10/2015

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

5. Click the  button to add a new row in Class Sections.



Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | Exam | LMS Data | Textbook | GL Interface

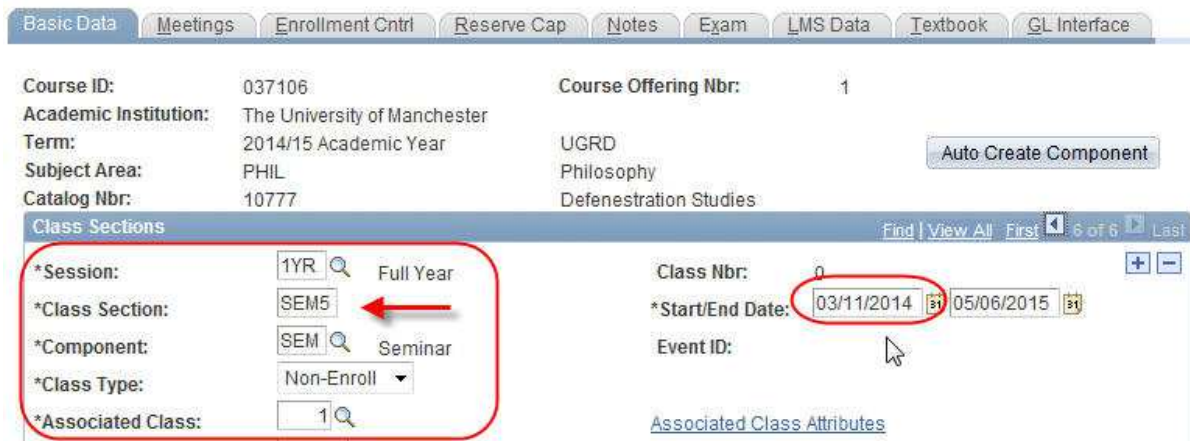
Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections Find | View All First 5 of 5 Last

\*Session: 1YR Full Year Class Nbr: 14821  
\*Class Section: SEM4 \*Start/End Date: 15/09/2014 05/06/2015

6. Create your new class using a new **Class Section** name (follow the process as in either the 'Scheduling a Primary Class' (page 6) or 'Scheduling Associated/Related Class(es)' (page 13) sections of this guide). **IMPORTANT:** However, you MUST change the **Start Date** of this new class to follow on from the end date of the Class you are changing (as described in steps 2-3, page 20).



Basic Data | Meetings | Enrollment Cntrl | Reserve Cap | Notes | Exam | LMS Data | Textbook | GL Interface

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

Auto Create Component

Class Sections Find | View All First 6 of 6 Last

\*Session: 1YR Full Year Class Nbr: 0  
\*Class Section: SEM5 \*Start/End Date: 03/11/2014 05/06/2015  
\*Component: SEM Seminar  
\*Class Type: Non-Enroll  
\*Associated Class: 1

Associated Class Attributes

7. Now move to the **Meetings** tab.



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

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester



8. Always bear in mind your Start Date of this new class as defined in the **Basic Data** tab when defining the Start Date of any of your Meeting Patterns. (Refer to steps 6 – 11, pages 8 – 10 for full guidance).

Basic Data **Meetings** Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook GL Interface

Course ID: 037106 Course Offering Nbr: 1  
 Academic Institution: The University of Manchester  
 Term: 2014/15 Academic Year UGRD  
 Subject Area: PHIL Philosophy  
 Catalog Nbr: 10777 Defenestration Studies

**Class Sections** Find | View All First 1 of 6 Last

Session: 1YR Full Year Class Nbr: 0  
 Class Section: SEM5 Component: Lecture Event ID:  
 Associated Class: 1

**Meeting Pattern** Find | View 1 First 1 of 1 Last

Facility ID Capacity Pat Mtg Start Mtg End M T W T F S S \*Start/End Date  
 09:00 10:00 03/11/2014 05/06/2015  
 Topic ID: Free Format Topic:  
☐ Print Topic On Transcript [Contact Hours](#)

9. Having completed your meeting patterns, and added instructors for EACH unique meeting pattern, move to the **Enrollment Cntrl** tab and configure this (follow the guidance at steps 13 & 14, pages 11 & 12).

Basic Data Meetings **Enrollment Cntrl** Reserve Cap Notes Exam LMS Data Textbook GL Interface

Course ID: 037106 Course Offering Nbr: 1  
 Academic Institution: The University of Manchester  
 Term: 2014/15 Academic Year UGRD  
 Subject Area: PHIL Philosophy  
 Catalog Nbr: 10777 Defenestration Studies

**Enrollment Control** Find | View All First 1 of 6 Last

Session: 1YR Full Year Class Nbr: 0  
 Class Section: SEM5 Component: Lecture Event ID:  
 Associated Class: 1 Units: 20.00

\*Class Status: Active

Class Type: Enrollment Enrollment Status: Open  
 \*Add Consent: No Consent Requested Room Capacity: 30 Total  
 \*Drop Consent: No Consent Enrollment Capacity: 30  
 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

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

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- 10.** Once you click **Save**, your new class number will be generated. Make a note of this number, as you will need this for when you swap students from the old class – see section 'Swapping Enrolments from Old to New Class', page 24

Basic Data Meetings Enrollment Cntrl Reserve Cap Notes Exam LMS Data Textbook GL Interf

Course ID: 037106 Course Offering Nbr: 1  
Academic Institution: The University of Manchester  
Term: 2014/15 Academic Year UGRD  
Subject Area: PHIL Philosophy  
Catalog Nbr: 10777 Defenestration Studies

Auto Create Comp

Class Sections Find View All First 6 of 6

\*Session: 1YR Full Year Class Nbr: 14822  
\*Class Section: SEM5 \*Start/End Date: 03/11/2014 05/06/2015  
\*Component: LEC Lecture Event ID:  
\*Class Type: Enrollment

- 11.** Once you have made your changes, they will become visible in Syllabus+ the **next day**. DO NOT forget to tag them in Syllabus+ if they need a room allocating, and to notify CTS in the usual way via Remedy by emailing [ctschanges@manchester.ac.uk](mailto:ctschanges@manchester.ac.uk) (see sections 7.2.2. – 7.2.4. of Appendix C). Please also refer to APPENDIX C (excerpt from CTS S+ Guidance).

## Swapping Enrollments from Old to New Class

To do this you will be using the Block Enroll Merge functionality of Campus Solutions. The process will be slightly different depending on whether the class you have amended is a Primary/Graded Class (normally the LEC) or an Associated/Related Class (e.g. SEM, TUT, WSP etc.).



*Primary/Graded Components will have things such as Gradebook and Grade Rosters attached to them. It is important that you exercise caution when making amendments to such classes – please see the section on page 41, and contact the SSO Operational Support Team on x65444 for advice.*

## Swapping Enrollments for Primary/Graded Classes (e.g. Lecture – LEC)

In this case we will be swapping students between two primary/graded components (i.e. with a **Class Type** of 'Enrollment')...

...from the class that is no longer running (i.e. the one you have amended to show an end date in **Basic Data**):

...to the newly created class where the Activity has changed:



## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

**Navigate To:** [Records and Enrollment](#) > [Enroll Students](#) > [Block Enrollment](#) > [Block Enroll Merge](#)

1. Click **Add a New Value**.



Block Enroll Merge

Enter any information you have and click Search. Leave

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

Search Criteria

2. In the **Block Enroll Merge** screen/tab. Firstly, click the **Detail / Create** hyperlink directly underneath the blank **Student Block** field.



Block Enroll Merge

Block Enroll Detail

Block Enroll Detail1

Block Enroll Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: Detail / Create

Class Block: Detail / Create

3. You will be taken to the **Create Custom Student Block** screen – click the **Get Class List** button.



Block Enroll Merge

### Create Custom Student Block

Academic Institution: UMANC The University of Manchester

Get Class List

Find View All First 1 of 1

\*ID \*Academic Career Academic Program

4. You will be taken to the **Student Class List** screen. Complete ALL fields with appropriate criteria, using the *original* Class Nbr that you are swapping students *from*.



Student Class List

\*Academic Institution: UMANC Get Students

\*Academic Career: UGRD Select All

\*Term: 1141 Create Student Block

\*Class Nbr: 14817

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1						

- You now need to click the 3 buttons to the left, in order. Therefore, firstly, click the **Get Students** button.

#### Student Class List

\*Academic Institution: UMANC 🔍

\*Academic Career: UGRD ▼

\*Term: 1141 🔍

\*Class Nbr: 14817 🔍

Get Students 1

Select All

Create Student Block

- The students currently enrolled on the class will appear below (you'll note in the **Select** column, *without* any of the boxes selected). Therefore, you now need to click the **Select All** button.

#### Student Class List

\*Academic Institution: UMANC 🔍

\*Academic Career: UGRD ▼

\*Term: 1141 🔍

\*Class Nbr: 14817 🔍

Get Students

Select All 2

Create Student Block

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1 10349859	Jerry Seinfeld	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
2 10349860	Cosmo Kramer	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
3 10349861	Elaine Benes	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
4 9983788	George Costanza	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>

- Ensuring that ALL the select boxes are now checked, click the **Create Student Block** button.

#### Student Class List

\*Academic Institution: UMANC 🔍

\*Academic Career: UGRD ▼

\*Term: 1141 🔍

\*Class Nbr: 14817 🔍

Get Students

Select All

Create Student Block 3

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1 10349859	Jerry Seinfeld	UGRD	00479	Enrolled	12/09/2014	<input checked="" type="checkbox"/>
2 10349860	Cosmo Kramer	UGRD	00479	Enrolled	12/09/2014	<input checked="" type="checkbox"/>
3 10349861	Elaine Benes	UGRD	00479	Enrolled	12/09/2014	<input checked="" type="checkbox"/>
4 9983788	George Costanza	UGRD	00479	Enrolled	12/09/2014	<input checked="" type="checkbox"/>

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

8. It will appear that nothing has happened. However, the block has been created and you can now click **OK**.

#### Student Class List

\*Academic Institution: UMANC

\*Academic Career: UGRD

\*Term: 1141

\*Class Nbr: 14817

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1 10349859	Jerry Seinfeld	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
2 10349860	Cosmo Kramer	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
3 10349861	Elaine Benes	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>
4 9983788	George Costanza	UGRD	00479	Enrolled	12/09/2014	<input type="checkbox"/>

9. You will be returned to the **Create Custom Student Block** screen (as seen at step 3, page 25) – your student block should now be here. Click **OK** on this screen.

#### Block Enroll Merge

##### Create Custom Student Block

Academic Institution: UMANC The University of Manchester

*ID	*Academic Career	Academic Program
10349859 Seinfeld, Jerry	UGRD UGRD	00479 BA(Hons)
10349860 Kramer, Cosmo	UGRD UGRD	00479 Philosophy BA(Hons)
10349861 Benes, Elaine	UGRD UGRD	00479 Philosophy BA(Hons)
9983788 Costanza, George	UGRD UGRD	00479 Philosophy BA(Hons)

10. You will be now returned to the original **Block Enrol Merge** screen/tab (as seen at step 2, page 25). Do not be alarmed that the **Student Block** field is blank! The block has been created.

Block Enroll Merge

Enrollment Request ID: 0000000000 Request Status: Pending

**Merge Blocks**

Academic Institution: UMANC  The University of Manchester

Student Block:   *do not be concerned that this is blank*

Class Block:

**Filtering Criteria**

11. Staying in this screen/tab, now click the **Detail / Create** hyperlink directly underneath the blank **Class Block** field.

Block Enroll Merge

Block Enroll Detail Block Enrl Detail1 Block Enrl Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: Detail / Create

Class Block: Detail / Create

Filtering Criteria

12. You will be taken to the **Create Customized Class Block**. Firstly enter your **Term**.

Block Enroll Merge

Create Customized Class Block

Academic Institution: UMANC The University of Manchester

\*Term: 1141 Action Class Nbr Grading Basis Units

Action Dt Reason Enroll Grade In

Overrides

13. Now change the **Action** to '**Swap Courses**' (when you do so, you will notice that the screen changes slightly, and an extra blank field appears).

Block Enroll Merge

Create Customized Class Block

Academic Institution: UMANC The University of Manchester Find

\*Term: Action Class Nbr Grading Basis Units Crse Count Re

Action Dt Reason Change To Grade In

Swap Courses field appears

Overrides

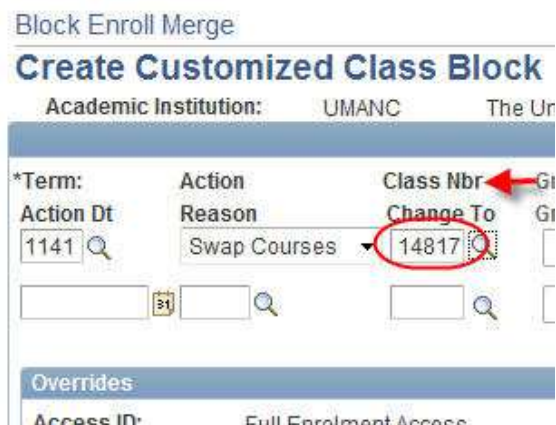
Access ID: Full Enrolment Access Se

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

You will now need to enter the class numbers of the classes you are swapping *from* and *to*. However, to do this, **you must follow these instructions** closely.

**14.** Enter your *original* **Class Nbr** in the top field (corresponding to the field name).



Block Enroll Merge

### Create Customized Class Block

Academic Institution: UMANC The Uni

*Term:	Action	Class Nbr	Gr
Action Dt	Reason	Change To	Gr
1141	Swap Courses	14817	

Overrides

Access ID: Full Enrollment Access

**15.** Now move to the field immediately below the field in the previous step (this is the **Change To** field) and enter the NEW Class Nbr you are moving your students to.



Block Enroll Merge

### Create Customized Class Block

Academic Institution: UMANC The Uni

*Term:	Action	Class Nbr	Gr
Action Dt	Reason	Change To	Gr
1141	Swap Courses	14817	
		14823	

Overrides

Access ID: Full Enrollment Access

**16. IMPORTANT:** Ensure you are **still in the field** where you have entered the last class number - you must now hit **[ENTER]** on your keyboard... You will be taken back to **Block Enroll Merge** screen/tab. DO NOT be alarmed – your work is not lost!



Block Enroll Merge Block Enroll Detail Block Enroll Detail1 Block Enroll Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

### Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: Detail / Create

Class Block: Detail / Create

Filtering Criteria



17. Click back on the **Detail / Create** hyperlink directly underneath the **Class Block** field.

Block Enroll Merge

Enrollment Request ID: 0000000000 Request St

**Merge Blocks**

Academic Institution: UMANC The University of Manc

Student Block: [Detail / Create](#)

Class Block: [Detail / Create](#)

Filtering Criteria

18. Your class details will now be validated. You now need to *at least* check the **Service Indicator** override (for advice on other overrides, for all circumstances, please contact the SSO Operational Support Team on x65444).

Block Enroll Merge

**Create Customized Class Block**

Academic Institution: UMANC The University of Manchester

Find | View All First 1 of 1 Last

*Term:	Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
1141	Swap Courses	14817	UMK	20.00	1.00		
		14823					

Philosophy 10777 LEC2  
Defenestration Studies  
14/15 Year Full Year UGRD

**Overrides**

Access ID: Full Enrolment Access

<input checked="" type="checkbox"/> Action Date	<input checked="" type="checkbox"/> Closed Class	<input type="checkbox"/> Grading Basis	<input checked="" type="checkbox"/> Service Indicator
<input type="checkbox"/> Appointment	<input type="checkbox"/> Class Links	<input checked="" type="checkbox"/> Class Permission	<input checked="" type="checkbox"/> Time Conflict
<input type="checkbox"/> Career	<input type="checkbox"/> Class Units	<input checked="" type="checkbox"/> Requisites	<input checked="" type="checkbox"/> Unit Load
<input type="checkbox"/> Dynamic Dates			<input checked="" type="checkbox"/> Wait List Okay

19. Now click **OK**.

Block Enroll Merge

**Create Customized Class Block**

Academic Institution: UMANC The University of Manchester

Find | View All First 1 of 1 Last

*Term:	Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
1141	Swap Courses	14817	UMK	20.00	1.00		
		14823					

Philosophy 10777 LEC2  
Defenestration Studies  
14/15 Year Full Year UGRD

**Overrides**

Access ID: Full Enrolment Access

<input checked="" type="checkbox"/> Action Date	<input checked="" type="checkbox"/> Closed Class	<input type="checkbox"/> Grading Basis	<input checked="" type="checkbox"/> Service Indicator
<input type="checkbox"/> Appointment	<input type="checkbox"/> Class Links	<input checked="" type="checkbox"/> Class Permission	<input checked="" type="checkbox"/> Time Conflict
<input type="checkbox"/> Career	<input type="checkbox"/> Class Units	<input checked="" type="checkbox"/> Requisites	<input checked="" type="checkbox"/> Unit Load
<input type="checkbox"/> Dynamic Dates			<input checked="" type="checkbox"/> Wait List Okay

**Requirement Designation**

☐ Ovrd RD Designation:  Note ID:

RD Option:  RD Grade:  Repeat:

**Independent Studies**

Instructor ID:

**OK** Cancel Refresh

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

20. You will be taken back to the **Block Enroll Merge** screen/tab. Click the **Merge** button.

Block Enroll Merge | Block Enroll Detail | Block Enroll Detail1 | Block Enroll Detail2

Enrollment Request ID: 0000000000 | Request Status: Pending | Submit

**Merge Blocks**

Academic Institution: UMANC | The University of Manchester | Merge

Student Block: | Detail / Create

Class Block: | Detail / Create

**Filtering Criteria**

Academic Career: |

21. You will now see that the **Submit** button has become available – click this now.

Block Enroll Merge | Block Enroll Detail | Block Enroll Detail1 | Block Enroll Detail2

Enrollment Request ID: 0003246123 | Request Status: Pending | Submit

**Merge Blocks**

Academic Institution: UMANC | The University of Manchester | Merge

Student Block: |

22. After some processing time, your **Request Status** should change to 'Success', indicating that your students have been transferred across to the new primary/graded class (e.g. Lecture).

Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Block Enroll Merge

Block Enroll Merge | Block Enroll Detail | Block Enroll Detail1 | Block Enroll Detail2

Enrollment Request ID: 0003246123 | Request Status: Success | Submit

**Merge Blocks**

Academic Institution: UMANC | The University of Manchester |



*If the **Request Status** returns 'Errors' then please contact the SSO Operational Support Team at [cs.records@manchester.ac.uk](mailto:cs.records@manchester.ac.uk) / x65444 for advice.*

### Checking that Students have been transferred correctly

There are a couple of ways you can check this:

- Against the class directly: Navigate to Curriculum Management > Class Roster > Class Roster
- Against individual students: Navigate to Records and Enrollment > Enrollment Summaries > Enrollment Summary

## Swapping Enrollments for Related/Associated Classes (e.g. Seminars, Tutorials etc.)

This process is very similar to that outlined on pages 25-31. However, there are variants to this.

In this case we will be swapping students between two related/associated classes (i.e. with a **Class Type** of 'Non-Enroll')...

...from the class that is no longer running (i.e. the one you have amended to show an end date in **Basic Data**):

The screenshot shows the 'Basic Data' tab for a class. The course ID is 037106, the academic institution is The University of Manchester, the term is 2014/15 Academic Year, the subject area is PHIL, and the catalog number is 10777. The course offering number is 1. The class number is 14820, and the start/end date is 15/09/2014 to 31/10/2014. The class type is 'Non-Enroll'. A red arrow points to the end date with the text 'end date you have amended'.

...to the newly created class where the Activity has changed:

The screenshot shows the 'Basic Data' tab for a newly created class. The course ID is 037106, the academic institution is The University of Manchester, the term is 2014/15 Academic Year, the subject area is PHIL, and the catalog number is 10777. The course offering number is 1. The class number is 14822, and the start/end date is 03/11/2014 to 05/06/2015. The class type is 'Non-Enroll'.



## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

Navigate To: **Records and Enrollment > Enroll Students > Block Enrollment > Block Enroll Merge**

1. Click **Add a New Value**.



Block Enroll Merge

Enter any information you have and click Search. Leave

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

Search Criteria

2. In the **Block Enroll Merge** screen/tab. Firstly, click the **Detail / Create** hyperlink directly underneath the blank **Student Block** field.



Block Enroll Merge Block Enroll Detail Block Enroll Detail1 Block Enroll Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: **Detail / Create**

Class Block: Detail / Create

3. You will be taken to the **Create Custom Student Block** screen – click the **Get Class List** button.



Block Enroll Merge

### Create Custom Student Block

Academic Institution: UMANC The University of Manchester **Get Class List**

Find | View All First 1 of 1

*ID	*Academic Career	Academic Program
-----	------------------	------------------



*When swapping related/associated classes using the Block Enroll Merge process, you CANNOT just return a class list for that original class (e.g. SEM3, TUT4 etc.) – you have to get the class list for the primary component (normally the Lecture), and then select the students accordingly*

- You will be taken to the **Student Class List** screen. Complete ALL fields with appropriate criteria, using the **Primary Enrollment Class Nbr** (normally the lecture) – you can select the students you need later, and specify the related class they are being transferred to.

#### Student Class List

\*Academic Institution: UMANC

\*Academic Career: UGRD

\*Term: 1141

\*Class Nbr: 14817

Get Students

Select All

Create Student Block

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1						

- You now need to follow the process in order. Therefore, firstly, click the **Get Students** button.

#### Student Class List

\*Academic Institution: UMANC

\*Academic Career: UGRD

\*Term: 1141

\*Class Nbr: 14817

Get Students <sup>1</sup>

Select All

Create Student Block

- Now, rather than clicking the **Select All** button (as at step 6, page 26), select the students who are on the seminar, tutorial, workshop etc. class you are swapping (you can use Curriculum Management > Class Roster > Class Roster and look up the class number to confirm who these students are).

#### Student Class List

\*Academic Institution: UMANC

\*Academic Career: UGRD

\*Term: 1141

\*Class Nbr: 14817

Get Students

Select All

Create Student Block

Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select
1 10349859	Jerry Seinfeld	UGRD	00479	Enrolled	15/09/2014 15	<input checked="" type="checkbox"/>
2 10349860	Cosmo Kramer	UGRD	00479	Enrolled	15/09/2014 15	<input checked="" type="checkbox"/>
3 10349861	Elaine Benes	UGRD	00479	Enrolled	15/09/2014 15	<input checked="" type="checkbox"/>
4 10349911	Tim Whatley	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
5 10349912	George Steinbrenner	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
6 10349913	David Puddy	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
7 10349914	Jacopo Peterman	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
8 10349915	Jackie Chiles	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
9 10349916	Frank Costanza	UGRD	00479	Enrolled	15/09/2014 15	<input type="checkbox"/>
10 9983788	George Costanza	UGRD	00479	Enrolled	15/09/2014 15	<input checked="" type="checkbox"/>

OK Cancel Refresh

- Now click the **Create Student Block**.

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#### Student Class List

\*Academic Institution:

\*Academic Career:

\*Term:

\*Class Nbr:

Empl ID	Name	Academic Career	Academic
---------	------	-----------------	----------

8. It will appear that nothing has happened. However, the block has been created and you can now click **OK**.

#### Student Class List

\*Academic Institution:

\*Academic Career:

\*Term:

\*Class Nbr:

Personalize   Find   View All   2   First 1-10 of 10 Last							
Empl ID	Name	Academic Career	Academic Program	Student Enrollment Status	Last Update Date Stamp	Select	
1 10349859	Jerry Seinfeld	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 10349860	Cosmo Kramer	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3 10349861	Elaine Benes	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 10349911	Tim Whatley	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
5 10349912	George Steinbrenner	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
6 10349913	David Puddy	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
7 10349914	Jacopo Peterman	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
8 10349915	Jackie Chiles	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
9 10349916	Frank Costanza	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input type="checkbox"/>
10 9983788	George Costanza	UGRD	00479	Enrolled	15/09/2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>

9. You will be returned to the **Create Custom Student Block** screen– your student block should now be here, containing only the students you have selected on the previous screen. Again, click **OK** on this screen.

Block Enroll Merge

### Create Custom Student Block

Academic Institution: UMANC The University of Manchester Get Class List

*ID		*Academic Career		Academic Program	
10349859	Seinfeld, Jerry	UGRD	UGRD	00479	BA(Hons)
10349860	Kramer, Cosmo	UGRD	UGRD	00479	Philosophy
10349861	Benes, Elaine	UGRD	UGRD	00479	BA(Hons)
9983788	Costanza, George	UGRD	UGRD	00479	Philosophy

Find | View All | First | 1-4 of 4 | Last

OK Cancel Refresh

10. You will be now returned to the original **Block Enrol Merge** screen/tab (as seen at step 2, page 25). Do not be alarmed that the **Student Block** field is blank! The block has been created.

Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

#### Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: do not be concerned that this is blank

Class Block:

[Detail / Create](#) [Detail / Create](#)

#### Filtering Criteria

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11. Staying in this screen/tab, now click the **Detail / Create** hyperlink directly underneath the blank **Class Block** field.

Block Enroll Merge

Block Enroll Detail Block Enrl Detail1 Block Enrl Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

Merge Blocks

Academic Institution: UMANC The University of Manchester Merge

Student Block: Detail / Create

Class Block: Detail / Create

Filtering Criteria

12. You will be taken to the **Create Customized Class Block**. Firstly enter your **Term**.

Block Enroll Merge

Create Customized Class Block

Academic Institution: UMANC The University of Manchester

\*Term: Action Class Nbr Grading Basis Unit

Action Dt Reason Grade In

1141 Enroll

Overrides

13. Now change the **Action** to '**Swap Courses**' (when you do so, you will notice that the screen changes slightly, and an extra blank field appears).

Block Enroll Merge

Create Customized Class Block

Academic Institution: UMANC The University of Manchester Find | V

\*Term: Action Class Nbr Grading Basis Units Crse Count Re

Action Dt Reason Change To Grade In

1141 Swap Courses

field appears

Overrides

Access ID: Full Enrolment Access Se



Firstly, you will now need to enter the SAME class number in the **Class Nbr** and **Change To** fields – this is because, the *primary* class will be remaining the same – it is the **Related** class that we are changing (which is done in a further field).

14. Enter your *primary* **Class Nbr** (normally the Lecture) in BOTH the top and bottom field (corresponding, respectively, to the headers **Class Nbr** and **Change To**).

Block Enroll Merge

### Create Customized Class Block

Academic Institution: UMANC The University of Manchester

Find | View All First 1 of 1 Last

*Term:	Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
Action Dt 1141	Reason Swap Courses	Change To 14817	Grade In	0.00			
		14817					

Overrides

Access ID: Full Enrolment Access

☒ Action Date ☒ Closed Class ☐ Grading Basis ☐ Service Indicator

☐ Appointment ☐ Class Links ☒ Class Permission ☒ One Conflict

☒ Unit Load

15. Now enter (or use Look Up to select) the class number of the class you are transferring your students *to* (i.e. the new class you have created in Class Scheduling for the change of Activity) in the **Related 1** field (for any scenario where you need to change two related classes – i.e. also use the Related 2 field – please contact the SSO Operational Support Team on x65444).

Block Enroll Merge

### Create Customized Class Block

Academic Institution: UMANC The University of Manchester

Find | View All First 1 of 1 Last

*Term:	Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
Action Dt 1141	Reason Swap Courses	Change To 14817	Grade In UMK	20.00	1.00	14822	
		14817					

Philosophy 10777 LEC1  
Defenestration Studies  
14/15 Year Full Year UGRD

Overrides

16. You now need to *at least* check the **Service Indicator** override (for advice on other overrides, for all circumstances, please contact the SSO Operational Support Team on x65444).

14/15 Year Full Year UGRD

Overrides

Access ID: Full Enrolment Access

☒ Action Date ☒ Closed Class ☐ Grading Basis ☒ Service Indicator

☐ One Conflict

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17. You can now click **OK**.

Block Enroll Merge

### Create Customized Class Block

Academic Institution: UMANC The University of Manchester

Find | View All First 1 of 1 Last

*Term:	Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
Action Dt: 1141	Reason: Swap Courses	Change To: 14817	Grade In: UMK	20.00	1.00	14822	
		14817		Philosophy 10777		LEC1	
				Defenestration Studies			
				14/15 Year Full Year		UGRD	

**Overrides**

Access ID: Full Enrolment Access

<input checked="" type="checkbox"/> Action Date	<input checked="" type="checkbox"/> Closed Class	<input type="checkbox"/> Grading Basis	<input checked="" type="checkbox"/> Service Indicator
<input type="checkbox"/> Appointment	<input type="checkbox"/> Class Links	<input checked="" type="checkbox"/> Class Permission	<input checked="" type="checkbox"/> Time Conflict
<input type="checkbox"/> Career	<input type="checkbox"/> Class Units	<input checked="" type="checkbox"/> Requisites	<input checked="" type="checkbox"/> Unit Load
<input type="checkbox"/> Dynamic Dates			<input checked="" type="checkbox"/> Wait List Okay

**Requirement Designation**

☐ Ovrd RD Designation:

RD Option:  RD Grade:

Note ID:

Repeat:

**Independent Studies**

Instructor ID:

**Buttons:** OK, Cancel, Refresh, Ok (Enter)

18. You will be taken back to the **Block Enroll Merge** screen/tab. Click the **Merge** button.

Block Enroll Merge | Block Enroll Detail | Block Enroll Detail1 | Block Enroll Detail2

Enrollment Request ID: 0000000000 Request Status: Pending Submit

**Merge Blocks**

Academic Institution: UMANC The University of Manchester

Student Block:  Detail / Create

Class Block:  Detail / Create

**Buttons:** Merge, Merge Blocks

**Filtering Criteria**

Academic Career:

19. You will now see that the **Submit** button has become available – click this now.

The screenshot shows the 'Block Enroll Merge' form. At the top, there are four tabs: 'Block Enroll Merge', 'Block Enroll Detail', 'Block Enroll Detail1', and 'Block Enroll Detail2'. Below the tabs, the 'Enrollment Request ID' is 0003246126 and the 'Request Status' is 'Pending'. A red circle highlights the 'Submit' button. Below this, there is a 'Merge Blocks' section with 'Academic Institution' set to 'UMANC' (The University of Manchester) and 'Student Block' set to an empty field. A 'Merge' button is visible. A 'Post Enrollment' button is also present.

23. After some processing time, your **Request Status** should change to 'Success', indicating that your students have been transferred across to the new related/associated class (e.g. seminar, tutorial, workshop etc.)

The screenshot shows the 'Block Enroll Merge' form with the 'Request Status' changed to 'Success'. The 'Submit' button is still present. The 'Academic Institution' is 'UMANC' (The University of Manchester) and the 'Student Block' is empty. A 'Merge' button is visible.

**i** If the **Request Status** returns 'Errors' then please contact the SSO Operational Support Team at [cs.records@manchester.ac.uk](mailto:cs.records@manchester.ac.uk) / x65444 for advice.

### Checking that Students have been transferred correctly

There are a couple of ways you can check this:

- Against the class directly: Navigate to Curriculum Management > Class Roster > Class Roster
- Against individual students: Navigate to Records and Enrollment > Enrollment Summaries > Enrollment Summary



## **Important Considerations when Creating New Classes**

The following scenarios must be considered when creating new classes *after* teaching on a particular Course Unit has started.

If **any** of these scenarios apply, please contact the SSO Operational Support Team at [cs.records@manchester.ac.uk](mailto:cs.records@manchester.ac.uk) / x65444 for advice.

- If the class is a Primary / Graded Component
  - Where there are any existing **Gradebook** entries (including marks), for the original primary / class.
  - In turn, if **Grade Rosters** have been created (whether they contain marks or not)
- For all types of classes
  - Where **Attendance Rosters** are being used – any already created rosters for the old unit will no longer be of use. New ones will need to be created.
  - Implications for integration of the new class(es) into Blackboard

## **Other Guidance**

For training guidance on other Course Catalog and Class Scheduling related functionality (e.g. amending titles; rolling classes forward to subsequent terms, etc.), please see the IT Service Training Guide: 'Course Catalogue & Class Creation and Scheduling' available on StaffNet via <http://www.staffnet.manchester.ac.uk/employment/training/it-systems/>

## APPENDIX A – Syllabus+ Campus Solutions Integration

*[excerpt from the Integration Services Guide – this is not intended as a 'training guide' but can be used for reference]*

### Activity Object

#### Data included in Activity

Activities from Integration are sourced from Courses and Classes that have had any Class Section scheduled for the relevant Academic Year for Organisations within the Activity integration stream ("Campus Solutions Managers" for timetabling purposes).

Activity Object	
Source System = Campus Solutions	
Data Item	Source/Navigation
Activity Host Key e.g. 004316-1SE-TUT1-1	<b>Composite</b> of Course ID, Course Session, Class Section and first Meeting Number in activity pattern: 1) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Course ID (from Course Catalog) 2) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Session 3) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Class Section 4) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern (number in header bar)
Activity Name e.g. ECON20401/LEC/LEC1/01	<b>Composite</b> of Subject and Catalog Number, Component Code, Class Section and first Meeting Number in activity pattern: 1) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Subject Area (from Course Catalog) 2) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Catalog Nbr (from Course Catalog) 3) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Component 4) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Class Section 5) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern (number in header bar)
Activity Description e.g. Yoghurt Weaving	Curriculum Management > Course Catalog > Course Catalog; Catalog Data, Long Course Title OR Description where Long Course Title is missing. If Title changes are made post-

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	scheduling, consult Course/Class guide re Course Roll
Activity Department e.g. 3088	Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Academic Organization
Activity Type e.g. LEC – Lecture	Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Basic Data, Class Sections, Component
Activity Day Pattern e.g. 1010000 (Monday and Wednesday)	<b>Composite</b> of days checked in Meeting Pattern: Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern, M + T + W + T + F + S + S
Activity Start Time e.g. 10:00:00	Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern, Mtg Start
Activity Duration e.g. 120	Minute value calculated by subtracting Start Time from End Time: 1) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern, Mtg Start 2) Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern, Mtg End
Activity Availability Pattern e.g. SEM1.NOT.W06 (READING WEEK)	See below for how Patterns are identified. Once meeting pattern groups have been identified, the following data items are used: Curriculum Management > Schedule of Classes > Maintain Schedule of Classes; Meetings, Meeting Pattern, Start/End Date
Activity Module Code	See Modules Object

#### Activity Integration Functional Specification

Integration will perform the following actions based on data in Source System(s)

Data Item	Insert	Update	Delete
Activity Host Key	Y	Y	Y
Activity Name	Y	Y	Y
Activity Description	Y	Y	Y
Activity Department	Y	Y	Y
Activity Type	Y	Y	Y
Activity Day Pattern	Y	Y	Y
Activity Start Time	Y	Y	Y
Activity Named Availability	Y	N	Y

When Activities are deleted, SPDA will attempt to delete any associated Enrolments.

#### Activity Creation Criteria

Activity creation criteria is identical to Module criteria, save for specific Organisations within the Activity Integration Stream:

- 3016 Manchester Business School (**Undergraduate Only**)
- 3031 School of Law
- 3034 School of Mathematics
- 3041 School of Social Sciences

- 3088 School of Arts, Languages and Cultures

Modules owned by these organisations with UCOL Subject Codes will be handled in the Activity Template integration stream

Activities must fall within the day and time constraints as defined in the relevant Syllabus Plus image Institutional setup. Activities will **not** be created if the source data breaches the following constraints:

- Start Time is not between 08:00 and 21:00
- End Time is not between 08:00 and 21:00
- Start Time is equal to End Time

### Activity Week Pattern determination

For an Activity within a Module, week pattern determination is based on the following data items having the same **day pattern, start time** and **end time** within the Class Meeting Pattern information (see above for item navigation):

- Term
- Course ID
- Course Session,
- Class Section

The Start and End Dates of the Meeting Pattern are used to determine in which weeks the Activity is taking place. **Meeting Start and End Dates should reflect full weeks, starting on the Monday of the week pattern**, not the actual Activity day. The Day Pattern should be used to record which day(s) the Activity takes place. See the examples below of how Class Meeting data is interpreted in to Syllabus Plus Activities.

### Activity Notes

Activity notes are identical to Module notes, except:

- Where a Class Section is **Cancelled** in Campus Solutions, it will be moved to the Activity Deletion Group in Syllabus Plus
- See note for UCOL subject Modules above

### Activity Week Pattern determination examples

All examples are based on the 2013 Academic Year. For Timetabling purposes, this begins with week zero on the 16th of September. Week numbers given are raw week numbers from this point, not adjusted for vacations as in the timetabling calendar.

For a given set of Class Meetings within the same Term, Course ID, Course Session and Class Section, a pattern group is identified by meetings having the same **day pattern, start time** and **end time**. Once the pattern group has been established, the named Availability calculation compares the start date of each week of the timetabling year with each Meeting Start and End Date within the group. If the week start is between the Meeting start and End Dates, the activity is taking place within that week.

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### Class Scheduling for Campus Solutions Managed Timetabling

#### Example 1 – one weekly activity

The Activity takes place on the same day and at the same time throughout the academic year

Course ID	Session Code	Class Section	Meeting Number	Start Date	End Date	Start Time	End Time	Day Pattern	Primary Meeting Number
001234	1YR	SEM3	1	30/09/2013	27/10/2013	12:00:00	13:00:00	0000100	1
001234	1YR	SEM3	2	04/11/2013	15/12/2013	12:00:00	13:00:00	0000100	1
001234	1YR	SEM3	3	03/02/2014	06/04/2014	12:00:00	13:00:00	0000100	1
001234	1YR	SEM3	4	28/04/2014	04/05/2014	12:00:00	13:00:00	0000100	1

Activity Host Key = 001234-1YR-1

Activity takes place in weeks 02,03,04,05,07,08,09,10,11,12,20,21,22,23,24,25,26,27,28 and 32

Activity Named Availability = SEM1.W02-05&07-12&SEM2.W02-11

#### Example 2 – one activity, not weekly.

The Activity takes place at the same time, for the same duration on the same day. It does not take place every week.

Course ID	Session Code	Class Section	Meeting Number	Start Date	End Date	Start Time	End Time	Day Pattern	Primary Meeting Number
001234	1SE	S08A	1	30/09/2013	04/10/2013	13:00:00	14:00:00	0001000	1
001234	1SE	S08A	2	14/10/2013	18/10/2013	13:00:00	14:00:00	0001000	1
001234	1SE	S08A	3	04/11/2013	08/11/2013	13:00:00	14:00:00	0001000	1
001234	1SE	S08A	4	18/11/2013	22/11/2013	13:00:00	14:00:00	0001000	1
001234	1SE	S08A	5	02/12/2013	06/12/2013	13:00:00	14:00:00	0001000	1

Activity Host Key = 001234-1SE-1

Activity takes place in weeks 02,04,07,09 and 11

Activity Named Availability = SEM1.W02,04,07,09&11

#### Example 3 – change of time in second semester, activity split in to two.

The Activity takes place on the same day of each week, but at the beginning of Semester two changes time slot

Course ID	Session Code	Class Section	Meeting Number	Start Date	End Date	Start Time	End Time	Day Pattern	Primary Meeting Number
001234	1YR	LECT	1	23/09/2013	27/10/2013	12:00:00	14:00:00	1000000	1
001234	1YR	LECT	2	27/01/2014	06/04/2014	13:00:00	15:00:00	1000000	2
001234	1YR	LECT	3	04/11/2013	08/12/2013	12:00:00	14:00:00	1000000	1
001234	1YR	LECT	4	09/12/2013	15/12/2013	12:00:00	14:00:00	1000000	1

**First Activity**, Monday 12:00 – 14:00, Semester 1: Meetings 1, 3 and 4 are grouped

Activity Host Key = 001234-1YR-1

Activity takes place in weeks 01,02,03,04,05,07,08,09,10,11 and 12

Activity Named Availability = SEM1.NOT.W06 (READING WEEK)

**Second Activity**, Monday 13:00 – 15:00, Semester 2:

Activity Host Key = 001234-1YR-2

Activity takes place in weeks 19,20,21,22,23,24,25,26,27 and 28

Activity Named Availability = SEM2.W01-10



## APPENDIX B - What to do if you cannot locate your chosen Instructor

[excerpt from the IT Services Training Guide: 'Course Catalogue & Class Creation and Scheduling' available on StaffNet via <http://www.staffnet.manchester.ac.uk/employment/training/it-systems/>]

The role of 'Instructor' is taken from the ResourceLink HR system. There is an 'Advisor Enabled' tick box which if selected allows the staff member to be attached to courses/classes/students in a supervisory capacity, for specified schools. If you find that the Instructor you are looking for does not appear to be available, it may be necessary to activate this persons 'Instructor Role' for a particular school or faculty.

**Navigate To:** [Curriculum Management](#) > [Instructor/Advisor Information](#) > [Instructor/Advisor Table](#)

1. Enter the **EmplID** of the Instructor (if you do not know the EmplID enter First/Last Name details) and click the **Search** button.

Find an Existing Value

Limit the number of results to (up to 300): 300

ID: begins with

Campus ID: begins with

National ID: begins with

Last Name: begins with maradona

First Name: begins with diego

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Their details are returned. The **Advisor** check box should already be ticked, if not you need to select it.

Instructor Details Find | View All First 1 of 1 Last

\*Effective Date: 27/07/2012 \*Status: Active

\*Instructor Type:

\*Academic Institution: UMANC The University of Manchester

\*Primary Acad Org:

\*Instructor Available: Available Assessment Unit:

☒ Advisor ☐ Supervisor

Instructor/Advisor Role Find | View All First 1 of 1 Last

Advisor Number: 1 Percent of Appointment:

\*Academic Career:

Academic Program:

Academic Plan:

Academic Sub-Plan:

Supervisor Role Find | View All First 1 of 1 Last

Supervisor Number: 1 Percent of Appointment:

\*Academic Career:

Academic Program:

Academic Plan:

3. You will also need to ensure that the **Effective Date** on this record is earlier than the Effective Date on the relevant Course/Class record, to which you are trying to add the Instructor to. This can be amended using the **Correct History** option.
4. Click on the **Approved Courses** tab.



5. Here it is possible to see which **Academic Orgs** (faculties/schools) a staff member is available to act as an instructor/advisor for. Click on the **Include History** button to ensure that you can see all of the Academic Orgs that have ever been attached to this staff member.

 A screenshot of the 'Approved Courses' tab. The 'Instructor Details' section shows: Effective Date: 24/07/2005, Status: Active, Instructor Type: Other Advisor, Academic Institution: UMANC, Primary Acad Org: 3049. The 'Course Description' table has columns: Seq Nbr, Acad Org, Subject Area, Course ID, Offer Nbr, Catalog Nbr, Campus. It shows two rows: 1 with Acad Org 3020 and 2 with Acad Org 3049. The 'Acad Org' column is highlighted with a red rectangle. At the bottom, the 'Include History' button is highlighted with a red rectangle.

**NOTE:** In the rare case that **duplicate rows** of Academic Org data appear – some listed as being 'Inactive', simply delete these 'Inactive' ones from the list ( by using the minus sign to remove them and then clicking on the Save button).

6. To add an Academic Org to the list (so that the person can be assigned as an instructor/advisor within a particular school) it is necessary to add a new row. Click on the **Add a Row** button (plus sign).

 A screenshot of the 'Course Description' table. It shows two rows with Acad Org values 3020 and 3049. The 'Add a Row' button (plus sign) is highlighted with a red rectangle.

7. In the new row, enter the **Academic Org** value that you wish to add, by clicking on the **magnifying glass** to search.

 A screenshot of the 'Course Description' table. It shows three rows. The third row is highlighted in yellow and has a magnifying glass icon in the 'Acad Org' column, which is highlighted with a red rectangle.

## Student System Office – Operational Support & Guidance

### Class Scheduling for Campus Solutions Managed Timetabling

8. Select the **Academic Org** from the results listed (remember you can modify the results by adding criteria or by sorting the columns by clicking on their headers). *Note that the list has been cropped in this screenshot.*

#### Look Up Acad Org

Academic Institution: UMANC

Academic Organization: begins with

Description: begins with

[Basic Lookup](#)

#### Search Results

View 100 First 1-158 of 158 Last

Academic Organization	Description
1000	<a href="#">The University of Manchester</a>
2000	<a href="#">Faculty of Eng &amp; Phys Sci</a>
2001	<a href="#">Faculty of Humanities</a>
2002	<a href="#">Faculty of Life Sciences</a>
2003	<a href="#">Faculty of Med and Hum Sci</a>
2005	<a href="#">University Administration</a>
2006	<a href="#">Other University Activities</a>
2007	<a href="#">Payroll Service Recipients</a>
3000	<a href="#">Centre for Cont Education</a>

9. The new **Academic Org** is now added to the **Approved Courses** list meaning that the staff member is now able to act in an advisory capacity for this particular school.

[Instructor/Advisor Table](#) [Approved Courses](#)

Staff Details: Withheld

Staff Details: Withheld

**Instructor Details** Find | View All First 1 of 2 Last

Effective Date: 24/07/2006 Status: Active

Instructor Type: Other Advisor ☒ Advisor

Academic Institution: UMANC The University of Manchester

Primary Acad Org: 3049 IT Services Division

**Course Description** Customize | Find First 1-3 of 3 Last

Seq	Libr	Acad Org	Subject Area	Course ID	Offer ID	Catalog Libr	Campus
1		3020					
2		3049					
3		3021					

10. Click on the **Save** button.

- 11.** It is now possible to attach this staff member as an Instructor, for the selected school(s). If you continue to have problems, please contact the SSO Operational Support Team

## Instructor Roles

Instructor Role	Blackboard Role / Usage
Prim Instr	<ul style="list-style-type: none"><li>• Academic Staff / Primary Course Unit Leader</li><li>• Grants Academic Instructor access in Campus Solutions</li><li>• Grants Designer and Instructor rights in Blackboard</li><li>• (Build &amp; Teach tabs)</li></ul>
Sec Instr	<ul style="list-style-type: none"><li>• Academic Staff / Secondary Course Unit Leader</li><li>• Grants Academic Instructor access in Campus Solutions</li><li>• Grants Instructor rights in Blackboard</li><li>• (Teach tab)</li></ul>
TA	<ul style="list-style-type: none"><li>• Teaching Assistant</li><li>• Grants Academic Instructor access in Campus Solutions</li><li>• Grants various rights in Blackboard, as designated by the system or faculty administrator and will therefore vary between courses/schools/faculties</li><li>• (Teach tab with any applied restrictions)</li></ul>
Bb Design	<ul style="list-style-type: none"><li>• Blackboard Course Designer</li><li>• Grants Designer rights in Blackboard</li><li>• (Build tab)</li></ul>
Bb PInstr	<ul style="list-style-type: none"><li>• Primary Learning Technologist</li><li>• Grants Designer &amp; Instructor rights in Blackboard</li><li>• (Build &amp; Teach tabs)</li></ul>
Bb SInstr	<ul style="list-style-type: none"><li>• Secondary Learning Technologist</li><li>• Grants Instructor rights in Blackboard</li><li>• (Teach tab)</li></ul>
	<ul style="list-style-type: none"><li>•</li></ul>

## **APPENDIX C – excerpt from CTS Syllabus+ Guidance**

7. Changes required from Yellow Timetable onwards: Making Changes Post CTS room allocation Syllabus+ will be reopened for School PSS Staff use once CTS have dealt with the room requests as presented (after 1st August) and rooms that have been allocated for all Activities can then be viewed. Where changes to room bookings are necessary (e.g. sequential teaching for a member of staff prevents an allocated room from being feasible), it will then be possible to request changes to room bookings from CTS. CTS will collaborate with schools to resolve:

- Class Size Changes
- Tutorial Requests
- Student Options
- Staffing
- Disability
- Course Cancellations

Changes should be made and “tagged” in Syllabus+ (using the tag **\*CTS\_CHANGE\_REQUIRED\***) and a job should also be submitted to CTS, via Remedy, where a reason for the change will need to be stated. Please note that you will not be required to complete the user text field on Syllabus+ as information regarding the change will be in Remedy request.

### **7.1. Applying the *\*CTS\_CHANGE\_REQUIRED\** tag in Syllabus+**

The tag should be applied to any change activity that requires a change made to it. It is most easily applied in Syllabus+ classic, but can also be applied in the ET view, when dealing with jointly taught or variant activities. The following sub sections will describe the types of change requests that can be made.

#### **7.1.1. A new request for CTS room**

1. Create and schedule the activity in the usual manner
2. Tag the activity **\*CTS\_CHANGE\_REQUIRED\***
3. Remember to write-back your changes

#### **7.1.2. Cancelling a booking entirely**

**NOTE: It is imperative that you DO NOT reschedule the activity as your allocated location will be immediately lost and will affect necessary room usage statistics.**

1. If it is a complete deletion of an entire activity/room booking then DO NOT delete the activity from the system. Once again tag the activity **\*CTS\_CHANGE\_REQUIRED\***
2. Press the 'Modify' button and write-back your changes.

#### **7.1.3. Reducing the number of weeks for a room booking**

**NOTE: It is imperative that you DO NOT reschedule the activity as your allocated location will be immediately lost and will affect necessary room usage statistics.**

1. If it is a change to the teaching week-pattern (i.e. removing of weeks) from an activity, then complete the necessary changes to the Activity to take out the unneeded weeks and tag the activity **\*CTS\_CHANGE\_REQUIRED\***.
2. Press the 'Modify' button and write-back your changes.

#### **7.1.4. Increasing/changing the number of weeks for a room booking**

**NOTE: It is imperative that you DO NOT reschedule your activity as your currently allocated location may be immediately lost and do not alter the room allocation on the Resources tab.**

1. Amend the activity to show the revised weeks for teaching and then tag the activity **\*CTS\_CHANGE\_REQUIRED\***.

2. Press the 'Modify' button and write-back your changes.

#### **7.1.5. Changing the time for a room booking**

**NOTE: It is imperative that you DO NOT reschedule the activity as your currently allocated location may be immediately lost and do not alter the room allocation on the resources tab.**

1. Amend the activity to the new time/day and tag the activity '\*CTS\_CHANGE\_REQUIRED\*'.  
2. Press the 'Modify' button and write-back your changes.

#### **7.1.6. A request to change to a different room**

**NOTE: It is imperative that you DO NOT reschedule the activity as your currently allocated location may be immediately lost and do not alter the room allocation on the Resources tab.**

1. Tag the activity with '\*CTS\_CHANGE\_REQUIRED\*'.  
2. Press the 'Modify' button and write-back your changes.

#### **7.1.7. Swapping rooms between activities**

**NOTE: It is imperative that you DO NOT reschedule the activities as your currently allocated location may be immediately lost and do not alter the room allocation on the Resources tab.**

1. Tag both activities with '\*CTS\_CHANGE\_REQUIRED\*'.  
2. In your Remedy request regarding both activities, provide an explanation to CTS to explain that you wish to swap the room allocations between the two activities. (Please specify the other activity name in your Remedy Request.  
3. Press the 'Modify' button and write-back your changes.

#### **7.1.8 Cancelling independent room bookings and requesting a new larger room when creating a joint activity.**

**NOTE: It is imperative that you DO NOT reschedule the activities as your allocated location will be immediately lost and will affect necessary room usage statistics.**

1. For any existing activity/activities which already have rooms booked (to be cancelled), tag the activity '\*CTS\_CHANGE\_REQUIRED\*'.  
2. Create the new jointly taught activity as described in the Syllabus+ Training Manual (Section 11, Page 39), and schedule the activity in the usual manner.  
3. Tag the new activity '\*CTS\_CHANGE\_REQUIRED\*'.  
4. Remember to write-back your changes.

### **7.2. Submitting the job request to CTS.**

All change requests made by schools will now be done so via email (ctschanges@manchester.ac.uk.) and logged in the University's Remedy system. CTS will then process the change request via remedy, making the necessary changes to the activity in Syllabus+. The remedy system will document all communication between CTS and the schools as well as providing a medium for CTS to inform schools that a change request is being worked on or has been successfully dealt with.

**N.B. – One off ad hoc requests will still need to be sent to cts@manchester.ac.uk and any timetabled change requests will need to go via ctschanges@manchester.ac.uk. Requests sent through to the wrong email address will be replied too but not dealt with.**

#### **7.2.1. Schools Tag Activities in S+ and amend where necessary**

Schools will tag any activity in Syllabus+ that requires a change with the tag '\*CTS\_CHANGE\_REQUIRED\*'. They will also amend the activity if necessary (remembering to **NOT** reschedule).

#### **7.2.2. School then submit request via email to Remedy**

Schools then summarise their change requests and submit them via email to ctschanges@manchester.ac.uk which then automatically logs a request in Remedy. Each email **MUST** contain the following information:

- Activity name (multiple activities can go on same request)



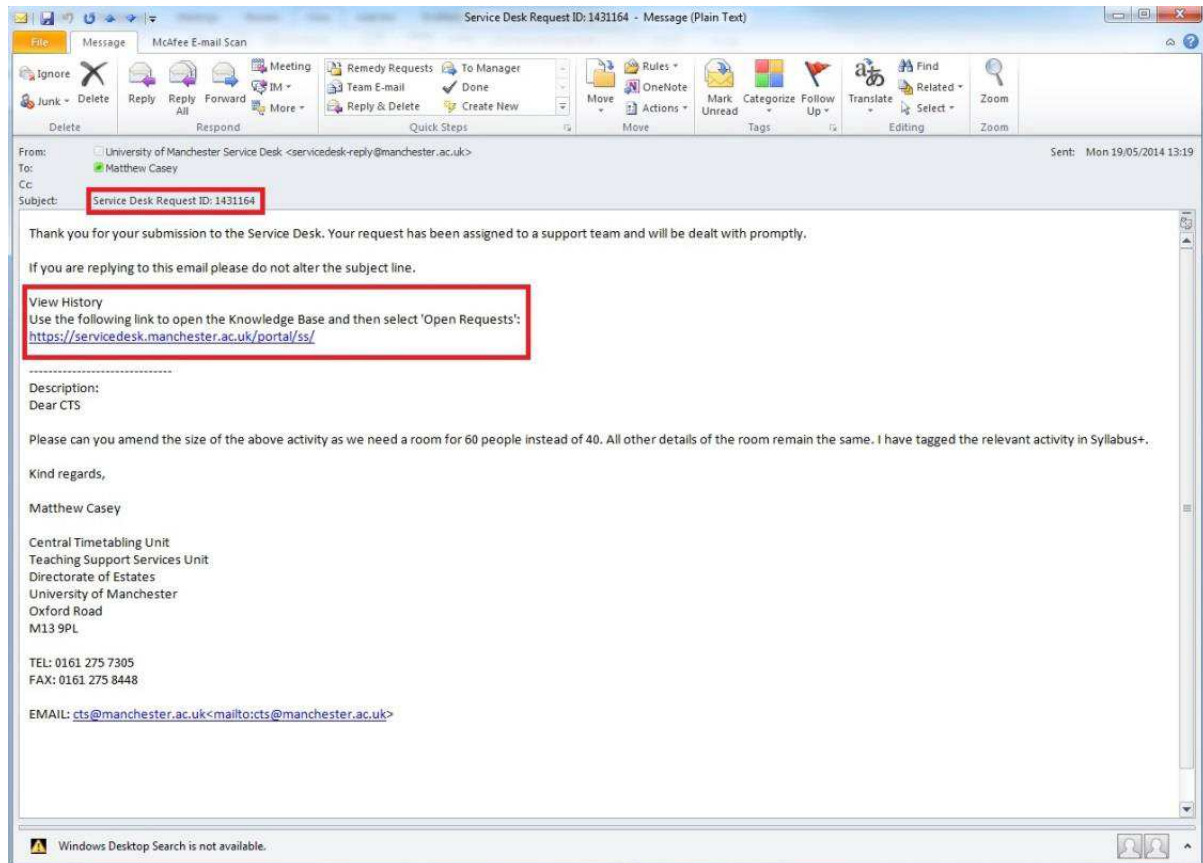
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- Reason for Request
- Action required (i.e. larger room, change in time/day etc.)

#### 7.2.3. Remedy Acknowledgement and request history

As per the screenshot on the next page schools will receive automated confirmation that their request has been received and a member of CTS has been assigned to deal with it as soon as possible. For each request made they will receive a unique reference number that can be quoted when contacting CTS along with a web link that can be clicked on to view the progress/history of the request. Both are highlighted in the following example:

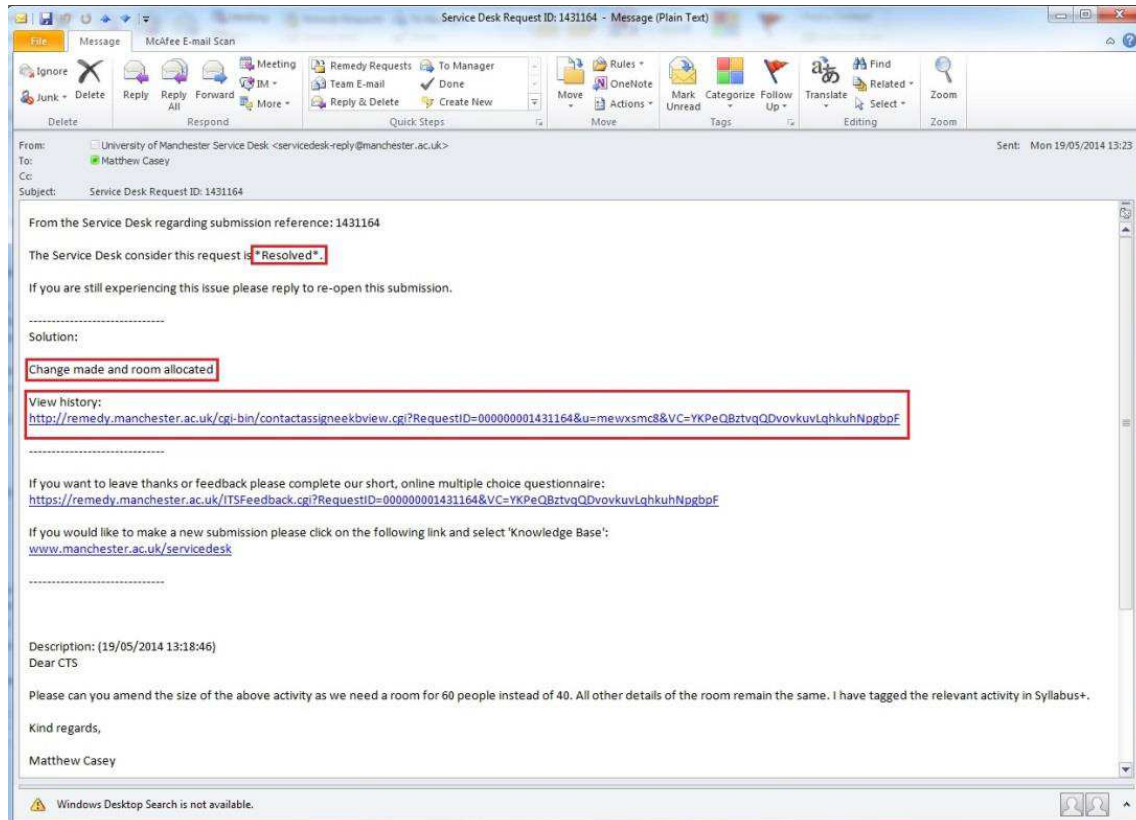


Please note that when clicking on the web link you may be taken to a log-in page where you will need to log-in using your regular University username and password and then you can click on 'Open Requests' on the left hand side of the page. An example of the request history can be seen below:

<div> <div>  <div> <div>Knowledge Base</div> <div>The University of Manchester</div> </div> </div> </div>		
<p><b>NOTE:</b> If you submit a message to a closed call, then the incident will automatically be re-opened.</p> <p>The message text may contain email system characters.</p>		
History For 000000001431164		
Date	Action Taken	Message
Mon May 19 13:18:46 2014	Description	<p>Dear CTS</p> <p>Please can you amend the size of the above activity as we need a room for 60 people instead of 40. All other details of the room remain the same. I have tagged the relevant activity in Syllabus+.</p> <p>Kind regards,</p> <p>Matthew Casey</p> <p>Central Timetabling Unit Teaching Support Services Unit Directorate of Estates University of Manchester Oxford Road M13 9PL</p> <p>TEL: 0161 275 7305 FAX: 0161 275 8448 EMAIL: cts@manchester.ac.uk</p> <p>-----</p> <p>[Max. 4,000 characters shown. This message is displayed as plain text and may have been truncated for the incident history.]</p>
Mon May 19 13:22:32 2014	Email to User	<p>Hi Matt</p> <p>Thanks for your email.</p> <p>The change has now been made, please check syllabus+ for room allocation.</p> <p>Kind regards,</p> <p>Matt</p> <p>Matthew Casey</p> <p>Timetabling Co-ordinator</p>
Mon May 19 13:22:51 2014	Solution	Change made and room allocated

## 7.2.4. Open and Resolved Requests

Once the change request has been looked at by a member of CTS and action has been taken, you will receive an automated update (as per the example below) either letting you know that the change has been successfully made, the request will be marked as 'resolved', or a member of CTS will request further information.



If you would like to re-open a resolved request you can simply reply to the automated email you receive.