Academic Scheduling 101

Process Overview and Timeline
Basics of PeopleSoft Class Scheduling
Academic Schedule Building

Class Build

- The fall and spring schedules are built independently, a year in advance.
- Each new term is created by copying forward the last like term (Fall to Fall, Spring to Spring).
- Both Fall and Spring terms are copied forward in early September.
- The official schedule building memo, with specific scheduling dates and deadlines, is posted in July on the APSS website and is emailed to campus at the beginning of each build term.
- Schedulers can find more details on the timeline and process in Box.
- Chairs can use the prior like term to begin considering their new term schedule build at ANY time.
- Chairs should provide their ASC with a mostly finalized schedule to build, by the time the official memo is received.

Room Placement

- Decentralized-Centralized model for room scheduling.
- Each College is allocated a subset of the 24-49 capacity general use lecture rooms for priority use during schedule build.
  - The College determines which of their departments book classes in each room.
- Schedulers have priority booking in these rooms during the first 8 weeks of each build cycle (Rounds 1-2) (decentralized).
- Schedulers always have exclusive access to book “their” spaces, such as labs.
- Once in Round 3, all lecture rooms revert to APSS for exclusive booking (centralized).
- APSS always schedules the “jumbo”, aka 50+ capacity rooms.
- Schedulers request additional rooms by the end of each Round (1=jumbo, 2=roomless).
- Periodic emails are sent during the process highlighting upcoming due dates, tasks and reminders.
### Schedule Building Timeline for 2022-2023 AY

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fall 2022 Schedule Building</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Round I – 10/4/21 – 11/15/21</td>
<td>Dept. schedules all classes in rooms allocated to college/department</td>
<td>Jumbo room requests are due 11/15/21</td>
</tr>
<tr>
<td>Round II – 11/15/21 – 12/20/21</td>
<td>Colleges finalize schedule, self-audit, and cleanup of schedule</td>
<td>Roomless requests are due 12/20/21</td>
</tr>
<tr>
<td>Round III – 12/20/21 – 4/22/22</td>
<td>Minimal schedule adjustments only</td>
<td>APSS audit and cleanup of schedule</td>
</tr>
<tr>
<td></td>
<td>All lecture rooms scheduled exclusively by APSS</td>
<td>Schedule available in public Class Search on 2/1/22</td>
</tr>
<tr>
<td>4/25/2022</td>
<td>Fall 2022 Registration Begins</td>
<td>All meeting pattern changes must have prior approval from the college dean.</td>
</tr>
</tbody>
</table>

**Spring 2023 Schedule Building**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Round I – 2/7/22 – 3/28/22</td>
<td>Dept. schedules all classes in rooms allocated to college/department</td>
<td>Jumbo room requests are due 3/28/22</td>
</tr>
<tr>
<td>Round II – 3/28/22 – 4/25/22</td>
<td>Colleges finalize schedule, self-audit, and cleanup of schedule</td>
<td>Roomless requests are due 4/25/22</td>
</tr>
<tr>
<td>Round III – 4/25/22 – 10/21/22</td>
<td>Minimal schedule adjustments only</td>
<td>APSS audit and cleanup of schedule</td>
</tr>
<tr>
<td></td>
<td>All lecture rooms scheduled exclusively by APSS</td>
<td>Schedule available in public Class Search on 6/1/22</td>
</tr>
<tr>
<td>10/24/2022</td>
<td>Spring 2023 Registration Begins</td>
<td>All meeting pattern changes must have prior approval from the college dean.</td>
</tr>
</tbody>
</table>

**Schedule Building Timeline Notes**

During **Round I of schedule building**, departments are expected to schedule all of their classes in the rooms allocated to them. This includes **EXCLUSIVE** (lab spaces). Even if a particular room does not meet all of the instructors' preferences it should be scheduled in any room available within the department allocation of rooms. **Having the class in a room will be helpful in arranging a trade later on.** A new room may be requested with the preferences detailed **before** all the “roomless” classes have been placed.

- Jumbo room assignments are made based on expected enrollment, verified by prior like term actual enrollment. A **jumbo room** is a room with capacity of 50 or more. There are 28 jumbo rooms ranging in capacity from 50 to 463 seats. All jumbo rooms are identified ("smart") rooms.

During **Round II of schedule building**, colleges and departments work to correct all scheduling errors, including non-standard times, wrong section numbers, incorrect AM or PM times, and to schedule any remaining roomless classes in any classroom available to the college. **The CRA scheduling building audit jobs are available for colleges and departments to audit and correct for most of the common scheduling errors.**

For the spring schedule build only, the end of **Round II** is set to coincide with the next fall semester's registration. This gives students and their advisors the ability to plan their class schedule for the entire academic year.

- Any “roomless” room requests to APSS should only be made after all department and college allocations (exclusive, and priority allocated general use) rooms have been completely filled.
- Room requests to APSS during “primer time” (9am – 2pm, and particularly 11) have a very low chance of being filled. If you make this type of request you must include a non-primer time alternative day and time.

During **Round III of schedule building**, only very minimal schedule adjustments should be made. Examples of minimal adjustments would be adding a section in response to demand, changing an instructor, deleting a section due to lack of resources, and room changes to accommodate enrollment or instructor needs.

No classes can be placed on the schedule without a room from this point on. Once registration begins for the semester there should be no changing of class days or times. Only under the most critical of circumstances should a day/time change be considered, and then the change must be approved in writing by the college dean.

Classes are **deleted** from the schedule **before** registration begins.

Classes are **cancelled** from the schedule **after** registration begins.
APSS-Shared folder

This is where you’ll find a bunch of helpful guides, checklists, workshops, etc.

CLASS-depts is specific to schedule building.

As a member of “acadunitsupport”, you have access to this set of folders.

This is what it looks like today, via Box Online, sorted alphabetically (this isn’t everything):
Schedule Building Rounds

There are three specific time periods, called “Rounds”, for schedule building:

- **Round I -- Departments schedule classes and then book in exclusive lab spaces and (24-49 cap) priority lecture rooms allocated to the department by their College**
  - Jumbo (50+ cap class) room requests are due to APSS by the end of Round I

- **Round II -- Colleges coordinate the placement of all remaining roomless classes within their priority-allocated rooms**
  - Schedulers works with APSS to clean up all scheduling and class time errors
  - All general use lecture rooms revert to APSS for exclusive booking at the end of Round II
  - Roomless requests are due to APSS by the end of Round II

- **Round III – Final schedule adjustments prior to registration**
  - These should be MINOR changes such as adding a section, changing an instructor or room, deleting sections due to lack of resources
  - No classes are allowed on the schedule at this point without a room
  - No section number changes
  - Term is viewable on the Class Schedule a few months prior to registration

Once registration begins, day/time changes or class cancellations must be approved by the Dean.

- This includes classes without enrollment
Preparing for Round I

- Prior academic year is copied to the new terms ("Term Roll") approximately September 7
  - As soon as the terms are available, APSS will let the department ASCs know

- Between the time the term is available and the official schedule build memo is issued:
  - Run the Cognos “Class Schedule-Build” Report for the prior like term
  - Consult with your Chair
  - Plan for schedule changes – or begin working on them!
  - You’ll also be working on Workload and answering questions about the Final Exam schedule – it’s a busy time!

- By the time Round I officially begins, you should have a clear plan for changes, and be ready to jump in and book as many classes as possible in your priority allocation of lecture rooms, as well as your exclusive lab spaces
Cognos: Class Schedule-Build report
https://www.csuchico.edu/data/
https://bi.csuchico.edu/ibmcognos/bi/
Standard Scheduling Times


- Set of standard days and times to offer classes
- Maximizes room utilization
- Ensures the schedule is made up of interchangeable, non-overlapping parts
- Maximizes students’ ability to schedule classes campus-wide without time conflicts which helps with timely graduation
- Facilitates our ability to trade rooms between classes when necessary

- If there is a compelling need for a non-standard time AND the dean agrees that it overrides the student and campus need for standard time scheduling, it can be used
  - The dean’s approval must be sent to APSS with an explanation of the compelling need, indicating whether the approval is temporary (one semester only) or permanent. There’s a form for that.
  - Approval should be in place BEFORE booking a general use lecture room
Class Time Required

Every class has a Course Classification number (CS)

https://www.csuchico.edu/apss/_assets/documents/c-class-list-and-definitions.pdf

The CS plus the unit value of the class determines:

- the number of hours the class is required to be scheduled per week
  - Or, the number of TBA hours assigned per week*
    - Or a combination thereof
- how much time the student is expected to participate per week
- the amount of WTU (workload) that is generated for the instructor

*If some or all of the required time is not standard face-to-face classroom instruction it is described as “TBA” (To Be Arranged) and the number of TBA hours per week is entered in the system and displayed on the Web for students and advisors. See the TBA guide!
Round I

- Consult the Class Schedule-Build report of existing sections in PeopleSoft (from Cognos)
- Use *Maintain Schedule of Classes* to change / delete existing sections
- Use *Schedule New Course* to add classes that didn’t roll
- After an overnight system refresh, audit class setups to check for errors
  - CRA Schedule Building audit jobs (see the [cheatsheet](#))
- Place as many of your classes as possible in your labs and priority allocation of 24-49 cap rooms
- Let your college know when you’ve maximized your allocation, so you can share lecture rooms with other departments in your college
- Enter Jumbo room requests by the deadline
Jumbo Lecture Rooms

- Capacity of 50 or more
- Exclusively scheduled by APSS

Departments submit their Jumbo Room requests to APSS before the end of Round I: https://emsint.csuchico.edu/APSS/RoomRequest/RoomRequest

Placement of classes in jumbo rooms is done using the following criteria:
- Optimal utilization of room capacity (min. 85% capacity)
- Pedagogic need for the specific room features
- Enrollment history of the class
- Prior use of the room for the same day/time
## Jumbo Lecture Room Details

<table>
<thead>
<tr>
<th>Location</th>
<th>Capacity</th>
<th>Special Limitations</th>
<th>Location</th>
<th>Capacity</th>
<th>Special Limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAC 144</td>
<td>463</td>
<td>8:00am – 12:50pm only</td>
<td>OCNL 254</td>
<td>75</td>
<td>None</td>
</tr>
<tr>
<td>PAC 134</td>
<td>210</td>
<td>MWF 8-8:50am, TR 8-9:15am only</td>
<td>PLMS 201</td>
<td>75</td>
<td>None</td>
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<tr>
<td>AYRS 106</td>
<td>192</td>
<td>None</td>
<td>PLMS 205</td>
<td>75</td>
<td>None</td>
</tr>
<tr>
<td>AYRS 120</td>
<td>166</td>
<td>4:00pm and later</td>
<td>THMA 108</td>
<td>75</td>
<td>None</td>
</tr>
<tr>
<td>HOLT 170</td>
<td>146</td>
<td>None</td>
<td>OCNL124</td>
<td>68</td>
<td>None</td>
</tr>
<tr>
<td>LANG 300</td>
<td>120</td>
<td>None</td>
<td>AYRS 201</td>
<td>65</td>
<td>None</td>
</tr>
<tr>
<td>LANG 302</td>
<td>120</td>
<td>None</td>
<td>HOLT 266</td>
<td>65</td>
<td>None</td>
</tr>
<tr>
<td>THMA 116</td>
<td>120</td>
<td>None</td>
<td>HOLT 268</td>
<td>65</td>
<td>None</td>
</tr>
<tr>
<td>ARTS 111</td>
<td>112</td>
<td>None</td>
<td>HOLT 350</td>
<td>65</td>
<td>None</td>
</tr>
<tr>
<td>ARTS 112</td>
<td>112</td>
<td>None</td>
<td>HOLT 352</td>
<td>65</td>
<td>None</td>
</tr>
<tr>
<td>GLNN 212</td>
<td>99</td>
<td>None</td>
<td>MODC 114</td>
<td>64</td>
<td>None</td>
</tr>
<tr>
<td>PLMS 102</td>
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<td>None</td>
<td>GLNN 112</td>
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<td>None</td>
</tr>
<tr>
<td>THMA 106</td>
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<td>None</td>
<td>PLMS 106</td>
<td>59</td>
<td>None</td>
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<tr>
<td>PAC 206</td>
<td>76</td>
<td>None</td>
<td>GLNN 306</td>
<td>50</td>
<td>None</td>
</tr>
</tbody>
</table>
Room Request Application
https://emsint.csuchico.edu/APSS/RoomRequest/RoomRequest

Check out the APSS website for instructions:
https://www.csuchico.edu/apss/scheduling/schedule-building/room-request.shtml

Term should default to the active Round I/II build term

- Select your Department
- Breathe...it takes 20 seconds to load the list of classes into the browser
- DON'T TOUCH THE EXCEL ICON at this point

- This application is restricted each round to either JUMBO (50+) or ROOMLESS (< 50) sized classes
- Classes with a STANDARD day/time meeting pattern are placed first
- Add Remarks, including:
  - ChicoFlex, if you need it
  - Alternate non-primetime meeting pattern option for classes scheduled during primetime
  - Accessibility accommodations required by instructor
  - Back-to-Back section info (either for instructor OR for students!), subject-number-section
  - Features (required, or preferred), such as chalkboards

- Save; at this point you can click the Excel icon to download a list of your requests for your own records. Do not send to APSS!
Round II

- Review a new Class Schedule-Build report with your Chair
- Use Maintain Schedule of Classes to finalize changes
- After an overnight system refresh, audit class setups to check for errors
  - CRA Schedule Building audit jobs (see the cheatsheet)
- Place as many of your classes as possible in your college’s remaining priority allocation of 24-49 cap general use lecture rooms
  - Colleges should plan to meet as a group and “share” allocations, at least 1 week before the end of Round II
- Enter Roomless class requests by the deadline
- Work with APSS to clean up audit findings that we send to you

- Only MINOR changes are expected after this point
  - MINOR changes include: adding a section, changing an instructor or room, deleting sections due to lack of resources
  - No section number changes unless you let APSS know
Standard Lecture Rooms

- Capacity from 24 to 49
- Not all rooms are ChicoFlex capable

- Each college/dept has a priority allocation of general use lecture rooms to schedule classes in during Rounds I and II of the schedule build
  - Schedulers should aim to return “your” classes to the college pool at the end of Round I, or sooner, for sharing!

- At the end of Round II all general use lecture rooms revert to APSS for exclusive, centralized booking

- Departments submit their Roomless requests to APSS before the end of Round II:
  - https://emsint.csuchico.edu/APSS/RoomRequest/RoomRequest

- Departments are allowed to book their own labs/exclusive spaces at all times, following the campus facilities use policy.
- It is expected that classes will be placed in lab rooms by the end of Round II.
What happens after Round II?

- **Round III** describes the period after roomless requests are submitted, and before registration begins, for a given term.
- Schedule changes should be minimal, and minor, but do not need special permissions.
- New sections or meeting pattern changes, which require a room...
  - **ROOMS MUST BE REQUESTED THROUGH THE ACADEMIC ROOM REQUEST WORKFLOW (ARRW) via Astra**
- Round III technically continues until the semester begins; however, once **registration** has started your Dean will need to approve any further changes!
  - Please consider the impact to the students, of changing a published schedule. You will be asked to justify your changes.
Here’s how the magic happens...

- Use the Class-Checklist
  - It doesn’t have pictures, but does walk you through an explanation of each field in Maintain that you need to pay attention to
- See the next set of slides for specifics on each Tab in Maintain Schedule of Classes
- Audit your setups
- Read the guides: guide name begins with “CLASS-“
- Ask questions!
Maintain Schedule of Classes

- Basic Data tab
- Meetings tab
- Enrollment Cntrl tab
- Notes tab
- Exams tab

And also...
- Schedule New Course
- Schedule Class Meetings
- Update Sections of a Class
Maintain: Basic Data tab

Changes to Existing ("rolled") CLASS section(s)

- Class Schedule-Build Report
- Internal (Dept/College) schedule planner
- Only Delete **before** registration!

Creating a NEW class?

- Course = what’s in the CATALOG
- Class = a section of a course, scheduled for a specific TERM
- Use Schedule New Course, rather than Maintain Schedule of Classes
Basic Data tab

Fields of importance:
- Class Section
- Component
- Class Type
- Associated Class
- Schedule Print
- Instruction Mode
- Class Attributes

Don’t change anything else on this tab
Basic Data tab

- **DO NOT CHANGE THE TERM DATES ON THIS TAB**

- **Class Section** = 2-digits for State Support classes
  - Start with 01; add next available number
  - Special setups start with 50 (U-Courses), 60 (Course Link), or 70 (Distance sections)

- **Component** = lecture/lab classes have more than one

- **Class Type** = only one type can be the Enroll component

- **Associated Class** = same as section number, minus the leading zero
  - Shared across multi-component sections
  - **PeopleSoft will mislead you!**

- **Schedule Print** = hides the class from the Class Schedule AND from searches for open classes

- **Instruction Mode** = required to be correct, and is largely ignored
  - Impacts faculty workload reporting
Instruction Mode

- Increasingly important for Faculty Workload reporting
- Required by the Chancellor for fully online course reporting and availability to CSU-wide students
- Defaults to catalog setting, which is nearly always not the best choice
  - change via request to APSS
- Shows on the Class Schedule

Class Attributes

Do not remove any existing attribute, unless you put it there

- “+” AND ADD A ROW
- Required for degree progress mapping
- Fully online (FONL)
- Blackboard (WBCT)
  - Not needed for combined sections!
- VPN permission
- Distance (CDOE)
Instruction Mode (MOI)

- Class Schedule Glossary is the primary campus source for MOI descriptions: [https://www.csuchico.edu/schedule/glossary.shtml](https://www.csuchico.edu/schedule/glossary.shtml)

- Schedulers can use the CLASS-Notes MOI Examples spreadsheet for more detailed explanation

- Please do not create your own interpretations of the Mode of Instruction

- MOI “F” – may be discontinued
  - But ChicoFlex continues
ChicoFlex
and Instruction Mode (MOI)
and Notes

- CLASS-Notes MOI Examples spreadsheet
- Discussion...
- MOI “F” – discontinued effective Fall 2022
  - Associated Class number still needs to be unique
  - Multi-component courses
  - Collapsing WTU, Blackboard, Cognos:
    - Combined sections
- Spring 2022 (2222) = In Person!
  - But ChicoFlex continues
Maintain: Meetings tab

Fields of importance:

- Meeting Pattern
  - Facility ID
  - Pat
  - Mtg Start/End
  - Start/End Dates
- Meeting APDB Mapping Values

- Instructors
  - ID, Access, Empl Rcd#  
  - Workload tab
- Additional fields of interest in blue…you may not need to do anything with these, but, you might
Meetings tab

- **Variable unit course?**
  - Class APDB Mapping Values link, then Adjust Class Associations

- **Facility**
  - wwwonline = TBA pat, TBA hours
  - Exclusive use spaces (labs)
  - Round I jumbos requested, Round II roomless requested, Round III everything requested!!

- **Meeting Pattern**
  - TBAs: check out the TBA-sections guide in Box
  - Meeting APDB Mapping Values link
    - Space Type is important!
  - Instructors on first mtg pattern only
    - Order entered affects Class Schedule display order

- Start/End dates can be changed on THIS tab
- Delete, then Save; do not overwrite
Instructor Empl Rcd

- Always use the magnifying glass to look up and verify
- PeopleSoft inserts whatever value it feels like
- Important for faculty workload
- Correct, Active record may not be available until contract is keyed by HR

Space Type

Meeting APDB Mapping Values link:

- 1 Lecture for any class meeting in a general use lecture room
- 2 Laboratory for any class meeting in an exclusive space (lab)
- 3 Non-Capacity for any wwwonline class
  - Add TBA hours as necessary
- 3 Non-Capacity for any TBA (no room) class
  - Add TBA hours
Error booking a room?

When you see the error message like the one above:

- Go to the Class Event Table
- Copy the 9-digit number and paste into the Event ID field
- Click Search
- You’ll be given ALL the meetings that conflict, but 99.9% of the time it’s a single class already in that timeslot, causing the conflict!
Maintain: Enrollment Cntrl tab

Fields of importance:

- Class Status
  - Active or Cancelled
  - How to Cancel a class
- Add/Drop Consent
- Enrollment Cap
- Jumbo room requests
- Waitlist Cap
- 1st Auto Enroll Section
Maintain: Notes and Exams tabs

**Notes**: use “-” button to remove notes

- Effective with the new Class Schedule, you can add Note Rows by using the “+” sign
- Please use Notes to articulate MOI plan

**Exams**: View Only

- Use CRA #1405 for a listing by Term
Audit your work

- CRA schedule building jobs – there are a LOT of them
  - DON’T start at the top of the list...you’ll never want to run audits again
- Use the cheatsheet to shorten your list, depending on how much time you have for audits
- Some audits are not intuitive, so APSS will run them for you
  - CRA1498 is a great example of a job you do NOT want to run
  - Ignore the “Jobs we clean up with your input” listed in the top paragraph of the cheatsheet —we’ll let you know if there’s a problem!
- See the workshop on Reporting
Other places you’ll go...

Schedule Class Meetings
- Combined classes
  - Combined Sections Table
    - Cognos Combined Sections to check these!

Adjust Class Associations
- Variable unit courses
- Check your associations (Basic Data tab)
- Check Class Requisites

Update Sections of a Class
- Multi-component classes
Combined Sections

Classes qualify for combination only if they share a ROOM, DAYS, TIMES, and INSTRUCTOR

Guide in progress

Multi-Component Classes

Guide in progress

Variable Unit classes

See CLASS-Variable-Units guide

Very few classes are variable unit; refer to your Course Inventory report
Distance sections

Companion sections for students outside of Chico CDOE, Redding

Guide in progress

Course links & U-courses

Guide in progress

Special Topics (‘98s) classes

https://www.csuchico.edu/curriculum/academic-department-manual/special-topics-courses.shtml
FAQs

How did my class get overenrolled?

- Enrollment Request Search

Why can’t students enroll?

- Requisite troubleshooting: Adjust Class Associations, CRA840
Resources

Jennifer L. Aceves, Academic Scheduling and APDB Specialist

- apss@csuchico.edu
- 898-4688 (but email is best)

Scheduling Specialty Sections workshop builds on this one!

Once the schedule is built, other questions will come up.

- Visit Records and Registration: https://www.csuchico.edu/sro/registration/

http://www.csuchico.edu/apss

Click or hover on the “Academic Scheduling” link on the left navigation bar to find:

- Schedule Building, which has:
  - Policy Resources: Standard Scheduling Conventions, Course Classification (CS) Listing, Instruction Modes
  - Room Information: Jumbo and Lecture room lists, Classroom links, and other schedule build room-related links
  - Guides and Tips

This training revised February 8, 2022