

# ERS SOC WORKSHEET

## HOW TO ACCESS ENTERPRISE REPORTING “SCHEDULE OF CLASSES WORKSHEET” AND INPUT INSTRUCTIONS FOR NEW SCHEDULE BUILD

Office of Registrar – Schedule of Classes

NORTHERN ARIZONA UNIVERSITY

[Registrar.ScheduleofClasses@nau.edu](mailto:Registrar.ScheduleofClasses@nau.edu)

Revised May 6, 2019

## Contents

Navigation and Search Criteria .....	2
Saving a Report to Excel .....	3
“Required Input” Tab .....	4
“Required & Optional Inputs” Tab .....	10
“New Class Template” Tab .....	15
How to Input a Textbox to Provide Clarity .....	16
Examples - How to Input Changes on ERS SoC Worksheets .....	17
Adding Rows to Excel Worksheet .....	18



## Navigation and Search Criteria

Public Folders > LOUIE - Student Reports > Course and Class Information > SoC Worksheet

**Prompts**

Available prompt variants

**Prompts Summary**

- ✓ \* Enter Term: **1201**
- ✓ PICK value(s) for Campus: **Flagstaff Mountain;Online**
- ✓ OR PICK value(s) for Subject: **Accounting**
- ✓ OR PICK value(s) for Class Subject + Nbr:
- ✓ OR PICK value(s) for Class Nbr:
- ✓ OR PICK value(s) for Unit:
- ✓ OR PICK value(s) for Division:

**Enter Term:**

1201

Refresh Values

\*Term Cd

- 1211
- 1207
- 1204
- 1201
- 1198
- 1197
- 1194
- 1191
- 1188
- 1187

February 15, 2019 8:25:34 PM GMT+00:00

\* Required prompts

OK Cancel

**Search by selecting:**

1. Term
2. Campuses
3. Subjects

You may also specify your search by selecting Class Nbr etc.

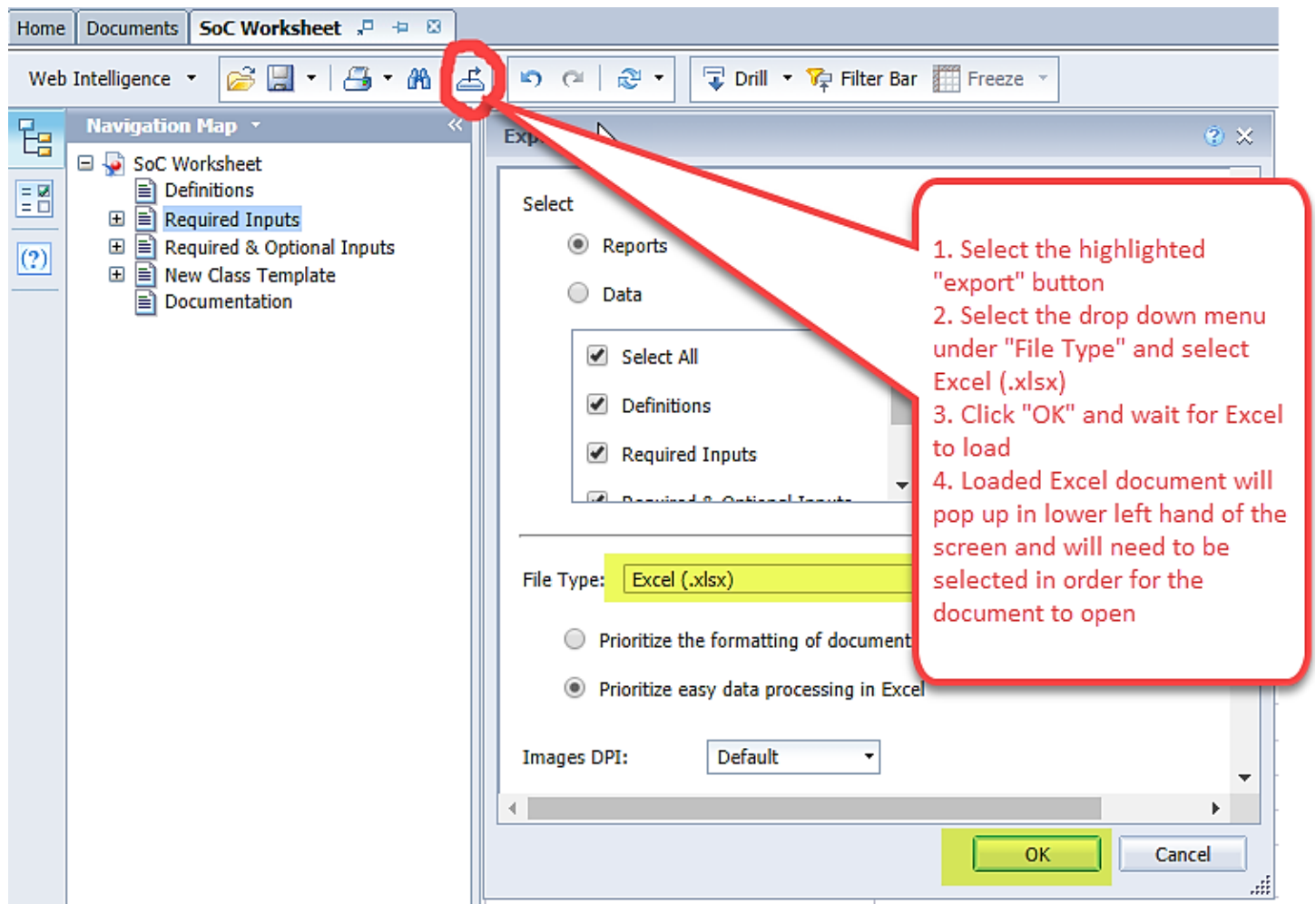
(Note: You may need to refresh values to see selections)

Click "OK"

- Enterprise Reporting “Schedule of Classes” worksheets are now referred to as “ERS SoC Worksheets.”
- Run reports for the term that applies, e.g., AY 20/21 worksheets should be run for 1207 (Fall 2020) and 1211 (Spring 2021).
- Select the campus that applies, e.g., FLGMT. Flagstaff Mountain campus schedulers will only select Flagstaff Mountain or Online for campus, unless your unit also schedules Statewide classes.
- Classes with multiple meeting patterns will populate with additional columns to the right – one for each additional meeting pattern.

## Saving a Report to Excel

Once the report is saved to your computer as an Excel document, you can input changes to classes that will be offered.



## “Required Input” Tab

Definitions	<b>Required Inputs</b>	Required & Optional Inputs	New Class Template
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**Please carefully read the instructions.** Enter any data field changes below on the “Enter changes HERE” (shaded) column of the ERS SoC Worksheet.

- Do not remove any class details that populated on the second column of the worksheet.

Each academic unit will be responsible for understanding how and why changes need to be input in the ERS SoC Worksheets.

**Class: FOR 213 Class Nbr: 1517 Section: 001**

Course Title: Ecology & Mgt Of Forests Soils Topic Title: None

			Enter changes HERE:
Class Attribute:		Class Attribute: (Informational only)	
Class Value:		Class Value: (Informational only)	
Section:	001	Section:	
Session:	M16	Session:	
Start Date:	01/13/2020	Start Date: (Only Required for DD sessions)	
End Date:	05/08/2020	End Date: (Only Required for DD sessions)	
Component:	LEC	Component: (LEC/Zero Unit Lab only)	
Class Type:	Enrollment Section	Class Type: (LEC/Zero Unit Lab only)	
Grading Basis:	LTR	Grading Basis: (BTH/BIP only)	P/F
Min/Max Units:	3/3	Min/Max Units: (Variable Unit only)	
Campus:	FLGMT	Campus:	DISUN
Instruction Mode:	P	Instruction Mode:	O
Topic Title & Topic ID:	0	Topic Title & Topic ID:	
Facility ID:	082-136	Facility ID: (Approved Pre-Assignment only)	
Meeting Pattern Start Date:	1/13/2020	Meeting Pattern Start Date: (If differs from session)	
Meeting Pattern End Date:	5/8/2020	Meeting Pattern End Date: (If differs from session)	
Meeting Pattern Days:	TTh	Meeting Pattern Days:	
Meeting Pattern Start Time:	9:35 AM	Meeting Pattern Start Time:	
Meeting Pattern End Time:	10:50 AM	Meeting Pattern End Time:	
		<b>NOTE: Insert rows for multiple meeting patterns if needed</b>	
Enrollment Cap:	35	Enrollment Cap: (Needed for SOC to verify facility id only)	
Class Status:	Active	Class Status:	
Combined Sections ID:		Combined Sections ID: (From Combined sections table)	
Combined Sections Enrollment Total:		Combined Sections Enrollment Total:	

You will enter all changes in this column, as shown in green highlight, which SoC enters in Louie. Leave the row blank if the current field does not need changing.

### 1. Section Number –

- Changes to section numbers should be requested with discretion, especially if the classes are combined.
- Classes, including lectures and stand-alone labs, should be assigned three-digit section numbers (001, 002).
- Zero-unit labs should be assigned letters (A, B).

If lecture/zero-unit lab classes are requested to be rolled up, eLearning will opt out enrollment for zero-unit labs in the BbLearn shell. eLearning identifies zero-unit labs based on the assignment of a letter for the section.

- Stand-alone labs should *not* be assigned letters.

## 2. Session –

- DD sessions are discouraged due to issues they often create for students (Drop/Add dates, Financial Aid, etc.) and manual processes required by internal units. DD sessions should be limited to classes that cannot be offered within a regular session, such as classes that must follow the schedule of FUSD, or a one-unit river-rafting class that will be completed within a couple of weeks.
- If a DD session is required, input DD in the “Enter Changes Here” field, next to session. It isn’t necessary to identify DD1, DD2, DD3. It is necessary for the unit to provide the exact Start Date/End Date, because the date that auto-populates is generic.
  - Please also review the contact hours for DD classes that meet in-person or in blended mode, keeping in mind the number of weeks, number of hours in class, etc. The general requirement for in-person classes is set, by the Arizona Board of Regents, at 750 minutes in-class time per unit of credit. More info below, at bullet 13.
  - For more info regarding contact hours, see [University-Policy \(Course Credit/Units of Credit\)](#) and/or (for Summer sessions) [Academic-Affairs/Summer-Sessions](#).

## 3. Session Start/End Date –

- Units will always need to enter the specific Session start and end dates for *DD classes*—since those that auto-populate will be generic. Provide those dates and SoC will calculate the dynamic-date rule, based on the number of weeks the class is offered. The rule will determine the add/drop/withdraw dates.
- Session dates will populate for regular sessions (M16, M8A, etc.). These dates will never be altered on your worksheet.
  - Remember, if a class begins during the first week of a regular session and ends during the last week of a regular session, it is *not* a DD session, even if the class starts on a Thursday and the session start date is a Monday.

## 4. Component –

- Dual-component classes, such as a lecture/zero-unit lab, require at least two sections. For example, at least one lecture class should be requested, as well as at least one zero-unit lab.
- When building lecture/zero-unit labs, the LEC component will populate for the lecture class. Request the LAB component for the lab class.

## 5. Class Type –

- Zero-unit labs should be identified as Non-Enrollment. All other classes will remain as Enrollment.

## 6. Grading Basis –

- BTH/BIP classes are highlighted on the ERS SoC Worksheet as a reminder that the grading basis must be changed to a grading basis within the parameters of what has been approved at the course level (Curriculum Management→Course Catalog→Course Catalog), such as Letter, Pass/Fail, or Letter in Progress.
- Input the grading basis on the ERS SoC worksheet.
- Classes will remain Tentative until the grading basis is determined and changed.
- IMPORTANT: the grading basis should not be changed once classes are viewable/students are enrolled. Please share this with faculty.

## 7. Min/Max Units –

- If a course is approved to offer min/max units, check with faculty and verify whether different min/max units should be input (1/3 instead of 1/12 units), or if the class should be scheduled for a set number, such as 1 unit or 3 units.
- Please share with faculty that units for topic classes should not be changed after classes are viewable/students are enrolled and that topic classes should be offered for a set unit, rather than as variable.
- Other course lines, such as Independent Study, Research, and Fieldwork, can remain as variable units. If a student enrolls for the incorrect number of units, they may go into their Student Center, click the Enroll tab, locate the correct term and edit the units, until the add/drop/withdraw deadline. There is no need to send in a request for SoC to change units for a non-topic course line that is scheduled as variable units.

## 8. Campus –

- Enter DISLN as the campus for online classes.
- FLGMT, PHBIO or the appropriate statewide location should be input for in-person and blended classes.

## 9. Instruction Mode –

- P (in-person), BL (blended), O (online). Please click on the link, <https://nau.edu/Registrar/Faculty-Resources/Instruction-Modes/>, for definitions and requirements of each instruction mode.

## 10. Topic Title and Topic ID –

- Topic classes should be offered for a set unit, rather than as variable.
- Topics must exist at the Catalog level before they can be associated with a given class and term.
  - To request that a new topic be added at the Catalog level, complete a [New Topic Title Request](#) form, found on the SoC website.
  - Once the new topic exists, you may ask that it be associated with a specific class and term.
- If the topic is determined prior to the submission of the ERS SoC worksheet, add the title and topic ID number to the worksheet.
- If the topic title rolled forward, but a different topic will be offered, input a comment that the topic should be deleted—using the Topic Title and Topic ID row. Enter the replacement topic OR request the topic via the SoC: *New Build/Change Request* form as soon as it is determined.
  - **Topics should be identified and requested for the academic year schedule build that is in progress no later than the first Wednesday of Spring term.** This will allow adequate time to build new topics and/or add topics to topic classes, prior to the publish date (around the end of January). Students should be able to view all classes that will be offered for upcoming terms, at the time classes are published, with the knowledge that additional classes may be added to meet demand.
  - IMPORTANT: Please don't save all your topic requests for January, as the SoC team must then be focusing on room assignments, start-of-term needs, and working to wrap up schedule builds during this time.
- Topic classes should not be published without a topic.
- Topics should *not* be changed after classes are published.

## Facility ID –

- Every in-person or blended class should have a meeting pattern, with the exception of non-topic course lines, such as Independent Study, Fieldwork, Thesis. Synchronous-online classes should also have a meeting pattern. Below is a list of facility ID options for classes that will not be assigned to classrooms by 25Live (classroom assignment system).
  - **ADA Accommodations:**
    - Input the facility ID and provide instructor EMPLID if an instructor has been approved for an ADA accommodation through Disability Resources.
    - Do not wait to request a specific room because it will likely involve the movement of multiple classes if requested after rooms are assigned.
  - **Specialized Equipment:**
    - Input the facility ID if the class is approved to be scheduled as a pre-assignment in a specific room (lab, kitchen, piano...).
    - The class must be listed on the unit's pre-assignment spreadsheet, along with the approved classroom or classroom options.
    - Verify that the room assignment doesn't overlap with another class in your unpublished schedule build, creating a room conflict. (You may find the [Course-planning and Conflict Tool](#) to be useful.)
    - If the classroom is used by another unit for approved pre-assigned classes, follow up with that unit to ensure there are no conflicts.
    - Add a comment to alert SoC this is an approved pre-assignment.
  - **999-TBA:**
    - Input 999-TBA if the class has a meeting pattern but will not meet in a classroom, such as a graduate class that will meet in an instructor's research lab. Failure to do so will result in a room assignment by 25Live (classroom scheduling system), despite the fact that a room isn't needed for a class or a class meeting pattern.
    - Add a class note, on the Notes tab, to clarify where the class will be held or to provide further instructions.
  - **Online Synchronous:**
    - Students meet online at the same time/day. The class should be assigned facility ID CS1074-SYN.
  - **Blended, One-unit, Shorter Session Classes:**
    - Blended, one-unit, and shorter-session classes should be scheduled with another similar size/needs class that will provide a balance. This will prevent a classroom from being used only one half of a term.
    - Add a comment next to the entry of the facility ID to inform SoC about blended, one-unit, or shorter-session classes (ex: M8A, M8B), when another class is scheduled to provide a balance. SoC will ensure that both classes are assigned to the same room. Examples are:
      - ✓ scheduling a blended Monday class at the same time as a blended Wednesday class, both with similar or the same enrollment capacities
      - ✓ scheduling a 1-unit class on Tuesday at the same time as another 1-unit class with a similar capacity on Thursday
      - ✓ scheduling a M8A class with the same meeting pattern and similar capacity as a M8B
        - These classes can use the same room and maximize classroom usage and, if two different classes are offered, this will also allow students an additional option to maximize their schedules.



- Failure to input the facility ID for classes with meeting patterns that should not be assigned to classrooms via 25Live will result in the classes being assigned to classrooms via 25Live. This will use a classroom that isn't required and remove it as an option for a class that needs a classroom.

#### 11. Meeting Pattern Start/End Date -

- Input the meeting pattern start/end date if it differs from the session date. For example, an outdoor adventure class may begin with online instruction, followed by two weekends in the field. The meeting patterns for the weekend field trips will differ from the session start/end dates. This type of class will also require multiple meeting patterns.

#### 12. Meeting Pattern Days/Start/End Time –

- Verify that in-person or blended classes meet for adequate [Contact Hours](#). If a class is blended, only input the meeting pattern for the in-person portion of the class.
- Schedule classes within [Standard Class Meeting Times](#), unless the class has been approved as an exception. Failure to do so limits students' ability to maximize their schedules. It also impacts classroom utilization, final exam schedules, and can reduce or eliminate the 20-minute passing time between classes.
- Input or change meeting patterns for classes that will meet together. If the class rolled forward with an in-person meeting pattern but is now offered online, request to remove the meeting pattern on the appropriate row of the ERS SoC Worksheet.

#### 13. Enrollment Capacity –

- Academic units have access to this field, but still need to input the enrollment capacity on the ERS SoC Worksheet if the class is in-person or blended and requires a classroom.
- **Enrollment capacity should never be increased above the room layout capacity found in [Layout Capacities by Location\\_All 25Live IDs](#), found on the SoC webpage.**
  - *Before* increasing the enrollment capacity beyond the currently assigned room's cap, complete the [Schedule of Classes: Build and Change Request Form](#). SoC will verify if another room is available for the requested meeting pattern and capacity.
- Likewise, notify SoC if the enrollment capacity is substantially decreased. SoC will search to see if a smaller room is available.

#### 14. Class Status –

- Options include Cancelled, Active, or Tentative.
- Remember that Tentative Status is not an option for any online, summer, winter, or statewide class. These classes will automatically move to Active unless an instructor is input and the pay questions are not answered (or are not answered correctly).
  - Tentative classes are not viewable in class search.
  - Classrooms cannot be assigned to Tentative classes.

## 15. Combined Section –

- Enter the combined course information and class information into the Combined Sections Table (Curriculum Management→Combined Sections→Combined Sections Table).
- Input the class subject/ID number in the Table and enter the section number of classes that will be combined in the Identify Combined Sections page.
- Always check the *Skip Meeting Pattern & Instructor* Edit box on the Identify Combined Sections page.
- The only exception to not adding classes to the combined sections table in LOUIE is when a class that is part of a combination didn't roll forward from the previous like-term, e.g., a newly approved course that requires a new build. In these cases, the class can't be added to the table because it isn't assigned a class number until it is built.
  - After SoC completes input of the worksheet and builds the class, the academic unit will be asked to add the combination to the Combined Sections Table.
- Before making changes in fields academic units can access, check on the Meetings or Enrollment Cntrl page of SoC to see if Combined Section link is present. If so, verify whether the change, such as a meeting pattern or instructor change is also required for the other class/es in the combination. All classes that are part of combinations must have matching meeting, topic, and instructor characteristics.
- Approved combinations are viewable in the Class Attribute and Class Value fields on the ERS SoC Worksheet. The field is grayed out since they are informational only.
  - Class Attribute (CSTL = cross-listed) and (CNVN = co-convened)
  - Class Value (course approved to be combined), e.g., ES 191/WGS 191.
- If classes haven't been approved at the course level to be combined, a one-time approval needs to be requested. Send an email to Karina Collentine (graduate) and/or Melinda Treml (undergraduate), with a justification for the combination and attach the syllabi for each class. CC: Registrar.ScheduleofClasses@nau.edu.
- Combinations need to be approved *prior* to the classes being scheduled to meet together – so please allow time for this to happen.

## 16. Combined Section ID –

- If classes in the combined section rolled forward, enter the courses and the class numbers into the combined sections table. Each combination is assigned an ID number. Insert the ID number in the row.

## 17. Combined Section Enrollment Capacity –

- Input the **total** enrollment capacity for all the classes in the combination. If the total isn't correct, it will impact enrollment. For example, if the enrollment capacity for both classes is 15, but 10 is input in the total enrollment capacity field, once the enrollment for both classes reaches 10, even though 5 seats are open, the enrollment will be closed.
- When increasing enrollment capacity, always check to see if the Combined Sections link is populated on the Meetings or Enrollment page of SoC. If it is, navigate to the Combined Sections Table and update the total enrollment capacity.

## “Required & Optional Inputs” Tab

Class: ACC 205 Class Nbr: 1931 Section: 003

Course Title: To Business Law Topic Title: None

		Enter changes HERE:	
Class Attribute:	First Year Learning Initiative, Course Category	Class Attribute: (Informational only)	
Class Value:	Lecture, FYLI Certified	Class Value: (Informational only)	
Section:	003	Section:	
Session:	M16	Session:	
Start Date:	08/24/2020	Start Date: (Only Required for DD sessions)	
End Date:	12/10/2020	End Date: (Only Required for DD sessions)	
Component:	LEC	Component: (LEC/Zero Unit Lab only)	
Class Type:	Enrollment Section	Class Type: (LEC/Zero Unit Lab only)	
Grading Basis:	LTR	Grading Basis: (BTH/BIP only)	
Min/Max Units:	3/3	Min/Max Units: (Variable Unit only)	
Campus:	FLGMT	Campus:	
Instruction Mode:	P	Instruction Mode:	
Topic Title & Topic ID:	0	Topic Title & Topic ID:	
Facility ID:		Facility ID: (Approved Pre-Assignment only)	
Meeting Pattern Start Date:	8/24/2020	Meeting Pattern Start Date: (If differs from session)	
Meeting Pattern End Date:	12/10/2020	Meeting Pattern End Date: (If differs from session)	
Meeting Pattern Days:	MW	Meeting Pattern Days:	
Meeting Pattern Start Time:	5:30 PM	Meeting Pattern Start Time:	
Meeting Pattern End Time:	6:45 PM	Meeting Pattern End Time:	
		<b>NOTE: Insert rows for multiple meeting patterns if needed</b>	
Enrollment Cap:	60	Enrollment Cap: (Needed for SOC to verify facility id only)	
Class Status:	Active	Class Status:	
Combined Sections ID:		Combined Sections ID: (From Combined section table)	
Combined Sections Enrollment Total:		Combined Sections Enrollment Total:	
<b>DATA FIELDS FOR UNIT ENTRY - NOT REQUIRED:</b>		<b>SoC does not enter this info, but you may find it helpful for planning/tracking</b>	
Primary Instruction Section:			1
Schedule Print:			2
Instructor Emplid:			3
Instructor Name:			4
Instructor Role:			5
Print:			6
Grade Roster Access:			7
Eval:			8
Add Consent:			9
Enrollment Capacity:			10
Wait List Capacity:			11
Auto Enroll Wait List:			12
Reserve Start Date:			13
Reserve Requirement Group:			14
Reserve Requirement Capacity:			15
Class Notes:			16

Fields available to units to enter directly in Louie are found on the "Required & Optional Inputs" tab, in the shaded table labeled "Data Fields For Unit Entry- Not Required". You may enter data here which may be helpful for your own schedule planning needs.

Definitions	Required Inputs	Required & Optional Inputs	New Class Template	Raw Data	Documentation
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It is not necessary for academic unit schedulers to add the data fields for unit entry, into the ERS SoC Worksheet. Schedulers have access to add this data directly into LOUIE. **The only exceptions are:**

- the accurate enrollment capacity for all in-person and blended classes needs to be input in LOUIE by the scheduler, in addition to being entered on the ERS SoC Worksheet
- class notes that provide necessary clarification

## 1. Primary Instruction Section –

- When an instructor teaches multiple sections of the same course and the session, units, grading basis, mode of instruction, and topic are consistent for each section, the instructor may request to roll the sections into one primary instruction section. This will create one Learning Management System (LMS) BbLearn shell, so the instructor will not need to repeat the same class content for each BbLearn shell.
- The process for rolling up sections of a course into one BbLearn shell is as follows:
  - change all the primary instruction section numbers to match one of the section numbers. For example, if an instructor is teaching sections 001, 002 and 004. Change two of the primary instruction section numbers to match one of the three, so all three numbers are the same. The section numbers will be different, but the primary instruction section numbers will be consistent.
- Remind instructors it is very important for them to let you know if any of the rolled-up sections need to be unrolled or if another section is added. Rolled up sections cannot be changed once the class begins because student work cannot be moved from the BbLearn shell, only content can be moved. If any changes are necessary to sections that are rolled up, prior to the start of the class, send an email to at [Lms-faculty-help@nau.edu](mailto:Lms-faculty-help@nau.edu) with the changes detailed. **The initial request for roll-ups feeds automatically to BbLearn, but changes *do not*.**

## 2. Schedule Print -

- Only uncheck Schedule Print if a class should NOT be viewable in the class search. Advisors will still see the class; however, students and guests will not. For example, departments may prefer to not print an Independent Study class in the class search, since these classes are requested by a student to meet their specific needs.
- If you're unsure if you're going to offer something, it should rather be set to Tentative. The guideline is "Schedule Print OFF is not an option for classes that should be Tentative. Classes that are Active should be visible to students, with the few exceptions of Course Lines, such Fieldwork, Undergraduate Research, Senior Seminar, Independent Study, etc."

## 3. Instructor ID -

- Input the instructor ID or click on the magnifying glass to look up an instructor's name. Once the instructor ID populates, hit the tab key and the instructor's name will appear. It is not uncommon to have the same or similar instructor names, so be certain to select the correct ID and, if necessary, verify this information with the instructor. An instructor must be input for each meeting pattern.
  - Click "View All" whenever adding multiple instructors for a meeting pattern. This will avoid duplicating instructors and ensure all the instructors have been added.
  - Click the plus (+) button to add another instructor.

## 4. Instructor Role -

- Select the instructor role. Definitions, as well as how the roles correspond to roles in LMS (BbLearn) are found under *Training & Building Resources* on the [SoC webpage](#). It is very important this information is correct for reporting purposes. Hovering over the icon next to the instructor role will populate the definition for each instructor role.

## 5. Print -

- Print populates if the primary instructor role is selected. If the instructor is checked to "Print", they will be viewable in Class Search as the contact for the class. If the primary instructor should *not* be the contact, uncheck Print and remember to also check Print for the appropriate instructor.

## 6. Access -

- Select Approve or Grade Access from the drop down box. Access controls mid-term and final Grade Roster access.
- Approve access will allow the instructor to both input grades and approve the grades to be sent to Registrar Grades.
- Grade access will only allow the ability to enter grades.
- **There must be one instructor with approve access for each class, prior to the start of the class.**
- 699 and 799 classes will be built with Karina Collentine and Kelly Janecek of the Graduate College as graders with approve access. The primary instructor will have no grade access.

## 7. Eval -

- The Eval checkbox is used to map an instructor to receive a student evaluation.
  - All primary instructors are automatically checked to be evaluated. If a primary instructor should not be evaluated, uncheck the box.
  - Secondary instructors are not automatically checked to be evaluated, but can be checked if appropriate.
  - TAs are not automatically checked to be evaluated, but can be checked if appropriate.
  - A steward should most likely not be checked to be evaluated.
- Be sure to map evaluations prior to the start of the term or as soon as an instructor is identified. This will ensure instructor evaluations are set up prior to the date the data is batched and sent to CoursEval.

## 8. Consent -

- If the class is approved at the course level to require consent, select Instructor Consent or Department Consent in the Add Consent drop down box.
  - A note should be added to the Notes page providing direction for students – phone number, office – details about how to obtain consent.
- Do not use *Consent Required* to abridge the add deadline. Remember that classes should allow enrollment until the add deadline. An academic unit must receive approval from the Vice Provost of Academic Affairs before a class can shorten the add deadline date. SoC needs to be copied on such email requests because the approval documentation is updated by this office.

## 9. Enrollment Capacity -

- Input the enrollment capacity. This should be completed before the schedule build is final. The enrollment capacity should be thoughtfully assessed and reflect the anticipated enrollment in the class. If the enrollment capacity isn't input and a facility ID is required, no room will be assigned. A classroom can't be assigned to a class with no capacity.
- Refer to the Course Demand and Projections Report sent by the Provosts Office, along with other essential reports and information found on the [Vice Provost/Academic Affairs website](#). The report will serve as a guide for the number of sections required for specified classes.
- The enrollment capacity should never be changed to zero, unless the class will be cancelled.
- The enrollment capacity should never be increased beyond the layout capacity of the classroom, even if you feel the room can accommodate more students. The layout capacity for a classroom populates next to the facility ID on the Meetings page of LOUIE, once the room is assigned. Refer to the Layout Capacities by Location report on the [Schedule of Classes webpage](#) to verify a classroom's layout capacity.
- If there is a need to view the Class Roster, navigate to Curriculum Management>Class Roster>Class Roster and input the class details. Find the correct section and click on Enrollment Status and select Enrollment.

## 10. Wait List Capacity -

- Wait list capacity and enrollment capacity should always be the same.
- **Do not set up wait list for the following classes:**
  - dynamically dated
  - lecture/zero-unit lab
  - co-requisites
  - combined sections, with the exception of a regular class combined with an honors class if the enrollment capacity is set to 1 or 2
- If there is a need to view the Wait List Roster, navigate to Curriculum Management>Class Roster>Class Roster and input the class details. Find the correct section and click on Enrollment Status and select Wait List to view the Wait List Roster.

## 11. Auto Enroll from Wait List -

- The Auto Enroll from Wait List box should be checked for any class that will allow students to wait list.

## 12. Reserve Start Date -

- Insert the start date for the reserve requirement group (generally the day it is entered).

## 13. Requirement Group -

- Input the requirement group. Refer to the list of the most commonly used requirement groups, which is found under the heading, *Additional Materials*, on the [Schedule of Classes webpage](#).

## 14. Capacity Enrollment -

- Instruction for capacity enrollment are as follows:
  - Insert the capacity enrollment (the number of students for whom seats will be reserved).
  - If the enrollment capacity needs to be changed or if a release date needs to be added, click on the plus (+) button to add another row.
  - Input the effective date for the change or release, using the identical reserve requirement group number.
  - Input the new capacity enrollment.
  - If releasing a reserve, input the number 1.
  - All changes to the capacity enrollment for a specific requirement group will be made within the same reserve capacity sequence.
- If a class has multiple reserve groups, click the plus (+) button in the reserve capacity heading to add another requirement group number. Each requirement group that is added has a different reserve capacity sequence number.
- When a student enrollment request is processed, the system automatically searches through the reserve capacities in sequential order and places the student in the first group with an available spot for which the student qualifies, based on the reserve capacity group rules.

## 15. Class Notes:

- Pre-defined Notes:
  - Click on the magnifying glass for a list of pre-defined notes and select the appropriate note number.
  - If verbiage needs to be added to an existing note, click on Copy Note, and the existing note will copy in the free format text box, where the note can be customized.
- Free Format Text:
  - Add a free format note by typing in the free format text box.
  - Topic descriptions do not populate in LOUIE – only the title is present. To assist students in better understanding the topic offered, copy and paste the topic description into the free format text box on the Notes page.
  - If a free format note is used on a regular basis, request a permanent, pre-defined, note. Once built, select the note ID number, rather than typing the note for each applicable class.
- Multiple Notes:
  - Click the plus (+) button to add more than one note. You cannot add both a pre-defined note and a free format note in the same block. The plus button will duplicate another blank block and select either a pre-defined note or write a free format note.
- Dynamically dated, blended, and online classes:
  - These classes require predefined class notes. The notes will populate once the class is saved and exited. Do not remove these notes from classes.

## “New Class Template” Tab

2	Subject:
3	<b>NEW CLASS</b>
4	Course Subject/Number:
5	Course Title:
6	<b>DATA FIELDS FOR SOC ENTRY:</b>
7	Class Attribute:
8	Class Value:
9	Section:
10	Session:
11	Start Date:
12	End Date:
13	Component:
14	Class Type:
15	Grading Basis:
16	Min/Max Units:
17	Campus:
18	Instruction Mode:
19	Topic Title & Topic ID:
20	Facility ID:
21	Meeting Pattern Start Date:
22	Meeting Pattern End Date:
23	Meeting Pattern Days:
24	Meeting Pattern Start Time:
25	Meeting Pattern End Time:
26	Enrollment Capacity:
27	Class Status:
28	Combined Sections ID:
29	Combined Sections Enrollment Total:
30	<b>DATA FIELDS FOR UNIT ENTRY - NOT REQUIRED:</b> SoC does not enter this info, but you may find it helpful for planning/tracking
31	Primary Instruction Section:
32	Schedule Print:
33	Instructor Emplid:
34	Instructor Name:
35	Instructor Roster Access:
36	Print:
37	Print:
38	Eval:
39	Add Consent:
40	Enrollment Capacity:
41	Wait List Capacity:

Use a blank template on this New Class Template tab to build a new class. Copy & paste the template into the Required Inputs tab in sequential order (ex: if there are currently sections 001-003 and you need another section added, you will paste the blank template under section 003.)

The New Class Template tab includes both data fields for SoC entry (rows 2-29) and data fields for unit entry (rows 30-47). You are only required to copy & paste rows 2-29 for SoC entry. You may copy & paste the additional rows only if you would like.

The green highlighted rows (30-47) are optional

You will copy & paste blank template into this tab

Definitions Required Inputs Required & Optional Inputs **New Class Template**



## How to Input a Textbox to Provide Clarity

You may insert a textbox or type your comments into the appropriate row. For example, if you need to provide clarification for a class scheduled outside standard meeting times, type your comments in the "Enter changes Here" row next to one of the meeting pattern rows.

**Insert** | Text Box

	A	B	C	D	E	F	G	H	I
1846									
1847	Class: CHM 485 Class Nbr: 2661 Section: 009								
1848	Course Title: Undergraduate Research Topic Title: None								
1849	Enter changes HERE:								
1850	Class Attribute:		Class Attribute: (Informational only)						
1851	Class Value:		Class Value: (Informational only)						
1852	Section:	009	Section:						
1853	Session:	M16	Session:						
1854	Start Date:	08/26/2019	Start Date: (Only Required for DD sessions)						
1855	End Date:	12/13/2019	End Date: (Only Required for DD sessions)						
1856	Component:	LEC	Component: (LEC/Zero Unit Lab only)						
1857	Class Type:	Enrollment Section	Class Type: (LEC/Zero Unit Lab only)						
1858	Grading Basis:	FWE	Grading Basis: (BTH/BIP only)						
1859	Min/Max Units:	1/6	Min/Max Units: (Variable Unit only)						
1860	Campus:	FLGMT	Campus:						
1861	Instruction Mode:	P	Instruction Mode:						
1862	Topic Title & Topic ID:	0	Topic Title & Topic ID:						
1863	Facility ID:		Facility ID: (Approved Pre-Assignment only)						
1864	Meeting Pattern Start Date:	8/26/2019	Meeting Pattern Start Date: (If differs from session)						
1865	Meeting Pattern End Date:	12/13/2019	Meeting Pattern End Date: (If differs from session)						
1866	Meeting Pattern Days:		Meeting Pattern Days:						
1867	Meeting Pattern Start Time:		Meeting Pattern Start Time:						
1868	Meeting Pattern End Time:		Meeting Pattern End Time:						
1869			NOTE: Insert rows for multiple meeting patterns if needed						
1870	Enrollment Cap:	2	Enrollment Cap: (Needed for SOC to verify facility id only)						
1871	Class Status:	Active	Class Status:						
1872	Combined Sections ID:		Combined Sections ID:(From Combined sections table)						
1873	Combined Sections Enrollment Total:		Combined Sections Enrollment Total:						
1874									

Add a textbox to alert SoC about unique scheduling situations. This will prevent SoC from the need to contact units and request clarification.

Click on the "Insert" tab of Excel and select "Text Box".

Examples of reasons to use a text box are-

"Labs are scheduled 10 minutes apart"

"This class is combined with \_\_\_\_\_ and received a onetime approval on 4/16/19"

"Two classes, \_\_\_\_\_, and \_\_\_\_\_ use the same Facility ID of \_\_\_\_\_ as approved pre-assignments, but are not in the room at the same time. Classes alternate meeting times."

## Examples - How to Input Changes on ERS SoC Worksheets

In the ERS SoC worksheet shown below, the following changes are requested (shown in green highlight):

- Topic Title
- Session
- Units
- Enrollment Capacity
- Class Status
- Meeting/Pattern - add additional meeting pattern/s by inserting a row or, if additional meeting pattern/s rolled forward and additional columns are present showing each meeting pattern, simply type the changes or note a required deletion

<b>Class: EE 490 Class Nbr: 4037 Section: 003</b>			
Course Title: Adv Topics In Electrical Egr Topic Title: None			
			Enter changes HERE:
Class Attribute:	Course Category	Class Attribute: (Informational only)	
Class Value:	Lecture	Class Value: (Informational only)	
Section:	003	Section:	
Session:	M16	Session:	M8A
Start Date:	01/13/2020	Start Date: (Only Required for DD sessions)	
End Date:	05/08/2020	End Date: (Only Required for DD sessions)	
Component:	LEC	Component: (LEC/Zero Unit Lab only)	
Class Type:	Enrollment Section	Class Type: (LEC/Zero Unit Lab only)	
Grading Basis:	LTR	Grading Basis: (BTH/BIP only)	
Min/Max Units:	1/3	Min/Max Units: (Variable Unit only)	3
Instruction Mode:	P	Instruction Mode:	
Topic Title & Topic ID:	0	Topic Title & Topic ID:	INTRO TO COMPUTER VISION Topic ID #5
Facility ID:		Facility ID: (Approved Pre-Assignment only)	
Meeting Pattern Start Date:	1/13/2020	Meeting Pattern Start Date: (If differs from session)	
Meeting Pattern End Date:	5/8/2020	Meeting Pattern End Date: (If differs from session)	
Meeting Pattern Days:		Meeting Pattern Days:	MW
Meeting Pattern Start Time:		Meeting Pattern Start Time:	12:45pm
Meeting Pattern End Time:		Meeting Pattern End Time:	2:00pm
	Add second meeting pattern		F
			1:00pm
			2:00pm
		<b>NOTE: Insert rows for multiple meeting patterns if needed</b>	
Enrollment Cap:	20	Enrollment Cap: (Needed for SOC to verify facility id only)	45
Class Status:	Cancelled Section	Class Status:	Active
Combined Sections ID:		Combined Sections ID:(From Combined sections table)	
Combined Sections Enrollment Total:		Combined Sections Enrollment Total:	

## Adding Rows to Excel Worksheet

The screenshot shows an Excel worksheet with the 'Insert' menu open. A red arrow points to the 'Insert' option in the 'Cells' group. Another red arrow points to row 1535 in the worksheet, which is highlighted. A red callout box contains the following text:

To add a new row, select the row below where you wish to insert another row. In this case, we want to add another meeting pattern, so row 1535 is highlighted. Click the arrow under "Insert" and select "insert sheet rows". A new row will populate.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1515	Class: EE 490 Class Nbr: 4037 Section: 003												
1516	Course Title: Adv Topics In Electrical Egr Topic Title: None												
1517	Enter changes HERE:												
1518	Class Attribute:	Course Category	Class Attribute: (Informational only)										
1519	Class Value:	Lecture	Class Value: (Informational only)										
1520	Section:	003	Session:										
1521	Session:	M16	Start Date: (Only Required for DD sessions)										
1522	Start Date:	01/13/2020	End Date: (Only Required for DD sessions)										
1523	End Date:	05/08/2020	Component: (LEC/Zero Unit Lab only)										
1524	Component:	LEC	Class Type: (LEC/Zero Unit Lab only)										
1525	Class Type:	Enrollment Section	Grading Basis: (BTH/BIP only)										
1526	Grading Basis:	LTR	Min/Max Units: (Variable Unit only)										
1527	Min/Max Units:	1/3	Instruction Mode:										
1528	Instruction Mode:	P	Topic Title & Topic ID:										
1529	Topic Title & Topic ID:	0	Facility ID: (Approved Pre-Assignment only)										
1530	Facility ID:		Meeting Pattern Start Date: (If differs from session)										
1531	Meeting Pattern Start Date:	1/13/2020	Meeting Pattern End Date: (If differs from session)										
1532	Meeting Pattern End Date:	5/8/2020	Meeting Pattern Days:										
1533	Meeting Pattern Days:		Meeting Pattern Start Time:										
1534	Meeting Pattern Start Time:		Meeting Pattern End Time:										
1535	Meeting Pattern End Time:		NOTE: Insert rows for multiple meeting patterns if needed										
1536			Enrollment Cap: (Needed for SOC to verify facility id only)										
1537	Enrollment Cap:	20	Class Status:										
1538	Class Status:	Cancelled Section	Combined Sections ID: (From Combined sections table)										
1539	Combined Sections ID:		Combined Sections Enrollment Total:										
1540	Combined Sections Enrollment Total:												
1541													