Learn from Your Peers: Creating the “Perfect” Class Schedule
Rebecca Farris, Christopher Coffey, Genevieve Cecil, Lori Harris
See Appendix A for combined presentation slides.

• Rebecca Farris, Philosophy
  o Process: The associate chair begins the scheduling process and solicits requests from faculty and assigns the courses to the faculty. Once the courses being taught are decided, Rebecca solicits faculty meeting pattern preferences and gives them an internal deadline (48 hours). Using paper, she maps everything out and then edits the courses in ConnectCarolina (CC) line-by-line. Rebecca then schedules classes and preferences in Astra. Once complete, she exports from Astra to Excel for a quality assurance check. Philosophy places heavy emphasis on reserving seats for incoming first-year students, and Rebecca has developed good relationships with the New Student Program/Academic Advising to help with this work.
  o Best practices: write down everything you do and date it; keep accurate records of all transactions and requests/submissions; contact cross-listed departments early (one of your first steps); submit honors form early; map everything out on paper beforehand; monitor class enrollment via CC query; for additional QA, Rebecca also does class searches from the student’s perspective to ensure that transactions/requests have gone through; utilize the scheduling office (for section books, which show reserve capacities and end dates).

• Christopher Coffey, Psychology and Neuroscience
  o Process: The Psychology Instructional Committee determines funding allocation and graduate student teaching resources before they work with faculty to determine the class schedule. Christopher then creates a template with TA allocations, seat count review, and previous year’s schedule, and sends it to the program directors in the six program areas who send to their faculty to solicit teaching requests (deadline for requests is Nov 15). Once all faculty teaching requests are back in, Christopher creates a draft schedule. The Instructional Committee reviews a first draft, and there is a back-and-forth until a firm schedule is created. Christopher then inputs the data into CC.
  o Best practices: use schedule templates (see Appendix B); be flexible if you have graduate students or others leave teaching or TA assignments last-minute due to other funding opportunities.

• Genevieve Cecil, Political Science
Process: Genevieve focused on similarities and differences and her experience as a relatively new SSM. She is new to the Political Science Department, and previously worked in History as an SSM. Both departments have associate chairs as the faculty liaisons; they choose what is being taught. History sent out a paper document; Political Science uses a Google Form to solicit faculty requests.

Best practices: organization is key; there’s no down time in this position; write down all your notes and tips in a central location so you can find the information when you don’t remember; know your resources; keep notes on who helps with what; make good working relationships with your partners (especially with whom you share cross-lists); know that you will make mistakes, but they are always fixable; ask for help when you need it; time permitting, take a moment to educate your faculty when they have a request to change the schedule so they can be aware of how much work goes into making these changes.

Lori Harris, Asian Studies

Process: Lori starts by manually creating a scheduling spreadsheet. Each tab has a different item related to the class schedule for the term: (e.g., TTH and WWF tabs). There is a three-person team to spot check the schedule across the spreadsheet, CC, and Astra during Extended Class Schedule Maintenance (ECM).

Best practices: Keeping everything in one place is helpful for this process. The single spreadsheet workbook contains most things she needs for the schedule and she and fellow staff members are constantly referring to it during the active semester, but also afterward for enrollment counts, etc. Lori also has information for faculty on the Asian Studies’ intranet about scheduling process and policies. She has a checklist available for department coordinators in the language programs to use. She also provides registration FAQ for students on Asian Studies website. Use class notes. It’s a very helpful thing for giving students information, and the more schedulers use it, the more students will look at it. Use the enrollment request search function, which gives the transactional history of the enrollment process; build in room for others to do their jobs so you can finish yours; give the artificial deadlines in advance of the real deadline.

Areas of improvement: Lori is developing a list of all scheduling tasks that need to be accomplished with an eye to building a complete schedule of tasks to which she can assign deadlines. She’s also trying to up her cross-list game since Asian Studies is starting to sponsor more cross-lists. Lori is more familiar with the non-sponsor side of cross-lists. She therefore tries very hard to be a good working partner with the non-sponsoring units of cross-lists owned by Asian Studies.

After the presentations, Rebecca, with support from her fellow presenters, shared a wish list of items that would be helpful to SSMs as they work on scheduling classes. The Office of Undergraduate Curricula will share these items with the Office of the Registrar.

Since SSM had questions concerning the enrollment process, Charlotte Stowe conducted a brief, impromptu tutorial on the Enrollment Request Search option in CC. This produces an audit trail for every enrollment transaction in a class within a specified term. If you don’t know the class number, as you search the class number field, one trick is to put in a “p” to decrease the loading time. The enrollment request ID can also be input to look up an individual student’s transaction history. You can check the error message to see what prevented a student from enrolling in the class, and the enrollment request audit trail can also be exported to Excel. See Appendix C for instructions.
Timeline: Catalog pages will be released to editors in early February 2018. Departments will have until March 15, 2018 to make and submit changes to their Catalog pages. The 2018-2019 Catalog will go live on June 1, 2018.

Access and Editing
- All department pages go through two steps within the department (editors and approvers).
- In mid-January, departments will receive a list of their Catalog users. Any updates should be submitted using the online form available through the Office of the Registrar: http://registrar.unc.edu/courses/catalog/.
- Each role has three options in workflow: edit the page, rollback the page, and approve the page.
- Rollback can be sent to any previous editor and requires a comment/explanation.
- Approval button moves it to a new step in workflow. If more than one person is assigned to a role, make sure that all have made edits before one approves the page to move to the next step.
- Left/right navigation on the editing bar is used to view additional editing tabs.
- Green and red markup can be turned on and off and filtered by user.
- You can generate a PDF of the current state (with changes) to share with those who don’t have CAT access.
- If you have multiple programs in your department, you will get an email for each program.

Curriculum Inventory Manager (CIM) Update
  Roger Kaplan
- A Course Request Approval System (CRAS) replacement that is on the horizon.
- CIM is by the same vendor as the Catalog (CourseLeaf), so it will be a familiar environment.
- You can upload multiple files in this system.
- The goal is to go live with CIM in March 2018.
- A second part of the system will manage the curricula and programs (after the course portion is up and running, so a year out potentially).

Records and Registration Update
  Roberta Norwood
New registrar is doing some reorganization. The separate areas of records and registration have been combined into one unit, Records and Registration Services. Listserv, shared emails, etc. are being combined, and as of September, all phone calls for registration and records questions will go to the same line.

Next Meeting: Wednesday, April 11, 2018 @ 10:30am

Previous agendas and minutes: http://curricula.unc.edu/committees/ssmmeetings/
Learn from Your Peers
Creating the “Perfect” Class Schedule

Student Services Managers
December 13, 2017
Rebecca Farris, Philosophy
A. CHAIR = COURSE ASSIGNMENTS (October-November)

- Need/Demand
- Teaching Preferences & Admin Docs
- Historical Enrollments

Late Nov/Early Dec

SSM = COURSE SCHEDULE (December)

- Distribution of Classes
- Priority Classroom Space
- Scheduling Preferences & History
General timeline of SSM course scheduling...

**DECEMBER-JANUARY**

- Contact cross-listed departments (via email)
  - Add/cancel requests
- Solicit faculty scheduling prefs (via email – give deadline!)
  - Distribution of classes (hard copy)
  - Department priority rooms (hard copy grids)
- Honors planning form (submit online)
- Map everything out on paper, THEN cancel and schedule in CC
  - Line by line in numerical order in Maintain Schedule of Classes
  - Make notes of what I cancelled when
  - Save often
- Combined section logs (submit online all at once)
- Add reserve capacities/notes
  - End date=last day of early registration (unless 384)
  - FR/SO, PPE minors, PHIL majors/minors
    - 100 and 200-level courses: HALF FR/SO + PPE (if applicable)
    - 300-level courses: TWO THIRDS for PHIL maj/min + PPE (if applicable)
- Enter classroom assignments and prefs in Astra
  - Generate schedule spreadsheet (class numbers, notes, RCs, enrollment caps, etc.)
General timeline of SSM course scheduling...

**FEBRUARY**
- NSO requests seats
  - Coordinate requests with faculty

**MARCH**
- Notify instructors of reserve caps (via email – give deadline for changes)
- Add waitlists per request (via email – give deadline for additions)
- ECSM: Visiting faculty and grad student course assignments (repeat December-January tasks)

**APRIL**
- Registration begins
- RCs end in late April
- Monitor class enrollments
  - Query: NC_SR_CLASS_ENROLL_BY_SUBJECT
Tips!

- Make notes of everything you do (including dates)
  - Emails are a useful reference
- Utilize the Scheduling Office
  - Section Books
    - Show RCs and end dates
- Double-check during ECSM
  - Re-pull Astra spreadsheet
  - Class search to double-check cross-listed courses
- 8 Teaching Professors
- 46 Tenure-Track Faculty
- 124 Graduate Students
  - Maximum of 1 assignment per semester
  - IA, TA, TF
- 6 Program Areas (Each has a Faculty Director)
  - Clinical
  - Social
  - Behavioral & Integrative Neuroscience
  - Quantitative
  - Developmental
  - Cognitive
- Instructional Committee
  - Director of Graduate Studies
  - Director of Undergraduate Studies
  - Student Services Manager
  - Department Manager
  - Assistant Department Manager
  - Chair
Program TA allocations decided by Instructional Committee (around 120 semester slots) Early October

Template created using TA allocations, seat count review, and previous years schedule Mid October

Template schedule emailed to the 6 Programs and Teaching Professors November 1st

Review Draft 1 with Instructional Committee December

Start plugging in and create Draft 1 of Schedule Early December

Program and Teaching Professor teaching requests due by November 15

Send Draft 1 to Programs and Teaching Professors January

Make requested edits and begin creating Draft 2

Repeat Ad Nauseam until on Draft 15+

Notes
- Graduate Student assignments begin in early spring but aren’t finalized until after admissions season ends (typically finalized by end of May)
- Teaching Professor course release request (1 course reduction per teaching professor per AY)
- 90% of seats in 200 level courses restricted to majors only for first 2 weeks of registration
Genevieve Cecil, Political Science
SIMILARITIES & DIFFERENCES

• SIMILARITIES
  • Both HIST and POLI are considered part of the social and behavioral sciences, which means they have similar undergraduate needs and requirements.
  • Both majors are flexible in terms of the order in which courses can be taken
  • Both majors require students to take an advanced level seminar, where seats are reserved for majors during registration periods using course reserve capacities and enrollment restrictions.

• DIFFERENCES
  • POLI offers more large enrollment courses; it is typical for me to have between 3-6 courses with 10+ recitations, where HIST offers more small enrollment courses
  • POLI collects faculty teaching preferences online through a Google Doc survey, versus the use of paper forms in HIST
COOKS IN THE KITCHEN: WHO’S INVOLVED

• Associate Chair or DUS:
  • This individual coordinates the selection of courses for a given term. S/he interacts with the faculty and field chairs (if applicable) to ensure that the department’s requirements and needs are being met each term (i.e., are we in compliance regarding the number of Honors courses offered each academic year, do we have a good balance of courses by field, etc.).

• Undergraduate Coordinator or SSM:
  • This individual fulfills the role of department registrar and makes sure that the Associate Chair’s selected courses are entered correctly into Connect Carolina. S/he works closely with the Associate Chair to make sure that department and college policies are followed and the department remains in compliance.
THE STRUGGLE IS REAL

- **Volume**: there is really no ‘ideal’ time in the year to start this position because everything runs in a preparatory cycle, usually about a year in advance. I started in August, a few days before classes began for the fall term. It was exciting.

- **Organization**: this is a job made up of details and systems; learning these things takes TIME. Unlike other positions within the University, there is no standard suite of information and access given to incoming SSMs. This is because every department varies in terms of the tasks the SSM covers. I was ‘fortunate’ that in my position I covered a lot of them.
BUT, SO IS THE SUCCESS

• **Write it down.** A lot of student services work is repetitive, but you can save yourself some hassle by asking for answers and instructions in written form. I had a binder where I kept a hard copy of every question and answer I asked, so that when I repeated the action down the road I had a reference.

• **Know your resources.** I made a list of everyone I interacted with or received an email from – other coordinators, individuals such as Nick and Ben, Renee Sherman in the Registrar’s Office, and the entire Scheduling team. I then made an address book and included the reason(s) for contacting each individual next to their contact info.
BASIC TIPS & TRICKS

• Get to know your fellow administrators, especially those with whom you share cross listed courses. A good working relationship goes a long way when you have a crisis.

• Know that you WILL make mistakes. You will forget things, you will give or receive incorrect information, you will misinterpret things.

• Ask for help. By checking in with those around you such as the Registrar, the Scheduling team, or your fellow coordinators you will learn about bugs in the system, methods for tackling tricky courses, and ways to handle difficult or unusual requests.

• You can send candy via Campus Mail. Scheduling also accepts microwave popcorn. 😊
BONUS: SCHEDULING SCENARIO

Great, thank you!

Let's go ahead and bump him up to 300 & bump 271 down to 120. Three of those 271 sections are minimally enrolled so let's cancel and maybe re-purpose the room assignments to 203. Is that easy to do??

Thanks!

Subject: Swapping Recitation Rooms for POLI 203 and 271

Hi Lauren,

As a head’s up, we will be closing three recitations in POLI 271 (sections 605, 606, and 608) and giving those meeting times and rooms to POLI 203 (sections 612, 613, 614). The latter will need to be created in the system.

For the sake of clarity, I am going to do the following:

1. Move the students out of 271.605, 606, 608. — this is complete
2. Close recitations 271.605, 606, 608. — this is complete
3. Adjust the maximum lecture enrollment for 271.001 to 120 (down from 180). — this is complete
4. Submit course create forms for 203.612, 613, 614 with the meeting days/times for 271.605, 606, 608.
5. Submit course cancel forms for 271.605, 606, 608.
6. Once the additional recitations for 203 have been created I will adjust the maximum lecture enrollment to 300 (up from 240).

Thank you!
Genevieve
Department of Asian Studies

- ~40 people teaching each semester
- In fall 2017, offered 95 sections of 50 courses
- No graduate program
- In Social Sciences division, but teaching 8 different foreign languages
- Very decentralized structure (language programs)
- Many crosslisted courses; interdisciplinary major
- Dedicated rooms for 4-day language classes (nonstandard schedule)
- 3 other priority rooms
- No Student Services position; manager & admin support share duties
- Lori has been scheduling for >13 years
One XL Spreadsheet
To Rule Them All

Basic schedule info: classes, rooms, instructors, seats, etc.

Enrollment tracking during summer

Schedule grids for assigning rooms (TR, MWF, 4-day)

Content courses: restrictions & division of seats

Alternate enrollment scenarios

Language courses: section projections & time slot allocations

Faculty workload: leaves, course releases, overloads, uneven workload, teaching in other departments
There’s Always Room For Improvement: What I’m Working On

• Better documentation and planning of scheduling processes
• Master process calendar that includes everything
• Improved schedule request form
• Updated crosslist information
Creating Departmental Resources

For Faculty:
Instructions on scheduling process and policies; available on department intranet.

For Department Coordinators:
A checklist (see handout).

For Students (and Faculty):
A registration FAQ
http://asianstudies.unc.edu/registration-faq/
Miscellaneous Tips

• Cross-check your schedule
• Use Class Notes
• Enrollment Request Search
• Waitlisting strategies & pitfalls
Wants/wishes/dreams!

- Cross-listed courses
  - Combined/linked rosters in CC
  - Total course enrollment numbers visible in CC queries/Astra
  - Non-sponsor sections included in Section Books (to check RCs and notes)
- Terms in residence vs. credit hours earned RCs (helpful for FR/SO)
- Honors and CCO courses
  - More descriptive “Department Consent” to add restriction (notes often not read by students trying to register)
- “0” in front of FYS courses so they appear first in Astra section list
- Class numbers visible in Astra (including cross-listed!)
## Appendix B

DEPARTMENT OF PSYCHOLOGY  
Teaching Schedule 2018-2019 DRAFT

### Fall 2018

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### DEPARTMENT OF PSYCHOLOGY  
Teaching Schedule 2018-2019 DRAFT

Appendix B

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Accessing the Enrollment Request Search

Student Admin Menu > Records and Enrollment > Enroll Students > Enrollment Request Search

Leave the Academic Institution box blank and click the Search button.

Common Search Parameters:

1. Term: ConnectCarolina term code
2. User ID: Onyen of the person who processed the enrollment action
3. ID: PID of the student for whom the enrollment action was processed
4. Class Nbr: The unique number assigned to the section. This is listed on the Basic Data Tab in Maintain Schedule of Classes.
The results can be exported to Excel.

If a user wants to see the messages the student received when they tried to enroll, they can copy the number in the Enrollment Request ID column, then search for it in Enrollment Request (Student Admin Menu > Records and Enrollment > Enroll Students > Enrollment Request).
Appendix D

University Catalog Editing Process

Student Services Managers
December 13, 2017
Catalog Workflow

Step 1: February 1 – March 15, 2018
- Department Editor(s)
- Department Approver

Step 2: March 15 – May 15, 2018
- OUC/GRAD Reviews
- Registrar Reviews

Role names:
- CAT-COMM-UGRD-Editor
- CAT-COMM-UGRD-Approver
# Users and Access

<table>
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<th>Mid-January 2018</th>
<th>Departments will receive a list of their Catalog users and roles. Please review carefully. If users need to be removed or added, submit request using online form.</th>
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</thead>
</table>
| **Role Names**   | **CAT-DEPT-UGRD Editor**  
|                  | (e.g., DUS, directors, student services managers)*  
|                  | **CAT-DEPT-UGRD Approver**  
|                  | (e.g., chair)  
|                  | **CAT-DEPT-GRAD Editor**  
|                  | (e.g., DGS, directors, student services managers)*  
|                  | **CAT-DEPT-GRAD Approver** |

* If more than 1 person is assigned to a role, please coordinate with all users to make sure edits are made before 1 person advances the page to the next step in workflow.
# Production Timeline

<table>
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<th>Date Range</th>
<th>Event Description</th>
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<tr>
<td>February 1 – March 15, 2018</td>
<td>Departments/units make edits.</td>
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<tr>
<td>March 15, 2018</td>
<td>Department/unit deadline!</td>
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<td>March 15 – April 15, 2018</td>
<td>• Office of Undergraduate Curricula reviews all undergraduate Catalog pages.</td>
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<td>• Graduate School reviews all graduate Catalog pages.</td>
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<tr>
<td>April 15 – May 15, 2018</td>
<td>University Registrar reviews all Catalog pages.</td>
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<td>June 1, 2018</td>
<td>Publish the 2018-19 University Catalog at <a href="http://catalog.unc.edu">http://catalog.unc.edu</a></td>
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Reminders

All course data is pulled from Connect Carolina. This cannot be updated through the Catalog editing process.

Program requirements are edited by the Office of Undergraduate Curricula based on approved curriculum changes.

Please contact the Office of Undergraduate Curricula if you would like to add a sample plan to your program page.