

Contents

Logging In	4
Navigating to the Section Editor	6
Changing the Viewing Term	9
Configuring Your Scheduling Environment	10
Notification Events	10
Adding/Editing Notification Events	10
Notification Event Timeline	12
Future Action Dates	13
Phases	14
Room ‘Allowed Sections’	15
Global Blackout Dates in Events	16
Recurrence Patterns for Blackout Dates	19
Rollovers	20
How to Perform a Rollover	21
Sections Rollover	22
Relationships Rollover	27
Creating/Adding Relationships (Linked Sections)	32
Creating a Relationship via Relationship Dashboard	32
Creating a Relationship via Section Editor	40
Deleting a Linked Section Relationship	48
Class Roll	49
Performing a Class Roll	50
Cancelling Class Sections	54
Reviewing and Finalizing a Department’s Schedule	57
Reviewing Data in the Section Editor	57
Activity Log	61
Inline Integration Errors	62
Viewing the Calendar in the Section Editor	64
Calendar View	64
List View	66
Rooms View	66
Filters	67
Running the Room Optimizer	70
Creating a Run	70
Settings that Do Not Change	72

Cancelled Sections in the Optimizer	72
Combined Maximum Enrollment in the Optimizer	73
Optimizer Potential Conflicts/Issues	74
Optimizer Settings	74
General Settings	74
Example of Minimum Seat Utilization Setting	76
Advanced Settings	82
Priority Preferences	83
Example of using Weights in Advanced Settings	86
Section Conflicts	87
Room Bottleneck	89
Running The Optimizer	90
Optimizer Results Dashboard	92
Viewing Results	93
Conflicts	95
Exports	95
Bottlenecks	96
Input Settings	96
Merging Results	97
Bulk Merge	97
Single Merge	98
Exam Scheduling	98
Manually Schedule an Exam	98
Exam Meeting Pattern for Exam Optimizer	101
Exam Optimizer	104
General Settings	105
Optimizer Errors	106
Optimize	107
Exam Optimizer Results	107
Results	107
Export	108
Reviewing the Final Schedule	109
Auditing the Schedule in the Section Editor	109
Reports	110
Viewing and Filtering Reports	110
Downloading Reports	113
Integration Error Reports	114

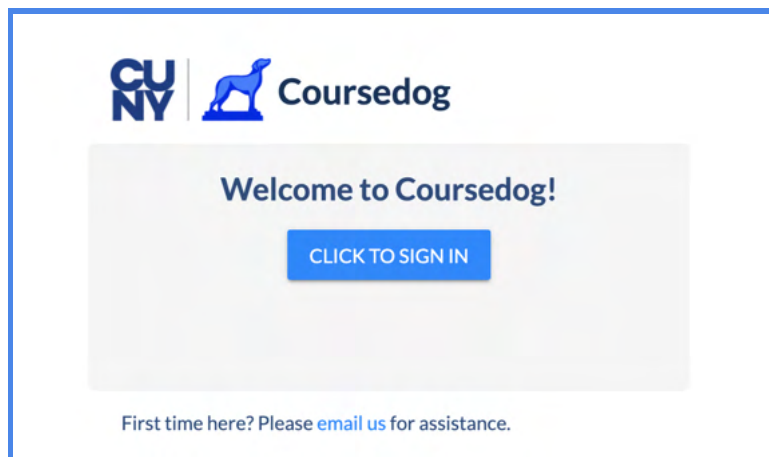
Real Time Integration	115
Reviewing a Section Change Request	116
Handling Change Requests	117
Request Reset Options	122
Requests Columns and Saved Views	124
Coursedog Support Model	127
Level 1 - Solution Articles	127
In Coursedog	127
Online Support Center	128
Level 2 - Submitting Support Tickets	130
Level 3 - CUNY Support	131
Appendix	132
Daily Digest	132

Logging In

For production: log in at coursedog.cuny.edu

For training and testing: log in at coursedog-test.cuny.edu

1. Select 'Click to Sign In'



2. You will be redirected to CUNY's SSO login page, where you can enter your CUNYFirst credentials.

CUNY

Web Applications Login

If you are logging into a University cloud service offering, such as Dropbox or Microsoft Office 365 for Education, you agree to abide by the terms in the [CUNY Acceptable Use of University Data in the Cloud policy](#).

Log in with your [CUNY Login credentials](#):

Username

Password

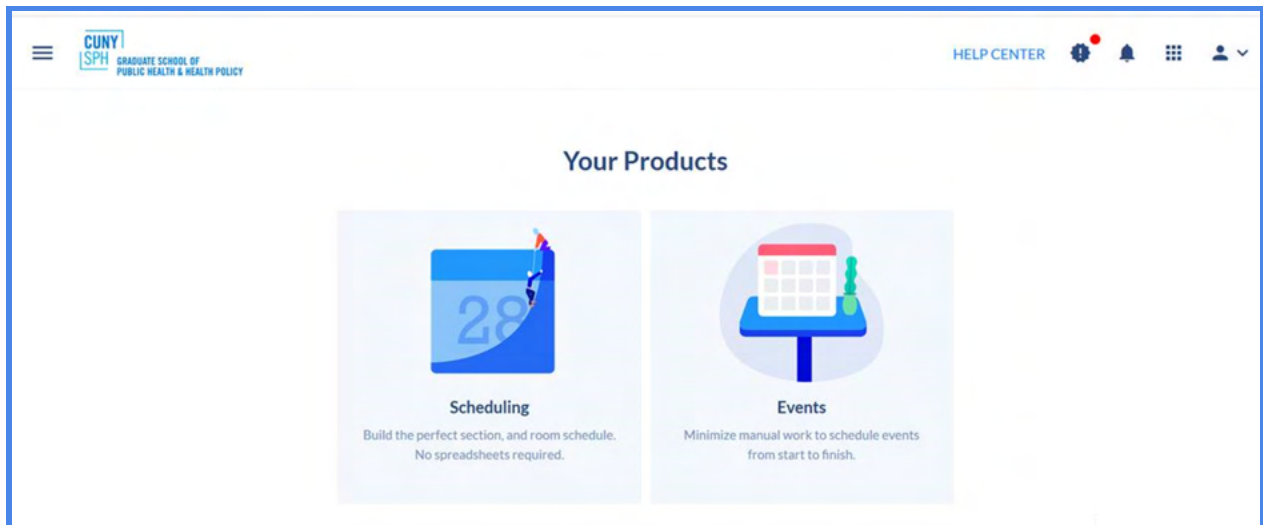
[> Forgot Password](#) > [New User](#)
> [Forgot Username](#) > [Manage your Account](#)

PROTECT YOUR PERSONAL INFORMATION AND PRIVACY

ONLY enter your CUNY Login password on CUNY Login websites (ssologin.cuny.edu and login.cuny.edu). NEVER share it with others or enter your CUNY Login password elsewhere without the approval of your campus IT department. More information on CUNY's policies regarding user accounts and credentials can be found in the [Acceptable Use of Computer Resources Policy](#).

Note: The system times out after 90 minutes of inactivity. You must have the Security (from your Academic Institution/Org) and the Campus Administrator role association in CUNYFirst to have Campus Admin role access in Coursedog. Additionally, your BUSN email must be checked off on your CUNYfirst account.

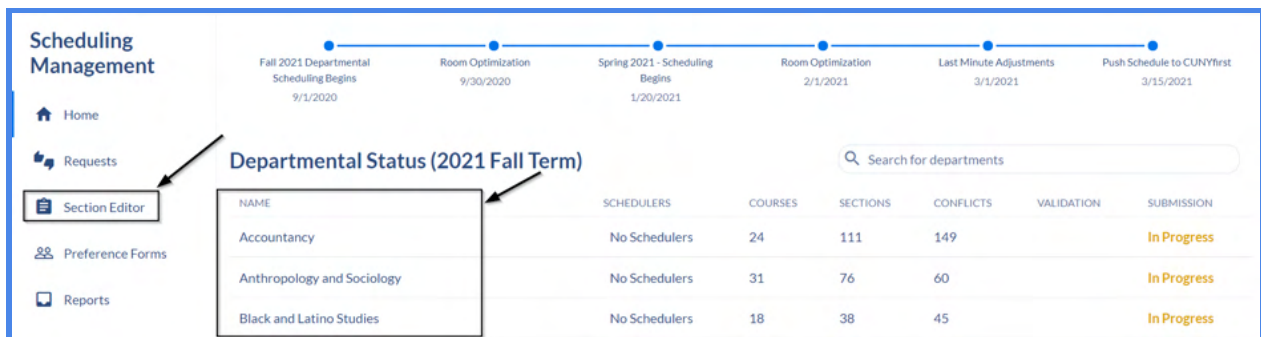
3. When you are logged in, validate that you can see the Scheduling and Events Products.



Navigating to the Section Editor

In order to view and manage the Schedule of Classes for a particular Terms, there are two ways this can be done:

- 1) Click **“Section Editor”** on the left navigation if you want to see **all** sections you are permitted to view.
- 2) Or click on an individual department, underneath **“Departmental Status”** to see sections within specific department(s).

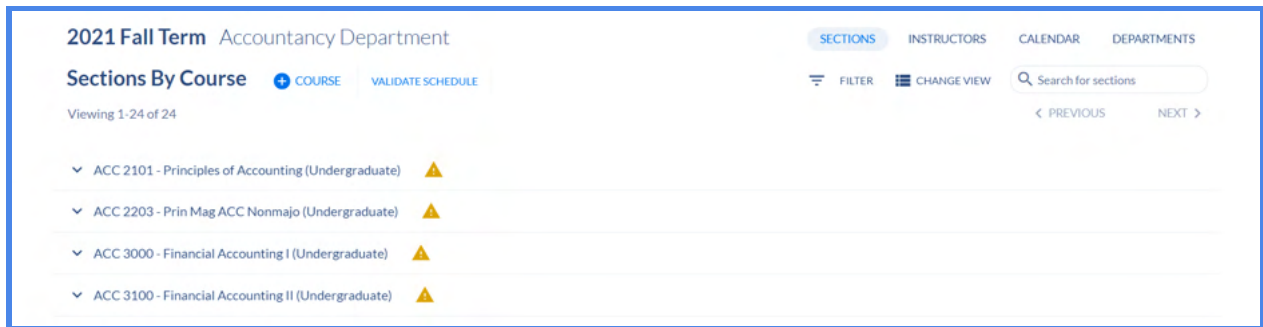


The screenshot shows the 'Scheduling Management' interface. On the left is a navigation sidebar with 'Section Editor' highlighted. The main content area features a timeline of scheduling events: 'Fall 2021 Departmental Scheduling Begins' (9/1/2020), 'Room Optimization' (9/30/2020), 'Spring 2021 - Scheduling Begins' (1/20/2021), 'Room Optimization' (2/1/2021), 'Last Minute Adjustments' (3/1/2021), and 'Push Schedule to CUNYfirst' (3/15/2021). Below the timeline is the 'Departmental Status (2021 Fall Term)' section, which includes a search bar and a table of departmental data.

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	VALIDATION	SUBMISSION
Accountancy	No Schedulers	24	111	149		In Progress
Anthropology and Sociology	No Schedulers	31	76	60		In Progress
Black and Latino Studies	No Schedulers	18	38	45		In Progress

Note: The department data shown above (Courses, Sections, Conflicts, Status) refreshes each time the user logs in.

- 3) In the “**Section Editor**”, by default, you will be presented with a list of all courses in the department that can be expanded to show their sections:



2021 Fall Term Accountancy Department

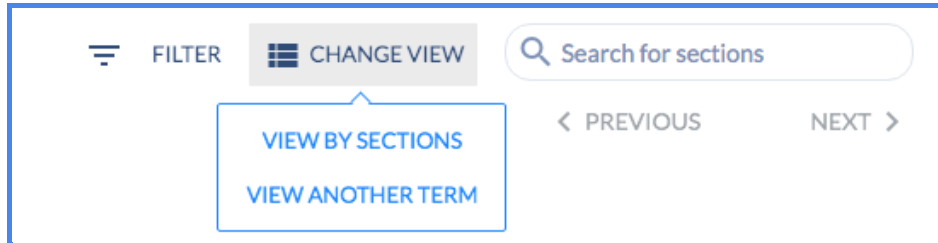
Sections By Course [+ COURSE](#) [VALIDATE SCHEDULE](#)

Viewing 1-24 of 24

- ACC 2101 - Principles of Accounting (Undergraduate) ⚠
- ACC 2203 - Prin Mag ACC Nonmajo (Undergraduate) ⚠
- ACC 3000 - Financial Accounting I (Undergraduate) ⚠
- ACC 3100 - Financial Accounting II (Undergraduate) ⚠

Note: Next to each course that is scheduled for the upcoming term, the Academic Career will display next to it to notify users which Academic Career this Course belongs to. This will also show in the Section Editor of the Class Section.

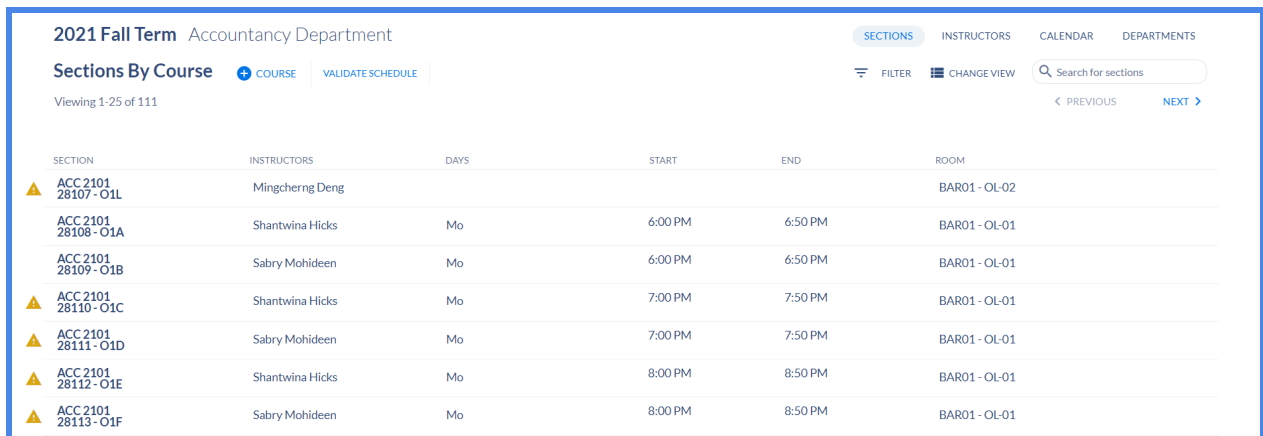
- 4) In order to change the view to all class sections, next to the Search engine field on the top right corner, click “**CHANGE VIEW**” and select “**VIEW BY SECTIONS**” on the top right corner of the screen.



[FILTER](#) [CHANGE VIEW](#)

[VIEW BY SECTIONS](#)
[VIEW ANOTHER TERM](#)

[PREVIOUS](#) [NEXT](#)



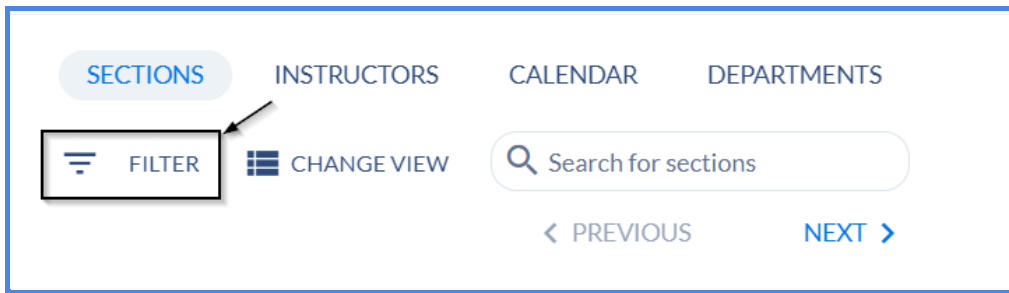
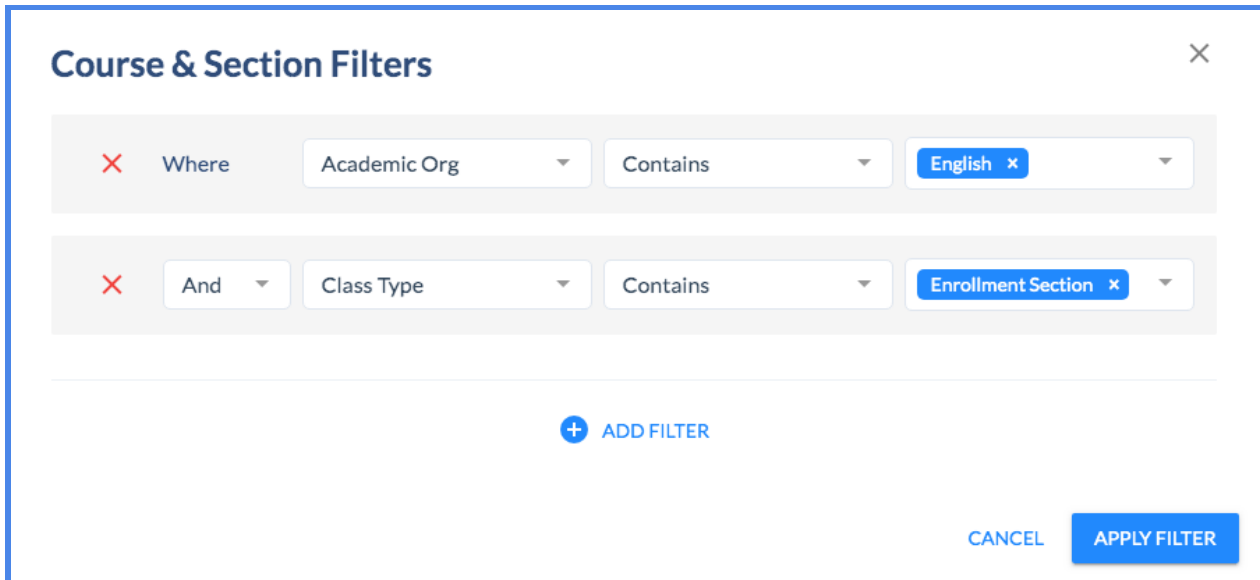
2021 Fall Term Accountancy Department

Sections By Course [+ COURSE](#) [VALIDATE SCHEDULE](#)

Viewing 1-25 of 111

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
⚠ ACC 2101 28107 - O1L	Mingcherrng Deng				BAR01 - OL-02
ACC 2101 28108 - O1A	Shantwina Hicks	Mo	6:00 PM	6:50 PM	BAR01 - OL-01
ACC 2101 28109 - O1B	Sabry Mohideen	Mo	6:00 PM	6:50 PM	BAR01 - OL-01
⚠ ACC 2101 28110 - O1C	Shantwina Hicks	Mo	7:00 PM	7:50 PM	BAR01 - OL-01
⚠ ACC 2101 28111 - O1D	Sabry Mohideen	Mo	7:00 PM	7:50 PM	BAR01 - OL-01
⚠ ACC 2101 28112 - O1E	Shantwina Hicks	Mo	8:00 PM	8:50 PM	BAR01 - OL-01
⚠ ACC 2101 28113 - O1F	Sabry Mohideen	Mo	8:00 PM	8:50 PM	BAR01 - OL-01

- 5) In order to make navigating the schedule easier, you can filter the courses or sections that are being displayed by selecting the “**FILTER**” button next to the and use the filters.

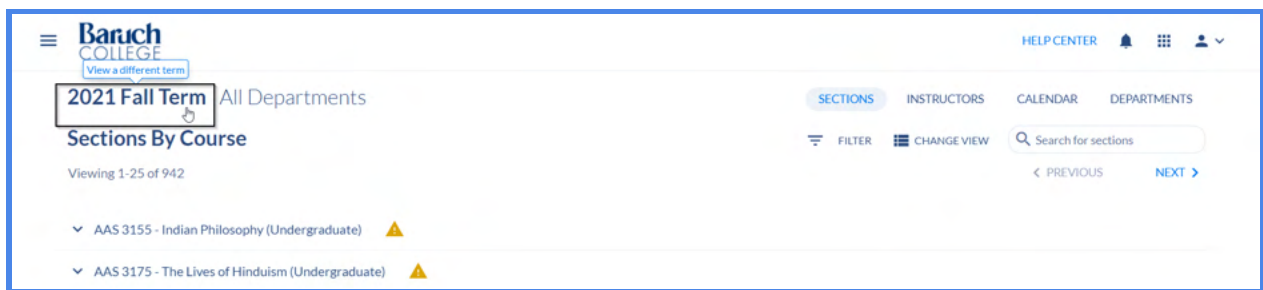



A screenshot of the 'Course & Section Filters' dialog box. It contains two filter rules. The first rule is 'Where' with 'Academic Org' selected in the dropdown, 'Contains' in the operator dropdown, and 'English' in the value dropdown. The second rule is 'And' with 'Class Type' selected in the dropdown, 'Contains' in the operator dropdown, and 'Enrollment Section' in the value dropdown. There is an 'ADD FILTER' button with a plus sign, and 'CANCEL' and 'APPLY FILTER' buttons at the bottom right.

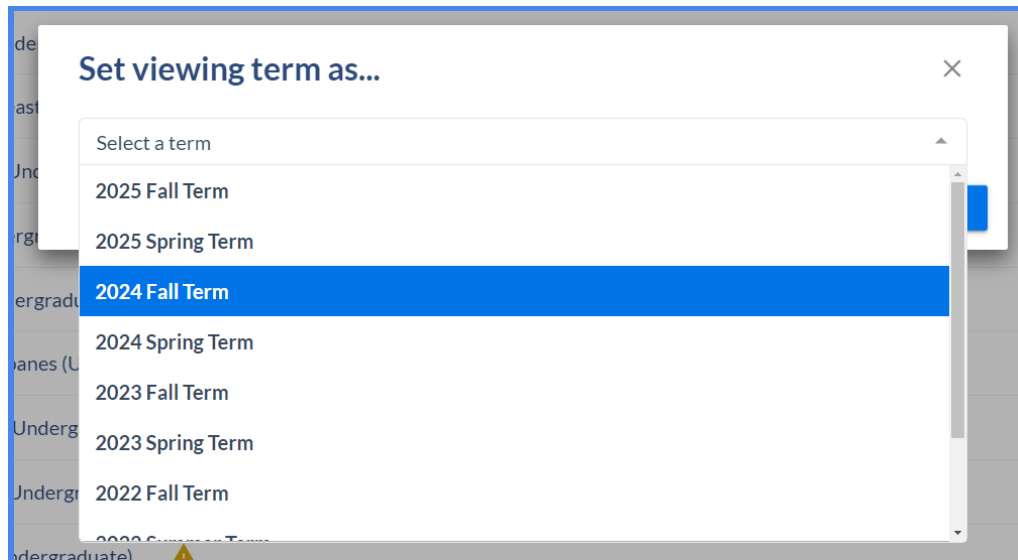
Note: If you are searching "By Courses," the filter results will show all courses where at least one section matches filter criteria. If you search "By Sections," it will only show relevant sections that meet filter criteria: details can be found in this [freshdesk article](#)

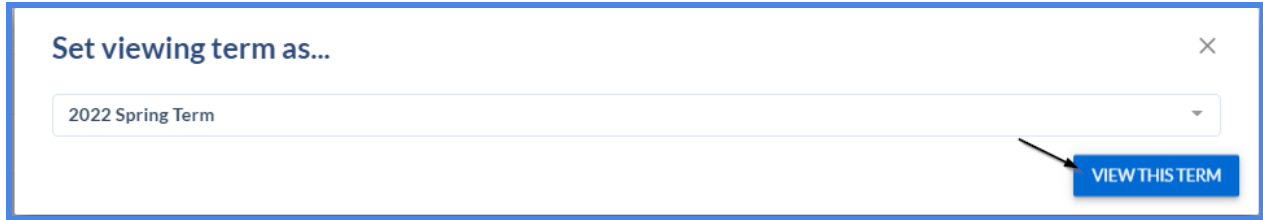
Changing the Viewing Term

- 1) To change the term select the term in the upper-left corner. Hovering over the term will cause 'View a different term' to appear:



- 2) Select the viewing term from the drop down menu before selecting the '**VIEW THIS TERM**' button.





Note: *Scheduling Campus Admin and Scheduling Faculty Workload Coordinators have access to view Historical Terms (i.e. For Purposes of Recreation of Records/Faculty Workload Edits etc...).*

Configuring Your Scheduling Environment

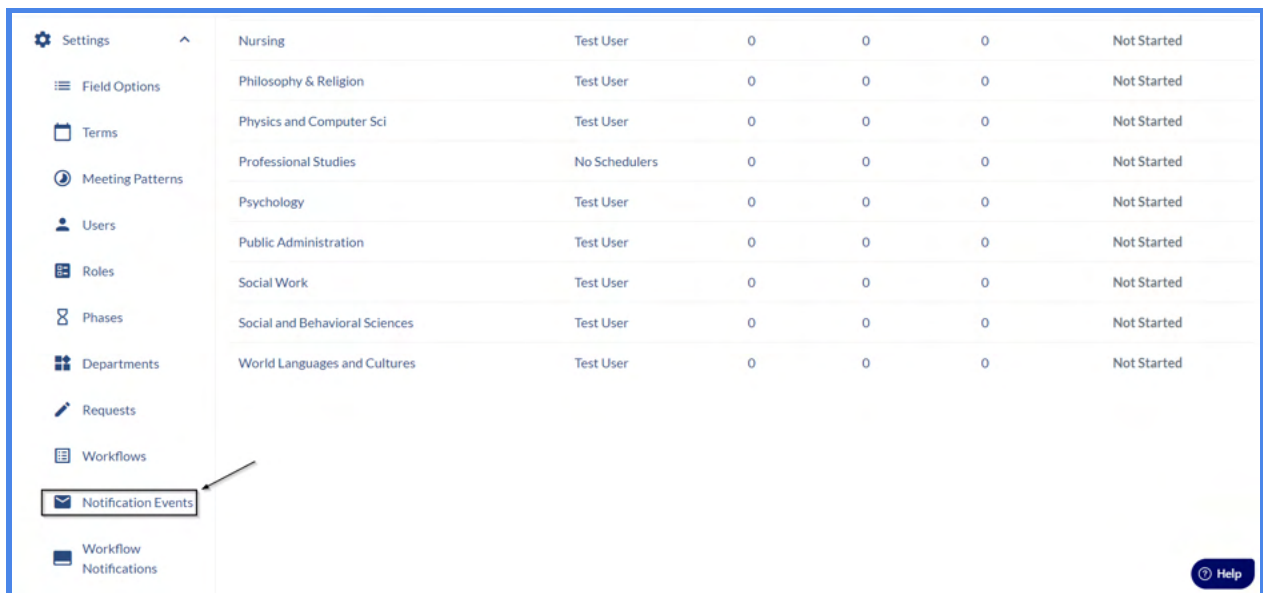
The below configuration items should be set up prior to department schedulers getting access to the system.

Notification Events

Notification Events enable administrative users to configure a customizable notification to send to other users. This is most often used to notify users of all upcoming key dates in the academic scheduling cycle. When event notifications are sent out, users will receive a notification within Coursedog and over email.

Adding/Editing Notification Events

1. Notification Events can be added and edited in Settings → Notification Events



- To add an event, click on the “+ Event” button on the top of the page. When clicked, the following modal will appear with the below settings:

Notification Events			
+ EVENT			
EVENT NAME	SEND AT	CREATED BY	STATUS
Scheduling Begins	4/1/2020		Sent
Room Optimization	5/10/2020		Not Sent
Last Minute Adjustments	5/20/2020		Not Sent
Push Schedule to SIS	6/1/2020		Not Sent

- Event Name - This is the name of the event, and also the subject line of the email to be sent
 - To All Users - Select this if the notification should be sent to all users
 - To Specific Users - If the notification is being sent to specific users, populate this field with the users who should receive the notification
 - To Specific Roles - If the notification is being sent to specific roles, populate this field with the roles that should receive this notification
 - Send Date - The date the notification is sent (by default it is sent at 12:01AM PST)
 - Status - Indicates whether or not the notification has been sent
 - Template - Enter the content of the notification which will be delivered within Coursedog and over email
 - Add Attachment - Add any attachments you would like delivered with the notification event
- Once you have filled out the above settings, select ‘**Add Event**’

Add New Notification Event ✕

Event Name

To All Users

To Specific Users

To Specific Roles


Display Terms (For displaying event on timeline)
 All terms or

Send Date

Status

Email Subject

Email Body




Attachments

Notification Event Timeline




The upcoming timeline of notification events will be displayed on the Coursedog Home page above the Departmental Status table. This can be used to identify the upcoming steps in the scheduling process.

- Notification Events that have passed will appear as a blue circle
- Upcoming notification events will appear as a grey circle

☰



Baruch College

Help Center   

Scheduling Management

- 🏠 Home
- 🗨️ Requests
- 📁 Section Editor
- 👤 Preference Forms

●
Scheduling Begins
4/1/2020

●
Room Optimization
5/10/2020

●
Last Minute Adjustments
5/20/2020

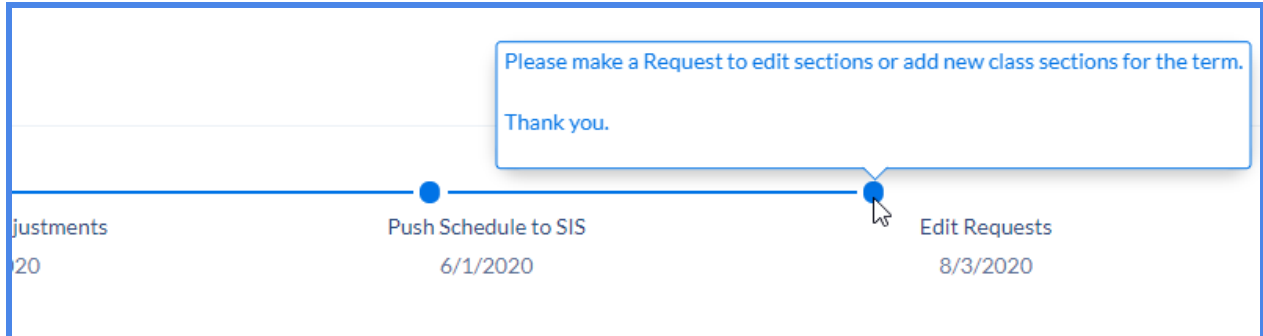
●
Push Schedule to SIS
6/1/2020

Departmental Status (2020 Fall Term) 🔍 Search for departments

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	STATUS
Accountancy	No Schedulers	24	95	0	In Progress
Administration	No Schedulers	0	0	0	Not Started

12

Note: If you are sending the notification event(s) to specific users/roles, the user will be able to see the message displayed on the notification event timeline by hovering over the notification event itself.



Future Action Dates

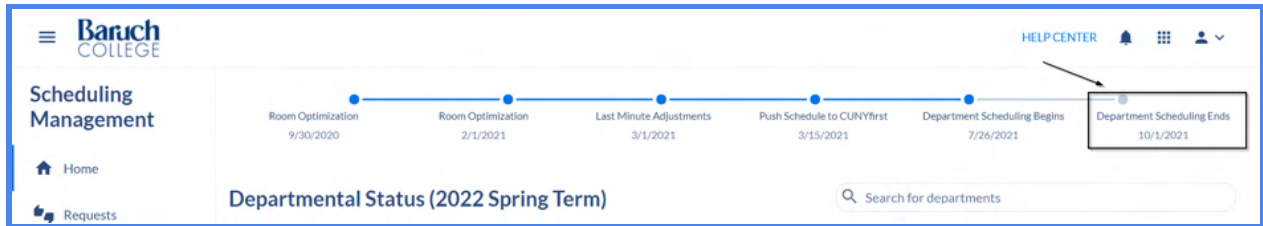
At a certain point in the scheduling cycle Department Schedulers can have their access to editing the schedule freely revoked. Future Action Dates can be utilized to accomplish this. When a Future Action Date defines which permissions should be locked for Department Schedulers and is sent on a specific date, this will notify the users via email/notification event(s) that it has been executed. After this point in time they will need to submit requests for any changes they would like made to any of their departments' sections in the schedule.

For example, when Department Schedulers finalize their class schedule for Fall 2021 by February 7th 2021, February 8th 2021 and onwards, Department Schedulers will need to submit requests to any changes they would like made on their class schedule.

Note: Please consult with CUNY OUR to assist in the creation of Phases to be attached to a Future Action Date (See 'Phases' section below).

Once the date of a Future Action Date has been executed ('Send Date'), the 'Roles' field will permanently change permissions to match what is located in the future action 'Permissions.' Once this action takes place the **roles are set until another future action date updates them.**

After the date has passed, the **future action no longer** has any functionality. If you change the 'Send Date' of a future action that has already occurred, this does not undo the role change; it simply adds a new trigger to update permissions on the new send date. Future Action 'Send Date' will activate @3:01 a.m. EST. Send date must be at least 24 hours before it is executed.



Phases

Phases are a combination of role and field permissions and can be associated with the terms as your scheduling cycle changes, rather than having to depend on manual changes to role and field permissions as this happens. When a phase is associated with a term, and a user is within that term in scheduling, the permissions defined in phases will override the default permissions set in either Roles or the Section Template.

Phases can also be attached to a *Future Action Date*, so that the phase can be executed on a specific date and will be notified to the specific users via email and shown on the Notification Event Timeline on the homepage.

For example, "Department Scheduling Begins" phase for all Department Schedulers to create the schedule for Summer/Fall 2021 Terms will start on 03/15/21 (All fields in the Section Editor are editable).

The screenshot shows the 'Scheduling Management' interface. At the top, a progress timeline includes: Spring 2021 Proofs due July 1, 2021 (6/28/2020), Fall 2021 Departmental Scheduling Begins (9/1/2020), Room Optimization (9/30/2020), Room Optimization (2/1/2021), Last Minute Adjustments (3/1/2021), and Push Schedule to CUNYfirst (3/15/2021). The current phase is 'Department Scheduling Begins'. Below the timeline is a table titled 'Departmental Status (2022 Spring Term)' with a search bar and a table of data.

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	STATUS
Accountancy	Test User, WORKFLOW USER and 2 others	2	1	0	Submitted

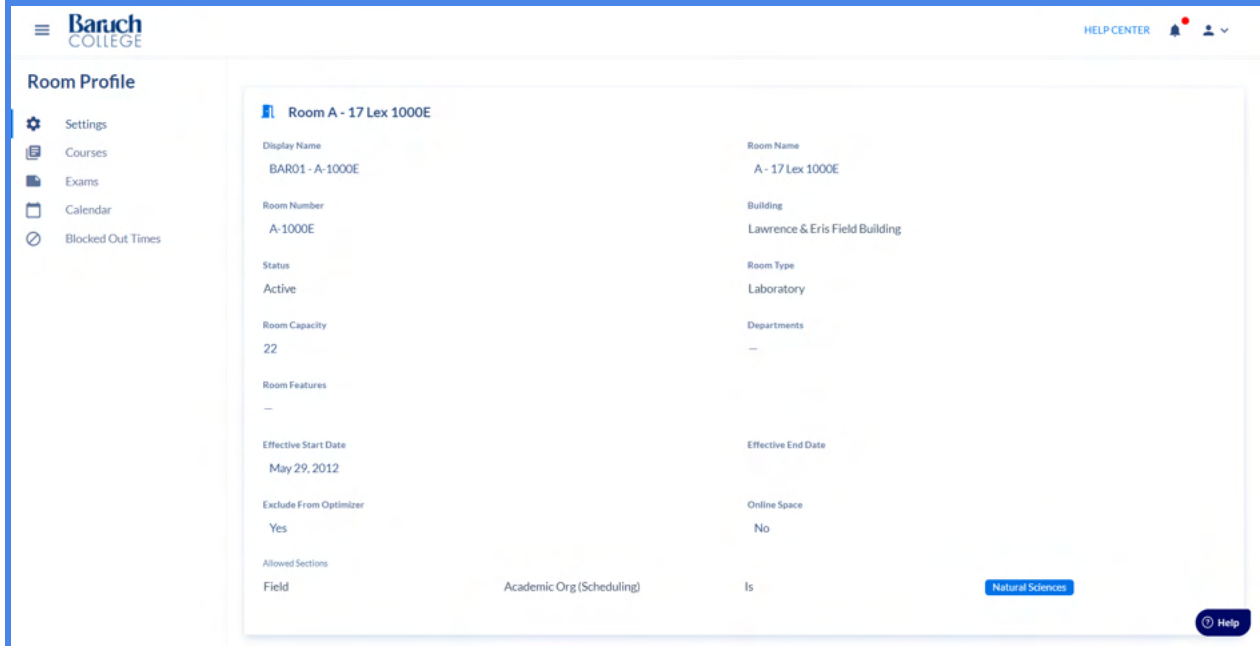
The “Scheduling Edit Requests” phase for all Department Schedulers to stop creating the schedule of classes for the Summer/Fall 2021 Terms and start initiating Requests for Section Changes and/or Adding New Sections (All fields in the Section Editor are locked and view only).

Note: Scheduling Campus Admin should reach out to CUNY OUR to be able to assist in implementing the Phases for their Campus so that this can be created in their Respective Instances and be used accordingly based on Scheduling business process.

Room ‘Allowed Sections’

In Coursedog’s Scheduling Management System, you can manage exactly what types of sections are allowed to be scheduled in each room.

For example, room A-1000E is a Laboratory Classroom and it should only be assigned to Biology and Chemistry courses within the Natural Sciences Department. If Allowed Sections fields are configured only for Biology and Chemistry Courses, this facility will only be used for these courses when manually assigning rooms or running the optimizer.



Baruch COLLEGE

Room Profile

- Settings
- Courses
- Exams
- Calendar
- Blocked Out Times

Room A - 17 Lex 1000E

Display Name	BAR01 - A-1000E	Room Name	A - 17 Lex 1000E
Room Number	A-1000E	Building	Lawrence & Eris Field Building
Status	Active	Room Type	Laboratory
Room Capacity	22	Departments	—
Room Features	—	Effective End Date	
Effective Start Date	May 29, 2012	Online Space	No
Exclude From Optimizer	Yes	Allowed Sections	
Field	Academic Org (Scheduling)	Is	Natural Sciences

Help

Note: Setting the ‘Allowed Sections’ fields for particular rooms are hard constraints, where if the user searches for these rooms in the Section Editor within a course that does not fall under the allowed fields defined in the Room Profile, they will not be able to see the room. Please consult with CUNY OUR if you have facilities that are truly owned by specific departments/courses where no other courses/sections can be scheduled in, a list of these facilities will be sent for you to fill out for them to complete this process.

Global Blackout Dates in Events

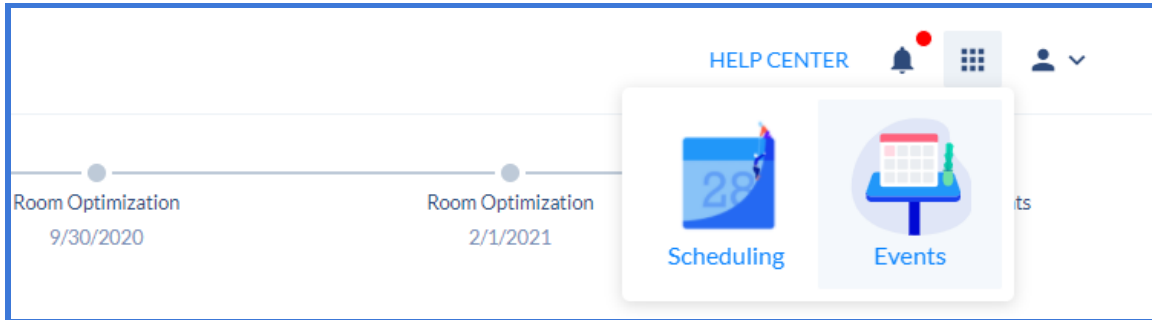
Global blackout dates can be used to make rooms unavailable for events while academic scheduling is occurring.

For example if the Spring 2021 term is currently being scheduled, and runs from January 1st - May 7th, campus admins can blackout this date range to ensure all users in events will not be able to book any event within that window of time due to conflicts that could arise from classroom use. Once the schedule is finalized for Spring 2021 campus admins can remove these blackout dates so that events can be booked during this time around academic class meetings.

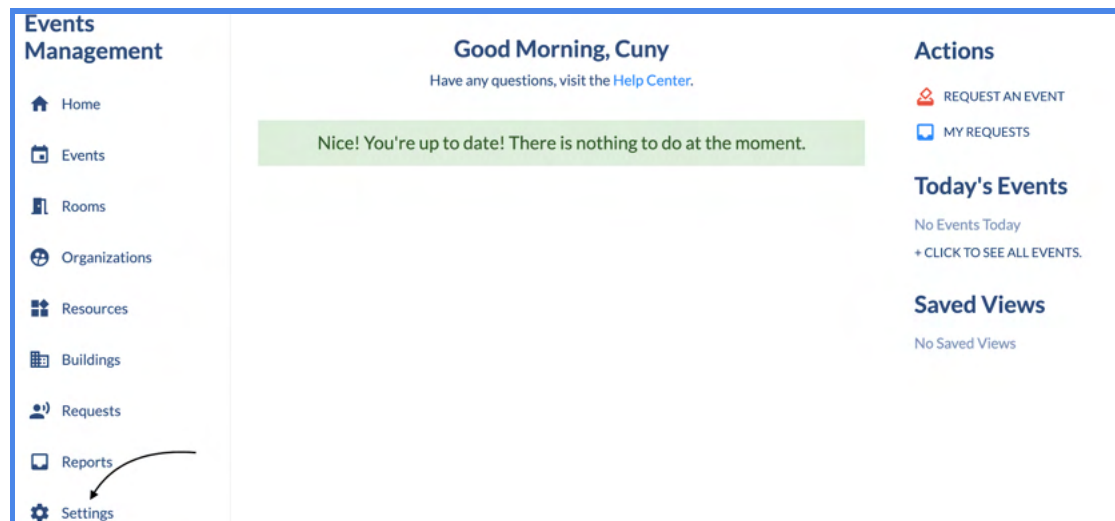
Note: You must navigate to the **Events platform** to configure Global Blackout Dates.

Blackout Dates for rooms in events are distinct from **Blocked Out Times** for rooms in scheduling. **Blocked Out Times** for rooms in scheduling only impact room assignments in scheduling and are unrelated to room assignments in events. You can read more about blocked out times in scheduling [here](#).

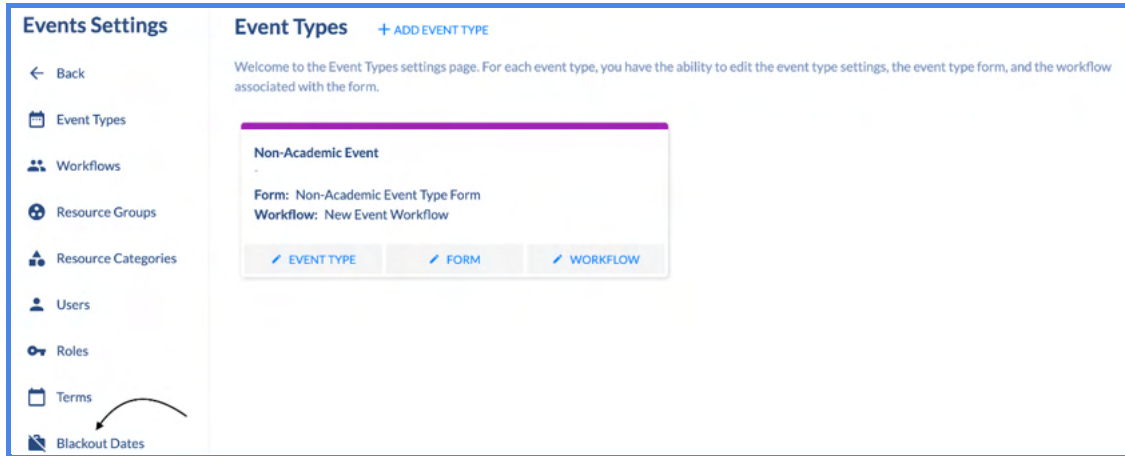
1. To add institution wide blackout dates in the **Events** platform, go to the top right corner and select the grid icon and click on **Events**.



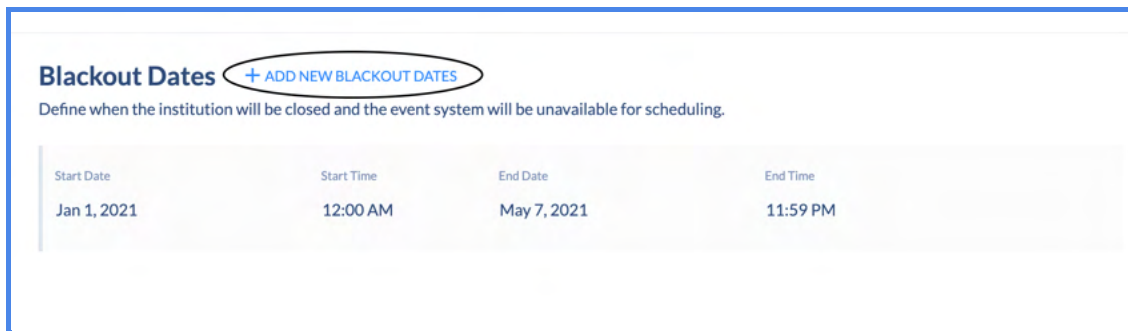
2. Once you land on the **Events** platform, navigate to 'Settings'



3. Select '**Blackout Dates**'



4. Select **'+ Add New Blackout Dates'** and add **'Start Date,' 'Start Time,' 'End Date,'** and **'End Time'**



Once the schedule has been finalized for a given term the institution wide blackout dates for that term should be removed in the **Events** platform so that events may be booked in rooms around class meetings.

Recurrence Patterns for Blackout Dates

By default, blackout dates in events will blackout **all dates** within a certain date range. Using recurring dates will make it such that only **certain dates**, based on days of the week, are blacked out within the specified date range. For example, in the below screenshot, any Su/M/W/F/S between Oct 2 and Oct 31 would *not* be considered a blackout date, and users would not be notified of a blackout conflict when requesting an event, whereas any T/Th between Oct 2 and Oct 31 would be considered a blackout date. Any Tu/Th outside of this date range would *not* be considered a blackout date.

Blackout Dates [+ ADD NEW BLACKOUT DATES](#)

Define when the institution will be closed and the event system will be unavailable for scheduling.

Start Date	Start Time	End Date	End Time
Oct 2, 2020	07:00 AM	Oct 31, 2020	09:00 PM

Use Recurring Dates [?](#)

Days

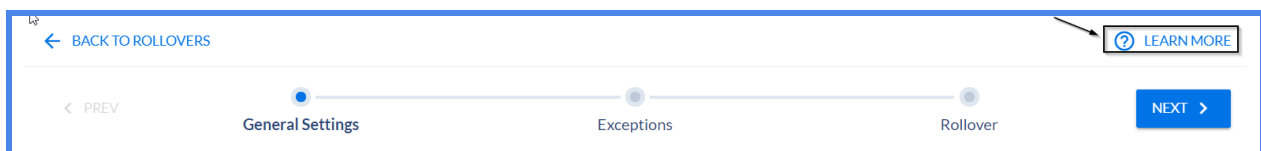
S M T W Th F S

Rollovers

Rollovers are a way to copy a Class Schedule from a previous term to an upcoming term. To save time building the class schedule from scratch every term, the user has the option to rollover an entire class schedule. Users also have the option to use filters to include or exclude specific fields within the section editor and its values from rolling over to the upcoming term (e.g. Specific Courses, Assigned Instructors, Rooms, Days/Times etc...). If any of the fields are excluded from the Rollover, the value returned to the schedule of classes will be empty. Please take note, there are two types of Rollovers in Coursedog, **SECTIONS Rollover** and **RELATIONSHIPS Rollover**. **SECTIONS Rollover** will copy the courses and its class sections scheduled from a previous term to the next. **RELATIONSHIPS Rollover** will copy over Relationships (i.e. Combined Sections) from the previous term to the next. When executing a Rollover, there are three stages to this process;

1. **General Settings** - On this page, the user is able to select which Term they would like to Rollover and select fields to be Included/Excluded from the Rollover.
2. **Exceptions** - This page allows the user to exclude specific Sections of a Course and/or exclude Courses (including its Class Sections) from the Rollover. If performing a Rollover for Relationships, this page is where users are able to exclude/include specific Relationships from the Rollover.
3. **Rollover** - This page will list the breakdown of how many class sections/courses will be rolled over, including the list of Section Fields that will not rollover by default and including the ones that were selected from the user. If doing a Rollover for Relationships, this show the breakdown of how many Relationships will be rolled over

To learn more about Rollovers, click on the “**LEARN MORE**” icon underneath the Rollovers page for further explanation on the functionality and to view FAQs.



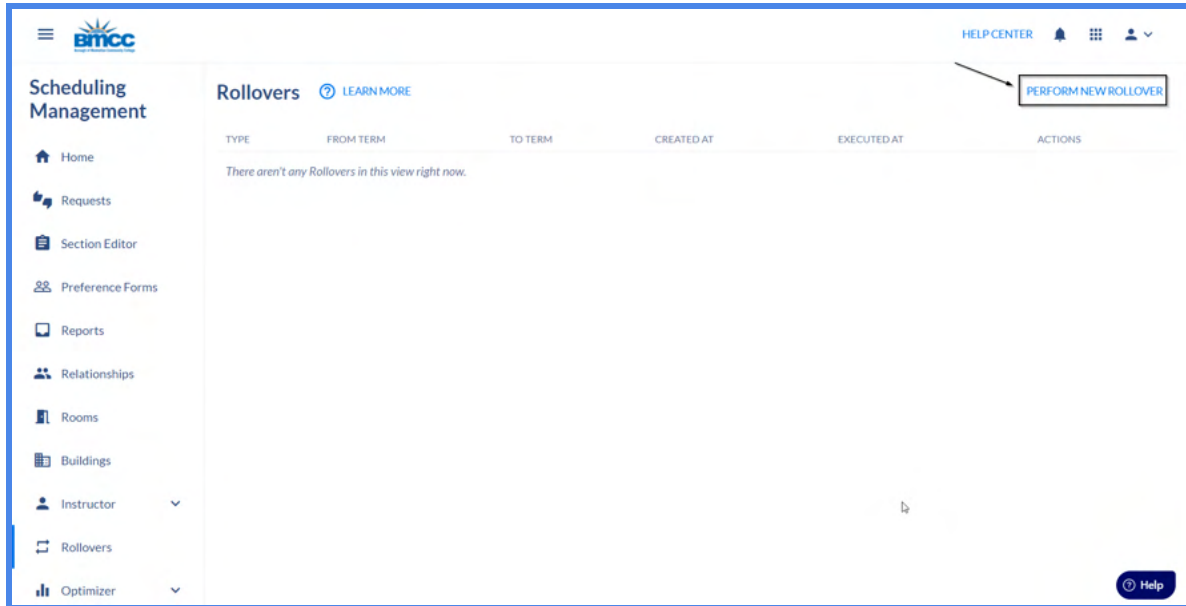
Note: This is the same functionality for rolling over the previous schedule of classes to the next from the ‘Copy Prior Term to Term’ page in CUNYfirst. When performing a Rollover, it is recommended to go over which courses and number of class sections that will be included/excluded from the upcoming term to avoid and save time from Cancelling multiple Class Sections in the Section Editor. Please avoid running this more than once (if rolling over the entire schedule), as this will generate the Class Numbers for each of these class sections when nightly sync is turned on to push into CUNYfirst the next day.

Only Central Super Admin and Scheduling Campus Admin are permitted to perform Rollovers in the Scheduling Management Tool. Scheduling Department Schedulers and/or Scheduling

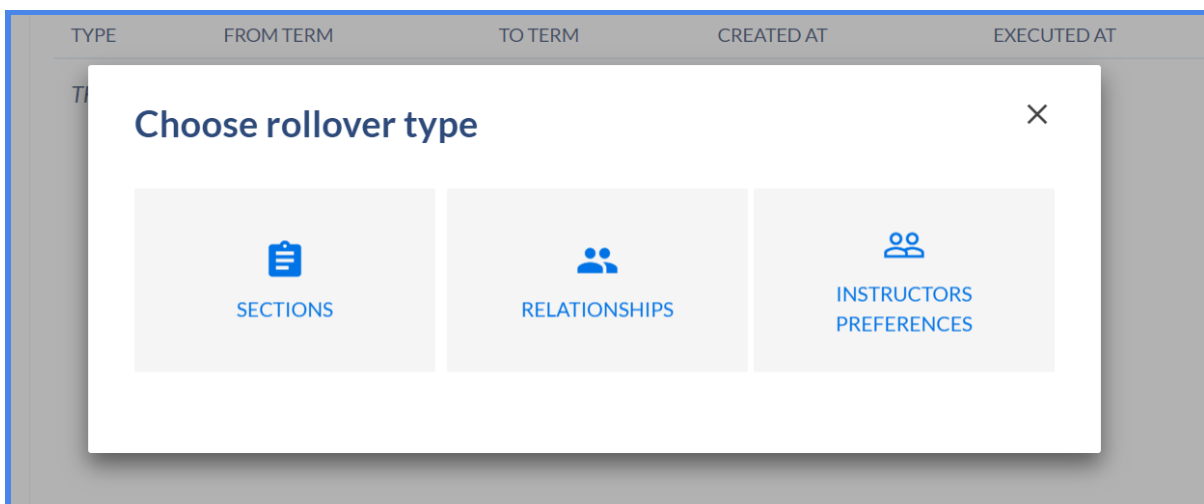
Faculty Workload Coordinators should coordinate with their Scheduling Campus Admin to schedule Rollovers for the upcoming term.

How to Perform a Rollover

1. On the home page, go to the left-hand side menu and select **“Rollovers”** to take you to the Rollovers Dashboard page. On the top-right corner of the screen, select the **“PERFORM NEW ROLLOVER”** button.



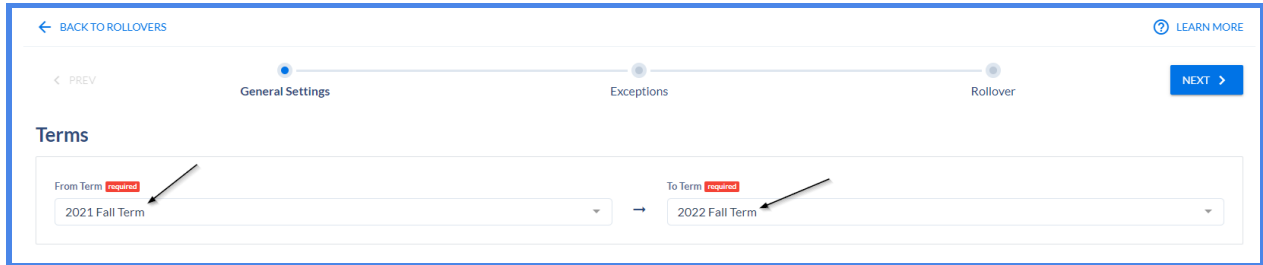
2. Next, a new window will pop-up for you to select the Type of Rollover you want to perform.



Note: INSTRUCTORS PREFERENCES is not available yet as this is not in use during this phase of Go-Live.

Sections Rollover

1. From the Sections Rollover page, under “Terms”, select the *From Term* field to choose which Term you are copying class sections/courses from. Select *To Term* to assign the term in which *you* would like this to Rollover to happen.



2. Underneath “Sections Fields” you will find all the fields that are pulled from the Section Editor. The user can unselect certain fields to be excluded from the Rollover when it is executed.

Section Fields

Viewing 16-30 of 122 < PREVIOUS NEXT >

ROLLOVER	FIELD NAME	DATA KEY	HIDDEN
<input checked="" type="checkbox"/>	Cancel if Student Enrolled	cnclIfStudEnrId	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Career	career	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Class Association Grading Basis	gradeMode	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Class Association Requisites	requirementGroup	<input type="checkbox"/>
<input type="checkbox"/>	Class End Date	endDate	<input type="checkbox"/>
<input type="checkbox"/>	Class Number	callNumber	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Class Section	sectionNumber	<input type="checkbox"/>
<input type="checkbox"/>	Class Start Date	startDate	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Class Status	status	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Class Type	registrationMode	<input type="checkbox"/>

[Help](#)

Note: If a field is selected to be excluded, we will roll it over with an empty value (e.g. If Instructors is Unchecked, the class sections will not have Instructors attached to it for the Term).

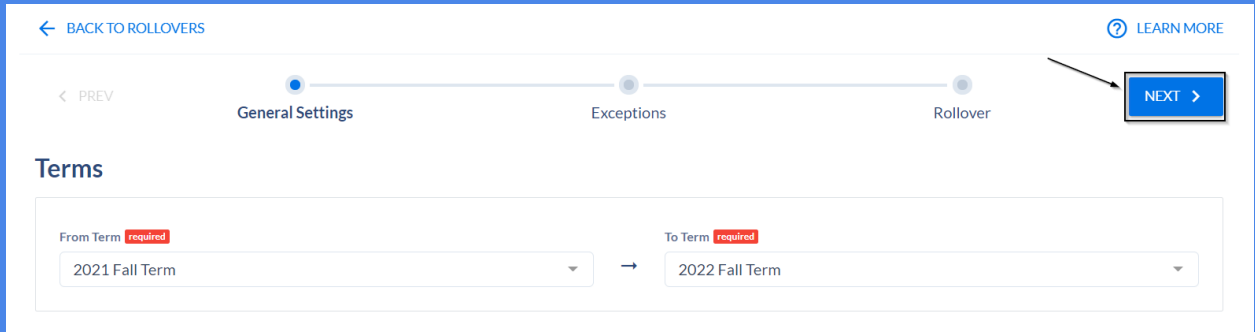
Please note, when including/excluding certain fields within the Section Editor, there are some fields that are dependent on another field. This is known as the parent-child relationship. If the parent field is unchecked, when a rollover is executed, all child fields associated with it will automatically be excluded and values returned in the Section Editor will be empty. For example, if the "Instructors" field is unchecked (parent field), all associated fields for an instructor such as Employee Record, Assign Type and Workload (child fields) will return as an empty value once rollover is complete.

The following fields are excluded from the Rollover and will be with placed with Empty Values and should be setup manually after the rollover is executed;

- **Class Start Date** (startDate)
- **Class End Date** (endDate)
- **Enrollment Total** (enrollment)
- **Waitlist Total** (waitlist)
- **Linked Sections** (linkedSections)
- **Cross Enrolled Sections** (crossEnrolledSections)
- **Meeting Start Date** (timesStartDate)
- **Meeting End Date** (timesEndDate)
- **Class Number** (callNumber)
- **Name** (relationshipName)
- **Type** (relationshipType)
- **Combined Max Enrollment** (relationshipCombinedMaxEnrollment)
- **Relationship** (relationshipRelationship)
- **Notes** (relationshipNotes)
- **Courses** (relationshipCourseIds)
- **Sections** (relationshipSectionIds)
- **Combination Type** (relationshipCombinationType)
- **Preferred Room Capacity** (relationshipPreferredRoomCapacity)
- **Combined Max Waitlist** (relationshipWaitlistCapacity)

In addition, you must manually uncheck the "**Event ID**" field as this is generated from CUNYfirst.

- Once you have selected which fields should be rolled over, select the “NEXT” button.



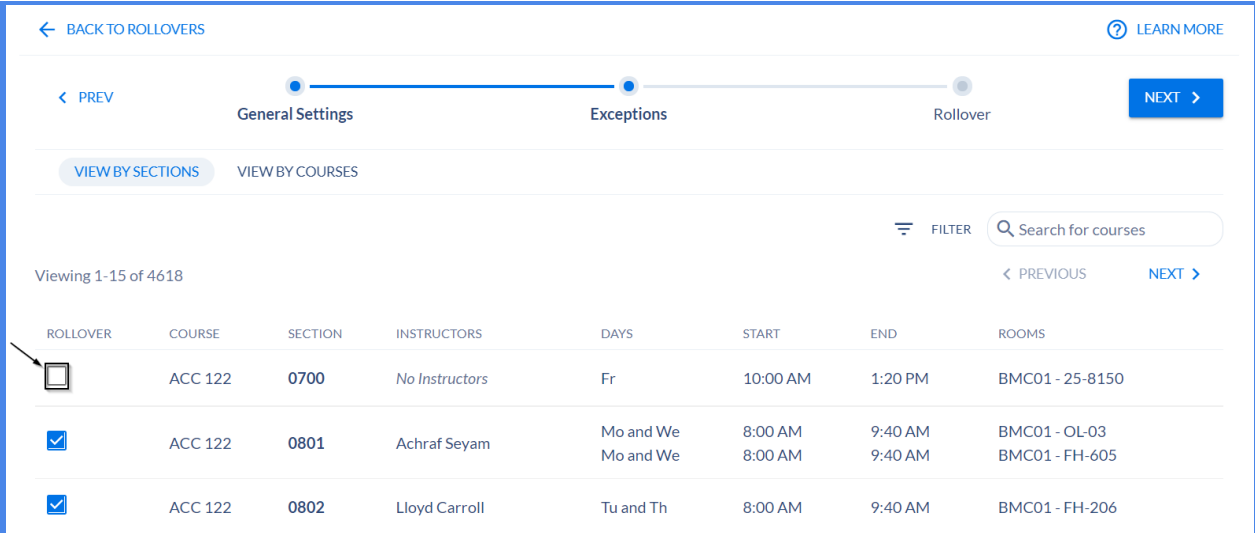
← BACK TO ROLLOVERS LEARN MORE

← PREV General Settings Exceptions Rollover NEXT >

Terms

From Term required 2021 Fall Term → To Term required 2022 Fall Term

- Under the Exceptions page, the user is able to exclude specific courses (**VIEW BY COURSES**), with its class sections attached, and/or exclude specific class sections (**VIEW BY SECTIONS**) of a course from the Rollover. You may utilize the **FILTER**, next to the Search engine, to assist you in finding specific courses or class sections you would like to exclude (if applicable).



← BACK TO ROLLOVERS LEARN MORE

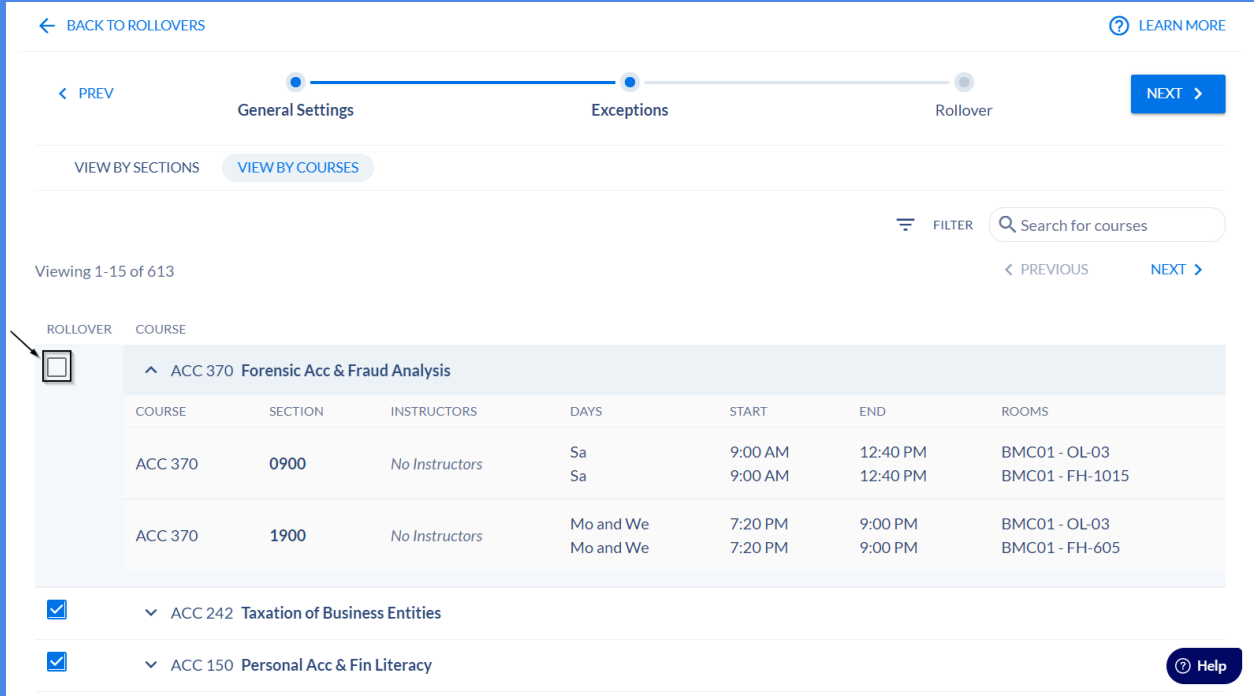
← PREV General Settings Exceptions Rollover NEXT >

VIEW BY SECTIONS VIEW BY COURSES

FILTER

Viewing 1-15 of 4618 < PREVIOUS NEXT >

ROLLOVER	COURSE	SECTION	INSTRUCTORS	DAYS	START	END	ROOMS
<input type="checkbox"/>	ACC 122	0700	No Instructors	Fr	10:00 AM	1:20 PM	BMC01 - 25-8150
<input checked="" type="checkbox"/>	ACC 122	0801	Achraf Seyam	Mo and We Mo and We	8:00 AM 8:00 AM	9:40 AM 9:40 AM	BMC01 - OL-03 BMC01 - FH-605
<input checked="" type="checkbox"/>	ACC 122	0802	Lloyd Carroll	Tu and Th	8:00 AM	9:40 AM	BMC01 - FH-206



← BACK TO ROLLOVERS ? LEARN MORE

General Settings Exceptions Rollover NEXT >

VIEW BY SECTIONS VIEW BY COURSES

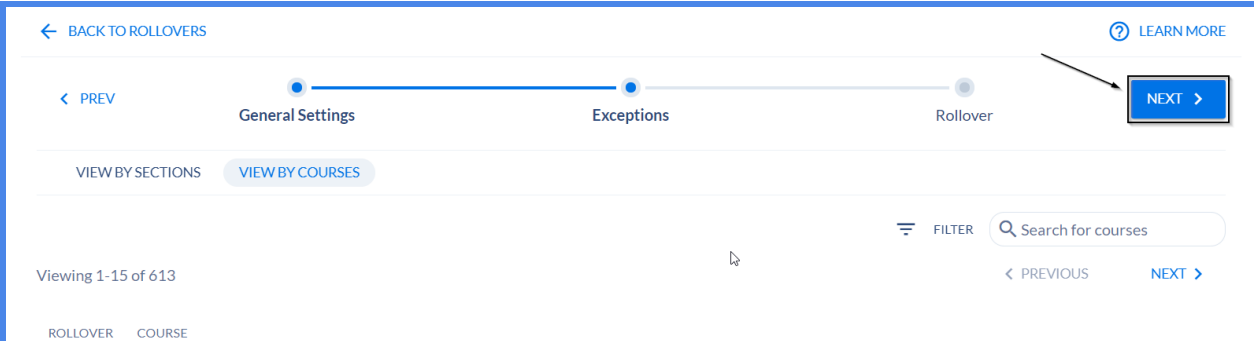
Viewing 1-15 of 613 FILTER

ROLLOVER	COURSE							
<input checked="" type="checkbox"/>	ACC 370 Forensic Acc & Fraud Analysis							
		COURSE	SECTION	INSTRUCTORS	DAYS	START	END	ROOMS
	ACC 370	0900	No Instructors	Sa	9:00 AM	12:40 PM	BMC01 - OL-03	
					Sa	9:00 AM	12:40 PM	BMC01 - FH-1015
	ACC 370	1900	No Instructors	Mo and We	7:20 PM	9:00 PM	BMC01 - OL-03	
				Mo and We	7:20 PM	9:00 PM	BMC01 - FH-605	

ACC 242 Taxation of Business Entities

ACC 150 Personal Acc & Fin Literacy Help

- Once you have specified which class sections/courses you would like to exclude/include, select the **“NEXT”** button.



← BACK TO ROLLOVERS ? LEARN MORE

General Settings Exceptions Rollover NEXT >

VIEW BY SECTIONS VIEW BY COURSES

Viewing 1-15 of 613 FILTER


ROLLOVER COURSE

- On this page, prior to executing the Rollover, it will break down the number of class sections and its courses that will rollover from the Previous Term to the Next Term (based on the users selection). Also it will list down which Sections Fields that that system will not Rollover by default and another list that will show which Section Fields were selected by the user that will not rollover.

Once the user has reviewed, select the **“ROLLOVER”** button and a window will pop-up for the user to select **“EXECUTE ROLLOVER.”**

Build The Perfect Schedule

Click rollover to take the first step in creating your perfect schedule.



There are **4618** Sections and **613** Courses matching search and filter criteria.
We will rollover only these, excluding any selected exceptions.


We will rollover from **2021 Fall Term** to **2022 Fall Term**.

We will not rollover these Section Fields by default:

- **Class Start Date** (startDate)
- **Class End Date** (endDate)
- **Enrollment Total** (enrollment)
- **Waitlist Total** (waitlist)
- **Linked Sections** (linkedSections)
- **Cross Enrolled Sections** (crossEnrolledSections)
- **Meeting Start Date** (timesStartDate)
- **Meeting End Date** (timesEndDate)
- **Class Number** (callNumber)
- **Name** (relationshipName)
- **Type** (relationshipType)
- **Combined Max Enrollment** (relationshipCombinedMaxEnrollment)
- **Relationship** (relationshipRelationship)
- **Notes** (relationshipNotes)
- **Courses** (relationshipCourseIds)
- **Sections** (relationshipSectionIds)
- **Combination Type** (relationshipCombinationType)
- **Preferred Room Capacity** (relationshipPreferredRoomCapacity)
- **Combined Max Waitlist** (relationshipWaitlistCapacity)

We will not rollover these selected Section Fields:

- **Instructors** (professors)
- **Room** (timesRoom)



Build The Perfect Schedule

Click rollover to take the first step in creating your perfect schedule.

Are you sure you want to execute this Rollover?

×

CANCEL

EXECUTE ROLLOVER

7. Once the Rollover is executed, an icon will display as loading. Once complete, it will take the user back to the Rollovers Dashboard and a message will appear on the bottom of the page that it was successful. The user will be able to view the rolled over schedule of classes via Section Editor.

← BACK TO ROLLOVERS
LEARN MORE ?


← PREV

General Settings
•
Exceptions
•
Rollover



NEXT >

Build The Perfect Schedule

Click rollover to take the first step in creating your perfect schedule.







Rollovers [? LEARN MORE](#) PERFORM NEW ROLLOVER

TYPE	FROM TERM	TO TERM	CREATED AT	EXECUTED AT	ACTIONS
 Sections	2021 Fall Term	2022 Fall Term	Sep 1, 2021	Sep 1, 2021	

Rollover has been executed

[Help](#)




 HELP CENTER   

2022 Fall Term All Departments

Sections By Course SECTIONS INSTRUCTORS CALENDAR DEPARTMENTS

Viewing 1-25 of 612 FILTER CHANGE VIEW Search for sections

[< PREVIOUS](#) [NEXT >](#)

- ▼ ACC 122 - Accounting Principles I (Undergraduate) 
- ▼ ACC 150 - Personal Acc & Fin Literacy (Undergraduate) 
- ▼ ACC 222 - Accounting Principles II (Undergraduate) 

Note: The Schedule of Classes that were Rolled over will show in the Schedule of Classes in CUNYfirst after nightly sync in order to generate the Class Numbers. Please consult CUNY OUR to have nightly sync to be turned ON ahead of time, if you are planning to conduct a Rollover of the Class Schedule for the upcoming term.

Relationships Rollover

1. From the Relationships Rollover page, under “Terms” select the *From Term* field to choose which Term you are copying which class sections/courses from and select *To Term* which class sections/courses you would like this to Rollover to a specific Term.

Terms

From Term required → To Term required

- Below “Relationship Fields” you will find all the fields pulled from the Combined Sections Table. The user can unselect certain fields to be excluded from the Rollover when it is executed.

Relationship Fields

ROLLOVER	FIELD NAME	DATA KEY	HIDDEN
<input checked="" type="checkbox"/>	Name	relationshipName	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Type	relationshipType	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Combined Max Enrollment	relationshipCombinedMaxEnrollment	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Notes	relationshipNotes	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Relationship	relationshipRelationship	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Combination Type	relationshipCombinationType	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Preferred Room Capacity	relationshipPreferredRoomCapacity	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Combined Max Waitlist	relationshipWaitlistCapacity	<input type="checkbox"/>

[Help](#)

- Once you have selected which fields should be rolled over, select the “NEXT” button.

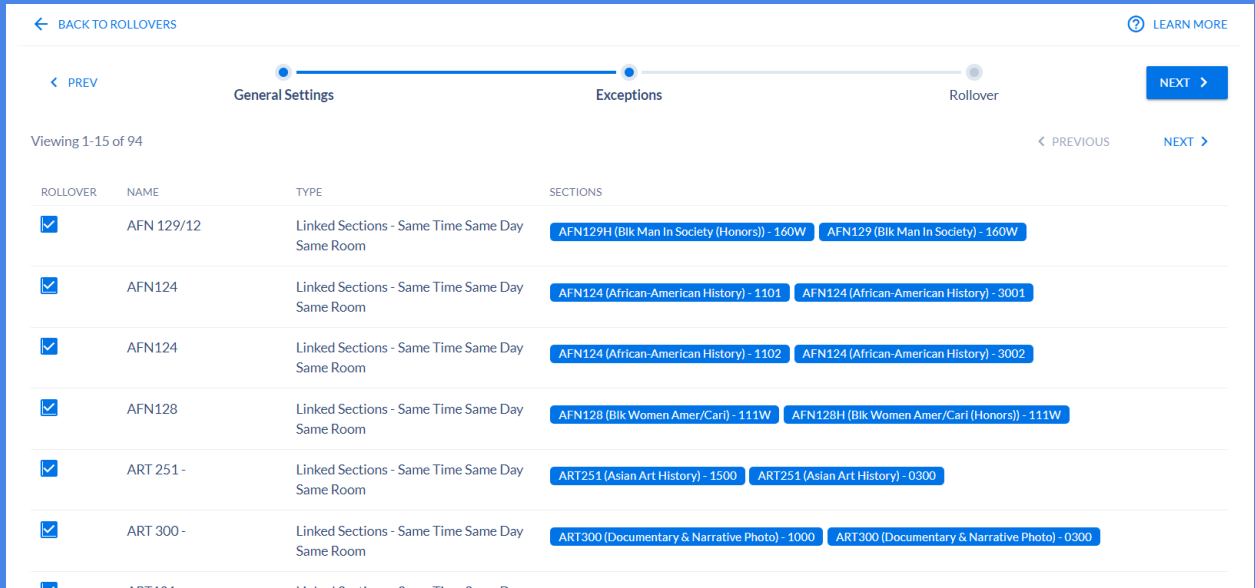
[← BACK TO ROLLOVERS](#) [LEARN MORE](#)

[← PREV](#)
● General Settings
● Exceptions
● Rollover
NEXT >

Terms

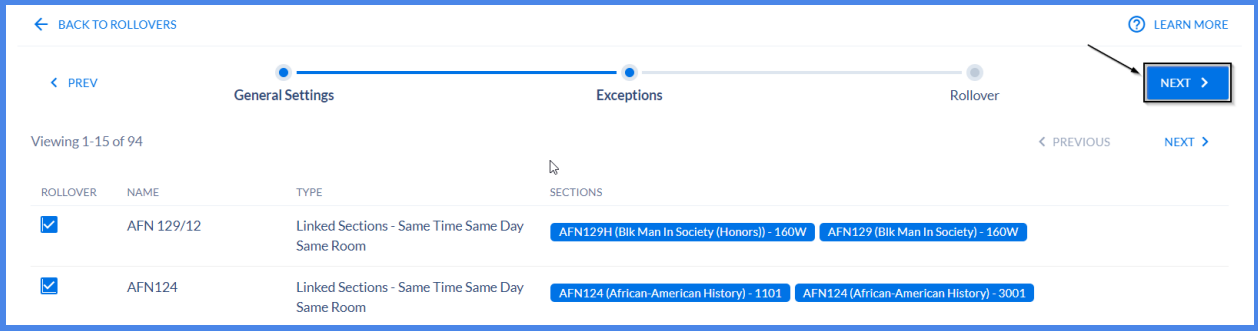
From Term required → To Term required

- Under the Exceptions page, the user may select which Relationships to include/exclude in the Rollover.



ROLLOVER	NAME	TYPE	SECTIONS
<input checked="" type="checkbox"/>	AFN 129/12	Linked Sections - Same Time Same Day Same Room	AFN129H (Blk Man In Society (Honors)) - 160W AFN129 (Blk Man In Society) - 160W
<input checked="" type="checkbox"/>	AFN124	Linked Sections - Same Time Same Day Same Room	AFN124 (African-American History) - 1101 AFN124 (African-American History) - 3001
<input checked="" type="checkbox"/>	AFN124	Linked Sections - Same Time Same Day Same Room	AFN124 (African-American History) - 1102 AFN124 (African-American History) - 3002
<input checked="" type="checkbox"/>	AFN128	Linked Sections - Same Time Same Day Same Room	AFN128 (Blk Women Amer/Carl) - 111W AFN128H (Blk Women Amer/Carl (Honors)) - 111W
<input checked="" type="checkbox"/>	ART 251 -	Linked Sections - Same Time Same Day Same Room	ART251 (Asian Art History) - 1500 ART251 (Asian Art History) - 0300
<input checked="" type="checkbox"/>	ART 300 -	Linked Sections - Same Time Same Day Same Room	ART300 (Documentary & Narrative Photo) - 1000 ART300 (Documentary & Narrative Photo) - 0300

- Once you have specified the Relationships you would like to exclude/include, select the **“NEXT”** button.



- On this page, prior to executing the Rollover, it will break down the number Relationships that will rollover from the Previous Term to the Next Term (based on the users selection).

Once the user has reviewed, select the **“ROLLOVER”** button and a window will pop-up for the user to select **“EXECUTE ROLLOVER.”**

← BACK TO ROLLOVERS ? LEARN MORE

General Settings Exceptions Rollover

Build The Perfect Schedule ROLLOVER

Click rollover to take the first step in creating your perfect schedule.

There are **94 Relationships**.
We will rollover only these, excluding any selected exceptions.

We will rollover from **2020 Spring Term** to **2022 Spring Term**.







Are you sure you want to execute this Rollover?

×

CANCEL EXECUTE ROLLOVER

- Once the Rollover is executed, an icon will display as loading. Once complete, it will take the user back to the Rollovers Dashboard and a message will appear on the bottom of the page that it was successful. The user will be able to view the rolled over Relationships on the Relationships dashboard page.

Rollovers ? LEARN MORE PERFORM NEW ROLLOVER

TYPE	FROM TERM	TO TERM	CREATED AT	EXECUTED AT	ACTIONS
 Relationships	2020 Spring Term	2022 Spring Term	Sep 1, 2021	Sep 1, 2021	
 Sections	2020 Spring Term	2022 Spring Term	Sep 1, 2021	<i>Not executed</i>	
 Sections	2021 Fall Term	2022 Fall Term	Aug 31, 2021	Sep 1, 2021	

Rollover has been executed Help

Relationships

Relationships are used to associate multiple sections with each other.

[+ ADD RELATIONSHIP](#)

Viewing Term: 2022 Spring Term

Viewing 1-50 of 87

< PREVIOUS NEXT >

NAME	TYPE	SECTIONS
AFN 129/12	Linked Sections - Same Time Same Day Same Room	AFN129H (Blk Man In Society (Honors)) - 160W AFN129 (Blk Man In Society) - 160W
AFN124	Linked Sections - Same Time Same Day Same Room	AFN124 (African-American History) - 1101 AFN124 (African-American History) - 3001
AFN124	Linked Sections - Same Time Same Day Same Room	AFN124 (African-American History) - 1102 AFN124 (African-American History) - 3002
AFN128	Linked Sections - Same Time Same Day Same Room	AFN128 (Blk Women Amer/Carl) - 111W AFN128H (Blk Women Amer/Carl (Honors)) - 111W

Note: The Schedule of Classes Rolled over (including the Relationships rollover) will show in the Schedule of Classes in CUNYfirst after nightly sync, in order to generate the Class Numbers. If you are planning to conduct a Rollover of the Class Schedule for the upcoming term, please consult CUNY OUR to have nightly sync turned ON ahead of time for the upcoming term.

Creating/Adding Relationships (Linked Sections)

In Coursedog, you can share a Relationship between two or more separate class sections from a course within the same Academic Organization or from another Academic Organization as one class offering. When these class sections are linked together, they will share the Same Time, Same Day, Same Room and Same Instructor information.

For example, a course from the Criminal Justice Department (ECO 360) is identical to a course that is offered from the Economics Department (SOC 360). Both courses teach the same subject (White Collar Crime) and are offered every semester, however only a maximum of 40 students is allowed in total. To offer both courses in the Schedule each semester but must be taught as a single class where there is only one instructor, one meeting pattern, and one room, these must share a Relationship (i.e. Linked Sections).

Each class section that belongs to a Relationship will always have different Class Numbers but will always have the same Event ID Numbers generated from CUNYfirst.

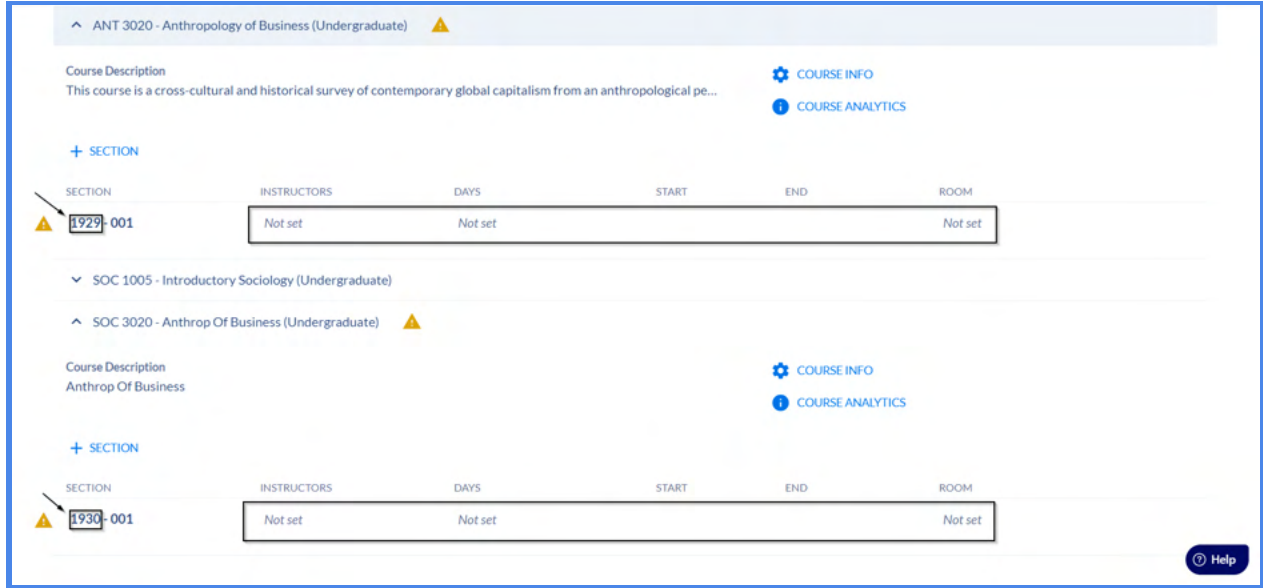
Note: *This is the same as Combined Sections in PeopleSoft.*

Creating a Relationship via Relationship Dashboard

Relationships between courses/sections in Coursedog can be added and managed through the Relationships Dashboard.

1. Create new class sections or use pre-existing class sections that **do not have any** Meeting Pattern (Days and Times), Room(s) and Instructor(s) attached that will belong to the Relationship.

If Real-Time Integration is On: CUNYfirst will then generate a CLASS NBR for the section which will populate in Coursedog. When real-time integration is enabled you *must* first ensure that CLASS NBRs have been created for the sections to be used in the Relationship.



ANT 3020 - Anthropology of Business (Undergraduate) ⚠

Course Description
This course is a cross-cultural and historical survey of contemporary global capitalism from an anthropological pe...

COURSE INFO
COURSE ANALYTICS

+ SECTION

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
⚠ 1929-001	Not set	Not set			Not set

SOC 3020 - Anthropol Of Business (Undergraduate) ⚠

Course Description
Anthropol Of Business

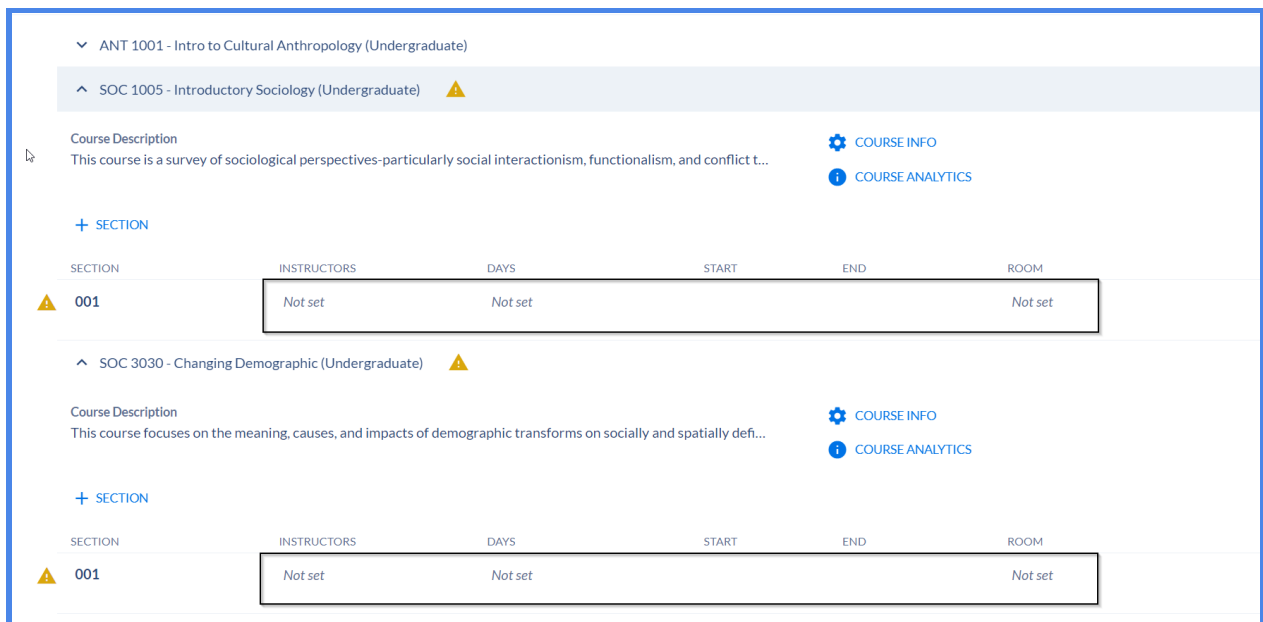
COURSE INFO
COURSE ANALYTICS

+ SECTION

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
⚠ 1930-001	Not set	Not set			Not set

Help

If Real-Time Integration is Off: When real-time integration is not enabled you do *not* first have to confirm CLASS NBRs have been created. Just validate that the class sections have been created and saved in Coursedog.



SOC 1005 - Introductory Sociology (Undergraduate) ⚠

Course Description
This course is a survey of sociological perspectives-particularly social interactionism, functionalism, and conflict t...

COURSE INFO
COURSE ANALYTICS

+ SECTION

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
⚠ 001	Not set	Not set			Not set

SOC 3030 - Changing Demographic (Undergraduate) ⚠

Course Description
This course focuses on the meaning, causes, and impacts of demographic transforms on socially and spatially def...

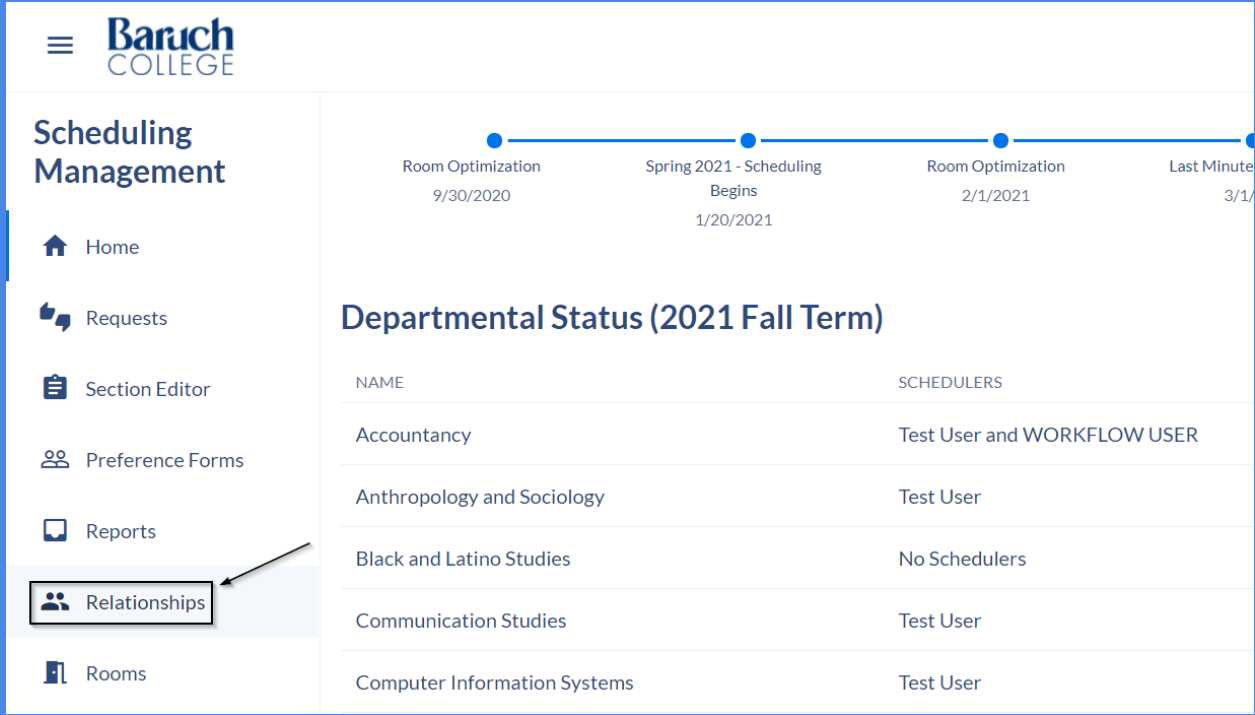
COURSE INFO
COURSE ANALYTICS

+ SECTION

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
⚠ 001	Not set	Not set			Not set

Note: All class sections that will share a Relationship must have the same Enrollment Capacity at the class section level (i.e. **Enrollment Settings** card).

- Navigate to the relationships tab on the left hand side menu to access the dashboard.



Baruch COLLEGE

Scheduling Management

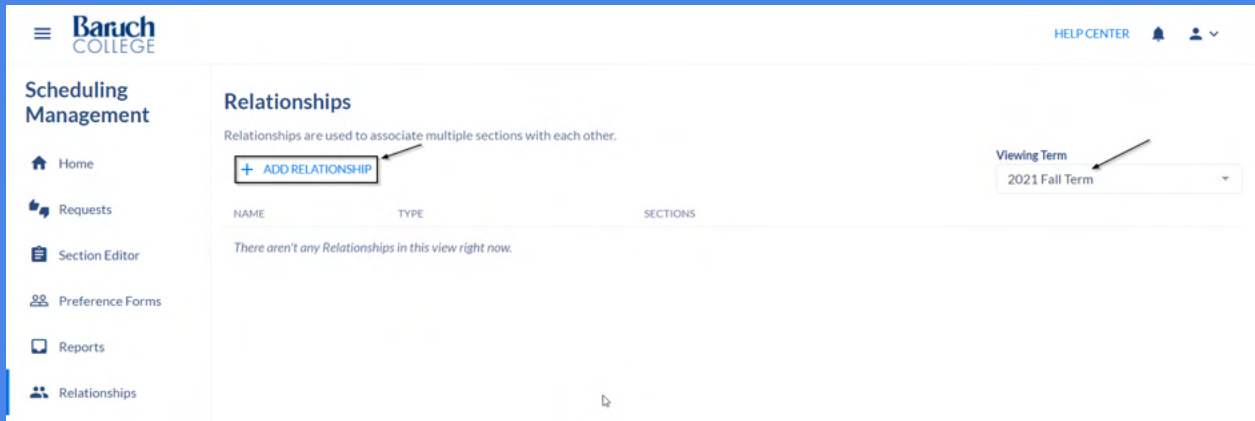
- Home
- Requests
- Section Editor
- Preference Forms
- Reports
- Relationships**
- Rooms

Room Optimization 9/30/2020 Spring 2021 - Scheduling Begins 1/20/2021 Room Optimization 2/1/2021 Last Minute 3/1/2021

Departmental Status (2021 Fall Term)

NAME	SCHEDULERS
Accountancy	Test User and WORKFLOW USER
Anthropology and Sociology	Test User
Black and Latino Studies	No Schedulers
Communication Studies	Test User
Computer Information Systems	Test User

- From there, relationships can be created using the “+ Add Relationships” button. If you are creating a relationship for class sections that are for another term, you may select the drop down field in the Viewing Term field to select another term.



Baruch COLLEGE HELP CENTER [Notification Icon] [User Icon]

Scheduling Management

- Home
- Requests
- Section Editor
- Preference Forms
- Reports
- Relationships**

Relationships

Relationships are used to associate multiple sections with each other.

+ ADD RELATIONSHIP

Viewing Term: 2021 Fall Term

NAME	TYPE	SECTIONS
There aren't any Relationships in this view right now.		

- A window will pop up, complete all relevant fields to create the Relationship (see below for each field and its definition). Afterwards, click the “Save” button and it will create the relationship between the class sections you have linked.

Add Relationship ✕

Relationship Information

i This relationship has not yet been synced with the SIS.

Name

Type

Combined Max Enrollment ?

Relationship ?

i This relationship causes all double booked instructor and room conflicts between the sections to be ignored.

Notes

Combination Type

Preferred Room Capacity

Combined Max Waitlist

Relationship Courses

Course to add

Sections to add
 +

ANT 3020 (Anthropology of Business) - 001 ✖ i

SOC 3020 (Anthrop Of Business) - 001 ✖ i

CLOSE
SAVE

Field Names:

- **“Name”**: Name of the Relationship
- **“Combined Max enrollment”**: The overall max enrollment for all the class sections you will link (i.e. If SOC 100 and ANT 100 are linked and they have a Combined Max enrollment of 30, the max number of students that can be enrolled to these linked sections is 30).
 - If the Combined Max Enrollment sum is not set, the value will be defined as the sum of the max enrollments of all sections in the relationship.
- **“Combination Type”**: Select ‘Within Subject’, ‘Cross Subject’, or ‘Both’
- **“Combined Max Waitlist”**: The max number of students to be placed on the waitlist for the linked sections once the class is fully enrolled.
- **“Preferred Room Capacity”**: The desired facility with the specific room capacity you want the linked sections to be assigned to.
- **“Notes”**: For Linked Sections only
- **“Courses to add”**: Type in the Course(s) (Subject + Code) you want to link and select it

- **“Sections to add”**: Once a Course has been selected, click on the dropdown and select the Class Section number(s) you would like to link
 - When adding sections to the relationship be sure to select the '+' button. Otherwise, the relationship will not be built.

Relationship Options:

<p>Same Time, Same Day, And Same Room</p>	<p>This is also known as a Shared Space or taught together relationship. These sections are supposed to be taught at the same time and day, and in the same room.</p> <p>With this relationship all Double Booked Instructor and Double Booked Room conflicts will be ignored.</p>
<p>No Relationship</p>	<p>If a user wants to combine two sections that have different meeting patterns, they must set the "Relationship Type" to "No Relationship," which is the same as setting the "Skip Meeting Pattern Edit Flag" to "Y" in Peoplesoft.</p> <p>If this is not done, the relationship will not be able to be created in Peoplesoft.</p>

Note: See [Section Editor Field Mappings](#) for a mapping of Coursedog Relationship fields to the CUNYfirst Combined Sections table to aid in completion.

If Real-Time Integration is On: The Integration Status will show the user that if the Relationship was synced with CUNYfirst.

Edit Relationship ✕

Relationship Information

✔ This relationship was **successfully** synced with the SIS on 5/14/2021 at 1:51 AM.

Name

Type

Combined Max Enrollment ?

Relationship Courses

Course to add

ANT 3020 (Anthropology of Business) - 001 ✖ ⓘ

SOC 3020 (Anthrop Of Business) - 001 ✖ ⓘ

If Real-Time Integration is Off: The Integration Status will let the user know that the Relationship has not synced with CUNYfirst. However, confirm that the Relationship was saved.

Edit Relationship ✕

Relationship Information

ⓘ This relationship has not yet been synced with the SIS.

Name

Type

Combined Max Enrollment ?

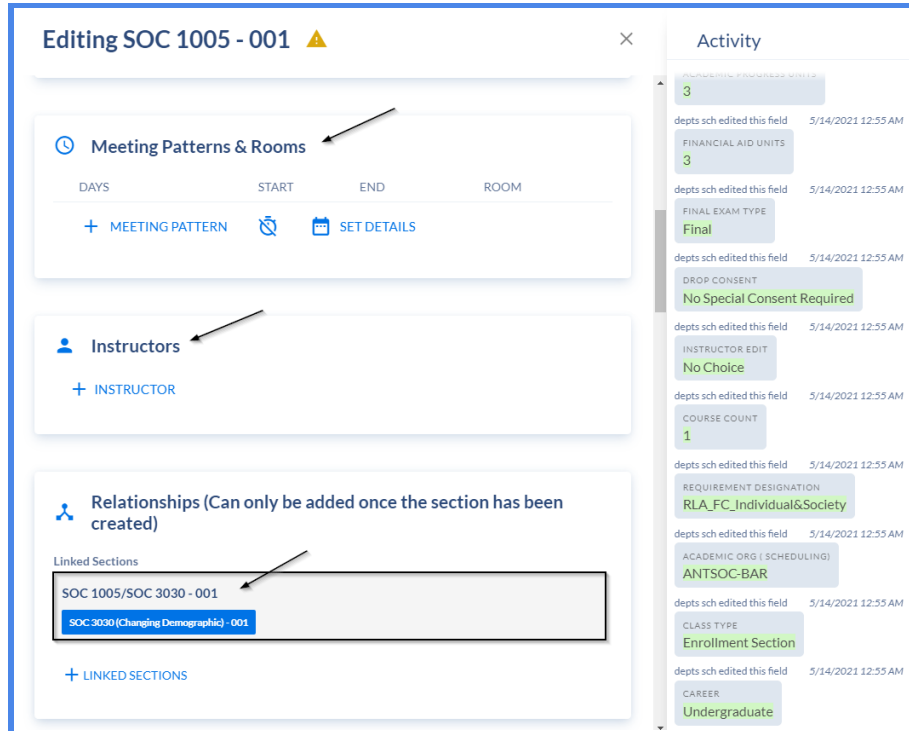
Relationship Courses

Course to add

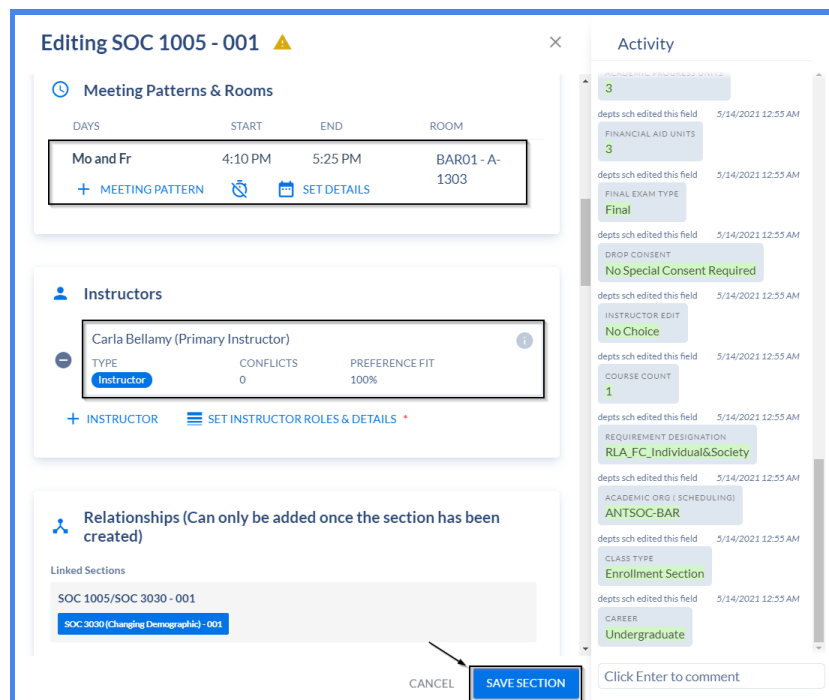
SOC 1005 (Introductory Sociology) - 001 ✖ ⓘ

SOC 3030 (Changing Demographic) - 001 ✖ ⓘ

5. After creating the Relationship through the Relationships Dashboard, navigate to **Section Editor** and open one of the class sections that was created or pre-existing that has the Relationship attached. From there, you are able to view the Relationship attached to the class section(s).



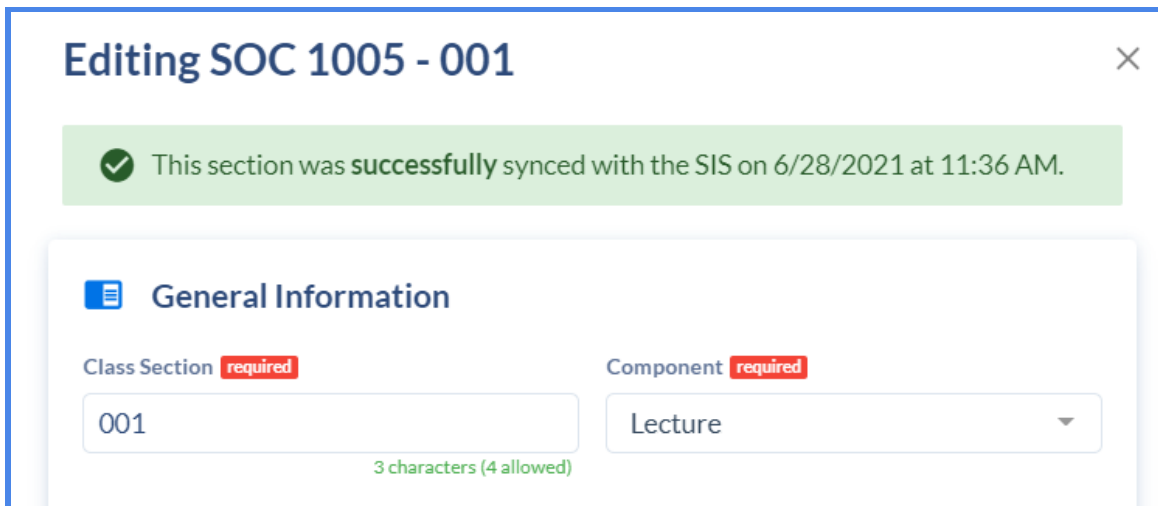
- From here, the user may go to the **“Meeting Patterns & Rooms”** card to add in Days/Times and Room and go to the **“Instructors”** card to add the Instructor(s) who will be teaching both of the linked sections. Afterwards click on the **“SAVE SECTION”** button.



7. A window will pop up and tell the users that there is a Relationship Conflict. This is the normal behavior as you are linking this section to another section that does not have the same Times/Days and/or Room attached. Click the “**SAVE SECTION**” button to continue.



If Real-Time Integration is On: The class section will sync successfully with CUNYfirst and it will have the Days/Times (including Room) and Instructor carry over to its linked section and the rule violation will disappear. This also includes the Event ID number generated via CUNYfirst.



67707 - 001	Carla Bellamy	Mo and We	10:00 AM	1:00 PM	BAR01 - A-1000H
-------------	---------------	-----------	----------	---------	-----------------


^ SOC 3020 - Anthrop Of Business (Undergraduate)

Course Description
Anthrop Of Business

[+ SECTION](#)


SECTION	INSTRUCTORS	DAYS	START	END	ROOM
67705 - 001	Carla Bellamy	Mo and We	10:00 AM	1:00 PM	BAR01 - A-1000H


If Real-Time Integration is Off: Confirm that the class section was saved and it has the Days/Time and Instructor added. If nightly sync is turned On for the Term,, the Days/Times (including Rooms) and Instructor will carry over to its linked section, the rule violation will disappear and this will generate the Class Number and the Event ID Number via CUNYfirst.

^ SOC 1005 - Introductory Sociology (Undergraduate) 					
---	--	--	--	--	--

Course Description
This course is a survey of sociological perspectives-particularly social interactionism, functionalism, and conflict t...


[+ SECTION](#)

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
 001	Carla Bellamy	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1303

^ SOC 3030 - Changing Demographic (Undergraduate) 					
---	--	--	--	--	--

Course Description
This course focuses on the meaning, causes, and impacts of demographic transforms on socially and spatially defi...

[+ SECTION](#)

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
 001	Not set	Not set			Not set

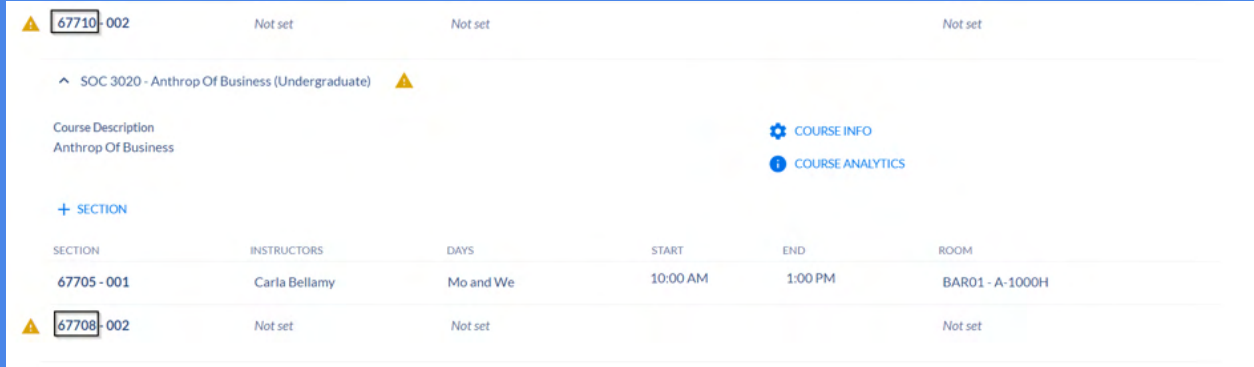
[Help](#)

Creating a Relationship via Section Editor

Relationships can be created between two or more class sections through the Section Editor.

1. Create new class sections or use pre-existing class sections that **do not have any** Meeting Pattern (Days and Times), Room(s) and Instructor(s) attached that will belong to the Relationship.

If Real-Time Integration is On: CUNYfirst will then generate a CLASS NBR for the section which will populate in Coursedog. When real-time integration is enabled you *must* first ensure that CLASS NBRs have been created for the sections to be used in the Relationship.



^ SOC 3020 - Anthrop Of Business (Undergraduate) ⚠

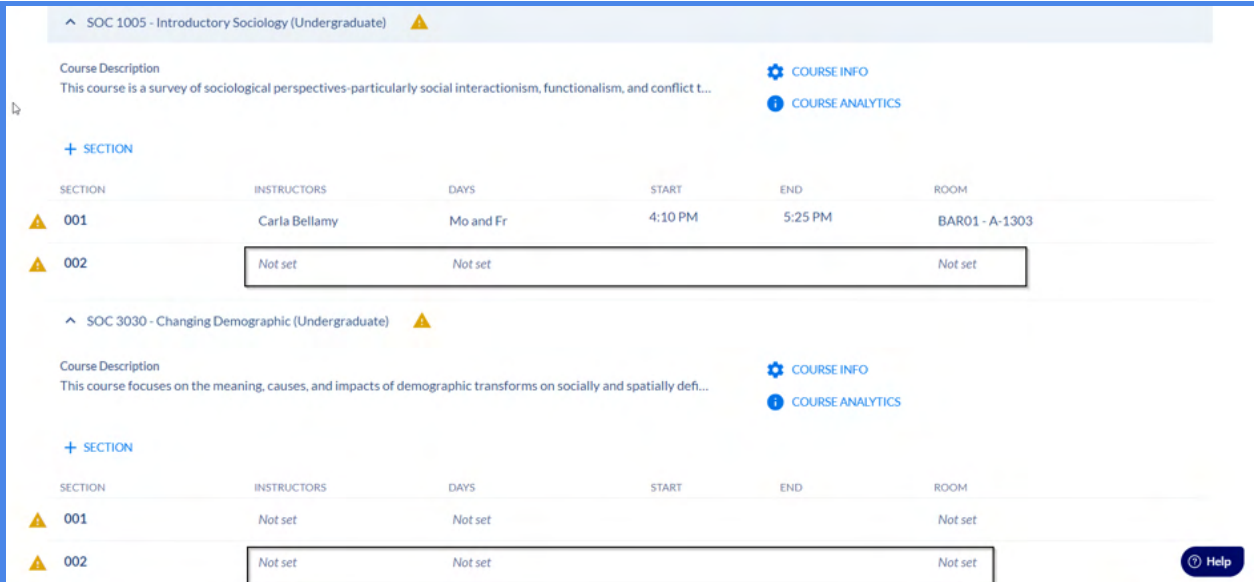
Course Description
Anthrop Of Business

[+ SECTION](#)

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
67705 - 001	Carla Bellamy	Mo and We	10:00 AM	1:00 PM	BAR01 - A-1000H
67710 - 002	Not set	Not set			Not set

[COURSE INFO](#)
[COURSE ANALYTICS](#)

If Real-Time Integration is Off: When real-time integration is not enabled you do *not* first have to confirm CLASS NBRs have been created. Just validate that the class sections have been created and saved in Coursedog.



^ SOC 1005 - Introductory Sociology (Undergraduate) ⚠

Course Description
This course is a survey of sociological perspectives-particularly social interactionism, functionalism, and conflict L...

[+ SECTION](#)

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
001	Carla Bellamy	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1303
002	Not set	Not set			Not set

^ SOC 3030 - Changing Demographic (Undergraduate) ⚠

Course Description
This course focuses on the meaning, causes, and impacts of demographic transforms on socially and spatially def...

[+ SECTION](#)

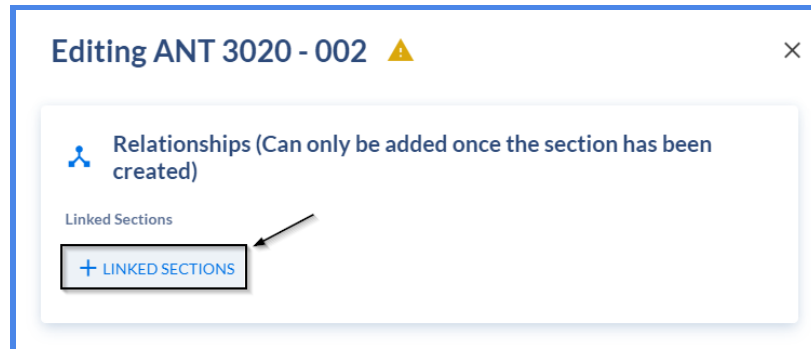
SECTION	INSTRUCTORS	DAYS	START	END	ROOM
001	Not set	Not set			Not set
002	Not set	Not set			Not set

[COURSE INFO](#)
[COURSE ANALYTICS](#)

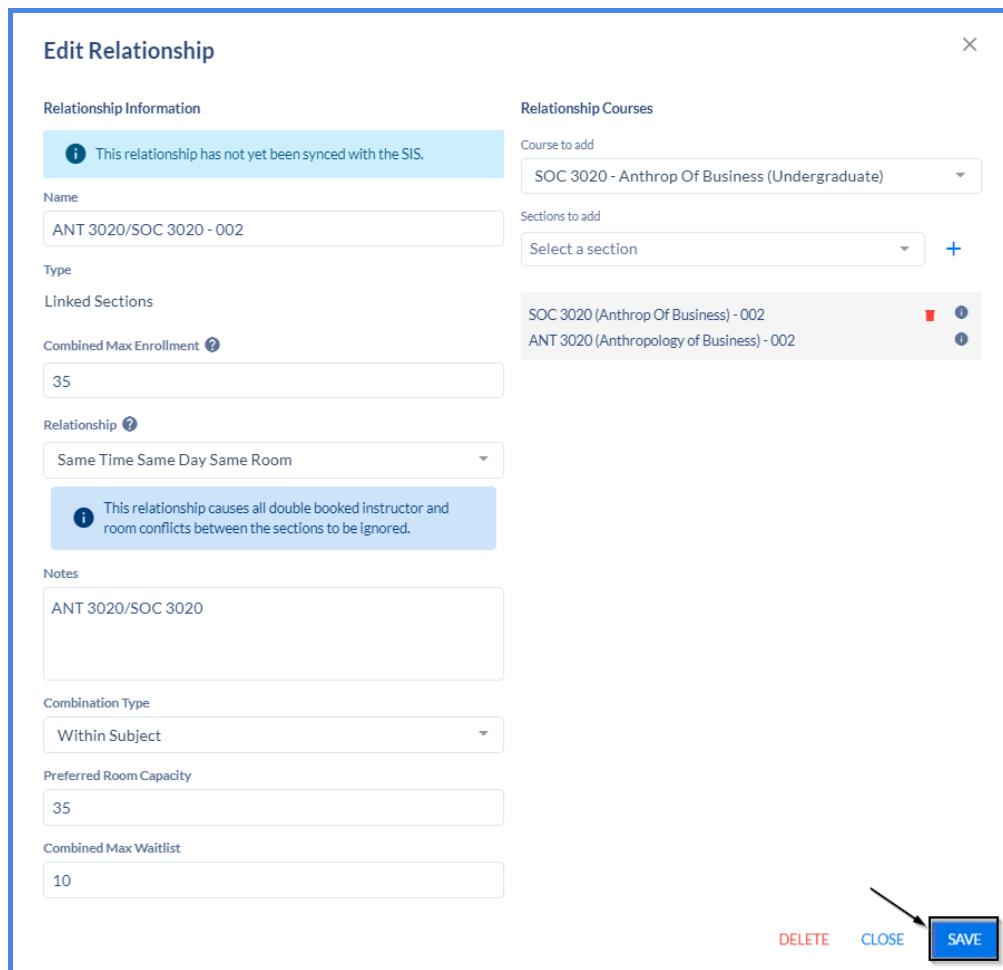
[Help](#)

Note: All class sections that will share a Relationship must have the same Enrollment Capacity at the class section level (i.e. **Enrollment Settings** card).

2. After you have created the class sections, open one of the class sections that was created or pre-existing class sections and go to the “**Relationships**” card. From there, click on the “**+ LINKED SECTIONS**” button.



3. A window will pop up, complete all relevant fields to “create the Relationship (see below for each field and its definition). Afterwards, click the “**Save**” button and it will create the relationship between the class sections you have linked.



Field Names:

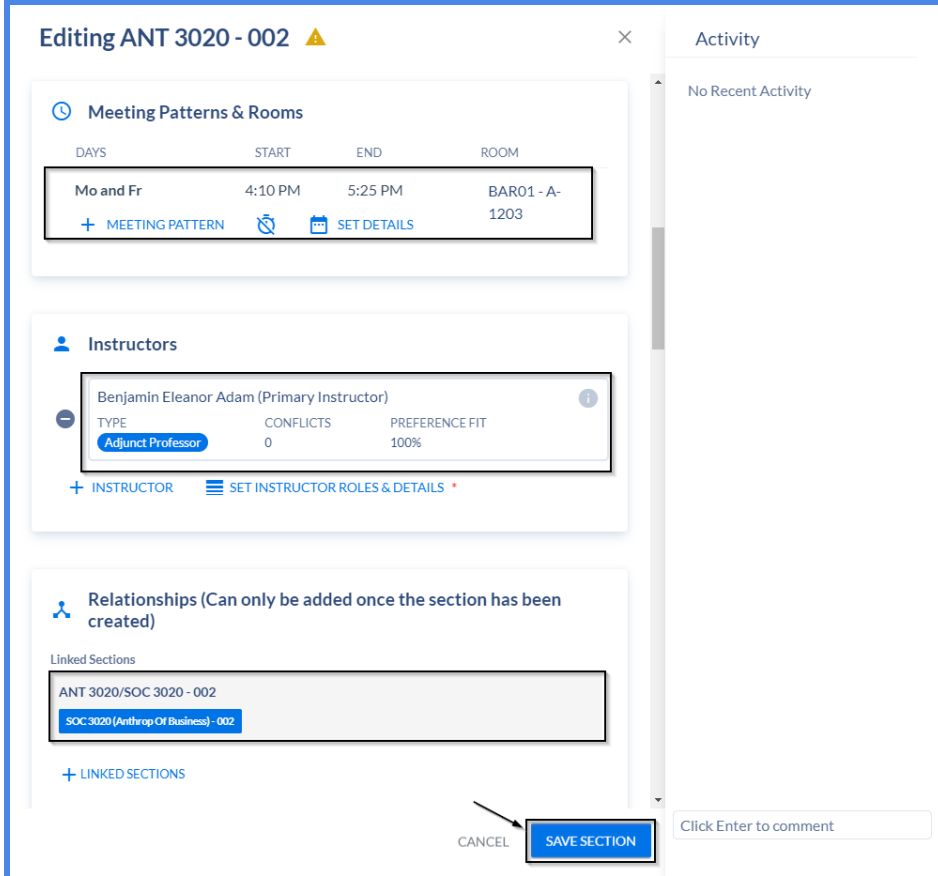
- **“Name”**: Name of the Relationship
- **“Combined Max enrollment”**: The overall max enrollment for all the class sections you will link (i.e. If SOC 100 and ANT 100 are linked and they have a Combined Max enrollment of 30, the max number of students that can be enrolled to these linked sections is 30).
 - If the Combined Max Enrollment sum is not set, the value will be defined as the sum of the max enrollments of all sections in the relationship.
- **“Combination Type”**: Select ‘*Within Subject*’, ‘*Cross Subject*’, or ‘*Both*’
- **“Combined Max Waitlist”**: The max number of students to be placed on the waitlist for the linked sections once the class is fully enrolled.
- **“Preferred Room Capacity”**: The desired facility with the specific room capacity you want the linked sections to be assigned to.
- **“Notes”**: For Linked Sections only
- **“Courses to add”**: Type in the Course(s) (Subject + Code) you want to link and select it
- **“Sections to add”**: Once a Course has been selected, click on the dropdown and select the Class Section number(s) you would like to link
 - When adding sections to the relationship be sure to select the '+' button. Otherwise, the relationship will not be built.

Relationship Options:

<p>Same Time, Same Day, And Same Room</p>	<p>This is also known as a Shared Space or taught together relationship. These sections are supposed to be taught at the same time and day, and in the same room.</p> <p>With this relationship all Double Booked Instructor and Double Booked Room conflicts will be ignored.</p>
<p>No Relationship</p>	<p>If a user wants to combine two sections that have different meeting patterns, they must set the "Relationship Type" to "No Relationship," which is the same as setting the "Skip Meeting Pattern Edit Flag" to "Y" in Peoplesoft.</p> <p>If this is not done, the relationship will not be able to be created in Peoplesoft.</p>

Note: See [Section Editor Field Mappings](#) for a mapping of Coursedog Relationship fields to the CUNYfirst Combined Sections table to aid in completion.

- Once the Relationship has been created between the class sections, the user may now go to the “**Meeting Patterns & Rooms**” card to add in Days/Times and Room and go to the “**Instructors**” card to add the Instructor(s) who will be teaching both of the linked sections. Afterwards click on the “**SAVE SECTION**” button.



The screenshot shows a web interface for editing a section titled "Editing ANT 3020 - 002". The interface is divided into three main sections:

- Meeting Patterns & Rooms:** A table with columns for DAYS, START, END, and ROOM. The current entry shows "Mo and Fr" days, "4:10 PM" start, "5:25 PM" end, and "BAR01 - A-1203" room. There are buttons for "+ MEETING PATTERN", a calendar icon, and "SET DETAILS".
- Instructors:** A list of instructors. The current instructor is "Benjamin Eleanor Adam (Primary Instructor)". Below the name is a table with columns for TYPE, CONFLICTS, and PREFERENCE FIT. The current values are "Adjunct Professor", "0", and "100%". There are buttons for "+ INSTRUCTOR" and "SET INSTRUCTOR ROLES & DETAILS".
- Relationships (Can only be added once the section has been created):** A section for linking other sections. It shows "Linked Sections" with a list containing "ANT 3020/SOC 3020 - 002" and "SOC 3020 (Anthrop Of Business) - 002". There is a "+ LINKED SECTIONS" button.

At the bottom of the interface, there are three buttons: "CANCEL", "SAVE SECTION", and "Click Enter to comment". An arrow points to the "SAVE SECTION" button.

- A window will pop up and tell the users that there is a Relationship Conflict. This is the normal behavior as you are linking this section to another section that does not have the same Times/Days and/or Room attached. Click the “**SAVE SECTION**” button to continue.

Section Conflicts ✕

⚠ Relationship Conflict (1)
 This section is violating the **Same Time Same Day Same Room** relationship it has with SOC 3020 - 002.

SAVE SECTION

If Real-Time Integration is On: The Integration Status will show the user that if the Class Section was synced and as well the Relationship was synced with CUNYfirst and the rule violation will disappear. The Instructors, Days/Times (including Room) will carry over to the other class section. This also includes the Event ID number generated via CUNYfirst.

Editing ANT 3020 - 002 ✕

✔ This section was **successfully** synced with the SIS on 6/28/2021 at 12:14 PM.

General Information

Class Section required

3 characters (4 allowed)

Component required

Lecture ▼

Edit Relationship ✕

Relationship Information

✔ This relationship was **successfully** synced with the SIS on 6/28/2021 at 12:14 PM.

Name

Type

Linked Sections

Combined Max Enrollment ?

Relationship Courses

Course to add

Type to search for courses ▼

SOC 3020 (Anthrop Of Business) - 002 ✖ i

ANT 3020 (Anthropology of Business) - 002 i

67709 - 001	Not set	Not set	Not set	Not set	Not set
67710 - 002	Benjamin Eleanor Adam	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1203
^ SOC 3020 - Anthrop Of Business (Undergraduate)					
Course Description Anthrop Of Business			⚙️ COURSE INFO 📊 COURSE ANALYTICS		
+ SECTION					
SECTION	INSTRUCTORS	DAYS	START	END	ROOM
67705 - 001	Carla Bellamy	Mo and We	10:00 AM	1:00 PM	BAR01 - A-1000H
67708 - 002	Benjamin Eleanor Adam	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1203

If Real-Time Integration is Off: Confirm that the class section was saved and it has the Days/Time (including Rooms) and Instructor added. The Rule Violation of **'Same Time Same Day Same Room relationship'** will still appear, however, if nightly sync is turned On for the Term, the Class Number and Event ID number will generate for the class section and the Days/Times and Instructor will carry over to its linked section. The rule violation will also disappear.

Editing SOC 1005 - 002 ⌵

📌 This section has not yet been synced with the SIS.

⚠️ This section is violating the **Same Time Same Day Same Room relationship** it has with SOC 3030 - 002.

📄 General Information

Class Section required

3 characters (4 allowed)

Component required

Edit Relationship ✕

Relationship Information

i This relationship has not yet been synced with the SIS.

Name

Type

Linked Sections

Combined Max Enrollment ?

Relationship Courses

Course to add

SOC 3030 (Changing Demographic) - 002 ✖ i

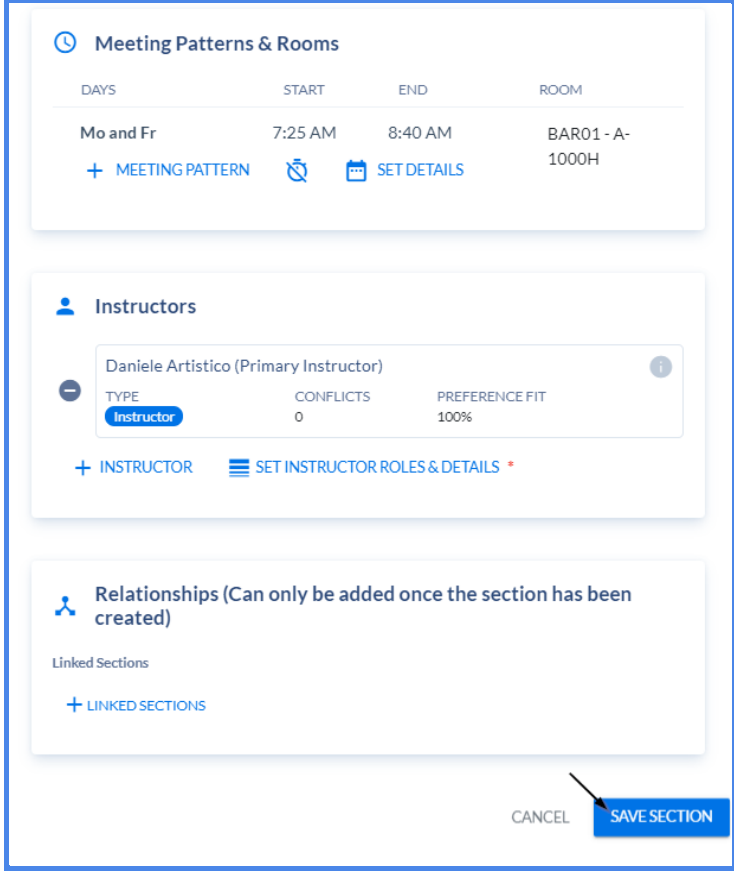
SOC 1005 (Introductory Sociology) - 002 i

SECTION	INSTRUCTORS	DAYS	START	END	ROOM																		
1929 - 001	Christopher Baum	Tu and Th	7:30 PM	8:45 PM	BAR01 - A-1000H																		
1931 - 002	Benjamin Eleanor Adam	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1203																		
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 60%;"> <ul style="list-style-type: none"> ▼ COM 1013 - Public Speaking (Undergraduate) ▲ - ▼ ENG 100 - Basic Writing I (Undergraduate) ▲ ▼ HIS 1000 - Themes in American History (Undergraduate) ▼ HIS 2022 - Europe In 18th Cent (Undergraduate) ▲ ▼ SOC 1005 - Introductory Sociology (Undergraduate) ▲ SOC 3020 - Anthrop Of Business (Undergraduate) </div> <div style="width: 35%;"> <p>⚙ COURSE INFO</p> <p>i COURSE ANALYTICS</p> </div> </div>																							
<p>+ SECTION</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SECTION</th> <th>INSTRUCTORS</th> <th>DAYS</th> <th>START</th> <th>END</th> <th>ROOM</th> </tr> </thead> <tbody> <tr> <td>1930 - 001</td> <td>Not set</td> <td>Tu and Th</td> <td>7:30 PM</td> <td>8:45 PM</td> <td>BAR01 - A-1000H</td> </tr> <tr> <td>1932 - 002</td> <td>Not set</td> <td>Mo and Fr</td> <td>4:10 PM</td> <td>5:25 PM</td> <td>BAR01 - A-1203</td> </tr> </tbody> </table>						SECTION	INSTRUCTORS	DAYS	START	END	ROOM	1930 - 001	Not set	Tu and Th	7:30 PM	8:45 PM	BAR01 - A-1000H	1932 - 002	Not set	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1203
SECTION	INSTRUCTORS	DAYS	START	END	ROOM																		
1930 - 001	Not set	Tu and Th	7:30 PM	8:45 PM	BAR01 - A-1000H																		
1932 - 002	Not set	Mo and Fr	4:10 PM	5:25 PM	BAR01 - A-1203																		

Help



Deleting a Linked Section Relationship

1. Open an existing class section and go to the Relationship card and select the Relationship that is attached to the section. Once you land on the Edit Relationship window, click on the red delete button within the relationship. Afterwards click on the **“SAVE”** button.
2. Once you click on Save, click on the **“SAVE SECTION”** button.




Meeting Patterns & Rooms


DAYS	START	END	ROOM
Mo and Fr	7:25 AM	8:40 AM	BAR01 - A-1000H

+ MEETING PATTERN   SET DETAILS

Instructors

Daniele Artistico (Primary Instructor) 

TYPE	CONFLICTS	PREFERENCE FIT
Instructor	0	100%

+ INSTRUCTOR  SET INSTRUCTOR ROLES & DETAILS *

Relationships (Can only be added once the section has been created)

Linked Sections

+ LINKED SECTIONS

CANCEL **SAVE SECTION**

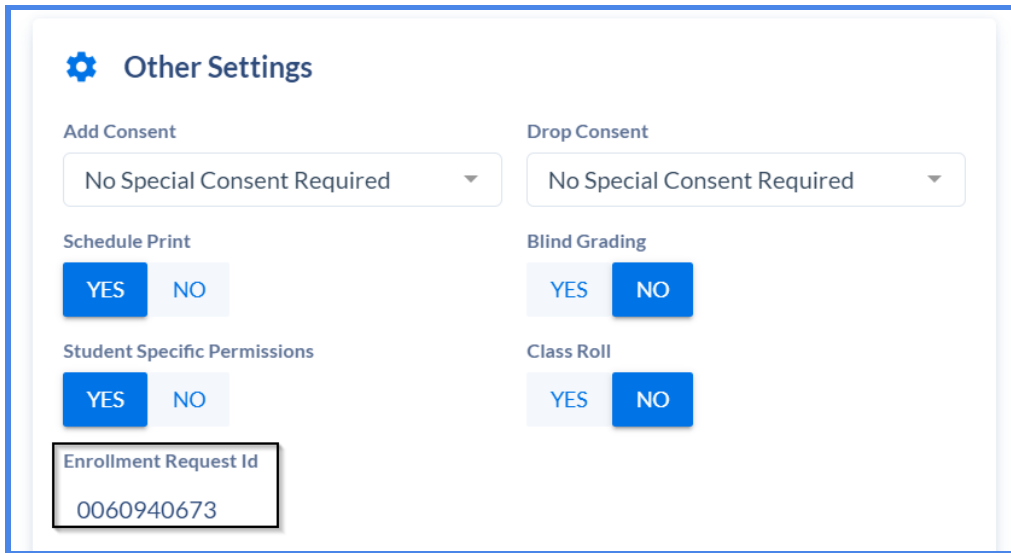
Note: If you delete a linked section, the relationship will be deleted for the section and the sibling automatically, however the meeting patterns will only drop for the section where the relationship was deleted. For example, if BIO1300 - 001 and BIO2200 - 001 are linked, and you delete the relationship from the BIO1300 - 001 in the Section Editor - it will automatically be deleted for BIO2200 - 001.

The meeting pattern will be removed from BIO1300 - 001 but will remain intact for BIO2200 - 001. The user must manually remove the meeting pattern/instructor(s) for that section.

Class Roll

Class Roll is used for when a class section is scheduled and enrollment exists, certain fields that are changed at the Class Associations Component such as Credits (Minimum Units, Academic Progress Units, Financial Aid Units, Billing Factor), Course Count, Tuition Group, Grading Basis and Requirement Designation, must be updated and reflected for all of the students enrolled for that class section.

Once the Class Roll is set to enabled and it syncs to CUNYfirst real-time, behind the scenes CUNYfirst creates an enrollment maintenance transaction through a COBOL process and in return the class section inside the Section Editor will display the Enrollment Request ID related to the transaction made.



Other Settings

Add Consent

Drop Consent

Schedule Print

Blind Grading

Student Specific Permissions


Class Roll

Enrollment Request Id

Note: The Enrollment Request ID number will be displayed for use on the Block Enrollment page in CUNYfirst (Please consult your Registrar on this).

Performing a Class Roll

1. Open a Class Section inside the Section Editor that have students enrolled and edit any of the following fields depending on the transaction being made (e.g. Changed Financial Aid Credits from 3 to 4).


Credits

Billing Factor

Course Contact Hours

Academic Progress Units

Financial Aid Units

[↔ SWITCH TO VARIABLE CREDITS](#)

Note: When editing any of the aforementioned fields, a warning will appear to let the user know that “**Class Roll Button Should Be YES.**” Or else, the user cannot save the class section to perform the Class Roll.

Editing ACC 9993 - MFA !
×

✓ This section was **successfully** synced with the SIS on 9/7/2021 at 3:34 AM.

This section is violating **Class Roll Button Should Be YES:** If the class is scheduled and students are enrolled, and you make changes to Minimum Units, Academic Progress Units, Financial Aid Units, Course Count, Billing Factor, Tuition Group, Grading Basis, or Requirement Designation this affects student enrollment. You therefore need to set YES to update the enrollment records of each student in the class. We suggest that you write down the enrollment request ID numbers for use on the Block Enrollment page (consult your Registrar on this).


If the *Class Roll* button was selected to YES, without editing any of the aforementioned fields, a similar warning will appear to state that **“Class Roll Button Should Not Be Yes.”** Class Roll cannot be performed until this is resolved.

Editing ACC 9993 - MFA ! ×

✓ This section was **successfully** synced with the SIS on 9/7/2021 at 3:34 AM.

! This section is violating **Class Roll Button Should Not Be YES:** In order to enable Class Roll, enrollment must exist and at least one of the following fields must be edited; Credits (Minimum Units, Academic Progress Units, Financial Aid Units, Billing Factor), Course Count, Tuition Group, Grading Basis and Requirement Designation.

2. Scroll down to the “Other Settings” card, go to the *Class Roll* field and select YES. The warning will disappear and the user can click on the **“SAVE SECTION”** button.

 **Other Settings**

Add Consent

No Special Consent Required ▾

Drop Consent

No Special Consent Required ▾

Schedule Print

YES NO

Blind Grading

YES **NO**

Student Specific Permissions

YES NO

Class Roll

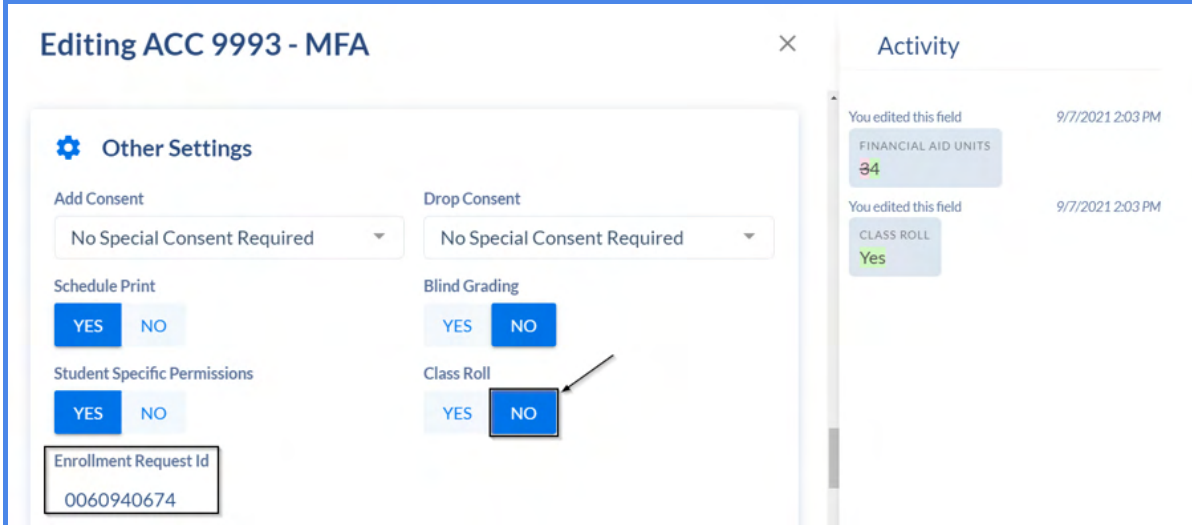
YES NO

Enrollment Request Id

—

CANCEL **SAVE SECTION**

- Once the class section saves and syncs to CUNYfirst in real-time, the Enrollment Request ID field will populate and the Class Roll button will be set back to NO. The user will be able to use this for the Block Enrollment page in CUNYfirst, to update the enrollment records of the students in the Class Section.



Editing ACC 9993 - MFA

Other Settings

Add Consent: No Special Consent Required

Drop Consent: No Special Consent Required

Schedule Print: YES NO

Blind Grading: YES NO

Student Specific Permissions: YES NO

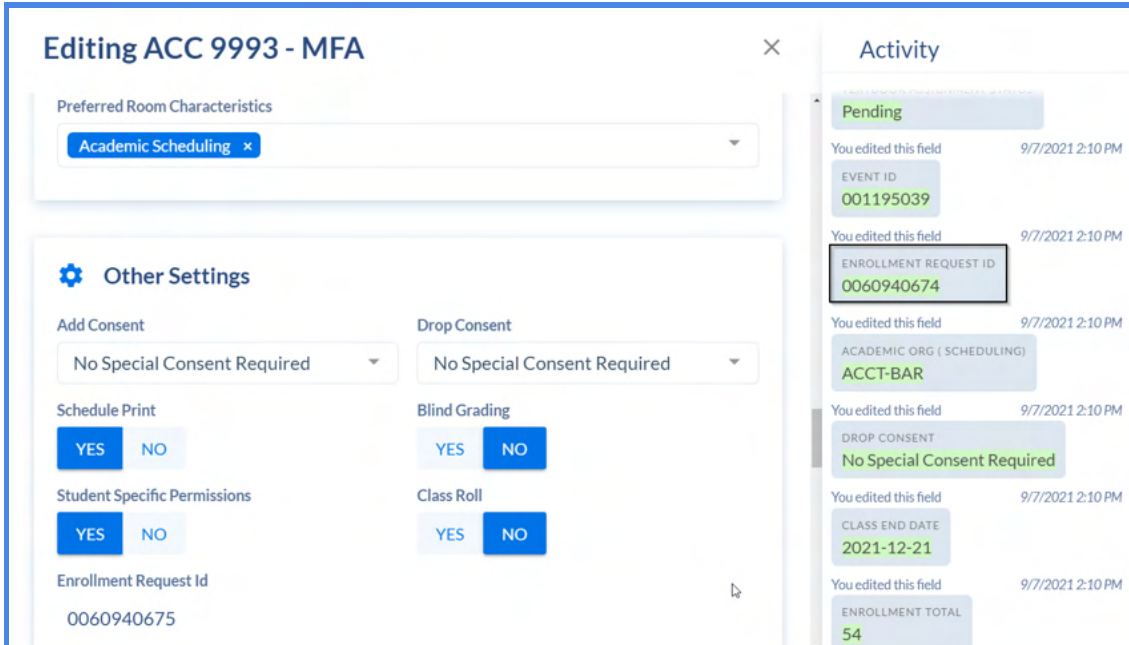
Class Roll: YES **NO**

Enrollment Request Id: 0060940674

Activity

- You edited this field 9/7/2021 2:03 PM: FINANCIAL AID UNITS 34
- You edited this field 9/7/2021 2:03 PM: CLASS ROLL Yes

Note: If the user performs the Class Roll multiple times for a particular class section, the Enrollment Request ID field will display the latest transaction. The historical Enrollment Request IDs can be viewed in the Activity Log and/or in the Sections History Report via Reports.



Editing ACC 9993 - MFA

Preferred Room Characteristics: Academic Scheduling

Other Settings

Add Consent: No Special Consent Required

Drop Consent: No Special Consent Required

Schedule Print: YES NO

Blind Grading: YES NO


Student Specific Permissions: YES NO

Class Roll: YES NO



Enrollment Request Id: 0060940675

Activity

- Pending
- You edited this field 9/7/2021 2:10 PM: EVENT ID 001195039
- You edited this field 9/7/2021 2:10 PM: **ENROLLMENT REQUEST ID 0060940674**
- You edited this field 9/7/2021 2:10 PM: ACADEMIC ORG (SCHEDULING) ACCT-BAR
- You edited this field 9/7/2021 2:10 PM: DROP CONSENT No Special Consent Required
- You edited this field 9/7/2021 2:10 PM: CLASS END DATE 2021-12-21
- You edited this field 9/7/2021 2:10 PM: ENROLLMENT TOTAL 54





Baruch
COLLEGE


HELP CENTER  

2021 Fall Term

Accountancy


SAVED VIEWS


FILTER


REFRESH

NAME	DESCRIPTION	DOWNLOAD
Course List	This report is a CSV file containing all courses active in scheduling for the selected term.	DOWNLOAD
Course Sections List	This report is a CSV file containing all course sections in the Coursedog system for the given term.	DOWNLOAD
Section Credit Comparisons	This report is a CSV file that lists the credits of each section, as well as any min/max range specified on the section's course.	DOWNLOAD
New Course Sections List	This report is a CSV file containing all sections created within the Coursedog system.	DOWNLOAD
Course and Sections Mismatch List	This report is a CSV file containing mismatches between section data and course data	DOWNLOAD
Deleted Course Sections List	This report is a CSV file containing all sections deleted within the Coursedog system.	DOWNLOAD
Sections History Report	This report is a CSV file containing all changes that have been made to sections.	DOWNLOAD

🏠 Overview

☰ Sections

⚠️ Conflicts

👤 Instructors

📅 Times

🏠 Rooms

⌛ Bottlenecks

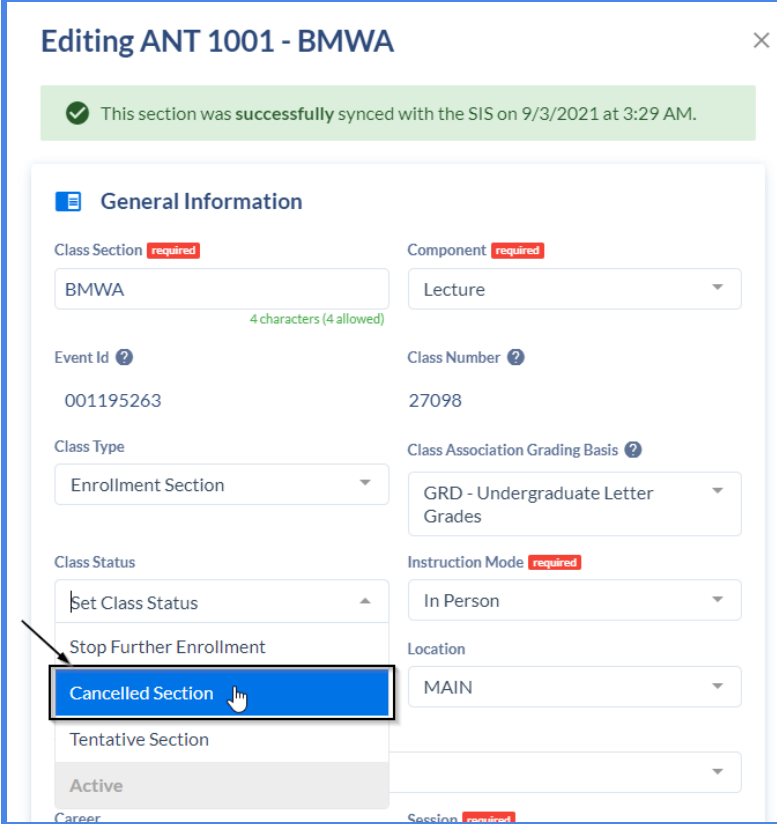
👥 Enrollment

⬆️ Export

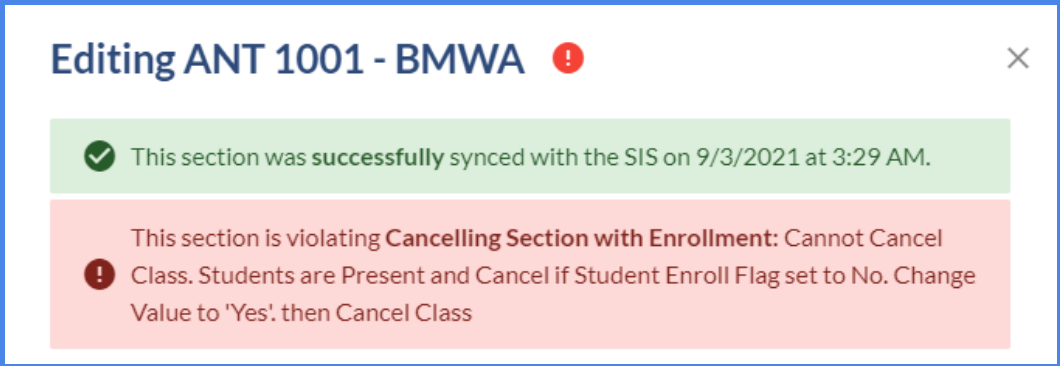
Reports

Canceling Class Sections

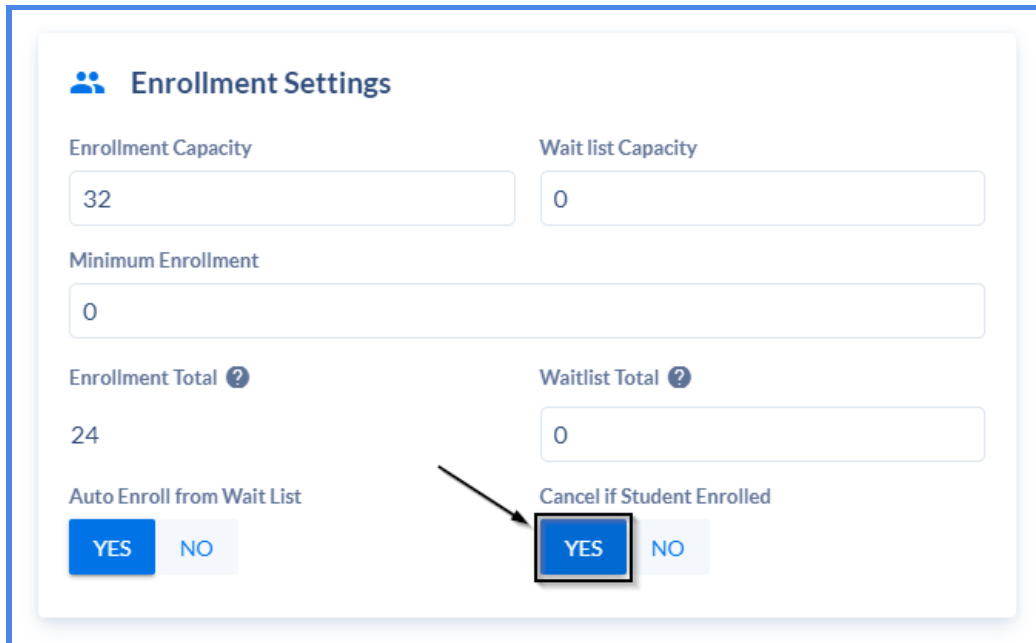
1. Open a class section inside the Section Editor and head over to the General Information Card. Click on the Class Status field and select *Cancelled Class Section*.



Note: If Enrollment exists for the class section, a warning will appear to remind the user that they cannot successfully cancel the class section unless the “Cancel if Student Enroll” must be set to YES.



Scroll down to the “Enrollment Settings” card and select YES for “Cancel if Student Enrolled” field. Afterwards, the warning will disappear.



Enrollment Settings

Enrollment Capacity: 32

Wait list Capacity: 0

Minimum Enrollment: 0

Enrollment Total: 24

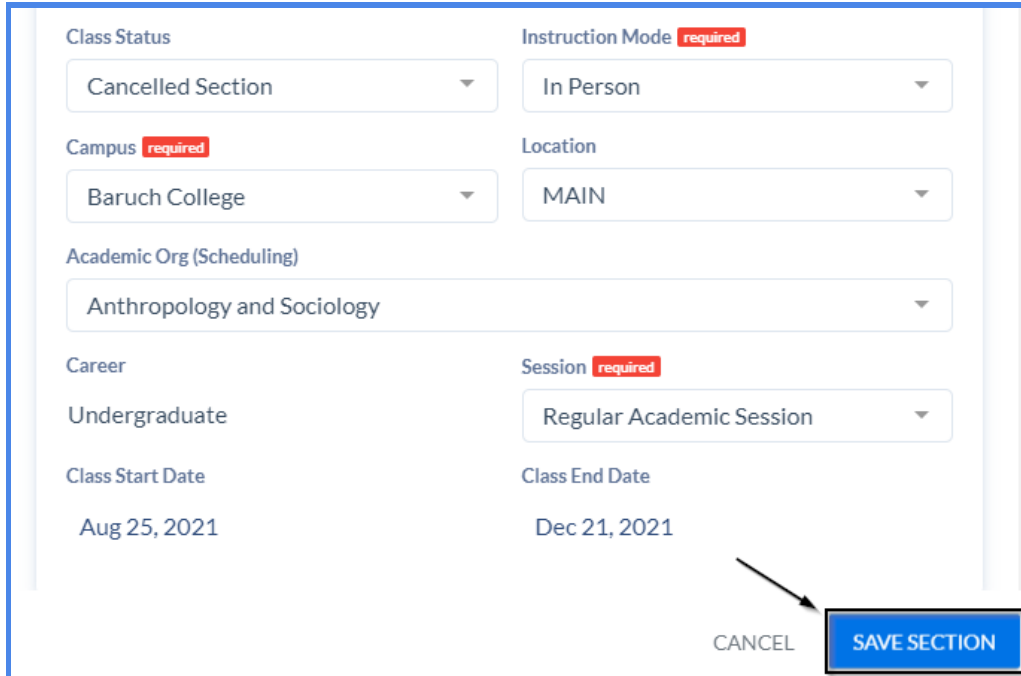
Waitlist Total: 0

Auto Enroll from Wait List: YES (selected) NO

Cancel if Student Enrolled: YES (selected) NO

An arrow points to the 'YES' button for 'Cancel if Student Enrolled'.

2. Select the **'SAVE SECTION'** button and let it sync to CUNYfirst, if real-time integration is turned ON.



Class Status: Cancelled Section

Instruction Mode **required**: In Person

Campus **required**: Baruch College

Location: MAIN

Academic Org (Scheduling): Anthropology and Sociology

Career: Undergraduate

Session **required**: Regular Academic Session

Class Start Date: Aug 25, 2021

Class End Date: Dec 21, 2021

CANCEL SAVE SECTION

An arrow points to the 'SAVE SECTION' button.

- Once this syncs successfully, the status will change to *Cancelled Section* and the meeting pattern/instructor (including Enrollment - if it exists) will be dropped in CUNYfirst.

Favorites | Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

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

Course ID: 090089 Course Offering Nbr: 1
 Academic Institution: Baruch College
 Term: 2021 Fall Term Undergrad
 Subject Area: ANT ANT - Anthropology
 Catalog Nbr: 1001 Intro to Cultural Anthropology

Enrollment Control Find | View All First 1 of 21 Last

Session: 1 Regular Academic Session Class Nbr: 27098
 Class Section: BMWA Component: Lecture Event ID:
 Associated Class: 1 Units: 3.00

*Class Status: **Cancelled Section** Cancel Class 09/03/2021

Class Type: Enrollment Enrollment Status: Closed
 *Add Consent: No Consent Requested Room Capacity: 32 Total
 *Drop Consent: No Consent Enrollment Capacity: 32 0
 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

Save Return to Search Previous in List Next in List Notify

Favorites | Main Menu > Curriculum Management > Schedule of Classes > Maintain Schedule of Classes

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

Course ID: 090089 Course Offering Nbr: 1
 Academic Institution: Baruch College
 Term: 2021 Fall Term Undergrad
 Subject Area: ANT ANT - Anthropology
 Catalog Nbr: 1001 Intro to Cultural Anthropology

Class Sections Find | View All First 1 of 21 Last

Session: 1 Regular Academic Session Class Nbr: 27098
 Class Section: BMWA Component: Lecture Event ID:
 Associated Class: 1 Units: 3.00

Meeting Pattern Find | View All First 1 of 1 Last

Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	T	F	S	S	*Start/End Date
												08/25/2021 12/21/2021

Topic ID: Free Format Topic:
 Print Topic On Transcript [Contact Hours](#)

Instructors For Meeting Pattern Personalize | Find | View All First 1 of 1 Last

Assignment | Workload

ID	Name	*Instructor Role	Print	Access	Contact	Empl Rcd#	Job Code
		Prim Ins	<input checked="" type="checkbox"/>			0	

Note: The meeting pattern/instructor (including Enrollment Total) will still be in Coursedog but will be wiped out after the nightly sync.

Reviewing and Finalizing a Department's Schedule

Reviewing Data in the Section Editor

1. To review data entered by a department scheduler, navigate to the home page of the scheduling platform and click on the department you wish to review:

Departmental Status (2021 Fall Term)						
NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	VALIDATION	SUBMISSION
Accountancy	No Schedulers	24	111	79		In Progress
Anthropology and Sociology	No Schedulers	31	76	45		In Progress
Black and Latino Studies	No Schedulers	18	38	30		In Progress

2. This will display a view of all courses in the department which can be expanded to show all scheduled sections:

2021 Fall Term Anthropology and Sociology Department

SECTIONS INSTRUCTORS

Sections By Course + COURSE VALIDATE SCHEDULE

FILTER CHANGE VIEW

Viewing 1-25 of 31

- ▼ ANT 1001 - Intro to Cultural Anthropology (Undergraduate) ▲
- ^ ANT 1001H - Honors-Intro to Cul Anthro (Undergraduate)

Course Description
Cultural anthropology draws on the humanities, social sciences, and naturalsciences to explore human variation i...

⚙️ COURSE INFO
📊 COURSE ANALYTICS

+ SECTION

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
28140 - FRH	Not set	Not set			Not set

Your review should be focused on validating that the section data was entered accurately, as all conflicts should have been resolved prior to schedule submission.

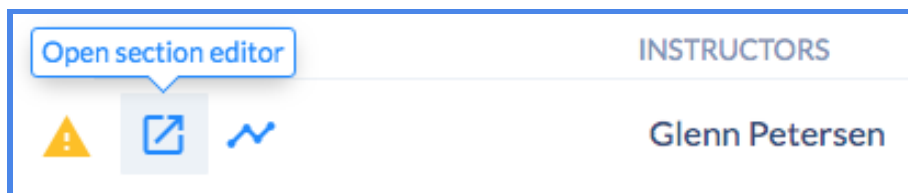
Note: To view an overview of field mappings between Coursedog and Peoplesoft please see [here](#).

Call-out: If a user changes the ‘Class Section Field’ value the display code in the row for the section, LMS Extract Group ID, and the Event ID field, will not update until data is refreshed and re-synced during the nightly merge.

Call-out: The Class Association Grading Basis field is for the Graded Component, and applies to all components.

Call-out: Faculty members may be assigned to the same section twice when needed so that they may be assigned two different EMPLRCD#s.

- To view all fields for each section, hover over the section and click the “**Open section editor**” button:



- This will open a modal with all of the section’s information. You can change the section data at any time but doing so may result in conflicts.

Editing AAS1512 - 006
×

General Information

Class Section: Component:

Event Id: Class Number:

Class Type: Grading Basis:

Class Status: Instruction Mode:

Campus: Location:

Academic Org (Scheduling):

Session:

Class Start Date: Class End Date:

CANCEL
SAVE SECTION

Activity

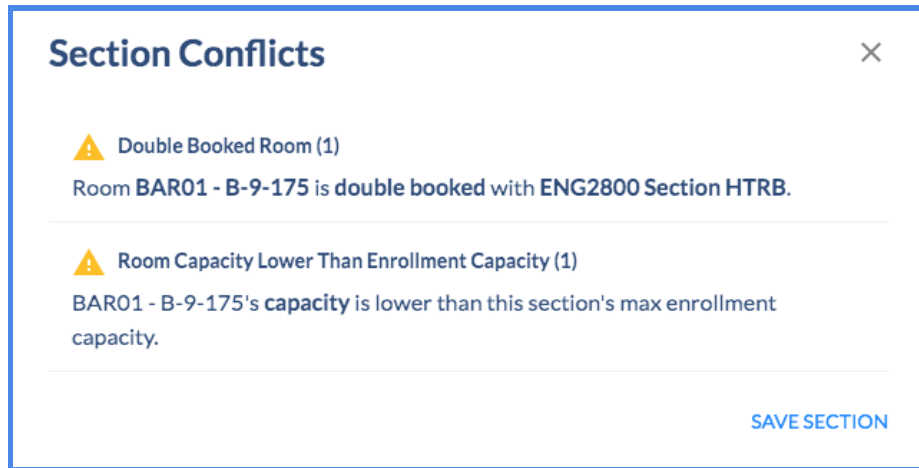
edited this field 5 days ago

edited this field 5 days ago

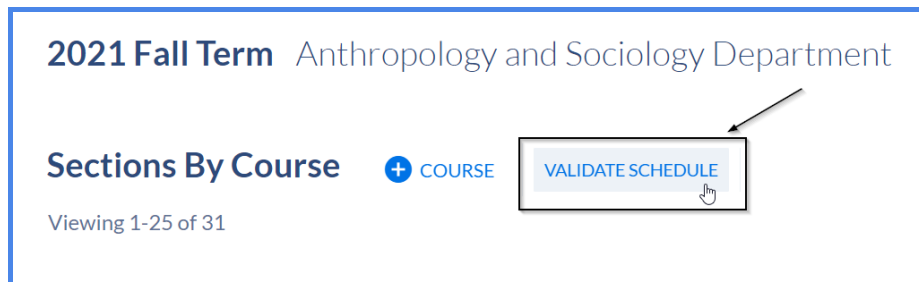
edited this field 5 days ago

edited this field 5 days ago

- When you click “**SAVE SECTION**” after making edits, any conflicts that have been generated will appear :



- To see all conflicts that exist in the selected department, hit the “**VALIDATE SCHEDULE**” button at the top of the screen:



This will present a view of all rule violations in the system that affects the class schedule. These violations must be resolved before you submit your schedule.

- 1) **Section Rules** are conflicts that violate hard rules in the system such as “Double Booked Room,” “Asynchronous Online Room Conflict,” “Days with No Times Violation” etc...

Review Schedule Conflicts ×

As of 09/10/2021 6:34 PM

SECTION RULES
MEETING PATTERN RULES
BOTTLENECKS
PREFERENCES

⚠ **Asynchronous Online Room Conflict** 7

CONFLICT	COURSE CODE	SECTION NUMBER
This section is violating Asynchronous Online Room Conflict : This Asynchronous Online Section Must Assign An Online Facility	ANT 1001	NETC

- 2) **Meeting Pattern Rules** are violated when your schedule is not distributed enough according to the guidelines set up by system administrators. In order to resolve these conflicts you may have to change time assignments for various sections:

Review Schedule Conflicts ×

As of 09/10/2021 6:40 PM

SECTION RULES
MEETING PATTERN RULES
BOTTLENECKS
PREFERENCES

⚠ **Meeting Pattern Conflicts**

RULES	RATIO	CONTAINED
✓ Meeting Pattern Rule 1 A maximum of % of sections can be scheduled within the following time ranges: Mo from 8:00 AM to 10:00 AM	0/0	0%

- 3) **Bottlenecks** shows you a list of all class sections that you are not able to schedule facilities because there are no rooms available to book (e.g. 4 of English Class Sections have the same time/days but only 3 rooms available left to accommodate them).

Review Schedule Conflicts

As of 09/10/2021 7:52 PM

SECTION RULES
MEETING PATTERN RULES
BOTTLENECKS
PREFERENCES

Congratulations! There are no room bottlenecks in your current schedule.

- 4) **Preferences** shows you a list of all section & instructor preferences that are being violated.

Review Schedule Conflicts

As of 09/10/2021 6:45 PM

SECTION RULES
MEETING PATTERN RULES
BOTTLENECKS
PREFERENCES

⚠ Preferred Building Conflict (1)

ANT 1001: Section PMWA – Lawrence & Eris Field Building is not this section's preferred building.

Note: Meeting Pattern Rules and Instructor preferences are not available for this go-live, and thus there should be no instructor preference violations in the system.

Activity Log

The Section Editor provides an Activity Log that audits any changes made to existing class sections and updated in real-time. (Format shows MM/DD/YYYY and HH:MM AM/PM)

Editing SOC 3170 - BMWA

×

✔ This section was successfully synced with the SIS on 9/10/2021 at 4:41 PM.

General Information

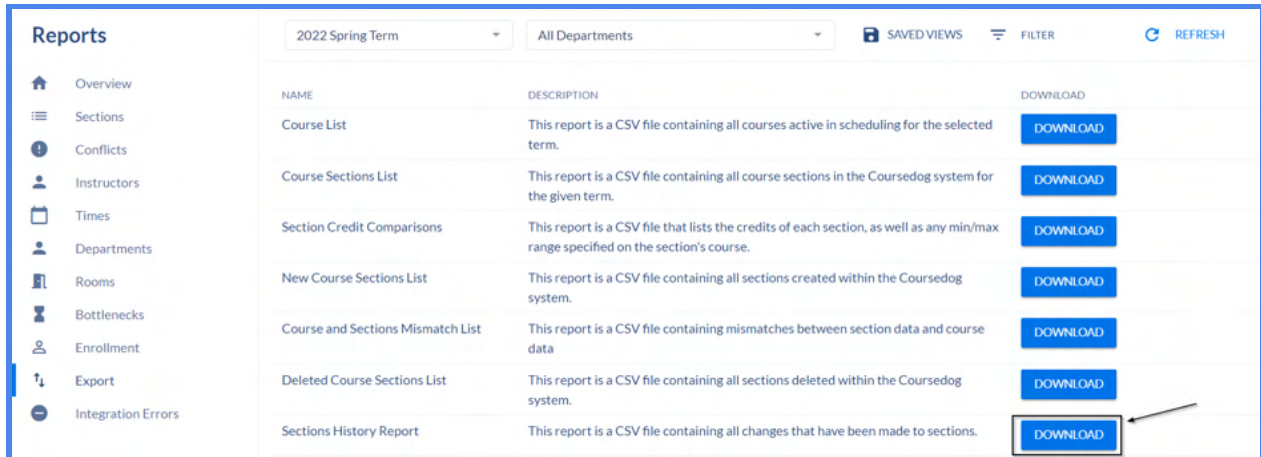
<p>Class Section required</p> <input style="width: 90%;" type="text" value="BMWA"/> <p style="font-size: x-small; color: green;">4 characters (4 allowed)</p>	<p>Component required</p> <input style="width: 90%;" type="text" value="Lecture"/>
<p>Event Id ?</p> <input style="width: 90%;" type="text" value="—"/>	<p>Class Number ?</p> <input style="width: 90%;" type="text" value="28402"/>
<p>Class Type</p> <input style="width: 90%;" type="text" value="Enrollment Section"/>	<p>Class Association Grading Basis ?</p> <input style="width: 90%;" type="text" value="GRD - Undergraduate Letter Grades"/>
<p>Class Status</p> <input style="width: 90%;" type="text" value="Active"/>	<p>Instruction Mode required</p> <input style="width: 90%;" type="text" value="In Person"/>

Activity

You edited this field	9/10/2021 4:41 PM
CLASS SECTION	BMWA
You edited this field	9/10/2021 4:41 PM
COMPONENT	Lecture
You edited this field	9/10/2021 4:41 PM
CLASS START DATE	2021-08-25
You edited this field	9/10/2021 4:41 PM
CLASS STATUS	Active
You edited this field	9/10/2021 4:41 PM
START TIME: ROW 1	9:05 AM
You edited this field	9/10/2021 4:41 PM
END TIME: ROW 1	10:20 AM
You edited this field	9/10/2021 4:41 PM

Note: If multiple users are looking at the same activity log they won't see changes until they refresh in the case where a different user initiates a change.

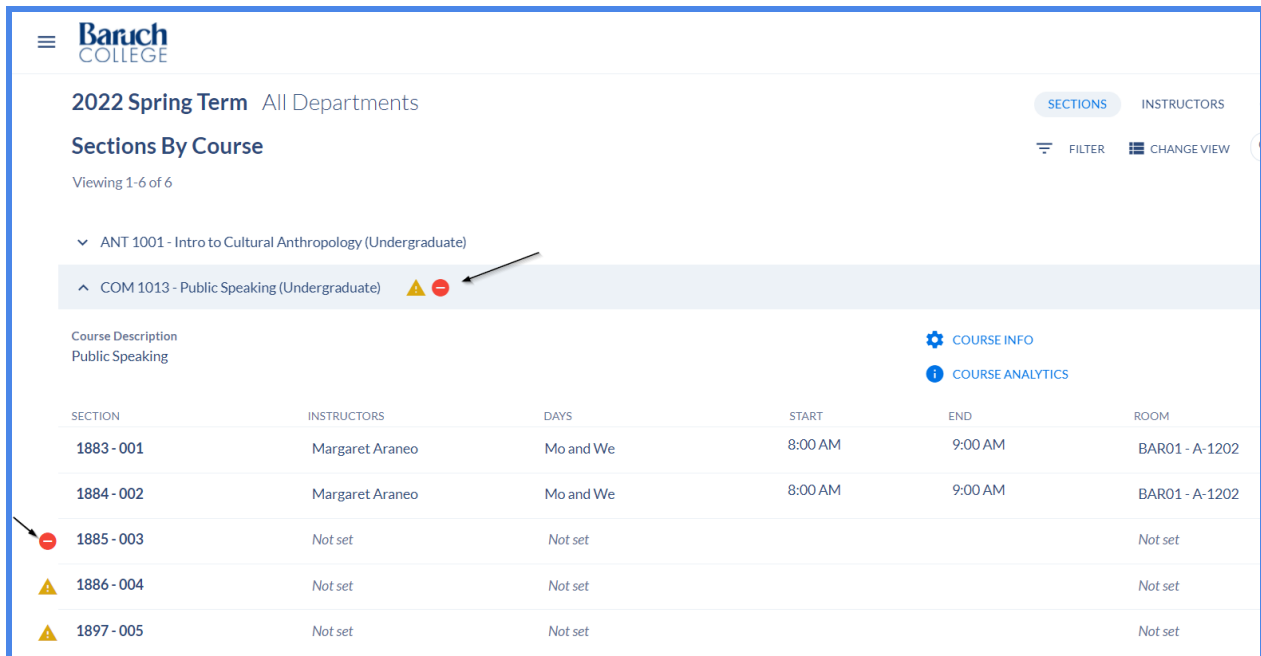
For a holistic view of section version history for all sections navigate to the **'Reports'** from the home page, select **'Export'** on the left-hand side of the screen and find **'Sections History Report'** in the list and select **'Download'** button for a CSV file to show. (For more information on exporting Reports, see the 'Reports' section of this guide.



NAME	DESCRIPTION	DOWNLOAD
Course List	This report is a CSV file containing all courses active in scheduling for the selected term.	DOWNLOAD
Course Sections List	This report is a CSV file containing all course sections in the Coursedog system for the given term.	DOWNLOAD
Section Credit Comparisons	This report is a CSV file that lists the credits of each section, as well as any min/max range specified on the section's course.	DOWNLOAD
New Course Sections List	This report is a CSV file containing all sections created within the Coursedog system.	DOWNLOAD
Course and Sections Mismatch List	This report is a CSV file containing mismatches between section data and course data	DOWNLOAD
Deleted Course Sections List	This report is a CSV file containing all sections deleted within the Coursedog system.	DOWNLOAD
Sections History Report	This report is a CSV file containing all changes that have been made to sections.	DOWNLOAD

Inline Integration Errors

Sections displayed in the Section Editor will show a "red" error icon if that section has experienced an integration error during the last merge:





2022 Spring Term All Departments




Sections By Course

Viewing 1-6 of 6

ANT 1001 - Intro to Cultural Anthropology (Undergraduate)

COM 1013 - Public Speaking (Undergraduate)  

Course Description: Public Speaking

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
1883 - 001	Margaret Araneo	Mo and We	8:00 AM	9:00 AM	BAR01 - A-1202
1884 - 002	Margaret Araneo	Mo and We	8:00 AM	9:00 AM	BAR01 - A-1202
 1885 - 003	Not set	Not set			Not set
 1886 - 004	Not set	Not set			Not set
 1897 - 005	Not set	Not set			Not set

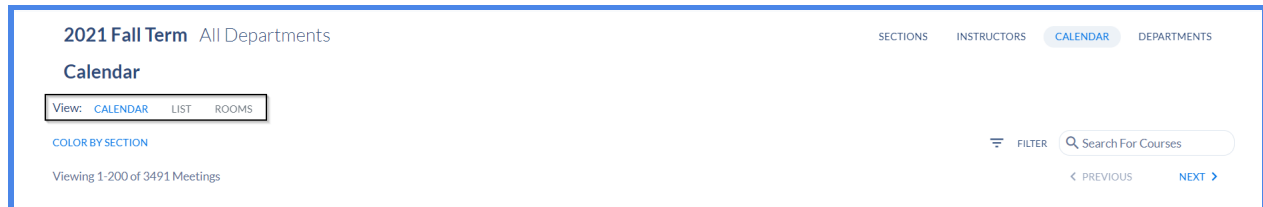
Note: *If a section has both a conflict and an integration error, the section row will only display the icon for the integration error (as there is only space for 1 icon).*

This icon is only visible to users who have the 'View Section Integration Status' permission (i.e. Scheduling Campus Admin role).

*To view a list of all class sections that have Integration Errors, go to the Reports section of the scheduling platform and go to the **Integration Errors Report** (See 'Integration Errors Report' section of this guide).*

Viewing the Calendar in the Section Editor

The calendar view is helpful when reviewing your sections and their start/end times relative to one another. To access, go to the section editor tab on the left-hand side menu, and select the “Calendar” tab on the upper right side in between the “Instructors” and “Departments” tabs:

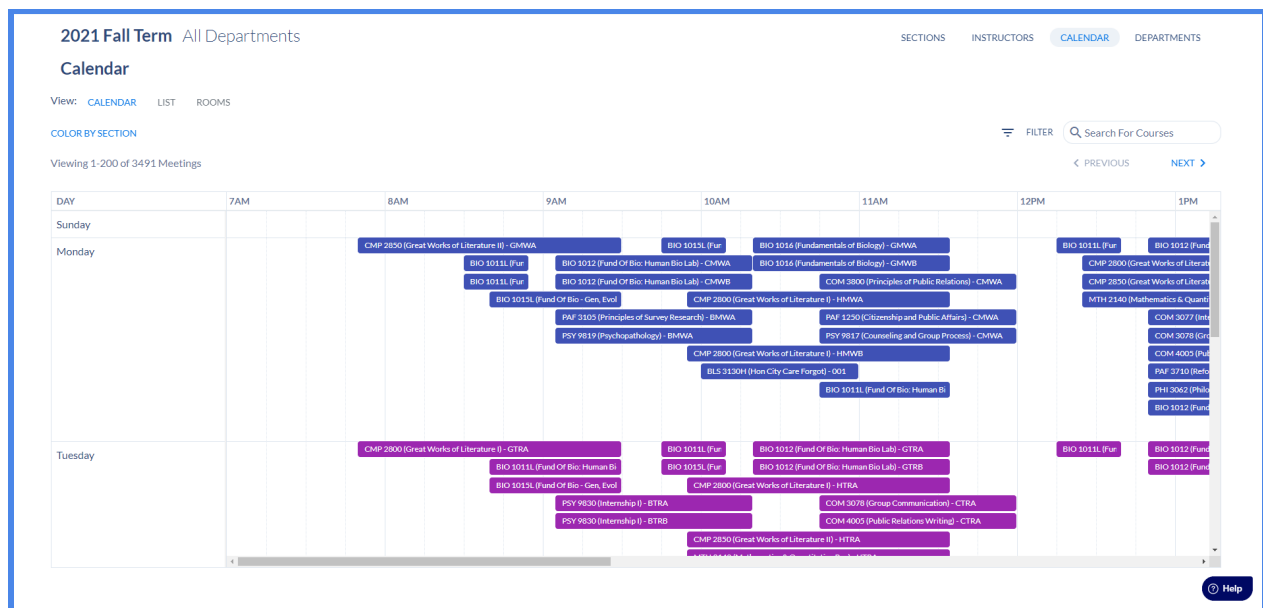


In the top left, you’ll see there are a collection of different views through which you can access the calendar;

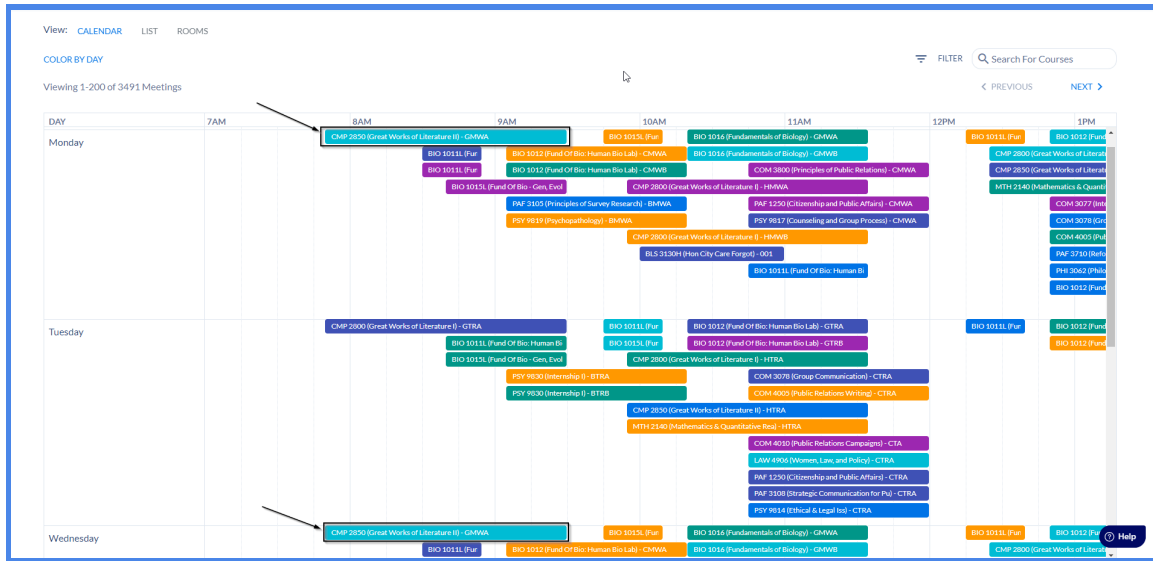
Calendar View

Calendar View is a standard calendar-style visualization of all sections. Under this view, class sections are viewed by distinct colors depending on the selection;

- “**COLOR BY DAY**” is defaulted and this view will show you all class sections that are scheduled for the term by assigning each day a distinct color (e.g. Class Sections that are scheduled on Monday will be colored Dark Purple as opposed to Class Sections that are scheduled on Thursday will be colored Green).

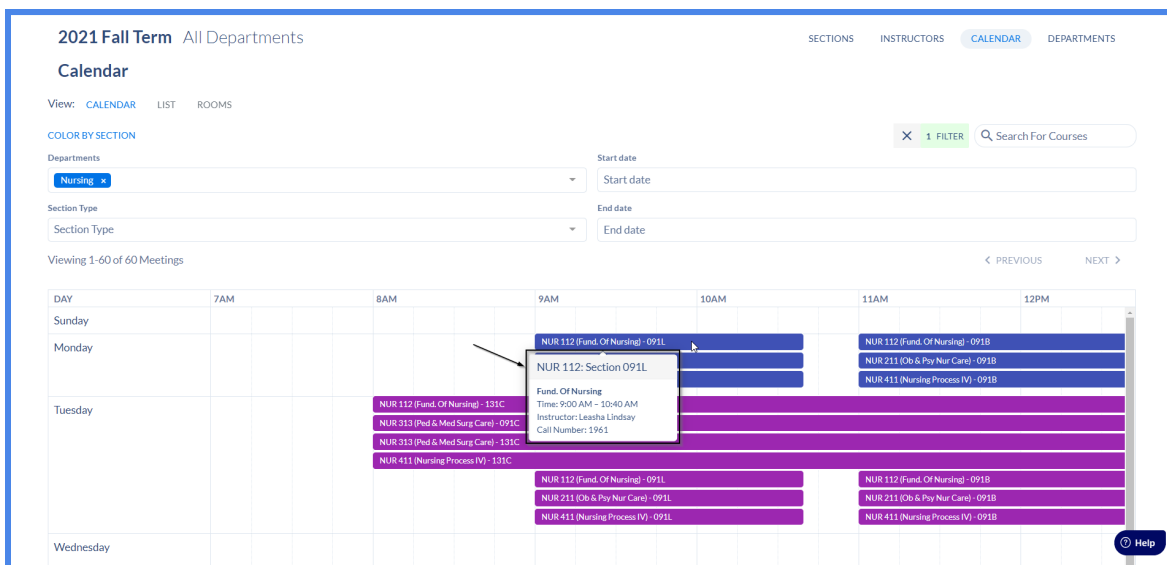


- **“COLOR BY SECTION”** is another view that will show you all class sections that are scheduled for the term by assigning each class section a distinct color code.(e.g. CMP 2850 - GMWB meets on Mondays and Wednesdays from 7:50 a.m. to 9:30 a.m., this class section will be color coded as Teal and it will be depicted on the Calendar on Mondays and Wednesdays).



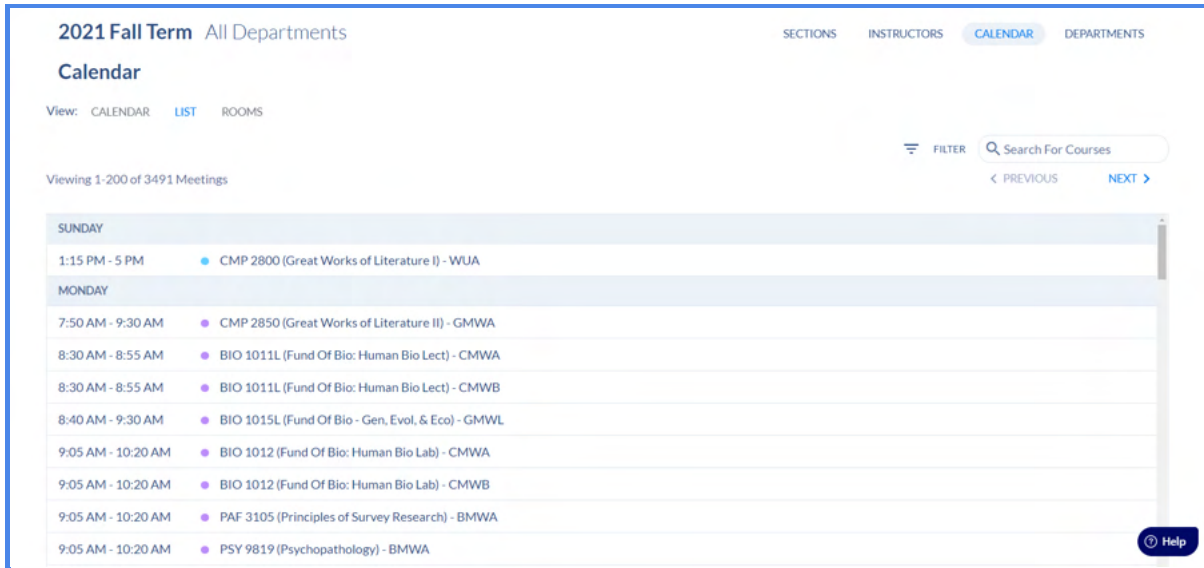
Note: Under this view, you may also use the search engine to search up the course that is scheduled for the term.

If you hover the mouse over a class section, it will reveal to the users additional information on the course that is scheduled for the term (i.e. Title of the Course, Time, Instructor, Call Number [Class Number]).



List View

List View organizes each day of the week and the sections scheduled for each day and their times.



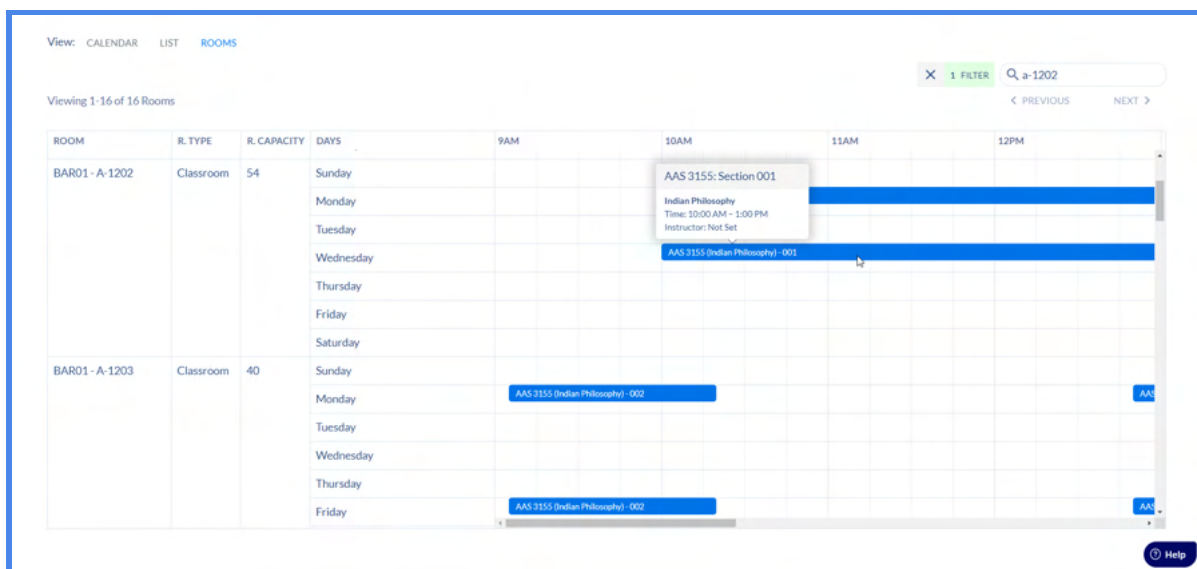
The screenshot shows the '2021 Fall Term All Departments' interface. At the top, there are tabs for 'SECTIONS', 'INSTRUCTORS', 'CALENDAR', and 'DEPARTMENTS'. Below the tabs, the 'Calendar' section is active, with 'View: CALENDAR LIST ROOMS' options. A search bar labeled 'FILTER Search For Courses' is present, along with 'PREVIOUS' and 'NEXT' navigation buttons. The main content area displays a list of meetings for 'SUNDAY' and 'MONDAY'. A 'Help' button is located in the bottom right corner.

Day	Time	Course	Instructor
SUNDAY	1:15 PM - 5 PM	CMP 2800 (Great Works of Literature I)	WUA
MONDAY	7:50 AM - 9:30 AM	CMP 2850 (Great Works of Literature II)	GMWA
MONDAY	8:30 AM - 8:55 AM	BIO 1011L (Fund Of Bio: Human Bio Lect)	CMWA
MONDAY	8:30 AM - 8:55 AM	BIO 1011L (Fund Of Bio: Human Bio Lect)	CMWB
MONDAY	8:40 AM - 9:30 AM	BIO 1015L (Fund Of Bio - Gen, Evol, & Eco)	GMWL
MONDAY	9:05 AM - 10:20 AM	BIO 1012 (Fund Of Bio: Human Bio Lab)	CMWA
MONDAY	9:05 AM - 10:20 AM	BIO 1012 (Fund Of Bio: Human Bio Lab)	CMWB
MONDAY	9:05 AM - 10:20 AM	PAF 3105 (Principles of Survey Research)	BMWA
MONDAY	9:05 AM - 10:20 AM	PSY 9819 (Psychopathology)	BMWA

Note: Under this view, you may also use the search engine to search up the course that is scheduled for the term.

Rooms View

Rooms View breaks down the individual calendar view per-room and displays each room's usage by day of the week and time.



The screenshot shows the 'Rooms View' interface. At the top, there are tabs for 'View: CALENDAR LIST ROOMS'. A search bar labeled '1 FILTER Search a-1202' is present, along with 'PREVIOUS' and 'NEXT' navigation buttons. The main content area displays a grid of room usage. A tooltip for 'AAS 3155: Section 001' is visible, showing details for 'Indian Philosophy' (Time: 10:00 AM - 1:00 PM, Instructor: Not Set). A 'Help' button is located in the bottom right corner.

Room	R. Type	R. Capacity	Days	9AM	10AM	11AM	12PM
BAR01 - A-1202	Classroom	54	Sunday				
			Monday				
			Tuesday				
			Wednesday				
			Thursday				
			Friday				
			Saturday				
BAR01 - A-1203	Classroom	40	Sunday				
			Monday		AAS 3155 (Indian Philosophy) - 002		AAS
			Tuesday				
			Wednesday				
			Friday		AAS 3155 (Indian Philosophy) - 002		AAS

Note: You may use the search engine to find the room where the class sections are specifically assigned in.

Filters

1. Under the **Calendar View** and **List View**, specific filters are utilized to narrow down your search for class sections scheduled in the term;
 - a. **Department field** - Shows you all class sections that are scheduled for the term that belong to a specific department (e.g. If you select the 'English' Department, all English Courses and its' Class Sections will be shown in the view).

2021 Fall Term All Departments

SECTIONS INSTRUCTORS CALENDAR DEPARTMENTS

Calendar

View: CALENDAR LIST ROOMS

COLOR BY SECTION

Departments: English (selected)

Section Type: [Dropdown]

Section Type: [Dropdown]

Viewing 1-200 of 405 Meetings

DAY	7AM	8AM	9AM	10AM	11AM	12PM
Sunday						
Monday		<ul style="list-style-type: none"> ENG 2100 (Writing I) - GMWA ENG 2100 (Writing I) - GMWB ENG 2100 (Writing I) - GMWC ENG 2100 (Writing I) - GMWD ENG 2100 (Writing I) - GMWE ENG 2100 (Writing I) - GMWF ENG 2100 (Writing I) - GMWG ENG 2100 (Writing I) - GMWI ENG 2100 (Writing I) - GMWJ ENG 2100 (Writing I) - GMWK 		<ul style="list-style-type: none"> ENG 2100 (Writing I) - HMWA ENG 2100 (Writing I) - HMWB ENG 2100 (Writing I) - HMWC ENG 2100 (Writing I) - HMWD ENG 2100 (Writing I) - HMWE ENG 2100 (Writing I) - HMWF ENG 2100 (Writing I) - HMWG ENG 2100 (Writing I) - HMWI ENG 2100 (Writing I) - HMWJ 		<ul style="list-style-type: none"> ENG 2100 (Writing I) - BMWA ENG 2100 (Writing I) - BMWB ENG 2100 (Writing I) - BMWC

2021 Fall Term All Departments

SECTIONS INSTRUCTORS CALENDAR DEPARTMENTS

Calendar

View: CALENDAR LIST ROOMS

Departments: English (selected)

Section Type: [Dropdown]

Section Type: [Dropdown]

Viewing 1-200 of 405 Meetings

MONDAY
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWA
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWB
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWC
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWD
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWE
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWF
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWG
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWI
7:50 AM - 9:30 AM • ENG 2100 (Writing I) - GMWJ

- b. **Section Type field** - Filters all class sections by components of the course (e.g. If you select Recitation, all Courses and Class Sections that are scheduled with Recitation will be shown in the view).

The screenshot shows the '2021 Fall Term' calendar interface. The 'Section Type' dropdown menu is set to 'Recitation', indicated by a red arrow. The calendar displays a list of meetings for Monday, including courses like BIO 1011L and BUS 2000H.

- c. **Start Date/End Date fields** - This can be used to filter for sections within a specific term (i.e. sections with different parts of terms). However, this will not show data in another term.

The screenshot shows the '2022 Spring Term' calendar interface. The 'Section Type' is set to 'Lecture' and the 'Departments' filter is set to 'Anthropology and Sociology'. The 'Start date' is set to 'Jan 28, 2022' and the 'End date' is set to 'May 31, 2022', both indicated by red arrows. The calendar displays a grid of sections for Monday through Saturday, with courses like ANT 1001 and SOC 1005.

- Under the **Rooms View**, the **Department field** is utilized to search for rooms that are department owned and as well to narrow down your search for class sections that are assigned to specific rooms owned by the department.

Note: **Section Type field** and **Start/End Date fields** filter the same way under the **Calendar View** and **List View**.

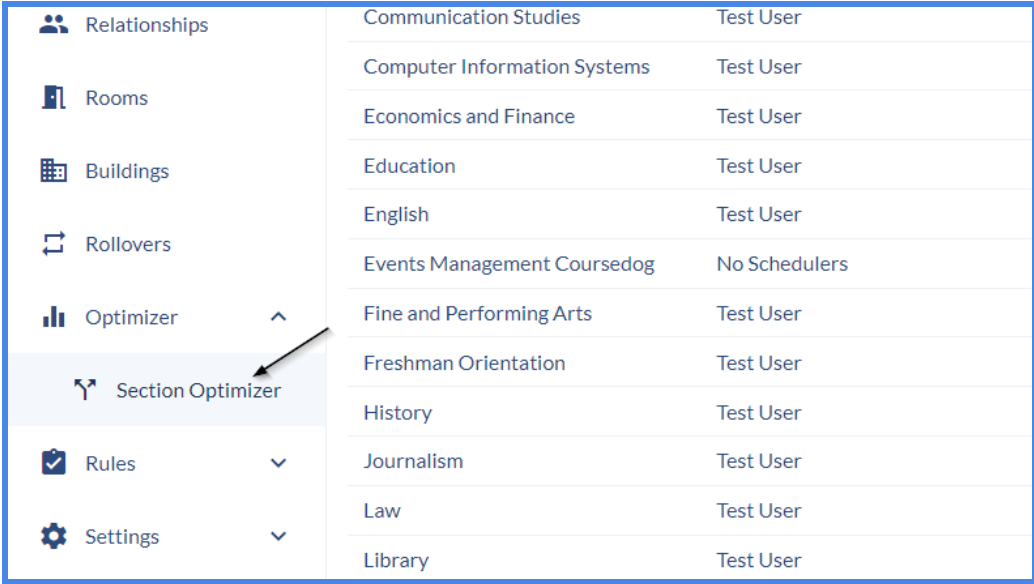
You can utilize the **Department field** and **Section Type field** interchangeably to further narrow down your search (e.g. Under the Calendar View, the user lists ‘Natural Sciences’ department under the **Department field** and lists Lecture and Laboratory under the **Section Type field**, this will only show you class sections that belong to the Natural Sciences department and its class sections that are Laboratory and Lecture components).

Running the Room Optimizer

Once the class schedule is created for your campus, you may proceed to the Section Optimizer to mass assign rooms to the class sections for the entire term.

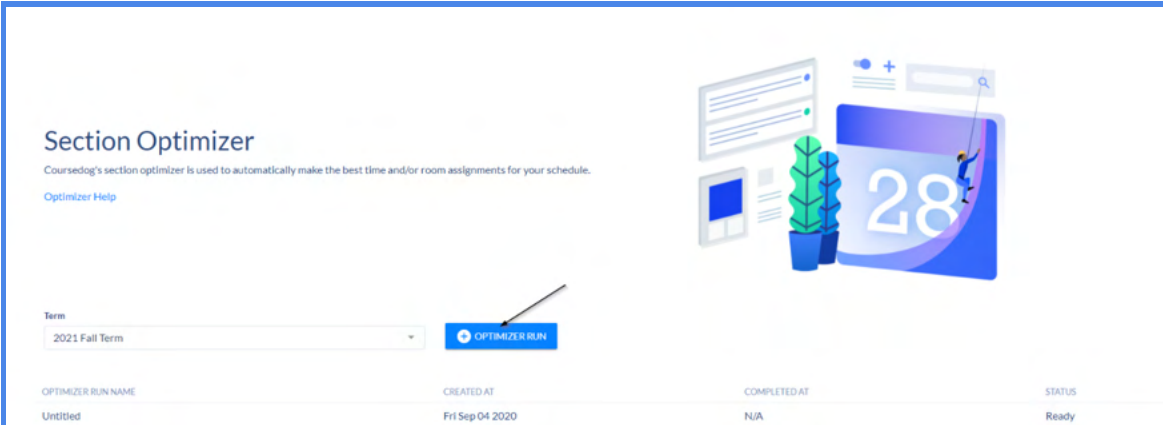
Creating a Run

1. To create a new optimizer run, on the home page go to Optimizer → Section Optimizer, which will bring you to the following page, which shows all existing runs that have been created for each term.



Communication Studies	Test User
Computer Information Systems	Test User
Economics and Finance	Test User
Education	Test User
English	Test User
Events Management Coursedog	No Schedulers
Fine and Performing Arts	Test User
Freshman Orientation	Test User
History	Test User
Journalism	Test User
Law	Test User
Library	Test User

2. To create a new run, first select the term for which you want to create a run, and then click **“+ Optimizer Run”**.



Section Optimizer
Coursedog's section optimizer is used to automatically make the best time and/or room assignments for your schedule.
[Optimizer Help](#)

Term: 2021 Fall Term **+ OPTIMIZER RUN**

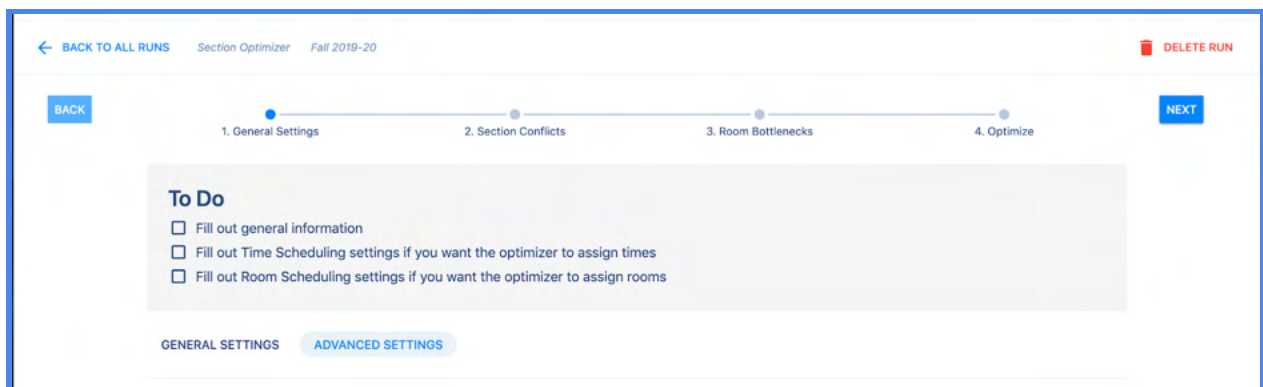
OPTIMIZER RUN NAME	CREATED AT	COMPLETED AT	STATUS
Untitled	Fri Sep 04 2020	N/A	Ready

Additionally, this page will also show you the status of all existing runs and indicate when a run has been completed.

Once you create a run, you will be redirected to the Optimizer Settings page. On the top of the page will be a progress bar that contains the following elements (see below for example):

Element Name	Description
General Settings	Contains all optimizer settings
Section Conflicts	Displays all section-level conflicts that might impact optimizer performance
Room Bottlenecks	Displays all potential room bottlenecks that might impact optimizer performance
Optimize	Contains the “Run Optimizer” button - intended to be clicked after all settings are defined, and conflicts/bottlenecks have been resolved.

Additionally, each page contains a “*To Do*” checklist, indicating what needs to be accomplished on each page before moving forward.

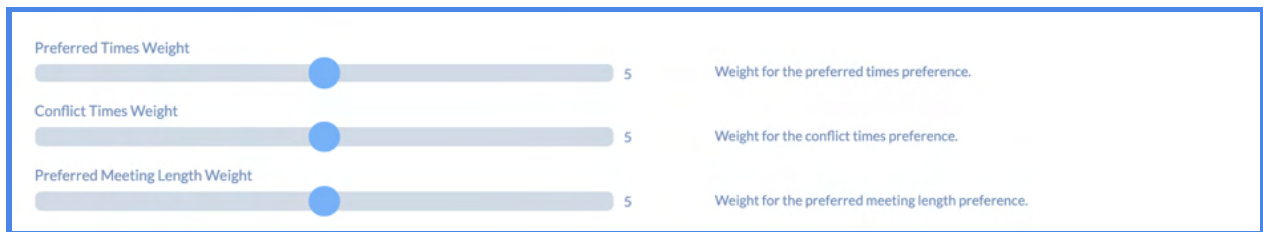


Settings that Do Not Change

CUNY users **should not change the following settings** on the optimizer, as we are currently restricting the optimizer to be used for room assignments only:

The following are three time-related preferences:

- Preferred Times Weight
- Conflict Times Weight
- Preferred Meeting Length Weight

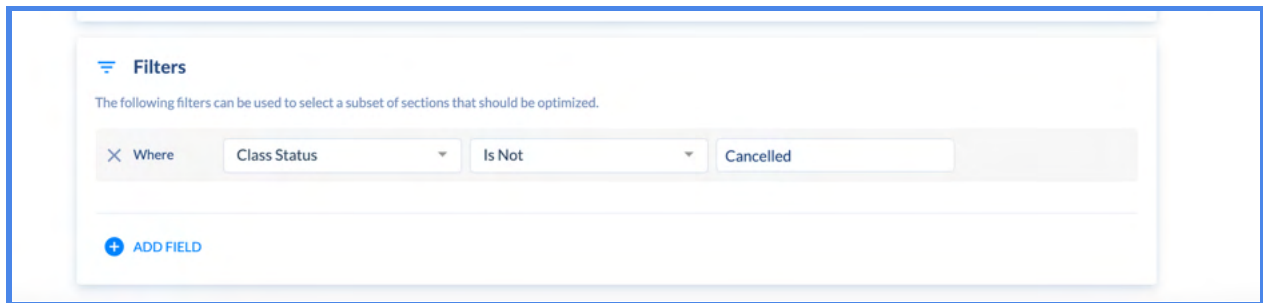


If CUNY users do change these settings, it could negatively affect optimizer results.

Cancelled Sections in the Optimizer

All sections (including cancelled sections) are automatically included in the optimizer unless specifically excluded. To exclude cancelled sections, set the below filter:

- Where -> "Class Status" -> "Is Not" -> "Cancelled"



Combined Maximum Enrollment in the Optimizer

If the optimizer is assigning rooms to a section in a relationship, the max enrollment capacity value that the optimizer will look at to determine what rooms are large enough for that section, will be the Relationship's Combined Max Enrollment:

Edit Relationship ✕

Relationship Information

Name

Type

Linked Sections

Combined Max Enrollment ?

Relationship ?

i This relationship causes all double booked instructor and room conflicts between the sections to be ignored.

Notes

Relationship Courses

Course to add

■ ANT3700 (Introduction to Anthropology) - 02

DELETE
CLOSE
SAVE

e.g. If you have two sections (Section A & B) in a relationship with a Combined Max Enrollment of 50, and the optimizer has a Minimum Seat Utilization of 50%, then the optimizer will try to assign a room with a capacity between 50 & 100 to both sections.

If there is no Combined Max Enrollment value set on the relationship, then the optimizer will sum up the enrollment capacities of all of the individual sections, and use that value as the combined max enrollment:

For example, let's say we have

Section A: Max Enrollment - 12

Section B: Max Enrollment - 18

The Calculated Combined Max enrollment for these two sections used by the optimizer is 30.

Optimizer Potential Conflicts/Issues

Once you have created an optimizer run, and defined the optimizer settings, you will be presented with two pages that are intended to help identify issues that may negatively impact optimizer performance and results.

Optimizer Settings

The optimizer has many settings that will define the behavior of the optimizer. These settings are defined before a run is started, in the optimizer settings page, shown below:

The settings are divided between **General** and **Advanced** settings. General settings are commonly adjusted settings, while advanced settings are less commonly adjusted and relate to more specific preferences and constraints. The below table describes the functionality of each individual setting both on the general and advanced levels.

General Settings

The optimizer has the following settings under General Settings:

General Information Card	
Setting Name	Description
Optimizer Run Name	The name of the Optimizer
Academic Departments	Which academic departments will be included in the optimizer. Default is to “ <i>All Departments</i> ,” however, the optimizer can be run for specific departments if needed.
Send Email Notifications	Indicate whether you would like to receive an email notification when the run is completed. Note that this is defaulted to yes but can be set to no if desired.

General Information

Optimizer Run Name
 Name of optimizer run. For example, Spring 2019 Room Assignment.

Academic Departments
 This setting is used to run the optimizer for specific academic departments. Default is all departments.

Send Email Notifications
 Coursedog will send you an email notification when the optimizer run has been completed.

Note: Although an optimizer run can be created for a specific Department (i.e. Math Department), **the optimizer will still take into account all the courses/sections of all the Academic Departments and check for Section Conflicts and Room Bottlenecks** as it is looking at all possible scenarios for room assignments that may have impact on the Department and its courses and sections you are creating a run for.

Room Scheduling Card	
Setting Name	Description
Assign Rooms	A Yes/No input used to indicate if the optimizer should perform Room Optimization, assigning the best-fit rooms to sections. The optimizer brings in all rooms that are available to be scheduled (e.g. rooms that are coded with '43' in CUNYfirst)
Minimum Seat Utilization	A percentage input that indicates the minimum enrollment capacity to room capacity ratio allowed. For example, if the Minimum Seat Utilization is set to 50%, then a section with an enrollment capacity of 20 can be in a room with a capacity of 40, but a section with an enrollment capacity of 19 cannot be in a room with a capacity of 40. This is a hard constraint. If a particular room does not get assigned to a section, the first check a user should make is if that room

	satisfies the minimum seat utilization. See below for an example.
--	---

Room Scheduling

Assign Rooms

The optimizer will assign the best-fit room to each section included.

Minimum Seat Utilization

50%

The minimum percentage of max enrollment divided by room capacity.

Example of Minimum Seat Utilization Setting

Here is an example of how the optimizer uses the minimum seat utilization setting - let's say a course, Course X, has a maximum capacity of 20 and minimum seat utilization is set to 50%.

Minimum Seat Utilization

50

The minimum percentage of max enrollment divided by room capacity.

The optimizer has 3 rooms to select from, Room S 237, Room S 238, and Room S 313, with room capacities of 25, 42, and 12, respectively.

S 237	Green Hall	Seminar	25
S 238	Green Hall	Seminar	42
S 313	Green Hall	Seminar	12

- The optimizer will not assign Room S 313 as it cannot accommodate the maximum capacity for the course.
- The optimizer will not assign Room S 238 as seat utilization would be less than 50% (only 48% of the seats would be occupied by students in Course X).
- The optimizer will assign Room S 237 as it can accommodate the maximum capacity for the course and seat utilization would be greater than 50%.

Note: *If the minimum seat utilization is set to 0%, that means there is no minimum seat utilization restriction (e.g. A class section that has enrollment capacity of 5 students could be assigned to a room that has a capacity of 5 or greater).*

The optimizer will look at the preferred room capacity (i.e. Room Preferences Card) and try to assign a room that is close to this preference. If the system is unable to find the class section a room that has a capacity that is equal to its max enrollment capacity, then there is a possibility that the optimizer will assign a class section to a room that has a capacity greater than the max enrollment.

Back to Back Preferences Card	
Setting Name	Description
Back to Back Preferences	A Yes/No/Neutral input that will dictate whether the optimizer should seek to schedule sections back to back. Note that CUNY will not be using time optimization, so this setting should be used to dictate whether back to back sections should be taught in the same room, often to satisfy faculty preferences.
Back to Back Duration	If two sections are intended to have back to back meeting patterns, what is the maximum length of time between two meeting patterns before they are not considered back to back? For context, this often is the length of a school's 'passing period' between classes (ex. 20 minutes between two different sections of a math course)
Same Room	A Yes/No input indicating whether the optimizer should schedule back to back sections in the same room. If 'Yes,' or 'Neutral,' is selected above, users will likely want to select 'Yes' for this input to impact room assignments.

<p>Max Number</p>	<p>This input allows users to dictate how many sections should be scheduled back to back. For CUNY users, the question is what is the maximum number of back to back sections that should be scheduled in the same room?</p> <p>For example, if there was a Math course with four sections taught by the same faculty member, and a limit of two back to back sessions was set so as to offer more scheduling flexibility for instructors, only two of four sections would be scheduled back to back.</p>
<p>Enrollment Difference</p>	<p>This setting dictates the maximum percent difference in enrollment capacity for sections to be considered back to back. What is the maximum difference in enrollment two sections can have before they are not considered back to back</p> <p>e.g., if a faculty member is teaching two classes back to back and one class has an enrollment capacity that is double the enrollment capacity of the other class, should they still be recognized as back to back?</p> <p>Note: Enrollment capacity is calculated as the ratio in the difference in enrollment between the two sections to the larger of the two sections</p> <p>Example: if an instructor is teaching a 30 person lecture and then a 15 person seminar, should the optimizer recognize these as back to back? Increasing the value of the slider in the optimizer will increase the threshold for sections to be identified as back-to-back sections. For example, if it is set to 50%, differences in enrollment capacity of 50% or less would be considered back to back, whereas differences in enrollment capacity of over 50% would not be considered back to back.</p>

← Back To Back Preferences

Preference
 Select Back To Back Preference. Neutral means optimizer behavior will not change to accommodate back to back sections.

Back To Back Duration
 The maximum number of minutes allowed between back-to-back sections.

Same Room
 YES NO Select if optimizer should try to assign back to back sections in the same room.

Max Number
 Set Max Number of sections that can be back to back. If not set, there is no maximum.

Enrollment Difference
 100% Set maximum percent difference in enrollment capacity for sections to be considered back to back.

Note: If enrollment difference is set to 50%, as demonstrated above, a 30 person lecture and a 15 person seminar could be considered back to back, whereas a 30 person seminar and 14 person seminar could not be considered back to back.

When enrollment difference is utilized, it does not matter the order of class sections that are taught back to back from an instructor (e.g. An instructor teaching a class section that has an enrollment capacity of 15 students and afterwards teaches a class section that has an enrollment capacity of 30 students or when an instructor is teaching a class section with 30 students and the section after that has an enrollment capacity of 15 students). The Enrollment Difference is based on the ratio of the difference in enrollment capacity to the larger of the two class sections.

Filters Card	
Setting Name	Description
Filters	This setting filters the sections the optimizer will assign rooms to i.e., 'Where Section Type Contains Lab'

Filters

The following filters can be used to select a subset of sections that should be optimized.

No fields added yet.

+ ADD FIELD

Note: This does not filter the rooms that are included in the optimizer. Rooms that should be excluded from the optimizer but available for manual assignment should be coded with code '43' and '96' in CUNYfirst.

Please reach out to your CUNY Central Contact (Office of the University Registrar) to make adjustments to how rooms are coded in CUNYfirst.

[← BACK TO ALL ROOMS](#)

Room Profile

- ⚙️ Settings
- 📅 Courses
- 📁 Exams
- 📆 Calendar
- 🚫 Blocked Out Times


Room A - 17 Lex 911

Display Name	Room Name
BAR01 - A-911	A - 17 Lex 911
Room Number	Building
A-911	Lawrence & Eris Field Building
Status	Room Type
Active	Assembly
Room Capacity	Departments
74	—
Room Features	
Academic Scheduling Theatre	
Effective Start Date	Effective End Date
May 29, 2012	
Exclude From Optimizer	Online Space
No	No
Allowed Sections	
<input type="text" value="Allow All"/>	

Additional filters can be added for an optimizer run at the bottom of the **“General Settings”** page. A filter can be added using any field in the section template.

1. To add a filter click the **“+add field”** button,
 - a. Select the field upon which you wish to filter

- i. Users can filter by any field associated with sections in the section editor
- b. Determine logic of the filter (e.g. Contains, Is, Is not, Is greater than, etc.)
- c. Then use the text box to enter a value: (i.e. Main)

 **Filters**

The following filters can be used to select a subset of sections that should be optimized.

✕ Where

Campus ▾

Is ▾

Main|

+ ADD FIELD

Note: In order for the filter to work properly, ensure that the value you are entering in the text field is correct (**correct capitalization is required** i.e. 'Main'). Also note that some fields will have a dropdown option.

The only fields that do not require text entry are “room” and “session” which instead prompt you to select from a dropdown menu.

The “contains” field has a collection of terms that are defined in their function in the table below:

Term	Definition
Does not Contain	If this value is present in the section field being searched for, the section is omitted from the optimizer run
Is	If this value is the value in the section field being searched for, it will be included in the optimizer run
Is not	If this value is the value in the section field being searched for, it will not be included in the optimizer run
Is not Empty	If the field in the section being searched for is not empty, it will be included in the optimizer run
Empty	If this field in the section is empty, it will be included in the optimizer run
Starts With	If this field in the section starts with the entered value, it will be included in the optimizer run

Ends With	If this field in the section ends with the entered value, it will be included in the optimizer run
Longer Than	If this field in the section is longer than the specified length, it will be included in the optimizer run
Shorter Than	If this field in the section is shorter than the specified length, it will be included in the optimizer run


Advanced Settings

Advanced settings are used to define/modify additional constraints and weights for the optimizer.

Please note that **any instructor related preference settings are not relevant to go-live**, though section level preferences are:

Priority Preferences Card	
Advanced Setting Name	Description
Standard Meeting Pattern Preferences	<p>Prioritize the room preferences of sections that use standard meeting patterns, as opposed to custom times.</p> <p>Ex. increasing these settings will give preferred rooms first to sections that use standard meeting times.</p>
Section Length Preference	<p>Prioritize the room preferences of sections that meet for an amount of time equal to or greater than the specified value.</p> <p>Ex. increasing these settings will give preferred rooms first to sections that align with the length requirement set here.</p>
Section Meeting Day Preference	<p>Prioritize the room preferences of sections that meet for a number of days per week equal to or greater than the specified value.</p>

	Ex. increasing these settings will give preferred rooms first to sections that meet at the threshold frequency set here.
Enrollment Preference	<p>Prioritize the room and time preferences of sections that have an enrollment equal to or greater than the specified value.</p> <p>Ex. increasing these settings will give preferred rooms first to sections that have an enrollment count at or above the set value.</p>

 **Priority Preferences**

Standard Meeting Pattern Preferences

Give preference to sections that using standard meeting patterns/times, opposed to custom times. Default value is no preference.

Section Length Preferences

Give preference to sections that meet above above a specified length in minutes. If value is empty, no preference is given.

Section Meeting Day Preferences

Give preference to sections that meet above a specified number of days per week. If value is empty, no preference is given.

Enrollment Preference

Give preference to sections that have a max enrollment greater than the specified number. If value is empty, no preference is given.

Priority Preferences

The priority preferences card has a collection of fields that allow for the optimizer to prioritize certain sections as defined in this card when making assignments. For example, if sections following standard meeting patterns, as opposed to custom meeting patterns, should be prioritized as a means of incentivizing the use of standard meeting patterns, then this field should be toggled to 'Yes.' Similarly, if there are certain section lengths, meeting days, or enrollment capacities that should be prioritized, this can be indicated here.

Weights Card	
Advanced Setting Name	Description
Preferred Times Weight	The weight of satisfying any preferred time preferences that have been provided by

	instructors. (Time-related preferences, not in use for Phase II)
Preferred Meeting Length	The weight of satisfying any preferred meeting length preferences that have been provided by instructors. (Time-related preferences, not in use for Phase II)
Conflict Times Weight	The weight of satisfying any conflict time preferences that have been provided by instructors. (Time-related preferences, not in use for Phase II)
Back to Back Sections Weight	The weight of satisfying any Back-To-Back-Sections preference that have been provided by instructors. (Instructor Preferences, not in use for Phase II).
Time Interval Between Sections Weight	The weight for satisfying any Time-Interval-Between-Sections preferences that have been provided by instructors. (Instructor Preferences, not in use for Phase II).
Preferred Room Weight	The weight for satisfying any preferred room preferences provided by instructors or set on specific sections. (Note that this is not relevant for Phase II).
Preferred Room Type Weight	The weight for satisfying any preferred room type preferences provided by instructors or set on specific sections. (Note that this is not relevant for Phase II).
Preferred Room Features Weight	The weight for satisfying any preferred room features preferences provided by instructors or set on specific sections.

Preferred Room Capacity Weight	The weight for satisfying any preferred room capacity preferences provided by instructors or set on specific sections.
Preferred Building Weight	The weight for satisfying any preferred building preferences provided by instructors or set on specific sections.
Linked Sections Weight	The weight for abiding to any linked section relationships. Note that the Linked Sections weight is used to determine how important it is to satisfy linked section relationships (also known as combined sections in Peoplesoft). If combined sections must have the same room, then set this weight to 10 (which sets it as a hard constraint).
Department Rooms Weight	The weight for prioritizing department-owned rooms when assigning rooms to sections.

Weights

- Preferred Times Weight 5 Weight for the preferred times preference.
- Conflict Times Weight 5 Weight for the conflict times preference.
- Preferred Meeting Length Weight 5 Weight for the preferred meeting length preference.
- Back To Back Sections Weight 5 Weight for instructor back to back preferences.
- Time Interval Between Sections Weight 5 Weight for time between sections preference.
- Preferred Room Weight 5 Weight for the preferred room preference.
- Preferred Room Type Weight 5 Weight for the preferred room type preference.
- Preferred Building Weight 5 Weight for the preferred building preference.
- Preferred Room Features Weight 5 Weight for the preferred room features preference.
- Preferred Room Capacity Weight 5 Weight for preferred room capacity preference.
- Department Rooms Weight 5 How important it is to schedule sections in department-owned rooms.
- Section Relationships Weight 5 Weight for sections in a Time and/or Room Relationship.

If there are no room preferences in the system, we suggest turning the following weights to zero:

1. Preferred Room Weight
2. Preferred Room Type
3. Preferred Room Features
4. Preferred Room Capacity
5. Preferred Building

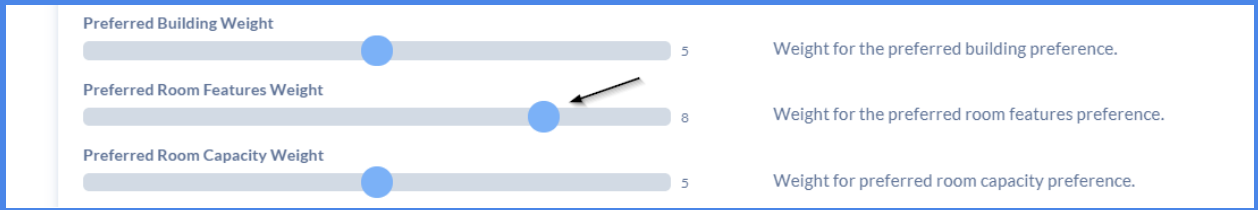
Note: *The weights range from 0-10.*

- A **value of 0** indicates the preference should have **no relevance** on the output of the optimizer, and resultantly can be ignored.
- A **value of 10** indicates a **hard constraint**, meaning that the **optimizer has to satisfy that preference** otherwise no room and assignments will be made.

Effectively, adding weight to any of the above settings will tell the optimizer to prioritize meeting those requirements, and removing weight will have the inverse effect.

Example of using Weights in Advanced Settings

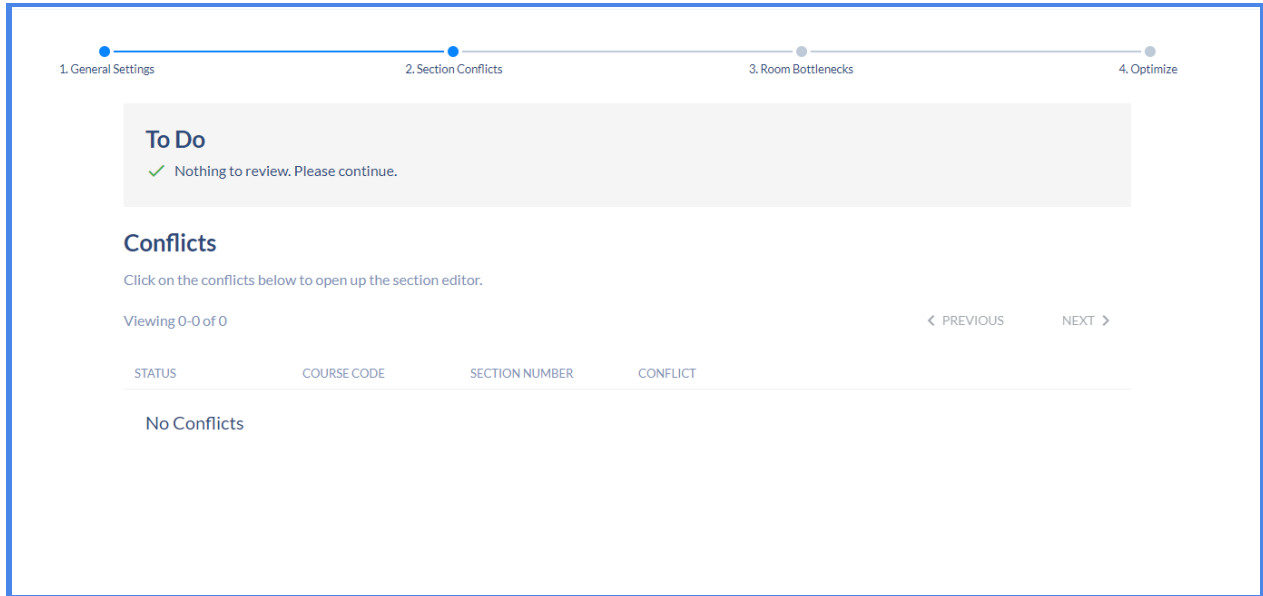
For example, all my Anthropology Courses have a preferred room feature of 'Smart Room', if I set the weight higher for 'Preferred Room Features,' I am telling the system to prioritize assigning Anthropology class sections to facilities that have the room feature of 'Smart Room.'



Preferred Building Weight	5	Weight for the preferred building preference.
Preferred Room Features Weight	8	Weight for the preferred room features preference.
Preferred Room Capacity Weight	5	Weight for preferred room capacity preference.

Section Conflicts

After **General Settings/Advanced Settings** is complete, next is “**Section Conflicts**,” this lists all conflicts in the current academic schedule that relate to optimization.



The following conflict types are related to Optimization and can potentially be flagged in the ‘Conflicts’ screen of the Optimizer Run:

Conflict Type	Description
Section With No Max Enrollment Capacity	This conflict affects the room optimizer because the enrollment capacity is used to determine if a section - room assignment violates the minimum seat utilization setting. Sections with no enrollment capacity will not be assigned rooms.

<p>Sections With Double Booked Rooms</p>	<p>The optimizer treats double booking rooms as a hard constraint - in other words, it will never double book a room. As a result, if sections provided to the optimizer have a pre-existing room double booking, the optimizer will not be able to successfully make any room assignments, and will likely fail. To resolve this, please assign all sections with room double bookings a 'Same Time, Same Day, Same Room' relationship, which informs the optimizer that the double bookings are allowed and intended.</p>
<p>Sections With Double Booked Instructors</p>	<p>This conflict is similar to the Double Booked Rooms conflict, except only applies when running the time optimizer. The time optimizer will not assign meeting times to a section that results in a double-booked instructor, and this is treated as a hard constraint. If any sections come into the optimizer with pre-assigned times and a double-booked instructor conflict, the Same Time & Same Day relationship must be assigned to those sections to inform the optimizer that the conflicts should be ignored. Note that because the time optimizer is not going to be run this is not relevant.</p>

Note: All classes, including cancelled ones, show up as conflicts, unless settings have been configured to exclude these classes. If cancelled classes are showing up as conflicts and you do not believe this should be the case, please reach out to your CUNY Central contact (Office of the University Registrar).


Additionally, **even if the optimizer is to be used for a singular department, the optimizer will take into account all of the scheduled courses.** All conflicts (regardless of department) will be displayed as the existence of those conflicts will impact optimizer performance. For example, the optimizer in the image below is being used for the Math department, but conflicts in the computer science section are being displayed:

Conflicts		
Viewing 1-7 of 7		< PREVIOUS NEXT >
COURSE CODE	SECTION NUMBER	CONFLICT
CIS1200	01	There are no times associated with this section.
CP2100	01	There are no times associated with this section.
CP500	01	There are no times associated with this section.
CS1200	01	There are no times associated with this section.
MAT2200	01	There are no times associated with this section.
MAT4A0	01	There are no times associated with this section.
MATR300	01	There are no times associated with this section.

Room Bottleneck

The second page lists all potential room bottlenecks that have been calculated in the current academic schedule, an example shown below:


To Do

 There are 2 sections that have a potential room bottleneck. We strongly suggest resolving these bottlenecks before running the optimizer.

Potential Room Bottlenecks

Click on the bottleneck to open up the section editor.

Viewing 0-2 of 2 « PREVIOUS NEXT »

STATUS	COURSE CODE	SECTION NUMBER	BOTTLENECKS
 Warning	MATH001	004	This section is meeting at a time when 1 other section requires a room of capacity 100 or greater. However, there is only 1 room with the required capacity available at this time.

There are two types of room bottlenecks that could be detected:

Bottleneck Type	Description
No room with the required capacity	This is detected when a section has an enrollment capacity greater than the capacity of any room in the system
Not enough rooms with the required capacity	This is detected when a section requires a room with a minimum capacity, but multiple other sections require that same room at the same time.

***Note:** You do not need to delete your current optimizer run to clear the list of issues on the Room Bottlenecks screen. Bottlenecks can be resolved within the optimizer run by selecting the bottleneck, or in the section editor. They may not show that they are resolved in your optimizer run until you refresh the page.*

Running The Optimizer

Once all conflicts/bottlenecks have been resolved, you may proceed to the “**Run Optimizer**” page:

Run The Optimizer

Click optimize to create your perfect schedule. Once the optimizer has completed, you will be granted access to the Optimizer Results dashboard, which shows the newly built schedule along with many pre-built reports.

OPTIMIZE !

Click the “**Optimize!**” button and the optimizer will start immediately. You will be shown a progress bar to check in on the progress of the run:

Run The Optimizer

Click optimize to create your perfect schedule. Once the optimizer has completed, you will be granted access to the Optimizer Results dashboard, which shows the newly built schedule along with many pre-built reports.

OPTIMIZING...

● Optimizing...

Estimated Time Remaining: 30min

Note: *The optimizer creates a copy of the section data that can be found in the Section Editor. As a result, running the optimizer will not impact the existing schedule, and the optimizer can be run multiple times until the desired result is reached. Once you have completed an optimizer run with a satisfactory result, you can merge the results back into your existing schedule (see below for details on merging).*

If a run fails, review the run's settings (i.e., section filters and weights) and create a new optimizer run to re-try. *More often than not, this is user error as a result of infeasible constraints arising from the run's settings. Once the run is completed, the progress bar will reach 100% and you will be redirected to the Optimizer Results dashboard. Runs that fail cannot be rerun, and instead a new run must be created.*

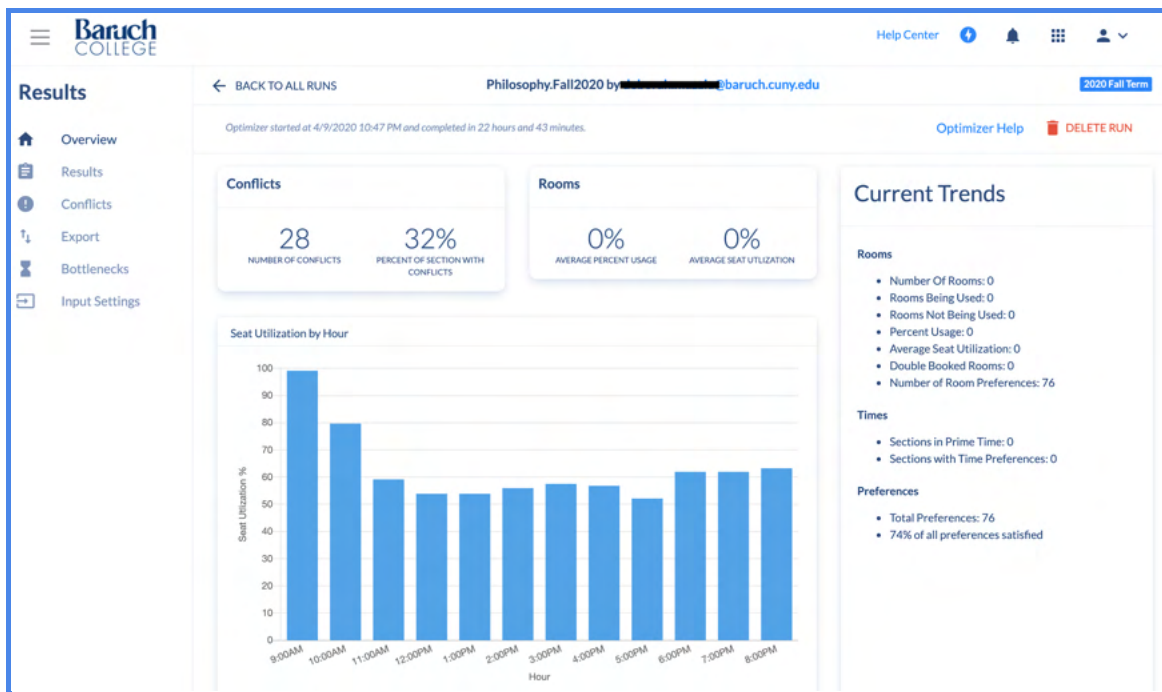
It is recommended setting the Email notifications to Yes in the General Settings card to alert you when the Optimizer run is completed.

Optimizer Results Dashboard

Once the Optimizer Run status is complete, click on the run to view your results.



The Optimizer results dashboard is used to view the result of optimizer assignments, view reports, and conflicts, and merge the results back into your current schedule. The top of the dashboard will indicate which user ran the optimizer:



The dashboard consists of the following pages:

Page Name	Description
Overview	This tab shows optimizer-related reports, displaying Conflicts, Rooms and Current Trends. This also includes information on the Seat Utilization by the Hour including Hourly and Daily Schedule Distribution.

Results	This tab lists all sections provided to the optimizer and their time/room assignments
Conflicts	This tab lists all conflicts that exist in the optimizer output
Export	This tab allows you to download CSV reports for the optimizer output: <ul style="list-style-type: none"> • Course Sections List • Room Bottleneck List • Optimizer Assignments
Bottlenecks	This tab lists all room bottlenecks that exist in the optimizer output
Input Settings	This tab allows you to view the input settings that were defined before the optimizer run

Viewing Results

The “Results” tab lists all the sections contained in the optimizer run in a view similar to the “Section Editor.” You can view the results by individual sections or grouped together in courses. Note that all results are view only. If you want to make any individual changes we recommend merging the optimizer run with the schedule, and then making any necessary changes within the Section Editor. You can filter between:

1. All sections scheduled successfully by the optimizer
2. All sections not scheduled by the optimizer
3. All sections scheduled but have preference conflicts
4. All sections excluded from the optimizer
 - a. Note that these can be ignored when viewing optimizer results, so long as they are marked as excluded.

Fall 2020 All Departments

✓ Scheduled Successfully
 ⚠ Scheduled With Preference Conflicts
 - Not Scheduled
 📄 Excluded

FILTER CHANGE VIEW Search for courses

Viewing 0-4 of 4 « PREVIOUS NEXT »

[VIEW BY COURSES](#)
[VIEW ANOTHER TERM](#)

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
✓ BIO100 002	Not set	Mo and We	11:15 AM	12:00 PM	Golf Course
✓ BIO100 001	Jake Johnson	Mo and We	10:00 AM	10:30 AM	Bitterroot College 104
✓ CS101 001	Not set	Mo and We	10:00 AM	10:30 AM	Golf Course
✓ BIO200 001	Jake Johnson	Mo and We	10:45 AM	11:00 AM	Bitterroot College 104

[Help](#)

Next to each section, there will be an icon indicating one of the following four statuses:

1. Checkbox - Optimizer successfully made all room assignments
2. Warning - Optimizer made a room assignment, however, the assignment violates some soft constraints due to preferences.
3. Not Scheduled - Optimizer was not able to assign a room. The likely cause of this issue is if either;
 - a. The input schedule contained a Double-Booked Room Conflict
 - b. Or there was a room bottleneck issue that prevented the optimizer from assigning all sections to a room that would not violate the minimum seat utilization.
4. Excluded - Sections that exist in the relevant scheduling term but were excluded from having rooms assigned by the optimizer. For example, canceled sections.

Conflicts

All conflict and preference violations that exist in the schedule are displayed here. Users can filter by conflict type to get a more granular view of the existing conflicts.

Results

- [Overview](#)
- [Results](#)
- [Conflicts](#)
- [Export](#)
- [Bottlenecks](#)
- [Input Settings](#)

Optimizer Schedule Conflicts

All conflicts and preference violations that exist in the schedule will be shown below. Pre-existing conflicts for sections that were excluded from the optimizer are visible along with any preference conflicts that might have resulted from optimizer assignments.

Conflicts

2
TOTAL CONFLICTS

22.2%
PERCENT SECTIONS WITH CONFLICTS

Preferences

2
PREFERENCE CONFLICTS

50.0%
PERCENT PREFERENCES SATISFIED

Filter by conflict type ▼

Exports

If you would like to export your results, there are three options:

1. **Course Sections List Report** - This report creates a CSV that is a direct copy of the Course Sections List in the Reporting Dashboard, however, includes data for optimizer assignments. This will include all optimizer room assignments, but will also include many other section fields, and will include sections that the optimizer was not able to make assignments for.
2. **Room Bottleneck Lists** - This report lists all room bottlenecks that are still present in the optimizer output results.
3. **Optimizer Assignments** - This report only lists sections that the optimizer made assignments to, and only includes information on Course Code, Section Number, Times, and Rooms.

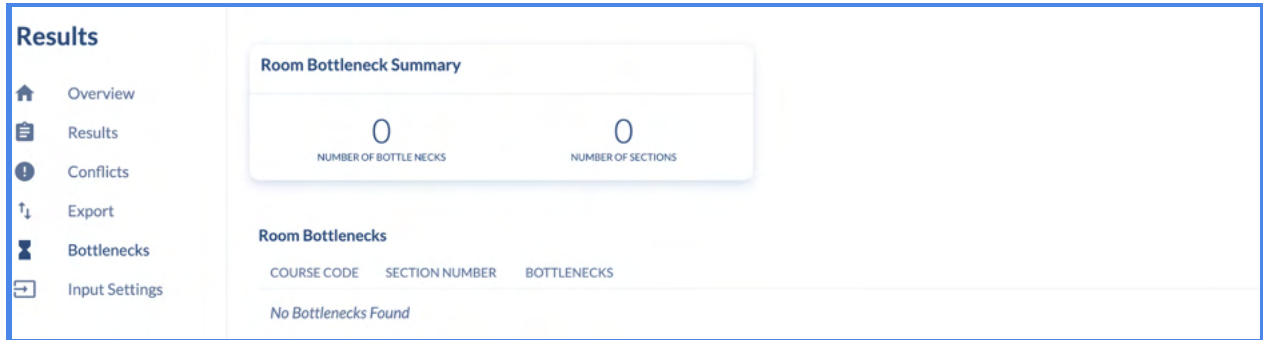
Results

- [Overview](#)
- [Results](#)
- [Conflicts](#)
- [Export](#)
- [Bottlenecks](#)

NAME	DESCRIPTION	DOWNLOAD
Course Sections List	This report is a CSV file that lists all course sections that were contained within the optimizer run, including time and room assignments made by the optimizer.	DOWNLOAD
Room Bottleneck List	This report is a CSV file that lists all room bottlenecks detected in the optimizer output.	DOWNLOAD
Optimizer Assignments	This report is a CSV file that lists all time and room assignments made by the optimizer.	DOWNLOAD

Bottlenecks

This view displays room bottlenecks present in the system. If these were all resolved prior to the optimizer run, there should be no room bottlenecks detected.



Results

- Overview
- Results
- Conflicts
- Export
- Bottlenecks
- Input Settings

Room Bottleneck Summary

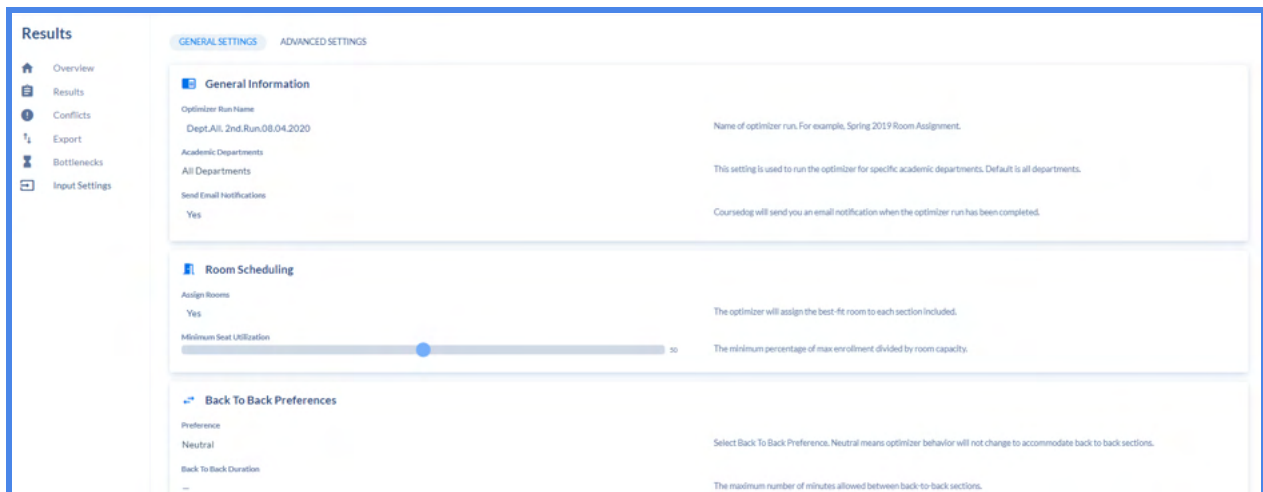
0	0
NUMBER OF BOTTLE NECKS	NUMBER OF SECTIONS

Room Bottlenecks

COURSE C.CODE	SECTION NUMBER	BOTTLENECKS
No Bottlenecks Found		

Input Settings

Input settings review the settings that were configured for the specific optimizer run in review so users can track the settings leveraged for each run, and iterate on these settings for future runs in order to compare outputs.



Results

- Overview
- Results
- Conflicts
- Export
- Bottlenecks
- Input Settings

GENERAL SETTINGS ADVANCED SETTINGS

General Information

Optimizer Run Name: Dept_All_2nd_Rm_08.04.2020 Name of optimizer run. For example, Spring 2019 Room Assignment.

Academic Departments: All Departments This setting is used to run the optimizer for specific academic departments. Default is all departments.

Send Email Notifications: Yes Coursedog will send you an email notification when the optimizer run has been completed.

Room Scheduling

Assign Rooms: Yes The optimizer will assign the best-fit room to each section included.

Minimum Seat Utilization: 50 The minimum percentage of max enrollment divided by room capacity.

Back To Back Preferences

Preference: Neutral Select Back To Back Preference. Neutral means optimizer behavior will not change to accommodate back to back sections.

Back To Back Duration: The maximum number of minutes allowed between back-to-back sections.

Merging Results

When you are merging results, you have two choices

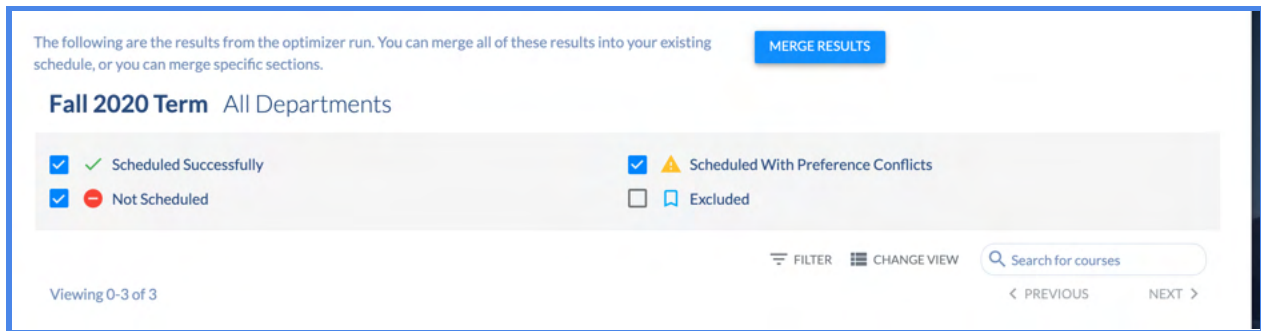
1. **Bulk Merge** - Merge results for all sections at once

2. **Single Merge** - Merge results for a single section

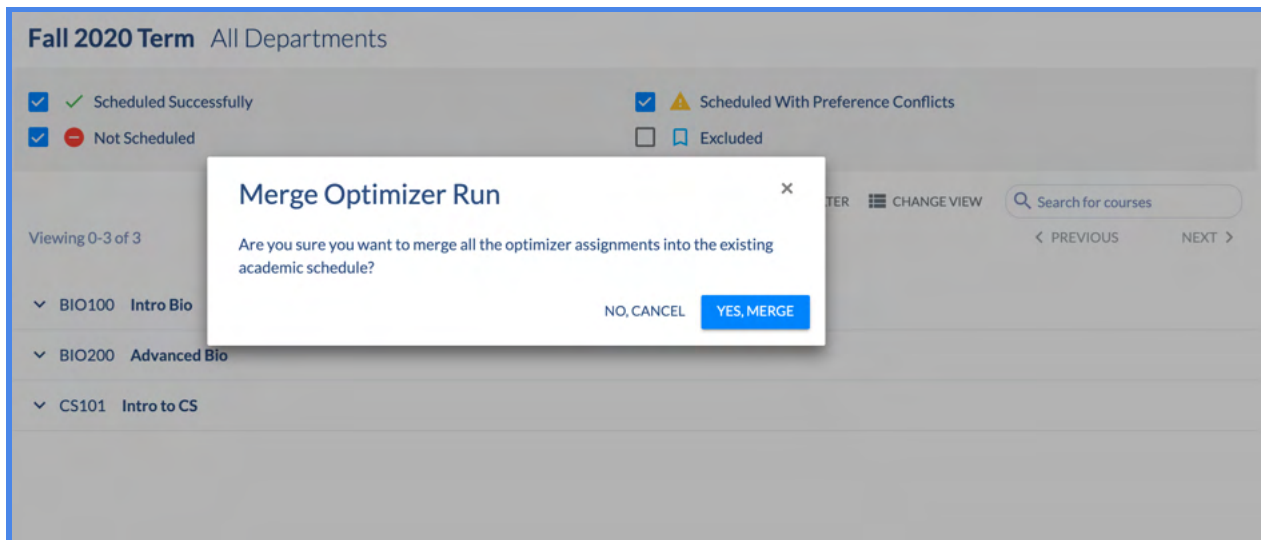
Bulk Merge

A **Bulk Merge** can be accomplished by;

- 1) Clicking the "**Merge Results**" button on the top right of the "*Results*" page:



- 2) Clicking that button will open up a confirm modal to ensure you want to perform this action.



Single Merge

A **Single Merge** for an individual section(s) can be performed by;

- 1) Clicking on the "**Merge Section**" button in the section row, on the left:

BIO100 Intro Bio						
Course Description						
There is currently no course description for this course.						COURSE INFO
INSTRUCTORS	DAYS	START	END	ROOM		
Jake Johnson	Mo and We	10:00 AM	10:30 AM	Bitterroot College 104		

Note: Currently, optimizer merges don't trigger the real time integration as it is a bulk action that merges optimizer data into schedule data in Coursedog, but not in Peoplesoft. The results of optimizer mergers should sync nightly in the SIS. The nightly sync takes place between 2:00 a.m. and 3:00 a.m. EST.

Exam Scheduling

You can manually schedule exams on a class-by-class basis or use the Exam Optimizer. The Exam Optimizer scheduling process is a useful method to schedule exams in the same facility as the primary meeting for the class or use custom rules to set parameters if you want certain sections to be in another room.

Manually Schedule an Exam

1. To Manually Assign an Exam Schedule to a Section, select the **'Section Editor'** tab in the home menu and open up the section you would like to schedule an exam for.

Scheduling Management

Home
Requests
Section Editor
Preference Forms
Reports
Relationships
Rooms
Buildings
Rollovers
Optimizer
Rules
Settings

Fall 2021 Term Available 2/1/2021 | Schedule Due for Review 3/1/2021 | Schedule available for Student View 3/15/2021 | Departmental Registration Begins 4/5/2021 | Student Self-Service Registration Begins 4/12/2021 | Scheduling Testing for Fall 2021 5/18/2021

Departmental Status (2021 Fall Term)

Search for departments

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	VALIDATION	SUBMISSION
Aaron Copland School of Music	Sheila Stern and Danielle Lord	149	486	509		In Progress
Accounting & Information Systems	Sheila Stern and Danielle Lord	33	114	122		In Progress
Africana Studies	Sheila Stern and Danielle Lord	6	9	9		Submitted
American Studies	Sheila Stern and Danielle Lord	0	0	0		Not Started
Anthropology	Sheila Stern and Danielle Lord	23	49	62		In Progress
Art	Sheila Stern and Danielle Lord	116	285	444		In Progress
Biology	Sheila Stern and Danielle Lord	40	122	103		In Progress
Business and Liberal Arts	Sheila Stern, Danielle Lord and 1 other	13	27	13		In Progress
Byzantine & Mod Greek Studies	Sheila Stern and Danielle Lord	1	1	1		In Progress
Chemistry and Biochemistry	Sheila Stern and Danielle Lord	52	115	115		In Progress
Classical, Middle East & Asian Languages	Sheila Stern and Danielle Lord	50	73	94		In Progress
Comparative Literature	Sheila Stern and Danielle Lord	10	29	35		In Progress
Computer Science	Sheila Stern and Danielle Lord	40	180	208		Submitted
Drama, Theatre and Dance	Sheila Stern, Danielle Lord and 1 other	30	54	50		In Progress
Economics	Sheila Stern and Danielle Lord	47	118	45		In Progress
Educational and Community Programs	Sheila Stern and Danielle Lord	66	156	159		In Progress

- Once the Section is opened, scroll down until you have reached the *Exam Meetings* card and select **'+Exam Meeting'**.

Notes List
+ SECTION NOTE

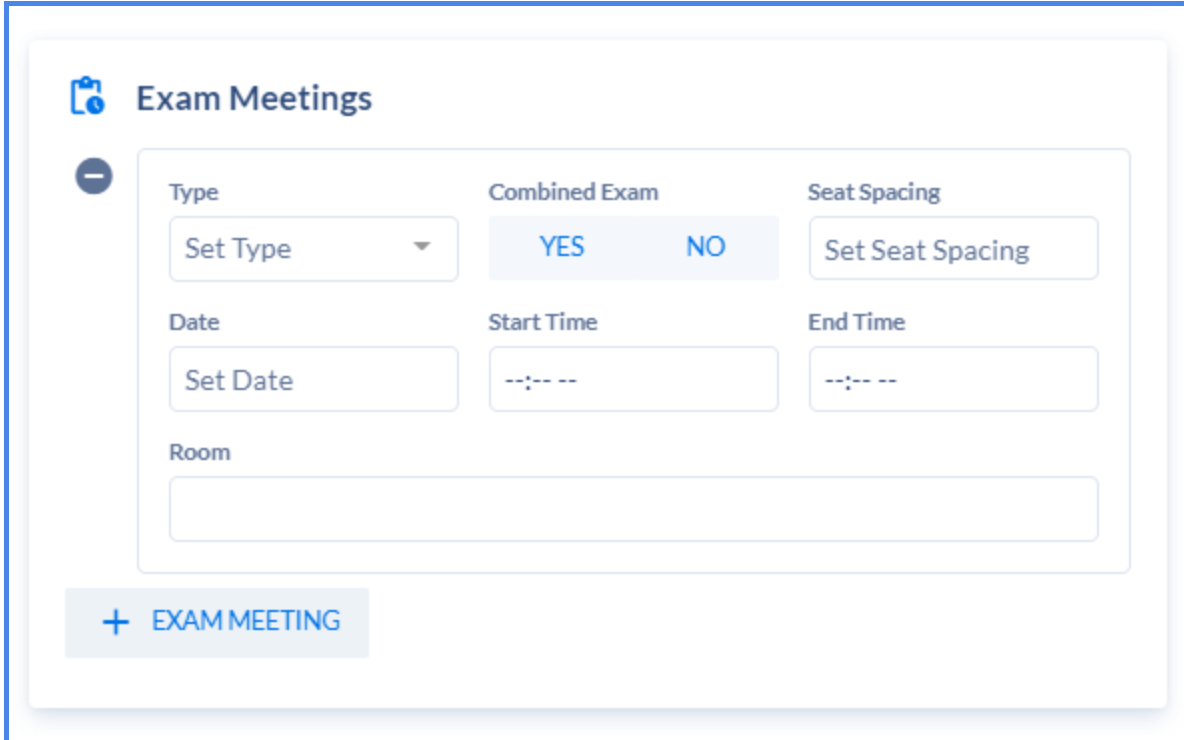
Reserve Capacity
+ RESERVE CAPACITY

Course Materials
+ COURSE MATERIAL

Exam Meetings
+ EXAM MEETING

CANCEL ADD SECTION

Comments can be saved once this section is added.



3. Once the card is opened, certain fields will appear. List of the fields are provided below with their functionality:
 - a. **Type** - There are two options you can select from:
 - i. Final
 - ii. Makeup
 - b. **Combined Exam** - If there are more than one section taking the same exam.
 - c. **Seat Spacing** - The number of seats apart each student must be from each other during the Exam
 - d. **Date** - Schedule the Date for the Exam for this Section
 - e. **Start/End Time** - Select the times for the Exam for this Section
 - f. **Room** - Select the room for the Exam for this Section

Note: If the Seat Spacing option is 1 or greater, this directly affects what room can be used for the Exam. (i.e If the user inputs the Seat Spacing as 1 in a section that has an Enrollment total of 20, the room has to have a Maximum Room Capacity of 40 or greater to accommodate for the Seat Spacing).

Exam Meeting Pattern for Exam Optimizer

Exam meeting patterns are used to define what time and date combinations are allowed for exams. These settings are used in the Exam Optimizer by determining which times are best associated with specific meeting patterns.

In order to reach the Exam Meeting Pattern page:

1. Select **'Settings'** in the dashboard and click on **'Meeting Patterns'**

Department	Meeting Pattern	Count 1	Count 2	Count 3
Africana Studies	Sheila Stern and Danielle Lord	6	9	9
American Studies	Sheila Stern and Danielle Lord	0	0	0
Anthropology	Sheila Stern and Danielle Lord	23	49	62
Art	Sheila Stern and Danielle Lord	116	285	444
Biology	Sheila Stern and Danielle Lord	40	122	103
Business and Liberal Arts	Sheila Stern, Danielle Lord and 1 other	13	27	13
Byzantine & Mod Greek Studies	Sheila Stern and Danielle Lord	1	1	1
Chemistry and Biochemistry	Sheila Stern and Danielle Lord	52	115	115
Classical, Middle East & Asian Languages	Sheila Stern and Danielle Lord	50	73	94
Comparative Literature	Sheila Stern and Danielle Lord	10	29	35
Computer Science	Sheila Stern and Danielle Lord	40	180	208
Drama, Theatre and Dance	Sheila Stern, Danielle Lord and 1 other	30	54	50
Economics	Sheila Stern and Danielle Lord	47	118	44
Educational and Community Programs	Sheila Stern and Danielle Lord	66	156	159
Elementary and Early Childhood Education	Sheila Stern and Danielle Lord	36	122	122

2. The first page will show your standard meeting patterns, on the top of the page select **'Exam Meeting Patterns'** and click on **'+ Add Exam Meeting Pattern'**.

DATE	START TIME	END TIME	ASSOCIATED MEETING PATTERNS	ROOM MAPPINGS
Exam Date Period Num 6	8:30 AM	10:30 AM	4 Meeting Patterns	Using Same Room
Exam Date Period Num 6	11:00 AM	1:00 PM	3 Meeting Patterns	Using Same Room
Exam Date Period Num 6	1:45 PM	3:45 PM	3 Meeting Patterns	Using Same Room
Exam Date Period Num 6	3:30 PM	4:40 PM	1 Meeting Pattern	Using Same Room
Exam Date Period Num 7	8:30 AM	10:30 AM	4 Meeting Patterns	Using Same Room

3. Once selected, a window will appear with multiple options described below.
 - a. **Date** - The date of the exam
 - b. **Start Time** - Start time of the exam
 - c. **End time** - End time of the exam
 - d. **Associated Standard Meeting Patterns** - The list of standard meeting patterns map to this exam meeting pattern. **This mapping is used by the exam optimizer**
 - i. If a section meets during the academic calendar on Mon, Wed, from 10AM - 12:30PM, then the optimizer will assign it to an exam on the specified date, from 7AM - 8AM.
 - e. **Exam Room Mappings** - This field defines what rooms the optimizer should assign to the exam meeting pattern. There are two ways to define this mapping
 - Option 1 - Indicate the exam will be in the same room as the Academic meetings. This is the default setting if no specific mappings are set up.
 - Option 2 - Indicate a specific mapping, i.e. if the academic meeting is in Room 1, then the exam should be in Room 2

Example of Option 1:

Add Exam Meeting Pattern ×

Use Exam Date Period

Exam Period Date Number ?	Start Time	End Time
<input type="text" value="2"/>	<input type="text" value="08:30 AM"/>	<input type="text" value="10:00 AM"/>

Associated Standard Meeting Patterns

On Mon,Wed from 7:45 AM to 9:00 AM - MW3,MW3A
×

Exam Room Mappings

Exam will be in same room as section

+ CUSTOM RULES

ADD

Example of Option 2:

Add Exam Meeting Pattern ✕

Use Exam Date Period

Exam Period Date Number ? Start Time End Time

Associated Standard Meeting Patterns

Exam Room Mappings

If the section's academic meeting is in one of the following rooms:

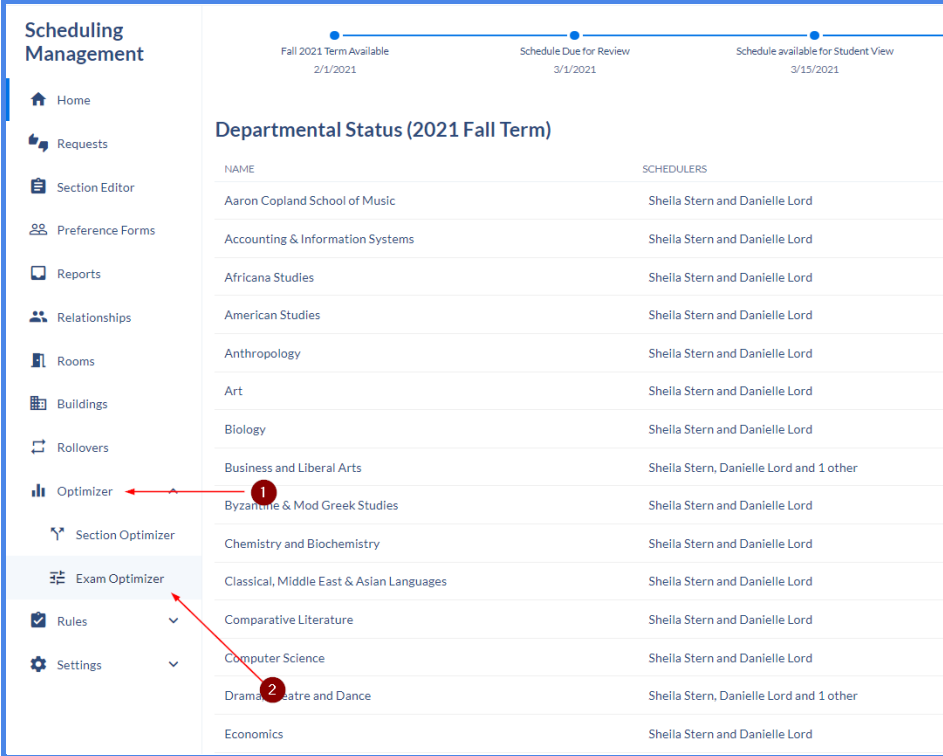
The section's exam meeting should be in the following rooms:

Else the section's exam room should be in the same room ✕

Exam Optimizer

To mass update the Exam Schedule to Sections that have a Standard Meeting Pattern:

1. In the Home Page, Select '**Optimizer**' and then select '**Exam Optimizer**'.



Scheduling Management

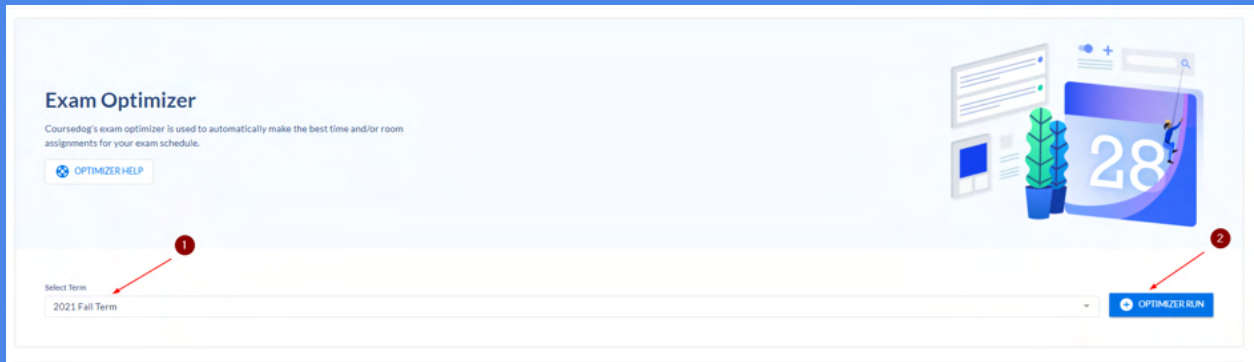
Home | Requests | Section Editor | Preference Forms | Reports | Relationships | Rooms | Buildings | Rollovers | **Optimizer** | Section Optimizer | **Exam Optimizer** | Rules | Settings

Fall 2021 Term Available: 2/1/2021 | Schedule Due for Review: 3/1/2021 | Schedule available for Student View: 3/15/2021

Departmental Status (2021 Fall Term)

NAME	SCHEDULERS
Aaron Copland School of Music	Sheila Stern and Danielle Lord
Accounting & Information Systems	Sheila Stern and Danielle Lord
Africana Studies	Sheila Stern and Danielle Lord
American Studies	Sheila Stern and Danielle Lord
Anthropology	Sheila Stern and Danielle Lord
Art	Sheila Stern and Danielle Lord
Biology	Sheila Stern and Danielle Lord
Business and Liberal Arts	Sheila Stern, Danielle Lord and 1 other
Byzantine & Mod Greek Studies	Sheila Stern and Danielle Lord
Chemistry and Biochemistry	Sheila Stern and Danielle Lord
Classical, Middle East & Asian Languages	Sheila Stern and Danielle Lord
Comparative Literature	Sheila Stern and Danielle Lord
Computer Science	Sheila Stern and Danielle Lord
Drama, Theatre and Dance	Sheila Stern, Danielle Lord and 1 other
Economics	Sheila Stern and Danielle Lord

2. Once the Exam Optimizer page opens, select the term the optimizer would run for and click on '+Optimizer Run'.



Exam Optimizer

Coursedog's exam optimizer is used to automatically make the best time and/or room assignments for your exam schedule.

[OPTIMIZER HELP](#)

Select Term: 2021 Fall Term

OPTIMIZER RUN

General Settings

3. There are multiple fields to plug in that's provided below:

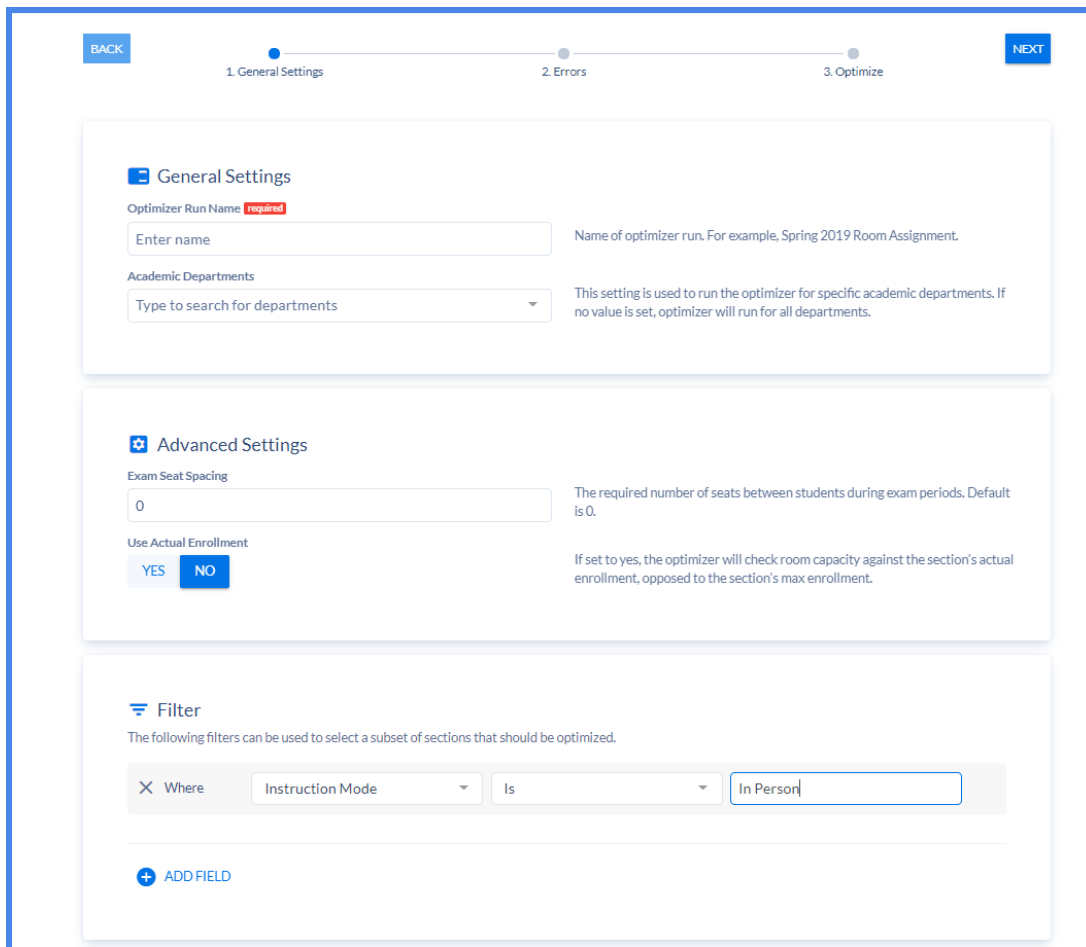
a. General Settings

- i. *Optimizer Run Name* - Name of the optimizer run
- ii. *Academic Departments* - Users are able to select the departments they want the optimizer to run for. If left blank, the optimizer will assign for every department.

b. Advanced Settings

- i. *Exam Seat Spacing* - Select the number of seats between students during the exam.
- ii. *Use Actual Enrollment* - If set to yes, the optimizer will check room capacity against the section's actual enrollment, opposed to the section's max enrollment.

c. Filter - Use this feature to closely specify what the Exam Optimizer should Schedule Exams for. (i.e Where Instruction mode is In Person)



The screenshot shows a web interface for configuring an exam optimizer. At the top, there are navigation buttons for 'BACK' and 'NEXT', and a progress indicator with three steps: '1. General Settings', '2. Errors', and '3. Optimize'. The 'General Settings' section contains:

- Optimizer Run Name** (required): A text input field with a placeholder 'Enter name' and a description: 'Name of optimizer run. For example, Spring 2019 Room Assignment.'
- Academic Departments**: A dropdown menu with a placeholder 'Type to search for departments' and a description: 'This setting is used to run the optimizer for specific academic departments. If no value is set, optimizer will run for all departments.'

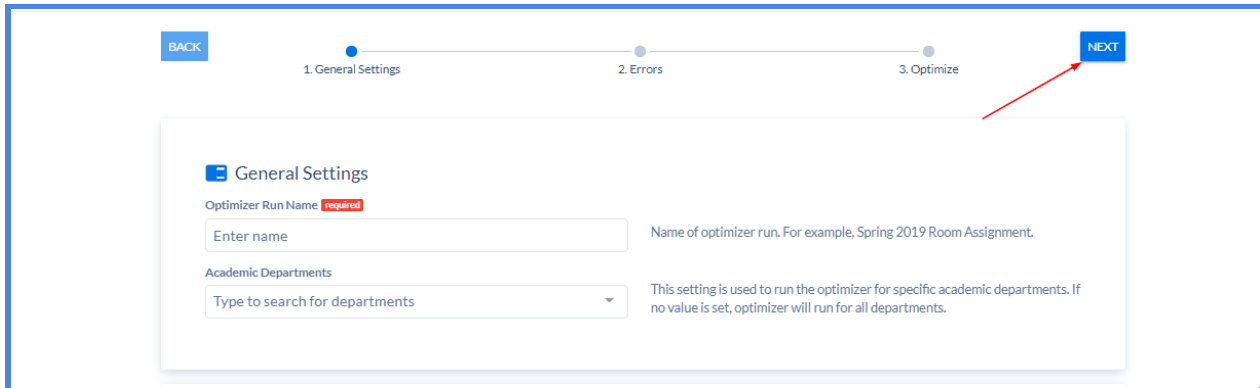
 The 'Advanced Settings' section contains:

- Exam Seat Spacing**: A text input field with the value '0' and a description: 'The required number of seats between students during exam periods. Default is 0.'
- Use Actual Enrollment**: A toggle switch with 'YES' and 'NO' options. The 'NO' option is selected. Description: 'If set to yes, the optimizer will check room capacity against the section's actual enrollment, opposed to the section's max enrollment.'

 The 'Filter' section contains:

- A heading 'Filter' and a sub-heading 'The following filters can be used to select a subset of sections that should be optimized.'
- A filter configuration bar: 'X Where' followed by a dropdown menu set to 'Instruction Mode', 'Is' followed by a dropdown menu set to 'In Person', and a text input field containing 'In Person'.
- An '+ ADD FIELD' button below the filter bar.

4. Once the fields are filled in, Select **'Next'** on the top right of the page.



The screenshot shows a web interface for configuring an optimizer. At the top, there is a progress bar with three steps: "1. General Settings", "2. Errors", and "3. Optimize". A "BACK" button is on the left, and a "NEXT" button is on the right. A red arrow points to the "NEXT" button. The "General Settings" section is active and contains two fields:

- Optimizer Run Name** (required): A text input field with the placeholder "Enter name". The description is "Name of optimizer run. For example, Spring 2019 Room Assignment."
- Academic Departments**: A dropdown menu with the placeholder "Type to search for departments". The description is "This setting is used to run the optimizer for specific academic departments. If no value is set, optimizer will run for all departments."

Optimizer Errors

Once all of the general settings fields have been completed, Coursedog will provide a table that contains a list of errors that would prevent the optimizer from completing successfully. These errors must be resolved before you run the optimizer.

Below are the list of Errors that may occur:

a. Exam Period does not have a date

This indicates the exam meeting pattern has an empty date field.

b. Exam Period start/end date not set on term

This indicates that the term and part of terms associated with the optimizer run are missing either the exam period start date or exam period end date property.

c. Missing term and/or part of term data

This indicates that either the term (or a part of term assigned to one of the sections) cannot be found or does not exist.

d. Exam occurs before the exam period starts

This indicates that an exam meeting pattern has a date field set to before the exam period.

e. Exam occurs after the exam period ends

This indicates that an exam meeting pattern has a date field set to after the exam period.

f. Section must have enrollment (or max enrollment) set

Based on the "Use Actual Enrollment" setting, the exam optimizer requires all sections to have either the enrollment or max enrollment field populated.

g. Exam Pattern end time is invalid

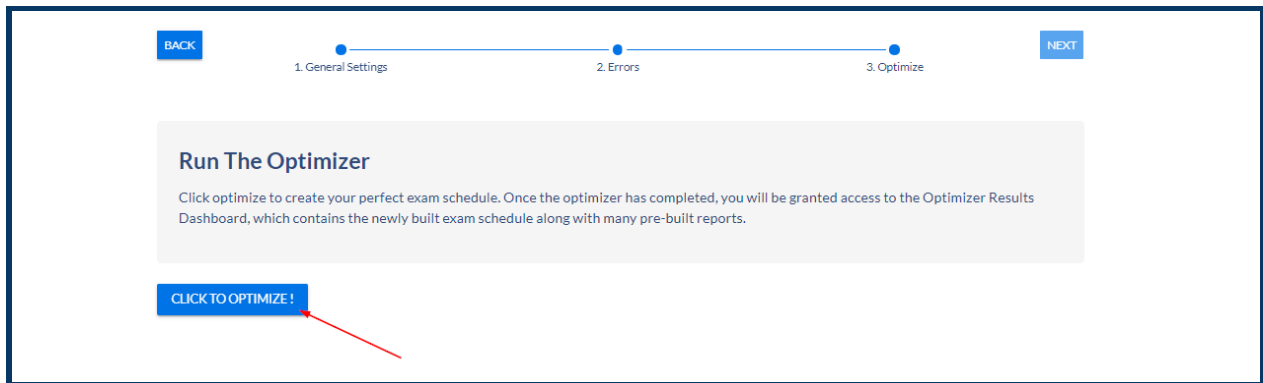
This indicates that an exam meeting pattern has an end time before the start time.

h. Exam Pattern: start/end time is required

This indicates that an exam meeting pattern has a missing start or end time property.

Optimize

1. Once all errors have been cleared (if any), the user can now select '**Click to Optimize**'.



***Note:** When waiting for the optimizer to generate the exam schedule, the loading time will say 119 min by default, however, please note that this is a generic number and the time varies depending on the amount of departments you are running the optimizer for.

Exam Optimizer Results

Results

Once the Optimizer runs successfully, it will take the user to the '*Exam Optimizer Results*' page. The Dashboard will contain the exam schedule for every section and will allow you to filter these sections based on the results of the optimizer.

Below are the filter options:

Scheduled Successfully - The sections that contain a checkmark are the sections that the optimizer was able to assign an exam schedule.

Scheduled With Issues - The sections that contain a yellow warning are the sections that were assigned an exam time scheduled, however did not have an academic room attached. This may occur if the user sets the Exam Meeting Pattern as *'use the same room as academic room'* but has no room attached to the section.

Not Scheduled - The sections that contain a red warning indicate that the exam meeting could not be scheduled.

Excluded - The sections that contain an outlined blue flag indicate that these sections have been excluded from the optimizer run.

Exam Optimizer Results

← BACK TO ALL RUNS ACCT [Department Name] 2021 Fall Term

Run started at 10/18/2021 3:11 PM and completed in 2 minutes

Results

The following are the results from the optimizer run. You can merge all of these results into your existing schedule. [MERGE ALL RESULTS](#)

Viewing 1-23 of 23

Scheduled Successfully Scheduled With Issues
 Not Scheduled Excluded

STATUS	SECTION	EXAM DATE	START TIME	END TIME	ROOM
✓	ACCT 101 - 01	2021-12-20	08:30 AM	10:30 AM	QNS01 - FG-312
✓	ACCT 101 - 11	2021-12-15	04:00 PM	06:00 PM	QNS01 - CD-134
✓	ACCT 102 - 03	2021-12-16	11:00 AM	01:00 PM	QNS01 - RE-100
✓	ACCT 102 - 04	2021-12-16	04:00 PM	06:00 PM	QNS01 - RE-100
✓	ACCT 201 - 03	2021-12-21	01:45 PM	03:45 PM	QNS01 - OL-01

Export

Users are able to download a CSV file of the exam schedule the optimizer was able to provide for the departments selected.

Exam Optimizer Results

← BACK TO ALL RUNS ACCT [Department Name] 2021 Fall Term

Run started at 10/18/2021 3:11 PM and completed in 2 minutes

Results

Export

NAME	DESCRIPTION	DOWNLOAD
Exam Optimizer Results	This report is a CSV file that lists the output of the exam optimizer.	DOWNLOAD

Once the user is satisfied with the schedule, the user can select **'Merge All Results'** to apply the exam schedule to the sections and can be viewed in the *'Section Editor'*.

Note: Once merged any edits must be done manually for a specific section.

Reviewing the Final Schedule

Auditing the Schedule in the Section Editor

After all of the change requests have been voted on, it's a good idea to do one final audit of the schedule.

1. To do this, navigate to the “*Section Editor*” tab on the left sidebar and select ‘Department’ in order to select the appropriate department. Then, click “**VALIDATE SCHEDULE**” on top of the screen:

2020 Fall Term Accountancy Department


Sections By Course + COURSE VALIDATE SCHEDULE SUBMIT SCHEDULE

2. This will display a list of all conflicts that exist in the schedule. Resolve any conflicts in the system, or confirm they are allowed:

Review Schedule Conflicts

As of 06/13/2020 9:32 PM

[SECTION RULES](#) [MEETING PATTERN RULES](#) [PREFERENCES](#)

 **Relationship Conflict (19)**

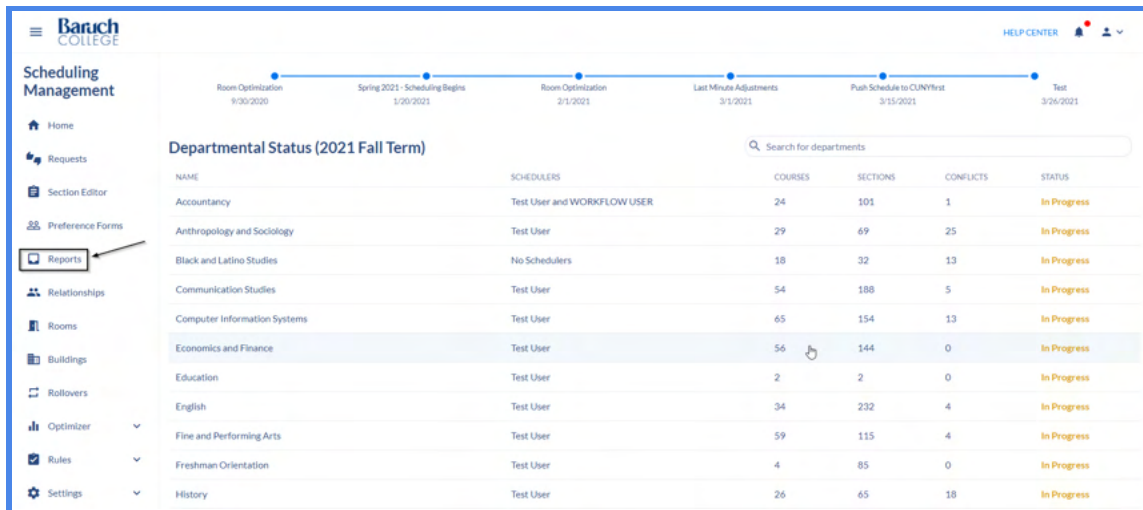
REL3100: Section CMWA — This section is violating the **Same Time Same Day Same Room relationship** it has with HIS3100 - CMWA and 2 other sections.

Reports

Viewing and Filtering Reports

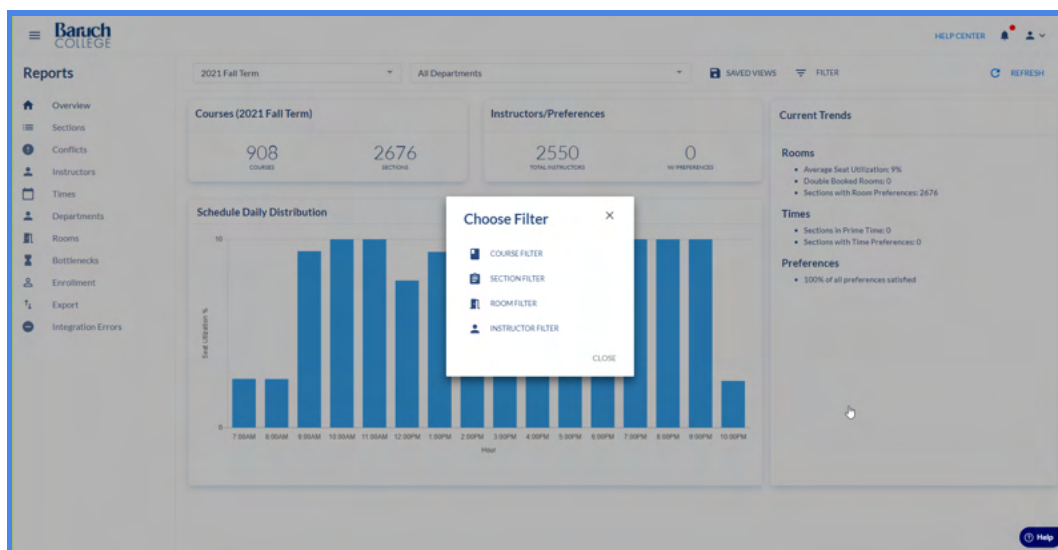
Coursedog offers a range of out-of-box reports to help analyze data in Class Schedule Planning.

1. To view them, navigate to the reports tab on the left side of the screen:



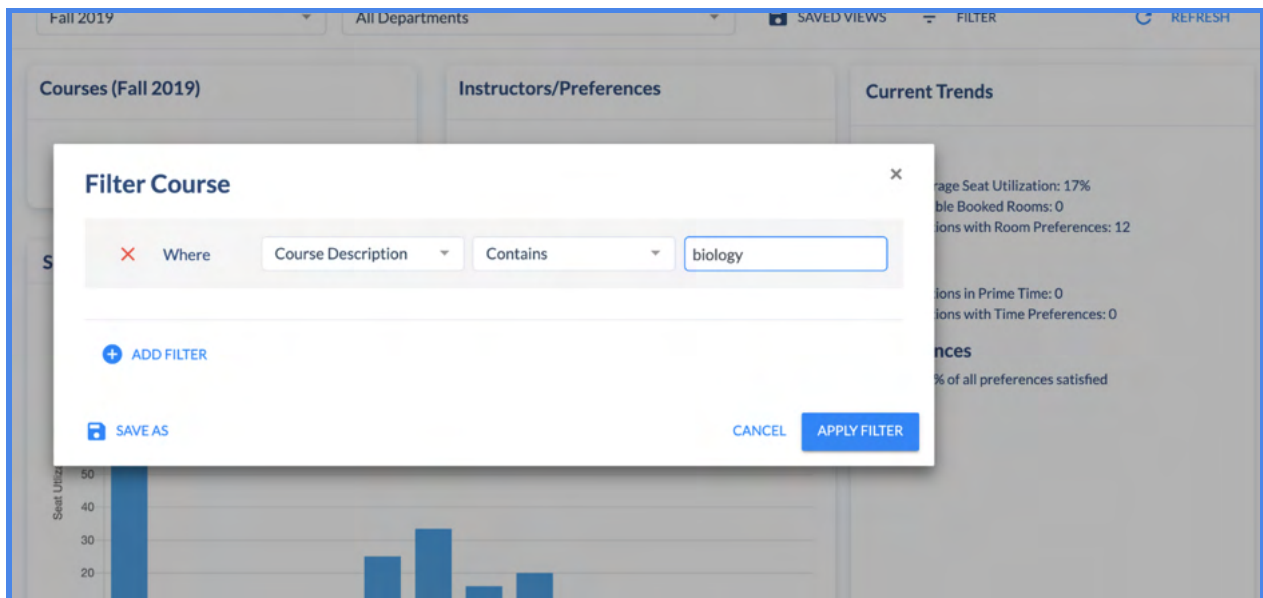
This will take you to a page with a number of available reports that will help you analyze times, departments, space, conflicts and more. In Scheduling Reports, users have the ability to;

- a. Create complex custom filters on all data objects (i.e. filter by individual departments)
- b. Save those filters

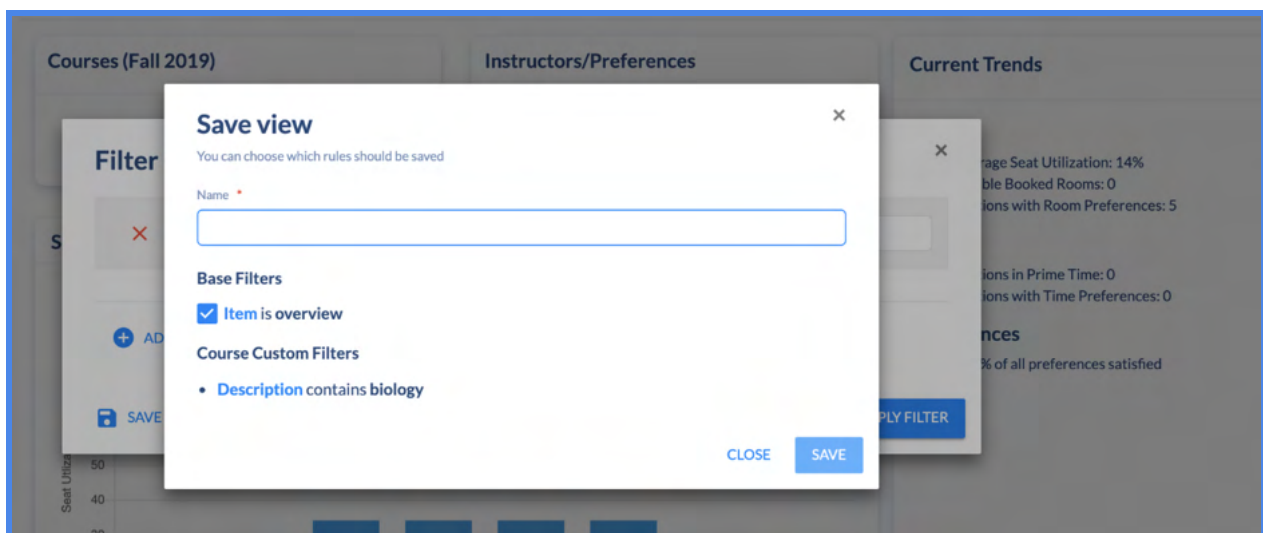


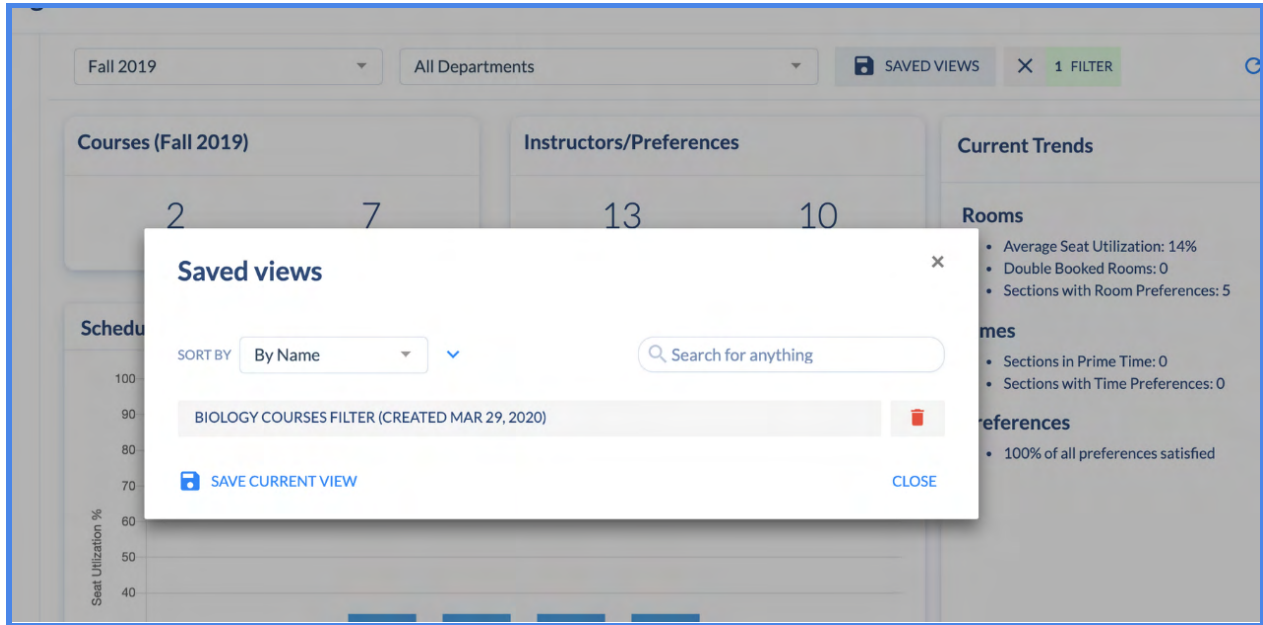
Reports load in 4 different data objects-- courses, sections, rooms, and instructors-- and users can build filters for each of them individually. Simply:

1. Select the desired data object to build a filter for
2. Define the filter using the same 3-part filtering system used unilaterally across the platform (see image below)
3. Click 'Apply the filter'
4. Repeat as necessary for each data object.



Each filter can be saved so it can be easily accessed later:





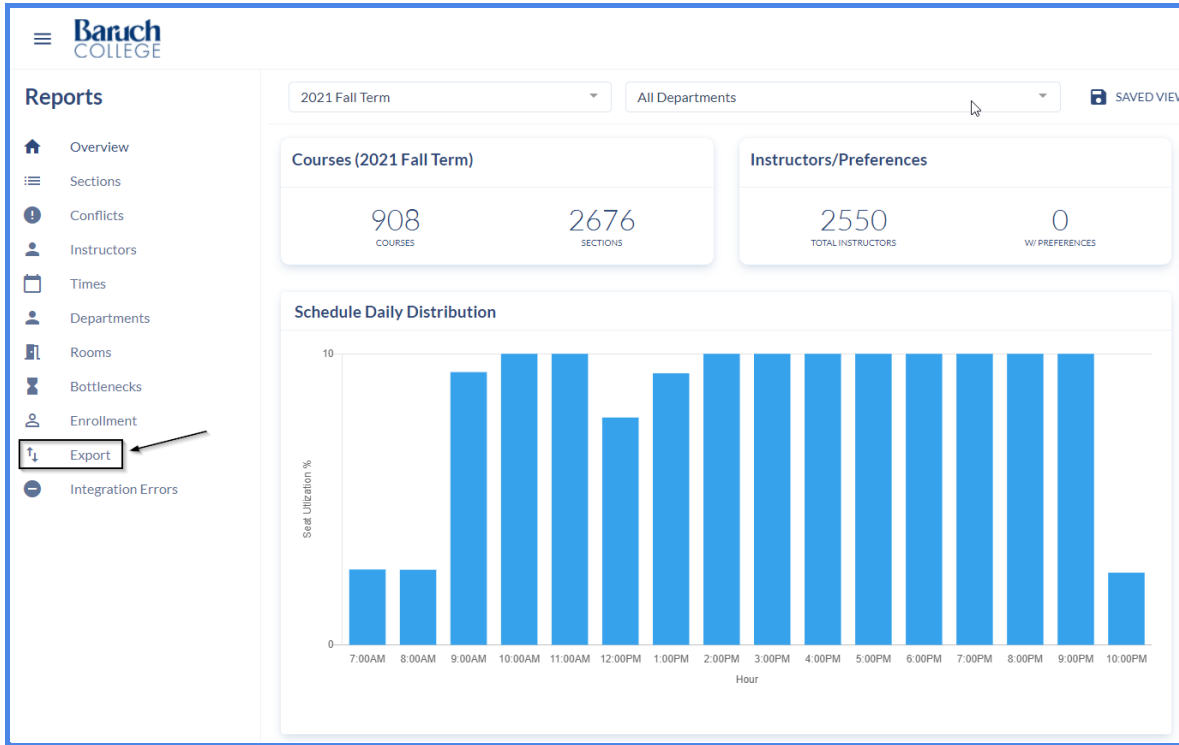
Below is an overview of the different categories of reports available:

- **Overview:** High level view of the number of courses, sections, instructors, and instructor preferences in a given term in addition to the term's daily schedule distribution.
- **Sections:** Review an overview of sections with time and room assignments, section type, preference satisfaction, max enrollment range, sections per course, and preferences.
- **Conflicts:** View all conflicts in the term, and filter by conflict type and view preference satisfaction in the term.
- **Instructors:** View an overview of instructors, instructor assignments, instructor types, average credits, instructor preference satisfaction, instructor availability, and instructors with back to back sections.
- **Times:** View meeting patterns and meeting pattern assignments, schedule hourly distribution, seat utilization by hour, time preference satisfaction, schedule daily distribution, most popular meeting patterns, and meeting pattern usage.
- **Departments:** View number of courses and sections and the status of each department's schedule.
- **Rooms:** View room assignments, room conflicts, usage, seat utilization by hour, day, and room size, most used buildings, average usage by building, average usage by room type, room preference satisfaction, and an overview of rooms.
- **Bottlenecks:** Review a summary of room bottlenecks

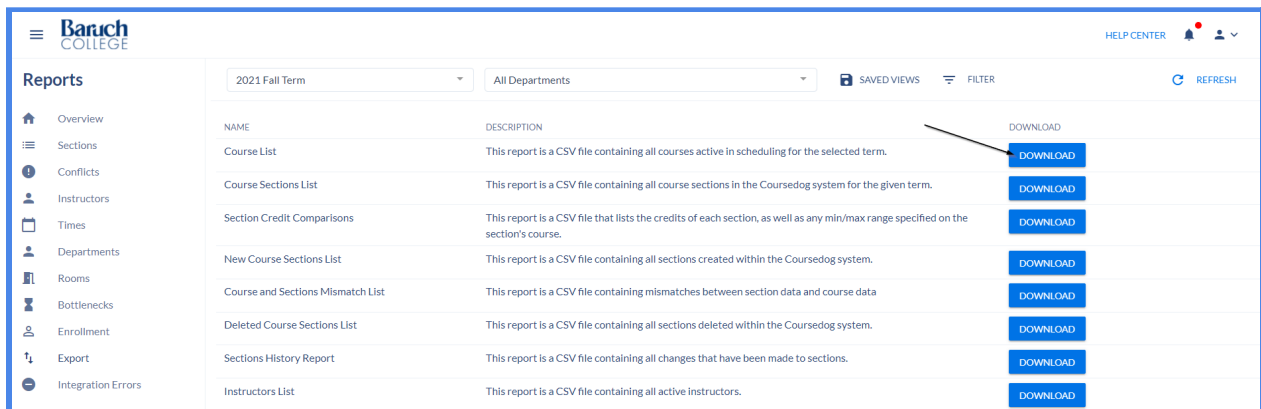
- **Enrollment:** View an enrollment overview, sections by utilization, and an enrollment heatmap

Downloading Reports

1. To download reports select the “Export” tab on the left side bar



2. Select ‘Download’ to download a CSV or XLSX file of desired report

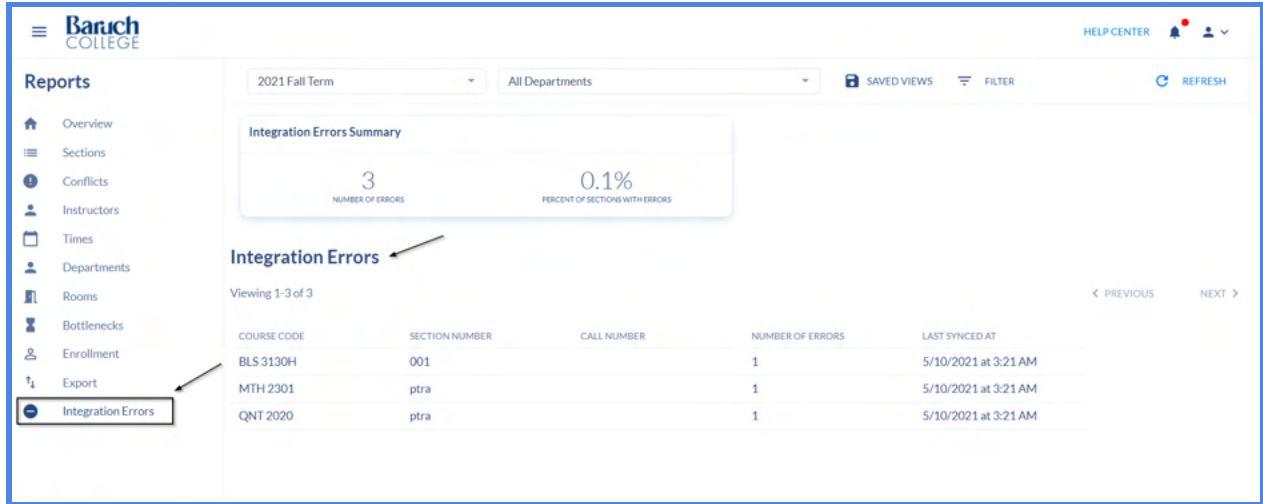


The screenshot shows the 'Export' section of the Reports dashboard. It features a table with columns for 'NAME', 'DESCRIPTION', and 'DOWNLOAD'. An arrow points to the 'DOWNLOAD' button for the 'Course List' report.

NAME	DESCRIPTION	DOWNLOAD
Course List	This report is a CSV file containing all courses active in scheduling for the selected term.	DOWNLOAD
Course Sections List	This report is a CSV file containing all course sections in the Coursedog system for the given term.	DOWNLOAD
Section Credit Comparisons	This report is a CSV file that lists the credits of each section, as well as any min/max range specified on the section's course.	DOWNLOAD
New Course Sections List	This report is a CSV file containing all sections created within the Coursedog system.	DOWNLOAD
Course and Sections Mismatch List	This report is a CSV file containing mismatches between section data and course data	DOWNLOAD
Deleted Course Sections List	This report is a CSV file containing all sections deleted within the Coursedog system.	DOWNLOAD
Sections History Report	This report is a CSV file containing all changes that have been made to sections.	DOWNLOAD
Instructors List	This report is a CSV file containing all active instructors.	DOWNLOAD

Integration Error Reports

In the reporting dashboard, select the **Integration Errors** and this will display a list of all sections that encountered an error during the last integration. Each row is clickable, so users can open up the section editor directly and view the error that occurred:



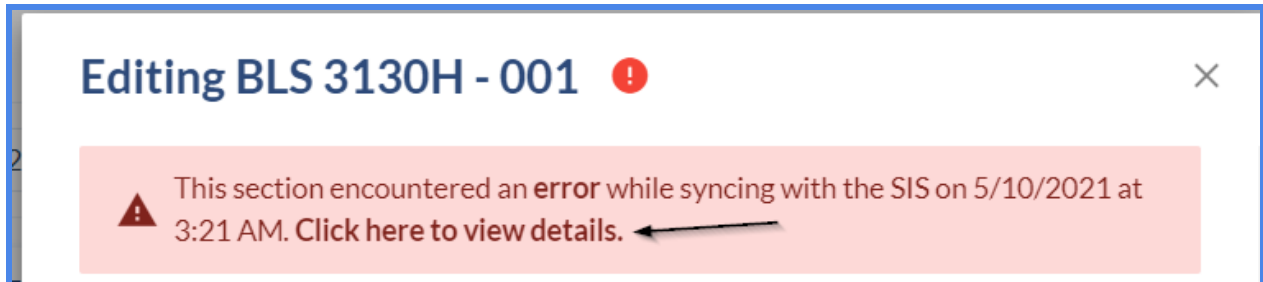
Integration Errors Summary

3 NUMBER OF ERRORS 0.1% PERCENT OF SECTIONS WITH ERRORS

Integration Errors

Viewing 1-3 of 3

COURSE CODE	SECTION NUMBER	CALL NUMBER	NUMBER OF ERRORS	LAST SYNCED AT
BLS 3130H	001		1	5/10/2021 at 3:21 AM
MTH 2301	ptr		1	5/10/2021 at 3:21 AM
QNT 2020	ptr		1	5/10/2021 at 3:21 AM



Editing BLS 3130H - 001

This section encountered an **error** while syncing with the SIS on 5/10/2021 at 3:21 AM. [Click here to view details.](#)

Note: This page is only visible to users who have the View Section Integration Status permission. In order to resolve these Integration Errors, click [here](#) to see the “Common SIS Merge Errors and Resolutions” page on the Coursedog Freshdesk site and select the “**Common Peoplesoft Merge Errors**” pdf document to view the various types of integration errors that would occur in CD from the user.

Real Time Integration

When real-time integration is turned on, sections will sync with Peoplesoft after a user makes edits and the user selects “Save Section.”

Once the sync has begun a user will see a "Syncing with SIS" message at the top of the screen. This usually lasts no longer than a minute (the time to completion depends on Peoplesoft). During the time a section is syncing, users will not be able to make edits to the section to prevent any data collisions while data is sent to Peoplesoft:

Editing LAW3102 - 002 ⚠ 🔄 Syncing section with SIS... ✕

⚠ **No instructor is assigned to teach this section.**

📄 **General Information**

Class Section <input type="text" value="002"/>	Component * <input type="text" value="Lecture"/>
Event Id ? —	Class Number ? —
Class Type <input type="text" value="Enrollment Section"/>	Grading Basis <input type="text" value="Non-Graded Component"/>
Campus <input type="text" value="MAIN"/>	Location <input type="text" value="Set Location"/>
Class Status <input type="text" value="Active"/>	Instruction Mode * <input type="text" value="In Person"/>
Session	

CANCEL
SAVE SECTION

📄 **Activity**

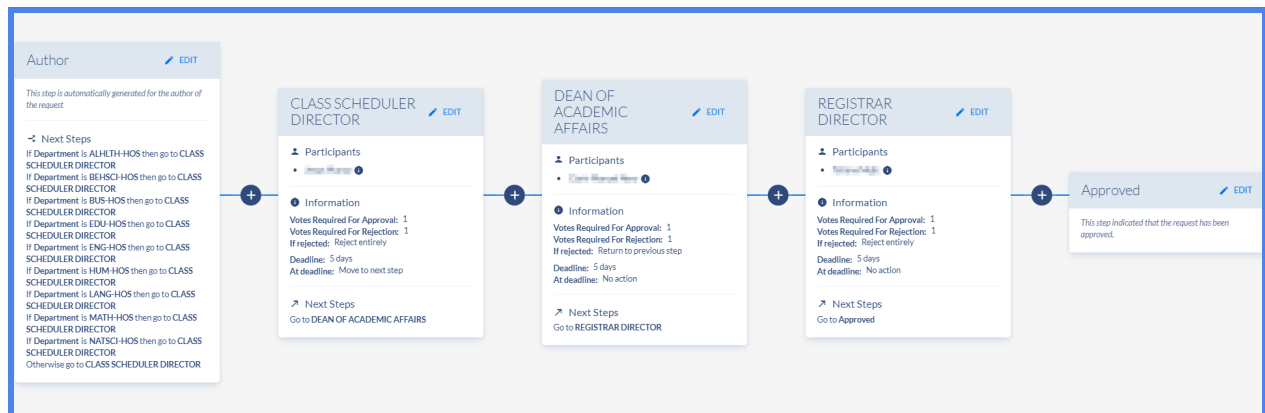
- FINANCIAL AID UNITS
3
You edited this field
4 minutes ago
- FINAL EXAM TYPE
Final
You edited this field
4 minutes ago
- DROP CONSENT
N
You edited this field
4 minutes ago
- INSTRUCTOR EDIT
N
You edited this field
4 minutes ago
- COURSE COUNT
1
You edited this field
4 minutes ago
- REQUIREMENT DESIGNATION
RNL
You edited this field
4 minutes ago
- CLASS TYPE
Enrollment Section
You edited this field
a minute ago
- ROOM: ROW 1
BAR01 - A-1112

Click Enter to comment

Reviewing a Section Change Request

Once Scheduling is finalized (about 95% complete and updated in CUNYfirst), **Department Schedulers** will then be permitted to submit requests for any additional changes to the schedule, including adding additional class sections for a course offered in the upcoming term.

Once a request (editing a class section/adding a new class section) is made, it will go through an approval workflow. The Author (Initiator/Department Scheduler) who had made the request will receive email notifications on the progress of their requests (i.e. Approved, Rejected, Suspended etc.).



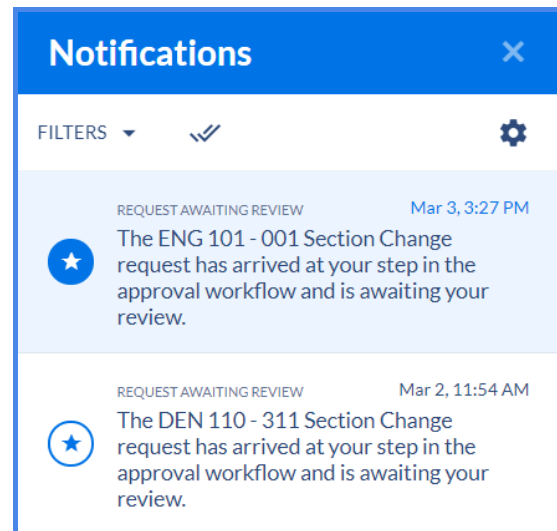
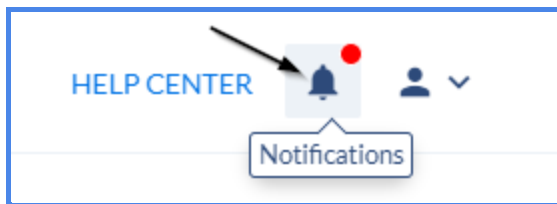
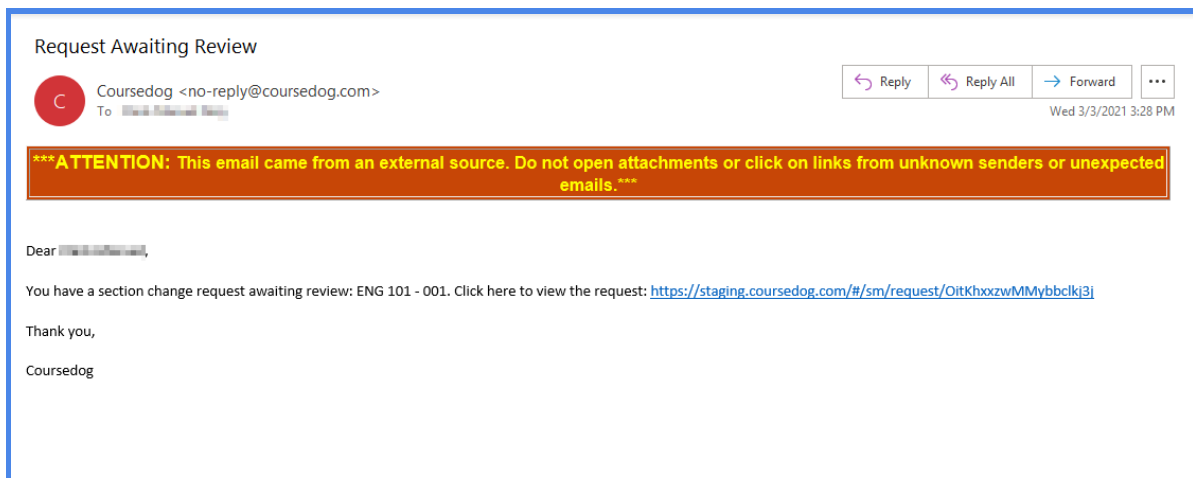
Note: All approval workflows are based on the business process that the institution utilizes during their Scheduling Cycle. Please consult with your local scheduling office (Registrar, Class Scheduling Office etc..) for more information. Any changes to an approval workflow must be addressed with the Office of University Registrar in consultation with the campus scheduling office to make those changes.

Handling Change Requests

Once the Author/Initiator submits a request, it will be sent to all participant(s) included in the approval workflow. Workflow participants will receive notifications about the request via email, and as well in their Notifications dashboard in Coursedog.

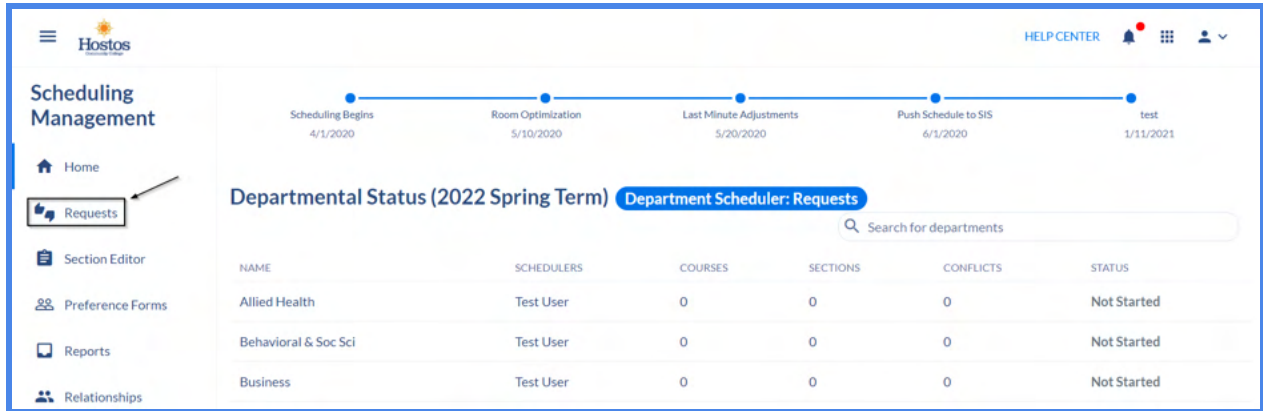
Example from email and Notifications from Coursedog Scheduling Management Tool;

Note: In order to be navigated to the correct request when you select the link you must be logged into the associated account.



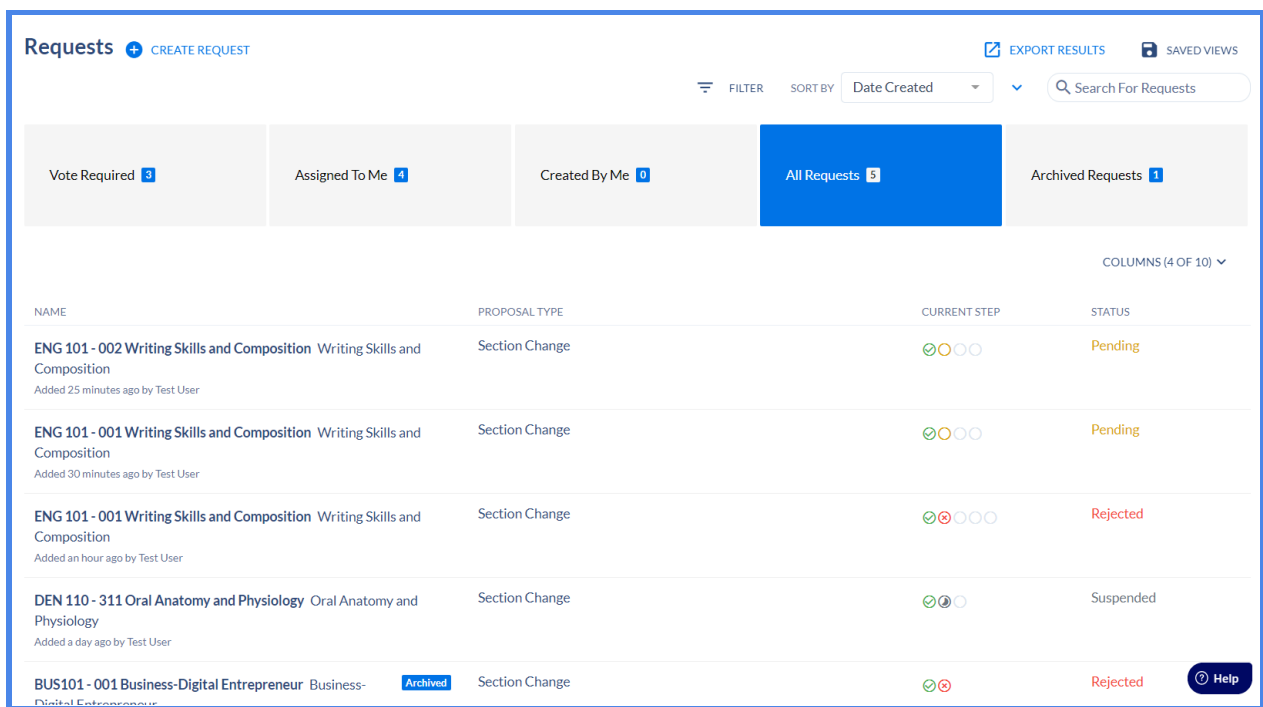
Note: The examples shown below of “Handling Requests” are from a Scheduling Campus Admin view. Click [here](#) to visit the Department Scheduler Guide to know how Department Schedulers make requests (“How to make Requests” section).

1. On the Home page go to the Requests located on the left hand side of the screen.



NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	STATUS
Allied Health	Test User	0	0	0	Not Started
Behavioral & Soc Sci	Test User	0	0	0	Not Started
Business	Test User	0	0	0	Not Started

2. Schedule approvers may approve, reject or ask for more information on the requests that are being made directly from the Requests Dashboard.



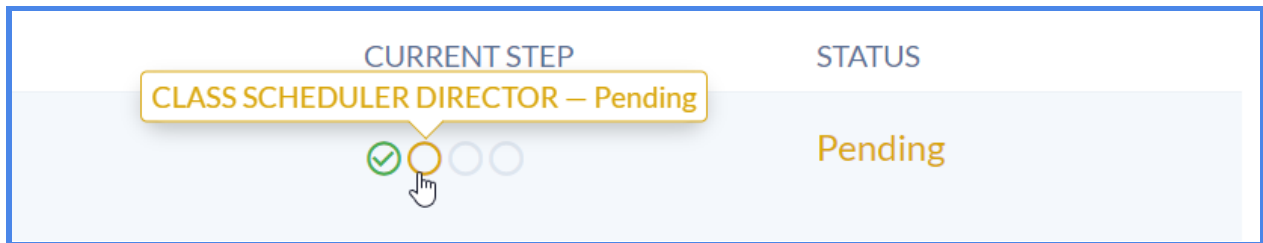
NAME	PROPOSAL TYPE	CURRENT STEP	STATUS
ENG 101 - 002 Writing Skills and Composition	Writing Skills and Composition	Section Change	Pending
ENG 101 - 001 Writing Skills and Composition	Writing Skills and Composition	Section Change	Pending
ENG 101 - 001 Writing Skills and Composition	Writing Skills and Composition	Section Change	Rejected
DEN 110 - 311 Oral Anatomy and Physiology	Oral Anatomy and Physiology	Section Change	Suspended
BUS101 - 001 Business-Digital Entrepreneur	Business-Digital Entrepreneur	Section Change	Rejected

- 1) **“All Requests”** - To find all incoming requests
- 2) **“Vote Required”** - This includes all requests where the user must cast a vote to move the request along the workflow. For all intents and purposes, this is where users should navigate to for their ‘action items.’
- 3) **“Assigned to Me”** - Shows requests that the user did not create where they have already voted, have yet to vote, or where they were intended to vote before someone

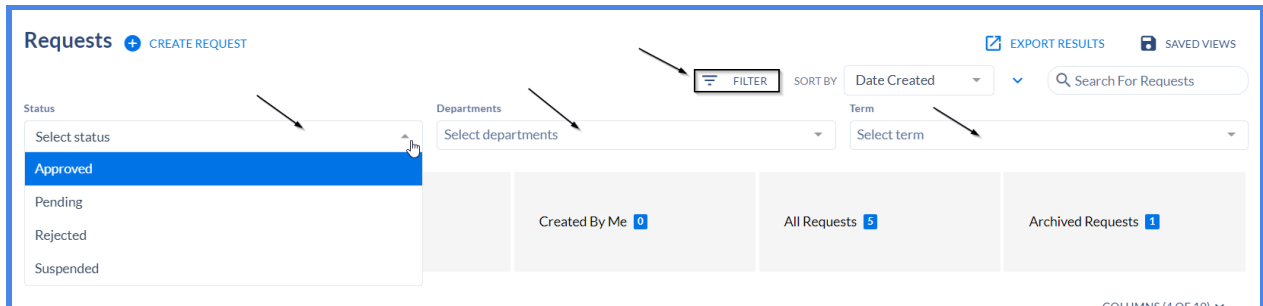
else force approved (and the request was therefore entirely approved, therefore no longer requiring their vote). This tab is helpful, amongst other things, for record-keeping purposes, as it shows requests the user has already voted on.

- 4) **'Created by Me'** - Shows the same items as 'Assigned to Me', but in this case the requests were created by the user themself.

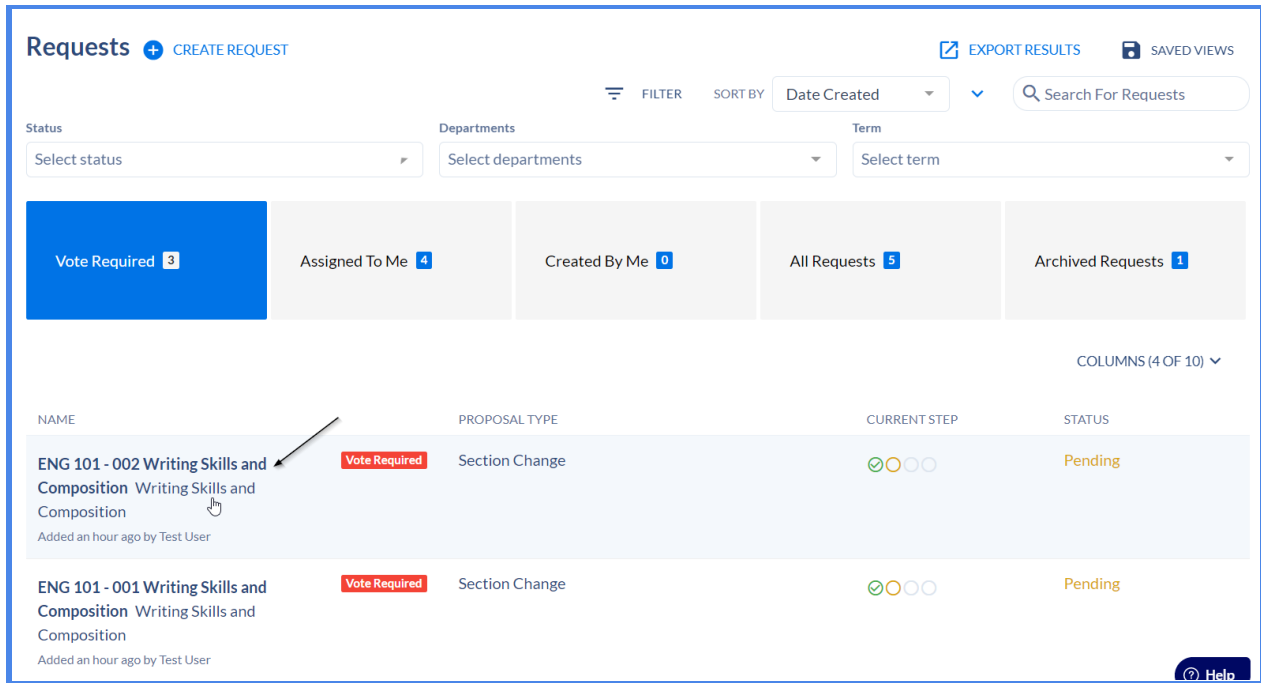
If you go to the right hand side of each request, the status of the request can be shown whether it has been approved, rejected or pending. If you hover over the "Current Step" column, it will show to the user a visual representation of where the request is in the workflow.



Users can go to the top of the screen and select the "FILTER" button to narrow down the requests by Status, Departments and by Term.

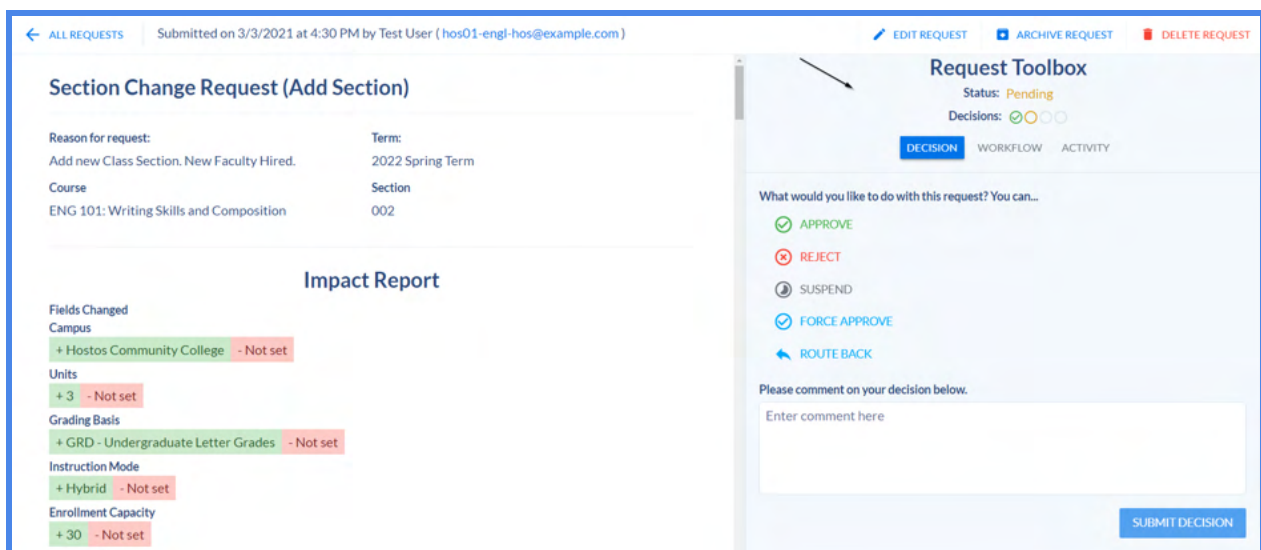


- Under **“Vote Required”** select the Request that was made by the Author/Initiator (i.e. Department Scheduler).



The screenshot shows the 'Requests' dashboard. At the top, there are filters for Status, Departments, and Term. Below these are tabs for 'Vote Required' (3), 'Assigned To Me' (4), 'Created By Me' (0), 'All Requests' (5), and 'Archived Requests' (1). The main table lists requests with columns for Name, Proposal Type, Current Step, and Status. Two requests are visible, both with a 'Vote Required' tag and a 'Pending' status. An arrow points to the first request: 'ENG 101 - 002 Writing Skills and Composition Writing Skills and Composition'.

- Once you select the request, it will display to the user a summary of what the request was made by the author. Below will reveal the **“Impact Report”** that displays the changes that were made in the class section fields, scroll down to the the **“Existing Class Section”** to view the class section fields from a section editor point of view and to the right of the screen it will show the **“Request Toolbox”**;

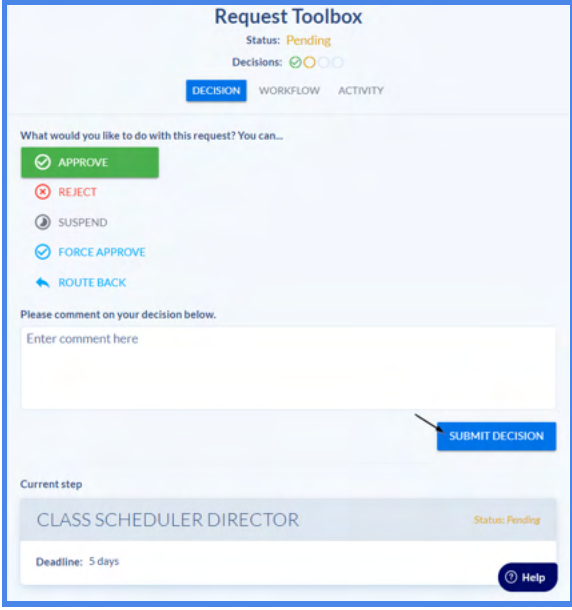


The screenshot shows the 'Section Change Request (Add Section)' page. The top section contains details about the request: Reason for request (Add new Class Section. New Faculty Hired.), Term (2022 Spring Term), Course (ENG 101: Writing Skills and Composition), and Section (002). Below this is the 'Impact Report' section, which lists 'Fields Changed' with a table of changes:

Fields Changed	Change	Current Value
Campus	+ Hostos Community College	- Not set
Units	+ 3	- Not set
Grading Basis	+ GRD - Undergraduate Letter Grades	- Not set
Instruction Mode	+ Hybrid	- Not set
Enrollment Capacity	+ 30	- Not set

On the right side of the page is the 'Request Toolbox' with a status of 'Pending' and a 'DECISION' button. Below the toolbox are options to APPROVE, REJECT, SUSPEND, FORCE APPROVE, and ROUTE BACK. A comment box is also present for providing feedback on the decision.

- 1) **Decision** - Displays to the approver the option to either Approve, Reject, Suspend etc., the current step where the request has landed and its Status, and the approver may also leave a comment on the decision that was made.
 - 2) **Workflow** - Displays all participants in the approval process
 - 3) **Activity** - Displays the users request being admitted and including the fields that were added/edited. This also includes any comments being made by the user or participants, if typed into the Activity log.
5. Once the approver has made a decision, click on the “**SUBMIT DECISION**” button to move the request(s) to the next step in the workflow.



The screenshot shows the 'Request Toolbox' interface. At the top, it displays 'Status: Pending' and 'Decisions: 1/3/0'. Below this are three tabs: 'DECISION' (selected), 'WORKFLOW', and 'ACTIVITY'. The main section is titled 'What would you like to do with this request? You can...' and contains five buttons: 'APPROVE' (green), 'REJECT' (red), 'SUSPEND' (grey), 'FORCE APPROVE' (blue), and 'ROUTE BACK' (blue). Below the buttons is a text input field for a comment, followed by a 'SUBMIT DECISION' button. At the bottom, the 'Current step' is identified as 'CLASS SCHEDULER DIRECTOR' with a 'Deadline: 5 days' and a 'Help' button.

Note: The options listed under Decision (Approve, Reject, Suspend, Force Approve, Route back, Edit Request) will vary for each campus as every institution has their own business process to whether one of the approvers in the workflow should either do any of the following other than Approve or Reject.

Please consult with your local campus and management (Registrar, Class Scheduling Office etc..) for more information. Any changes to an approval workflow must be addressed with CUNY Central OUR to make those changes.

Request Reset Options

If there is a point in time where the requests reaches one of the participants in a particular step of the entire approval workflow and has the option to edit an author’s request, the following options could occur depending on the permissions settings of the role and how your approval workflow is built at the institution for scheduling;

Edit Requests Without Updating Workflow	<input checked="" type="checkbox"/> Allow
Edit Requests And Maintain Approvals	<input checked="" type="checkbox"/> Allow

1. If both permissions are set to "off", and a user edits a request, they will see the following message when they save;

Save & Reset Workflow ×

When a request is edited, the workflow will be automatically reset and all prior approvals will be disregarded. This request will be sent back to the author for their approval. Please click Save to proceed.

CANCEL SAVE

The message explains that saving the request will reset the workflow and disregard all existing approvals. If the request is edited, the workflow will automatically reset and all prior approvals will be disregarded. The request will be sent back to the author for their approval.

For example, the request is reached at the Registrar Step in the approval workflow, all prior steps were approved by the Class Scheduling Office and then the Dean’s Office. The participant at the Registrar step has decided to edit the request and go down to the **“Edit Section Change Request”** section of the page and changed the Days and Times of the class section, once they save the changes and click save on the **“Save & Reset Workflow”** card, the request will go back to the author and the approval workflow will start over again.

2. If one or both permissions are set to “on”, the user will have a dropdown menu after they edit a request, allowing them to choose a request reset option;

Save & Reset Workflow ×

You have the permissions to specify what should happen to the workflow of this request after your edit is saved. Please select one of the following options and then click Save to proceed.

Select Option ▲

Reset Workflow - All prior approvals will be disregarded

Reset Workflow - All prior approvals will be maintained

Do Not Reset Workflow

Resetting the workflow means regenerating the workflow based on the workflow template defined in settings. All logic jumps and dynamic steps will be re-evaluated, and any new steps that result will be injected into the reset workflow.

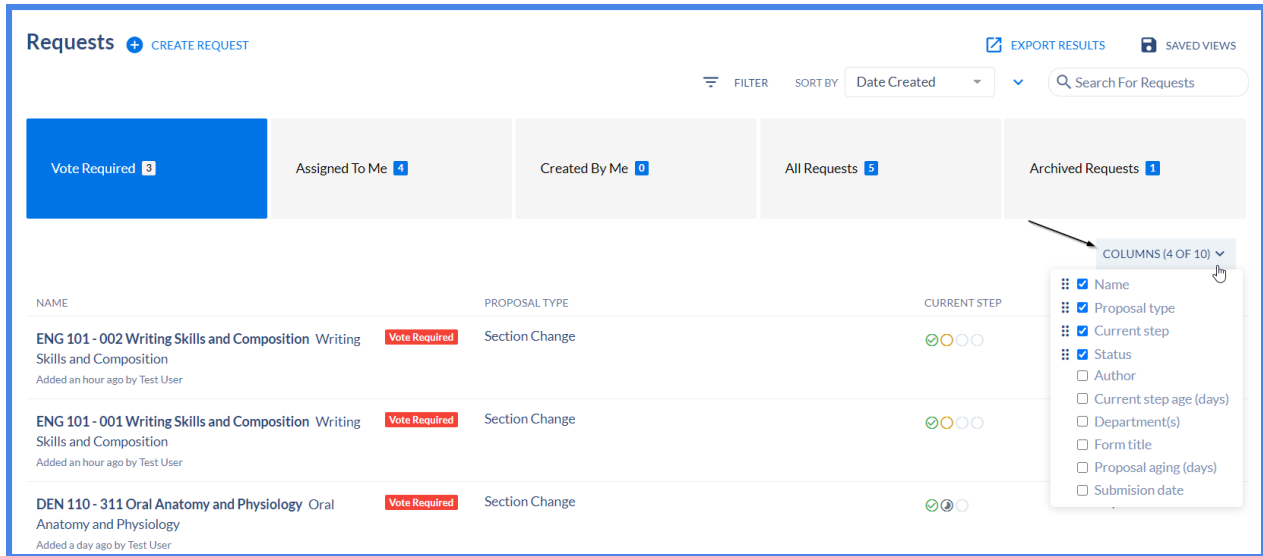
There are the following options for resetting a workflow:

- 1) **Reset Workflow - All prior approvals will be disregarded.** This is the default logic that will be implemented when a user does not have any of the extra permissions. This will reset the workflow, remove all existing approvals, and send the request back to the author step
- 2) **Reset Workflow - All Prior approvals will be maintained.** This action will reset the workflow, but keep all existing approvals. If after the workflow resets, no new steps have been added, the workflow should remain at its current step. If any new steps were added to the workflow during the reset process, the workflow will be sent back to the first step that has not been approved.
- 3) **Do Not Reset Workflow -** This action will allow users to save the request without resetting the workflow.

Note: Please consult with CUNY Central Office, if Reset of Workflow is part of your business process when a participant in the workflow edits a request from an author/initiator (Department Scheduler).

Requests Columns and Saved Views

All Requests pages have a "Columns" component that allows users to configure which columns are displayed, and the order of those columns.

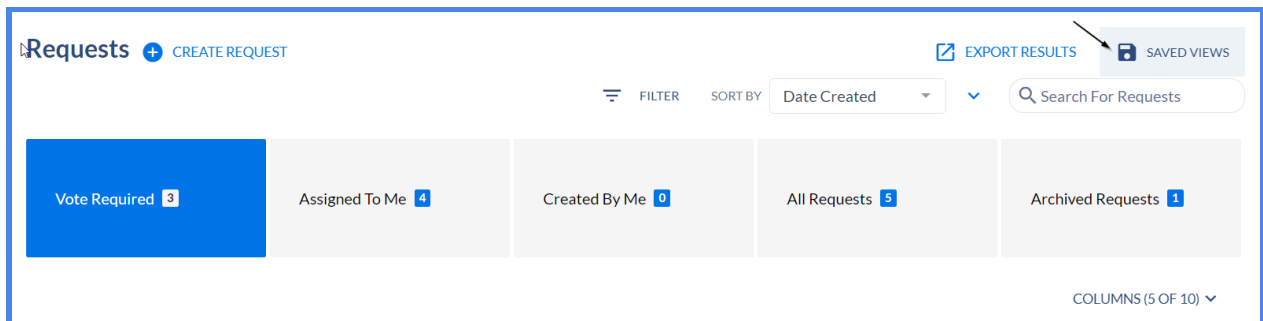


The screenshot shows the Requests dashboard with a table of requests. A dropdown menu titled "COLUMNS (4 OF 10)" is open, showing a list of columns with checkboxes:

- Name
- Proposal type
- Current step
- Status
- Author
- Current step age (days)
- Department(s)
- Form title
- Proposal aging (days)
- Submission date

NAME	PROPOSAL TYPE	CURRENT STEP
ENG 101 - 002 Writing Skills and Composition Skills and Composition <small>Added an hour ago by Test User</small>	Writing Vote Required Section Change	🟢🟡🟠⚪
ENG 101 - 001 Writing Skills and Composition Skills and Composition <small>Added an hour ago by Test User</small>	Writing Vote Required Section Change	🟢🟡🟠⚪
DEN 110 - 311 Oral Anatomy and Physiology Anatomy and Physiology <small>Added a day ago by Test User</small>	Oral Vote Required Section Change	🟢🟡🟠

Users can also save the combination of columns and filters into the **“SAVED VIEWS”** button, that can easily be accessed in the top right of the Requests dashboard.





The screenshot shows the Requests dashboard with the "SAVED VIEWS" button highlighted in the top right corner. The dashboard layout is identical to the previous screenshot, but the "COLUMNS" dropdown is not open.

Select the **“SAVE CURRENT VIEW”** button and name the Saved View, afterwards select the **SAVED VIEWS** button again for the user to select the Saved View that was created.

Saved views ✕

You can set your default view in [Account Settings](#)

No saved views

 **SAVE CURRENT VIEW** 

CLOSE


Save view ✕

You can choose which rules should be saved

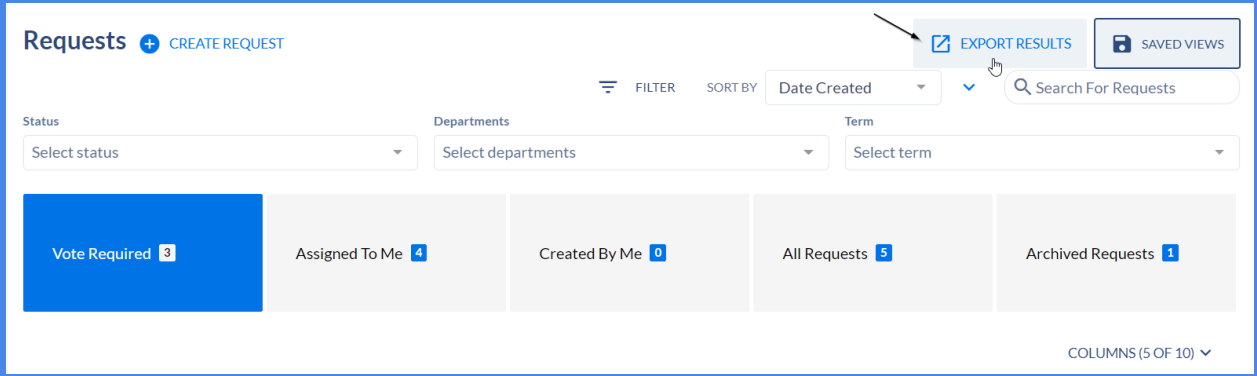
Name **required**

Base Filters

- Relation** is approval-required
- Columns** is Name, Proposal type, Current step, Status, Author

CLOSE  **SAVE**

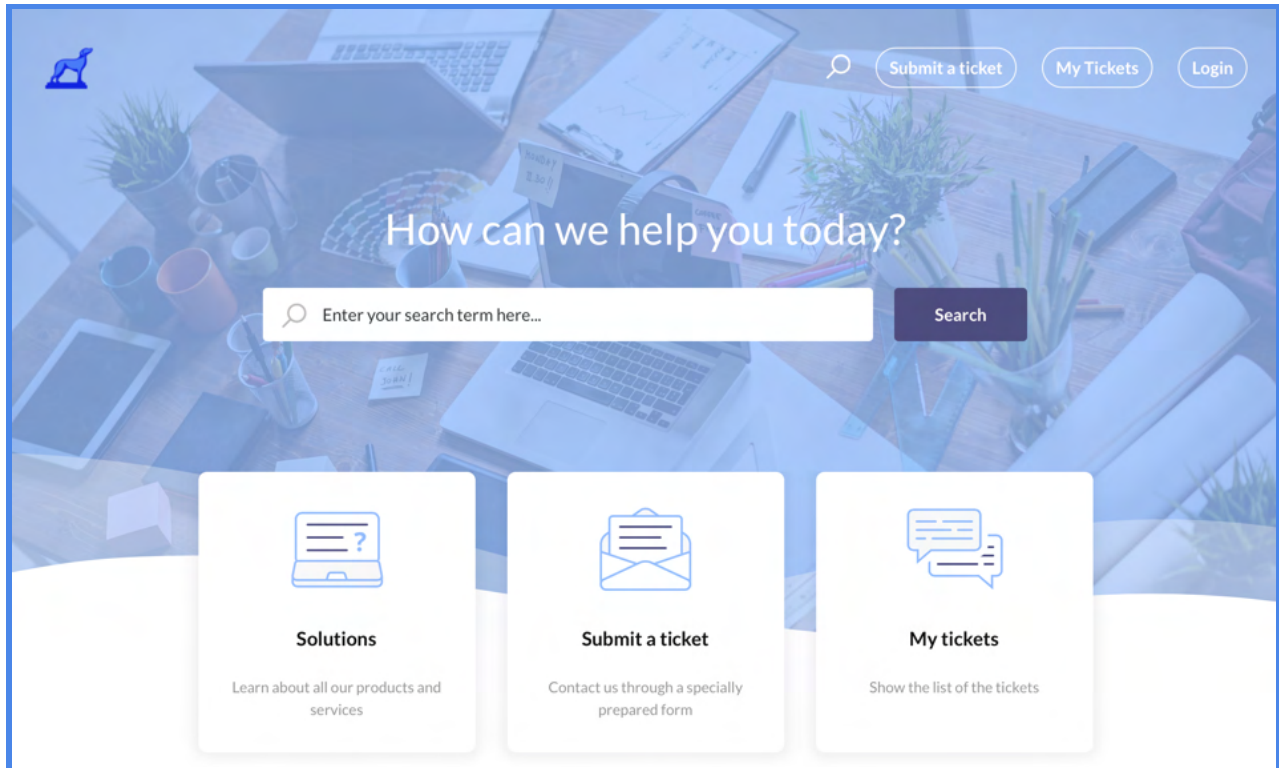
Users can export the request data into a CSV file, which will apply to the filters and columns the user has selected.



The screenshot displays the 'Requests' dashboard interface. At the top left, it says 'Requests' with a '+ CREATE REQUEST' button. On the right, there is an 'EXPORT RESULTS' button with a download icon and a 'SAVED VIEWS' button. Below these are 'FILTER' and 'SORT BY' options. The 'SORT BY' dropdown is set to 'Date Created'. A search bar labeled 'Search For Requests' is also present. Below the search bar are three filter dropdowns: 'Status' (set to 'Select status'), 'Departments' (set to 'Select departments'), and 'Term' (set to 'Select term'). At the bottom, there are five filter buttons: 'Vote Required 3' (highlighted in blue), 'Assigned To Me 4', 'Created By Me 0', 'All Requests 5', and 'Archived Requests 1'. In the bottom right corner, it says 'COLUMNS (5 OF 10)' with a dropdown arrow.

Coursedog Support Model

The Coursedog support center is the best way to answer any questions you have about the Coursedog platform through Articles and Support Tickets.

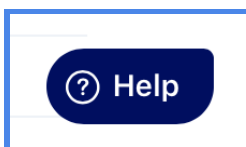


Level 1 - Solution Articles

If any questions arise when using Coursedog, we recommend reviewing the Freshdesk library of solution articles. We have tons of articles about every topic and feature within Coursedog, so it is likely your question is answered in one of the articles. There are two ways to access these articles:

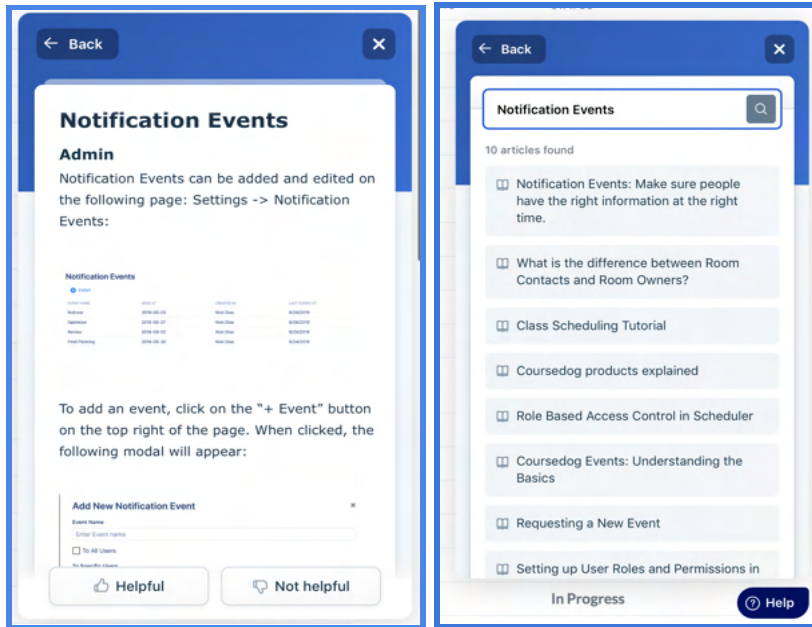
1. In Coursedog

No matter where you are within the platform, there is a help button in the bottom right corner that allows you to quickly access support articles while using Coursedog.



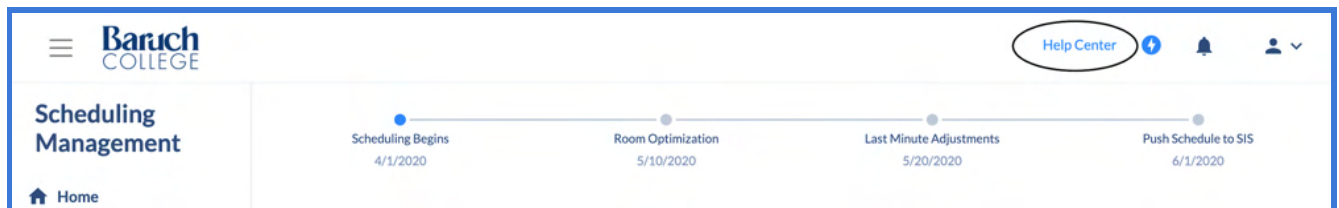
Clicking ‘*Help*’ in the lower right-hand corner will open the help center and allow you to enter the topic or question you are looking to have answered.

From here, you can seamlessly find solutions without ever leaving Coursedog.

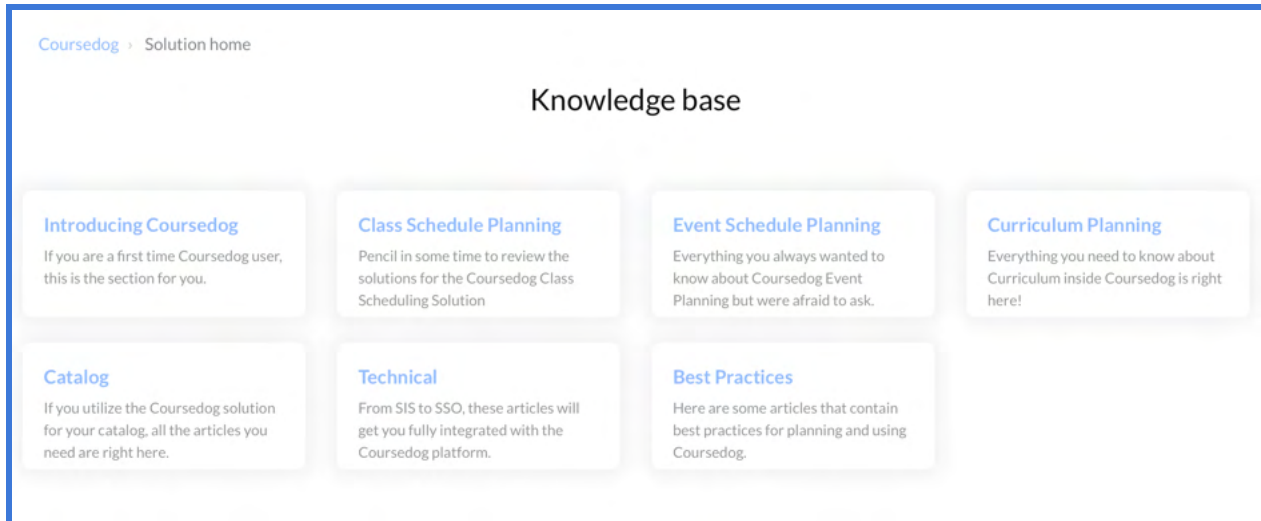


2. Online Support Center

If you want to easily navigate the support articles by product and category, you can visit the online support center [here](#), or you can select ‘Help Center’ in the upper right corner of Coursedog to navigate to Freshdesk:



From the Freshdesk homepage you can quickly search for a topic or select the 'Solutions' button to access the Knowledge Base where you can see all available articles:



The screenshot shows the Coursedog Knowledge Base homepage. At the top left, there is a breadcrumb trail: "Coursedog > Solution home". The main heading is "Knowledge base". Below this, there are seven article cards arranged in two rows. The first row contains four cards: "Introducing Coursedog", "Class Schedule Planning", "Event Schedule Planning", and "Curriculum Planning". The second row contains three cards: "Catalog", "Technical", and "Best Practices". Each card has a title in blue, a sub-heading, and a short paragraph of text.

Coursedog > Solution home

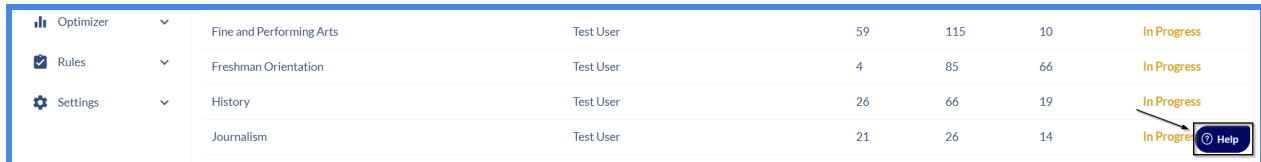
Knowledge base

- Introducing Coursedog**
If you are a first time Coursedog user, this is the section for you.
- Class Schedule Planning**
Pencil in some time to review the solutions for the Coursedog Class Scheduling Solution
- Event Schedule Planning**
Everything you always wanted to know about Coursedog Event Planning but were afraid to ask.
- Curriculum Planning**
Everything you need to know about Curriculum inside Coursedog is right here!
- Catalog**
If you utilize the Coursedog solution for your catalog, all the articles you need are right here.
- Technical**
From SIS to SSO, these articles will get you fully integrated with the Coursedog platform.
- Best Practices**
Here are some articles that contain best practices for planning and using Coursedog.

Level 2 - Submitting Support Tickets

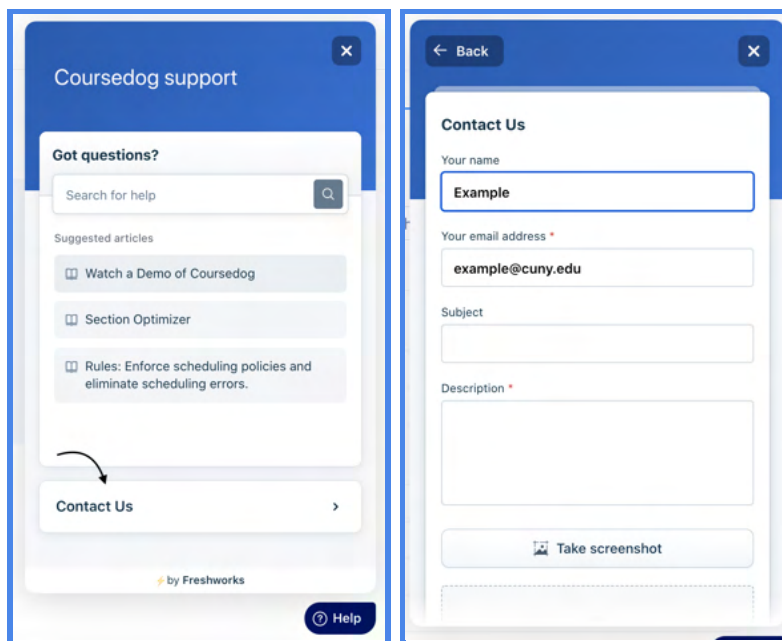
If you run into a question that you cannot resolve with the above resources you can submit a support ticket to the dedicated Coursedog support team through the Freshdesk Help Center Widget in the bottom right corner of Coursedog.

1. To submit a support ticket, select the **'Help'** button.



Optimizer	Fine and Performing Arts	Test User	59	115	10	In Progress
Rules	Freshman Orientation	Test User	4	85	66	In Progress
Settings	History	Test User	26	66	19	In Progress
	Journalism	Test User	21	26	14	In Progress

2. Select 'Contact Us.' A ticket will pop-up pre-populated with your name and your CUNY email address. Do not change either of these fields.



Add a descriptive subject, and a thorough description of the issue. Please include images if relevant, and as much detail as possible. The support team will be notified of the ticket and will work swiftly to respond. The system will recognize your user account so that the Coursedog support team will have insight into the product you are using and the problem that is arising within your environment.

Once the support team responds to your inquiry you will receive an email with the response. If you need additional clarification, or if the support team has any follow-up questions, the conversation can be continued over email.

Note: *Any Scheduling Department Schedulers or Scheduling Faculty Workload Coordinators who have any questions or issues will contact the Scheduling Campus Admin who are the Primary Contact. Scheduling Campus Admin who are Primary Contact are listed in their Functional Guides.*

Upon submission the CUNY Central Office Support Team is also notified of the CRM.

Level 3 - CUNY Support

If the Coursedog team is not able to resolve the issue or requires assistance from CUNY OUR/CIS, OUR will open a CRM to triage the CUNYfirst/Coursedog integration issue and resolve the Freshdesk ticket.

Note: *Campus users who are live using the Scheduling Management Tool, should always use Freshdesk to open tickets and report issues that are in Production.*

Appendix

Daily Digest

In Coursedog, various events trigger email notifications, including notifications for requests awaiting the user's review. Users dealing with large volumes of requests may wish to receive a daily email digest rather than immediate notifications in order to minimize the number of emails received.

In Account settings, users can specify for each product, the desired request workflow notification setting. Navigate to Account Settings by clicking on the person icon on the top right of the application and select 'Account Settings.' Within Account Settings, specify whether you would like to receive immediate email notifications for Request notifications or a daily digest. Note that these settings only apply to email notifications that notify users that a request has reached their step in the workflow.

Helpful Tip: If you are a workflow participant, set your notification preferences to 'Daily Digest' to reduce notifications in your email inbox.

