Portland State University

Department Scheduler Training Manual

www.pdx.edu/academic-scheduling

Academic Scheduling
9-29-2015
## Contents

Academic Scheduling Cycle ....................................................................................................................................... 5  
Overview................................................................................................................................................................. 5  
201604-201703 Scheduling Timeline ..................................................................................................................... 6  
201704-201803 Scheduling Timeline ..................................................................................................................... 7  
Scheduling Policy ........................................................................................................................................................ 8  
Classroom Scheduling Policy Memo...................................................................................................................... 8  
Cross-listing Policy ............................................................................................................................................... 11  
Class Schedule Time Grid ..................................................................................................................................... 12  
Scheduling Process .................................................................................................................................................... 13  
Banner Access Request (RBAR) .......................................................................................................................... 13  
Draft Processing .................................................................................................................................................... 14  
Instructions ....................................................................................................................................................... 14  
Submitting Your Completed Draft ................................................................................................................... 15  
Tips for Avoiding Common Mistakes .............................................................................................................. 15  
Excel Tips .............................................................................................................................................................. 16  
Course Section Maintenance (CSM) Forms ......................................................................................................... 18  
Overview .......................................................................................................................................................... 18  
Adding a Course ............................................................................................................................................... 18  
Changing an Existing Course ........................................................................................................................... 19  
Canceling an Existing Course ........................................................................................................................... 19  
Submitting Completed CSM Forms ................................................................................................................. 19  
Detailed CSM Form Field Descriptions ........................................................................................................... 19  
Ad Hoc Room Requests ........................................................................................................................................ 22  
Academic Ad Hocs ............................................................................................................................................... 22  
Non-Academic Events ...................................................................................................................................... 22  
Banner Screens .......................................................................................................................................................... 23  
Overview of Academic Scheduling BANNER Screens ........................................................................................ 23  
Banner Navigation Tools ...................................................................................................................................... 23  
Banner Screens ...................................................................................................................................................... 24  
SCACRSE – Catalog Level Information ............................................................................................................ 24  
SSASECT – Section Level Information ............................................................................................................ 25  
SSAXLST – Cross List Definition Screen ....................................................................................................... 27
Academic Scheduling Cycle

Overview

The major components of the scheduling cycle are detailed below. Click on the heading to jump to that location in the document.

Drafts

The start of the scheduling cycle for each term begins with drafts. In order to create the drafts, we roll the course offerings from the previous year (i.e. Fall 2012 is rolled into Fall 2013) using a Banner job submission. Next we run a Cognos report that creates an excel spreadsheet with all of the course information that will be used for the upcoming term. These excel spreadsheets are then sent to departments and departments are tasked with adding, changing or deleting the courses on the spreadsheet. When departments are finished editing their drafts, they are returned to us and we make all of the edits in Banner.

Rooming

After we are done entering all of the edits from the drafts into Banner, we push the course data into our rooming software, Ad Astra. Departments are then given two weeks to go into Ad Astra and room courses in their departmentally controlled space, request general pool classrooms, assign room preferences, request computer labs and request distance learning classrooms.

Course Section Maintenance (CSM) Forms

Once rooming is done, we start processing CSM’s. Departments can email us CSM’s prior to the rooming deadline and we will hold onto them, replying when they are complete. We do our best to get as many changes done before the schedule goes live, but there are no guarantees. For meeting time changes before the schedule goes online, we only require a change CSM. After the schedule goes online, any meeting time changes will have to be done with a cancel and add CSM.

Room Change Requests

Room change requests are processed three weeks prior to the start of the term. Room changes are requested via email. Requests can be e-mailed to us prior to the process date, and we will hold them in a queue until they are processed and confirmed. Requests are processed in the order they were received.

Ad Hoc Room Requests

Ad hoc room requests are processed after the first two weeks of the term. There are many changes in classes during the first two weeks of the term, so we want to make sure that each class has a room before we start reserving additional classrooms for ad hocs. Common academic ad hocs include thesis presentations and alternate exam rooms. Ad hocs are requested via email.
201604-201703 Scheduling Timeline

IMPORTANT DATES FOR THE FALL 2016 SCHEDULE

- Draft sent to departments: January 25, 2016
- Draft due back: February 22, 2016
- Online class schedule live: April 25, 2016
- Fall registration begins: May 9, 2016
- Classes begin: September 26, 2016

IMPORTANT DATES FOR THE WINTER 2017 SCHEDULE

- Draft sent to departments: July 18, 2016
- Draft due back: August 15, 2016
- Online class schedule live: October 24, 2016
- Winter registration begins: November 7, 2016
- Classes Begin: January 9, 2017

IMPORTANT DATES FOR THE SPRING 2017 SCHEDULE

- Draft sent to departments: October 24, 2016
- Draft due back: November 21, 2016
- Online class schedule live: February 6, 2017
- Spring registration begins: February 20, 2017
- Classes begin: April 3, 2017

IMPORTANT DATES FOR THE SUMMER 2017 SCHEDULE

- Draft sent to departments: January 3, 2017
- Draft due back: January 31, 2017
- Online class schedule live: April 24, 2017
- Summer registration begins: May 8, 2017
- Classes begin: June 26, 2017
# 201704-201803 Scheduling Timeline

## IMPORTANT DATES FOR THE FALL 2017 SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft sent to departments</td>
<td>January 30, 2017</td>
</tr>
<tr>
<td>Draft due back</td>
<td>February 27, 2017</td>
</tr>
<tr>
<td>Online class schedule live</td>
<td>May 1, 2017</td>
</tr>
<tr>
<td>Fall registration begins</td>
<td>May 15, 2017</td>
</tr>
<tr>
<td>Classes begin</td>
<td>September 25, 2017</td>
</tr>
</tbody>
</table>

## IMPORTANT DATES FOR THE WINTER 2018 SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft sent to departments</td>
<td>July 17, 2017</td>
</tr>
<tr>
<td>Draft due back</td>
<td>August 14, 2017</td>
</tr>
<tr>
<td>Online class schedule live</td>
<td>October 23, 2017</td>
</tr>
<tr>
<td>Winter registration begins</td>
<td>November 6, 2017</td>
</tr>
<tr>
<td>Classes Begin</td>
<td>January 8, 2018</td>
</tr>
</tbody>
</table>

## IMPORTANT DATES FOR THE SPRING 2018 SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft sent to departments</td>
<td>October 23, 2017</td>
</tr>
<tr>
<td>Draft due back</td>
<td>November 20, 2017</td>
</tr>
<tr>
<td>Online class schedule live</td>
<td>February 5, 2018</td>
</tr>
<tr>
<td>Spring registration begins</td>
<td>February 19, 2018</td>
</tr>
<tr>
<td>Classes begin</td>
<td>April 2, 2018</td>
</tr>
</tbody>
</table>

## IMPORTANT DATES FOR THE SUMMER 2018 SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft sent to departments</td>
<td>January 2, 2018</td>
</tr>
<tr>
<td>Draft due back</td>
<td>January 30, 2018</td>
</tr>
<tr>
<td>Online class schedule live</td>
<td>April 23, 2018</td>
</tr>
<tr>
<td>Summer registration begins</td>
<td>May 7, 2018</td>
</tr>
<tr>
<td>Classes begin</td>
<td>June 25, 2018</td>
</tr>
</tbody>
</table>
Scheduling Policy

Classroom Scheduling Policy Memo

Date: July 17, 2007
To: Deans, Directors, and Department Chairs
From: Lindsay Desrochers, VP FADM
       Roy Koch, Provost & VP OAA
Subject: Classroom Scheduling Policy Changes

As you know, the Associate & Assistant Deans formed a task force to evaluate classroom scheduling policies and recommend methods for more effective classroom utilization. This was prompted by the current and projected offline status of Shattuck Hall, Lincoln Hall, PCAT and Science Building II which has resulted in an immediate and critical shortage of 18,000 square feet of instructional space. This space shortage relates to existing enrollments and will be exacerbated by the increased enrollments in 2007-08 and beyond.

The task force, assigned by Vice Provost Carol Mack, has conducted a thorough review. The task force included staff or faculty from each school and college. We endorse their policy recommendations.

In the upcoming months, Vice Provost Mack will mobilize members of the task force as well as members of the classroom scheduling team located in the Office of Admission, Registration & Records (ARR) to conduct information and training sessions with scheduling staff and departmental faculty in each school and college.

Concurrent with implementation of these policies, a second task force is evaluating technology solutions to provide more efficient rooming options as well as better reporting of building and classroom use. The work of this group, headed by Vice Provost Mack and Associate Vice President Mark Gregory will be concluded no later than September.

Please note the policy changes below. Some of them represent a considerable change in our current scheduling methods. As stated in the document many of these changes will go into effect Winter term 2008. Please distribute this information widely, to all faculty and staff.

1. **Departmentally-controlled classrooms are available for general pool assignment when they are not in use for department’s credit-bearing courses.**
   - ARR will deploy these controlled spaces exclusively on an as-needed, case-by-case basis to accommodate unmet demands from other departments. Rooms will be available for central scheduling for credit classes through the end of the second week of the term.
   - This policy requires departments to consider all non-instructional, ad-hoc use of classrooms to be tentative until university enrollment/registration needs for the term have been met.

   **Policy implementation:** Winter Term 2008
   **Staff responsible:** ARR and departmental schedulers

2. **A 75% minimum fill rate (based on actual enrollment) for all large (>39 capacity) classrooms has been established.**
This policy establishes that all classroom assignments in general pool and departmentally controlled classrooms are tentative until enrollment is known, through the end of the second week of the term. Beginning three weeks prior to the start of the term, ARR may relocate courses from classrooms when actual enrollment does not meet the 75% fill rate.

- Note: Classes that do not meet the 75% fill rate will only be relocated if another department has unmet need. Technology requirements will factor significantly in room determination.

**Policy implementation:** Winter term 2008  
**Staff responsible:** ARR and departmental schedulers

3. **All departments that control classrooms having >39 capacity and which do not meet a minimum 75% fill rate will be asked to assign two or more class time periods during the M/W/F or T/TH 10:00-14:00 time periods for general pool instructional placements.**

- Unused rooms held by ARR will be released to the departments by the end of the second week of the term. This policy requires scheduling software not currently in use.

**Policy implementation:** Spring Term 2008  
**Staff responsible:** OIT, ARR and departmental schedulers

4. **Room assignments will no longer be published in the quarterly hard copy Schedule of Classes. Icons identifying off-campus and online courses will continue to be published. Tentative room assignments will be posted in the online Schedule for faculty, staff and students at least two weeks prior to the term start date.**

**Policy implementation:** Winter term 2008  
**Staff responsible:** ARR Scheduling Team

- Note that extensive communication planning will begin during fall term to provide advance notice of this change to the campus communities. This includes Vanguard notice, email notice to students and faculty, as well as prominent online and printed Schedule of Classes postings.
- Although the room assignments will not be published in hard copy in advance, faculty and departmental schedulers may continue to view tentative classroom placements in Banner.

5. **Except for exclusive evening and weekend programs, departments will distribute course offerings across zones in the day. The zone distribution target percentages are shown below. The intended outcome is to spread course offerings so that approximately 10% of enrollment is redistributed from the most popular time zone (10-2) to other less popular times. The table below reflects a reduction in the 10-2 time period from 40% of all sections to 30%. The 10% difference is spread among the other less popular time zones. The enrollment percentages were not adjusted for the evening time periods.**

<table>
<thead>
<tr>
<th>Zone</th>
<th>M/W/F</th>
<th>Percent</th>
<th>Zone</th>
<th>T/R</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>07:45-10:05</td>
<td>10%</td>
<td>2</td>
<td>08:00-9:50</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>10:15-13:50</td>
<td>15%</td>
<td>4</td>
<td>10:00-13:50</td>
<td>15%</td>
</tr>
<tr>
<td>5</td>
<td>14:00-16:20</td>
<td>10%</td>
<td>6</td>
<td>14:00-15:50</td>
<td>10%</td>
</tr>
<tr>
<td>7</td>
<td>All evening</td>
<td>30%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Policy Implementation:** Winter term 2008 with first departmental assessment of course
distribution occurring in spring 2008.

Staff responsible: Departmental chairs and schedulers

6. Eliminate the second room scheduling draft. Move the first draft closer to the beginning of the term for improved planning.

   Policy implementation: Accomplished at fall term 2007
   Staff responsible: ARR and departmental schedulers

7. Modify the evening time grid to eliminate 16:00-17:15, 16:00-17:50 and 18:00-19:50 from the approved, in-grid offerings.

   Policy implementation: Winter term 2008
   Staff responsible: ARR and departmental schedulers

8. Departments which control space are encouraged to negotiate “pairings” with other departments for efficient use of controlled classroom utilization. A minimum 75% fill rate remains a requirement for “paired” sections.

   Policy implementation: Winter term 2008
   Staff responsible: ARR and departmental schedulers

   • Note that another task force will begin study of options to improve room utilization by pairing partially online course offerings and to identify central, proctored lab space for online exam offerings.

9. Identify clusters of adjacent small rooms that might be combined and reconstructed into larger teaching spaces.

   Policy implementation: Summer 2008
   Staff responsible: Facilities’ planners & architects, ARR, department chairs and scheduling staff.

10. Maintaining and developing additional classroom space will be the highest priority in capital planning.

    Policy implementation: 2008-2009
    Staff responsible: FADM and executive committee

Assessment

Many of these policies take effect immediately. Each of them will be assessed at least annually to ensure that they remain effective and appropriate.
Cross-listing Policy

To: Deans, Chairs, Directors
FROM: Terrel L. Rhodes, Vice Provost for Curriculum
RE: Cross-listing Courses Policy Clarification
DATE: March, 2005

Since the adoption of a policy by the Faculty Senate in June 2000 on cross-listing courses, university curriculum committees have encountered recurring questions regarding when it is appropriate to cross-list courses. The easiest piece of the policy has been the elimination of cross-listing discrete numbered courses with omnibus numbered courses, and cross-listing omnibus courses with other omnibus courses. The more challenging part of the policy is cross-listing discrete courses with other discrete numbered courses.

The very first part of the policy recommendation adopted by the Senate clearly states that, “1. Continue the current practice of cross-listing discrete numbered courses that represent agreed upon and permanent, parallel courses between two departments or programs.” This clearly presupposes that each of the departments involved have a course that faculty in their unit teach on a regular basis, but that the course is essentially the same course offered by another department. The assumption would be that the departments involved would coordinate the offering of the courses so that the courses would not compete with each other but would provide alternating options for students needing the course.

Example:

- URBAN STUDIES AND PLANNING
  - PSY 342 001 Social Psychology (in Bulletin: “cross-listed with SOC 342”)
  - SOC 342 001 Social Psychology (in Bulletin: “cross-listed with PSY 342”)

A second part of the policy states, “2. Except as in #1 above, use a single departmental prefix for each course.” This section of the policy addresses the instances when a department decides that it would like its students to take a particular course, but they do not offer such a course through faculty employed in their unit. In these instances the existing course in the other department (with its prefix) would be listed as satisfying a requirement in that unit. Example:

- URBAN STUDIES & PLANNING
- COMMUNICATION
  - USP 457 001 Information Cities
  - USP 557 001 Information Cities
- USP 457 001 Information Cities
- USP 557 001 Information Cities

The University Curriculum Committee and the Graduate Council reiterate that this is the policy they will be following as they review course proposals.
Class Schedule Time Grid

Day Pattern (Before 1630)

<table>
<thead>
<tr>
<th>Credits</th>
<th>Meetings Per Week</th>
<th>Days</th>
<th>Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>1</td>
<td>M/T/W/R/F</td>
<td>1730-2110</td>
</tr>
<tr>
<td>4</td>
<td>2</td>
<td>MW or TR</td>
<td>1640-1830 or 1840-2030</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>M/T/W/R/F</td>
<td>1600-1830 or 1840-2120</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>MW or TR</td>
<td>1715-1830 or 1840-1955</td>
</tr>
</tbody>
</table>

Evening Pattern (Classes starting at 1600 or later)

<table>
<thead>
<tr>
<th>Time Slot</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td>0745-0850</td>
<td>0815-1005 (Alternate)</td>
<td>0800-0950</td>
<td>0815-1005 (Alternate)</td>
<td>0800-0950</td>
<td>0745-0850</td>
</tr>
<tr>
<td>0900-1005</td>
<td>0900-1005</td>
<td>0900-1005</td>
<td>0900-1005</td>
<td>0900-1005</td>
<td>0900-1005</td>
</tr>
<tr>
<td>1015-1120</td>
<td>1015-1120</td>
<td>1015-1120</td>
<td>1000-1150</td>
<td>1015-1120</td>
<td>1015-1120</td>
</tr>
<tr>
<td>1130-1235</td>
<td>1130-1235</td>
<td>1130-1235</td>
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<tr>
<td>1245-1350</td>
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<tr>
<td>1400-1505</td>
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<td>1400-1550</td>
<td>1400-1550</td>
</tr>
<tr>
<td>1515-1620</td>
<td>1515-1620</td>
<td>1515-1620</td>
<td>1515-1620</td>
<td>1515-1620</td>
<td>1515-1620</td>
</tr>
</tbody>
</table>
Scheduling Process

Banner Access Request (RBAR)

The role-based access request (RBAR) is the current way to request access for Student Information (SIS). In order to access the screens in Banner that are helpful for scheduling, you will need to request access using BanWeb. Before you can request access, you must already have a PSU ID number and an ODIN user name.

1. Log in to the PSU Information System (banweb.pdx.edu).
2. Select System Access Menu.
4. Under the “Tell us about the access you need…” area, click on the Banner tab.
5. Now select the Student tab on the left side. You will need to check the box indicating that you have completed the FERPA tutorial to continue with your request.
6. Check the box next to “General Student Query.”
7. Under Other Banner Student Access, add BAN_SIS_ROOMSCHEDULE_C.
8. In the “Why do you need this access?” area, enter a reason for the request: Need access for department scheduling.
9. At the bottom of the screen under “Who should approve this request?” select your direct supervisor or their supervisor if your direct supervisor is not on the drop-down menu.
10. Click on the Submit button.
Draft Processing

Instructions

Academic Scheduling will email you a copy of your draft. The format is an excel spreadsheet. The first thing you will need to do is open the excel spreadsheet and ‘Save As.’ Once the file is saved on your computer, you can begin making your edits.

Adding a New Section

1. Select the next available empty row in your spreadsheet.
2. Enter an ‘A’ in the cell of the first column to indicate that you are adding a new section.
3. If the new section is part of a cross listed pair, enter the CRN(s) of the corresponding crosslisted pair in the column titled ‘New Xlst?’ If the corresponding crosslisted pair is new and therefore does not have a CRN yet, enter the ‘Subject-Course #-Section’ in the cell.
   - EXAMPLE: If you are adding two new sections that should be crosslisted (such as HST 410/510), the 410 should read ‘HST 510 001’ in the ‘New Xlst?’ column and the 510 should read ‘HST 410 001.’
4. Leave the CRN cell blank, our office will generate the CRN once we add the section in Banner.
5. Enter the subject, course number, section number and approved title for the course.
6. Enter all of the additional course details in their corresponding cells.
7. Save your changes.

Changing an Existing Section

1. Select the row of the existing section that you are going to change.
2. Enter a ‘C’ in the cell of the first column to indicate that you are making a change to an existing section.
3. Make your change(s) to the corresponding cell(s).
4. Highlight any cells that you change in yellow and change the text font color to red! This is how we know a change has been made – we only process the highlighted cells.
5. Save your changes.

IMPORTANT REMINDER: Do not make a change to the course number of an existing section. We are unable to change the course number in Banner; a new CRN must be generated. Delete the course and add it with the new course number.

Deleting an Existing Section

1. Select the row of the existing section that you are going to delete.
2. Enter a ‘D’ in the cell of the first column to indicate that you are deleting a section.
3. Save your changes.

Updating Footnotes

1. Navigate to the second tab in the Draft workbook for the footnote listings.
2. To change or remove a footnote for an existing section, edit the text in the cell and highlight the cell yellow.
3. Footnotes for sections being deleted will automatically be removed with the course. No action is needed.
4. If adding a new section, start a new row at the bottom of the data in the footnotes worksheet. Enter the subject, course number and section number. Then add the footnote text and highlight the cell yellow.

**Submitting Your Completed Draft**

When you have completed your draft edits, attach the file to an email and send to ARRScheduling@pdx.edu. Only return the header document if you have made changes to it. Please make sure that changes to the header are highlighted in yellow and the text font changed to red.

**Tips for Avoiding Common Mistakes**

**Changing a course number**

You cannot make a change to the course number (column F) of an existing section. We are unable to edit the course number field in Banner; a new CRN must be generated. Instead you should use Excel’s copy-paste functionality to copy the row of the existing section and paste it at the bottom of your spreadsheet as a new section. The existing section should be deleted (‘D’ in the cell of the first column) and the new section added (‘A’ in the cell of the first column) and the CRN removed.

**New Xlist? Column**

Please do not put a ‘Y’ here. Please put the subject, course number and section or CRN if available of the crosslisted course here.

Please do not crosslist omnibus courses with discrete courses. Refer to the Cross List Policy in this document and/or the Curriculum tab on our website for more information.

**Adding blank rows**

Please do not add blank rows, or if you do, please be sure to remove them before you submit your draft. Blank rows cause problems with filtering when we are processing the drafts and may result in us missing information on the draft.

**Prerequisites**

Prerequisites do not go on the draft. If you have questions regarding prerequisites, please check the SCAPREQ screen in Banner or refer to the Bulletin for current prerequisite listings.

**Dept Approval**

Please put a ‘Y’ in the Dept Apprvl? column for courses that require departmental approval. Please do not list departmental approval in the attribute or restriction columns.
Partial Term Meetings

If a course is meeting part of a term instead of the full term, (i.e. a weekend course), please be sure to list the individual meeting dates in the Multiple Dates (Partial Term Only) column. Please do not list ‘meets every other week,’ or ‘meets first day of the term only.’ Please list each meeting date, i.e. 9/26, 10/10, 10/24, etc. Be sure to include the meeting dates in the footnote.

Excel Tips

Excel Language

Cell: In any spreadsheet program such as Excel, each rectangular box is referred to as a cell. A cell is the intersection point of a column and a row. Data entered into an Excel spreadsheet is entered into a cell.

Columns: Columns run vertically in a spreadsheet and help to identify the location of data. Each column is identified by a letter in the column header.

Column Header: The column header is the grayish-colored row containing the letters used to identify each column in the worksheet. The column header is located above row 1 in the worksheet.

Rows: Rows run horizontally in an Excel worksheet. They are identified by a number in the row header.

Row Header: The row header is the grayish-colored column containing the numbers used to identify each row in the worksheet. The row header is located to the left of column 1 in the worksheet.

Spreadsheet: A spreadsheet is a table used to store various types of data. The data is arranged in rows and columns to make it easier to store, organize, and analyze information.

Workbook: A workbook is a spreadsheet file with one or more worksheets.

Worksheet: A worksheet is a single page or sheet in an Excel workbook.

Moving Around Excel

To move around Excel, you can use your mouse and/or your keyboard keys.

<table>
<thead>
<tr>
<th>Keyboard Keys</th>
<th>Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab or Right Arrow</td>
<td>Moves one cell to the right</td>
</tr>
<tr>
<td>Shift-Tab or Left Arrow</td>
<td>Moves one cell to the left</td>
</tr>
<tr>
<td>Up Arrow</td>
<td>Moves one cell up</td>
</tr>
<tr>
<td>Down Arrow or Enter</td>
<td>Moves one cell down</td>
</tr>
<tr>
<td>Page Up</td>
<td>Moves up one screen</td>
</tr>
<tr>
<td>Page Down</td>
<td>Moves down one screen</td>
</tr>
<tr>
<td>Home</td>
<td>Moves to the first cell of the current row</td>
</tr>
<tr>
<td>Ctrl-Home</td>
<td>Moves to the first cell of the worksheet</td>
</tr>
<tr>
<td>Ctrl-End</td>
<td>Moves to the last cell of the worksheet</td>
</tr>
</tbody>
</table>
Entering Data

To enter data into an Excel spreadsheet, first click on the cell where you want to add the data and then enter the data. Once you have completed typing your data in that specific cell, you can either ‘Tab’ to move to the next cell to the right, ‘Enter’ to move to the next cell down, or click on a new cell with your mouse.

Highlighting and Changing Font Color

The easiest way to highlight and change a font color for a cell or group of cells is to use the Fill and Text Color icons on the Formatting toolbar. The Formatting toolbar is typically displayed at the top of the Excel window. If you don’t see it, go to View-Toolbars-Formatting to select the toolbar.

Filter

You can filter data on a spreadsheet by column heading. Highlight row 1 or the row with the column headings. Select Data-Filter. This will apply a filter option for each column. Clicking on a filter arrow will show the data that is in that column that can be selected. Using the draft as an example, some of the ways you can filter courses are by instructor, meeting time or course number.
Course Section Maintenance (CSM) Forms

Overview

Please download the fillable PDF CSM form from our website to ensure you are using the most recent edition.

A CSM is not required for the following actions:

- Room change request
- Instructor change
- Add/Remove WIC or CBL designation
- Section number change
- Add/Remove Department Approval
- Enrollment cap change
- Waitlist cap change

A change CSM is required for the following actions:

- Schedule type change
- Grade mode change
- Fee change (*cannot add fees after the first day of the term)
- Add/Remove course restriction(s)
- Reducing class meeting times
- Reducing class meeting days

A set of cancel and add CSMs (for each CRN) are required for the following actions:

- Credit hour change
- Instructional method change
- Title change
- Adding class meeting days
- Increasing or changing class meeting times
- Location change to/from Off-Campus
- Course number change
- Campus code change

Adding a Course

To add a new course, we must have the following information on the CSM:

- **Required Sections:** A, B, and C
- **Optional Fields:** Footnotes, Restrictions, Fees, and Notes
Changing an Existing Course

To make a change to a course, we must have the following information on the CSM:

- **Required Sections:** A, and all items being changed
- **Optional Sections:** B, C, and D

Please describe your change(s) in the ‘Notes’ section on the CSM and/or highlight what needs to be changed.

Canceling an Existing Course

To cancel a course, we must have the following information on the CSM:

- **Required Section:** A and all items being changed (leave blank anything in sections B-D that is not being changed)

Submitting Completed CSM Forms

Send CSM’s via email to ARRScheduling@pdx.edu.

Detailed CSM Form Field Descriptions

The following two pages provide detailed definitions for each of the fields on the CSM form.
<table>
<thead>
<tr>
<th>FORM SECTION</th>
<th>TITLE OF FORM FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| **ACTION**   | This is where you select if you are going to Add, Change or Cancel a course:  
  - Add will generate a new CRN for the course.  
  - Change (for existing CRNS) for schedule type, grade mode, fee change, course restrictions, reduction of meeting days/times.  
  - Cancel a class. You only need to select the Cancel action and fill out the Course Details. |
| **YEAR, TERM** | Enter the year and term. For example: 2015 and Winter |
| **SUBJECT**   | Enter a subject code (i.e. ANTH) |
| **COURSE #**  | Enter a course number (see your approved Courses in the PSU Catalog/Bulletin) |
| **SECTION #** | Enter the 3-character section number you would like (Note: if you have multiple sections of the course number the section number has to be unique (for example, 001, 002, 003 etc.) If you do not choose one, the next number in the series will be chosen for you. |
| **CRN**       | Enter the CRN if you are requiring action to an existing CRN. If the class is new, PLEASE LEAVE THIS SPACE BLANK. |
| **CREDITS**   | Enter the number of credits that the course will be offered for. Credit ranges for courses are pre-determined and approved at the catalog level. |
| **COURSE TITLE** | Enter the approved course title here. There is a 30 character limit for this field, including spaces, punctuation and prefixes (TOP:, SEM:, SPST:, etc. as applicable). See the Bulletin for approved titles. |

| **CAMPUS CODE** | This field is associated with billing. Enter the campus code for the course. Traditional billing in-load courses are "I." |
| **INSTRUCTIONAL METHOD** |  
  - **WEB (Fully On-line):** A fully on-line course taught asynchronously via the Internet. Students are not required to come to campus to complete this course and a classroom is not scheduled for this course, nor are meeting times published in the schedule of classes.  
  - **Hybrid:** A web-enhanced course with reduced classroom meetings and a significant amount of the course content presented via the Internet. Some classroom meetings are required and rooms should be scheduled accordingly with partial meeting dates included if applicable.  
  - **Restricted Differential Tuition:** Restricted Differential Tuition courses will have a unique Alpha code that is specific to their College. This information would be given to you by the Office of the Registrar upon RDT approval. |
| **GRADE MODES** |  
  - **A-F only:** Please check here if the class is to be offered as graded ONLY.  
  - **P/NP only:** Please check here if the class is to be offered as pass/no pass ONLY.  
  - **Optional:** A-F or P/NP: Please check here if a student can choose graded or pass/no pass.  
  - **Audit only:** Please check here if class is to be offered as Audit ONLY. Only OAA approved sections can be set up for Audit only registration. Students may register as audit for any section. Please see the schedule of classes for more information  
  - **In-Progress:** This grade mode is restricted to special multi-term courses approved through OAA. |
| **PUBLICATION STATUS** |  
  - **“Print”** will allow the CRN to be advertised in the online Schedule of Classes  
  - **“No-Print”** will restrict the CRN from being advertised in the online Schedule of Classes |
| **DEPT APPROVAL** | Check this box if you do not want students to be able to enroll in the class without dept/instructor approval. |
| **CLASS SIZE** |  
  - **Section Cap:** Please enter the section cap size.  
  - **Waitlist:** Please enter the waitlist cap size for this section. |
<p>| <strong>CROSS-LIST INFORMATION</strong> | Enter the class that you want to cross-list the course with. ALWAYS cross-list sections that are meeting together, if this doesn’t happen classes may be placed in different rooms and it can cause problems with registration. Fill out this section with the Subject, Course, Section &amp; CRN of the other section(s) you wish to cross-list your course with. BE SURE TO INCLUDE THE GLOBAL CROSS-LIST CAP SIZE. See the cross listing policy section of this document or our curriculum page on our website for more details. |
| <strong>INSTRUCTOR INFORMATION</strong> | Check the primary instructor and include their PSU ID number. Enter “Staff” if an instructor name is not currently known. Instructors WILL NOT be added to the class without the correct PSU ID number. |
| <strong>FOOTNOTES</strong> | Choose if the course will be Fully Online, Hybrid, and/or RDT...this will let us know to enter the corresponding footnote text. You can also enter your own additional custom footnote text. |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>MEETING TIMES/DAYS</th>
<th>Please fill out using military time (i.e. enter 1300 for 1:00pm). See the class schedule time grid section in this document or on our classroom scheduling page of our website. Enter TBA if the meeting days and times are to be entered at a later date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARTIAL TERM DATES</td>
<td>If a class is meeting only a few days during the term, please enter those dates here (i.e. 7/15, 8/4, 9/2). If the class is meeting the whole term, please leave this space blank. Always be sure to include a footnote for classes that meet partial term.</td>
<td></td>
</tr>
<tr>
<td>PART OF TERM CODE</td>
<td>Parts of term are valid for Summer Session only. Part of term codes can be found on the summer page of our website.</td>
<td></td>
</tr>
</tbody>
</table>
| LOCATION DETAILS | - **For new classes:** You can only assign rooms that are in your departmental control, otherwise leave this field blank.  
- **For General Pool (RO) Rooms:** Choose this if you would like us to find a general pool room for this course.  
- **For Specialty Rooms:** Choose this if you need a computer lab or distance learning classroom.  
- **For a room change:** Enter the reason for the change in the “Reason for room change” area and preferences (if any)  
- **For OFFCAM:** Please be sure to list the off campus location information in the footnote. |
| RO ROOM ATTRIBUTES | Indicate only those room attributes that are required; numerous attributes may decrease your chances of getting a room. |
| Section | RESTRICT ENROLLMENT TO | This area allows you to restrict your class to majors/minors, student attributes, college codes, and/or class restrictions. Indicate your majors/minors with an alpha code, your college with a two digit numeric code, and your class restrictions by checking the appropriate boxes. |
| FEES | Enter fee codes and corresponding fees, if applicable. **NOTE:** Fees cannot be added once the term starts. |
| COURSE ATTRIBUTES | **CBL** (community-based learning) = A type of course that explicitly engages students in addressing community issues in order to increase students’ understanding and application of academic content. Examples include course-embedded service-learning, field experiences, capstones, and other community engagement and/or research projects. Contact OAA at 5-3422 for questions concerning CBL.  
Include Program Attribute(s) if applicable. |
| Section | NOTES | This area is for comments if you have additional information or need to explain something further. If you want students moved over from the old CRN to the new CRN, please list that information here. |
| DEPARTMENT INFORMATION | Be sure to include your name, phone extension, and date. |
Ad Hoc Room Requests

Often you will find that it is necessary to request rooms for activities that may or may not be related to a credit bearing course. Whether or not the request should be scheduled through Academic Scheduling or Conferences & Events is based on the activity not the room. This document is intended to clarify the process for requesting rooms on campus for academic ad hocs and to explain the difference between academic ad hoc requests versus event requests (non-academic events). Room requests are broken into two categories: Academic ad hocs and non-academic ad hocs.

**Academic Ad Hocs**

Academic Scheduling only accepts academic ad hoc requests that are directly related to CRNs/classes. This includes CRN/class-related requests such as the following:

- Breakout rooms/sessions
- Study sessions
- Student presentations
- Thesis presentations
- Makeup sessions
- Alternate exam rooms
- Academic ad hocs are to be submitted via e-mail and are processed after the second week of the term.

Your e-mail request should include the following information: the CRN(s) the ad hoc is related to, date, time (start and end), room size needed, and any special room needs or bldg/room preference. Please include "Ad Hoc Request" and the ad hoc title in the subject line of your e-mail. This enables us to process your request in a timely and efficient manner. Here is an example of the request format.

- (Subject Line of Email):  Ad Hoc Request - ED 410 Study Session
  - CRN: 45556
  - Date: 2/15/05
  - Time: 1300-1500
  - Size: 25 people
  - Special needs: tables and chairs

In Banner and DataMASTER, ad hocs will appear as TEMP in the subject section. This is a placeholder for these ad hocs and helps us reduce the possibility of double booking classrooms.

**Non-Academic Events**

Events which are not related directly to a class are processed through Conferences & Events located in SMSU. To schedule an event, please contact Conferences & Events at 503.725.2663 or schedule online using their Online Event Request Form. This includes event requests for general pool classrooms. The following are examples of non-CRN/class-related events:

- Staff meetings
- Club meetings
- Conferences
- Workshops
- Faculty Interviews
- Public lectures/speakers open to the community
Banner Screens

Overview of Academic Scheduling BANNER Screens

This is intended to familiarize you with Banner screens that are specific to scheduling. It includes basic descriptions of commonly used screens and directions on how to perform particular searches for course information listed in Banner. This document assumes that you have a basic knowledge of Banner.

As a scheduler, you have view-only access to the screens included in this document. Any additions/edits to the course data in Banner should be submitted to the Academic Scheduling office in accordance with University scheduling policies.

The content for the schedule of classes originates from the data in Banner. When information is entered into Banner, it is accessible instantly via the PSU Information System (including online registration and faculty web access). Each evening, the information from Banner is updated in DataMaster causing a 24-hour delay from one system to the other.

Banner Navigation Tools

<Control><Page Down>: Allows you to navigate through the pages of a given form.

The “Option” Menu: This menu is located at the top of all Banner screens and lists additional available forms and screens.

<Shift><F7>: This key combination allows you to get back to the very top of the form you are working in.

The arrow-down button allows you to view all available options for a given field.

The rollback button is used when you want to clear the current query and begin a new one.
**Banner Screens**

**SCACRSE – Catalog Level Information**

The SCACRSE screen is used to add newly approved courses to Banner at the catalog level. The course information in SCACRSE is the basis for building a section in SSASECT. When CSM’s are submitted to the scheduling office, classes for a particular term are entered in SSASECT, but the default information is pulled from SCACRSE.

**SCACRSE – 1st Screen: Basic Course Information**

![SCACRSE Screen 1](image1)

**SCACRSE field definitions:**

- **Subject:** The subject area the course is offered in.
- **Course:** The approved course number. Note: A University Studies cluster course will have a “U” in this field after the 3-digit course number.
- **College:** The college the course is being offered by.
- **Department:** The department within the college that is offering the course.
- **Status:** Indicates if the course is active and still being used.
- **Approval:** Indicates if the course is approved for a degree.
- **Credit:** Shows the number of approved credit hours for the course.

**SCACRSE – 2nd Screen: Course Level**

![SCACRSE Screen 2](image2)
- **Course level:** This page indicates the approved level for the course, e.g. “UG” – Undergraduate.

**SCACRSE – 3rd Screen: Grade Mode**

<table>
<thead>
<tr>
<th>From Term</th>
<th>Copy</th>
<th>To Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>18S203</td>
<td></td>
<td>999999</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grade Mode</th>
<th>Description</th>
<th>Default</th>
<th>Not Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Graded Mode (A-F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Pass/NoPass Grading Mode</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Grade mode:** This page indicates the approved grading mode for the course, e.g. “G” – A-F only.

**SCACRSE – 4th Screen: Schedule Type**

- **Schedule Type:** This page indicates the approved schedule types for the course. Starting Fall 2013, the Schedule Type field is now used solely for coding of pedagogy/learning methodology such as Lecture, Seminar, Research, Lab, etc.

**Schedule Type SCACRSE 0.4.0.2 (appd):**

<table>
<thead>
<tr>
<th>Schedule Type</th>
<th>Description</th>
<th>Instructional Method</th>
<th>Description</th>
<th>Workload</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Community Based Learning</td>
<td></td>
<td></td>
<td>4.000</td>
</tr>
<tr>
<td>L</td>
<td>Lecture</td>
<td></td>
<td></td>
<td>4.000</td>
</tr>
<tr>
<td>T</td>
<td>Televised Distance Learning</td>
<td></td>
<td></td>
<td>4.000</td>
</tr>
<tr>
<td>U</td>
<td>Partially Online Courses</td>
<td></td>
<td></td>
<td>4.000</td>
</tr>
<tr>
<td>V</td>
<td>Fully Online Courses</td>
<td></td>
<td></td>
<td>4.000</td>
</tr>
</tbody>
</table>

**SSASECT – Section Level Information**

The SSASECT screen is used by the Academic Scheduling Office to add classes for a given term to Banner at the section level. The basis for the information in SSASECT comes from what was originally entered into SCACRSE. When CSM’s and drafts are submitted to the Academic Scheduling Office, this is the screen used to enter those classes.
SSASECT Field Definitions:

- **Course number**: The approved course number. Note: A University Studies cluster course will have a “U” in this field after the 3-digit course number.
- **Cross List**: If there is a code in this field, it means it is cross-listed with one or more sections. Check out the “Cross list Definitions” screen on the options menu for the complete enrollment information for the cross-listed sections.
- **Campus code**: Sections with traditional billing are listed with an “I.” Special programs may be designated with a code other than “I.”
- **Status**: Indicates the status of the section, i.e. “A” – active, “C” – cancelled and “I” – inactive.
- **Schedule Type**: Indicates the type of course, e.g. “L” (lecture) or “B” (lab).
- **Grade mode**: Indicates the grade mode for the section, i.e. “G” – Graded, “P” – Pass/No Pass, “A” – Audit, “B” – In Progress, and blank – Optional. Using the button will allow you to see the grading options available for the section.
- **Special Approval**: “DP” in this field indicates that the department/instructor must sign a Special Registration Form in order for the student to enroll in the section. Your department can use SFASRPO (the department override feature in Banner) to allow specific students to enroll in courses with DP restriction.
- **Credit Hours**: Shows the number of approved credit hours for the section.
- **Print/Voice Response Check boxes**: If the “Print” and “Voice Response and Self-Service Available” boxes are not checked, this section cannot be viewed by students in the online schedule or in Banweb. However, a student can still register for the section in Banweb if they know the CRN.

SSASECT – 2nd Screen: Section Enrollment Information

- **Maximum**: This is the section size of the course.
- **Actual**: This is the number of students currently registered for the course.
- **Remaining**: This is how many spots are available for students to register.
- **Waitlist Maximum**: This is the waitlist size.
- **Waitlist Actual**: This is the number of students currently on the waitlist.
- **Waitlist Remaining**: This is how many spots are available on the waitlist.

<table>
<thead>
<tr>
<th>Course Section Information</th>
<th>Section Enrollment Information</th>
<th>Meeting Times and Instructor</th>
<th>Section Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enrollment Details</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum: 35</td>
<td>Waitlist Maximum: 0</td>
<td>Projected: 0</td>
<td></td>
</tr>
<tr>
<td>Actual: 23</td>
<td>Waitlist Actual: 0</td>
<td>Prior: 0</td>
<td>Reserved</td>
</tr>
<tr>
<td>Remaining: 12</td>
<td>Waitlist Remaining: 0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SSASECT – 3rd Screen (Top Block): Class Meeting Information**

- **Class meeting times**: This screen shows the meeting times and dates for the section. This screen also will show the building and room if you tab over to Meeting Location.

<table>
<thead>
<tr>
<th>Meeting Date</th>
<th>Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CLAS</td>
<td>01-APR-2013</td>
<td>15-JUN-2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SSASECT – 3rd Screen (Bottom Block): Instructor Information**

- **Instructors**: This screen shows the instructors assigned to the section. Alternate graders are added as 0% responsibility.

<table>
<thead>
<tr>
<th>Instructor ID</th>
<th>Name</th>
<th>Instructional Hours</th>
<th>Percent of Responsibility</th>
<th>Primary Indicator</th>
<th>Override Indicator</th>
<th>Percent of Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Johnson, Patrick</td>
<td>1.608</td>
<td>50</td>
<td></td>
<td></td>
<td>50</td>
</tr>
<tr>
<td>01</td>
<td>Holmberg-Hedenberg, Susan</td>
<td>1.608</td>
<td>50</td>
<td></td>
<td></td>
<td>50</td>
</tr>
</tbody>
</table>

**SSAXLST – Cross List Definition Screen**

This screen shows the sections cross-listed under a specific cross-list code.

To display the sections for a given cross-list code, enter the term code and the cross-list code. Hit <Ctrl><Page Down>.

You will be able to see the individual enrollments for each section and the overall maximum enrollment for the class. Once registration opens, this screen will reflect the individual enrollment for each section and the overall class enrollment.
SIAASGQ – Faculty Schedule Screen

This screen displays the class schedule for an instructor.

To view an instructor’s schedule, from the main screen in Banner enter SIAASGQ and enter the term code and instructor’s ID. Hit <Ctrl><Page Down>.

SSASECQ – Banner CRN Search

1. Go to SSASECQ in the main screen of Banner.
2. Enter the term (e.g. 201104 for Fall 2011)
3. Enter the subject (i.e. ANTH)
4. Enter the course number (e.g. 101)
5. Enter the section code if you have it.
6. Either hit F8 or from the menu bar (located at the top of the screen above the shortcut buttons), choose “Query” and then “Execute.” This will bring up the CRN for your queried selection.

7. If you would like to view the details of a specific CRN, go to “Options” on the menu bar and select “Course Section Information.” This will bring you to the SSASECT screen with the term code and CRN in place.
8. Hit <Ctrl><Page Down>. At this point, you should be able to view your section information.
9. If you hit <Ctrl><Page Down> again, you will be able to view the enrollment details. <Ctrl><Page Down> to see the
meeting time/day/building/room information and instructor information.

NOTE: SSASECQ can be used to search for classes using any combination of filters. For example, you can remove the term
field and enter just the subject and course number to pull up every section of the course for all terms in Banner.

**SLQMEET – Banner Room Search**

1. Go to SSASECT in the main screen of Banner.
2. Enter the term (e.g. 201304 for Fall 2013) and the CRN.
3. Hit <Ctrl><Page Down>. At this point, you should be able to view the course section information.
4. If you hit <Ctrl><Page Down> again, you can view the enrollment details and then hit <Ctrl><Page Down> once more
to see the meeting day/time information.
5. Once you are in the meeting times, from the menu bar choose “Options” and then “Query Available Class Room.” The
menu bar is located at the top of the screen above the shortcut buttons.

![Query Available Class Room](image)

6. Once you get to the SLQMEET screen, remove the building code and change the capacity if need be to whatever size
you are searching for. Note: You are now in query mode; this will not affect the actual Banner data.
7. Hit <Ctrl><Page Down>. To search for a general pool classroom, type ‘RO’ under “Attribute.” For a list of all
searchable attributes, click on the arrow underneath Attribute.

![Available Class Room Query](image)

8. Hit <Ctrl><Page Down> again.
9. A list will appear showing all available general pool classrooms. You can scroll down using the right-hand scroll bar.
SFASPRO – Registration Permit Overrides

This screen allows departments to override course restrictions or registration errors in BANNER to aid students with future registration online. Once the override has been entered, students may add previously restricted courses through BanWeb. To override a restriction, pre-requisite, co-requisite, time-conflict, or department approval, you will need to go to the BANNER screen SFASRPO.

1. Enter the student ID and term, then <cntl> + page down
2. Enter the permit override code (see list below or click on the icon in Banner to see the list)
3. Enter course details
   a. To override a specific section of a course, enter just the CRN
   b. To override all sections of a course, enter the subject and course number
4. Save (F10 or File->Save)
   a. To remove a permit or override code, Shift+F6, then save (F10 or File>Save).

Permit and Override Codes

- APPR – Department Approval
- CORQ – Co-requisite
- PREQ – Pre-requisite
- RSTR – Major/Minor Code, College Code, Class Level
- TIME – Time Conflict
- ATTR – Student Attribute Code
DataMaster

Requesting Access

Department Schedulers can request access for DataMaster through the System Access Menu in Banweb. Please note, you will want to check both the General and Student checkboxes in the request. Detailed instructions for the access request can be found on OIT's DataMaster webpage.

Reports for Academic Scheduling

After your request for DataMaster access has been completed,

1. Log in to DataMaster (www.datamaster.pdx.edu).
2. Select the Academic Scheduling folder.
3. Select any of these reports:

<table>
<thead>
<tr>
<th>Name</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Classroom Schedules by Term - S0018</td>
<td>More...</td>
</tr>
<tr>
<td>Banner Classroom List - S0019</td>
<td>More...</td>
</tr>
<tr>
<td>Catalog Course Information - S0022</td>
<td>More...</td>
</tr>
<tr>
<td>Class Schedule PDF - S0066</td>
<td>More...</td>
</tr>
<tr>
<td>Classes Near Capacity - S0064</td>
<td>More...</td>
</tr>
<tr>
<td>Classroom Schedule - S0017</td>
<td>More...</td>
</tr>
<tr>
<td>Classroom Schedule Condensed - S0043</td>
<td>More...</td>
</tr>
<tr>
<td>Closed Classes - S0004</td>
<td>More...</td>
</tr>
<tr>
<td>Course History - S0041</td>
<td>More...</td>
</tr>
<tr>
<td>Course List with Enrollments - S0025</td>
<td>More...</td>
</tr>
<tr>
<td>Course List with Enrollments by Campus Code - S0033</td>
<td>More...</td>
</tr>
<tr>
<td>Crosslist Report - S0023</td>
<td>More...</td>
</tr>
<tr>
<td>Faculty Course Listing - S0001</td>
<td>More...</td>
</tr>
<tr>
<td>Faculty Course Listing by Department - S0042</td>
<td>More...</td>
</tr>
<tr>
<td>Footnote Text by CRN - S0062</td>
<td>More...</td>
</tr>
<tr>
<td>Low Enrollment - S0067</td>
<td>More...</td>
</tr>
<tr>
<td>New Course Offerings by Term - S0092</td>
<td>More...</td>
</tr>
<tr>
<td>Omnibus Numbered Course History - S0077</td>
<td>More...</td>
</tr>
<tr>
<td>Open Classes - S0003</td>
<td>More...</td>
</tr>
<tr>
<td>Term Fee Audit - S0020</td>
<td>More...</td>
</tr>
<tr>
<td>Time Spread Report - S0070</td>
<td>More...</td>
</tr>
<tr>
<td>Tuition and Fee Waiver Courses - S0055</td>
<td>More...</td>
</tr>
<tr>
<td>Unified Building List - S0115</td>
<td>More...</td>
</tr>
<tr>
<td>University Studies Course List - S0021</td>
<td>More...</td>
</tr>
</tbody>
</table>

Most commonly-used reports include: Course List with Enrollments, Classes Near Capacity, Closed Classes, Crosslist Report, Faculty Course Listing, Footnote Text by CRN, Low Enrollment, Open Classes, Time Spread Report.
Reports for Registration

1. Log in to DataMaster (www.datamaster.pdx.edu).
2. Select the Student folder.
3. Select the Registration folder.
4. Select any of these reports:

   Most commonly-used reports include Class Roster, Registration Counts, Student Schedule, and Students by Attribute.
How to Run Reports

Each report has required filters and many have several optional filters you can also select depending on your needs.

Some filters allow you to select multiple items in a list by holding down the control (CTRL) key while selecting all desired options.

When a report is finished generating, it will open as the HTML report in the browser window:

[Image of a course list with enrollments report]
The next section in this document details the export process and options.

**Exporting Reports to Various Formats**

Reports can be exported to the following file types:

- HTML
- PDF
- XML
- Excel (including 2007, 2002, and CSV format)

To export, click on the icon and choose the option you would like:

A separate dialogue box will pop up while the report runs. If you wait, the report will download and you can save or open from there.

You can choose to have the report e-mailed to you instead, which is often hand for large reports that take a while to generate. Click the “Select Delivery Method” option and input the e-mail address(es) the report should be sent to.
D2L (Desire 2 Learn Learning Management System)

Overview

Desire2Learn (D2L) is a web-based learning management system designed to create a rich online learning environment for students. D2L includes features such as an electronic dropbox for turning in assignments, an automated gradebook, discussion boards, and quizzes.

Tutorials

All courses automatically have a shell created in D2L. Instructors must activate their courses in order for students to see it in their course list. Visit https://pdxtutorials.uservoice.com/knowledgebase/articles/238508-activating-a-course for instructions.

Instructors can give another instructor or TA access to D2L. Visit https://pdxtutorials.uservoice.com/knowledgebase/articles/238509-adding-a-ta-another-instructor-or-a-student for instructions.

For more tutorials, please visit http://www.pdx.edu/psuonline/tutorials-and-help.

D2L Support

Course Development in D2L - OAI Faculty Support Desk

The Office of Academic Innovation office opened the Faculty Support Desk in the spring of 2015 to provide support service for PSU faculty, graduate student assistants, and guest faculty with their technology needs for courses. They provide assistance with D2L.

They can be reached at (503) 725-6624 or by submitting a request with their Online Support Request form.

D2L Troubleshooting - OIT Help Desk

The OIT Help Desk can help troubleshoot D2L issues such as a missing course shell.

They can be reached by phone at (503) 725-4357 (HELP), by e-mail, or in SMSU 018 (in the basement).
Ad Astra

Overview

Ad Astra is our web-based room scheduling software. Departments use Ad Astra to room courses in their departmentally controlled space, request general pool classrooms, assign preferences, request computer labs and request distance learning classrooms.

Rooming Timeline

Ad Astra opens for departments to room approximately 4 weeks after the draft deadline. Departments are given two weeks to complete their rooming.

Ad Astra Rooming Procedure

Getting Started

These instructions will allow a user to assign departmentally controlled rooms and/or shared rooms, request computer labs, request distance learning classrooms and assign features by section.

General Notes:

- Ad Astra works best with Internet Explorer
- All general pool classrooms are now high tech, so please do not select technology features
- Do not use the back arrow on the internet toolbar while in Ad Astra - use the back button inside of Ad Astra instead

To get started…

1. Login to Ad Astra (https://scheduling.pdx.edu/AstraSchedule/Portal/GuestPortal.aspx) with your ODIN credentials (the user name and password you use to log into your computer)
2. Click on the Academics tab
3. Click on Sections
4. Using the Filter search area, select the plus sign (+) to open the drop down menu. Now, select the subject and click the Search button at the very, very bottom. To filter the results further, the course can also be selected.
5. Click “Search” at the bottom of the filter search area to populate the sections in the “Section List” to the right of the filter bar:
6. In order to make any changes to sections, you MUST be in edit mode. There are two ways to do this.

i. In the Section List, click on the Course/Section which will open the details and you can click the “Edit button at the top of the screen.
ii. In the Section List, click on the pencil icon that corresponds with the preferred course. This opens up the Course/Section details in edit mode.

7. Once you have the course section open in edit mode, you with either (click to jump to appropriate instructions in this document):
   i. Assign a departmentally-controlled room
   ii. Request a general pool classroom
   iii. Request a computer lab
   iv. Request a Distance Learning Center (DLC) room

Assigning Departmentally Controlled Rooms

1. To assign a departmentally controlled or shared room, click the ‘House with Pencil’ button in the Meetings box.

   **Same Time Info**

<table>
<thead>
<tr>
<th>Meeting Type</th>
<th>Start Time</th>
<th>End Time</th>
<th>Days</th>
<th>Start Date</th>
<th>End Date</th>
<th>Instructor</th>
<th>Status</th>
<th>Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>2:00 PM</td>
<td>3:50 PM</td>
<td>MW</td>
<td>09/28/2015</td>
<td>12/28/2015</td>
<td>Hall, David</td>
<td>Scheduled</td>
<td>CN 150</td>
</tr>
</tbody>
</table>

2. The filters should be automatically set to list only the rooms your department has control of.
3. Select the room you want to assign by clicking on the “Available” next to it and it will turn green and the text will turn to “Selected.” Then Select ‘OK’ at the bottom of the screen. To un-select the room, you can just click on the green ‘Selected’ and it will remove it. Then click ‘Save.’ To remove a room you just assigned click on the icon of the house with the red dot and then save.
4. Click ‘Save’ on the course section to finalize and exit out of Edit mode.
5. The departmental room assignment will now show up in the Section List for confirmation.

### Requesting a General Pool Room

1. To request a general pool classroom, click on the pencil icon to the left of the meeting time once you have the section opened (using the Getting Started steps)

2. Scroll down to the “Preferences” section.
3. Click the Add button in the Room Type box.

4. Select “AAA-Classroom – General Pool”. Change the weight to 10 and choose ‘Required’ under ‘Mode.’

5. If you require/prefer certain room features (i.e. furniture, whiteboard, chalkboard), click the Add button in the “Features” box directly below the Room Type box. The default size for the menu is pretty small. If you would like it larger simply click and pull it wider to see all of the text. Choose the desired feature (i.e. Whiteboard) from the second drop-down menu under ‘Name’. Choose a weight of 10. If the feature is absolutely necessary, choose ‘Required’ under the Mode column. Leave it as ‘Normal’ if you have a preference, but not a dire need. To add another feature, click the Add button again. After adding all features, return to the top of the page and click the Save button. To remove a feature, click the red X icon next to the feature.

The only features available for general pool rooms are:

- Chalkboard
- Fixed Tables & Chairs
- Fixed Tablet-arm Chairs
- Moveable Tables & Chairs
- Moveable Tablet-arm Chairs
- Whiteboard
- Window
6. Once all Room Types and Features are entered, click Save at the top of the page. This will finalize the request and take the section out of Edit mode. Use the arrow button in the upper right of the Ad Astra page to navigate back to the complete Section List.

NOTE: If courses are crosslisted, the feature(s) only needs to be added to one course in the crosslisted pair.

**Requesting a Computer Lab (ICCH)**

To request a computer lab, follow the instructions for requesting a general pool room (items 1-5). Then add and select Computer Stations as a Feature, change the weight at 10 and choose ‘Required’ under ‘Mode.’ Save the request. Please also email your request (including preferred lab if applicable) to ARRScheduling@pdx.edu.

**Requesting a Distance Learning Center (DLC) Classroom**

To request a distance learning classroom, follow the instructions for requesting a general pool (items 1-5). Then add and select Distance Learning Technology as a Feature, change the weight at 10 and choose ‘Required’ under ‘Mode.’. Also please email your DLC room request to ARRScheduling@pdx.edu.
Course Planning Guide (CPG)

Overview

The online Course Planning Guide is a tool provided to assist students in projecting which courses will be available and help them plan their academic careers.

Logging In

1. Open your preferred web browser and navigate to the CPG Administration site (http://cpg.sa.pdx.edu/admin).
2. To log in, enter your ODIN credentials (the same username and password that you use to log into your computer).

Viewing Your Departmental Listings

1. Once you have logged into the administrative site, click on Add/Edit/Delete Courses under Course Administration.

Course Administration:

- Add/Edit/Delete Courses

2. Select the correct year: 2011-2012(H) and hit the Set button. *Please note, the (H) means that the year is hidden from the public site.

Select a year to browse: 2011-2012 (H)  Set

3. Click on your department. (The course listings from the previous year are rolled over).

Adding Courses

1. If you do not have any existing courses in your departmental listings, you will need to add your first course row by clicking on Add Course in the upper right-hand corner. This will create a new row. *MAKE SURE YOU ARE IN THE CORRECT YEAR BEFORE MAKING CHANGES.
2. Enter the course title by clicking in the box under the Course Title heading.
3. Enter the credit hours by clicking in the box under the Hours heading. Use a ‘-‘ when entering a range of credit hours (i.e. 1-4).
4. Enter the subject code and course number under the term(s) it will be offered.
5. Click enter and the save button will show up next to Add Course.
6. Click on the Save button to save all changes.
7. If you already have existing courses, you can use the “Insert” editing tools (arrows) to add additional course rows either before (up arrow) or after (down arrow) an existing course. *Please note, if you click on the Add Course button instead of the insert arrows, the new course will automatically be added to the top of your course listings.

Adding Special Icons

1. In the Icon Key section you will see that you have the option to add certain characters to your course numbers.
   a. * = Evening section(s) offered
   b. + = Offered in odd years
   c. ++ = Offered in even years
   d. ~ = Not offered regularly
   e. ^ = Fully or partially online course
   f. # = Off-campus section(s) offered
2. Add the icon(s) after the course number.

Editing Courses

1. Click in the box under the heading of what needs to be changed (i.e. Course Title).
2. Make your changes and select Save.
Re-arranging Courses

1. The Course Planning Guide allows you to adjust the order of your course rows by moving individual rows either up or down.
2. To move a course row, select the row and drag it to where you would like it to be.
3. Click on Save.

Dropping (Deleting) Courses

Click on the Scissors icon to remove a course row.

Editing Your Header Text

You can view your header by clicking on the ? icon under Courses Listing.

<table>
<thead>
<tr>
<th>Courses Listing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note: For up to date course offerings please refer to the PSU Class...</td>
</tr>
<tr>
<td>Course Title</td>
</tr>
</tbody>
</table>

To make edits to the header, from the admin menu:

1. From the admin menu, click on Edit Department Headings under Department Administration.
2. Click on the Edit button.
3. Make your changes in the box under Header.
4. Click on the Save button.

Deadlines & Timelines

Each year, prior to the start of Fall registration, an e-mail will be sent out to all Course Planning Guide contacts to let them know that it is time to create their departmental course listing for the new academic year. Course Planning Guide contacts should then log into the CPG Administrative Site (http://cpg.sa.pdx.edu/admin), to edit their course listings. The e-mail will include a deadline date for all initial updates.

The Course Planning Guide will go live on the CPG public site (http://cpg.sa.pdx.edu), on the same date that the Schedule of Classes is posted to the web for the first time for Fall. Once the Course Planning Guide is published online, you can add, edit and delete courses, but any changes that are made will be tracked and marked for students to see in the “Notices” column. Notice icons can be found in the icon key section at the top of the Course Planning Guide page. When courses are removed, they will have a strike through in addition to the Course entry removed icon.

For any questions, please email ARRScheduling@pdx.edu.
Contacts for Room Issues

Academic Rooming Issues (all terms)

For issues with any academic class scheduling issues, please contact the Academic Scheduling team:

- Adam Lutzow, Scheduling Supervisor  lutzow@pdx.edu, x4985
- Liz Adams, Scheduling Coordinator  elizaa@pdx.edu, x5501
- David Fletcher, Scheduling Assistant  flet2@pdx.edu, x5531
- Kirsten Hendrickson, Scheduling Assistant  khend2@pdx.edu, x3513

Academic Scheduling e-mail: ARRscheduling@pdx.edu

Event Room Needs (Non-academic)

For event room needs (non-academic uses) such as

- Scheduling non-academic events (events not connected to a CRN)
- Scheduling any rooms in Smith (SMSU)
- Any concerns with room needs related to a scheduled event

Please contact:

Conferences & Events
SMSU 435
(503) 725-2663
conferences@pdx.edu
http://www.pdx.edu/conferences

ICCH Computer Labs

For general computer lab questions or to request specific software installation in a computer lab for class, contact:

Instructional Technology Services
(503) 725-9104
icchroom@pdx.edu
https://www.pdx.edu/oit/classrooms

Technology/AV Equipment Needs

For technology and audio visual equipment needs such as:

- Technology training for faculty on specific rooms, as well as particular pieces of equipment
- Order technology for a classroom
- Order AV equipment: TV, VCR, DVD, Projector, etc.
- Find out if AV and/or tech equipment can be delivered to a specific classroom
- Problem with technology equipment in a classroom

Please contact:
Physical Building Issues

For physical building issues such as:

- Custodial & maintenance services
- Room temperature
- Broken facilities & fixtures
- Room cleaning
- Lighting
- Room layout
- Extra chairs
- Easels
- Podiums

Please contact:

Facilities & Planning
(503) 725-3738
https://www.pdx.edu/facilities/home

You can submit a work order request:

1. On their website at https://bedrock.psu.ds.pdx.edu/aim
2. Call (503) 725-2349 (2FIX)

Disability Room Issues

For questions regarding disability issues for students, please contact:

Disability Resource Center (DRC)
SMSU 116
TTY: (503) 725-6504
drc@pdx.edu
http://www.drc.pdx.edu

Campus access maps can be found at http://www.pdx.edu/floorplans/campus-map

Safety & After Hours Room Access

For any safety issues and/or after hours room access requests, please contact:

Campus Public Safety Office (CPSO)
SH 148
Non-Emergency: (503) 725-4407