

# Scheduling Helpful Hints

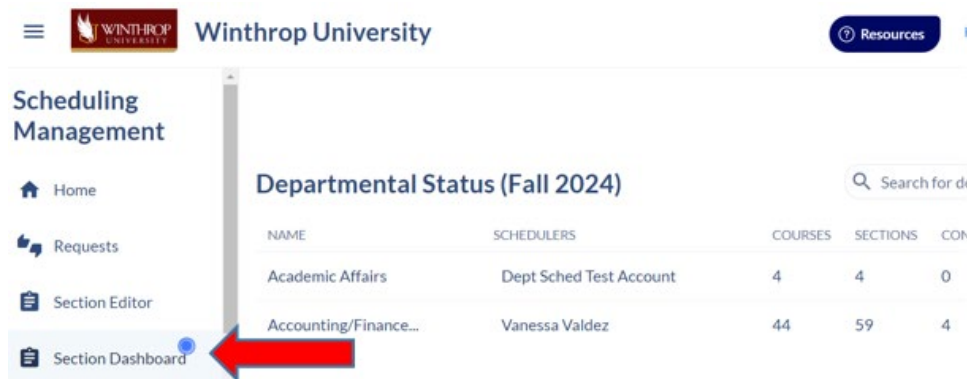
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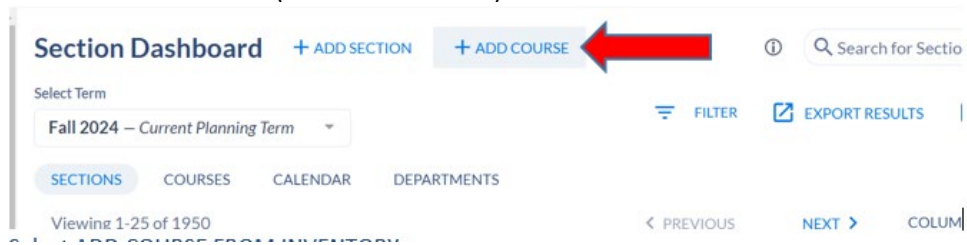
## Adding a course to the Section Dashboard

To add new courses to the Schedule Dashboard, follow these steps:

- 1) Click on **Section Dashboard**



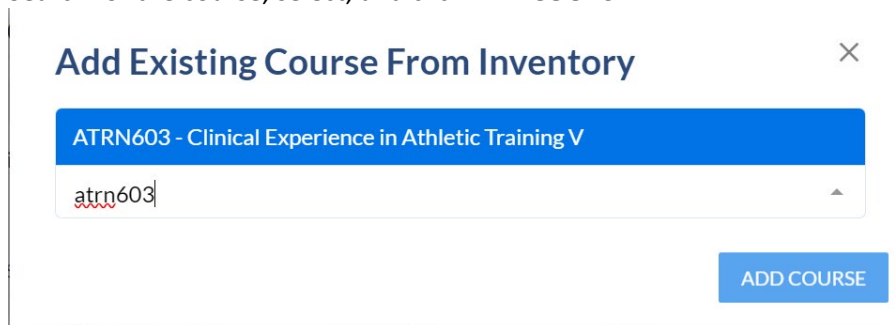
- 2) Click on **ADD COURSE** (not ADD SECTION).



- 3) Select **ADD COURSE FROM INVENTORY**



- 4) Search for the course, select, and click **ADD COURSE**.



5) Click on **COURSES**.

The screenshot shows the 'Section Dashboard' interface. At the top, there are buttons for '+ ADD SECTION' and '+ ADD COURSE'. A search bar contains the text 'Search for Courses...'. Below this, a 'Select Term' dropdown menu is set to 'Fall 2024 - Current Planning Term'. A 'FILTER' button is visible on the right. In the center, there are three tabs: 'SECTIONS', 'COURSES', and 'DEPARTMENTS'. The 'COURSES' tab is highlighted with a blue background and a red arrow points to it from the right. Below the tabs, it says 'Viewing 1-25 of 1244'. At the bottom right, there are navigation arrows for '< PREVIOUS' and 'NEXT >'.

6) Search for the course (ATRN603) and then select **ADD SECTION** to add a new section.


The screenshot shows the 'Section Dashboard' interface with a search bar containing 'atrn603' and a red arrow pointing to it from the right. The 'Select Term' dropdown is still set to 'Fall 2024 - Current Planning Term'. The 'FILTER' button is present. The tabs 'SECTIONS', 'COURSES', 'CALENDAR', and 'DEPARTMENTS' are visible, with 'COURSES' selected. Below the tabs, it says 'Viewing 1-1 of 1'. At the bottom right, there are navigation arrows for '< PREVIOUS' and 'NEXT >'. A table is displayed with the following columns: 'ACTIONS', 'COURSE CODE', 'COURSE NAME', 'SECTION COUNT', and 'DEPARTMENTS'. The table contains one row with the following data: 'ACTIONS' (containing a trash icon, a list icon, a refresh icon, and a '+ ADD SECTION' button with a red arrow pointing to it), 'COURSE CODE' (ATRN603), 'COURSE NAME' (Clin Exp in AT V), 'SECTION COUNT' (0), and 'DEPARTMENTS' (PE, Sport, & Human Performance).

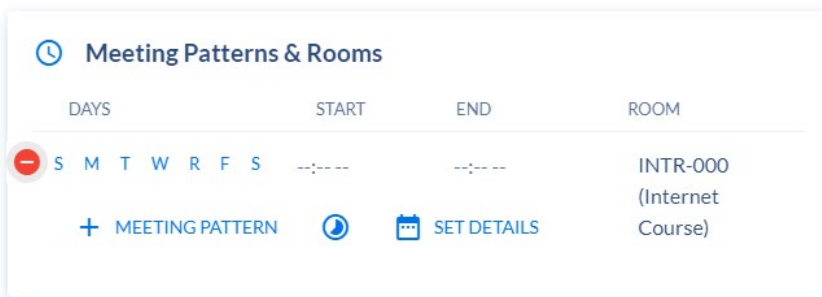
ACTIONS	COURSE CODE	COURSE NAME	SECTION COUNT	DEPARTMENTS
+ ADD SECTION	ATRN603	Clin Exp in AT V	0	PE, Sport, & Human Performance

## Canceling (NOT Deleting) a Section


Deleting a section in Coursedog does not play nice with Banner. It is a best practice to Cancel the section instead of deleting it.


**NOTE:** If there are any students enrolled in the class, you cannot cancel it in Coursedog. If registration has started, check Wingspan to see if anyone has registered (enrollment information in Coursedog is not real time). The process for canceling a class with enrollment should be: 1) change the Enrollment Capacity to zero in Coursedog so no new students register, 2) email the students enrolled to notify them of the class cancellation, and 3) email Academic Scheduling to drop the students and then cancel the class. We like to give students 24 hours' notice of the cancellation before dropping them from the class.

Before you can cancel the section, you need to remove any instructor(s) and meeting pattern(s). For the example below, even though there is no meeting time, there is still a meeting pattern. Hover over the area next to the S (for Sunday) until the  comes up, then click it to delete the meeting pattern.

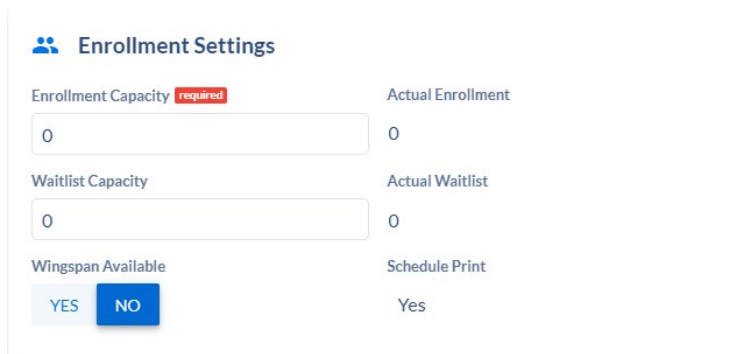


The screenshot shows the 'Meeting Patterns & Rooms' interface. It features a table with columns for DAYS, START, END, and ROOM. The first row shows a meeting pattern for Sunday (S) with a red minus icon next to it. Below the table are buttons for '+ MEETING PATTERN', a clock icon, and 'SET DETAILS'. The room listed is 'INTR-000 (Internet Course)'.

DAYS	START	END	ROOM
 S M T W R F S	--:--	--:--	INTR-000 (Internet Course)

[+ MEETING PATTERN](#)  [SET DETAILS](#)

Then on the Enrollment Settings card, change the Enrollment Capacity to zero and set Wingspan Available to NO. This will keep the class from showing up on the Course Offerings in Wingspan.



The screenshot shows the 'Enrollment Settings' interface. It includes input fields for Enrollment Capacity (set to 0), Waitlist Capacity (set to 0), and Actual Enrollment (0). There are also buttons for 'YES' and 'NO' under 'Wingspan Available', and a 'Schedule Print' option set to 'Yes'.

Enrollment Capacity <small>required</small>	Actual Enrollment
<input type="text" value="0"/>	0
Waitlist Capacity	Actual Waitlist
<input type="text" value="0"/>	0
Wingspan Available	Schedule Print
<input type="button" value="YES"/> <input checked="" type="button" value="NO"/>	Yes

Finally, scroll back up, change Section Status to Cancelled, and save.

Instruction Mode **required**

Online ▼

Part Of Term **required**

Summer C ▼

Start Date

Jun 6, 2022

Section Status 

Set Status ▲  
Active  
Inactive  
Cancelled

Jul 7, 2022



## Selecting an instructor not assigned to your department

If you want to select an instructor who may be assigned outside of the course's department, in the instructor dialog box, you can unselect the "Instructors from Design Department" (substitute whichever department you are working on for Design) field which will pull up all instructors. If you are still unable to find the instructor you are looking for, reach out to Records and Registration for help.

### Assign Instructor to VCOM392 - 001 ×

Instructors from Design Department  All Instructors

Filter By Instructor Type ▼

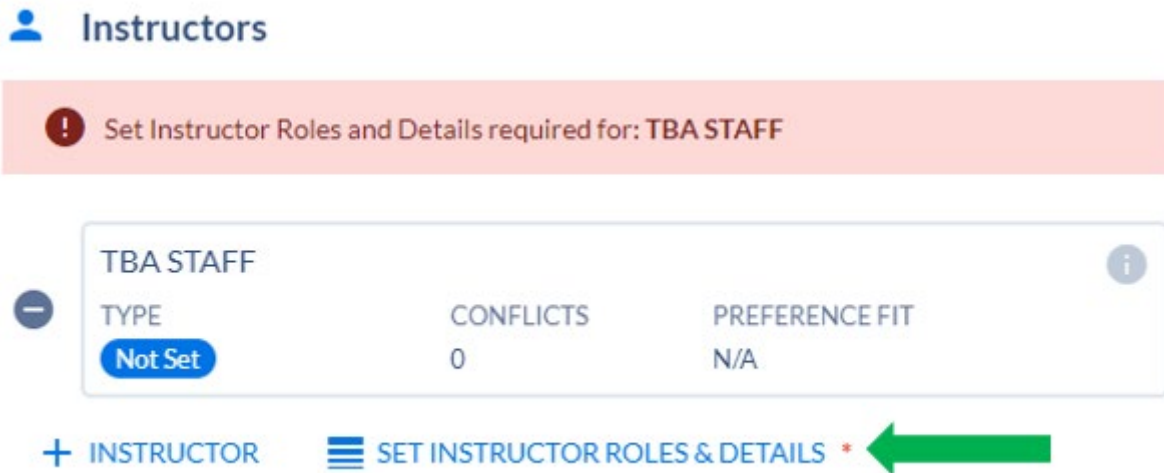
🔍 Start typing...

Viewing 1-25 of 1364 < PREVIOUS NEXT >

Kristen Abernathy <span>i</span>		
TYPE	CONFLICTS	PREFERENCE FIT
Associate Professor	0	100%

## Associating an Instructor with a Meeting Pattern (Resolving “Set Instructor Roles and Details” error)

Each instructor needs to be associated with a meeting pattern in order to be able to merge correctly into Banner. Here are some quick instructions, and again, there is more information in the Helpful Hints document linked above. If you see an error like the one below that says “Set Instructor Roles and Details required for:...” click on the SET INSTRUCTOR ROLES & DETAILS button.



The screenshot shows the 'Instructors' page. At the top, there is a red error banner that reads: 'Set Instructor Roles and Details required for: TBA STAFF'. Below this is a table with the following data:

TBA STAFF	CONFLICTS	PREFERENCE FIT
TYPE Not Set	0	N/A

Below the table, there are two buttons: '+ INSTRUCTOR' and '≡ SET INSTRUCTOR ROLES & DETAILS \*'. A green arrow points to the 'SET INSTRUCTOR ROLES & DETAILS \*' button.

Then you will click on the instructor for the class.



The screenshot shows the 'Set Instructor Roles & Details' dialog box. At the top, it says 'Set Instructor Roles & Details' with a close button (X) on the right. Below this, there is a dropdown menu showing 'TBA STAFF'. A green arrow points to the 'TBA STAFF' dropdown.

Finally, you should select the appropriate meeting time(s) under “Instr. Meeting” then SAVE this should resolve this error.



The screenshot shows the 'Set Instructor Roles & Details' dialog box. At the top, it says 'Set Instructor Roles & Details' with a close button (X) on the right. Below this, there is a dropdown menu showing 'TBA STAFF'. Underneath, there are several fields:

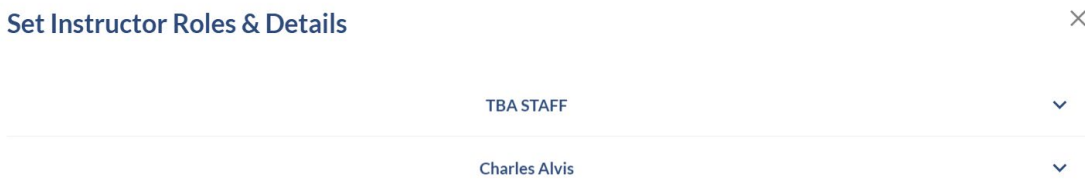
- Instr. Role: Set Instr. Role
- Instr. Meeting **required**: Set Instr. Meeting. A green arrow points to this field. Below it, a blue bar is selected with the text 'Mo 4:00 PM 5:15 PM'.
- Set Percent
- Instr. Workload

## Adding multiple instructors to a section

Coursedog allows you to add multiple instructors using the +INSTRUCTOR button on the Instructors card. Please make sure each instructor has the appropriate meeting pattern associated with it (see above). If you have multiple instructors, one instructor must be designated as primary and the total Instructor Percentage between all the instructors should add up to 100%. To adjust the role and percentage, click on SET INSTRUCTOR ROLES & DETAILS. Then, select the



Then click on each instructor one at a time







Indicate which instructor should be primary under Instr. Role. Only one should be primary, and the others should be non-primary. Then adjust the percentage under Instr. Percentage, ensuring that the total for all instructors add up to 100%. Save.



When you go back to the Instructors card, you should see each instructor's role and percentage.



## Instructors

	TBA STAFF (Primary - 51%) 		
	TYPE	CONFLICTS	PREFERENCE FIT
	<b>Not Set</b>	0	N/A
	Charles Alvis (Non-Primary - 49%) 		
	TYPE	CONFLICTS	PREFERENCE FIT
	<b>Professor</b>	0	100%

[+ INSTRUCTOR](#)

 [SET INSTRUCTOR ROLES & DETAILS \\*](#)

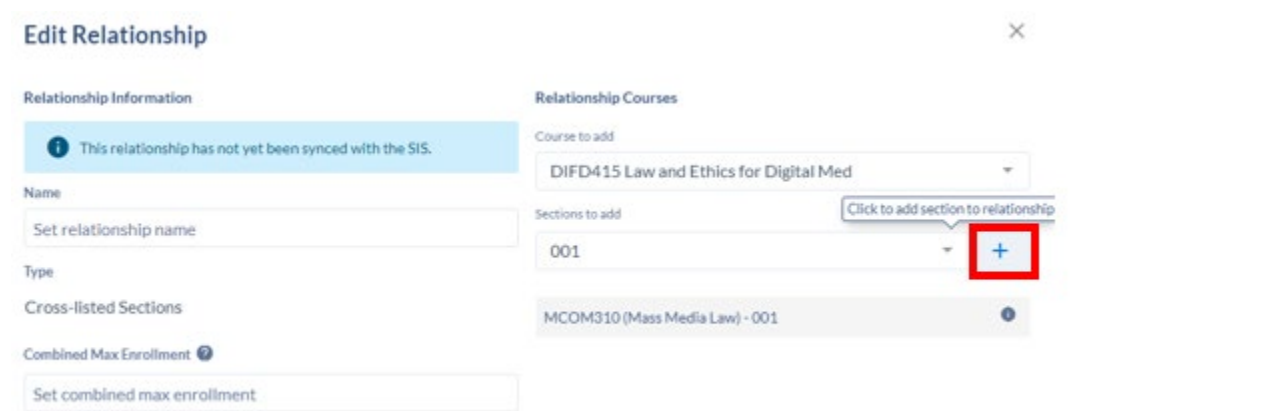
## Cross-listing sections

**NOTE: Departments are not currently able to add cross-lists. Email Records and Registration any cross-lists you need added, and we will take care of it for you.**

You will set up cross-lists on the Relationship card in the Section Editor. Click on the +Cross-listed Sections to edit the relationship.



First you add the cross-listed course in the “Courses to add” field. Then you have to select the section in the “Sections to add” field. **After you have selected the section (001 is selected below), you need to click on the plus (+) next to Sections to add.**



Once you click on the plus, it will add it to the area with the red box around it below. Once both courses are there, the cross-list has been created. You also want to make sure you that under Relationship, you select “Same Time Same Day Same Room” to resolve instructor and room conflicts.

Relationship Information

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

Name

Set relationship name

Type

Cross-listed Sections

Combined Max Enrollment **?**

Set combined max enrollment

Relationship **?**

Same Time Same Day Same Room

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

Relationship Courses

Course to add


Type to search for courses

- DIFD415 (Law and Ethics for Digital Med) - 001
- MCOM310 (Mass Media Law) - 001



## Entering Footnotes/Course Notes

Footnotes/Course notes should be entered on the Notes card in the Section Editor, under Section Notes.

 **Notes**

Syllabus Notes

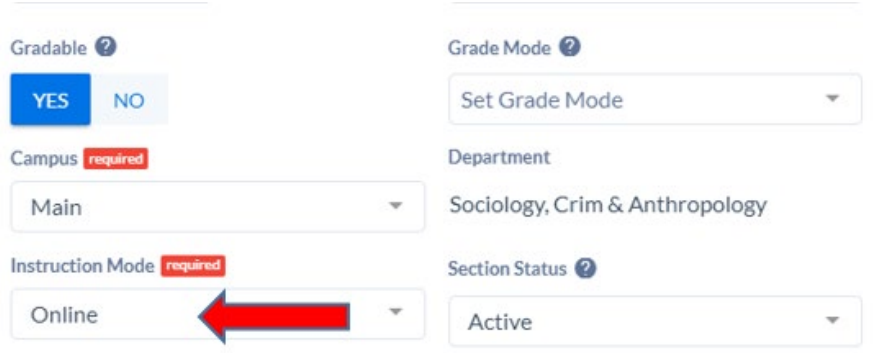
Introduction to African American Studies (3).

Section Notes

Enter Notes

## Changing a Section's Instruction Mode (Classroom, Online, Hybrid)

You can change between Classroom, Online, and Hybrid sections in Coursedog under Instruction Mode.



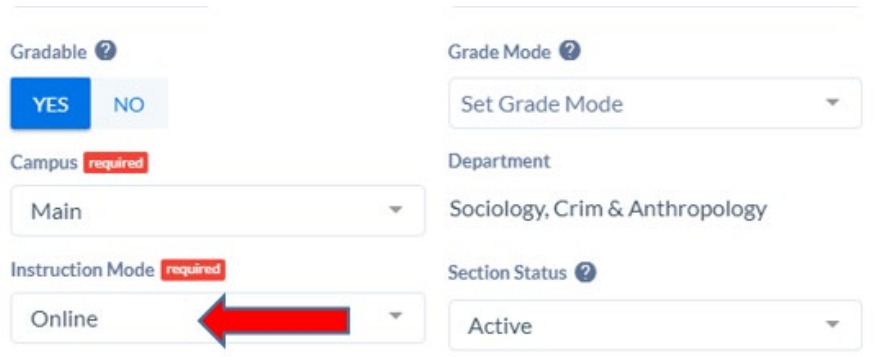
The screenshot shows a form with several fields. On the left, there is a 'Gradable' toggle with 'YES' selected, a 'Campus' dropdown menu set to 'Main', and an 'Instruction Mode' dropdown menu set to 'Online'. A red arrow points to the 'Instruction Mode' dropdown. On the right, there is a 'Grade Mode' dropdown menu set to 'Set Grade Mode', a 'Department' field with the text 'Sociology, Crim & Anthropology', and a 'Section Status' dropdown menu set to 'Active'.

**NOTE:** If there are any students enrolled in the class, you cannot change the Instruction Mode. If registration has started, check Wingspan to see if anyone has registered (enrollment information in Coursedog is not real time). The process for changing Instruction Mode with enrollment should be: 1) change the Enrollment Capacity to zero in Coursedog so no new students register while the change is being made, 2) email the students enrolled to notify them of the change, and 3) email Academic Scheduling to change the Instruction Mode. Once the Instruction Mode is updated, Academic Scheduling will change the Enrollment Capacity back to the appropriate number.

When you make changes to the Instruction Mode, please be sure to change the Meeting Pattern to match. This next page shows how to set an asynchronous online meeting pattern. Once you change the Meeting Pattern, you may get an error that you need to set the instructor roles and details (see page 6 of this document).

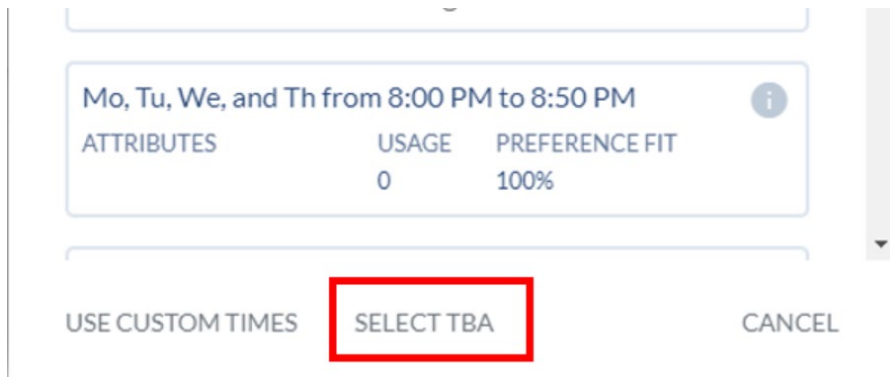
## Setting an Asynchronous Online Meeting Pattern

First of all, in the Section Template, make sure the Instruction Mode is set to Online.



The screenshot shows a form with several fields. The 'Instruction Mode' field is highlighted with a red arrow pointing to the 'Online' option. Other fields include 'Gradable' (YES/NO), 'Grade Mode' (Set Grade Mode), 'Campus' (Main), 'Department' (Sociology, Crim & Anthropology), and 'Section Status' (Active).

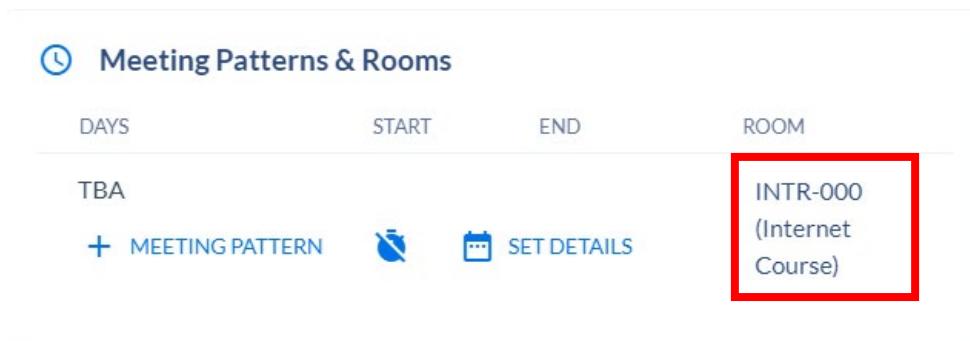
If the course is asynchronous, under Meeting Patterns and Rooms, click on the meeting pattern. At the bottom of the pop-up box that opens, click “Select TBA.”



The screenshot shows a pop-up box with a meeting pattern: 'Mo, Tu, We, and Th from 8:00 PM to 8:50 PM'. Below this is a table with columns 'ATTRIBUTES', 'USAGE', and 'PREFERENCE FIT'. The 'USAGE' value is 0 and the 'PREFERENCE FIT' value is 100%. At the bottom of the box, the 'SELECT TBA' button is highlighted with a red box.

ATTRIBUTES	USAGE	PREFERENCE FIT
	0	100%

Then for online classes, the room should be set to INTR-000.




The screenshot shows a table titled 'Meeting Patterns & Rooms'. The table has columns for 'DAYS', 'START', 'END', and 'ROOM'. The 'ROOM' column is highlighted with a red box, showing 'INTR-000 (Internet Course)'. There are also buttons for '+ MEETING PATTERN', a calendar icon, and 'SET DETAILS'.


DAYS	START	END	ROOM
TBA			INTR-000 (Internet Course)

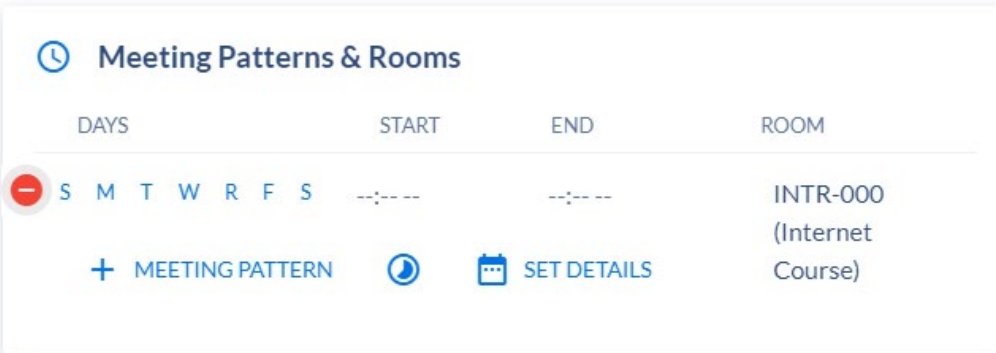
## Changing Part of Term


**NOTE:** If there are any students enrolled in the class, you cannot change the Part of Term. If registration has started, check Wingspan to see if anyone has registered (enrollment information in Coursedog is not real time). The process for changing Part of Term with enrollment should be: 1) change the Enrollment Capacity to zero in Coursedog so no new students register while the change is being made, 2) email the students enrolled to notify them of the change, and 3) email Academic Scheduling to change the Part of Term. Once the Part of Term is updated, Academic Scheduling will change the Enrollment Capacity back to the appropriate number.


When changing the Part of Term, you may get an error that the Part of Term field cannot be modified when meeting times exist, like this:

 This section's Part Of Term field cannot be modified when enrollments or meeting times exist, or when section is Open Learning.

Before you can change a part of term, you will need to delete the meeting pattern and the instructor. For the example below, even though there is no meeting time, there is still a meeting pattern. Hover over the area next to the S (for Sunday) until the  comes up, then click it to delete the meeting pattern. Once you delete the meeting pattern and instructor, you will need to save the section.



DAYS	START	END	ROOM
 S M T W R F S	---	---	INTR-000 (Internet Course)

[+ MEETING PATTERN](#)  [SET DETAILS](#)

After you have deleted the meeting pattern and saved, you should change the part of term to the appropriate value. Then you should save. After you have done that, you can then go back and add the instructor and meeting pattern back to the class.

## Variable-Credit Courses and Sections

Winthrop has a limited number of variable-credit courses, and how the section should be set up in Courshedog depends on whether or not the section will be variable-credit. This is controlled by the Credits card in the Section Editor.

- 1) **If the course is a fixed-credit course (always has the same number of credit hours), you should not make any changes to this card.** You can just ignore it and scroll past.
- 2) If the course is a variable-credit course (the course from the screenshot below can be 1 to 3 credits) and the section should stay variable-credit (students in the class have a varying number of credits), then the boxes in the far right column of the Credits card should stay blank. You do not need to set any credit hours. Please note that students in a variable-credit section cannot register themselves in Wingspan. The appropriate person should email Records and Registrations the names and CWIDs for the students who need to be registered for the class.
- 3) If the course is variable-credit but the section should be fixed credit (every student in the class has the same number of credits), then you should set the appropriate number of credits in the boxes in right-hand column. The numbers you enter should be in the range allowed for the course or you will get an error. **The billing hours field should always match the credit hours field.** The sum of the lecture, lab, and other hours should be equal to the contact hours for the section. All credits should be in the approved range for the course. For example, the course below has 0 lecture hours, so you cannot add lecture hours to a section of that course.

### Credits

Credit Hours (fixed, or minimum)	Credit Hours Operator	Credit Hours (maximum)	Credit Hours ?
1	TO	3	<input type="text" value="(only use to set)"/>
Lecture Hours (fixed, or minimum)	Lecture Hours Operator	Lecture Hours (maximum)	Lecture Hours
0	—	—	<input type="text" value="Set Lecture Ho"/>
Lab Hours (fixed, or minimum)	Lab Hours Operator	Lab Hours (maximum)	Lab Hours
0	—	—	<input type="text" value="Set Lab Hours"/>
Billing Hours (fixed, or minimum)	Billing Hours Operator	Billing Hours (maximum)	Billing Hours ?
1	TO	3	<input type="text"/>
Other Hours (fixed, or minimum)	Other Hours Operator	Other Hours (maximum)	Other Hours
1	TO	3	<input type="text" value="Set Other Hou"/>
Contact Hours (fixed, or minimum)	Contact Hours Operator	Contact Hours (maximum)	Contact Hours ?
1	TO	3	<input type="text"/>



## Adding Instructor/Departmental Approval

To add instructor or department approval, scroll to the very bottom and in the Additional Information and Guidance card, under Special Approval, select “Instructor Approval” or “Department Approval.”

**Additional Information and Guidance**

Special Approval

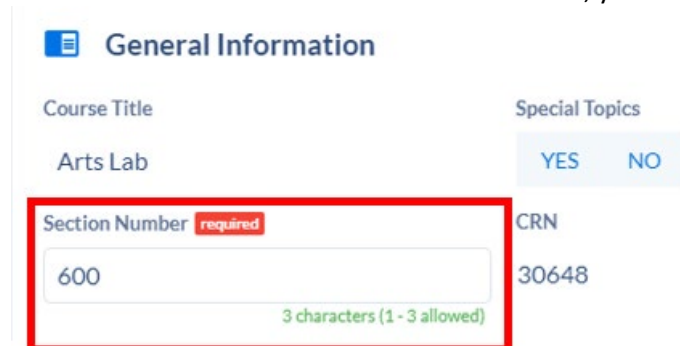
Set Consent

Section Requirements/Restrictions are viewable in Banner SCAURES (Catalog Level) or SFAURES (Section Level)

## Setting up Special Courses

Special Courses are classes that are offered at an off-campus site, have a special tuition rate, are grant funded, or include travel where the fees for travel are collected through student accounts. These classes must have an approved Special Course Registration form before students can register for them. When you set up a Special Course in Coursedog there are a couple things to keep in mind.

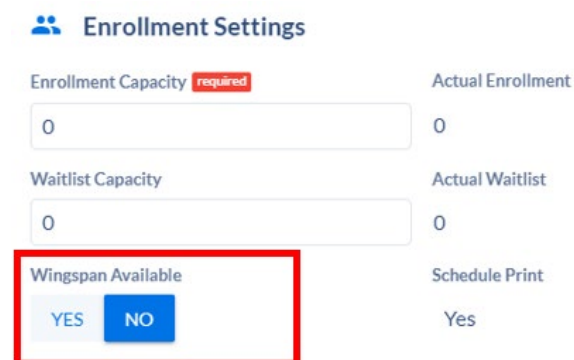
First, special courses should have a section number that starts with 600. If you have several “special course” sections of a class in the same semester, you will start with 600, then use 601, 602, and so on.



**General Information**

Course Title	Special Topics
Arts Lab	YES NO
<b>Section Number</b> <small>required</small>	CRN
600	30648
<small>3 characters (1 - 3 allowed)</small>	

Since students should not register until the Special Course completes the approval process, the Enrollment Capacity should be set to zero and the class should be hidden in Wingspan until the Special Course Registration Form is fully approved. To hide the class in Wingspan, on the Enrollment Settings card, select NO under Wingspan Available.



**Enrollment Settings**

<b>Enrollment Capacity</b> <small>required</small>	Actual Enrollment
0	0
<b>Waitlist Capacity</b>	Actual Waitlist
0	0
<b>Wingspan Available</b>	Schedule Print
YES NO	Yes

Once the section has been created in Coursedog, it will push to Banner and then the [Special Course Registration Form](#) system. It can take up to a day for it to show up in the SCRF. Once the form is submitted and the approval process is complete the Associate Registrar for Registration and Scheduling will change the capacity and make the class available in Wingspan, if appropriate.

More information about Special Courses can be found on the [Special Course Information Page](#).

## Adding a New Instructor to Your Department

The first step to adding a new instructor to your department is to email Academic Scheduling the name, CWID, and category (options below) of the instructor.

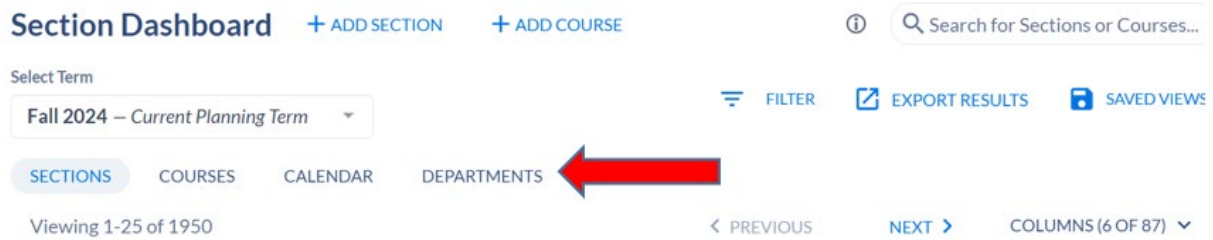
<b>ADJ</b>	<b>Adjunct Faculty</b>
<b>ASSOC</b>	<b>Associate Professor</b>
<b>ASST</b>	<b>Assistant Professor</b>
<b>GA</b>	<b>Graduate Assistant</b>
<b>INST</b>	<b>Instructor</b>
<b>LECT</b>	<b>Lecturer</b>
<b>OTH</b>	<b>Other</b>
<b>PROF</b>	<b>Professor</b>
<b>TA</b>	<b>Teaching Assistant</b>

Academic Scheduling will then set up the instructor in Banner and after the next merge (usually overnight), the instructor should be available to schedule in Coursedog.

## Submitting Schedule for Validation

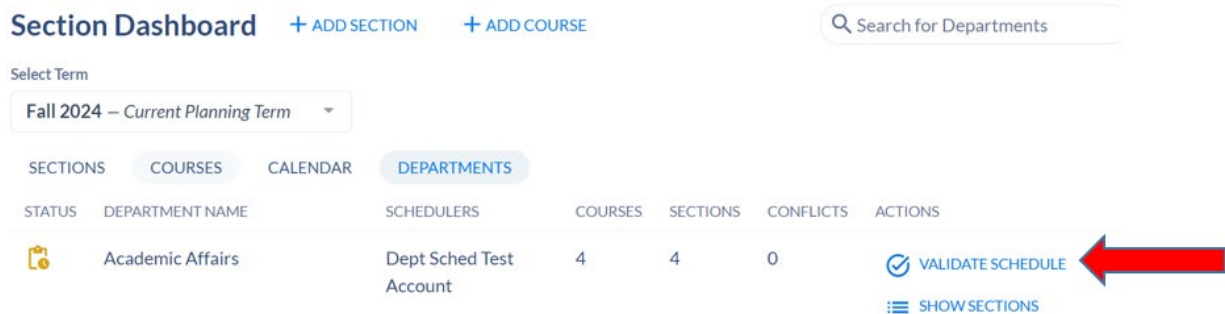
At the end of the scheduling period for each semester, department chairs are asked to submit their schedule for validation in Coursedog. This signals to your college and Records and Registration that your initial scheduling process is complete.

To submit your schedule for validation, you should go into the **Section Dashboard** and select **DEPARTMENTS** in the upper right-hand corner.



The screenshot shows the 'Section Dashboard' interface. At the top, there are buttons for '+ ADD SECTION' and '+ ADD COURSE'. Below that is a search bar labeled 'Search for Sections or Courses...'. A 'Select Term' dropdown is set to 'Fall 2024 - Current Planning Term'. There are buttons for 'FILTER', 'EXPORT RESULTS', and 'SAVED VIEWS'. A navigation bar contains tabs for 'SECTIONS', 'COURSES', 'CALENDAR', and 'DEPARTMENTS'. The 'DEPARTMENTS' tab is highlighted with a red arrow. Below the tabs, it says 'Viewing 1-25 of 1950' and navigation arrows for 'PREVIOUS' and 'NEXT', along with a 'COLUMNS (6 OF 87)' dropdown.

Select **VALIDATE SCHEDULE** next to your department.



The screenshot shows the 'Section Dashboard' interface with the 'DEPARTMENTS' tab selected. A search bar labeled 'Search for Departments' is at the top right. Below the search bar are buttons for '+ ADD SECTION' and '+ ADD COURSE'. A 'Select Term' dropdown is set to 'Fall 2024 - Current Planning Term'. There are tabs for 'SECTIONS', 'COURSES', 'CALENDAR', and 'DEPARTMENTS'. The 'DEPARTMENTS' tab is highlighted. Below the tabs is a table with columns: STATUS, DEPARTMENT NAME, SCHEDULERS, COURSES, SECTIONS, CONFLICTS, and ACTIONS. The table has one row for 'Academic Affairs' with a status icon, 'Dept Sched Test Account' as the scheduler, 4 courses, 4 sections, and 0 conflicts. In the ACTIONS column, there are two buttons: 'VALIDATE SCHEDULE' (with a checkmark icon) and 'SHOW SECTIONS' (with a list icon). A red arrow points to the 'VALIDATE SCHEDULE' button.

STATUS	DEPARTMENT NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	ACTIONS
	Academic Affairs	Dept Sched Test Account	4	4	0	<a href="#">VALIDATE SCHEDULE</a> <a href="#">SHOW SECTIONS</a>

Once the schedule is submitted for validation, the Department Chair should select **Requests** from Scheduling Management menu on the left-hand side of the screen. They should then open their request and approve it to send it to their College and Records and Registration.

After the schedule is submitted for validation, it will be locked for changes until Records and Registration approves it.

Once Records and Registration finishes reviewing the schedule, they will approve it, completing the workflow.

## Looking Up Class Rosters in Wingspan


You can view class rosters with email by clicking on the **Faculty Services** tab in Wingspan, then select **Summary Class List**. Then you'll select the term. The drop down will show classes you are teaching. To access classes you are *not* teaching, click on **Enter CRN Directly**.

Home Personal Information Student **Faculty Services** Finance Administrative Tasks

Select a CRN RETURN TO MENU

CRN:

---

[ Enter CRN Directly ] 

RELEASE: 8.7.1  
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You enter the CRN and click **Submit**. Then it will show the roster for that class along with email addresses. You can also email the entire class from this page. If you don't have access to this, please contact the Registrar to request access.