Overview

This document describes the tables which will need to be set up by institution in order to utilize the new Distributed Schedule of Classes. It should also be noted that the SR Scheduler 1 Role is required to view and update these tables.

Steps

Table Setup

1. SOC Distributed Dates – IU Panels > SOC Distributed dates - This table is set up by Academic Institution, Academic Career, and Term. Enter the following:
   a. Build Begin Date – This is the date that you want to begin allowing departments to use the application to begin building their classes for the term
   b. Adds Only Begin Date – This is the date that you want the application to begin accepting adds only, no updates to existing classes will be allowed on or after this date
      i. You can create separate Adds Only Begin Dates based on sessions within the term utilizing the Session Date Overrides – No override date and the application uses the main Adds Only Begin Date
   c. Read Only Begin Date – This is the date that the application become read only – no adds or updates are permitted on or after this date
   d. You can create separate Read Only Begin Dates based on sessions within the term utilizing the Session Date Overrides – No override date and the application uses the main Read Only Begin Date
   e. See #6 below for table setup of Post Build updates.

2. SOC Distributed Attributes – IU Panels > SOC Distributed Attributes - This table is by institution and defines the attributes that you will permit departments to add to classes. Only the attributes that you set in this table will be displayed in the search when adding an attribute to a class.
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a. Currently, there is only a search on Course Attribute Description; we are in the process of modifying the application to allow for a search on Course Attribute Value.

3. Map Org to Facility – IU Panels > Map Org to Facility - This table is by institution and academic organization and maps the academic org of the class to the facility ID owner – if the academic org of a class is not mapped, no facility ID’s will be shown in the Facility ID Search or will be able to be entered directly into the field on the Meetings and Enrl Cntrl page of the Maintain SOC (Distributed) pages.

- The Facilities Department may be found on the facilities table from the IUIE report IE_SISADM_PS_FACILITY_TBL (dated on or after Jan. 27, 2015).
- You will need to review all facility ID’s for room types AUD, CONF, CLAS, LAB, RLAB, LCTR, and SMNR to make sure that the facility department owner listed on the facility table is correct. If not correct, you will have to work with Julie Stines to correct the information through the CAFM feed to SIS.
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- Remember that if you do not set up this table for an Academic Org, they will be unable to see any rooms that they may control, but they will be able to request any facility ID and it will be up to the registrars to determine if the request is granted.

4. SOC Distributed Auto Notes – IU Panels > SOC Distributed Auto Notes – This table is used to control the addition of pre-defined notes, by institution, based on any of the following: Class Attributes, Class Association Requirement Designation, Class Association, Requirement Group, Add Consent, Drop Consent, Instruction Mode, or Session Code.

5. Distributed Begin/End Override – This is a new field that is on the Session Table and is used to control users’ ability to change the Start/End Date of a class on the Basic Data tab of the Maintain SOC (Distributed) page. This will need to be checked for Sessions NON, NS1, and NS2 in order for departmental users to edit the Start/End Date for non-standard session classes.
6. IU SOC Field Override – IU Panels > SOC Dist Override Addonly Dt – This table is set up by institution and career. Set up the record field(s) to allow Post Build Updates.

The following fields may be selected for updates from the term/session add-only period using IU Panels>SOC Dist Override Addonly Dt and requires the SR Scheduler 1 role in PeopleSoft.

When setting up this control table, you will set it up by institution and career and enter an email address that you want used for notification of changes, if the Send email box is checked.

**Record Field** – This is the field on the Maintain SOC (Distributed) pages that you want to allow departments to update from the term/session add-only date.

**Session** – Choose a session if you want to limit which sessions a record field is updatable, or leave blank for all sessions.

**Days from add only date** – This is the number of days that you want a record field to be updatable by a department from the term/session add-only date.

**NOTE:** The add-only date is day 0, so if you set “Days from add only date” to 5, a department will be able to update that field on day 0 (add-only date) and days 1, 2, 3, and 4.
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Send email – Check this box if you want to receive an email at the email address established on the control table when a department makes a change to the Record field selected.

**Term Type** – You may choose any combination of Fall, Spring, Summer, and Winter for each row, or you can add a row for each term type with varying criteria for each row. It is also allowed to have a row set up for a Record field that does not have any term type selection; however, a row of this type does not allow for any updates, it is as if the row does not exist on the table. This was intentional so that an institution can have one row set up and toggle term type on and off as necessary to fit their needs.

**Record Fields**

**Attributes** – This Record field controls whether the class attributes are updatable from the term/session add-only date. Attributes that come from the course catalog will still not be updatable, however, attributes at the class level, that your institution has set up on the SOC Distributed Attributes Control Table (IU Panels>SOC Distributed Attributes), may be updated. Adding or changing an attribute value will trigger an auto note if it is set to a value that you have set up on the SOC Distributed Auto Notes Control Table (IU Panels>SOC Distributed Auto Notes). Also, keep in mind that the Notes are not automatically removed when attribute values change.

**Class Section** – This Record field controls whether the class section is updatable from the term/session add-only date. Things to keep in mind when allowing section changes:

1. If the **Override Associated Class** field is not checked for a class, a section change will create a new associated class because of the logic that forces a standard associated class number.

2. If a new associated class is created because of #1 above, all of the associated class values will reset to the course catalog – this includes credit hours, grading basis, component, requirement groups, and prerequisites. (This is current delivered functionality.)

**Class Status** – This Record field controls whether the **Class Status** field is updatable from the term/session add-only date. The departmental user only has the option of ‘stop further enrollment.’

**Class Type** – This Record field controls whether the **Class Type** is updatable from the term/session add-only date. Changing this record field will also change the class status to ‘tentative’ so that the registrar can review and approve the change. **Note:** This field will be read-only once there is enrollment in the class.

**Combined Sections** – This Record field will control whether the enrollment cap of a combined section (separate or combined) is updatable from the term/session add-only date and works independently of the **Enrollment Capacity** Record field. The Enrollment Capacity of classes that are members of a combined section will be greyed out on the individual classes because updates to the combined section enrollment capacity is managed through the combined sections link on the Meeting and Enrollment Control page. We do look for distributed combined section security as well as the combined section sponsor field for additional control between a read only or updatable view. Changes to the Enrollment Capacity of combined sections will trigger the Ad Astra RTI and be imported into Ad Astra real time.

**Component** – This Record field controls whether the **Component** is updatable from the term/session add-only date. Component includes the component on the **Basic Data** page and the graded component on the **IU Class Assoc** page. When the component is changed, the **Enrollment Capacity** resets to 1. Changing the component will move the class status from ‘Active’ to ‘Tentative’ so that it can be approved by the registrar. The component changes are limited to already scheduled components. If a component needs to be added that is not already scheduled, a new class must be added so that the needed component can be added from the course catalog. **Note:** This field will be read-only once there is enrollment in the class.
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Consent - This record field controls whether or not Add Consent and Drop Consent are updatable from the term/session add-only date. **Note:** Changing this field will trigger an auto note if it is set to a value that you have set up on the SOC Distributed Auto Notes table.

Enrollment Capacity – This Record field controls whether a class’s Enrollment Capacity is updatable from the term/session add-only date. As noted above in Combined Sections, this record field works independently of Combined Sections and only applies to non-combined sections. A change to the enrollment capacity of a class will trigger the Ad Astra RTI and be imported to Ad Astra real time.

Grading Basis – This Record field controls whether a class’s Grading Basis is updatable from the term/session add-only date. The same restrictions apply in the post build timeframe as in the build timeframe, GR1 and GR2, and, if approved, SF and SF2 will be the options available for Grading Basis. A change to this field will require a class roll, and the email will remind the recipient that a class roll is required.

Instructor – This Record field controls whether Instructor is updatable from the term/session add-only date. If this field is updated, it will trigger the Ad Astra RTI and import the changes to Ad Astra.

Meeting Pattern – This Record field controls whether the Meeting Pattern and Facility ID is updatable from the term/session add-only date. **Facility ID** will only be updatable if you have the Acad Org set up in the Map Org to Facility Table. **Meeting Pattern** changes for combined sections is also controlled by this record field from the Update Meeting Pattern link on the Meeting and Enrollment Control page. For combined sections, we also look at the sponsor flag of the combined sections, if one exists, and limit updates to the sponsoring Acad Org. **Caution should be used when allowing changes to the meeting pattern and facility ID, particularly if your institution has already assigned classrooms for the term, as these changes will trigger the Ad Astra RTI and import these changes into Ad Astra real time. If there is a facility ID that is assigned, added, or changed, that room may not be available at that time. Also, if a Facility ID exists and the meeting time or days are changed, the room may not be available. Just remember what is changed here is reflected in Ad Astra, so proceed cautiously.**

Notes – This Record field controls whether Notes are updatable from the term/session add-only date. Auto notes will still be added as set up by your institution in the SOC Distributed Auto Notes Table, even if you do not allow notes to be updated from the term/session add-only date. Notes also include the Notes to Registrar field, so if you did not want to allow meeting pattern changes due to the Ad Astra RTI, but you wanted departments to be able to request a facility or meeting time change, the department could place the request in the Notes to Registrar field and if you determine that the space and time are available, the change could be made in the Registrar’s office.

Reserve Capacity – This Record field controls whether Reserve Capacity is updatable from the term/session add-only date.

Session – This Record field controls whether Session is updatable from the term/session add-only date. If your institution has Session configured in the SOC Distributed Auto Notes, an auto note is added depending on the values configured. Changing the session will also change the status of the class from ‘Active’ to ‘Tentative’ pending Registrar approval and verification that no conflicts exist in the new session. **Note:** Session is not permitted to be changed once there is enrollment in the class. If a department is permitted to make a session change to a class, consideration needs to be given to the following:

1. A session change will create a new associated class and there is no logic that checks for an identical existing associated class in the new session. Therefore, it is possible that a class’ session can be changed to a session that already has the same associated class number resulting in an associated class consisting of classes that are not intended to be part of an association.
2. Since a new associated class is created, all of the associated class values will reset to the course catalog – this includes credit hours, grading basis, component, requirement groups, and prerequisites. (This is current delivered functionality.)

3. Session changes also trigger the Ad Astra RTI and will cause a duplicate class situation in Ad Astra that is resolved with a full import of the term into Ad Astra which occurs weekly or on demand, as needed. This happens now when a class’ session is changed, so this is not new behavior.

Units – This Record field will control whether Units are updatable from the term/session add-only date. Units are restricted to the values approved in the course catalog. Changes to units require a class roll, and the email notification that is received will remind the recipient that a class roll is required due to a units change.

Email Notifications

1. Email notifications will be delivered to the email address on the SOC Dist Override Addonly Dt Control Table.
2. Class details will be in the subject line with the change details in the body of the email.

3. If there are changes to multiple fields at the same time and the send email flag is checked for one field, but not the other, the email notification for the one with the email flag checked will pick up the other changes as well.

Prior Term Copy (PTC) Steps

1. USSS runs PTC.
2. After PTC and before distributing the Distributed SOC to department, run the following IU Update Query from IU Panels > IU Process > IU SR Update Query. (This will need to be added to your IU Query Security with read/write access and update processing mode.)
   a. IU_SR_OVRD_ASSOC_CLS_UPDT
   b. View report by navigating to Process Monitor > Details > View Log/Trace and opening the .csv file
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This script will do the following:

1. Update the IU_MULTI_CMPNT (Multi Component Course) flag for classes that are in an association with more than one other class.

2. Then the script updates the IU_OVER_CLAS_ASSC (Override Associated Class) Flag making sure it is Y for all non-standard associated class numbers (Standard associated class is defined as the first two digits of the class section number for multi-component classes, or equal to the class section number for single component classes – anything else is considered non-standard).

3. Generate a report to show all classes where the Associated Class is not standard. It is possible for a class to have the multi component flag set to Y, but the Associated Class is in standard form as described in #2 above, so the Override Associated Class is N, and in this case would not appear on the report.

   a. The scenarios are as follows:

      i. Multi Component Flag = Y, Override Associated Class = N – Standard form, will not appear on report

      ii. Multi Component Flag = Y, Override Associated Class = Y, Non-standard form, will appear on report

      iii. Multi Component Flag = N, Override Associated Class = Y, Non-standard form, will appear on report

      iv. Multi Component Flag = N, Override Associated Class = N, Standard form, will not appear on report

Other SR IU Update Queries – Requested from module security coordinator, Lesley Grider.

- **IU_SR_SOC_DROP_CONSENT** – Update drop consent to no consent. Parms: Term, Institution, Career, Subject.

- **IU_SR_SOC_RMV_UNSCHED_COMP** – After the schedule build period, this script will be run by the Registrars to remove unscheduled components of courses. Parms: Term, Institution, Career.

- **IU_SR_SOC_ROLLED_ACT_STAT** – Update class status to active. Parms: Term, Institution, Career, Subject.