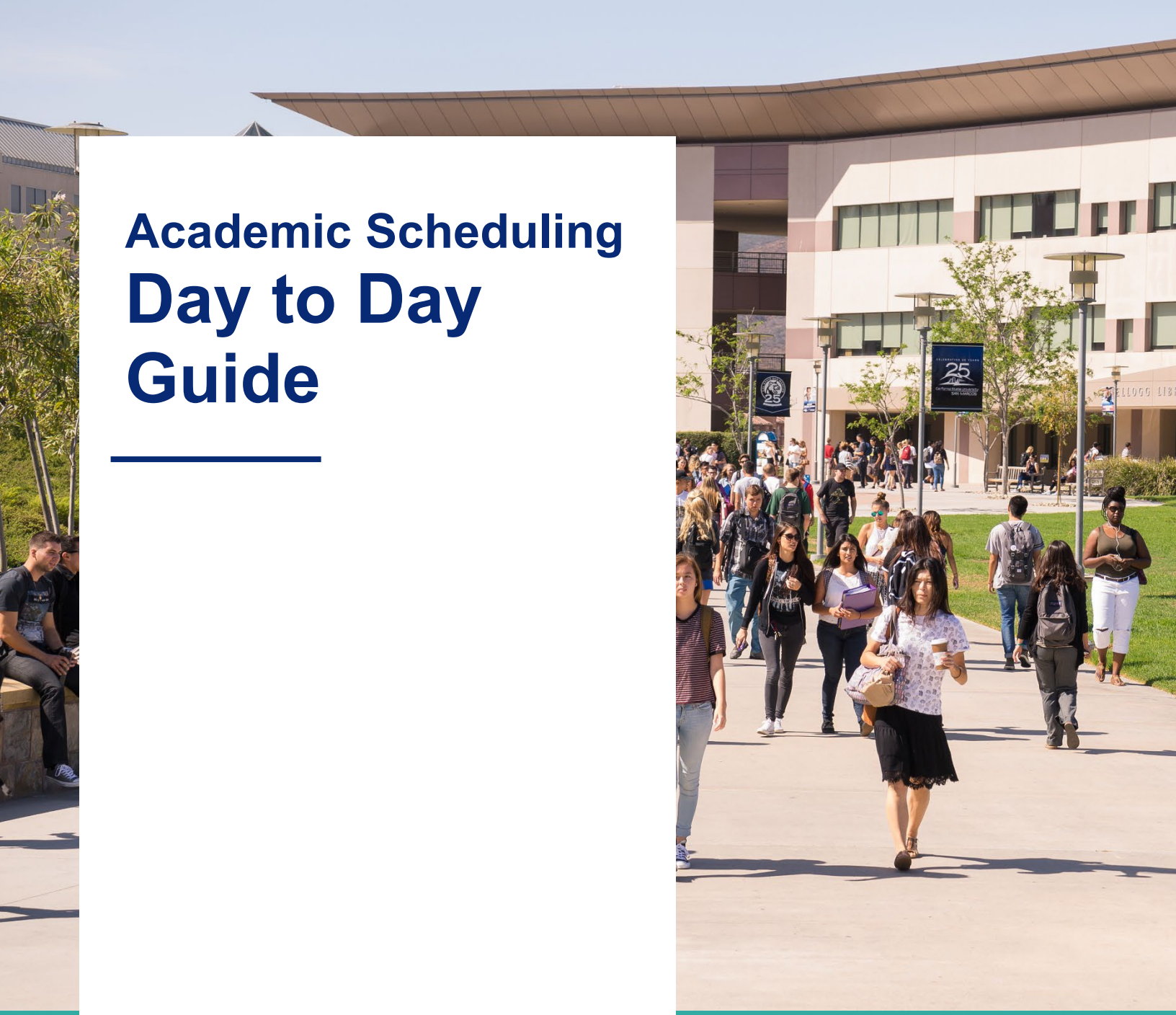


Academic Scheduling

Day to Day Guide

JULY 2, **2025**

Introduction and Important Information

Welcome! Schedule build is over or not yet begun, but there are still some changes that need to be made to the schedule. Not sure how to go about these changes? Read this guide! We list how to handle day to day scheduling changes as requested by department(s), program(s), and college managers.

Academic Scheduling is under the Planning and Academic Resources (PAR) office and is made up of Sally Serrin Melena, Kayla Hardin, and Melanie Vinazza.

First things first: Who should I email?

Always use the **Academic Scheduling Resource Mailbox** acdsched@csusm.edu for emails that have to do with academic scheduling – seriously, all of them, every request, question, comment, concern, issue, predicament, and more. All of the Academic Scheduling forms are directed to this email address and Sally, Kayla, and Melanie have access to it.

Please. Send. Emails. To acdsched@csusm.edu.

If you have a question for something outside of Academic Scheduling or that you **know** only one of the Academic Schedulers is working on, using their specific email is okay.

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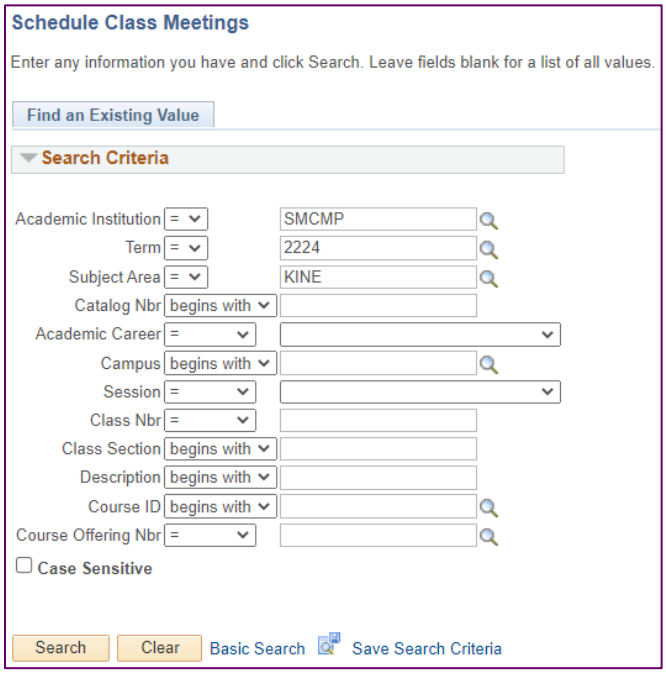
If something is not included in this guide and you think it should be, let us know!
Email Academic Scheduling at acdsched@csusm.edu

Running a Search

In PeopleSoft, go to: Main Menu -> Curriculum Management -> Schedule of Classes -> Schedule Class Meetings**.** Department staff should have access to do this year-round.

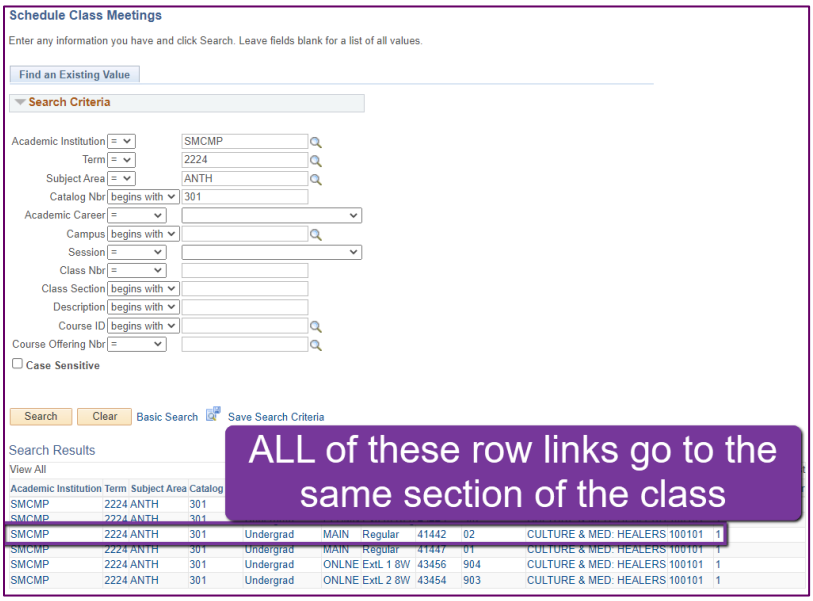
In the search, use (at least) the "Term" field to **run a search.**

- You can also fill in the "Subject Area" and "Catalog Nbr" fields.
- We recommend you do not fill in any other fields.



In the Search Results:

- All of the links in the same row will go to the SAME section of the class.
- **NOTE**: Once you are in the class, **PLEASE IGNORE and DO NOT TOUCH any EL sections** (they will always be section numbers 900 or higher and the Academic Org will show as "84 – ES")



Assigning Faculty to a Class

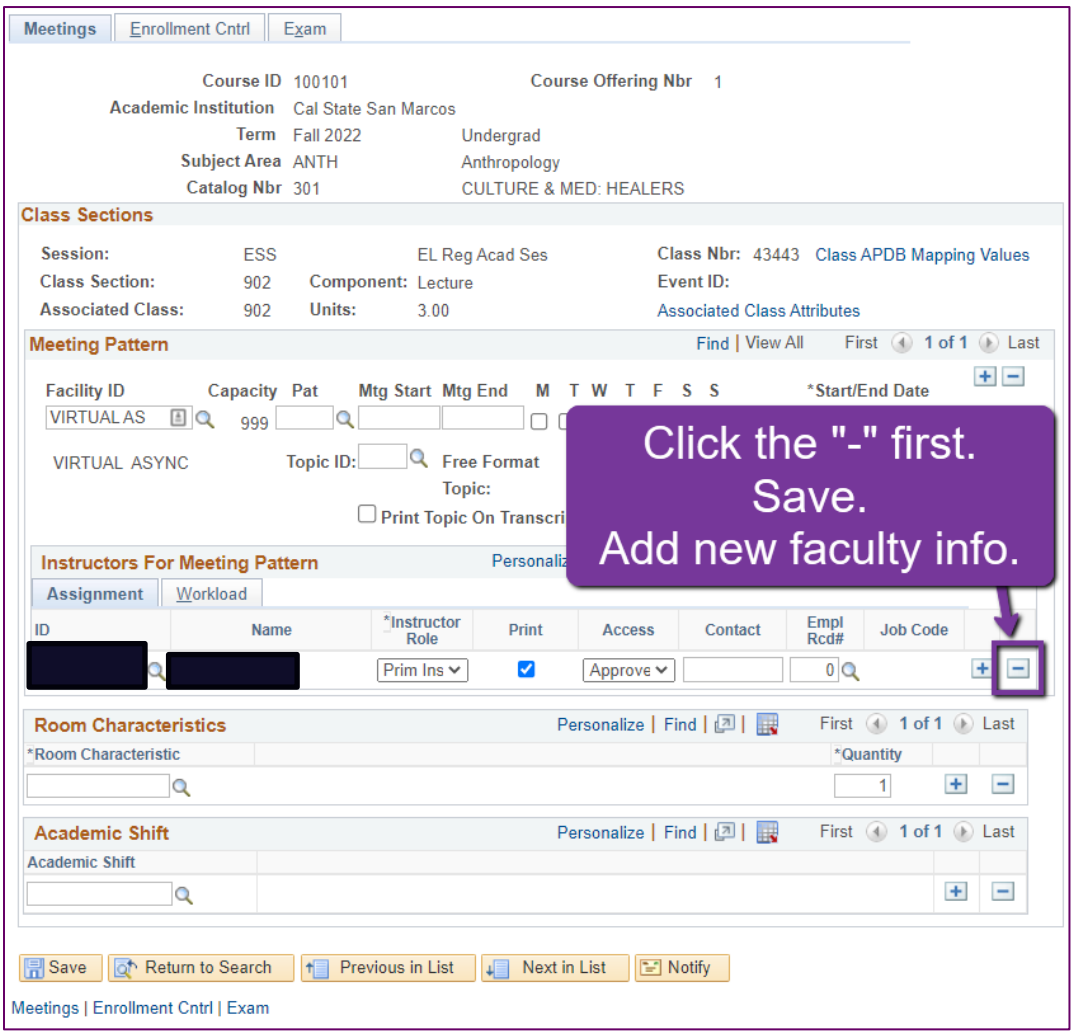
In PeopleSoft, go to: Main Menu -> Curriculum Management -> Schedule of Classes -> Schedule Class Meetings**.** Department staff should have access to do this year-round.

If there is no faculty currently assigned:

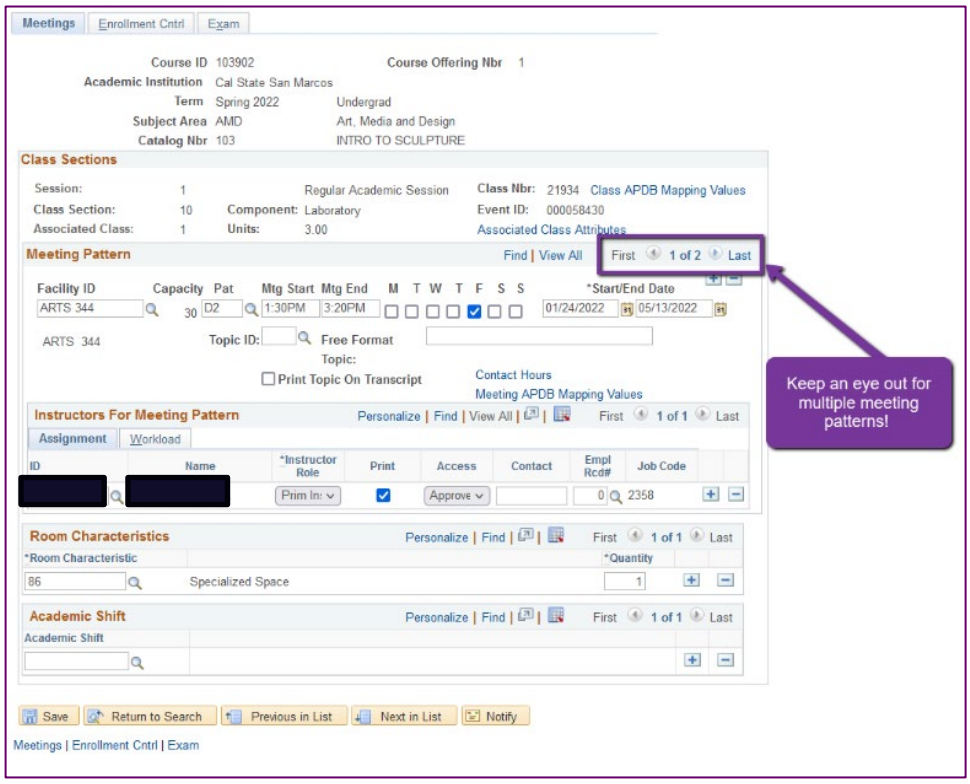
1. Enter in their ID (or search using the magnifying glass next to the ID field)
2. Change the access to “Approve”
3. Click Save. That’s it!

If you are changing faculty, first remove the current row, save, and then follow the steps 1-3 above. ➔

Enter ID directly or use magnifying glass to search.



Some things to keep in mind:



Multiple meeting patterns!

If a class has multiple meeting patterns, be sure to add the faculty to all of them. For everything past the first pattern, use "Not Includ" instead of "IFF" under the Workload tab.

Error when trying to assign: If your faculty member is unable to be assigned or you get an error when you enter in their ID, submit the "New Faculty (Instructor/Advisor Table) Form" that can be found under Academic Scheduling forms on the Academic Scheduling website.

New Faculty: When faculty are new to campus, they cannot immediately be assigned to classes. Wait until you have their Employee ID number (a.k.a. EmplID), which is often provided by the College Budget Analyst. Once you have it, see if their EmplID number can be entered in the "Instructors For Meeting Pattern" ID field in Schedule Class Meetings (it is often surprising which faculty can be assigned, even when no one remembers them teaching in your department before!). If you get an error that says the faculty cannot be assigned, please submit the "New Faculty (Instructor/Advisor Table) Form" that can be found on Academic Scheduling Forms webpage. Check the

Adding a new course

If your department chair requests to have a new course added to the schedule, Academic Scheduling will need to create the class for the department. It is very important to note that department staff only have access to create classes during schedule build. Outside of that time, all scheduling changes (with the exception of adding/removing/changing faculty) need to come through the Academic Scheduling office. Visit the Academic Scheduling Forms Webpage.

BEFORE submitting the "Section Add Form"

- **Need clear direction from Associate Dean**: Be sure that there is a clear email thread where the college, usually the Associate Dean, has approved the cancellation of the section (an email from the Chair is not enough). This email thread should include the class information (e.g., subject, catalog, and section(s) to be cancelled). This confirmation will need to be copied & pasted into the form. If you have not yet received approval from the college, please do not submit the form.
- **Check if room available**: If this section is to be in person, please check to see if there is a classroom available during the day/time that this class is to take place. Refer to the appendix for how to search for an available classroom using 25Live.

Once your form has been submitted, Academic Scheduling will process it in the order it was received. If there is additional information that is needed, or information that is missing, Academic Scheduling will reach out for clarification.

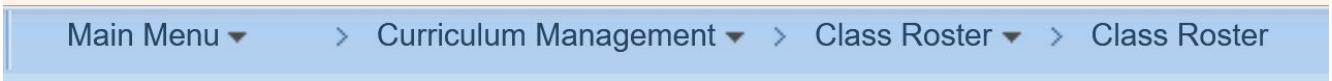
Please keep in mind that while *your* department in fact is our favorite, we do have to assist all other departments on campus as well. Sometimes this does result in some backlog, but we do try our best to get through requests in a timely manner.

Cancelling a course

If a course needs to be cancelled, Academic Scheduling will need to cancel the class for the department. It is very important to note that department staff only have access to cancel classes during schedule build. Outside of that time, all scheduling changes (with the exception of adding/removing/changing faculty) need to come through the Academic Scheduling office.

BEFORE submitting the "Section Cancel Form"

- **Need clear direction from Associate Dean**: Be sure that there is a clear email thread where the college, usually the Associate Dean, has approved the cancellation of the section (an email from the Chair is not enough). This email thread should include the class information (e.g., subject, catalog, and section(s) to be cancelled). This confirmation will need to be copied & pasted into the form. If you have not yet received approval from the college, please do not submit the form.
- **Download the Roster**: Make sure to download the class roster, with email addresses, if students are enrolled. This can be done in PeopleSoft with the following file path:

  It is the department's responsibility to notify students that the class they are enrolled in is no longer going to be offered. Once a class is cancelled, the class roster is removed from the system and there is no way to know what students were affected by the cancellation.

Once your form has been submitted, Academic Scheduling will process it in the order it was received. If there is additional information that is needed, or information that is missing, Academic Scheduling will reach out for clarification.

Making changes to a course

Change requests may be submitted *after* Classroom Rush has been completed. Please refer to the current term's Schedule Build Timeline for the date that this occurs each semester.

All schedule change requests *must* go through Academic Scheduling. Departments may not make changes (except for adding/removing instructors) to the class schedule once Schedule Build is complete.

Forms available on the Academic Scheduling Forms webpage (https://www.csusm.edu/par/acdsched/schedulingforms.html).

Three or more changes? If you have more than 2 changes to be made, please send a table with the necessary information to Academic Scheduling (acdsched@csusm.edu).

- Please note, at minimum, we need the Subject, Catalog, Section, and CRN of a class in order to search for it in PeopleSoft.
- If information is missing, we will request clarification and that may result in a delay of processing your request.

Include a table. An example of a table requesting an enrollment cap increase may look as follows:

Subject	Catalog	Section	Class Nbr	Current Cap	Facil ID	RmSz	Start Date	End Date	Day(s)	Start	End	New Cap
MATH	160	10	40688	70	MARK 125	125	8/29/2022	12/10/2022	MWF	9:30 AM	10:20 AM	72
MATH	160	11A	40690	35	ACD 408	36	8/29/2022	12/10/2022	F	10:30 AM	12:20 PM	36
MATH	160	12A	40691	35	MARK 203	36	8/29/2022	12/10/2022	F	12:30 PM	2:20 PM	36

Notice how the cells that are related to the cap changes are highlighted – this helps bring that information to the attention of Academic Scheduling. Running a query is a great way to get all of this information at once!

Types of Changes

Enrollment Change – if you need to change an enrollment cap, please be sure the classroom where the class is being held can fit additional students (check in 25Live). If this is the case, you will need to fill out the "Change the Cap/Time/Day Request Form" on the Academic Scheduling Forms webpage.

Enrollment Control – this form is for the following changes:

- Make a class section active or tentative.
    - If a class was tentative and needs to change to active, your college may require that you get approval from the Associate Dean before submitting this form.
- Change the consent (permission number required) of a section
- Turn the Schedule Print and/or Waitlist On or Off
- Add a Reserve Cap

Permission numbers

- Check that permission numbers are not assigned to a section before requesting additional permission numbers.
- Permission numbers are generated in batches throughout the schedule build process. Please refer to the current semester timeline for information.
- Be sure that there is physical space to add more students to a class (this goes for all components of a class).
- NOTE: Permission numbers are ONLY assigned to the enrollment section of a course only. Students cannot use a permission number for a non-enrollment section.

Section Maintenance – this form is for multiple changes to a section, including:

- Change the time/day/cap for a section
- Make a section Active or Tentative
- Add/Remove a Note, Consent, Reserve Cap, and/or Schedule Print

Room Change – You may need to move a class from one room to another. If you are doing a swap, please indicate which class you are swapping with in the comments section of the form. Always check space availability in 25Live before submitting this form. Please see the appendix for how to check for space availability using 25Live before submitting your Room Change Request Form.

Moving a Class when there are NO Currently Available Classrooms

This is a long process. I suggest you show the faculty who is insisting the room be changed these directions. Let the faculty know there is not an easier way to do this because there are NO rooms currently available.

1. Check how many students are enrolled and what the room size is. Do not automatically trust that the class is in fact overenrolled. (In this case I will use FACULTY to indicate the person asking for the change)
2. Check 25Live with the Classroom Availability Report and see if there is a larger room available. See: Running the Space Availability by Meeting Pattern Report on the Schedule Build Process Guides page: https://bit.ly/39212sF
3. If a larger room is available, submit a Room Change Request form https://www.csusm.edu/par/acdsched/roomchange.html
4. If the class is in fact overenrolled and there are no available rooms, that is a *serious* problem and you need to let us know immediately.
   - This would require us to inconvenience other faculty and trade them out. This really should not happen anymore because we limit the number of permission numbers to curb this, but… it can still happen.
5. What can you do if there are no rooms available and the FACULTY insists on moving the class?
   - Run a query and filter it to the class days, start times and end times of the class that needs to move.
   - Limit the *RmSize* to Greater than or Equal to the room size the FACULTY wants
   - Limit the *Cap* size to Less than or Equal to the current room size of class you are trying to move.
   - Remove the classes that are in specialized space, like labs or the Arts rooms.

Subject	Catalog	Section	Class Nbr	Descr	Prof Name	Cap	Enrl	Facil ID	RmSz	Day(s)	Start	End
GBST	433	01	42418	ELECTION VIOLENCE IN AFRICA	[redacted]	20	4	SBSB 1105	48	TR	1:00 PM	2:15 PM
MATH	1	24	40731	SUPPORT FOR QUANT REASONING	STAFF	20	2	MARK 310	60	TR	1:00 PM	2:15 PM

   - Example (in the table above): For these restrictions, you get TWO classes that meet the criteria. They are both low caps, start with the lowest catalog number, in this case MATH 1. Because the professor's name is not provided (i.e. STAFF), the FACULTY will have to ask the department chair and AC if this swap can be made.
   - The FACULTY can send an email to those folks and see if they are willing.

- If the FACULTY gets an "okay, switch them" response, have them submit the Room Change Request and note that the Chair/AC/Professor (include their name) has agreed to the switch.
- If they will not allow the switch, the FACULTY can email the next professor. And return to #7 and begin again.

What does my Department Chair mean?

Stop Enrollment actually/usually means: Make class Tentative - use *Enrollment Control Form.*

Close Class actually/usually means:

- Reduce class capacity to current enrollment number - use *Change the Cap/Time/Day Request Form*.
  OR
- Change class to Tentative - use *Enrollment Control Form*.

Change class time means what you think it means, but it matters whether there are any students enrolled.

- If no students are enrolled - use *Change the Cap/Time/Day Request Form*.
- If students are enrolled - use *Section Cancel Form* to cancel original class & use *Section Add Form* to add the class with changed time to the class schedule. Make sure faculty, dept chair, and AD are okay with this.

Swap Class actually/usually means: cancel current class and add a different one.

- Cancel current class – *use Section Cancel Form* AND add new class – use *Section Add Form***.**
- Example: swap ANTH 100 for ANTH 201. There is no "swapping" in PeopleSoft, the original class needs to be cancelled and a new class added.

Faculty cannot see classes could mean a variety of different things. It usually helps to ask them to send a screenshot of what they are seeing. Possible issue:

- The faculty might be looking at the wrong term.

- The faculty may not be assigned to every meeting pattern of their class. Check in Schedule Class meetings to see if they are assigned to every meeting pattern.
- The faculty might be looking at the public class schedule. This could mean that when they did a search they did not uncheck the "Open classes only" box and their closed class then does not appear. Or the class may be Schedule Print Off, which would then not allow the class, open or closed, to be viewable on the public schedule.
- If the faculty are looking in their Faculty Center at their classes, make sure they have clicked on "View All." This is an issue especially when they have multiple classes or their classes have multiple meeting patterns

Hide my class actually/usually means: turn Schedule Print Off - use *Enrollment Control Form*.

Provide/Run the Class Schedule actually/usually means: run a query of the department(s) or program(s).

Run a Query actually/usually means: go into PSoft and run a spreadsheet of the class schedule typically for your department(s) or program(s). *Queries can also provide major/minor lists, WTU listings, rosters, and more.*

- Route in PSoft: Main Menu > Reporting Tools > Query > Query Viewer
- In Query Viewer: Search By **Folder** (this is one of the dropdown options) and begins with **ACDSCHED**
  - The ACDSCHED query folder has queries you can run at any time based on the Department or Full (University-wide, all classes)
  - Generally, using the "Excel" link/option is best.
- **WARNING**: Before you send the query out, CLEAN IT UP. Almost all queries have duplicate rows. Delete any of the columns that are not needed and then use the "Delete Duplicates" option.

Description for Headers in Common Academic Scheduling Queries

Typically Keep?	Header	Explanation and Information
No	**College**	College the Class is in - CHABSS, COBA, CEHHS, CSTEM, OUGS
No	**Dept**	Department Name
Yes	**Subject**	Subject Acronym

Yes	**Catalog**	Catalog Number
Yes	**Section**	Section Number. 2 digits with a proceeding zero for 1-9. If section is 900 or above, the section is an EL class, do NOT touch or modify these sections at all. Delete EL sections from the query when sending to your dept chair.
Yes	**Class Nbr**	5 digit number that is unique to each section in a semester (in Spring always begins with a "2", in Fall always begins with a "4", summer is "3"). May want to select this row use "Conditional Formating" > "Highlight Cells Rule" > "Duplicate Values" - this allows anyone looking at your spreadsheet to identify the classes with duplicate rows
No	**Pat Nbr**	The number of meeting patterns a class has.
Yes	**Descr**	Class Title
Yes	**Component**	LEC (Lecture), LAB (Laboratory), ACT (Activity), LE2 (Second Lecture), PER (Performance), DIS (Discussion), etc. Only need if department has multiple-component classes
Yes	**Enrl Type**	Enrollment or Non-Enrollment
No	**Assoc**	Associate Class Number. For single component class, should match the section number without a preceeding zero.
No	**Auto Enrol**	If value is listed this is a multiple component class.
No	**Auto Enr 2**	If value is listed this is a multiple component class with 3 sections that make up the class.
Yes	**Sch Print**	If OFF or "N" the class will not show on the Public Class Schedule. Students can search for it if they have the class number.
Yes	**Combined**	Indicates if the class is attached/combined/cross-listed with another class
Yes	**Class Status**	ACTIVE, TENTATIVE, or CANCELLED. May want to delete the cancelled sections for Chair.
Yes	**Add Consent**	If it is Department or Instructor Consent Required, then student will need a permission number to enroll in the class. May want to delete the cancelled sections for Chair.
No	**Drop Consent**	Do NOT USE
Yes	**Instr Mode**	Type of Instruction: Online, In Person, Hybrid, Independent Study, Other
Yes	**Display Name**	Preferred name of the faculty assigned to the section. If there is no one assigned it will either be blank or say STAFF
No	**Print**	If "N" faculty names will not show in the public class schedule.
No	**Role**	Primary Instructor, Secondary Instructor, or TA
No	**Access**	Should always and only be APPROVE (unless you have been specifically told your Teacher's Assistants should have GRADE access)
No	**RqRmSz**	Requested Room Size, this is the size of room that the optimizer will place the class into.
Yes	**Cap**	Capacity, Number of Students that can enroll in the in the section/class.
Yes	**Enrl**	Enrollment, Number of Students that are enrolled in the section/class.
No	**Wait Cap**	Any number, except 0, indicates there is a Wait List; however, should always be 999 which means the wait list is unlimited
Yes	**Waiting**	Number of students on the wait list.
No	**Auto Enrol**	If there is a wait list, this should always be "Y" as it will allow an eligible wait listed student to be enrolled in the class automatically when another student drops.
No	**Min Units**	Total Number of Units of the Class
No	**Comp Units**	Total Number of Units of the Component. This is different than the "Min Units" when there is more than one component. Like a lecture and a lab for the class.
Yes	**Facil ID**	Room
Maybe	**RmSz**	Number of student seats in the room (room size does not include the faculty). Staff can use this to see if the cap can be increased, make sure to check if there is more than 1 rooms assigned to the class.
No	**Type**	Type of Room
Yes	**Session**	1 = Full Session, 8W1 = First 8 Weeks (half semester), 8W2 = Second 8 Weeks (half semester)
Maybe	**Start Date**	First Date of the Meeting Pattern. This defaults to the first date of the Session. Use if any classes have multiple meeting patterns.

Maybe	**End Date**	Last Date of the Meeting Pattern. This defaults to the last date of the sesssion. Use if any classes have multiple meeting patterns.
Yes	**Day(s)**	Weekday(s) the class meets [Meeting Pattern indicates the Day(s), Start & End Times for the class - there are Approved Class Meetings times that need to be followed, see website for list]
Yes	**Start**	Start time of the class [Meeting Pattern indicates the Day(s), Start & End Times for the class - there are Approved Class Meetings times that need to be followed, see website for list]
Yes	**End**	End time of the class [Meeting Pattern indicates the Day(s), Start & End Times for the class - there are Approved Class Meetings times that need to be followed, see website for list]
No	**CS**	01-78 Number is a part of the Course Classification System
No	**Course ID**	Every course in the catalog has a unique Course ID value.
No	**SqNbr**	Indicates which note is being referred to next
Maybe	**Class Note**	If a class has a free format note, it will be shown here. If you want to look at the notes attached to the class, not generally needed unless you are reviewing the notes
No	**Note Nbr**	If a class has a canned note (these are already in the system), this will be the number associate with that canned note.
Maybe	**Canned Note**	If class has canned note, this is the Text of that canned note. If you want to look at the notes attached to the class, not generally needed unless you are reviewing the notes
No	**Acad Org**	This is the Academic Org associated with this class.

Other Useful Guides

Using 25Live to locate an available room, please go to the:
"**Guide to finding an available classroom**" on
the Academic Scheduling Process Guides page
(https://www.csusm.edu/par/acdsched/processguides.html)