

Course Catalog, Class Search, and Enrollment Appointments

Training Guide for Stern



New York University
ALBERT SIS

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Course Catalog: Create a new course

Step 1: Navigate to: Curriculum Management> Course Catalog> Course Catalog

Step 2: Go to the Add a New Value tab. Leave the Course ID:000000 and click the Add button

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Menu

- Course Catalog
 - Browse Catalog
 - Course Catalog
 - HESA Module Details
 - HESA Dummy Module Details
 - Print Course Catalog
 - Course Equivalencies
 - Catalog Summary
 - Course Catalog Search
- Schedule of Classes
- Roll Curriculum Data

Course Catalog

Find an Existing Value Add a New Value

Course ID 000000

Add

Step 3: Go to the Offerings tab

- Fill in Academic Group, Subject Area, Campus, Academic Career, and Course Approval.
- Update Allow Course to be Scheduled, Catalog Print, Print Instructor in Schedule, Schedule Print and Schedule Term Roll as appropriate.

Catalog Data Offerings Components GL Interface

Course ID: 000000

Find | View All First 1 of 1 Last

Effective Date: 01/16/2018 Status: Active

Description:

Course Offering

Find | View All First 1 of 1 Last

*Course Offering Nbr 1 *Catalog Nbr: 1234 ACCT-GB

*Academic Institution NYUNV New York University

*Academic Group GB Stern Schl of Business GR

*Subject Area ACCT-GB Accounting

Campus WS Washington Square

*Academic Organization GBACCT Accounting, Taxation and Busin

*Academic Career BUSN Stern Schl Business-Grad Div

Course Typically Offered

Tuition Group

Dynamic Class Date Rule

Allow OEE Enrollment

*Course Approved: Approved

Approval Date

Allow Course to be Scheduled: ☒

Exam Only Course: ☐

☒ Catalog Print

☒ Print Instructor in Schedule

☒ Schedule Print

☒ Schedule Term Roll

☐ Use Blind Grading

☐ GL Interface Required

☐ Split Ownership

Course Academic Item

- If this course shares the same requisites as other courses, click on the magnifying glass to select the appropriate requirement group. Otherwise, a new Enrollment Requirement group will need to be created.

Enrollment Requirement Group

Requirement Group MBA & ACCT-GB 3304 ACCT-GB [Detail](#)

Long Description Prerequisite: MBA student and ACCT-GB 3304.
Not open to students with more than 24 ACCT-GB units.

Step 4: Go to the Catalog Data tab

- The Effective Date will automatically populate as the current date. Use the First Term Active field to update to the appropriate effective date for the term start. Note: the course must be active on or before the term begin date to be scheduled in that term.

Catalog Data | Offerings | Components | GL Interface

Course ID 000000 Find | View All First 1 of 1 Last

First Term Active Summer 2018

*Effective Date *Status Course Offering 1 of 1

*Description ACCT-GB 1234

Long Course Title

Long Description

- Once you fill in Minimum Units, all of the other fields will auto-populate. If it's a variable unit course change the maximum unit values
- Course Grading: select the appropriate Grading Basis from the drop down menu

| Grading Basis | Description | Notes |
|---------------|---------------------------|--|
| GB Graded | Grad Stern Graded | These grades are included in the GPA |
| GB No GPA | Grad Stern Graded No GPA | Letter grades not included in the GPA. |
| GB P/F Opt | Grad Stern Pass/Fail | Pass/Fail, Fail is included in the GPA |
| GB P/F Exe | Grad Stern Pass/Fail Exec | Executive MBA grades, no included in GPA |

| Course Units/Hours/Count | |
|---|------|
| Minimum Units | 3.00 |
| Maximum Units | 3.00 |
| Academic Progress Units | 3.00 |
| Financial Aid Progress Units | 3.00 |
| <input type="checkbox"/> Last Course of Mult Term Seq | |
| *Enrollment Unit Load Calc Type Actual Units | |
| Course Count | 1.00 |
| Course Contact Hours | 0.00 |

| Course Grading | |
|--------------------------|-------------------------------|
| *Grading Basis GB Graded | *Grade Roster Print Component |
| Graded Component: | |

- If a course can be repeated for credit, check the repeat for credit box to make the other fields available to be updated.
- You will also need to enter the total units allowed and the total completions allowed.
 - The total units will default to the number of units the course is worth and the total completions defaults to 1. Be sure that the total units and total completions complement each other; for example, if a student can take a 4 unit class 3 times, the total units allowed should be set to 12.
- If you selected Repeat for Credit, you can then elect to select the Allow Multiple Enroll in Term checkbox if students are permitted to enroll in this course more than once in a given term.

| Repeat for Credit Rules | |
|--|-----------------------------|
| <input checked="" type="checkbox"/> Repeat for Credit | Total Units Allowed 3.00 |
| <input type="checkbox"/> Allow Multiple Enroll in Term | Total Completions Allowed 1 |

- For the Additional Course Information section, select the appropriate values from the drop down menus if it is something other than the defaults.

| Additional Course Information | | |
|-------------------------------|-----------------------------|--|
| *Instructor Edit | No Enrollment Choice | |
| *Add Consent | No Special Consent Required | |
| *Drop Consent | No Special Consent Required | |
| Requirement Designation | | |
| Equivalent Course Group | | |

- Use the magnifying glass icon to search for the appropriate Course Attribute. All Grad Stern attributes start with 'b'. Then use the magnifying glass to select the appropriate Course Attribute Value. Insert additional rows using the + button as needed.

| Course Attributes | | Personalize Find [Icons] | | First | 1 of 1 | Last |
|-------------------|------------------------------|------------------------------|-------------|-------|--------|------|
| *Course Attribute | Description | *Course Attribute Value | Description | | | |
| BSPL | Grad Business Specialization | BACT | Accounting | | | |

☐ Override Topic Link ID

- If it is a topics course, populate Course Topics.
 - To add more topics, use the + button to insert more rows. Each of the three description fields are required; however, once you populate the Description field, upon saving the page the short and formal descriptions will populate.
 - Note that you have the option of editing the short and formal descriptions. When a course is scheduled, the topics entered here will become available to end users as a lookup selection.

| Course Topics | | | | | Personalize Find [Icons] | | First | 1-2 of 2 | Last |
|------------------|-----------------------|--------------------|---------------------------------------|---------------|------------------------------|--|-------|----------|------|
| | Description | Repeat For Credit | | | | | | | |
| *Course Topic ID | *Description | *Short Description | *Formal Description | Topic Link ID | | | | | |
| 1 | Fun with videos | Video | Stern Fun with Training Guides: Fun w | | | | | | |
| 2 | Department Enrollment | DEPTENR | Stern Fun with Training Guides: Depar | | | | | | |

Step 5: Go to the Components tab

- Fill in Course Component and Final Exam
 - Optional: update the Default Section Size if needed
 - If Yes for final exam, update the Exam Seat Spacing as needed.

| Catalog Data | Offerings | Components | GL Interface |
|---|-----------|--|------------------------|
| Course ID 000000 | | | |
| Effective Date 05/02/2018 | | Status Active | Course Offering 1 of 1 |
| Description Test Stern Fun | | ACCT-GB 1234 | |
| Course Component Find View All First 1 of 1 Last | | | |
| *Course Component Lecture Instructor Contact Hours <input type="text"/> Default Section Size <input type="text" value="30"/> Workload Hours <input type="text"/> OEE Workload Hours <input type="text"/> *Final Exam Yes Exam Seat Spacing <input type="text" value="1"/> Provider for Authentication <input type="text"/> LMS Extract File Type <input type="text"/> | | <input type="checkbox"/> Auto Create <input checked="" type="checkbox"/> Graded Component <input checked="" type="checkbox"/> Primary Component <input type="checkbox"/> Optional Component <input type="checkbox"/> Generate Class Mtg Attendance <input type="button" value="Add Fee"/> | |

Step 6: Click the Save button

- A Course ID number will be automatically generated

Update an Existing Course

Step 1: Navigate to: Curriculum Management> Course Catalog> Course Catalog

Step 2: Fill in the appropriate fields and click Search

Course Catalog

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Academic Institution

Subject Area

Catalog Nbr

Campus

Course ID

Description

☒ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Step 3: Select the appropriate course, then click the + button

[Catalog Data](#) [Offerings](#) [Components](#) [GL Interface](#)

Course ID 203451

Find | View All First 1 of 6 Last

*Effective Date *Status

*Description

Long Course Title

Long Description

Course Offering 1 of 1

ACCT-GB 2120

Step 4: Enter the First Term Active (the first term you want the change to become effective)

- Effective Date will auto-populate based on the selected term

The screenshot shows a web interface for managing course data. At the top, there are tabs for 'Catalog Data', 'Offerings', 'Components', and 'GL Interface'. Below these, the 'Course ID' is set to '203451'. A search bar contains 'First Term Active' and '1184', with a dropdown menu showing 'Spring 2018'. Below the search bar, there are fields for '*Effective Date' (12/19/2017), '*Status' (Active), and 'Course Offering' (1 of 1). The '*Description' field contains 'ENTERTAINMENT LAW'. Below this, the 'Long Course Title' is 'ENTERTAINMENT LAW' and the 'Long Description' is 'This course focuses on the entertainment aspects of mass media. Major topics include the limits of a free press and the balance between the right to publish and the right to privacy, torts, and other laws.'

Step 5: Make the appropriate updates and save

Step 6: Proceed to Course Roll instructions if the course you changed has already been scheduled for the effective term or later

Course Roll

***You only need to do this if the course you changed has already been scheduled for the effective term or later

- Not every field on the Course Catalog can be updated via Course Roll.
- Additional changes, ie Course Units, must be changed on the Adjust Class Associations page.

Step 1: Navigate to: Curriculum Management> Roll Curriculum Data Forward> Course Roll

Step 2: Fill in the necessary fields to find the course and click Search

Course Roll

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Academic Institution

Term

Subject Area

Catalog Nbr

Academic Career

Campus

Description

Course ID

Course Offering Nbr

Academic Organization

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Step 3: Click the Course Roll button

Course Roll

BEFORE

Course ID 100553 FINANCIAL STATEMENT Status Active

Institution NYUNV New York University Eff Date 12/19/2017

Term 1184 2018 Spr Term Begin Date: 01/02/2018

Subject Area ACCT-GB Accounting Career BUSN Stern-Grad

Catalog Nbr 2303 Acad Group GB Stern -Grd [Course Roll](#)

| Class Sections | | | | | | | | | |
|----------------|--------|------|---------|----------------|-----------|---------|---------|---------|--------------------------|
| Institution | Career | Term | Session | Academic Group | Class Nbr | Subject | Catalog | Section | Description |
| NYUNV | BUSN | 1184 | DFT | GB | 22120 | ACCT-GB | 2303 | 20 | FINANCIAL STATEMENT ANAL |
| NYUNV | BUSN | 1184 | EFT | GB | 22121 | ACCT-GB | 2303 | 30 | FINANCIAL STATEMENT ANAL |
| NYUNV | BUSN | 1184 | EFT | GB | 22122 | ACCT-GB | 2303 | 99 | FINANCIAL STATEMENT ANAL |

[Save](#) [Return to Search](#) [Notify](#)

Course Roll

AFTER

Course ID 100553 FINANCIAL STATEMENT Status Active

Institution NYUNV New York University Eff Date 12/19/2017

Term 1184 2018 Spr Term Begin Date: 01/02/2018

Subject Area ACCT-GB Accounting Career BUSN Stern-Grad

Catalog Nbr 2303 Acad Group GB Stern -Grd [Course Roll](#)

| Class Sections | | | | | | | | | |
|----------------|--------|------|---------|----------------|-----------|---------|---------|---------|---------------------|
| Institution | Career | Term | Session | Academic Group | Class Nbr | Subject | Catalog | Section | Description |
| NYUNV | BUSN | 1184 | DFT | GB | 22120 | ACCT-GB | 2303 | 20 | FINANCIAL STATEMENT |
| NYUNV | BUSN | 1184 | EFT | GB | 22121 | ACCT-GB | 2303 | 30 | FINANCIAL STATEMENT |
| NYUNV | BUSN | 1184 | EFT | GB | 22122 | ACCT-GB | 2303 | 99 | FINANCIAL STATEMENT |

[Save](#) [Return to Search](#) [Notify](#)

Step 4: Click Save

Step 5: Proceed to Class Roll instructions if students had enrolled in the course prior to the change

Class Roll

***You only need to do this if students had enrolled in the course prior to the change.

Step 1: Navigate to: Curriculum Management> Schedule of Classes> Adjust Class Associations

Step 2: Fill in the necessary fields to find the course you updated

Adjust Class Associations

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

| | | | |
|----------------------|-------------|------------------------------|--|
| Academic Institution | = | NYUNV | |
| Term | = | 1184 | |
| Subject Area | = | ACCT-GB | |
| Catalog Nbr | begins with | 2303 | |
| Academic Career | = | Stern Schl Business-Grad Div | |
| Session | = | | |
| Course ID | begins with | | |
| Course Offering Nbr | = | | |
| Description | begins with | | |

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Step 3: Select the appropriate session (if there is more than one)

Search Clear Basic Search Save Search Criteria

Search Results

| View All | | First 1-2 of 2 Last | | | | | | |
|----------------------|------|---------------------|-------------|-----------------|-----------|-----------|---------------------|---------------------|
| Academic Institution | Term | Subject Area | Catalog Nbr | Academic Career | Session | Course ID | Course Offering Nbr | Description |
| NYUNV | 1184 | ACCT-GB | 2303 | Stern-Grad | GB Day FT | 100553 | 1 | FINANCIAL STATEMENT |
| NYUNV | 1184 | ACCT-GB | 2303 | Stern-Grad | GB Eve FT | 100553 | 1 | FINANCIAL STATEMENT |

Step 4: When you make changes and then “tab out” of the field, you will get the message below if students are enrolled in the course:

- Click “OK.” To update the grading basis, you will need to navigate to the “class components” tab. Update as necessary and click “Save”.

The screenshot shows the 'Class Associations' form. A modal message box is displayed in the center with the following text: 'Warning -- Students are Enrolled / Wait Listed in class sections belonging to this Class Association. (14610,12)' and 'Changing this data will not change the data for students already enrolled/Wait Listed in sections in this association.' Below the message is an 'OK' button. The background form shows fields for 'Associated Class 2', 'Minimum Units' (1.50), 'Maximum Units' (3.00), 'Academic Progress Units' (1.50), and 'FA Units' (1.50). At the bottom, there are 'Save' and 'Return' buttons, and a breadcrumb trail: 'Class Associations | Class Components | Class Requisites'.

Step 5: Click the Class Roll button

The screenshot shows the 'Class Associations' form with the 'Class Roll' button highlighted by a red rectangle. Above the form, course details are listed: 'Course ID 100553', 'Course Offering Nbr 1', 'Academic Institution New York University', 'Term Spring 2018', 'Stern-Grad', 'Subject Area ACCT-GB', 'Accounting', 'Catalog Nbr 2303', 'FINANCIAL STATEMENT', 'Session EFT', and 'GB Evening Full Term'. The form itself contains fields for 'Associated Class 2', 'Minimum Units' (1.50), 'Maximum Units' (3.00), 'Academic Progress Units' (1.50), 'FA Units' (1.50), 'Course Count' (1.00), 'Course Contact Hours' (43.20), 'Billing Factor' (1.000), 'Tuition Group' (with a search icon), and '*Instructor Edit' (set to 'No Enrollment Choice'). There is also a 'Use Blind Grading' checkbox. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. A breadcrumb trail at the bottom reads: 'Class Associations | Class Components | Class Requisites'.

Step 6: Copy the Enrollment Request ID and click OK

The screenshot shows the 'Class Associations' page in a web application. At the top, there are tabs for 'Class Associations', 'Class Components', and 'Class Requisites'. Below the tabs, course details are listed: Course ID 100553, Course Offering Nbr 1, Academic Institution New York University, Term Spring 2018, Subject Area ACCT-GB, Catalog Nbr 2303, and Session EFT. A 'Class Roll' button is visible. A message dialog box is open in the center, displaying the following text: 'Enrollment Request 0027710181 has been generated. Go to the Block Enrollment page to process the request. (14600,416)' and 'Student enrollment transactions rolling from the Class Table have been generated. To process the transactions, go to the Block Enrollment page and initiate the request.' The dialog box has an 'OK' button. In the background, the 'Class Associations' table is partially visible, showing 'Associated Class 2', 'Minimum Units 1.50', and 'Maximum Units 3.00'.

Step 7: Navigate to: Records and Enrollment> Enroll Students> Block Enrollment> Block Enroll Merge

Step 8: Paste or enter the Enrollment Request ID then click Search

The screenshot shows the 'Block Enroll Merge' search page. At the top, there is a title 'Block Enroll Merge' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. A purple bar with the text 'Search Criteria' is visible. Below the bar, there are several search criteria fields: 'Enrollment Request ID' (beginning with 0027710181), 'ID' (beginning with), 'Academic Career' (equals), 'Academic Institution' (beginning with), 'Term' (beginning with), 'Class Nbr' (equals), 'User ID' (beginning with), 'Campus ID' (beginning with), 'National ID' (beginning with), 'Last Name' (beginning with), and 'First Name' (beginning with). There is a 'Case Sensitive' checkbox. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step 9: Click the Submit button

Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Enrollment Request ID 0027710181 Request Status Pending **Submit**

Merge Blocks

Academic Institution NYUNV New York University Merge

Student Block
Detail / Create

Class Block
Detail / Create

Filtering Criteria

Academic Career Retrieve

Term

Class Nbr Detail Status

ID

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Step 10: If the Request Status is anything other than Success, use the Filtering Criteria to retrieve the Enrollment Requests that were not successful.

Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Enrollment Request ID 0027710181 Request Status **Success** **Submit**

Merge Blocks

Academic Institution NYUNV New York University Merge

Student Block
Detail / Create

Class Block
Detail / Create

Filtering Criteria

Academic Career Retrieve

Term

Class Nbr Detail Status

ID

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2

Class Search

Step 1: Navigate to: NYU Modifications> NYU Student Records> Course Search

Course Search [Help](#)

Academic Year 2015-2016 **Academic Year** 2016-2017 **Academic Year** 2017-2018

Search through:
Subject, Catalog Number, Title & Instructor Names Search Course Description (may take a while to process) Search

| | |
|--|--|
| Academic College Sciences Po Courses (SCIP) University of Ghana Courses (UNGHG) | School ▼ |
| Center for Urban Science and Progress Ctr for Urban Sci and Progress (CUSP-GX) | Terms Offered Uncheck all boxes for all terms <input type="checkbox"/> Fall 2017 <input type="checkbox"/> January 2018 <input type="checkbox"/> Spring 2018 |
| College of Arts and Science Advanced Honors Seminars (AHSEM-UA) Africana Studies - Social and Cultural Analysis (SCA-UA_1) American Studies - Social and Cultural Analysis (SCA-UA_2) Animal Studies (ANST-UA) Anthropology (ANTH-UA) Art History (ARTH-UA) Asian/Pacific/American Studies - Social and Cultural Analysis (SCA-UA_3) Biology (BIOL-UA) CAS Scholars Program (SCHOL-UA) Chemistry (CHEM-UA) Child/Adoles Mental Hlth Stds (CAMHS-UA) Child/Adoles Mental Hlth Stds (CAMS-UA) Classics (CLASS-UA) College Core Curriculum (CORE-UA) Comparative Literature (COLIT-UA) Collegiate Seminar Program (COSEM-UA) Computer Science (CSCI-UA) | Session Class Units Academic Career Component Instruction Mode Course Location/Study Away Site |

Step 2: Select the Academic Year, School, Term, and Academic Career to find Graduate Stern courses.

- Other available filters are session, class units, component, and instruction mode.

Course Search [Help](#)

Academic Year 2015-2016 **Academic Year** 2016-2017 **Academic Year** 2017-2018

Search through:
Subject, Catalog Number, Title & Instructor Names Search Course Description (may take a while to process) Search

| | |
|--|---|
| Leonard N. Stern School of Business Accounting (ACCT-GB) Business & Society (BSPA-GB) Consortium Courses (CONS-GB) Core Course (COR1-GB) Core Course, capstone (COR2-GB) Economics (ECON-GB) Finance (FINC-GB) Information Systems (INFO-GB) Interarea (INTA-GB) Maintenance (MAINT-GB) Management (MGMT-GB) Management Communications (MCOM-GB) Marketing (MKTG-GB) Non-Credit (NOCR-GB) Operations Management (OPMG-GB) Statistics & Operations Rsrch (STAT-GB) | School Leonard N. Stern School of Business ▼ |
| | Terms Offered Uncheck all boxes for all terms <input checked="" type="checkbox"/> Fall 2017 <input type="checkbox"/> January 2018 <input type="checkbox"/> Spring 2018 |
| | Session Class Units Academic Career Stern Schl Business-Grad Div ▼ |
| | Component Instruction Mode Open/Closed/Wait List Classes Course Location/Study Away Site |

Step 3: Select a subject, then expand a class to view the details, including Class Status and Notes

Course Search [Help](#)

Academic Year 2015-2016 Academic Year 2016-2017 Academic Year 2017-2018

Search through:
Subject, Catalog Number, Title & Instructor Names Search Course Description (may take a while to process) Search Return to browse by subject

1 - 2 results for: STAT-GB | Total Class Count: 2

STAT-GB 2308 APPL STOCHASTIC PROC FINC
APPL STOCHASTIC PROC FINC
Leonard N. Stern School of Business

Click here to learn more: | Term/s Filter: Fall 2017

Fall 2017
STAT-GB 2308 | 3 units | Class#: 21185 | Session: EFT 09/26/2017 - 12/19/2017 | Section: 10
Requires Department Consent
Class Status: Open | Grading: Grad Stern Graded | Instruction Mode: In-Person
Course Location: Washington Square | Component: Lecture
09/26/2017 - 12/19/2017 Tue 6:00 PM - 9:00 PM at KMEC 5-90 with Lakner, Peter
Notes: PREREQ: COR1-GB.1305

STAT-GB 3301 INTRO THEORY PROBABILITY
INTRO THEORY PROBABILITY
Leonard N. Stern School of Business

Click here to learn more: | Term/s Filter: Fall 2017

School
Leonard N. Stern School of Business

Terms Offered
Uncheck all boxes for all terms
☒ Fall 2017
☐ January 2018
☐ Spring 2018

Session

Class Units

Academic Career
Stern Schl Business-Grad Div

Component

Instruction Mode

Open/Closed/Wait List Classes

Course Location/Study Away Site

Time Offered

Days Offered

Enrollment Appointments

Create a New Enrollment Appointment

Step 1: Navigate to: Records and Enrollments> Term Processing> Appointments> Student Appointment Block

Step 2: Search for the BUSN Academic Career

Student Appointment Block

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Academic Institution begins with NYUNV

Academic Career begins with BUSN

Description begins with

Short Description begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Step 3: Insert a new row by clicking on the + button

The screenshot shows the 'Student Appointment Block' form. At the top, there are tabs for 'Student Appointment Block' and 'Processing Priorities'. Below these, the 'Academic Institution' is set to 'NYUNV' (New York University) and the 'Academic Career' is set to 'BUSN' (Stern Schl Business-Grad Div). The form has a header bar with 'Find | View All' and pagination 'First 1 of 2 Last'. The main form area has a label 'Student Appointment Block' with the value 'DAY 1'. Below it, the '*Description' field contains 'Day 1, Add/Drop'. At the bottom, there is a checkbox labeled 'Use Custom Selection' which is currently unchecked. A red circle highlights the '+ -' button in the top right corner of the form area.

Step 4: Enter a name/code for the Student Appointment Block, Description, and click Use Custom Selection. Then click Save.

The screenshot shows the 'Student Appointment Block' form with the following details: The 'Academic Institution' is 'NYUNV' and the 'Academic Career' is 'BUSN'. The header bar shows 'Find | View All' and pagination 'First 2 of 3 Last'. The '*Student Appointment Block' field is filled with 'SFUN'. The '*Description' field is filled with 'More Stern Fun'. The 'Use Custom Selection' checkbox is now checked. Below the main form, there is a table with columns '*ID' and 'Display Name'. The table is currently empty. At the bottom of the form, there are three buttons: 'Save', 'Return to Search', and 'Notify'. Below the buttons, the text 'Student Appointment Block | Processing Priorities' is displayed.

Step 5: Navigate to: NYU Modifications> NYU Student Records> Load Students into Appt Blocks

Step 6: Go to the Add a new value tab (or find an existing if already set up)

Load Students into Appt Block

The screenshot shows the 'Load Students into Appt Block' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there is a text input field labeled 'Run Control ID' with the value 'SFUN'. At the bottom, there is an 'Add' button.

Step 7: Enter Academic Career and the Student Appointment Block

Appointment Block Load

Run Control ID SFUN Report Manager Process Monitor Run

Required Parameters

*Academic Career: 

*Student Appointment Block: 

Step 7: Population Selection


- If you select external file, it needs to be a .csv and the first column must be emplid with no header

Population Selection

☒ Population Selection

Selection Tool

Attached File UY_Spring_2018_PERC_20180105.csv Upload File Delete File View File


File Mapping  Edit File Mapping Preview Selection Results

- If you select PS Query, use the magnifying glass to select the appropriate query

Population Selection

☒ Population Selection

Selection Tool

Query Name  Launch Query Manager Preview Selection Results

Save Notify Add Update/Display

Step 8: Click Run, then click OK, and then click Process Monitor

Appointment Block Load

Run Control ID SFUN Report Manager Process Monitor Run

Process Instance:14401549

Step 9: Click Refresh until the Run Status= Success and Distribution Status= posted. Then click the Details link.

View Log/Trace

Report

Report ID 10409169 Process Instance 14401549 [Message Log](#)
 Name NYU_APPT_BLK Process Type Application Engine
 Run Status Success

NYU_APPT_BLK

Distribution Details

Distribution Node ps-https Expiration Date 03/18/2018

File List

| Name | File Size (bytes) | Datetime Created |
|--|-------------------|---------------------------------|
| AE_NYU_APPT_BLK_14401549.log | 220 | 01/17/2018 8:55:31.784248AM EST |
| Student Appointment Block Insert_ERRORS.txt | 14,315 | 01/17/2018 8:55:31.784248AM EST |
| Student Appointment Block Insert_SUCCESS.txt | 248 | 01/17/2018 8:55:31.784248AM EST |

Distribute To

| Distribution ID Type | *Distribution ID |
|----------------------|------------------|
| User | ms10172 |

[Return](#)

Step 10: View the success file and the error file

- The number of students in the success file should match the number of students in the file or query you used.

```

----- Student Appointment Block Insert -----
----- ERROR Report -----

*****
----- Run control parameters: -----
Career: BUSN | Appointment Block: SFUN

----- Student Appointment Block Insert -----
----- SUCCESS Report -----

*****
----- Run control parameters: -----
Career: BUSN | Appointment Block: SFUN

Career: BUSN | Student: 10019905 | Name: [REDACTED], Dominic V. | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10020294 | Name: [REDACTED], Shante L. | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10027245 | Name: [REDACTED], Ilkhalid | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10033718 | Name: [REDACTED], Christina T. | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10046121 | Name: [REDACTED], Alan A. | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10051941 | Name: [REDACTED], Xiaohua | N-id: [REDACTED] - SUCCESS.
Career: BUSN | Student: 10052287 | Name: [REDACTED] Young | N-id: [REDACTED] - SUCCESS.

```

Step 11: Return to the Student Appointment Block to validate (Records and Enrollments> Term Processing> Appointments> Student Appointment Block)

*Continue to Appointment Table

Student Appointment Block Processing Priorities

Academic Institution NYUNV New York University
Academic Career BUSN Stern Schl Business-Grad Div

Find | View All First 3 of 3 Last

Student Appointment Block SFUN

*Description More Stern Fun

☒ Use Custom Selection

| *ID | Display Name | | |
|-----|---------------|---|---|
| | Dominic V. C. | + | - |
| | Shante L. | + | - |
| | Ilkhalid | + | - |

Find an Existing Enrollment Appointment

Step 1: Navigate to: Records and Enrollments> Term Processing> Appointments> Student Appointment Block

Step 2: Check the Use Custom Selection box and upload a file or use ps query

- Once the process is run, any students previously in the block will be removed and replaced with the new students from the file or query.

Appointment Table

Step 1: Navigate to: Records and Enrollment> Term Processing> Appointments> Appointment Table

Step 2: Fill in the appropriate fields and click Search

Appointment Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Academic Institution

Academic Career

Term

Description

Short Description

Term Begin Date

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Step 3: Determine which session will be the appointment control session. For all other sessions, set the appointment control session.

- Display in Self Service Enrollment Appointments checkbox controls when the student can see the appointment in Albert.
- 1 of 2 (First picture below): Session to which all appointments will be assigned

[Appointment Table](#) | [Enrollment Appointments](#) | [Validation Appointments](#)

Academic Institution NYUNV New York University

Academic Career BUSN Stern Schl Business-Grad Div

Term 1184 Spring 2018

Find | View All | First 1 of 2 Last

Session 1 Regular Academic Session

Appointment Control Session

Display in Self Service ☒ Enrollment Appointments ☐ Validation Appointments

Session Dates

| | |
|-----------------------------------|-----------------------------|
| Session Beginning Date 01/29/2018 | Session End Date 05/15/2018 |
| First Date to Enroll 11/22/2017 | Last Date to Enroll |
| Open Enrollment Date 11/22/2017 | |

[Save](#) [Return to Search](#) [Notify](#)

[Appointment Table](#) | [Enrollment Appointments](#) | [Validation Appointments](#)

- 2 of 2: shows how remaining sessions will be configured
- *Note that Appointment Control Session is populated

Appointment Table | Enrollment Appointments | Validation Appointments

Academic Institution NYUNV New York University
 Academic Career BUSN Stern Schl Business-Grad Div
 Term 1184 Spring 2018

Find | View All First 2 of 2 Last

Session S Special
 Appointment Control Session Regular Academic Session
 Display in Self Service ☒ Enrollment Appointments
☐ Validation Appointments

Step 4: Go to the Enrollment Appointments tab

- For the Appointment Control Session: enter an appointment block and a description
- You can create one block with three appointments (Day 1, 2, 3) OR three blocks with one appointment each

Step 5: Use the + button to add appointments

- For each appointment, enter an Appointment Number, Start Date/Time, End Date/Time, and the Number of Students per Appointment. Then click Save.

Appointment Table | Enrollment Appointments | Validation Appointments

Academic Institution NYUNV New York University
 Academic Career BUSN Stern Schl Business-Grad Div
 Term 1184 Spring 2018

Find | View All First 1 of 2 Last

Session 1 Regular Academic Session

Appointment Blocks Find | View All First 1 of 1 Last
 *Appointment Block DAY1 *Description Day 1 of Enrollment + -

Create Appointments

Appointments Personalize Find | View All First 1 of 1 Last

| Appt Nbr | Start Date | Start Time | End Date | End Time | Number of Students per Appt | Number of Students Assigned | |
|----------|------------|------------|------------|----------|-----------------------------|-----------------------------|-----|
| 0001 | 01/26/2018 | 8:00AM | 02/23/2018 | 1500 | 1000 | | + - |

Save Return to Search Notify

Appointment Table | Enrollment Appointments | Validation Appointments

Assign Appointments to Students

Step 1: Navigate to: Records and Enrollment> Term Processing> Appointments> Assign Appointments

Step 2: Enter an existing Run Control or Add a New Value

Assign Enrollment Appointment

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID

[Find an Existing Value](#) | [Add a New Value](#)

Step 3: Fill in Academic Institution, Academic Career, Term, Process Mode.

Step 4: Then select the Appointment Control Session from the Session dropdown menu.

- Select the 'Do not Allow Multiple Appts' checkbox

Assign Appointments

Run Control ID SFUN [Report Manager](#) [Process Monitor](#)

*Academic Institution New York University

*Academic Career Stern Schl Business-Grad Div

*Term Spring 2018

*Process Mode

☐ Create Communications

Find | View All First 1 of 1 Last

*Session

☒ Do not Allow Multiple Appts.

Step 5: Enter the Student Appointment Block

- Check the 'Use Program Term/Session Limit

Step 6: Enter the Appointment Block, Appointment Number From, and Appointment Number To.

- Insert additional rows as necessary. For example you could add Day 2 and Day 3 blocks to this run control.

*Student Appointment Block SFUN More Stern Fun

☐ Override Block Priorities

Priority Ranking 1
Priority Ranking 2
Priority Ranking 3

*Appointment Type Enrollment

☒ Use Program Term/Session Limit

*Appointment Block DAY1 Day 1 of Enrollment

Appointment Number From 0001 01/26/2018 8:00AM Find Appointment From

Appointment Number To 0001 Find Appointment To

Save Notify Add Update/Display

Step 7: Click Run, then click OK, and then click Process Monitor**Step 8: Click Refresh until the Run Status= Success and Distribution Status= posted. Click the Details link then View Log/Trace.****View Log/Trace**

| Report | | | |
|------------|----------|------------------|--------------------------------------|
| Report ID | 10409172 | Process Instance | 14401552 Message Log |
| Name | SRAPPT | Process Type | SQR Report |
| Run Status | Success | | |

Assign Students Appointment

| Distribution Details | | |
|----------------------|----------|----------------------------|
| Distribution Node | ps-https | Expiration Date 03/18/2018 |

| File List | | |
|---|-------------------|---------------------------------|
| Name | File Size (bytes) | Datetime Created |
| SQR_SRAPPT_14401552.log | 1,733 | 01/17/2018 1:36:55.392531PM EST |
| srapt_01.pdf | 2,878 | 01/17/2018 1:36:55.392531PM EST |
| srapt_02.pdf | 20,138 | 01/17/2018 1:36:55.392531PM EST |
| srapt_14401552.out | 459 | 01/17/2018 1:36:55.392531PM EST |

Step 9: View the .pdf files and the .out file to determine if there were any students that did not get appointments assigned

```

                                PeopleSoft
Report ID:  SRAPPT              ASSIGN APPOINTMENTS              Page No.  1
                                                                Run Date 01/17/2018
                                                                Run Time 13:36:41

Institution:    New York University
Academic Career: Stern Schl Business-Grad Div
Term:           Spring 2018
Session:        Regular Academic Session

Appointment Assignment Mode: Add Appointments
Do not Allow Multiple Appointments for a Student in This Session

Student Block:  SFUN More Stern Fun          Custom Student Selection
Appointment Type: Enrollment Appointment
Appointments assigned to 595 students
No Appointments found for 0 students
Appointments exist for 0 students

```

```

                                PeopleSoft
Report ID:  SRAPPT              ASSIGN APPOINTMENTS              Page No.  1
                                                                Run Date 01/17/2018
                                                                Run Time 13:36:41

Institution:    New York University
Academic Career: Stern Schl Business-Grad Div
Term:           Spring 2018
Session:        Regular Academic Session
Student Block:  SFUN More Stern Fun
Appointment Type: Enrollment Appointment

Appointment Assignment Mode: Add Appointments
Do not Allow Multiple Appointments for a Student in This Session
Custom Student Selection

10019905      Appointment assigned: DAY1      0001      Dominic V. Casamento
10051941      Appointment assigned: DAY1      0001      Xiaohua Liu
10123325      Appointment assigned: DAY1      0001      Neville Commissariat
10232692      Appointment assigned: DAY1      0001      Susan B. Kornfeld
10377756      Appointment assigned: DAY1      0001      Joana Kung
10500751      Appointment assigned: DAY1      0001      Raymond F. Conger
10643845      Appointment assigned: DAY1      0001      Guido F. Ditto
10726956      Appointment assigned: DAY1      0001      Angela M. Null

```

SRAPPT
Assign Appointments

Begin SRAPPT

Program Start: 17-JAN-2018 01:36:41.000000_PM

Add Appointments

Student Block: SFUN More Stern FunCustom Student Selection
Appointment Type: Enrollment Appointment
Appointments assigned to 595 students
No Appointments found for 0 students
Appointments exist for 0 students

Program End: 17-JAN-2018 01:36:48.000000_PM

End SRAPPT

View/Change a Student's Enrollment Appointment (optional)

Step 1: Navigate to: Record and Enrollment> Term Processing> Appointments> Student Enrollment Appointment

Step 2: Search for a student

- To change an existing appointment, change the Appt Nbr using the Find Appointment link
- To add an appointment, click the + button

Student Enrollment Appointment

Jonathan [redacted] N: [redacted] [redacted] ★ [redacted]

Academic Career: Stern Schl Business-Grad Div New York University
Term: Fall 2017

Session Limits Find | View All First 1 of 4 Last

Session 1 Regular Academic Session

☐ Only Use Term Limits
☐ Override Maximum Units

Max Total Units [text box] Max No GPA Units [text box]
Max Audit Units [text box] Max Wait List Units [text box]
Max Total Courses [text box]

Enrollment Appointments Find | View All First 1 of 1 Last

| *Appt Block | *Appt Nbr | Start Date | Start Time | End Date | End Time | Find Appointment | + - |
|-------------|-----------|------------|------------|------------|----------|------------------|-----|
| OPEN | 0001 | 04/24/2017 | 9:00AM | 09/01/2017 | 11:59PM | | |

Select Limits for Appointment

☒ Use Program Term/Session Limit
☐ Use Appointment Limit ID Limit ID [text box]
☐ Set Maximum Units
Max Total Units [text box] Max No GPA Units [text box]
Max Audit Units [text box] Max Wait List Units [text box]
Include Wait List in Total ☐

Validation Appointments Find | View All First 1 of 1 Last

| *Appt Block | *Appt Nbr | Start Date | Start Time | End Date | End Time | Find Appointment | + - |
|-------------|------------|------------|------------|----------|----------|------------------|-----|
| [text box] | [text box] | | | | | | |

Save Return to Search Previous in List Next in List Notify