# 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**

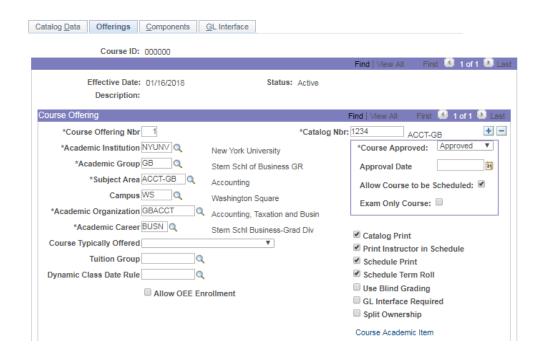
**Step 1**: Navigate to: Curriculum Management> Course Catalog> Course Catalog

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



# 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.

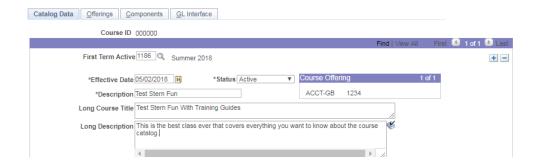


 If this course shares the same requisites as other courses, click on the magnifying glass to select the appropriate requirement group. Otherwise, a new Enrollment Requirement group will need to be created.



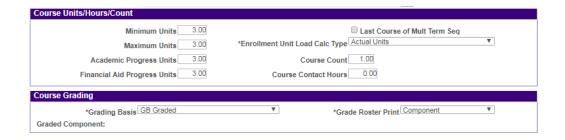
# Step 4: Go to the Catalog Data tab

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.



- 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

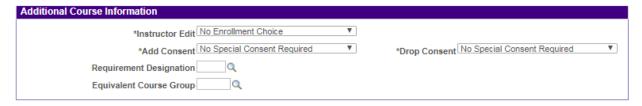
Grading Basis	Description	Notes
GB Graded	Grad Stern Graded	These grades are included in the GPA
	Grad Stern Graded No	
GB No GPA	GPA	Letter grades not included in the GPA.
GB P/F Opt	Grad Stern Pass/Fail	Pass/Fail, Fail is included in the GPA
		Executive MBA grades, no included in
GB P/F Exe	Grad Stern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



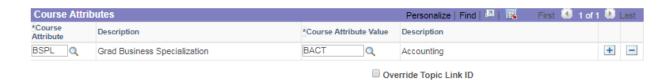
- If a course can be repeated for credit, check the repeat for credit box to make the other fields available to be updated.
- You will also need to enter the total units allowed and the total completions allowed.
  - The total units will default to the number of units the course is worth and the total 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.



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



 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.

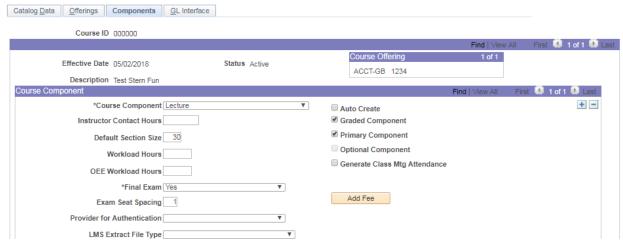


- If it is a topics course, populate Course Topics.
  - To add more topics, use the + button to insert more rows. Each
    of the three description fields are required; however, once you
    populate the Description field, upon saving the page the short
    and formal descriptions will populate.
  - 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.



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.



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

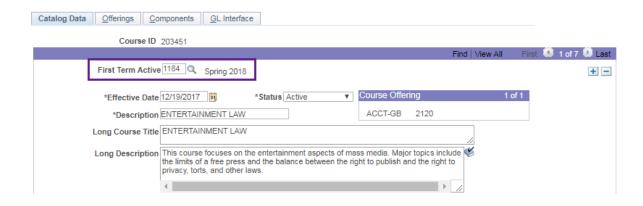
Course Catalog	
Enter any information you have and click Search. Leave field	ls blank for a list of all values.
Find an Existing Value Add a New Value	
<b>▼ Search Criteria</b>	
Academic Institution = ▼ NYUNV	Q
Subject Area = ▼ ACCT-GB	<u></u>
Catalog Nbr begins with ▼	
Campus begins with ▼	Q
Course ID begins with ▼	
Description begins with ▼	
✓ Include History	tive
Search Clear Basic Search Save Search	Criteria

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



**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



**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

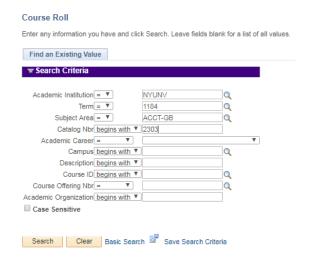
#### **Course Roll**

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

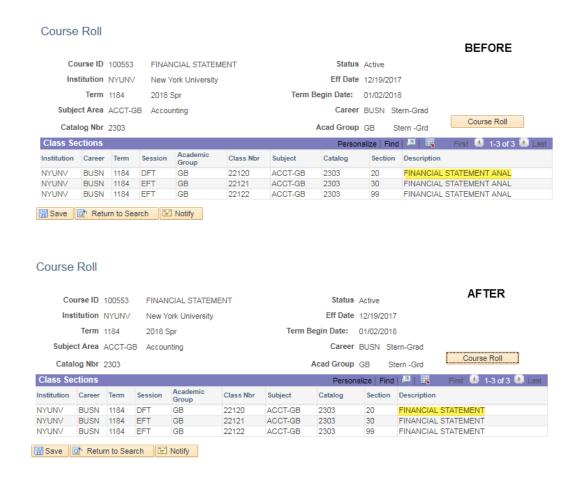
- Not every field on the Course Catalog can be updated via Course Roll.
- Additional changes, ie Course Units, must be changed on the Adjust Class Associations page.

**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



Step 3: Click the Course Roll button



Step 4: Click Save

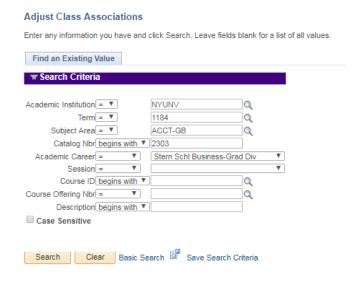
**Step 5**: Proceed to Class Roll instructions if students had enrolled in the course prior to the change

#### **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

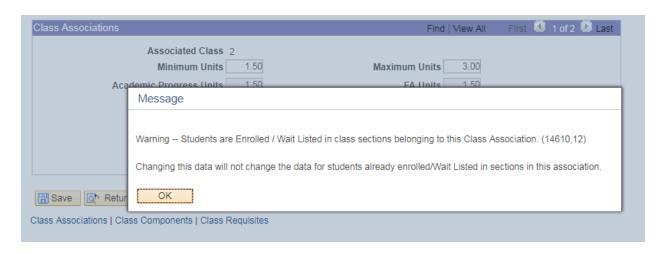


**Step 3**: Select the appropriate session (if there is more than one)



**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:

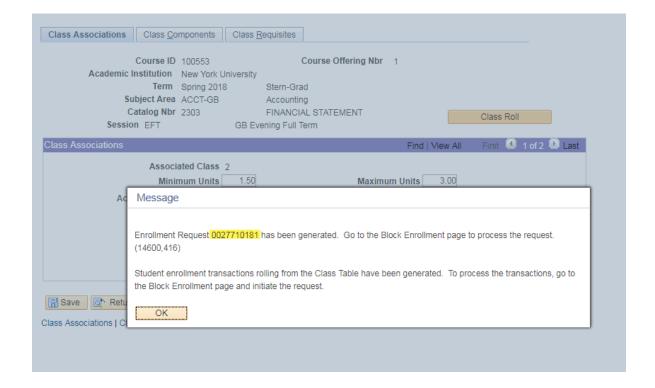
- Click "OK." To update the grading basis, you will need to navigate to the "class components" tab. Update as necessary and click "Save".



Step 5: Click the Class Roll button

Class Associations Class Components	Class Requisites	
Course ID 100553 Academic Institution New York	Course Offering Nbr 1 University	
Term Spring 20	·	
Subject Area ACCT-GE	Accounting	
Catalog Nbr 2303	FINANCIAL STATEMENT Class Roll	
Session EFT	GB Evening Full Term	
Class Associations	Find   View All First 🕚 1 of 2 🕖	Last
Associated Clas	3 2	
Minimum Unit	1.50 <b>Maximum Units</b> 3.00	
Academic Progress Unit	1.50 FA Units 1.50	
Course Cour	t 1.00 Course Contact Hours 43.20	
Billing Facto	r 1.000 *Instructor Edit No Enrollment Choice	•
Tuition Grou	Q	
	Use Blind Grading	
Save Return to Search 1 Pi	evious in List  Next in List  Notify  Requisites	

Step 6: Copy the Enrollment Request ID and click OK



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

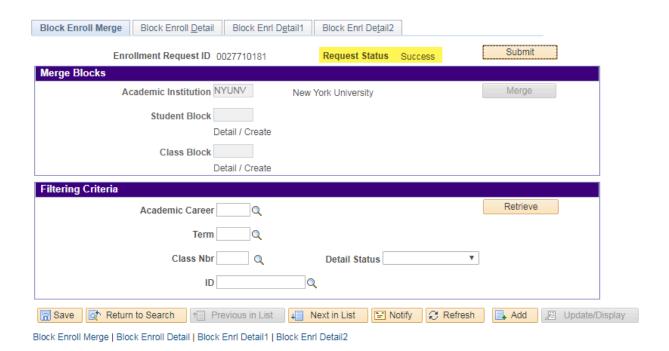
# Step 8: Paste or enter the Enrollment Request ID then click Search

Block Enroll Merge	
Enter any information you have and click Sea	arch. Leave fields blank for a list of all values.
Find an Existing Value Add a New Va	alue
<b>▼</b> Search Criteria	
	7710181
ID begins with ▼	
Academic Career = ▼	▼
Academic Institution begins with ▼	Q
Term begins with ▼	Q
Class Nbr = ▼	
User ID begins with ▼	Q
Campus ID begins with ▼	
National ID begins with ▼	
Last Name begins with ▼	
First Name begins with ▼	
Case Sensitive	
Search Clear Basic Search	Save Search Criteria

Step 9: Click the Submit button

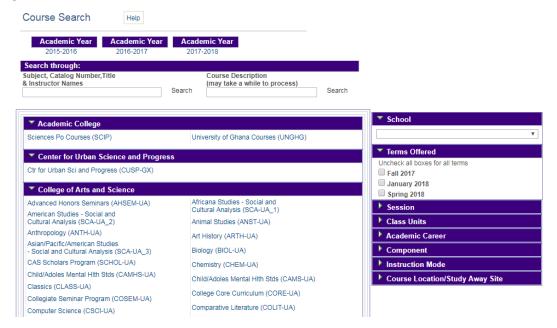
Block Enroll Merge	Block Enroll <u>D</u> etail	Block Enrl Detail1	Block Enrl Detail2			
Enro	ollment Request ID 00	027710181	Request Status	Pending	Submit	
Merge Blocks						
A	cademic Institution N	/UNV Nev	v York University		Merge	
	Student Block					
	De	tail / Create				
	Class Block					
	De	tail / Create				
iltering Criteria						
	Academic Career	Q			Retrieve	
	Term	Q				
	Class Nbr	Q	Detail Status	•		
	ID	l	Q			
Save Return	n to Search Pre	evious in List	Next in List	otify 2 Refresh	Add Dupdat	e/Displa

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



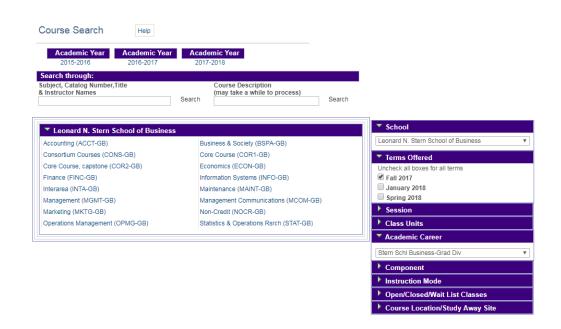
#### **Class Search**

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

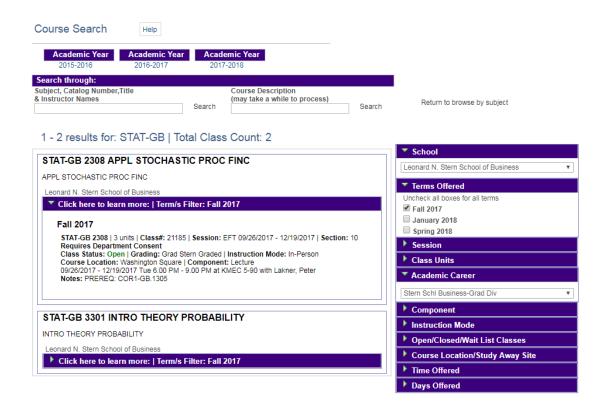


**Step 2**: Select the Academic Year, School, Term, and Academic Career to find Graduate Stern courses.

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



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

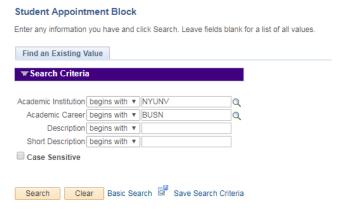


# **Enrollment Appointments**

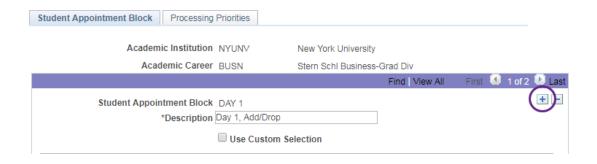
# **Create a New Enrollment Appointment**

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

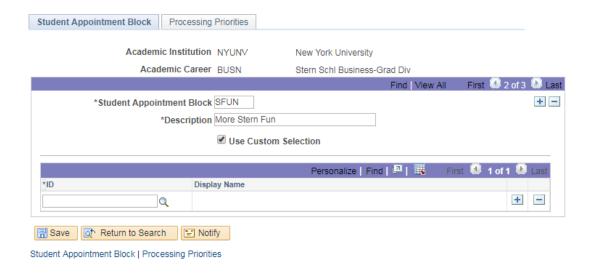
Step 2: Search for the BUSN Academic Career



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



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



**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)



# Step 7: Enter Academic Career and the Student Appointment Block

#### Appointment Block Load

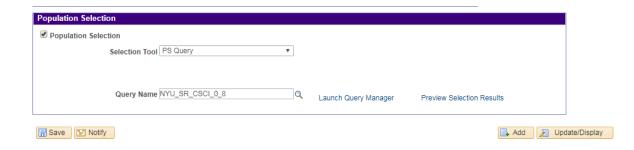


# Step 7: Population Selection

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



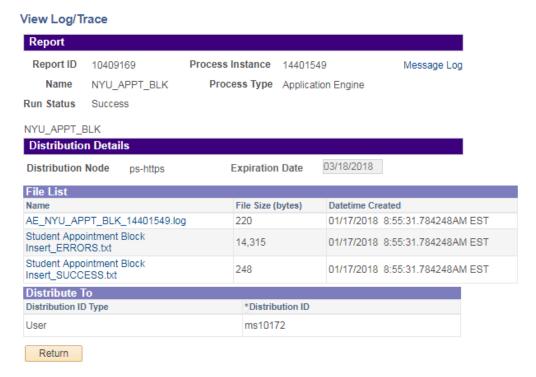
- If you select PS Query, use the magnifying glass to select the appropriate query



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



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



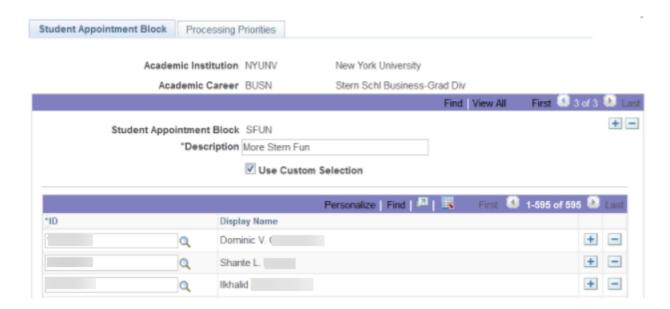
#### **Step 10**: View the success file and the error file

 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: _____, Dominic V. | N-id: ____ - SUCCESS.
Career: BUSN | Student: 10020294 | Name: , Shante L. | N-id: - SUCCESS.
Career: BUSN | Student: 10027245 | Name: ,Ilkhalid | N-id: - SUCCESS.
Career: BUSN | Student: 10033718 | Name:
                             ,Christina T. | N-id: - SUCCESS.
Career: BUSN | Student: 10046121 | Name: 3, Alan A. | N-id: - SUCCESS.
Career: BUSN | Student: 10052287 | Name: Young | N-id: - SUCCESS.
```

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

#### \*Continue to Appointment Table



# **Find an Existing Enrollment Appointment**

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

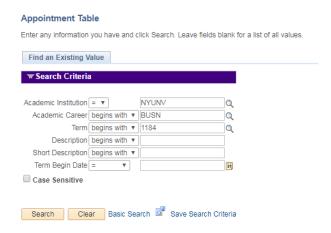
**Step 2**: Check the Use Custom Selection box and upload a file or use ps query

 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**

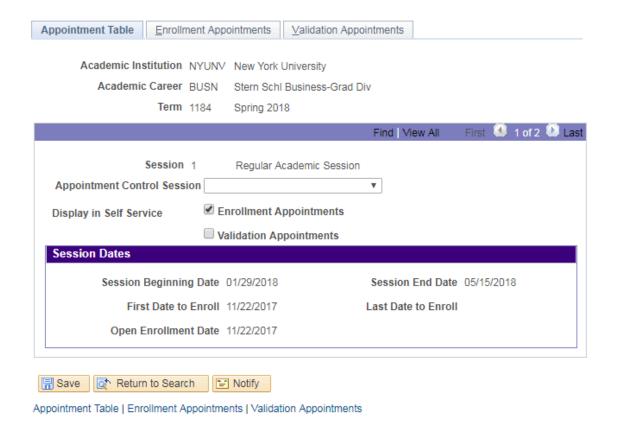
**Step 1**: Navigate to: Records and Enrollment> Term Processing> Appointments> Appointment Table

#### Step 2: Fill in the appropriate fields and click Search

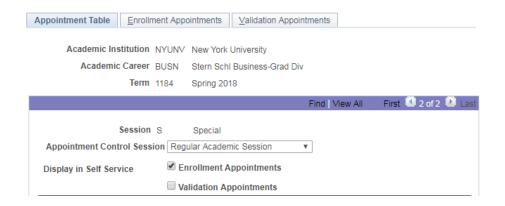


**Step 3**: Determine which session will be the appointment control session. For all other sessions, set the appointment control session.

- 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



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

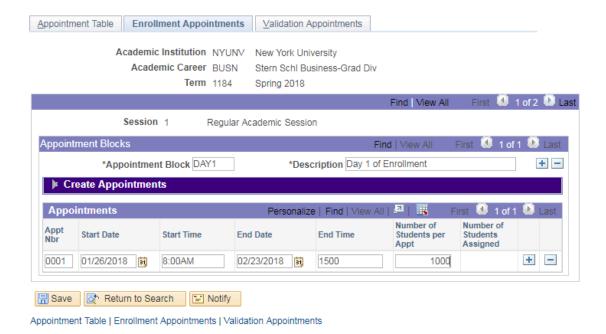


#### Step 4: Go to the Enrollment Appointments tab

- 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.



# **Assign Appointments to Students**

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

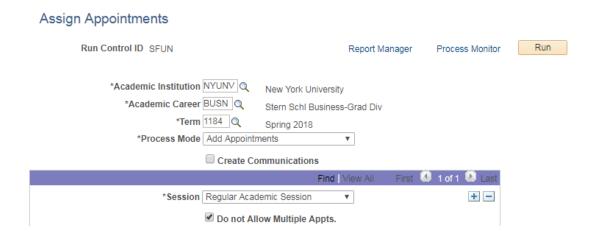
# Step 2: Enter an existing Run Control or Add a New Value



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

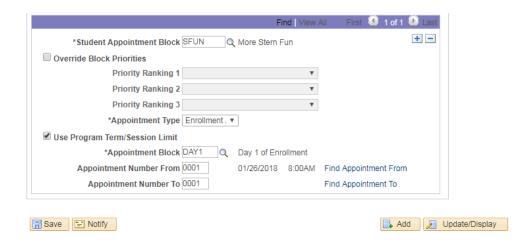


# Step 5: Enter the Student Appointment Block

- Check the 'Use Program Term/Session Limit

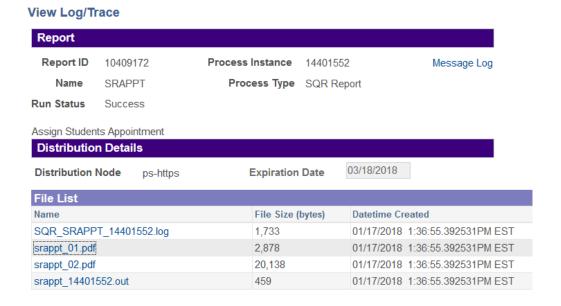
# **Step 6**: Enter the Appointment Block, Appointment Number From, and Appointment Number To.

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



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.



# 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

New York University

Academic Career: Stern Schl Business-Grad Div

Spring 2018 Regular Academic Session Appointment Assignment Mode: Add Appointments Session: 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 ASSIGN APPOINTMENTS

Report ID: SRAPPT 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 Acad
Student Block: SFUN More St Appointment Assignment Mode: Add Appointments Do not Allow Multiple Appointments for a Student in This Session Regular Academic Session

SFUN More Stern Fun Custom Student Selection Appointment Type: Enrollment Appointment

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

