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Rules and Filters – CourseLeaf Section Scheduler (CLSS)

Types of Rules

Each rule has an associated symbol, indicating what type of rule it is. The description following the symbol will tell you what triggered the rule and, in some cases, how to resolve the rule.

Warning

The yellow symbol with an exclamation point indicates a warning. Warnings allow you to save but also serve as a reminder. When a warning is triggered, it's important to review the warning to ensure you haven't missed something. For example:

- If you forget to put "pm" on a meeting pattern, you may see the following warning: "Are you sure you want this to start before 8 a.m. or after 8 p.m.?"
- The most important warning you may get is the **contact minute warning**. If you see this appear, click on the hyperlink to view what sections are not meeting their contact minutes. Linked sections may not apply to the warning, but you're advised to check that linked sections are correctly meeting the contact minutes.

Workflow

The blue symbol with three white figures indicates a workflow. This means a change requires review. When a workflow is triggered in refine mode, you'll have the option to "submit to workflow" instead of saving. Any changes are considered pending until the section has been fully approved through the workflow.

To view what step in workflow the section is currently in, open the section and click the "workflow status" button at the bottom of the page.

Error

The red symbol with one white horizontal line indicates an error. An error will prevent a section from saving and the save button will not appear. Errors need to be corrected. The description of the error will state what needs to be corrected and, in some cases, how to correct it. For example:

- If you enter a number other than 0 or 999 in the waitlist field, you'll receive an error stating: "Waitlist must be either 0 or 999."

Workflow Rules

There are two types of workflows:

1. Changes that require only academic scheduling approval (AS only workflow)
2. Changes that require chair, dean and academic scheduling approval (Chair+Dean+AS workflow)

Design Mode

In design mode, all changes are submitted together when you validate and submit your schedule. Therefore, any change that triggers a workflow icon will appear when academic scheduling reviews your entire schedule. The only workflow in place during design mode is AS only approval.

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Refine Mode

In refine mode, changes that trigger a workflow are based on the phase. Below is a breakdown of each phase, what changes will trigger a workflow and what kind of workflow they require.

Review

- Changes to centrally scheduled rooms: AS only workflow
- Sections with variable credits that include a decimal: AS only workflow
- Enrollment cap is greater than room cap: AS only workflow
- Combined cap is greater than room cap: AS only workflow

Publish

Same workflows as **review** phase in addition to:

- New sections: Chair+Dean+AS workflow
- Changes to status: Chair+Dean+AS workflow
- Changes to session: Chair+Dean+AS workflow
- Changes to campus/location: Chair+Dean+AS workflow
- Changes to instruction mode: Chair+Dean+AS workflow
- Changes to meeting pattern: Chair+Dean+AS workflow

Registration

Same workflows as **publish** phase with the following additions and clarifications:

- Changes to session without enrollment: Chair+Dean+AS workflow. (If there's enrollment, you'll receive an error and need to cancel and recreate.)
- Changes to campus/location without enrollment: Chair+Dean+AS workflow. (If there's enrollment, you'll receive an error and need to cancel and recreate.)
- Changes to instruction mode without enrollment: Chair+Dean+AS workflow. (If there's enrollment, you'll receive an error and need to cancel and recreate.)
- Changes to meeting pattern without enrollment: Chair+Dean+AS workflow. (If there's enrollment, you'll receive an error and need to cancel and recreate. If the time is decreasing, email AS to assist with the change.)
- Changes to Units on sections with enrollment: Chair+Dean+AS workflow
- Changes to section number on sections with enrollment: Chair+Dean+AS workflow
- Sections with BVS session: AS only workflow
- Combining sections with enrollment: AS only workflow
- Any section with the status of "Stop Further Enrollment": Chair+Dean+AS workflow

Freshman Preregistration

Same workflows as **registration** phase in addition to:

- Changes to maximum cap for undergraduate sections: AS only workflow
- Changes to combined maximum cap for undergraduate sections: AS only workflow

Post Registration

Same workflows as **registration** phase

Useful Filters

You can filter for almost any field within CLSS. Using the “codes” tab on the filter tool will show you what the proper code is for each field. Important symbols and additional information on filters can be found in the CLSS Instruction Guide (page 32).

Filtering within your scheduling unit

When you click into your scheduling unit, you’ll notice the filter tool is filtering for your specific unit under the “scheduling unit” box. If you’d like to filter within all classes, you’ll want set that field blank. If you’d like to filter only within your classes, you’ll want that field set to your scheduling unit.

1. Click the “Section” tab in the filter tool.
2. In the “Scheduling Unit” box, use the scheduling unit code. (This is the code that appears next to the scheduling unit name on the scheduling unit page. I.e., Accounting is b-acct.)

Filtering for a specific room

1. Click the “Rooms” tab in the filter tool.
2. In the “Room ID” box, enter the room code. (Room code will always begin with “b.” I.e., The room code for ATLAS 100 is “batls100.”)
3. Click “Apply.”

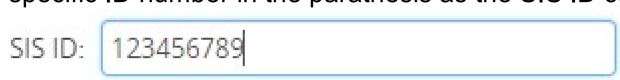
Filter for online active sections

1. Click on “Section tab” in the filter tool.
2. In the “status code” box, enter A for active sections. (To view all active and canceled sections, leave this field blank)
3. In the “Inst. Mode Code” box, enter in OL for online sections.
4. Click “Apply.”

Filter for instructors

While you can use the “view by” tool at the top of CLSS screen to view your scheduling unit by instructor, use the filter as described below if you want to filter for a specific instructor to see all classes (including those outside your own scheduling unit).

1. Make sure the “scheduling unit” field is cleared in filter tool.
2. Click the “Instructors” tab.
3. In the SIS ID field, use the ID number next to an instructor’s name in CLSS as the code.
    a. Instructors will appear in the following format: Doe, Jane (123456789).
    b. Use their specific ID number in the parathesis as the SIS ID code.



4. Click “Apply.”

Filter for combined sections

The easiest way to filter for sections that are combined is to use the combined enrollment maximum field. All combined sections have this field; you can filter for any section with a combined maximum greater than 0.

1. Click the “Section tab” in the filter tool.
2. In the Combined Maximum box enter “>0” (this translates to any combined max. cap greater than 0).
3. Click “Apply.”

You can also filter for the combined (“COMB”) attribute. This will pull up any section that has the COMB attribute, which should only be on combined sections.

1. Click the “Sections” tab in the filter tool.
2. In “Attributes Code” box, enter “COMB!!!NON-SPONSR” for non-sponsor attributes and “COMB!!!SPONSOR” for sponsor attributes. To filter for all, use the code “COMB*.”