

COURSE LEAF SCHEDULING SYSTEM (CLSS)

Course Leaf Section Scheduler (CLSS) is Northwestern's primary academic scheduling tool where departments construct class offerings, edit classes, and control some aspects of enrollment.

More detailed information about CLSS with a complete manual, instructional videos, upcoming training sessions, and scheduling deadlines can be found at:
www.registrar.northwestern.edu/faculty-staff/course-leaf-section-scheduler-clss

What CLSS *can* do:

- Create classes
- Update course topic titles
- List course attributes
- Set a class to be viewable in CAESAR
- Create and adjust class meeting patterns
- Schedule classes in department controlled classrooms
- Request General Purpose classrooms managed by the Registrar for classes
- Request features or characteristics for general purpose classroom (chalk boards, moveable desks, projectors, etc)
- Assign Instructors to classes
- Assign Teaching Assistants to classes
- Create and update class enrollment capacities
- Create and update class waitlists
- Set a class to require enrollment consent

What CLSS *cannot* do:

- Create permission numbers
[This can be done in CAESAR]
- Assign requisite groups for student enrollment
[This can be done in CAESAR]
- Create reserve capacities in classes for student enrollment
[This can be done in CAESAR]
- Assign course prerequisites
[This can be done in CAESAR]
- Update class descriptions
[This can be done in CAESAR]
- Search for available general purpose room
[This can be done in RES]
- View class rosters or waitlists
[This can be done in CAESAR]

The ability to update a class in CLSS is dependant on which phase the scheduling unit is in, if students are enrolled in a class, or if the class is combined.

CLSS Scheduling Phases

The ability to update a class in CLSS is dependant on which phase the scheduling unit is in.

If you are requesting edits outside of these phases, if a class is combined with another offering or if students are enrolled, please email registration@northwestern.edu

Design Plan Phase

- | | | |
|------------------|------------------------|-------------------------|
| • Topic/Title | • Consent | • Maximum Enrollment |
| • Section Number | • Grade Mode | • Projected Enrollment |
| • Schedule Print | • Section Attributes | • Waitlist Capacity |
| • Section Type | • Instructor | • Request Room Capacity |
| • Link to | • Room Assignment | • Comments |
| • Session | • Room Characteristics | |
| • Status | • Meeting Pattern | |

Refine Plan Phase

- | | | |
|------------------|------------------------|--------------------------|
| • Topic/Title | • Consent | • Maximum Enrollment* |
| • Schedule Print | • Section Attributes | • Projected Enrollment |
| • Section Type | • Instructor | • Waitlist Capacity* |
| • Link to | • Room Assignment | • Request Room Capacity* |
| • Session | • Room Characteristics | • Comments |
| • Status | • Meeting Pattern* | |

Room Assignment Phase

Classes are being scheduled to general purpose classrooms.
No changes can be made in CLSS during this phase.

Present Phase

- | | | |
|------------------|----------------------------|--------------------------|
| • Topic/Title | • Consent | • Projected Enrollment* |
| • Schedule Print | • Section Attributes | • Waitlist Capacity* |
| • Section Type | • Instructor | • Request Room Capacity* |
| • Link to | • Details Regarding Rooms* | • Comments |
| • Session* | • Meeting Pattern* | |
| • Status | • Maximum Enrollment* | |

Past Phase

No changes can be made in CLSS during this phase.

Scheduling a Class in CLSS

1. Selecting a Term

After logging in, you can choose to work on your schedule by choosing a term under the Current or Future headings or review a past schedule by clicking on a term under the Historical heading. No edits can be made to a historical term in CLSS.

CourseLeaf/CLSS – Instances Nicholas Tonozzi Log Out

Please check upcoming CLSS trainings in FASIS. More info at: <http://planitpurple.northwestern.edu/calendar/regsched> –The Reg/Sched Team

Historical		Current	Future
2016 Academic Year	2015 Academic Year	2017 Academic Year	2017 Academic Year
2015 Fall	2014 Fall	2016 Fall	2017 Spring
2016 Winter	2015 Winter	2017 Winter	2017 Summer
2016 Spring	2015 Spring		
2016 Summer	2015 Summer		
2014 Academic Year	2013 Academic Year		
2013 Fall	2012 Summer		
2014 Winter	2012 Fall		
2014 Spring	2013 Winter		
2014 Summer	2013 Spring		
	2013 Summer		
2012 Academic Year	2011 Academic Year		
2011 Fall	2010 Fall		
2012 Winter	2011 Winter		
2012 Spring	2011 Spring		
	2011 Summer		

2. Viewing a Scheduling Unit's Term Offerings

From the list, double-click your scheduling unit/department to view your offerings. The courses currently in your scheduling unit's offerings for the quarter will be displayed. By default, you'll be viewing the schedule by Course. You can select "View By" from the top panel to view your schedule by instructor or day and time as well.

- To expand all courses and reveal individual sections, click the outer facing arrows next to the word "Offerings" at the top left of your screen. To collapse, click the inward facing arrows.
- To expand just one course, double click on the course title.
- To add a course that is not currently visible, check the "show courses with no sections" box in the upper right-hand corner of the page. To add a newly-approved course, you will need to submit a new course form to the Registrar's Office.

23 Courses, 109 Sections ↑ ↓
Present Phase Refine Mode View By Validate Bridge Tools Visualize Filter Framer Export ☐ Show courses with no sections

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➤ ANTHRO 101-6 – First-Year Seminar

ANTHRO 214-0 – Archaeology: Unearthing History

ANTHRO 270-0 – Anthropology of Social Media

ANTHRO 306-0 – Evolution of Life Histories

ANTHRO 315-0 – Medical Anthropology

The first time you view your offerings for a term, you will be presented with the previous like-term's offerings. You can then add or delete sections/courses as needed.

3. Viewing a Scheduling Unit's Term Offerings

- To edit an existing offering, double click on it. Offerings can only be edited one at a time.
- To add a new section, click on the green plus icon to the right of the class title.

ANTHRO 101-6 – First-Year Seminar					+
21	SEM	Waxenbaum Dennison, Erin (EBW...	MW 11am-12:20pm	Making of the Fittest: Issues in Ev...	
22	SEM	Logan, Amanda (ALL998)	MW 11am-12:20pm	Food & Culture	
23	SEM	Miller, Aaron (AAM866)	MW 5pm-6:20pm	Going Paleo	
➤ ANTHRO 214-0 – Archaeology: Unearthing History					+
1	LEC	Johnson, Matthew (MHj403)	TTh 11am-12:20pm		
61	DIS	Staff	M 9am-9:50am		
62	DIS	Staff	M 10am-10:50am		

4. Creating And Updating Classes

Rules for Scheduling New Sections	Rules for Editing Existing Sections
<ul style="list-style-type: none"> • All new sections must be reviewed and approved by the RO • For each course, the first associated component (lab/disc usually) type scheduled determines the type for the rest of its siblings. • Requested Room Cap and room characteristics will be used when finding a new class a room. 	<ul style="list-style-type: none"> • Requested Room Cap and Room Characteristics cannot be edited • Where enrollment exists – user cannot cancel sections; adjust session code, class section number, meeting patterns • General purpose room assignment lost when changing class time • Section Type adjustments are not allowed • Enrollment Cap < Assigned Room Cap

Notes about Class Scheduling Rules, University Policy, and Schedule Approval

- Rules have been created by the Registrar's Office to also assist with data transference as well as to remind the user of any and all scheduling policies.
- Some rules will result in warnings that will recommend a different course of action, but will not stop the user from saving their edits and proceeding forward with their changes. Others will require approval, such as a change to a class meeting pattern after the registration period has begun, and will proceed through workflow to the appropriate approver.
- Changes will remain tentative when sent to the authorized individual, and will only be confirmed and saved if that individual approves the change.
- If the approver does not accept the change, they will roll back the adjustment to the initial submitter with a comment or reason as to why that change was not accepted.
- A final group of rules will result in an error that will prevent the user from saving any changes for a class offering until that rule is met.
- All adjustments to schedules in CLSS during Design Mode and Plan Phase will NOT be viewable to the university public at large. Only departmental schedulers and central administration personnel (Registrar's Office, Deans, Faculty Chairs) that are directly responsible for setting their department's academic schedules will be able to see this information at this point in the academic cycle. Professors will not be given access to CLSS.

Edit Section – BIOL_SCI 218-0-20: Biochemistry (SIS Class Nbr: 23935)

Section Information

1 Title/Topic: Biochemistry (Default Value) 7 Session: Regular Academic Session

2 Section #: 20 8 Campus: Evanston Campus

3 Credit Hrs: 1 9 Status: Active

4 Schedule Print: Yes 10 Consent: No Special Consent Required

5 Section Type: Lecture 11 Grade Mode: ABC Grading

6 Link To: Not linked to other sections

12 Section Attributes **13 Course Attributes**

WCAS Distribution Requirement: Natural Sciences Distro Area WCAS Distribution Requirement: Natural Sciences Distro Area

14 Instructor **15 Room** **17 Schedule**

Meade, Thomas (TJM604) General Purpose Classroom MWF 10am-10:50am

16 Characteristics

Campus: North
NUIT WiFi
Room Request
Seating: Seminar Style

18 Enrollment **19 Comments**

0 current

Maximum	Projected	Wait Cap	Request Rm Cap
220		0	220

20 21

Close Save Section

A Key to the CLSS Create/Edit Class Window

- Title/Topic-** All the existing topics will display in the drop down menu. If there is a topic that is not listed, you will need to notify the RO to add the topic in the comments section.
- Section-** The section number of the course. This has to be an alphanumeric symbol meaning only numbers and letters. This field is required.
- Credit Hrs-** The number of units for the class. CLSS will only display the minimum amount of units for variable unit courses. This field is grayed out and not editable.
- Schedule Print-** This field allows you to select which courses will be viewable to the campus community. By selecting “No,” classes will not be visible in Caesar.
- Section Type-** The default section from the course catalog is populated here. If you would like to change the section type, you will need to notify the RO know in the comments field.
- Link To-** A primary section will not be linked to any courses. When adding a secondary component, the section type will be discussion or lab and will link to a section number. These options will be available only for a secondary component.
- Session-** This field is defaulted to Regular Academic Session, the ten-week session. By selecting the drop down, there will be the five week options as well as a nine week option. The NINE WEEK-SECOND option is for AMP/GSW courses ONLY.
- Campus-** The defaulted campus in the course catalog.
- Status-** The status of the class, the only ones you will use are Active and Cancelled. Do not select Stop Further Enrollment or Tentative Section.
- Consent-** Classes can either be placed on “No Special Consent Required,” or “Department Consent” and “Instructor Consent.” The latter two require students to have a permission number to enroll in the course.
- Grade Mode-** This field is editable in design mode. Please note that all grading basis’ that exist

in SES will be listed in the drop down menu, however you will only be using a handful of these. Most common grading basis' include ABC Grading, Student Option, ABC/K (for continuation courses) and ABC/Pass/No Pass (for Grad courses only).

- 12. Section Attributes-** This field contains attributes that are listed on the specific course section only. If you click on the blue pencil on the right of the field, you will see all the section attribute options that are available and can be added to the section
- 13. Course Attributes-** This field contains attributes that are listed on the course in the course catalog. This field is not editable.
- 14. Instructor-** The drop down menu lists instructors that are associated with your department. If you do not see an instructor listed here, you will need to notify the RO to either add the instructor to SES or associate them with your department.
- 15. Room-** Any departmentally controlled rooms you own will be listed in the drop down menu. There will also be options for a General Purpose Room if the class needs a GP classroom, Meets in a Non-General Purpose Rm if the class will meet in a room controlled by another department, and No Room Needed-Does Not Meet which must be added to all independent studies and/or courses with no meeting pattern.
- 16. Characteristics-** By selecting the blue pencil next to this field, you will be able to select up to FOUR room characteristics for that particular section.
- 17. Schedule-** The meeting pattern for the class is listed here. To edit, you will click on the hyperlink and this will open the scheduler. Please refer to the scheduler handout for more information about selecting meeting patterns
- 18. Enrollment-**
 - Maximum-** This field is where you will enter the maximum enrollment for the class.
 - Projected-** Internal value (Not submitted to SES), this field is for planning purposes only. It is an expectation of how many students will enroll and it is not required.
 - Wait Cap-** This field is where you will enter the maximum number of seats for a waitlist. If you leave the field at zero, no waitlist will be automatically triggered when the class reaches its maximum enrollment.
 - Request Rm Cap-** This field is where you enter the room capacity for the class. Please note the maximum enrollment capacity cannot be greater than the room capacity
- 19. Comments-** For any changes that are not editable on this page, you will need to request them to the RO with this comments field. Please refer to the Comments tip sheet on information that will need to be requested through this field.
- 20. Close-** To close the section without saving any edits, click this option.
- 21. Save Section-** To save information you have edited and close the section, click this option.

Requestings Additions and Changes in the Comment Feild

New Topic Request – Enter “New Topic Request: ...”

Combined Section Request – Enter “Combined with...”

Campus Changes – Enter “Campus Change: ...”

Drop Consent – Enter “Drop Consent Needed.”

Grading Basis Change (Refine Mode Only) – Enter “Grade Mode Change: ...”

Multiple Meeting Patterns – Enter “Multiple Meeting Pattern: ...”

Student Specific Permissions – Enter “Set to Student Specific Permissions.”

Class Notes – Enter “Class Notes: ...”

Instructor Hidden from Student view of Schedule – Enter “No Instructor Print”

Session Change (Refine Mode Only) – Enter “Session Change:...”

5. Adding Instructors & TAs

- When you create a new section, the instructor will be listed as “Staff
- Select the blue pencil next to the Instructor heading to add/edit an instructor.
- Choose one of your department’s instructors from the drop down or type the instructor’s name or NetID for quick access. If you don’t see your instructor, the Reg/Sched team can add it to CLSS.
- To choose an instructor that teaches in a different department, select Other in the drop down to search.
- Once you have selected your instructor, add their Role (Primary Instructor/Secondary Instructor/TA) from the second drop down menu. A section can only have one Primary Instructor.
- To add additional instructors/TAs, click the green plus icon on the right.
- To switch out an assigned instructor OR change the role of an existing instructor, add a new row with the green plus icon, select the instructor/role, and delete the original instructor row using the trash can icon. If you change the original instructor row instead of deleting it, your class will not save correctly.
- Click Accept to save your instructors.

Instructors	
Instructor	Role
Erkkila, Betsy (BJE026)	Primary Instructor
Dubos, Bradley (BMD067)	Teaching Assistant
Mason, Sarah (SML712)	Teaching Assistant
Weihl, Harrington (HFW310)	Teaching Assistant

Search: Weihl, Harrington (HFW310)

Cancel Accept

Notes About TAs

- TA's must be added to the main lecture section of a course for CTEC evaluation and reporting purposes. They can also be added to a particular lab or discussion.
- TA's will be populated to Canvas.
- It is important to note that listing TAs in Canvas alone does not connect them to the class for CTEC purposes.

6. Choosing a Room and Room Attributes

- In the room drop down, you will see multiple options:

The screenshot shows a dropdown menu titled "Room". The menu is open, displaying a list of room options. A red bracket labeled "1" groups the first six items: "ANTHRO Sem Rm 104 - 1810 Hinmn", "ANTHRO Lab 127 - 555 Clark", "ANTHRO Lab A53 - 1810 Hinmn", "ANTHRO Lab A56 - 1810 Hinmn", "ANTHRO Lab A58 - 1810 Hinmn" (which is highlighted in blue), and "ANTHRO Lab A59 - 1810 Hinmn". A red number "2" is next to "General Purpose Classroom". A red number "3" is next to "Meets in Non-General PurposeRm". A red number "4" is next to "No Room Needed".

- 1. Departmentally Controlled Rooms** - Any rooms or locations your department is able to directly schedule will appear in the drop down list. This includes labs and other special purpose room.
- 2. General Purpose Classroom** - Select this option if you need the Registrar's Office to assign a room for this section.
- 3. Meets in Non-General Purpose Rm** - If your section is meeting a room that isn't in the drop down but don't want the Registrar's Office to assign a general purpose room. You might use this option for combined sections where the other other department has room they can schedule the classes in or if you get special permission to use a different space on campus. You can list what room should be assigned to the section in the comments and the RegSched team will update the section in Caesar.
- 4. No Room Needed** - This should only be used for sections where the meeting pattern is "Does Not Meet" (i.e. Independent Studies or Internships). If a section has a meeting pattern, it must have either a room, General Purpose Classroom, or Meets in Non-General PurposeRm selected.

- When you select General Purpose Classroom, you are given the options select characteristics the room should have. In order for our scheduling software to assign a space, it must locate a room that meets all the required characteristics.
- These Room Attributes/Characteristics should represent pedagogical needs required to teach the section, not an instructor's wishlist. The more characteristics added to a section, the smaller the pool of classrooms that might meet ALL those requirements.
- Additional things to note:
 - You are limited to four characteristics.
 - Each characteristic added becomes an "AND statement". (i.e. This sections needs a Laptop Hookup AND to be on North Campus)
 - The scheduling optimizer already weighs building preference based on the subject (the computer knows Math sections should be scheduled to Lunt first, Tech second, etc.). Adding additional campus requirements only limits the choices to where a class can be placed.
- If you use "Room Request" as a characteristic, it must be reflected on the special accommodation Room Request Form. For more information, please visit:
<http://www.registrar.northwestern.edu/room-request/academic-room-request.html>

7. Choosing a Room and Room Attributes

- Select the blue calendar icon on the Edit/Create Section page to navigate to the section scheduling screen:




- Selecting Days from the top allows you to select what days are visible in this screen (if you needed to schedule on a Saturday for example). It does NOT reflect scheduling on specific days.
- To schedule, click Patterns to select the type of Standard Meeting pattern you'd like to offer. The example to the right shows a standard pattern meeting twice a week for 3 hour.
- For non-standard meeting patterns, you can use "User Defined" in the patterns. The recommended format to enter these dates are DAYS (SPACE) TIME_START-TIME_END. Military/24 hour time is recommended as well.
- A red bar on a time period means the instructor is already teaching another class at that time.
- Roll over and select which time you'd like to offer a section.
- If you have a departmentally controlled room and want to know when it is available for scheduling your section, select Rooms in the lower left hand corner. The room grid will show give you departmentally controlled rooms on the left hand side and meeting patterns across the top.

8. Add Comments

- The Comments field allows you to request changes from the Reg/Sched team that you cannot make in CLSS directly.
- Please reference page 12 for more information about how to enter requests and information in the comment field.

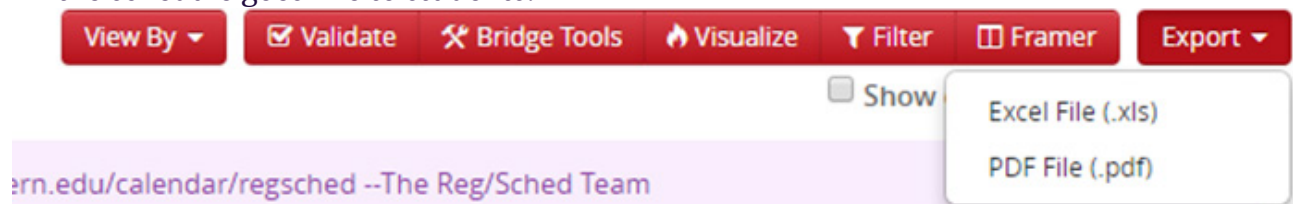
9. Save Section

- When you save your section, CLSS will run it against a series of rules to make sure the section conforms to university regulations. CLSS will give you feedback on your save attempt. Potential outcomes are listed below:

Validation Symbol	Meaning
 Warning	Your section can still be saved, but there could be potential issues. Please review the additional information CLSS provides to understand what those issues could be.
 Error	Your section could not be saved. CLSS will let you know what needs to be changed in order to save the section successfully.
 Workflow	The section data you have provided can be saved, but will require approval. Make sure you hit the Start Workflow button to submit the section.

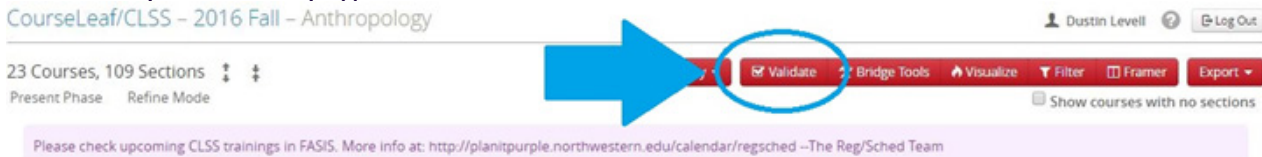
10. Reviewing and Generating Reports of Your Schedule

- In the upper right hand corner of your department's page, select Export to generate an Excel Spreadsheet or PDF of your schedule:
- The spreadsheet provides the greatest detail of all the information in CLSS. The PDF provides a higher level overview of your schedule. It's helpful to use these documents to double check that all the information in CLSS is correct and what you want viewable before the schedule goes live to students.



11. Submit Your Scheduled (Validate)

- Schedules must be validated and submitted via CLSS by the due date.
- When you're ready to submit, click Validate in the upper right hand corner of your department's page.



- Note: Even if your schedule isn't 100% complete, you are still required to submit BY THE DUE DATE. You can continue to make additions and changes up until Room Assignment Phase and then again after room assignment phase, but on a more limited scale.