

Generating and Distributing Class Permission Numbers

OBJECTIVE: Provide instructions for effectively using class permission numbers.

CONTENTS:

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NEED ADDITIONAL INFORMATION?

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/it/cms/contact.html> to locate the **Student Records Functional Lead.**

Lesson 1: Generating Permission Numbers By Class

Navigation: Records and Enrollment > Term Processing > Class Permissions > Class Permissions > Permission to Add (tab)

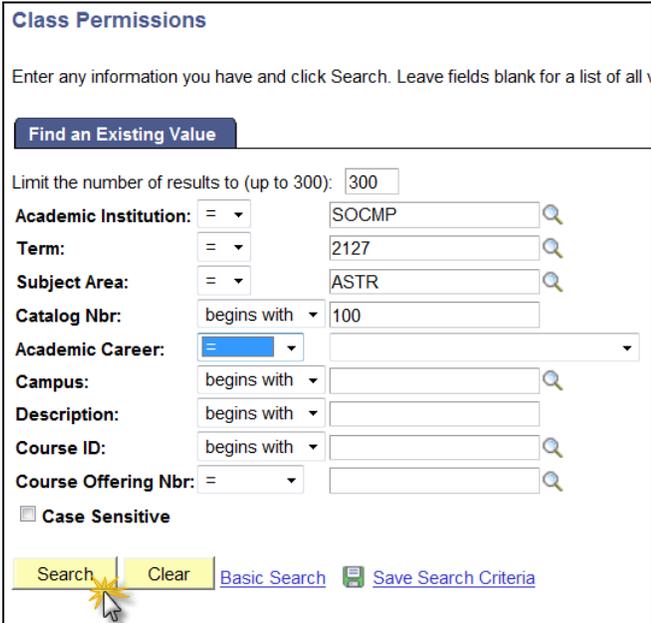
Introduction:

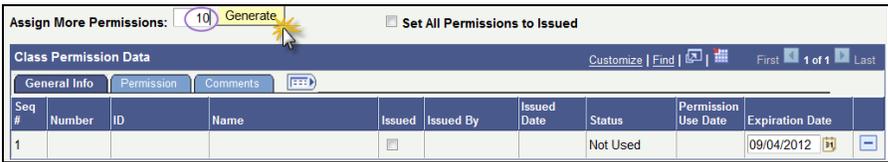
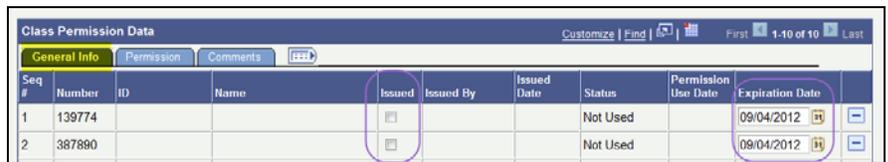
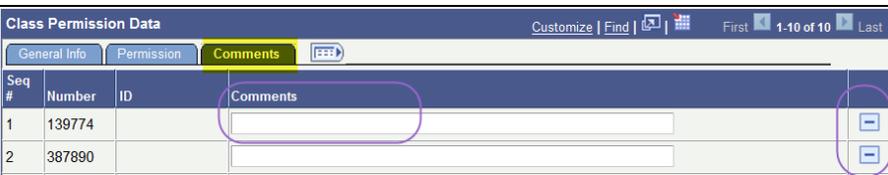
Class permission numbers are an effective way to permit students into a class which has established pre-requisites, requires department consent, or has reached the enrollment capacity. Users with security will be provided access to generate permission numbers with a designated expiration date. Permission numbers can be valid for any of the following:

- Closed Class – Allows students to enroll in a class that is full including one where all available seats are subject to reserve capacity requirements that they might not meet. **Use of this override is very limited and should only be made in consultation with the School Scheduler.**
- Requisites Not Met – Allows students to enroll in a class for which they do not meet the prerequisites.
- Consent Required – Allows students to enroll in a class that requires instructor or department consent to add.
- Career Restriction – Allows students to enroll in a class that is outside their career, i.e. a PBAC enrolling in a UGRD course.
- Permission Time Period – Allows students to enroll in the class during the enrollment periods. This option should always be checked.

Note: At this time, the Assign More Permission Numbers generate option will only display for the first section if the View All feature is selected. CMS recommends using View 1 and clicking the arrow button so select the appropriate section to assign permission numbers.

Additionally, the order of sections is based on the class number rather than the section number. Please review the section number *before* creating permission numbers to make sure you are adding to the desired class.

Step	Directions	Screenshot
1	Navigate to Class Permissions.	Records and Enrollment > Term Processing > Class Permissions > Class Permissions > Permission to Add
2	Search for the desired term and class.	
3	Review the Course and Class Section data to confirm the correct class has been selected. This is an example: 	
4	Set the defaults. The Expiration Date will default as the Last Day to Add/Drop but can be changed. Select the Permission Valid For options as appropriate.	 <p data-bbox="625 1633 1523 1703">Note: Definitions for each permission type may be found at the introduction of this lesson.</p>

<p>5</p> <p>Enter the number of desired Permission Numbers. Click Generate.</p>	
<p>6</p> <p>General Info Tab – permission numbers will display. Select Issued to track the numbers given to students. The Expiration Date can be changed as necessary.</p>	
<p>7</p> <p>Permission Tab – review and as necessary change the permission number options. Permission numbers can also be deleted if they have not been used or issued.</p>	
<p>8</p> <p>Comments Tab – Add comments as desired. Numbers can also be deleted on this tab.</p>	
<p>9</p> <p>Click Save once all details have been confirmed and/or changed.</p>	

Note: “Set All Permissions to Issued” should only be selected if the user will be distributing the numbers immediately. The Issued By and Issued Date fields will populate with the user details.

Note: Do not uncheck the Permission Time Period option.

Lesson 2: Generating Permission Numbers By Subject

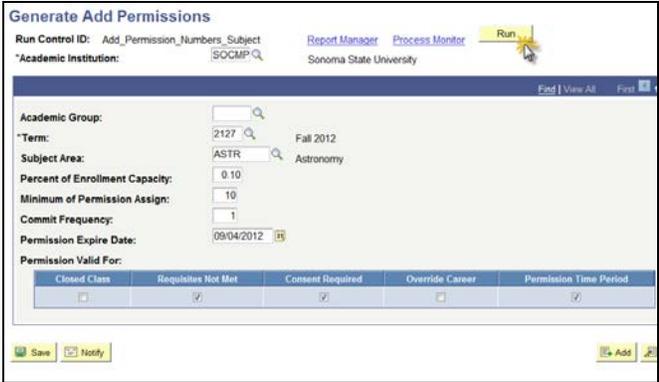
Navigation: Records and Enrollment > Term Processing > Class Permissions > Generate Add Permissions

Introduction:

Users are able to generate permission numbers for an entire subject with this functionality. Settings on the run control can be selected to create the amount of permission numbers desired. Descriptions for each of the permission options may be found in the introduction of Lesson 1.

Because the permission numbers are created for an entire subject, it is important to carefully review all settings on the run control before processing. If mistakes are made, manual clean-up per class will be the only solution.

Note: Generating permission numbers by subject can only be run once per term per subject. Additional permission numbers can be generated by class by following Lesson 1.

Step	Directions	Screenshot
1	Navigate to Class Permissions.	Records and Enrollment > Term Processing > Class Permissions > Generate Add Permissions
2	Click on 'Add a New Value'. Enter the title of your 'Run Control' with no spaces . Click Add. This new Run Control will be saved to your profile and can be located by clicking Search.	
3	Enter the Run Control settings. "Percent of Enrollment Capacity" will calculate the amount of numbers to create based on capacity. If the "Minimum of Permission Assign" is set, at least that many numbers will be created. Click Run.	

<p>4</p>	<p>Set the Process details as indicated in the screen shot.</p>	
<p>5</p>	<p>Click the Process Monitor to view the Status of the request.</p>	
<p>6</p>	<p>Refresh the Process Monitor until the Run Status/Distribution Status have changed to Success/Posted. Click Details.</p>	
<p>7</p>	<p>Click View Log/Trace. Then, click the PDF file.</p>	
<p>8</p>	<p>Here is a sample report showing the permission numbers created and for which courses.</p>	<p>Note: The Nbr of Prmsn Assigned is based on the number created based on the percentage set on the run control.</p>

Lesson 3: Distributing Permission Numbers

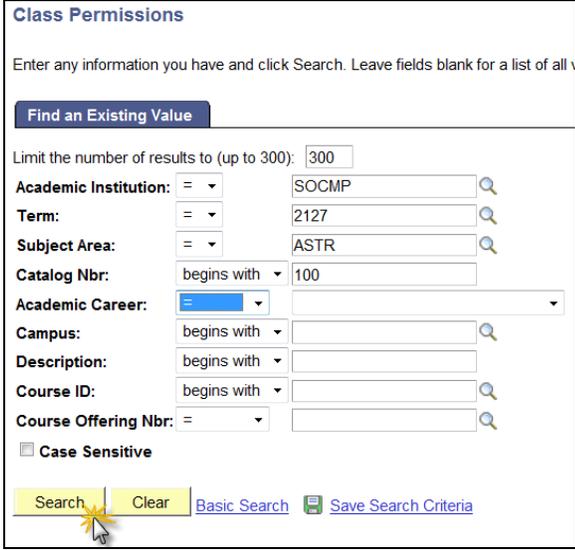
Navigation: Records and Enrollment > Term Processing > Class Permissions > Class Permissions

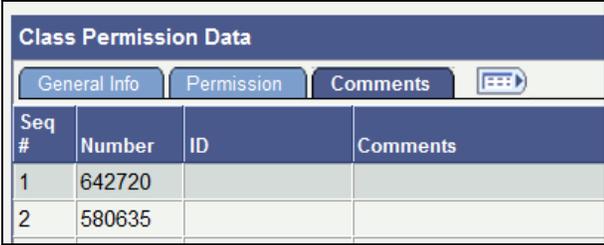
Introduction:

Once permission numbers have been generated, users with access can issue them to students directly or to faculty who wish to manage which students move into their class. Before issuing the number, the permission options should be reviewed to ensure that the appropriate one is being handed out, i.e. avoid handing out a permission number which overrides a closed class when that is not the intent.

Once the permission number is used, the student's ID, the status of the permission number, and the permission use date will be displayed. In some examples, a student will use the number to add the class and then drop. Both of these actions will record on the status, but only the date of the last action will be noted.

Note: At this time, the order of sections is based on the class number rather than the section number. Please review the section number *before* distributing permission numbers.

Step	Directions	Screenshot
1	Navigate to Class Permissions.	Records and Enrollment > Term Processing > Class Permissions > Class Permissions > Permission to Add (tab)
2	Search for the desired term and class.	
3	Review the Course and Class Section data to confirm the correct class has been selected. This is an example: 	
4	Review the Class Permission Data for the generated numbers. General Info Tab – all permission numbers will display. Any numbers that have been issued cannot be re-issued.	

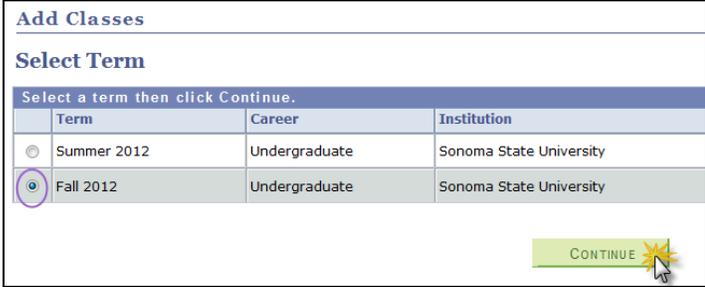
<p>5</p>	<p>Permission Tab – review the permission number options tied to each number. Changes to options can only be done by those with access.</p>	 <p>The screenshot shows the 'Class Permission Data' window with the 'Permission' tab selected. It displays a table with the following data:</p> <table border="1"> <thead> <tr> <th>Seq #</th> <th>Number</th> <th>ID</th> <th>Closed Class</th> <th>Requisites Not Met</th> <th>Consent Required</th> <th>Career Restriction</th> <th>Permission Time Period</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>642720</td> <td></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>2</td> <td>580635</td> <td></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Seq #	Number	ID	Closed Class	Requisites Not Met	Consent Required	Career Restriction	Permission Time Period	1	642720		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	580635		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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<p>6</p>	<p>Comments Tab – Review any comments added when generated.</p>	 <p>The screenshot shows the 'Class Permission Data' window with the 'Comments' tab selected. It displays a table with the following data:</p> <table border="1"> <thead> <tr> <th>Seq #</th> <th>Number</th> <th>ID</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>642720</td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>580635</td> <td></td> <td></td> </tr> </tbody> </table>	Seq #	Number	ID	Comments	1	642720			2	580635														
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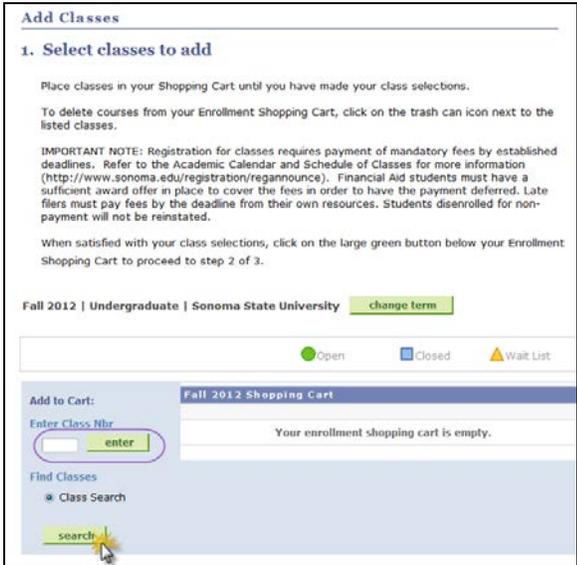
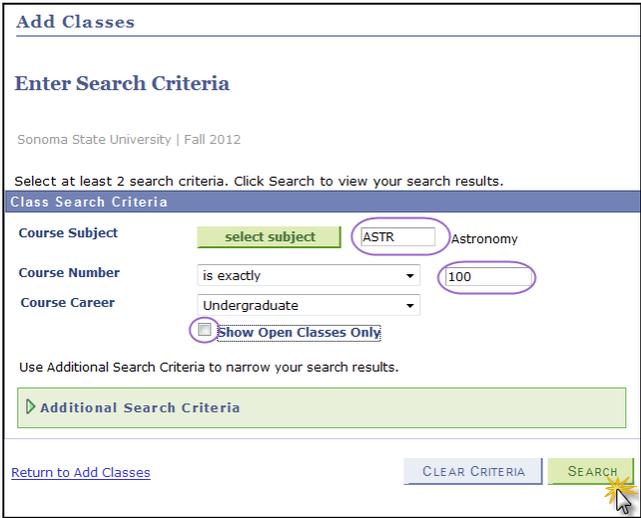
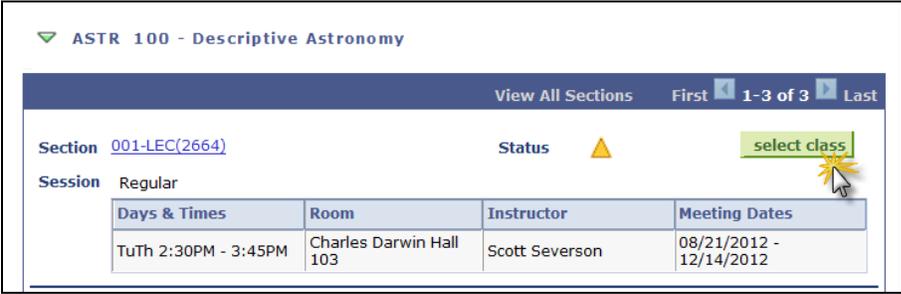
Lesson 4: How a Student Uses a Permission Number

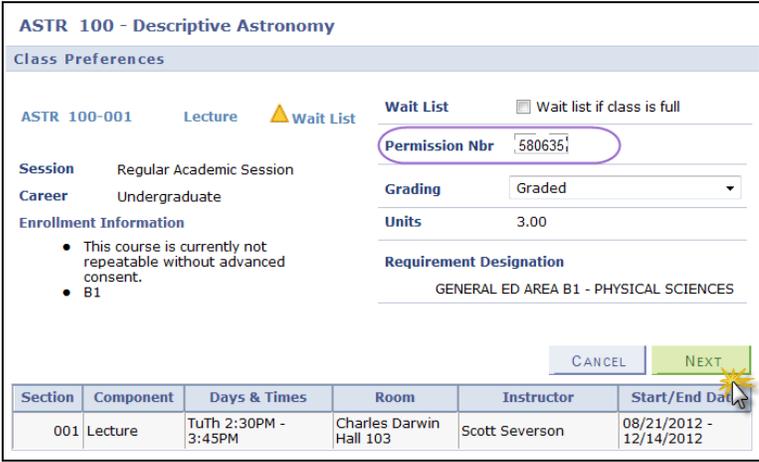
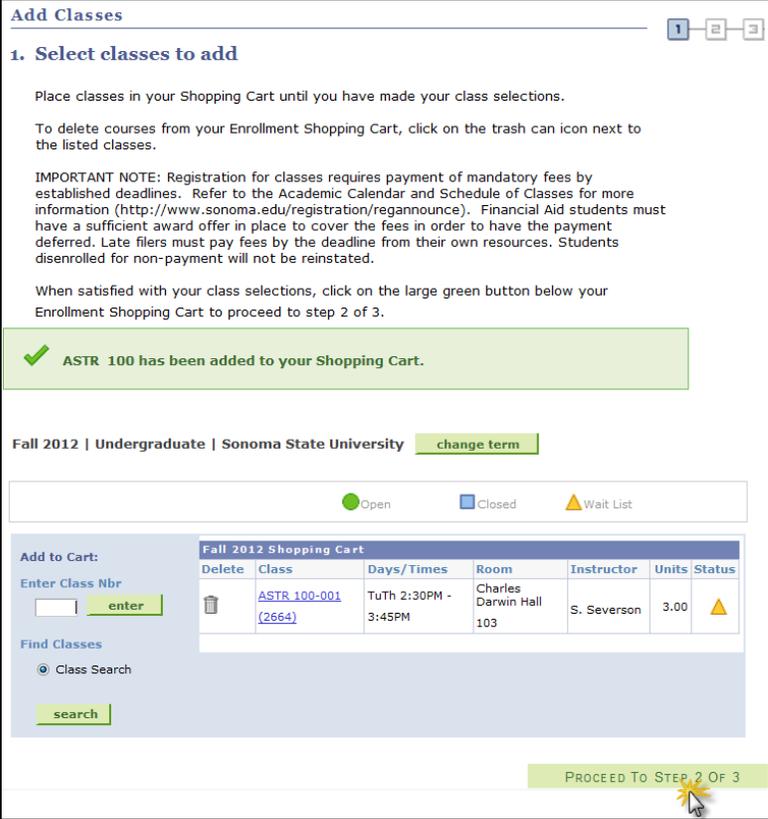
Navigation: Student Center > Enroll > Select Term if prompted > Search

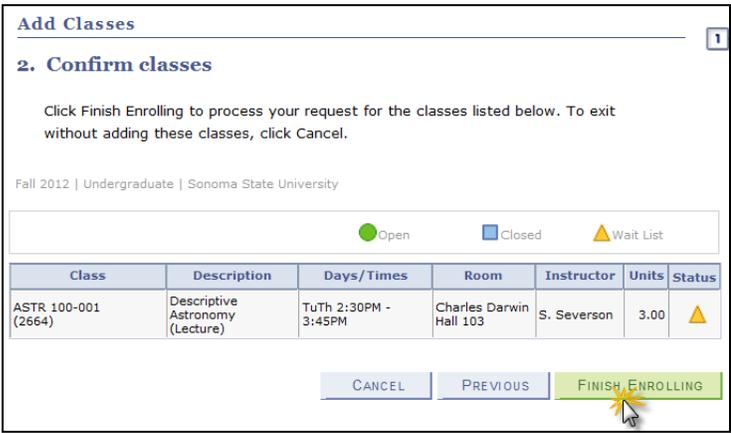
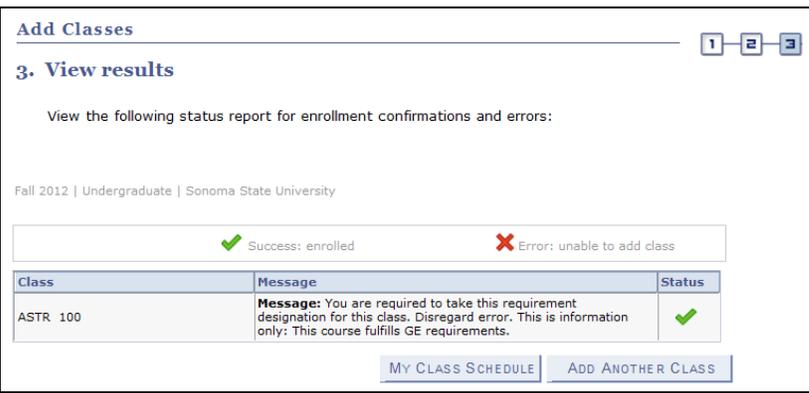
Introduction:

This lesson has been created to offer support to Department staff who are helping students use a distributed permission number. Student documentation can also be found on the Registrar's Office web site.

Step	Directions	Screenshot									
1	Navigate to Enroll in the Student Center.	 <p>The screenshot shows the 'Student Center' page for 'Anastasia's Student Center'. Under the 'Academics' menu, the 'Enroll' link is circled in blue. Other visible links include 'Class Search' and 'My Academics'. A 'Deadline' icon and 'Fall 2012' are also visible.</p>									
2	Select the appropriate Term. Click Continue.	 <p>The screenshot shows the 'Add Classes' page with the 'Select Term' section. A table lists terms for selection:</p> <table border="1" data-bbox="711 1245 1404 1360"> <thead> <tr> <th>Term</th> <th>Career</th> <th>Institution</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/> Summer 2012</td> <td>Undergraduate</td> <td>Sonoma State University</td> </tr> <tr> <td><input checked="" type="radio"/> Fall 2012</td> <td>Undergraduate</td> <td>Sonoma State University</td> </tr> </tbody> </table> <p>A 'CONTINUE' button with a mouse cursor is visible at the bottom right of the table.</p>	Term	Career	Institution	<input type="radio"/> Summer 2012	Undergraduate	Sonoma State University	<input checked="" type="radio"/> Fall 2012	Undergraduate	Sonoma State University
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<p>3</p>	<p>Enter the Class Nbr or click Search.</p>	
<p>4</p>	<p>Complete the search criteria. Verify that the Course Career is correct and if necessary, uncheck Show Open Classes Only to view all classes including waitlisted.</p> <p>Click Search.</p>	
<p>5</p>	<p>Click Select Class after reviewing the meeting pattern.</p>	

<p>6</p> <p>Enter the Permission Nbr provided by the department.</p> <p>Click Next.</p>	 <p>ASTR 100 - Descriptive Astronomy</p> <p>Class Preferences</p> <p>ASTR 100-001 Lecture ▲ Wait List Wait List <input type="checkbox"/> Wait list if class is full</p> <p>Permission Nbr 580635</p> <p>Session Regular Academic Session</p> <p>Career Undergraduate</p> <p>Grading Graded</p> <p>Units 3.00</p> <p>Requirement Designation GENERAL ED AREA B1 - PHYSICAL SCIENCES</p> <p><input type="button" value="CANCEL"/> <input type="button" value="NEXT"/></p> <table border="1"> <thead> <tr> <th>Section</th> <th>Component</th> <th>Days & Times</th> <th>Room</th> <th>Instructor</th> <th>Start/End Dates</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>Lecture</td> <td>TuTh 2:30PM - 3:45PM</td> <td>Charles Darwin Hall 103</td> <td>Scott Severson</td> <td>08/21/2012 - 12/14/2012</td> </tr> </tbody> </table>	Section	Component	Days & Times	Room	Instructor	Start/End Dates	001	Lecture	TuTh 2:30PM - 3:45PM	Charles Darwin Hall 103	Scott Severson	08/21/2012 - 12/14/2012									
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<p>7</p> <p>Click Proceed to Step 2 of 3.</p>	 <p>Add Classes</p> <p>1. Select classes to add</p> <p>Place classes in your Shopping Cart until you have made your class selections.</p> <p>To delete courses from your Enrollment Shopping Cart, click on the trash can icon next to the listed classes.</p> <p>IMPORTANT NOTE: Registration for classes requires payment of mandatory fees by established deadlines. Refer to the Academic Calendar and Schedule of Classes for more information (http://www.sonoma.edu/registration/regannounce). Financial Aid students must have a sufficient award offer in place to cover the fees in order to have the payment deferred. Late filers must pay fees by the deadline from their own resources. Students disenrolled for non-payment will not be reinstated.</p> <p>When satisfied with your class selections, click on the large green button below your Enrollment Shopping Cart to proceed to step 2 of 3.</p> <p>✔ ASTR 100 has been added to your Shopping Cart.</p> <p>Fall 2012 Undergraduate Sonoma State University <input type="button" value="change term"/></p> <p><input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> Wait List</p> <table border="1"> <thead> <tr> <th colspan="7">Fall 2012 Shopping Cart</th> </tr> <tr> <th>Delete</th> <th>Class</th> <th>Days/Times</th> <th>Room</th> <th>Instructor</th> <th>Units</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td></td> <td>ASTR 100-001 (2664)</td> <td>TuTh 2:30PM - 3:45PM</td> <td>Charles Darwin Hall 103</td> <td>S. Severson</td> <td>3.00</td> <td>▲</td> </tr> </tbody> </table> <p><input type="button" value="PROCEED TO STEP 2 OF 3"/></p>	Fall 2012 Shopping Cart							Delete	Class	Days/Times	Room	Instructor	Units	Status		ASTR 100-001 (2664)	TuTh 2:30PM - 3:45PM	Charles Darwin Hall 103	S. Severson	3.00	▲
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<p>8</p> <p>Click Finish Enrolling.</p>		
<p>9</p> <p>View the results after enrollment has been completed.</p> <p>Click My Class Schedule to view complete enrollment.</p>		
<p>10</p> <p>Departments can track the use of the permission number by navigating to the Class Permission</p>		