2017

SPA User Guide

SPA WORKING GROUP

VERSION 2

CONTENTS

INTRODUCTION

Every term the three colleges (CAHSS, CNRS, and CPS) must match academic resources with necessary curriculum in order to ensure that students have access to the classes they need and that each college is in line with their budgets and contract requirements.

This involves a difficult and complex set of tasks which include the analysis of curriculum requirements, evaluating (and predicting) student needs (current and future), accounting for faculty availability (including leaves, sabbaticals, release times, lecturers etc.) and comparing the results against the limits of budget and funding.

Academic Department Coordinators and Budget Analysts use SPA, **Schedule Planning and Analysis,** a web application to plan out an academic year of classes to be offered with instructor teaching and non-teaching assignments. From SPA, they generate reports that are used by Deans and Chairs to finalize and approve the plan before it becomes a part of the official system of record, PeopleSoft.

So while SPA lives in PeopleSoft. Its data is separate from the official PeopleSoft data until the plan has been approved and transferred to official PeopleSoft tables and records.

Data is transferred from SPA to official PeopleSoft tables and records by both direct manual entry and programmatic processes.

OVERVIEW OF SPA

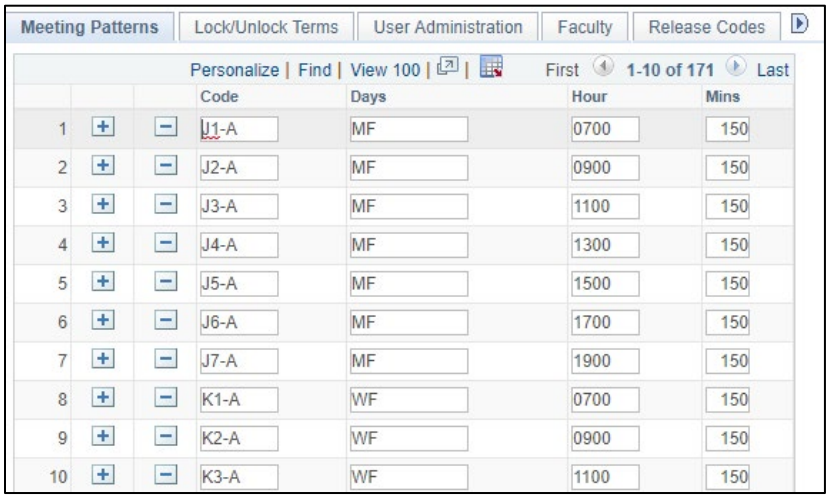
The SPA (Scheduling, Planning, and Analysis application consists of several modules.

- SPA Administration
- SPA Reports
- Scheduling Planning and Analysis
- SPA Data Push
- SPA Term Roll

SPA ADMINISTRATION

SPA Administration is only accessible by the SPA Administrator and specified ITS personnel and is used to configure the SPA application and apply user level permissions within SPA.

Fig. 1 SPA Administration Module

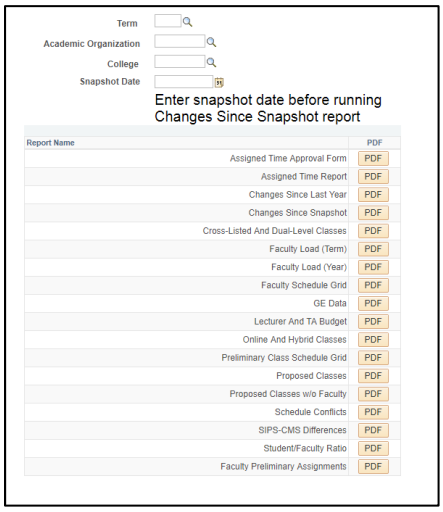


	Code	Days	Hour	Mins
1	J1-A	MF	0700	150
2	J2-A	MF	0900	150
3	J3-A	MF	1100	150
4	J4-A	MF	1300	150
5	J5-A	MF	1500	150
6	J6-A	MF	1700	150
7	J7-A	MF	1900	150
8	K1-A	WF	0700	150
9	K2-A	WF	0900	150
10	K3-A	WF	1100	150

SPA REPORTS

The SPA Reports module is where all of the SPA reports are generated.

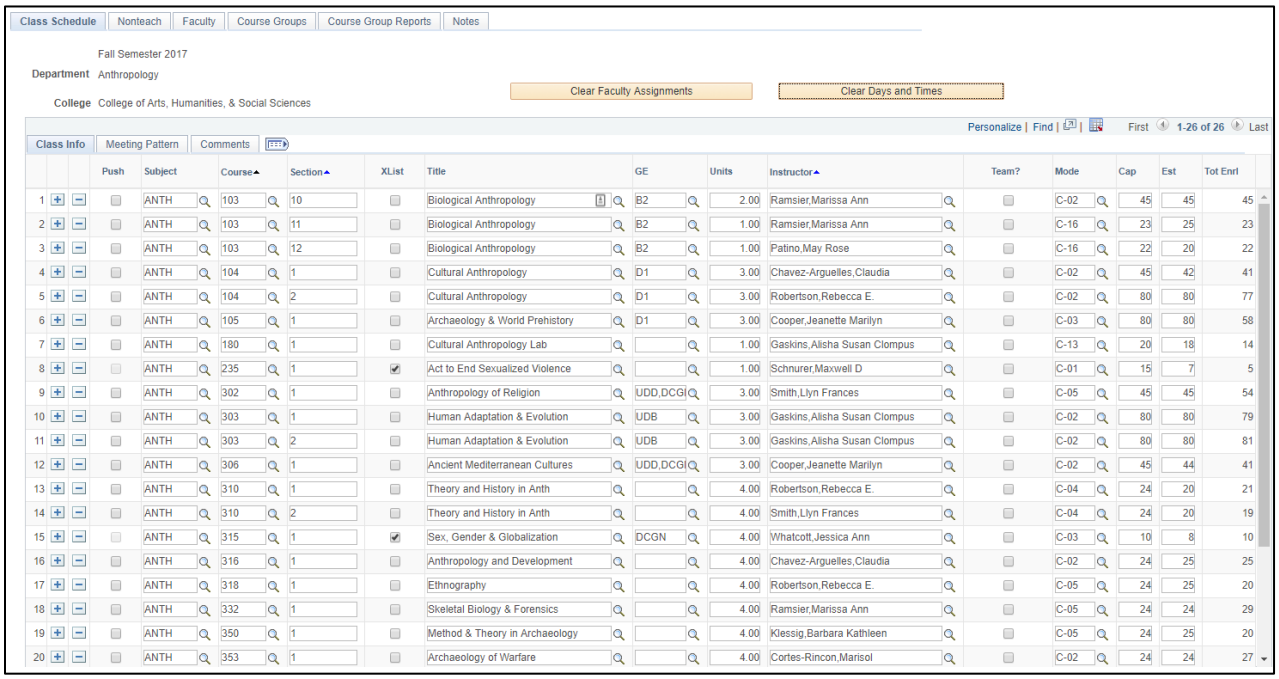
Fig. 2 SPA Reports Module



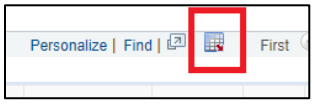
SCHEDULING PLANNING AND ANALYSIS

The Scheduling Planning and Analysis module is where most of the planning work is performed by Administrative Support Coordinators (ASCs).

Fig. 3 Scheduling Planning Analysis Module



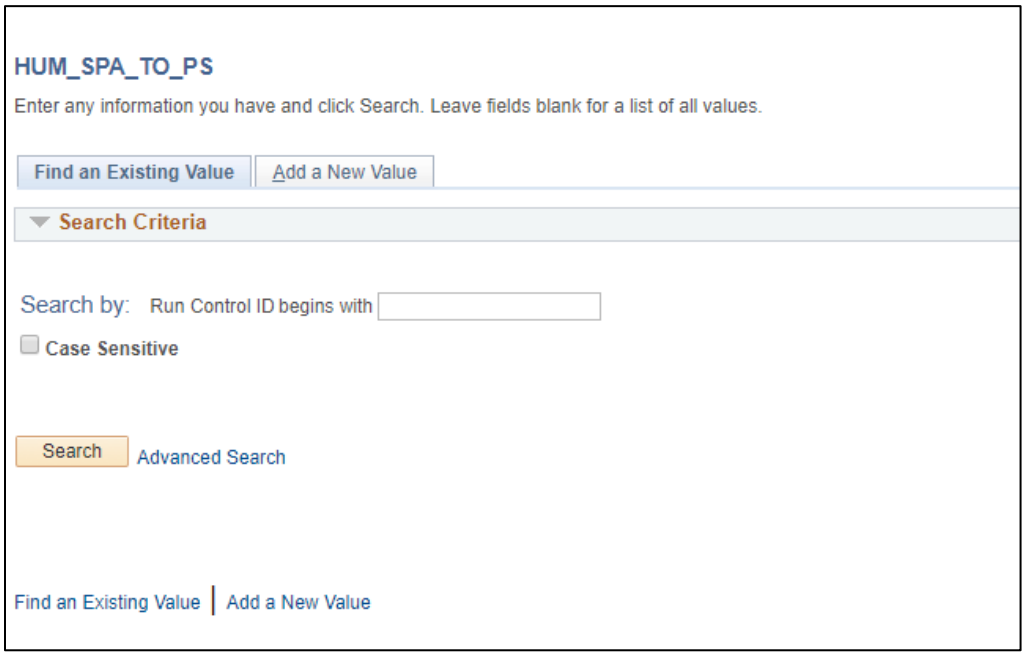
Data contained in all tabs can be downloaded into Excel by clicking on the spreadsheet icon.



SPA DATA PUSH

The SPA Data Push module is where ASCs pushed selected data from SPA into PeopleSoft.

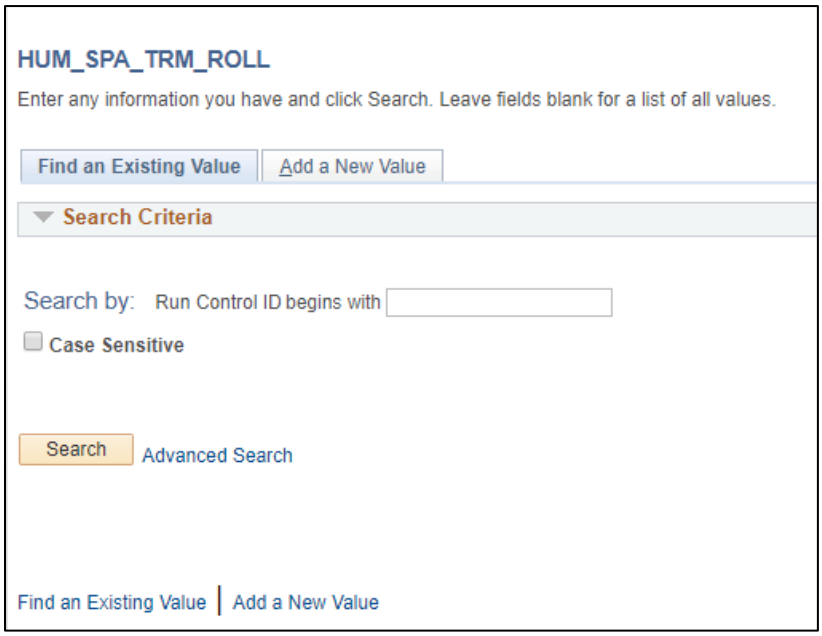
Fig. 4 SPA Data Push Module



SPA TERM ROLL

The SPA Term Roll module is accessible only the by the SPA Administrator and specified ITS personnel and is used to copy and roll forward previous academic year planning data forward to the next academic year to serve as a base for planning.

Fig. 5 SPA Term Roll Module



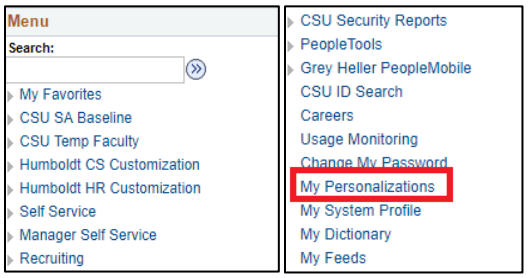
SETTING UP SPA

To realize the navigational and data entry efficiencies in PeopleSoft, there are a few set up steps that need to be performed before accessing SPA.

AUTO COMPLETE

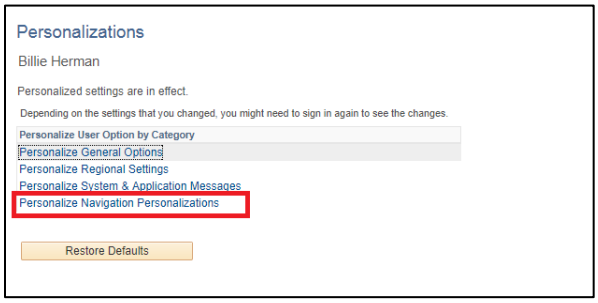
To set up Auto Complete in My Personalizations, start from the Main Menu in PeopleSoft and select My Personalizations.

Fig 5A, B. My Personalizations



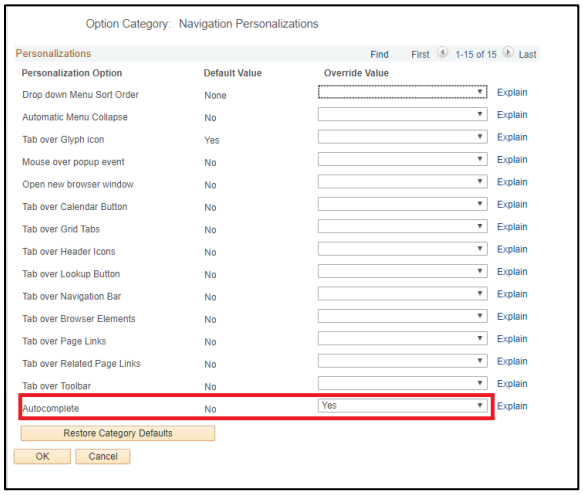
Next select Personalize Navigation Personalizations.

Fig 5B Navigation Personalizations



Finally, set the Autocomplete option to "Yes."

Fig 5C Selecting Autocomplete



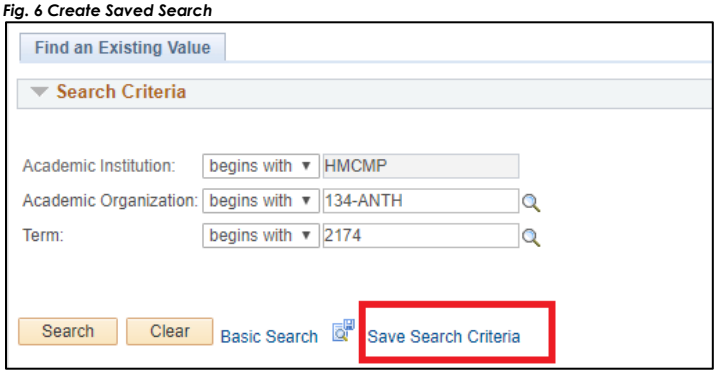
You have successfully set up Autocomplete and can use type aheads in all of your PeopleSoft work areas.

Note: Choosing this setting will apply to all areas of PeopleSoft.

SAVED SEARCHES

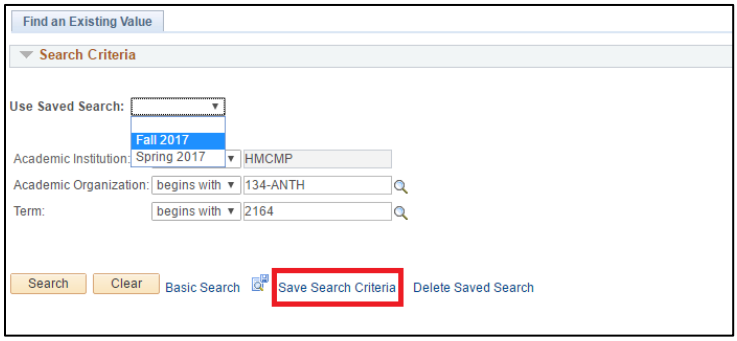
You can create saved searches with the department and term already specified. To save a search, specify the department and term, then click on Save Search Criteria, name your search and click Save. You can create several saved searches.

Fig. 6 Create Saved Search



Once you have saved a search you can now use it to quickly access the desired department and term by clicking on the Use Saved Search dropdown and selecting the appropriate saved search.

Fig. 6A Select Saved Search

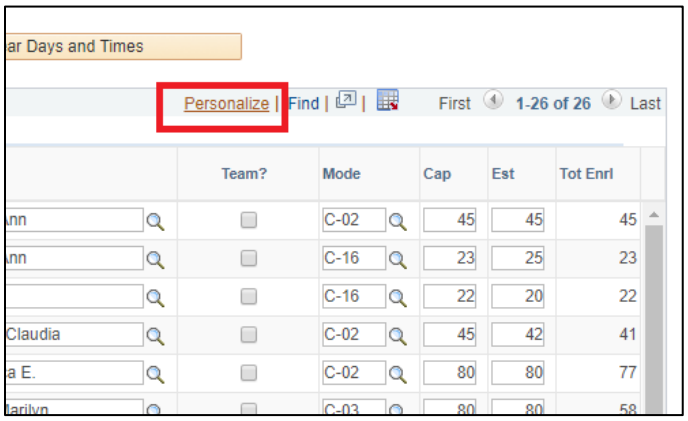


CUSTOMIZED SORT

You can customize the sort order of your data – this applies in particular to the sorting of Sections on the Class Schedule.

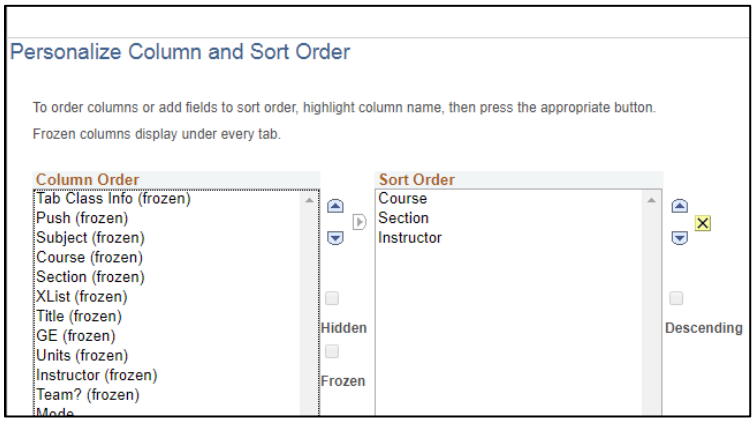
Click on Personalize.

Fig 7 Personalize



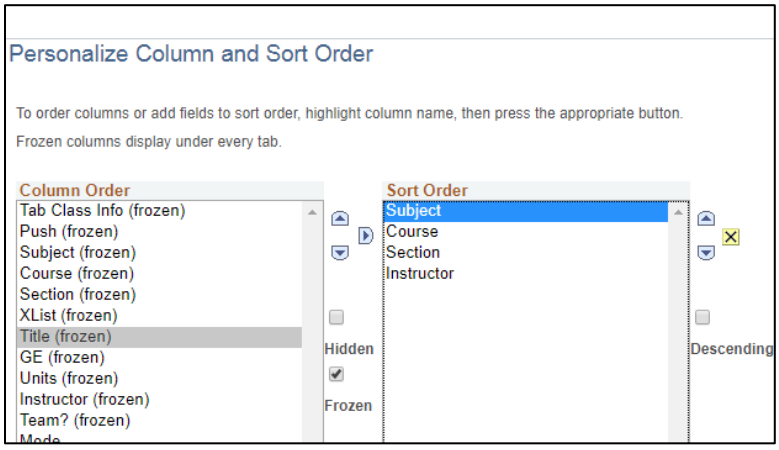
If you manage one department, click on "Section" in the Column Order use the arrows to move it to the Sort Order column. Then select it and use the arrows to move into the second position.

Fig 7A Add Section to Sort Order



If you manage more than one department, click on "Subject" in the Column Order use the arrows to move it to the Sort Order column. Then select it and use the arrows to move into the first position.

Fig 7B Add Subject to Sort Order



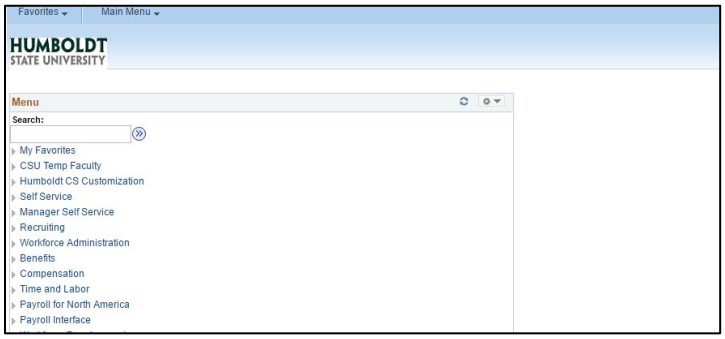
Your Section number will now sort in ascending order.

ACCESSING SPA

Access to SPA is controlled via PeopleSoft security roles. If you think you should have access to SPA but do not, please contact your college's Budget Analyst.

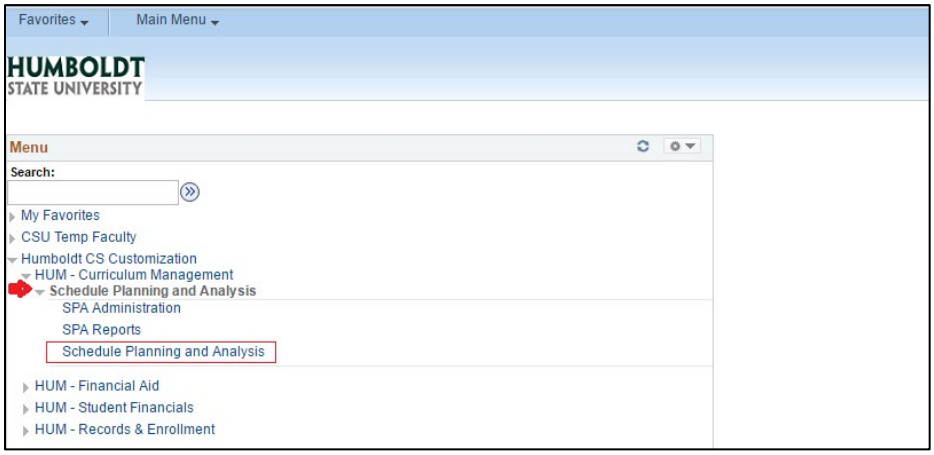
To access SPA, log into PeopleSoft HCM.
https://cmsweb.humboldt.edu/psp/HHUMPRD/EMPLOYEE/HRMS/h/?tab=DEFAULT

Fig. 8 Main Menu



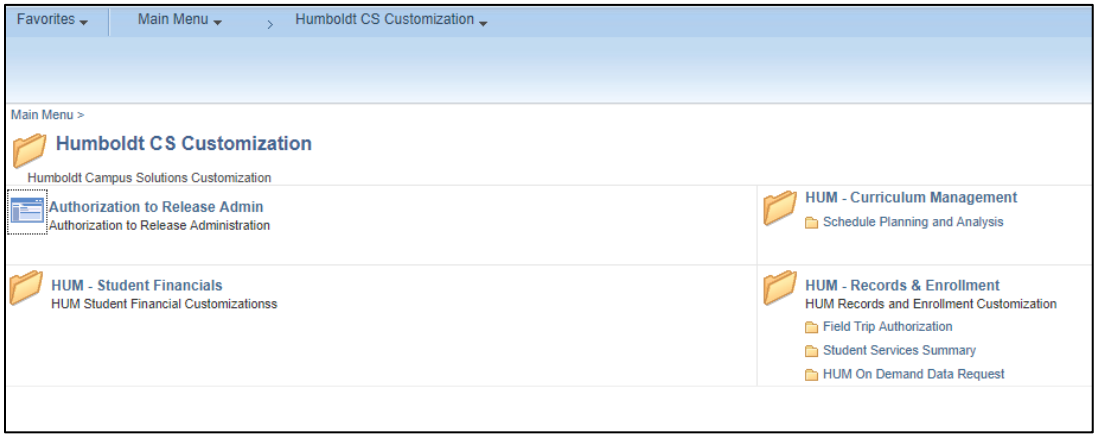
From here, click on the down arrow for Humboldt CS Customization and then Schedule Planning. Next, click on Schedule Planning and Analysis link in the dropdown list to be taken to the Search page.

Fig. 9 SPA Link



Alternatively, you can open the Humboldt CS Customization link.

Fig 9A Open SPA Link

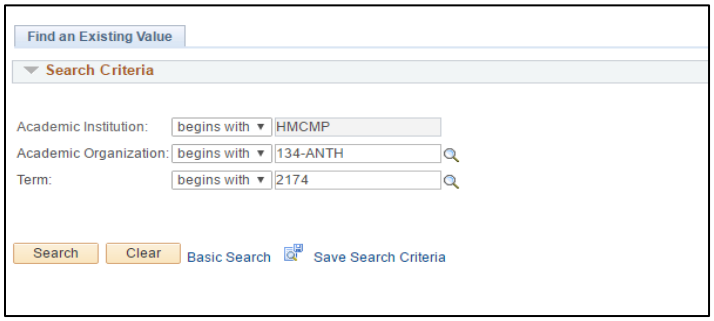


SEARCH PAGE

The Search page is where you determine which department and term you want to access. The department value defaults to the department to which you have write access (able to make and save changes). The departments are listed in alphabetical order so If you have write access to more than one department, the department name that comes earlier in the alphabet is the default department.

If you only have read access (can see data, including instructor information, but cannot change data), the department that you have read access to is the default department and in the case of multiple departments, the department name that comes earlier in the alphabet is the default department.

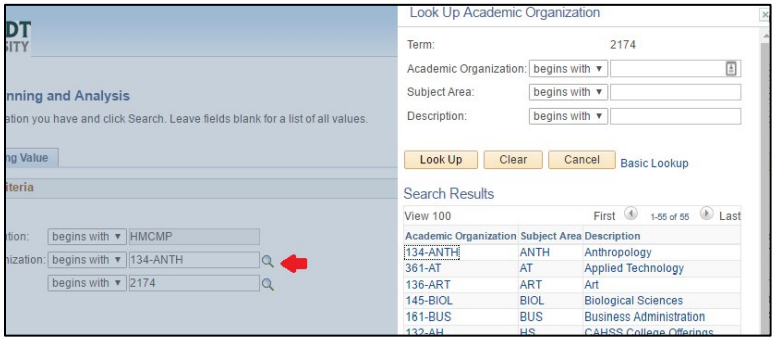
Fig. 10 Search Page



LOOK-UPS

You can use the Look-Up feature to find a department or term.

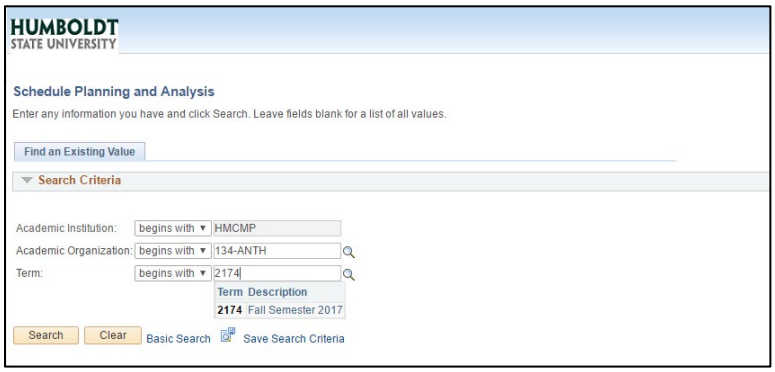
Fig. 11 Look-Ups



TYPE AHEADS

You can also just start typing the department or term to have the full value appear that you can then select.

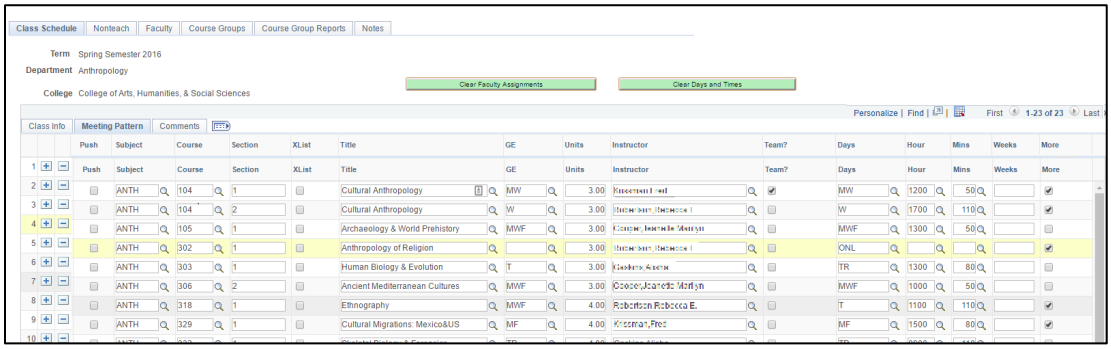
Fig 12. Type Aheads



SCHEDULING PLANNING ANALYSIS (SPA)

From the Search page, you are taken into SPA. The Class Schedule tab is the default view.

Fig. 13 Class Schedule Tab



You can move between the tabs and make changes without having to save those changes on each tab. When you exit SPA, you will be asked if you want to save your changes.

Fig. 14 Exit SPA

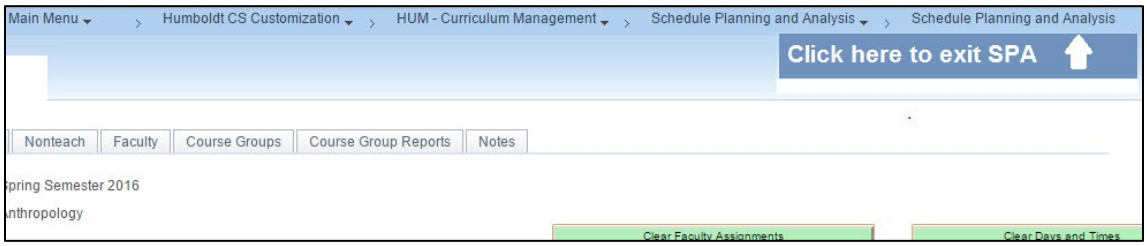
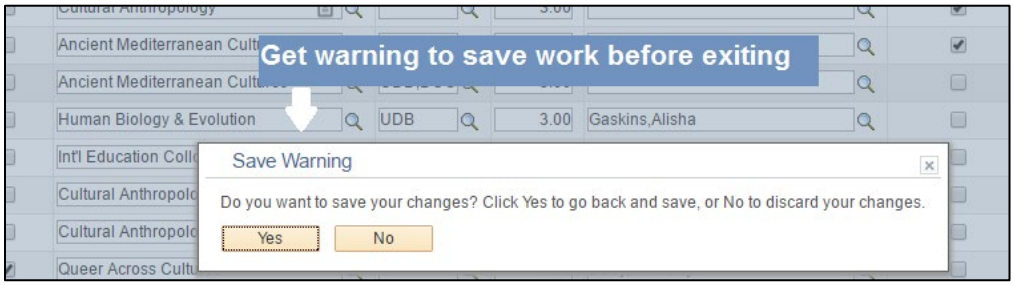


Fig. 14a Saving Work



PLANNING WITH SPA

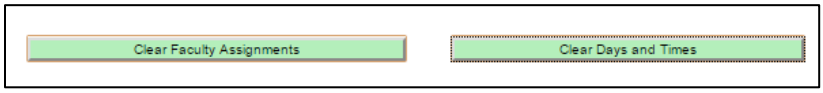
All three colleges conducts its business in slightly different way, but all follow a general process for planning classes and instructor workload as laid out by the Office of Registrar and Academic Personnel Services.

PREPARE FOR PLANNING

The SPA Administrator (designated administrator of the SPA application – currently Gina Pierce in CAHSS) prepares for planning the future academic year by rolling the current academic year's Spring and Fall term data into the future academic year's Spring and Fall terms. This provides a baseline from which the new terms will be planned.

All classes, instructor assignments (teaching and non-teaching) and instructors rolls forward. If you do not want to start from this baseline, you can remove some of the data by using the Clear Faculty Assignments and or the Clear Days and Times features.

Fig.15 Clear Data



Clear Faculty Assignments will clear all instructor assignments on the Class Schedules. The Clear Days and Times will clear all entries in the Days, Hours, and Min fields – including those on additional meeting patterns on the More tab.

Note: These actions cannot be reversed once executed, so please be sure of these options before taking them.

Conformation to scheduling guidelines

Please conform to the percentage distribution of courses within your department prior to room scheduling activities begin (large lecture, lab, disabled faculty, schedule 25). The percentage distribution of courses can be found on the Office of the Registrar's website.

PLANNING CLASSES, MEETING PATTERNS, AND INSTRUCTOR CLASS ASSIGNMENTS

The Class Schedule tab is where all teaching assignments are entered. It contains a grid of classes arranged in rows, with all associated class information needed to carry out planning of an academic year.

The far right section of the Class Schedule tab has three views –Class Info, Meeting Pattern, Comments. Each of these views displays columns of specific data across the rows.

From right to left, each row on the Class Schedule has the following fields.

ADD/DELETE CLASS

Clicking on the plus sign ⊞ will add a row to the grid of classes. The values in the Subject, Course, Title, GE, Units, Mode, Cap and Estimated fields are copied from the preceding row into the new row. By default, the section number in the new row will increase by one, but this value can be overridden as needed.

Even though fields are copied, all fields can be edited as desired, allowing you to use some, all, or none of the copied information.

To delete a row form the grid of classes, click on the minus sign. ⊟

PUSH

Clicking on the Push checkbox is how you select a class for which you want to push the meeting pattern data, and some other class data from SPA into PeopleSoft. ***Please see [How to Push data to PeopleSoft](#) for more detail.***

SUBJECT

The subject field contains the area of study that the class falls under. This field auto-populates based the Academic Organization selected on the Search page.

COURSE

A course is a series of classes, on a particular subject, usually lasting a whole semester. So course is the whole, while classes/sections are parts of that whole. This field on an existing row is originally populated with corresponding data from the previous term and can be edited as needed by either typing directly into the field or via the Look-Up.

SECTION

The Section field lays out the differentiating sections of a class that usually have different meeting patterns.

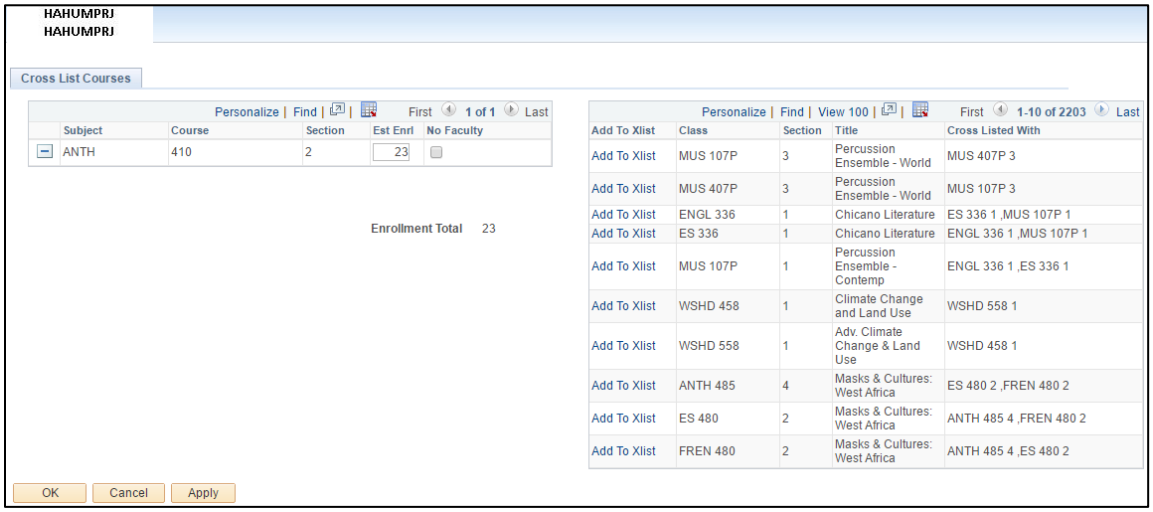
e.g.

- ANTH 104, Section 1
- ANTH 104, Section 2

XLIST

Checking this check box will take you to the cross listing page where you can cross list other classes with the class displaying on the Class Schedule.

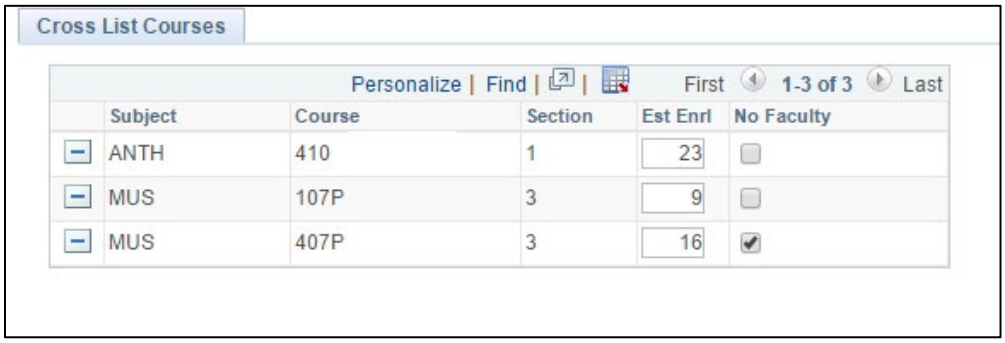
Fig. 16 X-List Page



The class from which you launched the XList tab is the primary class listed on the left side of the page. The classes eligible to be cross listed with the primary class are listed on the right side of the tab. To cross list classes, find the class you want to cross list with the primary class and click on "Add to Xlist."

The added class will now display on the left side of the tab, plus any classes it is already cross listed with, under the primary class.

Fig.17 X-Listed Classes



Cross List Courses

Personalize | Find | First 1-3 of 3 Last

Subject	Course	Section	Est Enrl	No Faculty
ANTH	410	1	23	☐
MUS	107P	3	9	☐
MUS	407P	3	16	☑

Enter the estimated enrollment for the other section. The estimated enrollment on the main schedule form should be the estimate for that part of the cross list. For example, a class with a cap of 30 that expects to have 20 students from your department and 10 from another will have 20 entered on the main schedule form and 10 entered on the cross-list form for the other section. The actual estimate will be the sum of the two numbers. The FTES generated will split between the departments; the WTUs will be split between the departments/classes that do not have a check in the "no faculty" box.

When finished, click the okay button to save changes and return to prior screen.

Note: If a class is taught by more than one professor, see guidelines for entering team taught classes later in this guide.

TITLE

The Title field is associated with the Course field so that when adding a new class/section, entering or changing the Course field results in the Title field populating with the title for the selected course. This field can be overridden with any value by simply typing over the current text.

GE

This field designates all course attributes, including GE (general education) and others. For classes already existing in SPA, this field will automatically populates. ***The only time you should change*** this field is when you enter a class/section for a new course or the GE designation changes due to a curricular change.

It is important that the GE is correctly identified and matches with the course catalog in PeopleSoft. To determine the GE designation in PeopleSoft, go to the following location in PeopleSoft:

- Main menu
- Curriculum Management
- Course Catalog
- Course Catalog (again);
- Enter subject area (example ANTH)
- Enter Catalog Number (example 104)
- Click 'search'; the page that appears is the Catalog Data – at the bottom of the screen in the Course Attributes section, "GE" will be listed if the course is a GE course.

The data in the Course Attribute Value column is the GE designation you enter in the database. In this example the GE Designation is D1.

If the course has no GE designation, then "GE" does not appear as a course attribute and you leave the GE field blank on the database.

UNITS

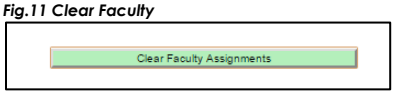
The units shown in this database are the component student credit units (SCU), which may not match the SCU for the entire course. For classes already existing in SPA, this field populates with the correct units as long as you enter each component associated with the course. For example, a course with both a lecture and a lab will be entered as two lines with total course units divided between the lines.

When entering a new course, you must enter each component with the appropriate mode or C-classification. See the Mode section for more details.

INSTRUCTOR

When you first start planning a term, the instructor field is automatically populated with the name of the instructor who previously taught the class. You can elect to clear all of the instructor assignments on the Class Schedule and start with a "blank slate" by clicking on the "Clear Faculty Assignments" on the Class Schedule.

Fig.11 Clear Faculty



There are several ways that you can edit the instructor name.

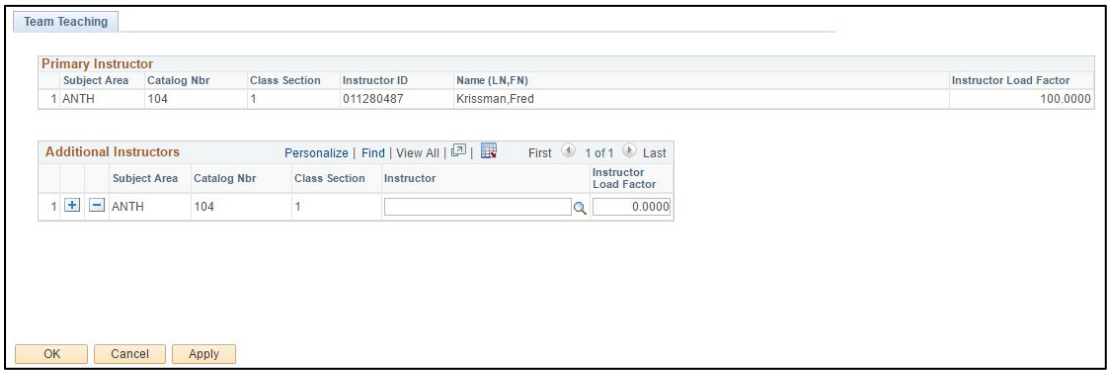
- Select the lookup icon to select a new instructor or
- Start typing a last name, select an instructor from the drop down list presented
- Highlight an instructor's name, right click to copy or press Ctrl C, navigate to another instructor name field and highlight the name in the field and right click to paste or press Ctrl V

Note: For an assignment to be included in a report, you must enter an instructor name or placeholder text.

TEAM

If a class is taught by more than one instructor, check the "Team?" checkbox. This will open up the Team-Teaching page where the primary instructor is automatically displayed as well an open row ready for you to start typing the name of the additional instructor.

Fig. 18 Team Teaching



If you do not enter a percentage in the "Instructor Load Factor" field and just click "Apply", SPA will assume it's an even split between the two instructors and assign 50% to each. If you enter a percentage for the additional instructor, SPA will adjust the percent allocated to the primary instructor. e.g. Enter 25% for additional instructor, the allocation to the primary instructor will adjust to75%.

For more than two instructors, when you click on the plus sign to add the next instructor, you will be asked if you want to split the percentage evenly. You can choose to do so or you can add any percentage and SPA will adjust all other allocations accordingly.

Max Allocation is 100%

SPA will not allow you to exceed 100% in the allocation among instructors. If you do, the allocation field will turn red and you will see a "negative number" error message display. To correct, simply remove the allocation that caused the error and enter a new allocation value that is within the overall 100 % allocation.

CLASS SCHEDULE - CLASS INFO VIEW

After the "Team?" column, the columns that display on the Class Schedule can be changed by clicking on the Class Info, or Meeting Pattern, or Comments tab.

The Class Info view includes the columns: Mode, Cap, Est., and Total Enrollment.

MODE

The teaching mode (aka c-classification) determines how the WTU for a particular class is calculated. For pre-loaded classes, this field will self-populate from the previous. However, you can change this field if necessary due to curricular changes changing the mode or if creating a new class.

CAP AND ESTIMATED

For pre-loaded classes, this data will self-populate with the prior semester data. Change as needed depending on room size (cap) and estimated enrollment. If an x-listed class, refer to notes on x-listing and how to correctly enter the estimated enrollments.

Zero enrolled classes' data entry differs depending on the college you are in. Each college prefers the following data entry for zero enrolled classes:

- CAHSS
  - Enter as normal and enter "zero enrolled" in Comments
  - This will result in the class calculating FTES, WTU, and showing up on reports
- CNRS
  - Change the cap and the estimated enrollment to zero
  - enter "zero enrolled" in Comments
  - This will result in the classes not showing on faculty load or proposed class list, nor will any FTES or WTU calculate for the class.
- CPS
  - Change the cap and the estimated enrollment to zero. Enter "zero enrolled" in Comments
  - This will result in the classes not showing on faculty load or proposed class list, nor will any FTES or WTU calculate for the class

ENROLLMENT

As a semester opens for enrollment, the Total Enrollment field is auto populated with actual enrollment numbers.

CLASS SCHEDULE - MEETING PATTERN VIEW

After the "Team?" column, the columns that display on the Class Schedule can be changed by clicking on the Class Info, or Meeting Pattern, or Comments tab.

The Meeting Pattern view includes the columns: Days, Hours, Mins, and Weeks. It also includes the "More" checkbox where additional meeting patterns can be scheduled.

DAYS

Select the day combination from the look-up list or simply start entering the day combination in the Days field.

Classes that are completely online can be indicated from this menu by selecting ONL. Hybrid classes are indicated by 2 or more meeting patterns where at least one meeting pattern is ONL while the other meeting patterns reflect the face to face session(s).

HOUR

All classes must begin at the top of the hour, except for 1.5 hour classes beginning at 0730.

MINUTE

Enter minutes for the class - keeping in mind that the class should end 10 minutes before the hour (or before the half-hour for a 1.5 hour class).

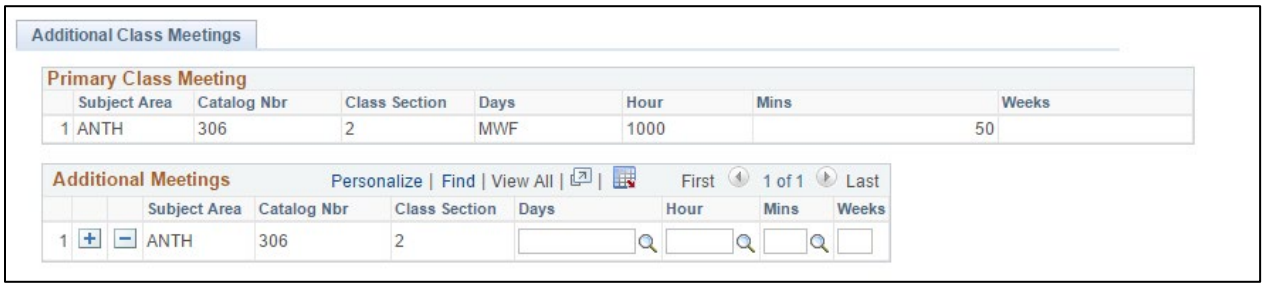
WEEKS

If a class is less than full term, indicate the total number of weeks the class is offered. Otherwise you can leave this field blank. ***Note: If blank, SPA will assume the class is offered the full term for report calculations, etc.***

MORE

When you click the "More? checkbox:, a page opens up that allows you enter multiple schedules, such as meeting at a different day or time or a hybrid class that has both online and face-to-face components.

Fig.19 More Meeting Patterns



Hybrid Classes

Hybrid classes are classes that have more than one meeting pattern and at least one of the meeting patterns is ONL indicating an online meeting pattern. The ONL meeting pattern can be selected and displayed on either the Class Schedule or on the "More?" page – both methods will result in the correct recording of a hybrid class.

CLASS SCHEDULE - COMMENTS VIEW

After the "Team?" column, the columns that display on the Class Schedule can be changed by clicking on the Class Info, or Meeting Pattern, or Comments tab.

The Comments view only adds one column where you can enter collateral information about a class. Any information entered here will display on reports that include a Comments column. ***Note: The Comments field is limited to 30 characters – including spaces.***

PLANNING NONTEACH ASSIGNMENTS (AKA ASSIGNED TIME, COLLATERAL DUTIES, AND LEAVE)

Assigned time (including excess enrollment), collateral duties, and leaves are reported on the Non Teach tab. Assigned Time, collateral duties, and leave will roll from current term to future term. All rolled WTU values and descriptions should be reviewed and changed as needed.

Assigned Time

- Any data on the assigned time form with a release code will appear on the Assigned Time Approval Form, which is used to report assigned time to Academic Personnel Services. The data reported on this form will eventually be uploaded to ABDB (Academic Personnel Database).
- For reporting assigned time, completing the **WTUs, rel. code (release code), and funding** are mandatory fields. The dropdown on the release code will show the meaning of each code.
- For a list of assigned time codes, definitions, and commonly used funding associated with the codes, refer to the Assigned Time Appendix.

Collateral Duties

- The **WTU field** is mandatory, release code and funding should remain blank.
- Data reported as collateral duties will not be included in the Assigned Time Approval form.

Leave

- Indicate WTU value of 0
- Data reported as leave will not be included in the Assigned Time Approval form
- In notes, indicate reason for leave: sabbatical, DIP, LWOP, FERP semester not teaching, other

INSTRUCTOR

This field functions just like it does on the Class Schedule. You can edit name in the instructor field as needed. If the assigned time is no longer applicable to the term, you can delete the row.

- Select the lookup icon to select a new instructor or
- Start typing a last name, select an instructor from the drop down list presented
- Copy and paste from another instructor field

Note: If an instructor name does not appear in the lookup or drop down lists, you will need to them on the Faculty Table. See the Faculty Table section for more information.

FACULTY TYPE

The Faculty Type will automatically populate from the Faculty Table.

- TTF = Tenure Track Faculty
- CHR = Chair
- LCT = Lecturer
- FRP = FERP

Instructors may only have **only 1 type** associated to them, unless they are both a TT Faculty and Chair. Use the Look-Up on this field to toggle between Chair and TT Faculty for those instructors who have both types.

See the Faculty Table section for more information.

Note: this is a required field and must have an entry before you can save the assignment.

ASSIGNMENT TYPE

Click the down arrow in the field to open the list, and then select the assignment type.

- Assigned Time
- Collateral Duties
- Leave

DESCRIPTION

The description field is a direct entry field where you can add any kind of descriptive context to the assignment and will be displayed on the Assigned Time Report and Assigned Time Approval Form.

Note: this is a required field and must have an entry before you can save the assignment.

REL CODE

Rel Code stands for Release Codes. Use the Look-Up to find the desired release code or you can enter it and use the look ahead selection provided. If you are unsure of which code to use, contact your college budget analyst.

Note: this is a required field for Assigned Time assignments.

WTU

In this field, enter the WTUs associated with the assignment type.

Note: this is a required field for Assigned Time assignments, Collateral Duties, and Leaves assignments.

FUNDING

This field will automatically populate with the correct funding source in all cases except for release code OSFa. If using OSFa, your options should be University or Chancellor. When in doubt, consult your college budget analyst.

Note: this is a required field for Assigned Time assignments.

COMMENTS

In this field, enter any information about the assignment needed for your planning efforts.

REVISED

This check box is for the Assigned Time Approval Form report. If you check this box, an "x" will display in the "Rev" column of the Assigned Time Approval Form indicating to APS that this is revised information.

Fig.20 Revised

Assigned Time Approval Form

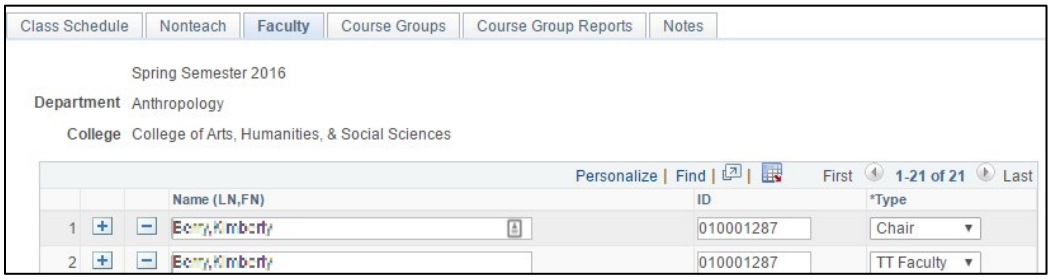
Fall Semester 2017 — Department of Anthropology

HSU ID	Instructor	Fac Typ	Rel Cod	Description	Fund	WTUs	Assignment Description	Notes	CD	TF	PS	Rev
[illegible]	[illegible]	TTF	22	Instructional Experimentation	College	4.00	assigned time - CRF	MA Development and Arch Review				X
[illegible]	Cortes Rincon,Maribel	CHR	IAF	Department Chair, AY	College	6.00	chair duties					
[illegible]	[illegible]	LCT	22	Instructional Experimentation	College	1.70	assigned time - CRF	Historical Documents				

FACULTY TABLE

The Faculty Table tab is where you add faculty to the term you are planning. Faculty entered here will display in the all the instructor fields on the Class Schedule, Non Teach, Cross Listed, etc. pages. You can add or delete instructors as needed on this tab. Deleting an instructor is term specific; for example: if an instructor taught fall 2016, and you deleted the instructor name from fall 2017, the instructor remains in the fall 2016 faculty table.

Fig.21 Faculty Tab



You can add placeholders in cases where you are not yet sure who the instructor will be. Just enter any text in the Name field, but be sure to follow the name format (LastName,FirstName MI) to avoid an error message. You will notice that there is no space between the last and first name but there is a space between the first name and middle initial.

When you add a faculty placeholder, a placeholder value is created as well in the ID field. Once you have identified the actual faculty represented by the placeholder, you will need to update this value to the now named faculty's actual employment identification number located in PeopleSoft.

Note: Deleting faculty from this table will NOT remove any associated assignments. Those assignments, will exist but without an associated instructor.

Faculty Type

The Faculty Type for each faculty is set on this page.

Field	Class Schedule	Non Teach	Use
Chair	No	Yes	Use this designation only on the assigned time and collateral duties form to indicate WTU assigned to chair duties only.
FERP	Yes	Yes	Use to identify FERP faculty
Lecturer	Yes	Yes	Use to identify lecturer faculty
GA	possible	no	Do not use unless instructed to by your college
TT Faculty	Yes	Yes	Use to identify tenure & tenured-track faculty
TA	Yes	No	Use to identify Teaching Associates; should not have assigned time. For an unknown TA, list "TA" as the instructor of record because leaving the instructor field blank defaults to 'staff' designation.
Volunteer	Yes	Yes	Use to identify Faculty and lecturers whose volunteering has been approved by the Dean.

Each row has only one faculty type associated to it. For TT Faculty who are also Chairs, enter the faculty twice with one faculty type per row. All other faculty should only have one faculty type.

Note: TT Faculty and Chair are the only combination of faculty types allowed. Any other combination will generated an error message upon attempt to save and you will not be allowed to save your changes until you correct the error.

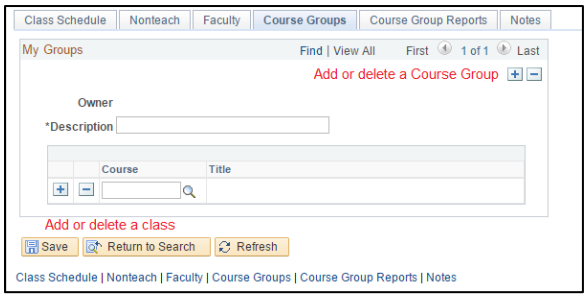
COURSE GROUPS

Course Groups allows you to create custom groups of courses and view for schedule conflicts among the group. The two reports – View Classes and View Gird, may be used to generate a printable schedule of courses in other department which may be used as a way for interdisciplinary programs to show all courses offered per semester.

Once Course Groups are created, they exist – term to term, until the owner or an Admin deletes them. You will be listed on each group you create as the owner and being the owner only you or and Admin can delete or edit the group. Others may view your groups and may generate reports on them, but are not allowed to edit or delete.

From the Course Groups tab, you can create as many course groups as needed.

Fig. 22 Course Groups Tab



Follow these steps to create a Course Group:

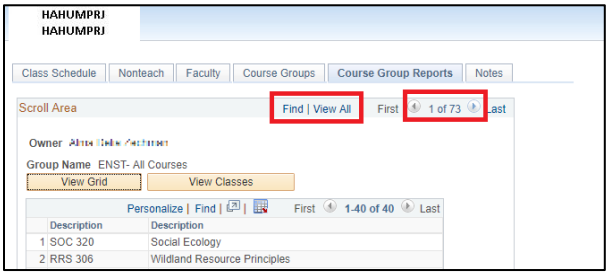
1. Enter in a description for your group
2. Enter in the Course number, press tab and the Title will populate (or use the Look-Up)
3. Click on the "+" to add the next class, repeat step 2
4. Repeat steps 2 and 3 until you have added all of the classes that you wish to create your group
5. Click Save, to save the group
6. Click on the "+" in the upper right hand corner to create another group

Note: If a Course Group already exists, start with step 6

To view an existing Course Group, click on the Course Group Reports tab. Here you can view all existing Course Groups, as well as who owns each one. Only the owner or an Admin can edit or delete a Course Group. Course group reports are listed in order of logged on user, then alphabetically by user name.

You can arrow through the Course Groups, or you can view several or all of them on one page.

Fig. 23 Course Groups Navigation



COURSE GROUPS REPORTS

To view the Course Group Reports, click on View Grid (to see the group classes in a grid format) or click on View Classes (to see the classes within the group in list view). The reports will display in pdf format, which you can print as needed.

NOTES

The Notes tab is where you can write notes about planning a term – to yourself or to others who have Read/Write access to your department in SPA.

To use, just type your notes into the Notes box and click on Save. The notes will be saved along with the date and time they were written and who wrote them. Just like in Course Groups, you can choose to arrow through all of the notes, or you can choose to view several or all notes on one page and scroll down through them.

Notes are term specific and do not roll forward to the next term. Notes in a previous term can be viewed as needed, even if a term is locked.

EXCHANGING DATA WITH PEOPLESOFT

Once the planning for a term is complete and approved, that information is now ready to become part of PeopleSoft, the official system of record. The process is a "truing-up" of the data in SPA with the data in PeopleSoft by moving data from SPA to PeopleSoft and then syncing back data from PeopleSoft to SPA.

The goal is that come census, both systems contain the same data, signifying that the plan information has been successfully transferred to PeopleSoft and that SPA now contains official data that is a good baseline for that term when planning for the next academic year.

The task of transferring the plan data to PeopleSoft is achieved via both direct re-entry into PeopleSoft and electronic transfer.

RULES TO PUSH DATA TO PEOPLESOFT

Per the Class Schedule Production Calendar published by the Office of the Registrar, after Departments have completed their plans for a term in SPA – which includes the Dean's approval of the plan, the Departments need to transfer that data to PeopleSoft.

e.g. Class Schedule Production Calendar excerpt:

Departments enter Spring 2018 class schedule into PeopleSoft	Class Schedule ASCs
Deadline to enter Spring 2018 courses to PeopleSoft	Class Schedule ASCs

For the following plan data, ASCs can select and "push" rows of data from the Class Schedule to the Maintain Schedule of Classes pages in PeopleSoft for most types of classes.

- Days
- Hour
- Minutes
- Enrollment Cap
- Associated Class Value (for new sections only, this value is set to match the new section number)

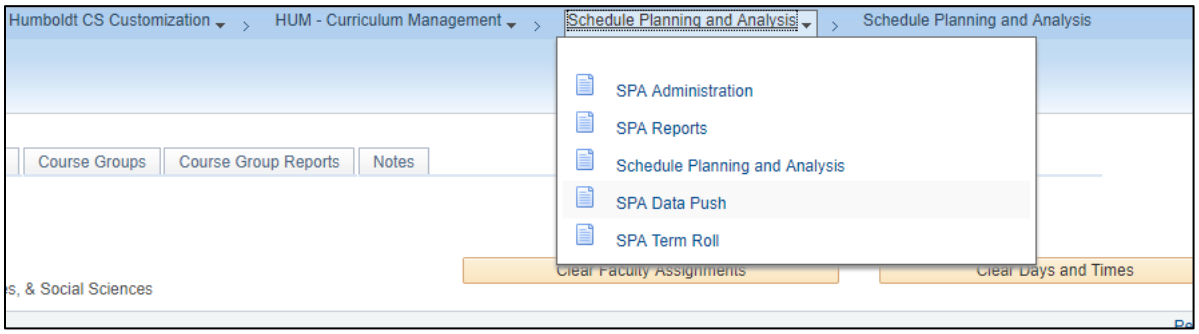
Here are the rules for pushing data.

1. Data should be pushed only at the times indicated on the Class Schedule Production Calendar – as shown above
2. A class must have at least one section created in Maintain Schedule of Classes before a new section can be added
3. Once a row of plan data has been pushed to PeopleSoft, that row is "locked" in that it cannot be pushed again without being unlocked by a SPA Admin – ***all fields except the meeting pattern fields remain editable for planning purposes***
4. Cross-Listed classes cannot be pushed to PeopleSoft
5. ASCs must set up a Run Control ID in the "SPA Data Push" module prior to pushing any data

HOW TO PUSH DATA TO PEOPLESOFT

Pushing data from SPA to PeopleSoft is done via the SPA Data Push module.

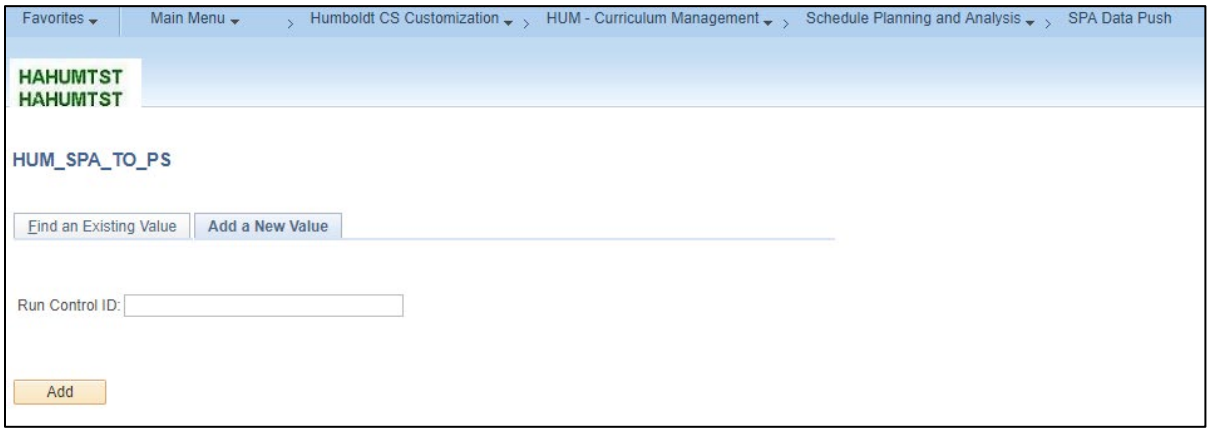
Fig.24 SPA Data Push



To use the SPA Data Push process, you must first set up a Run Control ID that you will use whenever pushing data from SPA to PeopleSoft. You only need to create one Run Control ID for pushing data.

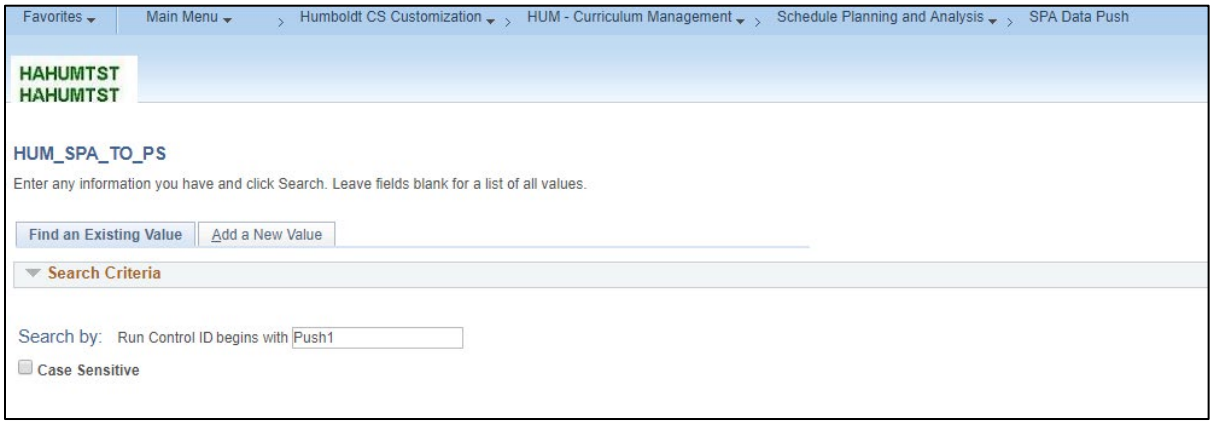
SET UP A RUN CONTROL ID

Fig.25 RunControlID_1



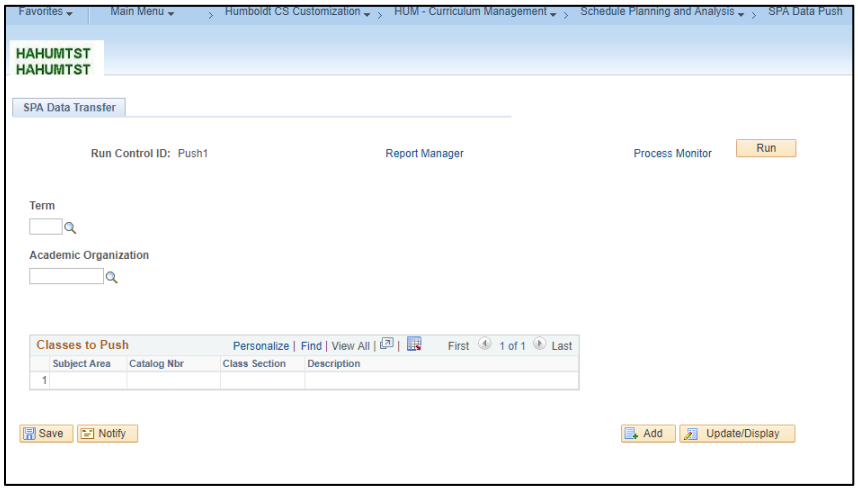
Click on "Add a New Value" tab. Enter a name for your Run Control ID and click on the "Add" button.

Fig.26 Run Control ID_2



Enter a term and an academic organization – suggested to start with your academic organization you use the most (you can change these values as needed) and click on Save.

Fig.27 Run Control ID Parameters

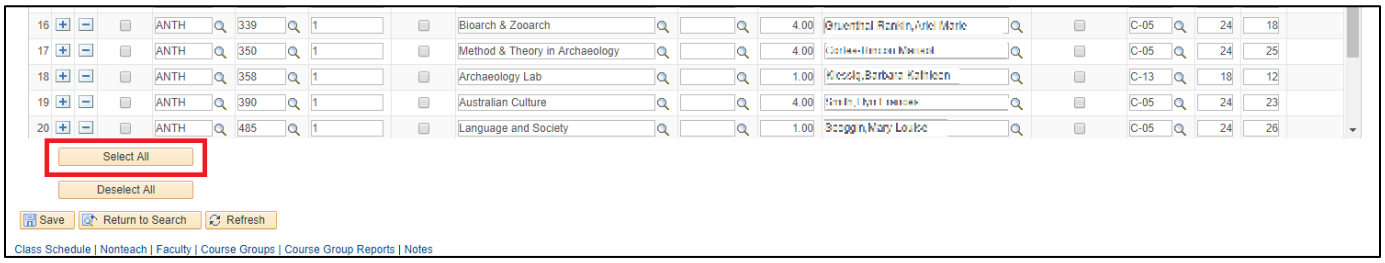


Your Run Control ID is now set.

SELECT CLASSES TO PUSH

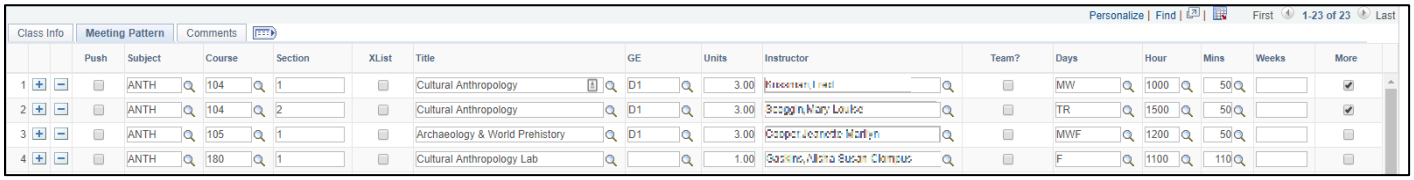
Once the plan is complete and ready to be transferred to PeopleSoft, on the Class Schedule, you can select all rows in the plan and transfer the meeting pattern and enrollment cap data for all classes to PeopleSoft for existing and new sections[1] by clicking on Select All and then Save. This includes additional meeting patterns under the "More" tab. You can also "Deselect" all rows as needed.

Fig.28 Select All



You can also select one to many rows of data that you want to push to PeopleSoft by clicking on the checkbox under the "push" column. This method of selecting data to push is generally used if any changes are required after the entire plan has been pushed to PeopleSoft.

Fig.29 Select Rows

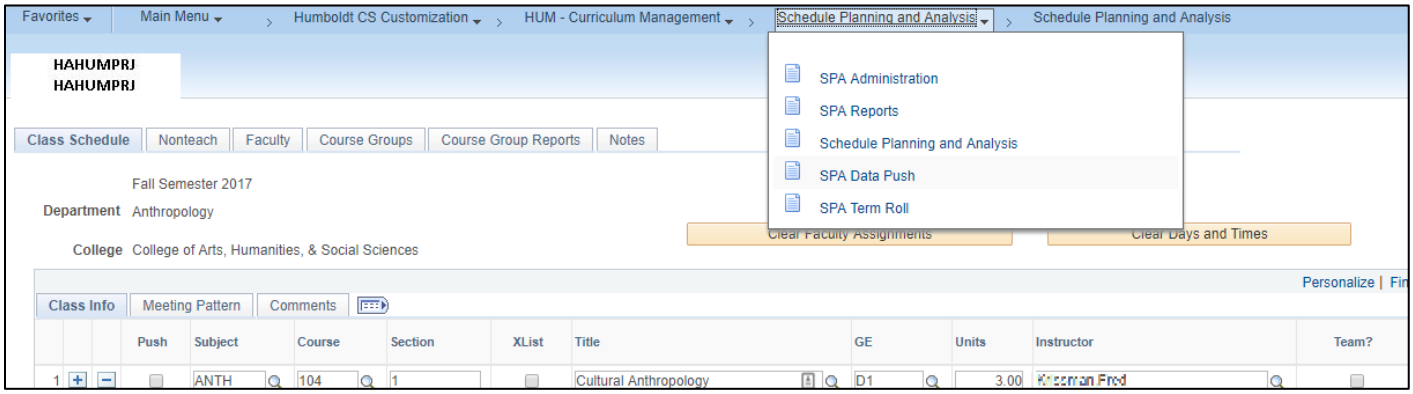


[1] **A class must have at least one section in place in PeopleSoft before a new one can be added.**

PUSH DATA

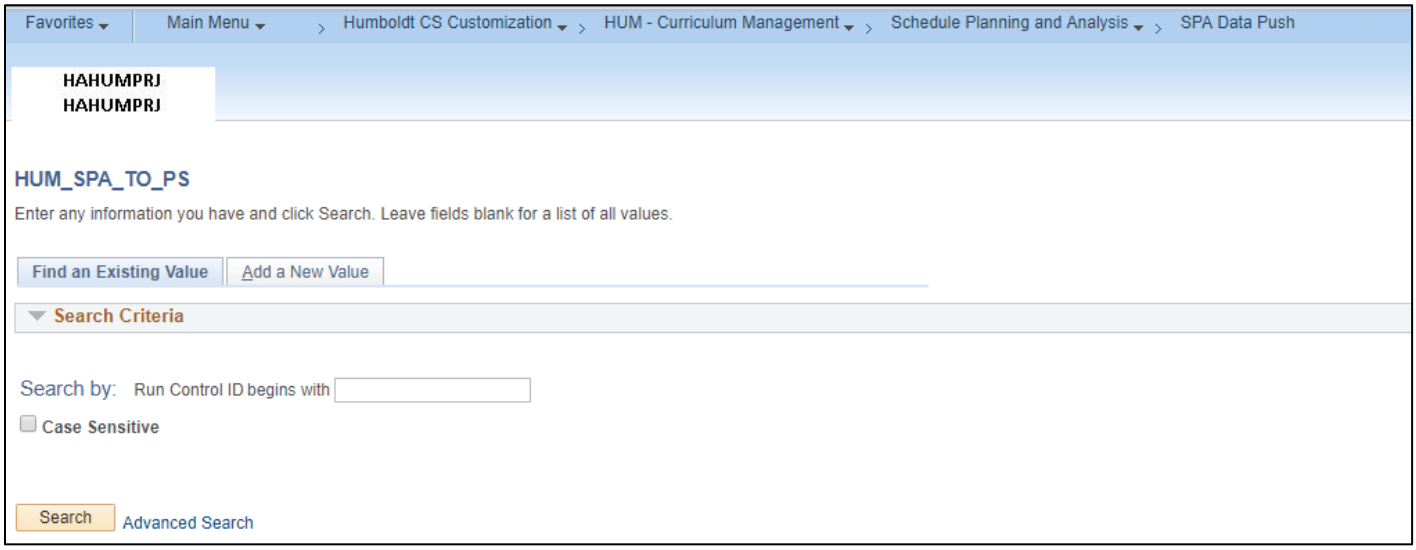
To push data from the Class Schedule to PeopleSoft, you will use the Data Push module.

Fig.30 Data Push



Once the Data Push module is opened, enter your Run Control ID and click Search.

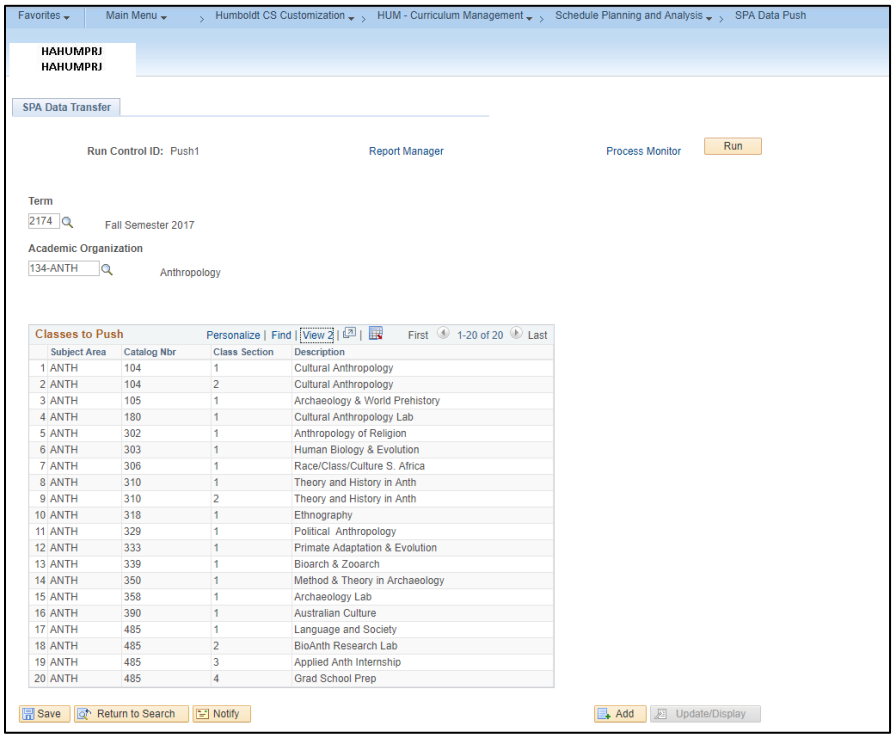
Fig.31 Enter Run Control ID



Ensure that the Term and the Academic Organization are the same as the Class Schedule from which you are working. If different from the Term and Academic Organization selected when the Run Control ID was created, change those values to match your Class Schedule Term and Academic Organization and click Save.

The list of selected classes and sections will display. Click Run to push the meeting patterns and enrollment cap for these classes to PeopleSoft.

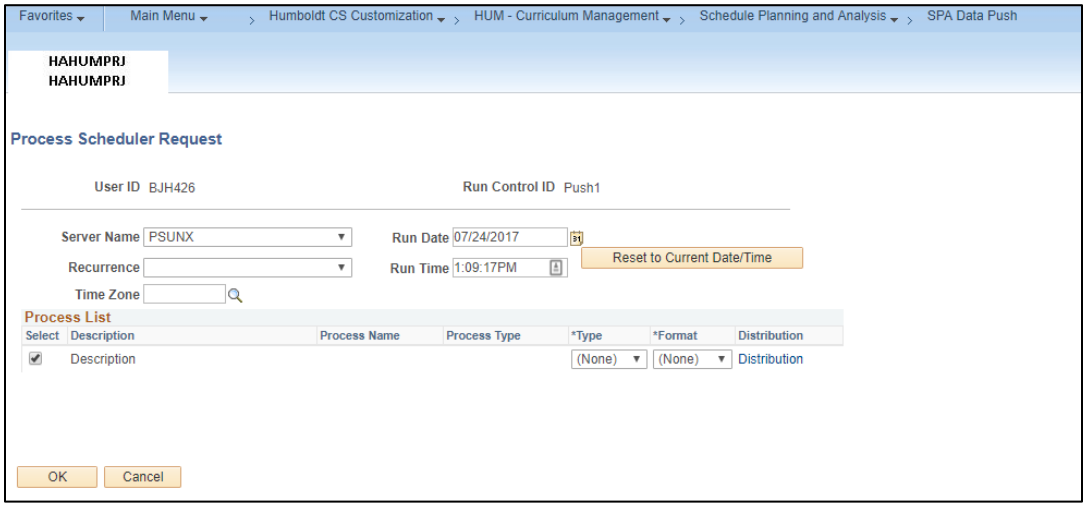
Fig.32 List of Selected Classes



	Subject Area	Catalog Nbr	Class Section	Description
1	ANTH	104	1	Cultural Anthropology
2	ANTH	104	2	Cultural Anthropology
3	ANTH	105	1	Archaeology & World Prehistory
4	ANTH	180	1	Cultural Anthropology Lab
5	ANTH	302	1	Anthropology of Religion
6	ANTH	303	1	Human Biology & Evolution
7	ANTH	306	1	Race/Class/Culture S. Africa
8	ANTH	310	1	Theory and History in Anth
9	ANTH	310	2	Theory and History in Anth
10	ANTH	318	1	Ethnography
11	ANTH	329	1	Political Anthropology
12	ANTH	333	1	Primate Adaptation & Evolution
13	ANTH	339	1	Bioarch & Zooarch
14	ANTH	350	1	Method & Theory in Archaeology
15	ANTH	358	1	Archaeology Lab
16	ANTH	390	1	Australian Culture
17	ANTH	485	1	Language and Society
18	ANTH	485	2	BioAnth Research Lab
19	ANTH	485	3	Applied Anth Internship
20	ANTH	485	4	Grad School Prep

Next you will see the Process Scheduler page. Verify that the Server Name is PSUNX. If not, click on the drop down and select PSUNX.

Fig.33 Process Scheduler



RULES TO PUSH DATA TO SPA

This process is intended to sync SPA with changes made in PeopleSoft and is almost entirely automatic. This allows planners to see in SPA changes they made to the same data in PeopleSoft.

The end goal is that at the point of Census, SPA and PeopleSoft data match, that is, there is a relatively stable and accurate picture of the classes offered and the faculty assignments for that term that can be used as a starting for planning the next term. Here is how it all works.

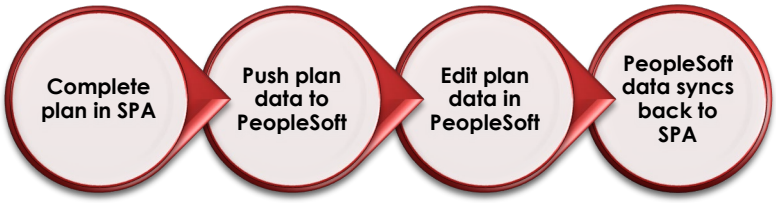
SYNCING PUSHED DATA

Once a row of plan data has been electronically pushed to PeopleSoft and that row is locked, any changes made in PeopleSoft to the following fields will be synced back to SPA once every 24 hours.

- Days
- Hour
- Minutes
- GE
- Units
- Mode

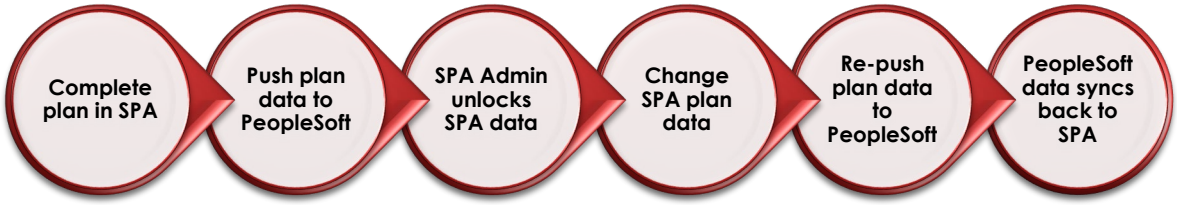
This provides the option of making changes to pushed data in PeopleSoft and having that single action update SPA as well, which accounts for most of the smaller changes made after a plan is deemed complete.

Fig.34 Push and sync



When implementing more extensive changes to plan data that has been electronically pushed to PeopleSoft that requires additional planning, contact your Budget Analyst who will use their SPA Admin permissions to unlock your data so that you can create additional "what-if" scenarios, make final changes and re-push the revised plan data back to SPA.

Fig.35 Unlock, re-plan, push, and sync



SYNCING OTHER DATA

There are two other pieces of information that is synced from PeopleSoft to SPA, actual enrollment numbers and faculty information.

ACTUAL ENROLLMENT

As students enroll in classes, the number of students enrolled in a class/section is aggregated in PeopleSoft. The number of actual enrollments is synced back to SPA for comparison in specified reports with key calculated values based on estimated enrollment numbers.

Once a class is pushed to PS, these calculated values are now based on actual enrollment numbers, providing college leadership with insight as to how effective their planning was for that term.

FACULTY INFORMATION

Even though we users identify faculty by names, at the heart of the SPA and PeopleSoft systems, faculty are identified by their employee identification numbers (more commonly referred to as "empl id"). To the systems, names are just descriptive information about the empl id.

So if a faculty member is entered into SPA Faculty Table as:

Jones,Bob 123456789

But in PeopleSoft Bob is entered as:

Jones,Robert 123456789

The sync process will correct the SPA name Jones,Bob to Jones,Robert on all rows that contain Jones,Bob in its efforts to true-up SPA to the official data in PeopleSoft.

However, if a faculty member is entered into SPA Faculty Table as:

Smith,Jane ANTH-10

But in PeopleSoft, Jane is entered as:

Smith,Jane 345678911

The sync process will <u>not make any changes to Smith,Jane in SPA</u>. Instead, all rows of data in SPA containing Smith,Jane on them will display on the SPA-CMS Differences report as a reminder that Smith, Jane's employment identification number needs to be updated with the correct value. Once the empl id is corrected, Smith,Jane will no longer display on the SPA-CMS Differences report.

In summary, if the empl ids match, the sync process will make any necessary changes to the faculty name. If the empl ids do not match, no changes are made in SPA, but the corresponding assignments will display on the SPA-CMS report.

Be sure to continue to use the placeholder empl id for faculty placeholders in SPA until you are ready to name the actual faculty member so that your placeholder data is not changed during the sync process.

SPA DATA IN PEOPLESOFT

The current push features will move specified SPA data to specified tabs and fields in the Maintain Schedule of Classes section in PeopleSoft. The two main scenarios where data is pushed to PeopleSoft are:

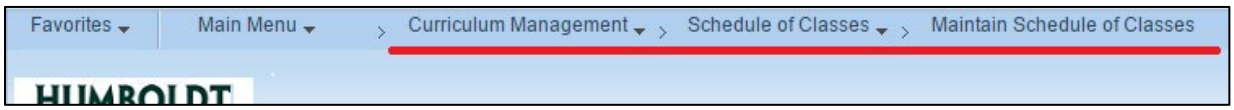
1. Modify a meeting pattern on an existing section
2. Add a section[2] with one or more meeting patterns

These two scenarios include meeting patterns for the days of the week and weekend, TBA, and ONL as well as the additional meeting pattern instances under the SPA "More" checkbox.

MODIFY MEETING PATTERN ON AN EXISTING SECTION

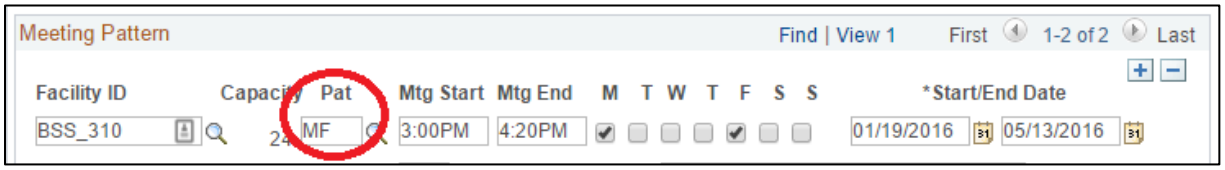
When you modify the meeting pattern on an existing section and push that data to PeopleSoft, that meeting pattern changes are pushed to the Meetings tab for that Course in Maintain Schedule of Classes.

Fig.36 Maintain Schedule of Classes



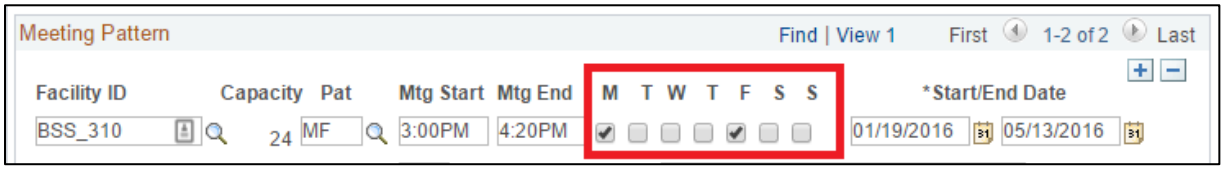
The meeting pattern selected in the SPA Days field will be displayed in the PeopleSoft "Pat" field.

Fig.37 Days to "Pat" field



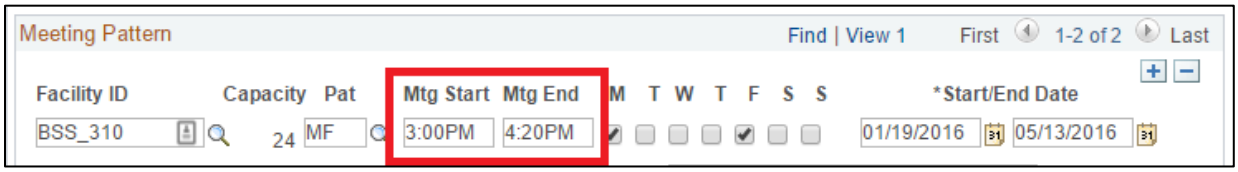
The days of the week are check as well.

Fig.38 Days of the week checked



The start time entered in the SPA Hour field and the minutes entered in the SPA Min field are used to calculate and populate the PeopleSoft Mtg Start and Mtg End times.

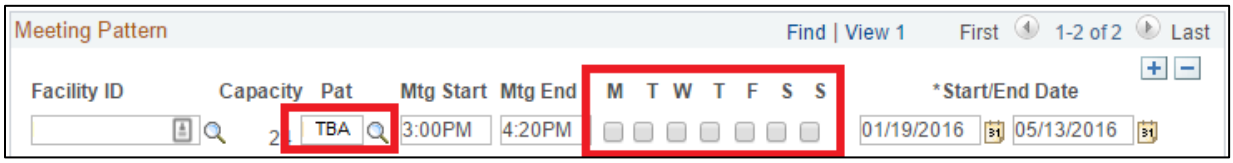
Fig.39 Start and End times



[2] class must have at least one section existing in PeopleSoft

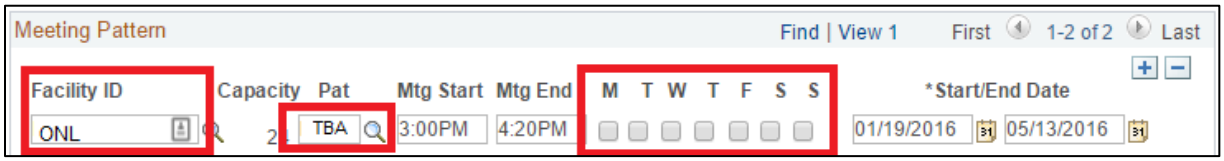
If TBA is entered in the SPA Days field, TBA will display in the PeopleSoft "Pat" field and no days of the week will be checked.

Fig.40 TBA



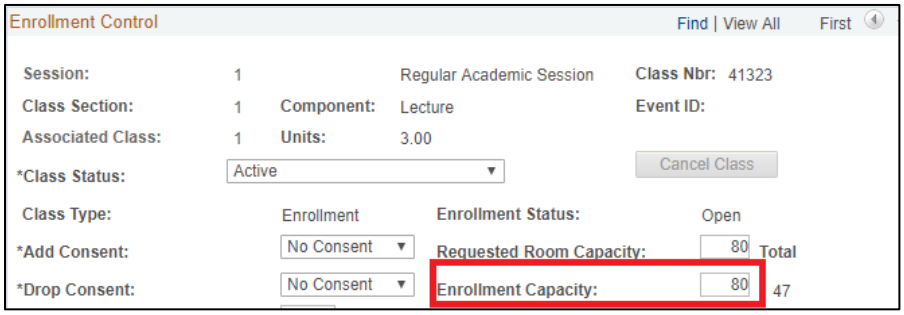
If ONL is entered in the SPA Days field, in PeopleSoft, ONL will display in the "Facility ID" field, TBA will display in the "Pat" field and no days of the week will be checked.

Fig.41 ONL



The other item that is updated, is the Enrollment Capacity field on the Enrollment Cntrl tab.

Fig. 42 Enrollment Cap

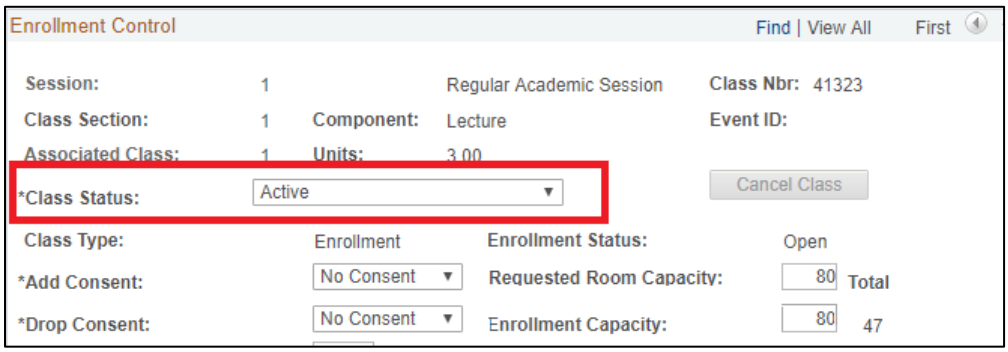


ADD A SECTION WITH ONE OR MORE MEETING PATTERNS

In this scenario, in addition to pushing data to the fields described in "MODIFY A MEETING PATTERN OF AN EXISTING SECTION", two other values are updated – the new section status and the Associated Class value.

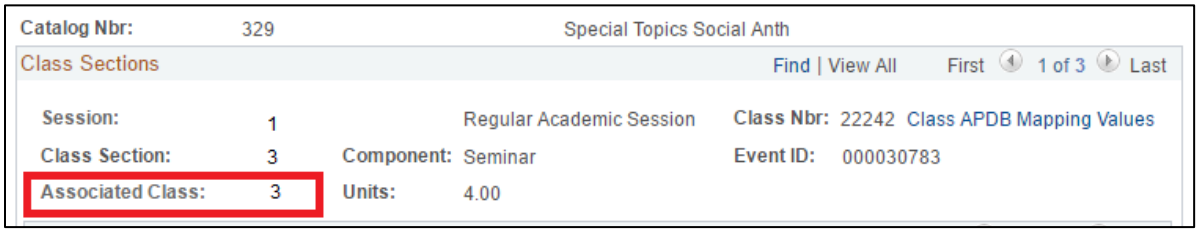
In the Maintain Schedule Classes section in PeopleSoft, under the Enrollment Ctrl tab for the course, the Class Status set to "Active."

Fig.43 Active Status



Under the Meetings tab, the Associated Class value is set to the new section number. For instance, if the class has 2 sections in SPA and PeopleSoft, and you add section 3, the Associated Class value for the added 3rd section is 3.

Fig. 44 Set Associated Class



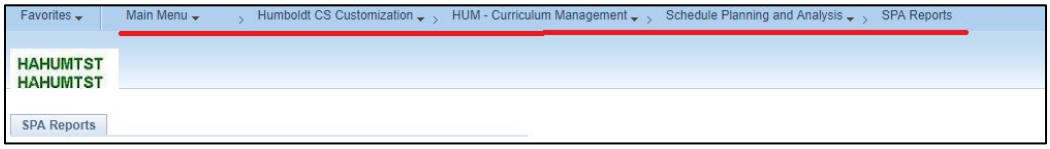
REPORTS

SPA contains several canned reports designed to provide decision-making insight into the SPA data – for ASCs who are executing the planning activities, Budget Analysts who use SPA data to understand the impact of the planning on the budget, and for Deans who are drivers and final approvers of the plan. Additionally, there are a few reports provided to or accessed by other campus members, such as the Provost Office and Academic Personnel Services.

ACCESSING REPORTS

SPA has a reports module from which all SPA based reports can be run. To protect sensitive data, reports with faculty and salary information, are only available to Budget Analysts (SPA Admins), reports with faculty names are only available to users with Write access to an academic organization. Users with Read access can generate all reports that do not contain faculty or salary information.

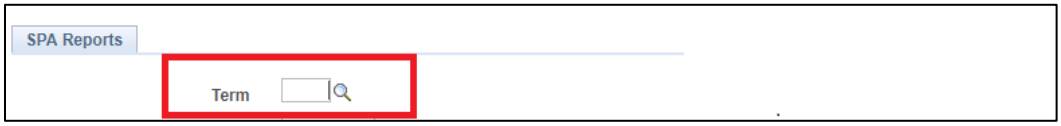
Fig. 45 Reports Page



REPORT PARAMETERS

To run a report, enter the Term that you want the report to cover.

Fig. 46 Term



Next, select the academic organization <u>or</u> the college that you want the report to cover. Selecting an academic organization will produce a department level report, while selecting a college will produce a report on all departments within a college.

Fig. 47 Academic Org

For all reports, except one, these are all the parameters you will need to run a report. But, if you wish to generate the Changes Since Snapshot report, you will also need to select the Snapshot Date.

Fig. 48 Changes Since Shanpshot Date

ASSIGNED TIME APPROVAL FORM

Assigned Time Approval Form is for reporting assigned time to Academic Personnel Services. This report contains only assigned time assignments with a populated release code field; it does not include collateral duties or leave.

Fig. 49 Assigned Time Approval Form

Assigned Time Approval Form

Fall Semester 2017 — Department of Anthropology

HSU ID	Faculty	Type	Rel Cod	AT Code Description	Funding	WTUs	Description	Notes	CD	TF	PS	Rev
010021775	Cooper,Jeanette Marilyn	LCT	15	Non-Traditional Instruction	College	1.00	AT - ANTH 482	ANTH 482 C-78 MOU				
010051272	Cortes-Rincon,Marisol	TTF	22	Instructional Experimentation	College	4.00	assigned time - CRF	MA Development and Arch Review				
010051272	Cortes-Rincon,Marisol	CHR	IAF	Department Chair, AY	College	6.00	chair duties					
934468750	Gaskins,Alisha Susan Clompus	LCT	11	75-96 students	College	1.00	excess Enroll ANTH 303 - sec 1					
939804938	Klessig,Barbara Kathleen	LCT	23	Instructional-Related Services	College	1.00	assigned time - Arch Lab					
010024219	Ramsier,Marissa Ann	TTF	OSF	Teaching (Non-General Fund)	Reimbursed Activity	3.00	AT- teaching ANTH 673 for CEEE					
932225886	Robertson,Rebecca E.	LCT	IAF	Univ, Other (Prod Mgr, etc)	University	1.00	AT - Exceptional Service to St					
932225886	Robertson,Rebecca E.	LCT	OSF	Teaching (Non-General Fund)	Reimbursed Activity	3.00	AT - covering 3 WTUs CEEE	MA Grad Coord (3)				
010013845	Scoggin,Mary Louise	TTF	OSF	Teaching (Non-General Fund)	Reimbursed Activity	3.00	AT- teaching ANTH 672 for CEEE					
010014404	Smith,Llyn Frances	FRP	OSF	Teaching (Non-General Fund)	Reimbursed Activity	3.00	AT - teaching ANTH 679 for CEE					
010014404	Smith,Llyn Frances	FRP	OSF	Teaching (Non-General Fund)	Reimbursed Activity	2.00	leave - teaching ANTH 678 for	ANTH 678 for Fall only				

Recommended by Department Chair:_____ Date: _____

Approved by College Dean: _____ Date: _____

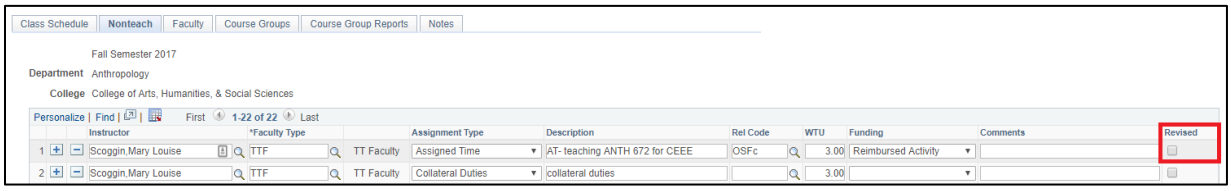
APS Form 121: Assigned Time Form

Distribution: Department forwards signed original to College. After review and Dean's signature, College forwards electronically to academicpersonnel@humboldt.edu and to the Department. College retains original for records.

7.31.2017 — 1 of 1

Sometimes this form is submitted to APS more than once. The last column to the right is titled Rev, if there is a checkbox in this field that tells APS that this row of data on the form is a revision of the originally submitted data. To check a row as a revision, prior to running the report, navigate to the Non Teach tab and check the "Revised" check box.

Fig. 50 Revised check box



ASSIGNED TIME REPORT

The Assigned Time report contains all assigned time, collateral duties, and leaves. It is used by Budget Analysts to view non-teaching workload or commitments in a term. Of particular use to all, is the ability to see and account for not only assigned time duties, but also collateral duties, and leaves, sabbatical non-teaching terms, FERP non-teaching terms, and other activity which has 0 WTUs.

Fig. 51 Assigned Time Report

Assigned Time Report

Fall Semester 2017 — Anthropology

Instructor	Type	Description	WTUs	Notes
GA,1	Assigned Time	Arch Lab supervision	5.70	5.64 WTU rounded up for Payroll per APS - only for Fall check
Scoggin,Mary Louise	Assigned Time	AT- teaching ANTH 672 for CEEE	3.00	
Chavez Arguelles, Claudia	Collateral Duties	collateral duties	3.00	
Chavez Arguelles, Claudia	Assigned Time	AT new course release time	4.00	F17 term 1 of 4
Klessig,Barbara Kathleen	Assigned Time	assigned time - Arch Lab	1.00	
Gaskins,Alisha Susan Clompus	Assigned Time	excess Enroll ANTH 303 - sec 1	1.00	
Robertson,Rebecca E.	Assigned Time	AT - covering 3 WTUs CEEE	3.00	MA Grad Coord (3)
Robertson,Rebecca E.	Assigned Time	AT - Exceptional Service to St	1.00	
Cortes-Rincon,Marisol	Collateral Duties	collateral duties	1.70	
Cortes-Rincon,Marisol	Assigned Time	assigned time - CRF	4.00	MA Development and Arch Review
Cortes-Rincon,Marisol	Assigned Time	chair duties	6.00	
Ramsier,Marissa Ann	Collateral Duties	collateral duties	3.00	
Ramsier,Marissa Ann	Assigned Time	AT- teaching ANTH 673 for CEEE	3.00	
Ramsier,Marissa Ann		assigned time	.00	
Cooper,Jeanette Marilyn	Assigned Time	AT - ANTH 482	1.00	ANTH 482 C-78 MOU
Smith,Llyn Frances	Collateral Duties	collateral duties	3.00	
Smith,Llyn Frances	Assigned Time	leave - teaching ANTH 678 for	2.00	ANTH 678 for Fall only
Smith,Llyn Frances	Assigned Time	AT - teaching ANTH 679 for CEE	3.00	
Scoggin,Mary Louise	Leave	leave - teaching INTL 220	.00	teaching course for INTL 220 - 3 unit course
Scoggin,Mary Louise	Collateral Duties	collateral duties	3.00	
Staff,1	Assigned Time	assigned time - CRF	1.70	Historical Documents Project
Π		Anthropology Total WTUs	53.10	

8.1.2017 (not a final schedule; not an offer of employment) 1 of 1

CHANGES SINCE LAST YEAR

The Changes Since Last Year report provides a list of changes that were made in the previous term as compared to the current term as of the report run date. So, if on July 6, 2017, you run the report while in the Fall 2017 term, the report will look at the Fall 2016 term Class Schedule values as they exist on July 6, 2017, compare them to the Fall 2017 Class Schedule values as of July 6, 2017 and display the differences on the report.

For example, a class has 2 sections in Fall 2016. Section 1 has a 45 Cap and a 45 Estimate enrollment. Section 2 has a 20 Cap and a 25 Estimate enrollment. Combining the 2 sections, that a total of 65 Cap and 70 Estimate.

Fall 2016 Class Schedule

Course	Section	Title	Units	GE	Mode	Est	Cap
ANTH 103	01	Biological Anthropology	1	B2	C-16	45	45
ANTH 103	02	Biological Anthropology	1	B2	C-16	25	20

Now in the Fall 2017, the 2nd section has been deleted and there is only the Section 1 remaining. The class in question would be displayed on the report with -1 in the Sections column, to indicate that there is 1 less section and the Cap column would contain a -20 and the Estimate column would contain a -25 to indicate the reduction in the overall Cap and Estimated enrollment for this class.

Fall 2017 Report data

Course	Title	Units	GE	C-class	Sections	Cap	Est
ANTH 103	Biological Anthropology	1	B2	C-16	-1	-20	-25

Fig. 52 Changes Since Last Year

Changes Since Last Year

Fall 2017

Anthropology

Course	Title	Units	GE	C-class	Added/Deleted Sections	Cap	Estimate
ANTH 103	Biological Anthropology	1	B2	C-16	2	45	45
ANTH 103	Biological Anthropology	2	B2	C-2	1	45	45
ANTH 104	Cultural Anthropology	3	D1	C-2	0	0	28
ANTH 105	Archaeology & World Prehistory	3	D1	C-3	0	0	9
ANTH 302	Anthropology of Religion	3	UDD,DCG	C-5	0	0	-12
ANTH 303	Human Biology & Evolution	3	UDB	C-2	2	160	160
ANTH 303	Human Adaptation & Evolution	3	UDB	C-2	-1	-45	-40
ANTH 306	Race/Class/Culture S. Africa	3	UDD,DCG	C-2	-1	-45	-40
ANTH 306	Ancient Mediterranean Cultures	3	UDD,DCG	C-2	1	45	44
ANTH 316	Anthropology and Development	4		C-2	1	24	25
ANTH 317	Women and Development	4		C-5	-1	-24	-18
				Anthropology Totals	4	200	214

Art

Course	Title	Units	GE	C-class	Added/Deleted Sections	Cap	Estimate
ART 104B	Ancient Art	3	C1	C-2	-1	-65	-61
ART 104I	20th Century Art	3	C1	C-2	0	0	8
ART 104J	Art in the United States	3	C1,DCGD	C-2	1	65	65
ART 105B	Fundamentals of Drawing	3	C1	C-7	0	0	2
ART 105C	2D Foundations	3	C1	C-7	0	0	5
				Art Totals	0	0	19
				Report Totals	4	200	233

8.1.2017

1 of 1

CLASS SCHEDULE GRID

This report provides a breakdown of classes scheduled by day usage and by time zone percentages, as well as percent of total classes that have been scheduled. It also provides a visual representation in grid format of the projected course schedule.

There are seven time zones as defined by the Course Schedule Working Group Recommendations. Peak Time is defined as class scheduled between 9:00 am and 2:00 pm. Any class scheduled outside of the Peak Time zones is considered Off Peak.

In determining zone usage, classes are rounded to the half hour for all calculations.

e.g.

> A 1.5 hour TTh class that started at 2 PM and ran all semester would count as 60 minutes * 15 weeks in the 1:00-3:00 zone and 30 minutes * 15 weeks in the 3-5 zone. If the class also included a 4 hour seminar on two Saturdays, 480 off-peak hours would be included in the total minutes divisor.

On-line classes contribute minutes to the off-peak total based on the K-factor and units. For hybrid classes, the number of scheduled hours are subtracted from the total K-factor hours to come up with the number of on-line hours.

The other data point that this report reflects is the GE Attributes with which classes are associated. This feature appears in the visual representation of the projected course schedule section. The classes that are associated with GE Attributes are highlighted using a color-coded legend that depicts the associated GE attribute.

Fig. 53 Class Schedule Grid

Class Schedule Grid*

Spring 2016

Off – Peak 23%	9m – 11am 22%	11am – 1pm 17%	1pm – 3pm 24%	3pm – 5pm 14%	Friday 19%	Tues & Thur 27%	Scheduled 100%

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7 AM							
8 AM						ANTH 485 (3)...	
9 AM		ANTH 332 (1)...	ANTH 410 (2)...	ANTH 332 (1)...	ANTH 410 (2)	...ANTH 485 (3)	
10 AM	ANTH 306 (2) ANTH 390 (1)	...ANTH 332 (1)	ANTH 306 (2) ANTH 390 (1) ...ANTH 410 (2)	...ANTH 332 (1)	ANTH 306 (2) ANTH 390 (1)	...ANTH 485 (3)	
11 AM	ANTH 339 (1)...	ANTH 318 (1)...	ANTH 339 (1)...		ANTH 485 (2)		
12 PM	ANTH 104 (1) ...ANTH 339 (1) ANTH 485 (1)	...ANTH 318 (1)	ANTH 104 (1) ...ANTH 339 (1)				
1 PM	ANTH 105 (1) ANTH 341 (1)...	ANTH 303 (1)... ANTH 374 (1)...	ANTH 105 (1)	ANTH 303 (1)... ANTH 374 (1)...	ANTH 105 (1) ANTH 341 (1)...		
2 PM	...ANTH 341 (1)	...ANTH 303 (1) ...ANTH 374 (1)	ANTH 357 (1)...	...ANTH 303 (1) ...ANTH 374 (2)	...ANTH 341 (1)		
3 PM	ANTH 329 (1)...	ANTH 410 (1)...	...ANTH 357 (1)	ANTH 410 (1)	ANTH 329 (1)...		
4 PM	...ANTH 329 (1)	...ANTH 410 (1)	...ANTH 357 (1)		...ANTH 329 (1)		
5 PM			ANTH 104 (2)...		ANTH 485 (3)...		
6 PM			...ANTH 104 (2)		...ANTH 485 (3)		
7 PM			ANTH 387 (1)		...ANTH 485 (3)		
8 PM							

GE A | GE B | GE C | GE D | GE E | INS | CWT | DCG

8.1.2017 *not an offer of employment 1 of 1

CROSS-LISTED AND DUAL-LEVEL CLASSES

This report provides a list of courses that are cross-listed with each other. For each class, the primary instructor, C-Classification (mode), estimated enrollment, cap enrollment, units (student credit units), and scheduling information is displayed.

A cross-listed course is a single course that is offered in two or more academic subject areas with the same title, credits, mode of instruction, and description. Cross-listed courses are offered in the same room at the same time.

A dual-level course is very similar to a cross-listed course except for the mode of instruction. When the mode of instruction is different for the classes offered at the same time in the same room, these are dual-level courses.

Fig. 54 Cross-Dual Listed Classes

Cross-listed and Dual-level Classes*

Fall 2016 Anthropology

Course	Title	Primary Instructor	C - class	Est.	Cap	Units	Days and Times
ANTH 235 (1) COMM 235 (1) CRGS 235 (1) PSCI 235 (1) SOC 2335 (1)	Act to End Sexualized Violence	Berry Kimberly Schurer, Maxwell Berry, Kimberly Berry, KL Schurer, MD	C-1 C-1 C-1 C-1 C-1	1 12 22 5 15	15 100 50 15 100	1 1 1 1 1	F 17:00-19:50 (+) F 17:00-19:50 (+) F 17:00-19:50 (+)
ANTH 315 (1) WS 315 (1)	Sex, Gender, & Globalization	Berry, Kimberly Berry, Kimberly	C-3 C-3	10 14	10 20	4 4	TR 15:00-16:50
ANTH 317 (1) WS 317 (1)	Women and Development	New Position	C-5 C-5	24 5	24 7	4 4	TR 09:00-10:20 (+)

8.1.2017 *(planning purposes only, not an offer of employment) 1 of 1

FACULTY LOAD (TERM)

The Faculty Load (Term) report provides a term-based view of the allocated workload that has been assigned to each instructor within a department. It includes assignments from both the Class Schedule and the Non Teach tab.

Fig. 55 Faculty Load

Faculty Load (Term)

Fall 2017 Anthropology

Faculty	Description of Assignment	Release Code	Funding	WTUs	FTEF	Notes
Chavez, Arguelles, Claudia						
TT Faculty	ANTH 104 Cultural Anthropology (01)			3.00	0.20	
TT Faculty	ANTH 316 Anthropology and Development (01)			4.00	0.27	
TT Faculty	ANTH 485 Grad School Prep (03)			1.00	0.07	
TT Faculty	Assigned Time –TA new course release time	12	College	4.00	0.27	F17 term 1 of 4
TT Faculty	Collateral Duties – collateral duties			3.00	0.20	
	Chavez, Arguelles, Claudia	Totals		15.00	1.01	
Cooper, Jeanette Marilyn						
Lecturer	ANTH 105 Archaeology & World Prehistory (01)			3.00	0.00	
Lecturer	ANTH 306 Ancient Mediterranean Cultures (01)			4.00	0.20	
Lecturer	ANTH 482 Anthropology Internship (01)			0.00	0.20	
Lecturer	Assigned Time - AT - ANTH 482	15	College	1.00	0.07	ANTH 482 C-78 MOU
	Cooper, Jeanette Marilyn	Totals		7.00	0.47	
Cortes-Rincon,Marisol						
TT Faculty	ANTH 353 Archaeology of Warfare (01)			4.00	0.20	
TT Faculty	Assigned Time - assigned time - CRF	22	College	4.00	0.27	
Chair	Assigned Time - chair duties	IAFa	College	1.70	0.27	MA Development and Arch Review
TT Faculty	Collateral Duties - collateral duties			6.00	0.07	
	Cortes-Rincon,Marisol	Totals		15.70	1.05	
GA,1						
GA	Assigned Time - Arch Lab supervision	23	College	5.70	0.38	5.64 WTU rounded up for Payrol
	Cooper, Jeanette Marilyn	Totals		5.70	0.38	

8.2.2017 *planning purposes only, not an offer of employment 1 of 4

FACULTY LOAD (YEAR)

The Faculty Load (Year) report is primarily used during planning as a visual check of faculty assignments to dates, i.e. to allow you to check your work against a target to see where you are in meeting that target.

Fig. 56 Faculty Load (Year)

Faculty Load (Year)*

2017-18

Anthropology

Faculty	Type	Fall WTU	Spring WTU	Annual WTU	Annual FTEF
Chavez Arguelles, Claudia	TT Faculty	15.00	8.00	23.00	0.76
Cooper,Jeanette Marilyn	Lecturer	7.00	1.00	8.00	0.26
Cortes-Rincon,Marisol	Chair	0.00	1.70	1.70	0.05
Cortes-Rincon,Marisol	TT Faculty	9.70	4.00	13.70	0.45
Gaskins,Alisha Susan Clompus	Lecturer	8.30	1.00	9.30	0.31
Klessig,Barbara Kathleen	Lecturer	6.30	1.00	7.30	0.24
Patino,May Rose	Lecturer	3.00	0.00	3.00	0.10
Ramsier,Marissa Ann	TT Faculty	11.00	3.00	14.00	0.46
Robertson,Rebecca E.	Lecturer	12.00	0.00	12.00	0.40
Schnurer,Maxwell D	Lecturer	0.00	0.00	0.00	0.00
Scoggin,Mary Louise	TT Faculty	8.00	3.00	11.00	0.36
Smith,Llyn Frances	FERP	10.00	0.00	10.00	0.33
Whatcott,Jessica Ann	Lecturer	0.00	0.00	0.00	0.00
Anthropology Totals		90.30	22.70	113.00	3.72

Art

Faculty	Type	Fall WTU	Spring WTU	Annual WTU	Annual FTEF
Alderson, Julia	TT Faculty	13.00	9.00	22.0	0.70
Atherton, Megan	Lecturer	11.70	11.70	23.4	0.80
Berke, Joanne	FERP	14.70	0.00	14.7	0.50
Carey, Ian	Lecturer	11.70	11.70	23.4	0.80
Cobb, Emily	TT Faculty	14.70	18.60	33.3	1.10
Conley, Nicole	Lecturer	9.00	0.00	9.0	0.30
Cooper, Jeanette	Lecturer	3.00	0.00	3.0	0.10
Fuglestad, Wendy	Lecturer	0.00	12.00	12.0	0.40
Fuglestad,W	Lecturer	12.00	0.00	12.0	0.40
Guerra, Brandice	TT Faculty	0.00	14.70	14.7	0.50
Hill, Nicole	TT Faculty	14.70	14.70	29.4	1.00
Hurst, Ryan	Lecturer	7.80	11.70	19.5	0.70
Madar, Heather	TT Faculty	14.80	15.80	30.6	1.00
Art Totals		127.10	119.90	247.00	8.30

FACULTY SCHEDULE GRID

The Faculty Schedule Grid displays each faculty member's course load on a weekly schedule grid, one page per faculty. If faculty prefer, they may cut the grid portion from the report and post it on their door.

Fig. 57 Faculty Schedule Grid

Faculty Schedule Grid*

Spring 2016

Jeannette Cooper

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7 AM							
8 AM							
9 AM							
10 AM	ANTH 306 (2)		ANTH 306 (2)		ANTH 306 (2)		
11 AM							
12 PM	ANTH 485 (1)						
1 PM	ANTH 105 (1)		ANTH 105 (1)		ANTH 105 (1)		
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							

8.9.2017 *not an offer of employment 1 of 1

GE DATA

The GE Data report displays remedial, GE, DCG, human integration, and institution requirements.

Fig. 58 GE Data

Fall 2016 GE and Remedial Data*

Course	Title	Section	GE Attribute	Est	Cap	Seats Avail	Comments
Area D							
SOC 104	Introduction to Sociology	10	D8	0	96	96	
SOC 104	Introduction to Sociology	20	D8	0	40	40	EOP
SOC 104	Introduction to Sociology	30	D8	0	96	96	
	D8 Total			0	232	232	
Area D Totals				0	232	232	
DCG							
SOC 316	Gender and Society	1	DCGD	0	19	19	
	DCGD Total			0	19	19	
DCG Totals				0	19	19	
UD Area D							
SOC 302	Forests & Culture	1	UDD	0	45	45	
SOC 303	Race & Inequality	10	UDD,DCGD	0	80	80	
SOC 306	The Changing Family	1	UDD,DCGD	0	78	78	
	UDD Total			0	78	78	
UD Area D Totals				0	78	78	

8.9.2017 (*planning purposes only, not an offer of employment) 1 of 1

ONLINE AND HYBRID CLASSES

This report provides a list of classes that fully online and those that are hybrid - online classes and some face to face classes.

Online (ONL) classes can be identified as those classes that only have 1 meeting pattern and that meeting pattern is ONL.

Hybrid classes can be identified as those classes that have more than 1 meeting pattern and at least one of the meeting patterns is ONL and at least one of the meeting patterns is a face to face pattern[3].

Fig. 59 Online and Hybrid Classes

Proposed Online and Hybrid Classes*

Fall 2017

Anthropology

Online

Course	X	Primary Instructor	T	Est.	Cap	Units	WTUs	FTES	Days	Start	Min	Comments
ANTH 104: Cultural Anthropology (2)		Robertson, Rebecca		80	80	3	3.00	16.00	ONL			online
ANTH 302: Anthropology of Religion (1)		Smith, Llyn		45	45	3	3.00	9.20	ONL			
ANTH 485: Language and Society (1)		Scoggin, Mary		26	24	1	1.00	1.70	ONL			

Hybrid

Course	X	Primary Instructor	T	Est.	Cap	Units	WTUs	FTES	Days	Start	Min	Comments
ANTH 104: Cultural Anthropology (1)		Chavez Arguelles, Claudia		42	45	3	3.00	8.40	MW	0900	50+	hybrid
ANTH 310: Theory and History in Anth(1)		Robertson, Rebecca		20	24	4	4.00	6.70	M	1500	80+	hybrid
ANTH 310: Theory and History in Anth (2)		Smith, Llyn		20	24	4	4.00	5.30	MW	1500	80+	hybrid
ANTH 318: Ethnography (1)		Robertson, Rebecca		25	24	4	4.00	6.70	M	1300	110+	hybrid
ANTH 390: Chinese Cultural Heritage (1)		Scoggin, Mary		24	24	4	4.00	6.400	TR	0900	80+	Hybrid
			Anthropology Totals				26.00	59.10				

Art

Online

Course	X	Primary Instructor	T	Est.	Cap	Units	WTUs	FTES	Days	Start	Min	Comments
ART 100: Global Perspectives in Art (1)		Vaughn, Casey		53	55	3	3.00	10.60	ONL	1700	170	
			Art Totals				3.00	10.60				

Communication

Online

Course	X	Primary Instructor	T	Est.	Cap	Units	WTUs	FTES	Days	Start	Min	Comments
COMM 100: Fund Speech Comm (11)		Reitzel, Armeda		24	25	3	3.00	4.80	ONL			
COMM 300: American Public Discourse (1)		Reitzel, Armeda		30	27	3	3.00	6.00	ONL			
			Communication Totals				6.00	10.00				

8.9.2017 *not a final schedule or an offer of employment 1 of 1

[3] Face to face meeting patterns are a combination of weekdays or weekend day (e.g. MWF or S)

PROPOSED CLASSES

Proposed Classes is a report of all courses, listed in course order, with instructor, and other information course-related. This report does not include any assigned time, chair duties, or collateral duties.

Fig. 60 Proposed Classes

Proposed Classes *

Spring 2016 — Religious Studies

Course		X	T	Est	Cap	Units	WTU	FTES	Days	Start	Min	Comments
RS 105 World Religions (1)	Ramiser,Marissa			150	150	3	3.00	30.00	TR	11:00	80	
RS 105 World Religions (2)	Ramiser,Marissa			120	120	3	3.00	24.00	ONL		0	
RS 323 Sacred Texts: Hindu Texts (1)	Patino,Mary			17	25	4	4.00	6.66	MW	5:00	110	
RS 342 Buddhism in India & Tibet (1)	Chavez Arguelles, Claudia			35	35	3	3.00	7.00	TR	1:00	80	
RS 361 Consumerism & EcoSpirituality (1)	Robertson Rebecca			35	35	3	3.00	7.00	TR	3:00	80	
						Anthropology Totals	16.00	74.66				

Course		X	T	Est	Cap	Units	WTU	FTES	Days	Start	Min	Comments
ART 100 Global Perspectives in Art (1)	Vaugh, Casey			55	55	3	3.00	11.00	ONL	11:00	170	
ART 103 Introduction to Art History (1)	Conley, Nicole			65	65	3	3.00	13.20	MWF	1:00	50	
ART 104H 19th Century Art (1)	Cooper, Jeanette			65	65	3	3.00	13.00	MW	10:00	110	
ART 104I 20th Century Art (3)	Conley, Nicole			65	65	3	3.00	13.00	TR	1:00	90	
ART 104J Art in the United States (1)	Carey, Ian			65	65	3	3.00	13.00	MWF	10:00	50	
						Art Totals	15.00	63.20				

8.9.2017 *planning purposes only, not a final schedule or an offer of employment 1 of 1

PROPOSED CLASSES W/O FACULTY

Same report as Propose Classes, but without Faculty assignments.

Fig. 61 Proposed Classes w/o Faculty

Proposed Classes w/o Faculty*

Spring 2016 — Religious Studies

Course	X	T	Est	Cap	Units	WTU	FTES	Days	Start	Min	Comments
RS 105 World Religions (1)			150	150	3	3.00	30.00	TR	11:00am	80	
RS 105 World Religions (2)			120	120	3	3.00	24.00	ONL		0	
RS 323 Sacred Texts: Hindu Texts (1)			17	25	4	4.00	6.66	MW	5:00pm	110	
RS 342 Buddhism in India & Tibet (1)			35	35	3	3.00	7.00	TR	1:00pm	80	
RS 361 Consumerism & EcoSpirituality (1)			35	35	3	3.00	7.00	TR	3:00pm	80	
Anthropology Totals						16.00	74.66				

Course	X	T	Est	Cap	Units	WTU	FTES	Days	Start	Min	Comments
ART 100 Global Perspectives in Art (1)			55	55	3	3.00	11.00	ONL	11:00am	170	
ART 103 Introduction to Art History (1)			65	65	3	3.00	13.20	MWF	1:00pm	50	
ART 104H 19th Century Art (1)			65	65	3	3.00	13.00	MW	10:00am	110	
ART 104I 20th Century Art (3)			65	65	3	3.00	13.00	TR	1:00pm	90	
ART 104J Art in the United States (1)			65	65	3	3.00	13.00	MWF	10:00am	50	
Art Totals						15.00	63.20				

8.9.2017 — *planning purposes only, not a final schedule or an offer of employment — 1 of 1

SCHEDULE CONFLICTS

Schedule Conflicts is designed to highlight scheduling that could prevent students from registering for a class. If a class with a single available section overlaps the day and time of another class with a single available section, these classes may appear on the report. One to four *s will appear next to each conflict, indicating the number of times this particular combination of classes has been taken by students in the past.

Classes which have never been taken in the same semester by students will not be listed. As enrollment reaches the cap during registration, more conflicts may appear, as there will be more classes with a single available section.

Even though a scheduling conflict exists, it may be acceptable depending on the impact of the conflict, aka how many students the conflict impacts. That impact is determined by looking at the number of students who enrolled in each of the classes in conflict in the prior academic year.

The raw counts of student enrollment are then transformed into a scale of impact that is expressed as the number of asterisks assigned to a conflict on the report.

- 1 to 3 students enrolled = *
- 4 to 8 students enrolled = **
- 9 to 11 students enrolled = ***
- 12 to 15 students enrolled = ****

Generally, this impact rating is applied as follows.

- conflict with * or ** impact rating, is usually considered an acceptable conflict
- conflict with a *** rating is one to be heavily considered before accepting the conflict
- conflict with a **** rating is a conflict that must be resolved

Fig. 62 Schedule Conflicts

Schedule Conflicts

Fall 2017 Anthropology

Impact	Course	Title	Days	Hour	GE
	ANTH 105	Archaeology & World Prehistory	MWF	12:00pm	D1
*	ANTH 350	Method & Theory in Archeology	MW	11:00am	
	ANTH 306	Ancient Mediterranean Culture	MWF	10:00am	UDD,DCGN
*	ENGL 105	Literature, Media, and Culture	MWF	10:00am	C2
**	GEOG 106	Physical Geography	MWF	10:00am	B4
	ANTH 350	Method & Theory in Archeology	MW	12:00pm	D1
*	ANTH 105	Archaeology & World Prehistory	MWF	12:00pm	D1
	ANTH 485	BioAnth Research Lab	W	2:00pm	
*	SPAN 105	Spanish Language & Culture I	MTW	2:00pm	

* = 1 to 3 students, ** = 4 to 8 students, *** = 9 to 11 students, **** = 12 to 15 students

7.20.2017

1 of 1

SIPS-CMS DIFFERENCES

The SPA-CMS Differences report provides a comparison of certain SPA data with the current values in corresponding PeopleSoft fields.

For SPA to work correctly, all of these differences should be corrected. In cases where discrepancies exist, the ASC will need to determine which applications have the corrected data and make changes accordingly.

Depending on when this report is run, SPA could be the control data - especially before PeopleSoft is deemed to be open to the ASCs by the Office of the Registrar, or PeopleSoft could contain the control data - especially after the ASC has pushed from SPA and or Census has occurred.

Fig. 63 SPA-CMS Differences

Differences Between SPA and CMS

Fall 2017 Art

Subject	Cat #	Sect		Title	Primary Instructor	Cap	Units	Mode	Days	Hour	Duration	Weeks
ART	499	30	SPA									
			CMS	Directed Studies	Alderson, Julie	1	3	C-78				
ART	499	31	SPA									
			CMS	Directed Studies	Berke. JB	1	3	C-78				
ART	499	32	SPA									
			CMS	Directed Studies	Gonzalez-Guerra, BE	1	3	C-78				
ART	499	33	SPA									
			CMS	Directed Studies	Hill, NJ	1	3	C-78				

7.18.2017 1 of 1

STUDENT FACULTY RATIO

The Student Faculty Ratio (SFR) shows the current year SFR compared with prior year SFR, by term, separated into teaching WTU and assigned time/collateral WTU, with totals.

Teaching WTUs are calculated totals of all of the WTUs allocated with teaching courses within an academic year. Within the Teaching WTUs section, there are total WTUs for both the current academic year and the previous academic year with the difference between the two values represented in the Change column.

The Assigned Time/Collat/Leave section represents all of the WTUs allocated to non-teaching duties within an academic year. Within the Assigned Time/Collat/Leave section, there are total WTUs for both the current academic year and the previous year with the difference between the two values represented in the Change column.

The Total WTU section is a row by row summary of all of the values in the Teaching WTUs section and the Assigned Time/Collat/Leave section.

The SFR section is where the student to faculty ratio is calculated for the Fall and Spring terms of both the current and previous academic years, and then compared to each other.

Fig. 64 Student Faculty Ratio

Proposed and Historical Student Faculty Ratio – College of Arts, Humanities, & Social Sciences

Anthropology

	Teaching WTU			Assigned Time/Collat/Leave			Total WTU			SFR		
	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change
Fall	64.6	60.6	4	37.8	32.8	5	102.4	93.4	9	23.86	22.66	1.2
Spring	0	65.3	-65.3	34.1	29.1	5	34.1	94.4	-60.3	0	24.68	-24.68
Annual	64.60	125.90	-61.30	71.90	61.90	10.00	136.50	187.80	-51.30	11.93	23.67	-11.74

Art

	Teaching WTU			Assigned Time/Collat/Leave			Total WTU			SFR		
	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change
Fall	203.8	206	-2.2	61.2	49.4	11.8	265	255.4	9.6	22.71	23.79	-1.08
Spring	0	216.9	-216.9	48.4	33.2	15.2	48.4	250.1	-201.7	0	24.67	-24.67
Annual	203.80	422.90	-219.10	109.60	82.60	27.00	313.40	505.50	-192.10	11.36	24.23	-12.88

CAHSS College Offerings

	Teaching WTU			Assigned Time/Collat/Leave			Total WTU			SFR		
	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change
Fall	0	0	0	0	0	0	0	0	0	0	0	0
Spring	0	0	0	0	0	0	0	0	0	0	0	0
Annual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Communication

	Teaching WTU			Assigned Time/Collat/Leave			Total WTU			SFR		
	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change
Fall	154.33	155.33	-1	23.3	21.3	2	177.63	176.63	1	22.78	24.55	-1.77
Spring	0	150.67	-150.67	20.8	26.8	-6	20.8	177.47	-156.67	0	22.41	-22.41
Annual	154.33	306.00	-151.67	44.10	48.10	-4.00	198.43	354.10	-155.67	11.39	23.48	-12.09

Critical Race Gender Sexuality

	Teaching WTU			Assigned Time/Collat/Leave			Total WTU			SFR		
	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change	2017-18	2016-17	Change
Fall	106.92	106.59	.33	11.2	11.2	0	118.12	117.79	.33	25.6	26.63	-1.03
Spring	0	101.99	-101.99	8.2	8.2	0	8.2	110.19	-101.99	0	28	-28
Annual	106.92	208.58	-101.66	19.40	19.40	0.00	126.32	227.98	-101.66	12.80	27.31	-14.52

8.9.2017 1 of 4

FACULTY PRELIMINARY ASSIGNMENTS

The Faculty Preliminary Assignments report provides a per faculty list of courses, assigned time, and collateral duties, one page per faculty.

Fig 65 Faculty Preliminary Assignments

Preliminary Assignments*

Spring 2016

Jeannette Cooper

Course	Description of Assignment	Release Code	Funding	WTUS	FTEF
ANTH 105	Archeology & World Prehistory (1)			3.00	0.20
ANTH 306	Ancient Mediterranean Cultures (2)			3.00	0.020
ANTH 485	Applied Anth Internship (1)			1.00	0.10
Anth 105	Assigned Time (1)	11a	College	0.00	0.00
			Lecturer Totals	7.00	0.50

8.9.2017 *not an offer of employment 1 of 1