UC Denver Staff Training Guide
Scheduler

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Staff Access

Go to Creating Schedules from Preferred Plan (pg. 9) if you have accessed Schedules through Planner. If not, below are steps to access Schedules through the Degree Audit system.

1. Go to UCDAccess and click on the NavBar in the upper right hand corner

2. Click on CU Resources and then select Business Tools
3. Click on **Degree Audit Denver**

4. Once in the Degree Audit system, to search for a student - either click on **Students** drop down menu and select **Search** or click on **Students Icon**
5. You can either search by Student ID or Student Name

6. Two new tabs, Plans and Schedules, will appear in the Degree Audit system, select Schedules

7. If no plans had been made in the Planner to be applied to Scheduler, go to Creating Schedules without Plans (pg. 5)
Getting Started

Creating Schedules without Plans

1. If courses are not in the Planner, courses can be manually added to Schedules
2. Once in the Degree Audit system, click on Schedules tab
3. Following the directions that pop up: Pick the term from the drop down list

NOTE: Depending on when a student is planning – there may be two terms open for registration

4. You can either add a course in the box, a department prefix or just click on Search Classes
   a. Make sure to put a space between Department and Course Code
5. Once inside Schedules application, it will walk you through a series of steps to initially set up your schedule
6. Continue adding the courses:
   a. Either type in the department prefix for a complete list of department courses or the 'department prefix SPACE course code'
   b. To view course details, click on Hide/Show All Course Details or Details under a specific course
      i. This also displays pre-requisite/co-requisite for courses
   c. Click on the green button to add under Classes on the left hand side
      i. A notification will pop up on the upper right hand corner Added Course to your Cart

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ii. If added classes do not initially show up on the left hand side, click on Classes to view the list of recent adds

d. Click on Finished Adding Classes to continue and view all added courses

NOTE: After adding classes, you may receive a notification of holds preventing you from registering, but you can continue to create schedules. Also, courses may already appear on the calendar if the student is Enrolled or Pre-Enrolled.
7. **Add Busy Time**
   a. Scheduler will direct you to block busy times on your schedule, click on **Add Busy Time** -OR-
   b. You can click on **Skip this step** if you do not need to add busy times

c. Once in **Busy Times**
   i. Enter name for your busy time
   ii. Select from the drop down menu for **Start Time** and **End Time**
   iii. Check the days of the week
   iv. Click on **Save** and busy times will show up on the schedule in grey
   v. Click on **Finished Adding Busy Times**

8. **Schedules**
   a. The scheduler will then prompt you to build your schedule by either **Create Your Own** or **Auto-Generate**
   b. You can jump to: **Create Your Own** (pg. 16) or **Auto-Generate** (pg. 19) for how-to
Creating Schedules from Preferred Plan

1. As mentioned in the Planner guide, if multiple plans have been made, a **Preferred/Starred or Locked Plan** is the only plan that can be applied to **Schedules**

2. The calendar icon will not appear if it is not the **Preferred Plan**

3. After clicking on the calendar icon through **Plan**, it will take you directly to the **Schedules** application
4. When you first enter, a pink pop up notification will let you know what all has been added

NOTE: It currently says "added to your cart", it has NOT been added and the wording is going to be fixed. The classes have just been added to the scheduler. You must click on Pre-Enroll and then courses will actually be added to the cart.

   a. An error may appear: No sessions could be found for your selected course. Please see your advisor if this error continues.
      i. If this occurs, this means that this class is not offered for the upcoming registration term
   b. You can manually add a different class if this error pops up, go to Classes (pg. ) section on how to

NOTE: Courses may already appear on the calendar if the student is Enrolled or Pre-Enrolled.

Other information when first accessing Scheduler:

1. Change Term: You may change terms depending on if two registration terms are available
2. Eligible:
   a. This section will display enrollment appointment dates and if the student is eligible to enroll
   b. If dates are in green – eligible to enroll and push courses to shopping cart to register
   c. If dates are in red or it says Date Not Found – not eligible to enroll. Student can still create Schedules, but are unable to push classes to their cart to register. The Pre-Enroll button will become clickable once they are within their enrollment appointment.
      i. Date Not Found – means the date has not been updated yet
Classes

1. Clicking on **Classes**, the imported classes will appear as a list on the left hand side
2. If you would like to add classes, you can manually add by clicking on **Add Classes**

   a. There are several ways you can search for a class:
      i. You can enter the department prefix and it will show a full list of that department's courses
      ii. If you know the full course code, enter the department prefix `SPACE` and then add the number
b. Clicking on **Hide/Show All Course Details** will show all details for courses

c. Click on the green button + Class to add

d. A notification will appear in the right hand corner that the course has been added, the class will display on the classes list

e. Click on **Finished Adding Classes** once you are done
Busy Times

NOTE: Although the Scheduler initially highlights the Schedules section after adding classes, it is better to first go to Busy Times if a student wishes to block busy times.

If you first create or generate schedules, an error may appear when adding busy times as it could conflict with already scheduled classes.

It is better to set Busy Times before generating schedules, see FAQs (pg. 34) section if schedules have already been generated and want to add a busy time.

1. After selecting Busy Times
   a. Click on Add Busy Time
b. Enter the **Name** e.g. Work

c. Select from the drop down menus of both **Start Time** and **End Time**

d. Check days of the week

e. Click on **Save**

f. Once saved click on **Finished Adding Busy Times**
Schedules
Click on Schedules once done adding classes and/or busy times, two options will appear:

Create Your Own
1. A drop down menu will appear with each course that you selected
2. Selecting a course from the drop down will set up a list of different course times/options
   a. Section
      i. E## - Online Class
      ii. H## - Hybrid Class
      iii. ### - In Person
b. Clicking on the blue ![link](image1.png) will show full section details

3. Clicking on the blue ![link](image2.png) will add the course time to the schedule
   a. **Busy Time Conflict** means the class time conflicts with your busy time
   b. A green check mark ![checkmark](image3.png) means the class has been added to the schedule
   c. A clock symbol ![clock](image4.png) means that the course conflicts with an already scheduled class
4. Once you have finished adding courses to your schedule, click on **Finished Editing Sections**

5. This will create your **Primary Schedule**
   a. The **Primary** schedule is the only one a student can use to Pre-Enroll
Auto-Generate

NOTE: Student or staff can immediately generate schedules instead of setting preferences, click on Skip this step and go to Auto-Generate Schedules (pg. 25) for more info

Also, if Busy Times have not been added, it’s best to add first before generating schedule. Scheduler reminds you to add with a link to Add Busy Times.

To add Preferences, click on Configure Preferences and it will direct you through every preference section. Or click on any of the Preference on the left hand side.
Preferences

Time-based Preferences

Time Between Classes
- Allows you to enter minimum and maximum minutes between classes

Number of Days
- Allows you to choose classes per day

Time Block – “While Busy Times is where you identify times when you can't take classes, Time Blocks is where you set the days and times when you want to take classes.”

1. Fill out Name i.e. Available
2. Select Start and End times from the drop down list
3. Check the days that correspond with available times
4. Click on Save
5. Once all preferences are set, you can either click on Next or Save & Finish
6. Save & Finish will direct you right back to Auto-Generate Schedules
7. NOTE: Clicking on Finished Auto-Generate Schedules will just take you to the main view and not generate schedules
8. You also can Reset All Preferences to Default
Number of Classes

Per the instructions – select either Take them all or I planned extra

TIP! I planned extra is useful for planning backup classes in place if some are filling up fast or may not be offered during that specific semester

1. I planned extra walks you through preferences on extra planned courses
2. Once all preferences are set, you can either click on Next or Save & Finish
3. Save & Finish will direct you right back to Auto-Generate Schedules
   NOTE: Clicking on Finished Auto-Generate Schedules will just take you to the main view and not generate schedules
4. You also can Reset All Preferences to Default
Professor Preferences

- **Professor Preferences** – identify professors you most prefer over others
  - **Want/Don't Want** – limits calendar options as schedules must include/not include these delivery type preferences
  - **Prefer/Don't Prefer** - more flexible than **Want/Don't Want** and will generate more calendars with this preference, but not necessarily remove calendars that don’t follow it
  - **Neutral** – just how it sounds, generate any schedule without any preferences

1. Once all preferences are set, you can either click on **Next** or **Save & Finish**
2. **Save & Finish** will direct you right back to Auto-Generate Schedules
   
   **NOTE:** Clicking on **Finished Auto-Generate Schedules** will just take you to the main view and not generate schedules
3. You also can **Reset All Preferences to Default**
Additional Preferences

This section depends mostly on the courses that were selected and delivery types, below is a list that may populate based on which courses were selected

- In Person
- Hybrid
- Online
  - **Want/Don’t Want** – limits calendar options as schedules *must* include/not include these delivery type preferences
  - **Prefer/Don’t Prefer** - more flexible than Want/Don’t Want and will generate more calendars with this preference, but not necessarily remove calendars that don’t follow it
  - **Neutral** – just how it sounds, generate any schedule without these particular preferences

1. Once all preferences are set, click on **Save & Finish**
2. **Save & Finish** will direct you right back to Auto-Generate Schedules
   
   **NOTE:** Clicking on Finished Auto-Generate Schedules will just take you to the main view and not generate schedules
3. You also can **Reset All Preferences to Default**
Locked Sections

1. This section shows locked courses which can be done AFTER auto-generating schedules, go to Locked Sections (pg. 27) for where to lock courses

2. If you have locked sections already set, you may unlock by clicking on the red X under Unlock
Auto-Generate Schedules

1. Once you are ready to generate schedules
   a. Under **How many schedules do you want to generate**, select the number from the drop down menu
   b. Click on **Generate Schedules**
   c. **Configure Preferences** – will just direct you to **Preferences** section

**NOTE:** An alert may appear claiming “No schedules were generated based on your current preferences please change them and try again.” This may appear as the more preferences you set, the narrower the search.

2. After generating several schedules, you go through schedules and either:
a. Click on **Save, Name your schedule** and either check as **Primary Schedule** or it will save as a **Backup Schedule**

   **NOTE:** Hidden means courses are online

-OR-

b. **View Details**
   
i. This option allows you to fully view the calendar and courses
   
   ii. Calendar view
      
      1. Courses are color coded
      2. Online courses will appear at the top as a horizontal bar
      3. You can click on courses to view details
iii. Sections

1. **Lock** – allows you to lock a class section you want to have appear on every schedule
2. **Class** – Course code and color coded to calendar
3. **Section**
   - H## – Hybrid course
   - E## – Online
   - ### – In Person
4. **Displays:** **Title, Time, Day, Start & End Dates**
5. **Seats** - It also allows you view how many seats are available
6. **The blue icon gives full details of course**

iv. **Locked Sections** - lock which ones you prefer to have appear on every schedule every time it is generated
1. Click on the lock icon next to the course you wish to set for each calendar
2. This will be saved in the locked section on the left hand side – you can unlock by clicking on the red X
v. You can click on **Save** button to save this calendar as **Backup** or **Primary Schedule**

vi. Click on **Return** to go back to other auto-generated schedules

*NOTE: This is live and linked to CU-SIS, course availability will update constantly and be sure to double check the saved calendars if courses are filled. This is why backup schedules and planning for extra can be helpful.*

3. Clicking on **Finished Auto-Generating Schedules** will take you back out to the main view and note that it will not auto-generate schedules

[Image of calendar with buttons: Return, Save]

[Image of save schedule dialog box: Name your schedule: Backup Schedule 1, Make Primary Schedule]

[Image of calendar with buttons: Return, Save]
Managing Schedules

1. Once back out in the main view of Schedules, you can access your **Primary** and **Backup Schedules**
   a. Remove **Primary** – selecting another schedule and clicking on **Make Primary** will allow you to remove your previous Primary schedule that you no longer want
   b. Remove **Backup** - if you wish to delete a specific schedule, you will need to select a different schedule in order for the trashcan to appear

2. Clicking on the schedules will display visual schedule blocks where you can:
   a. Print – this pulls up another tab to allow you to print either a **Short Calendar** or **Full Calendar**
   b. Export – this will export to your webmail calendar
   c. Email – this can be sent to anyone’s email
   d. You can also **Rename** or **Make Primary** if it’s already not set as **Primary**
3. Sections

a. **Class** – Course code and color coded to calendar
b. **Section**
   i. H## - Hybrid course
   ii. E## - Online
   iii. ### – In Person
c. Displays: **Title, Time, Day, Start & End Dates**
d. **Seats** – Allows you view how many seats are available
e. The blue icon gives full details of course
f. The red will remove a courses from Sections and the calendar
g. Edit Sections
   i. Click on **Edit Sections**

   ![Edit Sections](image)

   ii. This allows you to select different classes from the drop down menu

   iii. Selecting a course from the drop down will set up a list of different course times/option

   ![Course Selection](image)

   iv. Clicking on the blue ![section](image) will show full section details

   ![Section Details](image)
v. Clicking on the blue button will add the course time to the schedule
a. **Busy Time Conflict** means the class time conflicts with your busy time
b. A green check mark ✔️ means the class has been added to the schedule
c. A clock symbol 🕒 means that the course conflicts with an already scheduled class

vi. Once you have finished editing courses to your schedule, click on Finished Editing Sections
Info Only: Students Pre-Enrolling Classes

1. Once a student determines which schedule to enroll with
   a. Make sure the calendar is set as Primary
   b. Courses will be added to the registration shopping cart

   **IMPORTANT**: Students will still need to fully register for classes in their student portal according to their enrollment appointment. All registration rules will apply.

2. After a student registers for courses and decided not to take some scheduled classes, they can sync their calendar with their registered courses by clicking on **Sync w/ Reg Sys**
   a. This button will only appear after a student Pre-Enrolls

   **Eligible:**
   Begin: 04/16/18 at 4:00 PM
   End: 04/18/18 at 11:59 PM

   ![Pre-Enroll]
   ![Sync w/ Reg Sys]
FAQs

When I first add courses, are my courses going directly to my shopping cart?
No, the Scheduler wording is saying that but classes are actually being added to the Schedules application. Please disregard that notice as it is currently being fixed and note that they’re only being added to Scheduler. Courses will be pushed to the shopping cart when you select the Pre-Enroll button.

What does Date Not Found mean under eligible?
This area is where your enrollment appointment dates will appear. Date Not Found means that information hasn’t been updated to the system yet.

Why are some courses that I had in Planner not showing up in Schedules?
Planner will not alert you if courses are not offered for particular semesters. In Scheduler, you will receive an error message if they are not offered that semester. You can manually add another class similar to what you are trying to fulfill or plan it for a different semester.

My added Busy Time is conflicting with a course on my schedule, how do I fix this?
Select a different schedule that may have been created or create your own schedule on the list that does not conflict with your busy time. Add the time and the Busy Time will appear on all saved schedules and may overlap on some classes. Check all schedules to see if there is overlap.
I’m trying to search for a specific course, but there were no results?

Make sure you put a space between the department prefix and course code.

What’s the difference between Want/Don’t Want and Prefer/Don’t Prefer?

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t Want</td>
<td>limits calendar options as schedules must include/not include these delivery type preferences</td>
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<td></td>
</tr>
<tr>
<td>Want</td>
<td></td>
</tr>
</tbody>
</table>

Why can’t I Pre-Enroll?

There could be several reasons:

1. You are not within your enrollment appointment, you can pre-enroll if your enrollment dates are green under Eligible
2. You may have holds on your account, there will be a notification in Scheduler on the left hand side notifying you of this and your enrollment appointment shows up as red.

3. You may be trying to pre-enroll with a schedule that is not marked as Primary, make sure to change your Schedule to Primary if that’s the schedule you want applied to the registration shopping cart.

If I select Pre-Enroll button, does that mean that I’m registered for these classes?
No, the scheduled classes will then be pushed into your registration shopping cart and you can proceed with registering for classes in the CU Denver registration system.

What if I decide not to register some courses in my shopping cart, will scheduler automatically update?
No, but you can sync your schedule with the courses you registered for by selecting Sync w/ Reg Sys after you register for classes. This button will only appear after you Pre-Enroll.