ISA & Schedule Build Training

August 2020

This presentation is being recorded
Introductions

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Assistant Registrar - Scheduling

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Technical Project Manager - ISA
Agenda

1. Procedural training for Instructional Scheduling Assistant (ISA)
2. Critical information for Schedule Build submission
3. Q&A
What is the ISA?

- Instructional Scheduling Assistant
- It’s a central campus tool, sponsored by the office of the EVC, to assist all academic units, depts, and programs with planning class schedules, communicating with instructors, and receiving approval for Summer Session class offerings.
- It is an active project, with a small development team based in the Division of Biological Sciences.
- New features, tweaks to existing features, and major upgrades happen frequently in consultation with the ISA Workgroup.
- Use the “Send feedback” button in the lower left corner to send any communication to the development team.
https://blink.ucsd.edu/instructors/courses/schedule-of-classes/isa.html

Instructional Scheduling Assistant (ISA)

Learn how to get access to, and to become trained in using the ISA, an application used for scheduling classes at UC San Diego.

The Instructional Scheduling Assistant (ISA) is an application designed to assist departments, divisions, schools and units in scheduling classes at UC San Diego, obtaining approval for Summer Session class offerings, and communicating with the offices of Summer Session and the Registrar.

*Expand all

- How to get access
- ISA workgroup
- Live training
- Online training resources
- Contact / feedback
Why do we have to use it?

- To provide consistency in information flowing between 60+ units and the Office of the Registrar.
- To reduce errors in schedule build spreadsheets due to manual entry.
- To decrease amount of time it takes Registrar scheduling staff to process each unit’s schedule build spreadsheet.
How to build your schedule in the ISA
Other features not covered today

Instructor Communication tools

- Teaching Acknowledgements
- Instructor Scheduling Preferences (ISPs)

Course & Instructor Groups

Time Blocks
Annual Schedule Builder (ASB)

Copy from previous year

OR

Start from scratch
Copy from Previous Year
## Annual Schedule Builder 2022-23

There aren't any classes scheduled for this year yet.

Would you like to copy a previous year's classes to this year? As a reminder, you will only be able to copy into an empty (unpopulated, blank) year. You will not be able to copy into a year populated with classes.

[Copy schedule from a previous year]

<table>
<thead>
<tr>
<th>#</th>
<th>Course</th>
<th>Fall Qtr 2022</th>
<th>Winter Qtr 2023</th>
<th>Spring Qtr 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AIP 47</td>
<td>Academic Internship</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2</td>
<td>AIP 197</td>
<td>Academic Internship Program</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3</td>
<td>AIP 197TDC</td>
<td>Washington, DC Internship</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4</td>
<td>AIP 197F</td>
<td></td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
Copy Schedule

Copy all classes in Academic Internship Program from a previous academic year (including the following summer) to the 2022-23 year.

Double-check the year that you are copying from - this action cannot be undone.

Choose a year to copy from

- Select Year:
  - 2021-22
  - 2020-21
  - 2019-20
  - 2018-19
  - 2017-18
  - 2016-17
  - 2015-16
  - 2014-15
  - 2013-14
  - 2012-13
  - 2011-12
Copy Schedule

Copy all classes in Academic Internship Program from a previous academic year (including the following summer) to the 2022-23 year

Double-check the year that you are copying from - this action cannot be undone

Copy schedule from

2016-17

Here is a list of classes for you to review that you will be copying into the 2022-23 year.

Classes scheduled (14)

<table>
<thead>
<tr>
<th>Term</th>
<th>Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>FA16</td>
<td>AIP 197</td>
</tr>
<tr>
<td></td>
<td>Academic Internship Program</td>
</tr>
<tr>
<td>WI17</td>
<td>AIP 197</td>
</tr>
<tr>
<td></td>
<td>Academic Internship Program</td>
</tr>
<tr>
<td>SP17</td>
<td>AIP 197</td>
</tr>
<tr>
<td></td>
<td>Academic Internship Program</td>
</tr>
<tr>
<td>S317</td>
<td>AIP 197</td>
</tr>
<tr>
<td></td>
<td>Academic Internship Program</td>
</tr>
<tr>
<td>FA16</td>
<td>AIP 197F</td>
</tr>
<tr>
<td></td>
<td>Academic Internship Prq Foreign</td>
</tr>
<tr>
<td>FA16</td>
<td>AIP 197P</td>
</tr>
</tbody>
</table>

Copy all 2016-17 classes to 2022-23
### Annual Schedule Builder 2021-22

**List schedule by**
- Course
- Primary Instructor

**Terms**
- FA21
- WI22
- SP22

**Academic level**
- All academic levels

**Course Group Filter**
- All Courses

**Instructor Group Filter**
- All Instructors

**Filter by course ID/title**
- e.g. BIEE

**Include courses with no classes scheduled?**
- [ ]

**Include courses that are inactive for this year?**
- [ ]

---

The schedule needs to be empty in order to copy schedule

---

8 courses matching current filters

<table>
<thead>
<tr>
<th>#</th>
<th>Course</th>
<th>Fall Qtr 2021</th>
<th>Winter Qtr 2022</th>
<th>Spring Qtr 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AIP 97</td>
<td></td>
<td>+ Add Class</td>
<td>+ Add Class</td>
</tr>
<tr>
<td>2</td>
<td>AIP 197</td>
<td></td>
<td>+ Add Class</td>
<td>+ Add Class</td>
</tr>
<tr>
<td>3</td>
<td>AIP 197</td>
<td></td>
<td>+ Add Class</td>
<td>+ Add Class</td>
</tr>
</tbody>
</table>
Start from Scratch
Annual Schedule Builder 2022-23

List schedule by:
- Course
- Primary Instructor

Terms:
- FA22
- WI23
- SP23

Academic level:
- All academic levels

Course Group Filter:
- All Courses

Instructor Group Filter:
- All Instructors

Filter by course ID/title:
- e.g. BIEB

Include courses with no classes scheduled?
- Yes

Include courses that are inactive for this year?
- No

There aren't any classes scheduled for this year yet

Would you like to copy a previous year's classes to this year? As a reminder, you will only be able to copy into an empty (unpopulated, blank) year. You will not be able to copy into a year populated with classes.

Copy schedule from a previous year

6 courses matching current filters

<table>
<thead>
<tr>
<th>#</th>
<th>Course</th>
<th>Fall Qtr 2022</th>
<th>Winter Qtr 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AIP 97</td>
<td></td>
<td>+ Add Class</td>
</tr>
<tr>
<td>2</td>
<td>AIP 197</td>
<td></td>
<td>+ Add Class</td>
</tr>
</tbody>
</table>

QA mode
Annual Schedule Builder (ASB) - basic info

- Instruction Type
  - Found on your Course Approval or by checking ISIS (CC CRSEDLPDM)
  - Instruction Type MUST be correct in order for Section Codes to be generated correctly in ISA

- Projected Enrollment
  - This becomes Enrollment Limit in your schedule build spreadsheet

- Optional to add Instructors at this stage
Add New Class

Course
AIP 97
Academic Internship
W18.m.

Subtitle

Instruction Type
LE - Lecture

Term
FA22 - Fall Qtr 2022

Projected Enrollment

Administrator Note

Create Class
Annual Schedule Builder (ASB) - optional

Temporary Courses

- Can be used to create ISA records for courses that are going through the Course Approval process.
  - Title updates - to correctly show up on ISPs, Teaching Acknowledgements and not confuse Instructors
  - New courses that haven’t been approved yet

Temporary Instructors

- New instructors whose hiring information is not complete yet
- **Cannot** be used for instructor communication because the instructor has to have SSO
Course Editor

Course Details

This form creates a temporary course entry for schedule planning, but the course must also be officially submitted to the registrar. At this time, it's not possible to edit the subject code or course code after the course entry is initially created — you must create a new course entry for these changes.

Subject code

Course code

e.g. 4

Include codes outside current unit

Course title

e.g. Introductory Biology Lab

Academic level

Select Level...

Administrator Note

Create course
Cancel
Instructors

- Can't find an instructor? It's possible that they may be hidden by the filters. Try changing the filters to include inactive instructors.

**Add New Instructor**

Are you looking for an instructor that is not part of your unit?

<table>
<thead>
<tr>
<th>Name</th>
<th>PID</th>
<th>Email</th>
<th>RACFID</th>
<th>Record Status</th>
<th>Administrator Note</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hill, Seth J.</td>
<td></td>
<td><a href="mailto:sjhill@ucsd.edu">sjhill@ucsd.edu</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wienhausen, Gabriele</td>
<td></td>
<td><a href="mailto:gwienshausen@ucsd.edu">gwienshausen@ucsd.edu</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Quarterly Schedule Builder (QSB)

- Every class that was entered into the Annual Schedule Builder will automatically show up in its correct term within the Quarterly Schedule Builder.
- From here you can now add all class components such as discussion sections, labs, days, times, rooms, etc.
  - If it’s in department space, you can select from the dropdown. If your room doesn’t appear, please use the feedback form to request it to be added.
  - All class components must be scheduled to match the weekly contact hours indicated on the course approval.
- If the section will be offered remotely due to COVID-19, and has scheduled days/times, please select the room “RCLAS” from the dropdown.
Schedule a Class

Edit this class in Classes

Course
AIP 97 - Academic Internship

Instructor
Frehafer, Kathleen

Projected Enrollment
5

Academic level
LD

Ffrehafer, Kathleen - Instructor preferences

Status
Not Responded

Class Components (1)

<table>
<thead>
<tr>
<th>Type</th>
<th>Enrollment Limit</th>
<th>Days &amp; Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>LE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add Component

Primary? Yes

Edit
Schedule a Class

AIP 97 - Academic Internship

Instructor
Frehafer, Kathleen

Status
Not Responded

Class Components (1)

Type | Enrollment Limit | Days & Times
---|---|---
LE | | 

Add Days & Time

Location
Is this class component scheduled in non-general use space?
If the section will be offered remotely due to COVID-19, and has scheduled days/times, please select "RC Lois".
Select room...
How to submit your schedule - Step 1

On Quarterly Schedule Builder page, upper right, click “Export for Registrar”

Step 1:

- Use the button to generate the section codes and download your schedule build spreadsheet automatically created by the ISA. The download will appear in your computer’s default Downloads location.
- **This uses an algorithm that will work the best if you only use it ONCE. If you use the button more than once, you will need to MANUALLY ADJUST your section codes in the spreadsheet as the algorithm cannot account for any changes you have made.**
- Email the downloaded schedule build spreadsheet to the Registrar's office according to their emailed instructions.
# Quarterly Schedule Builder 2022-23

## Filters

### List classes by
- **Course**
- **Primary Instructor**

### Academic level
- All academic levels

### Course Group Filter
- All Courses

### Filter by course ID/title
- e.g. D1EB

### Only show classes that meet on
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

### Only show classes that have their primary component scheduled?
- NO
- YES

### Grid Width
- **Standard**
- **Wide**
- **Widest**

### Grid Height
- **Standard**
- **Tall**

### Term
- Fall Qtr 2022

### Instructor Group Filter
- All Instructors

## Class Details

<table>
<thead>
<tr>
<th>Class Details</th>
<th>Instructors</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP 97</td>
<td>Freresa, Kathleen</td>
</tr>
</tbody>
</table>

**Submit Schedule to Registrar**
How to submit your schedule

Step 1. Generate the Spreadsheet

This uses an algorithm that will work the best if you only use it ONCE. If you use the button more than once, you will need to MANUALLY ADJUST your section codes in the spreadsheet as the algorithm cannot account for any changes you have made.

Email the schedule build spreadsheet to the Registrar's office according to their emailed instructions.

☐ I acknowledge that my Chair, Provost, or Divisional Dean has approved the proposed courses and instructors (if assigned).

(Endorsement Note: Chair endorses Academic Departments; Provost endorses college programs, and Divisional Dean endorses Academic Programs.)

Generate Spreadsheet

Step 2. Provide Supplemental Information

Use the button below to go to the new Supplemental Scheduling Survey to enter all other information about your scheduling needs.

Supplemental Scheduling Survey
How to submit your schedule - Step 2

Step 2:

- Use the second button to go to the new Supplemental Scheduling Survey to enter all other information about your scheduling needs.
- **This includes Subtitles and Co-instructors, both of which can be entered in ISA, but will not be on your exported spreadsheet because the Hummingbird script cannot process those pieces of information.**
- The section codes that were generated in Step 1 can be used to enter in the Supplemental Scheduling Survey where appropriate.
How to submit your schedule

Step 1. Generate the Spreadsheet

This uses an algorithm that will work the best if you only use it ONCE. If you use the button more than once, you will need to MANUALLY ADJUST your section codes in the spreadsheet as the algorithm cannot account for any changes you have made.

Email the schedule build spreadsheet to the Registrar’s office according to their emailed instructions

- I acknowledge that my Chair, Provost, or Divisional Dean has approved the proposed courses and instructors (if assigned).

(Endorsement Note: Chair endorses Academic Departments; Provost endorses college programs, and Divisional Dean endorses Academic Programs.)

Generate Spreadsheet

Step 2. Provide Supplemental Information

Use the button below to go to the new Supplemental Scheduling Survey to enter all other information about your scheduling needs.

Supplemental Scheduling Survey
New Supplemental Scheduling Survey

Winter 2021 Supplemental Scheduling Survey

Name
(required)

Department or Unit
(required)

Email Address
(required)

Phone Number

What type(s) of course scheduling information do you need to provide? (Hover over each option for a more detailed explanation.)

Pending Course Approvals

Cross-Listed, Conjoined or Co-Scheduled Classes

Special Facilities or Circumstances (pedagogical or ADA)

Fourth Hour

Classes that meet back-to-back

Substitutes

Suppression

Note: You may need section codes to complete this form. Please submit this Supplemental Scheduling Survey after downloading your schedule build spreadsheet from ISA.
Supplemental Scheduling Survey

Complete for any of the following:

- Subtitles (in ISA, but STILL needs to be entered)
- Co-instructors (in ISA, but STILL needs to be entered)
- Cross-listed (conjoined, co-scheduled) classes (in ISA, but STILL needs to be entered)
- Pending course approvals
- Special facilities or circumstances (pedagogical or ADA needs)
- Fourth hours
- Suppression
- Out-of-class or common midterms
- Alternate final exams
- Common final exams (Saturday)
- Classes that meet back to back
- Discussion Section Scheduling Notes
Cross-listed, Conjoined and Co-scheduled

**Cross-listed courses:** Per their course approval, courses of the same level that are exactly the same, but enrollment is split between more than one department (e.g. EDS 117 & SOCI 117). These classes are required to be taught together when scheduled. Courses are duplicate credit for each other.

**Conjoined courses:** An old practice no longer approved by Academic Senate, but effectively cross-listed courses across levels (e.g. undergraduate and graduate). This is part of the course approval, and these classes are required to be taught together when scheduled. Courses are duplicate credit for each other.

**Co-scheduled courses:** Undergraduate and graduate level classes with the same title that *may* be scheduled together in the same day/time/room. Classes are *not* required to be offered together when scheduled and are not duplicate credit for each other.
Scheduling Cross-listed, Conjoined and Co-Scheduled Classes

Cross listed and Conjoined: Reach out to all departments who share these classes with you to confirm if these classes will be offered. All departments should have their department’s class on their schedule build if any one department will be offering.

Co-Scheduled: Reach out to all departments who share these classes with you to confirm if the classes offered will be co-scheduled (will they be sharing day/time room).

Each department needs to include information below on their schedule build spreadsheets for their classes. The Cross Enrollment Flag column on the schedule build should be Y for these classes.

- What days/times/rooms/instructors should be assigned? This should be the same for all classes in the grouping.
- How will you split the enrollment between all classes? Enrollment limits on your schedule build should reflect how many students are enrolling in your class only. The Supplemental Scheduling Survey needs to be completed with additional information, including overall enrollment limits.
Useful ISIS Screens for the Schedule Build

CC CRSEDLPM: Contains instruction types, contact hours (if the course is not variable units and if approved through eCourse) and where enrollment lives.

<table>
<thead>
<tr>
<th>ACTION (ACDR)</th>
<th>INST TYPE</th>
<th>SHORT DESCRIPTION</th>
<th>CREDIT/ GRADE</th>
<th>CLOCK HOURS</th>
<th>WORKLOAD TYPE</th>
<th>WORKLOAD UNITS</th>
<th>NMBR SECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA</td>
<td>Laboratory</td>
<td></td>
<td>Y</td>
<td>4.00</td>
<td>F</td>
<td>1.000</td>
<td>1</td>
</tr>
<tr>
<td>LE</td>
<td>Lecture</td>
<td></td>
<td>N</td>
<td>1.00</td>
<td>F</td>
<td>1.000</td>
<td>1</td>
</tr>
<tr>
<td>OP</td>
<td>OutsidPreP</td>
<td></td>
<td>N</td>
<td>7.00</td>
<td>F</td>
<td>1.000</td>
<td>1</td>
</tr>
</tbody>
</table>
Useful ISIS Screens for the Schedule Build

CC CRSEDATA: Contains cross-listed (XL1, XL2, XL3, etc.) and conjoined information (CJ1, CJ2, CJ3, etc.) information. Does not show co-scheduled. Also has term last taught (TLT).
Useful ISIS Screens for the Schedule Build

CC CRSEMNT: Indicates if a subtitle is allowed, not allowed or required.
Common Schedule Build Errors

- Do the hours scheduled match the course approval?
- Are am and pm correctly listed for both start and end times?
- Are the correct days of the week assigned?
- If requesting a campus room, does the section have an enrollment limit? Is the day/time a standard teaching time?
- Are you requesting more rooms than the campus has in a certain size?
- Are cross-listed, conjoined, co-scheduled classes scheduled at the same time?
- For classes with more than one component, are all parts on the schedule? Do the enrollment limits add up correctly?
Subject: subject code of the class, 2-4 four characters.

Course: course number for the class, 1-3 numbers possibly followed by 1-2 alpha characters.

Section: section code for the class. Usually the primary piece is A00, with related sections (if any) having the same starting letter (A01, A02, etc. and A50, A51, etc. for a third component). Numbers (001, 002) are used for independent study sections and classes likely to have more than A00-Z00 will allow.

Section Status: AC is where students enroll, NC is part of the class, but not where students enroll.

Instruction Type: based on the course approval. Only approved instruction types may be used.
The Excel File - What does it all mean?

**Enrollment**: enrollment limit for the section. If needed, used by Registrar’s Office to place in the right size room.

**Meeting Days, Start and End Times, a/p**: day/time information for the section. (M T W R F S U)

**Building and Room**: location information for the section. Cannot list without a day and time. Should be left blank if requesting a campus room.

**PID and Primary Instructor**: primary instructor’s nine-digit PID. Secondary instructors should be added to the supplemental form.

**Cross Enrollment Flag**: Y indicates that the section is cross listed and the enrollment limit is only part of what is needed. It is an indicator for the Registrar’s office to look at your supplemental form.
Questions?

This training material will be posted to the new ISA Blink page after all training sessions are done.

https://blink.ucsd.edu/instructors/courses/schedule-of-classes/isa.html

Registrar Team
registrar-scheduling@ucsd.edu

ISA Development Team
isa-help@ucsd.edu or “Send Feedback” button within ISA menu