

General Assignment Scheduling Compliance Dashboard

Functional Documentation

Latest update: 1/13/2016 by Wood Foster-Smith

Purpose

The Office of the Registrar controls “General Assignment” (GA) classroom space on campus. To ensure fair use by all departments, there is a set of rules around how individual departments are allowed to schedule classes into GA classrooms. The compliance dashboard is designed to be a “one-stop shop” for real-time information about how a given department (or department cluster) is meeting or not meeting each rule based on its schedule of classes and associated meeting patterns. This allows schedulers to “self-police” their compliance with the rules, so that OR staff does not need to laboriously enforce the rules for all schedulers.

Requesting and Assigning General Assignment Space

Rooms are defined as General Assignment (or not) in the CS Facility Table. When scheduling classes, schedulers request a GA classroom by entering the Facility ID ‘REQGA’ on the meeting pattern. Schedulers are not allowed to request specific rooms by entering a specific Facility ID. The REQGA code is the marker that feeds the meeting pattern data to Series25 for assignment to an actual GA room. The assigned room is then fed back to CS and the REQGA Facility ID is replaced with the assigned Facility ID.

Most of the queries included in the dashboard include only classes that are either requesting or are assigned a GA classroom. The exceptions are the two queries related to meeting pattern conflicts, which return data on all classes for a department or cluster that have conflicts, regardless of GA status. This is so that all conflicts will be found, even if only one of the classes involved in the conflict is requesting a GA room. The Colloquium Class report also returns data on all classes with component type COL, regardless of GA status.

Departments, Clusters, and Subjects

In CS, academic departments are referred to by Subject code (MATH, PHYSICS, ANTHRO, etc.) For purposes of enforcing GA scheduling compliance, some Subjects are grouped into Clusters, and the compliance rules are applied against all subjects in the cluster, rather than individually. Clusters are defined in the “External Subject” field of the CS Subject Table and (as of this writing) have codes CL01 through CL30.

Subjects that are not part of a cluster are considered a “cluster of one” and their cluster code is the same as their subject code (such as PHYSICS). The current cluster configuration is available via the “Clusters and Subjects” link in the left pane of the Compliance Dashboard, and also via Query Viewer, query name UCCS_R_CONFIG_CLUSTERS.

Access

To access the Dashboard, log into Campus Solutions and navigate to:

Main Menu > CAL Components > Student Records > Compliance Dashboard

Left Pane Navigation

Compliance Dashboard

CS Links

- Maintain Schedule of Classes
- Update Sections of a Class

Search

- Class Search
- Class Search(Student)
- Browse Course Catalog
- Print Class Schedule

Combine Sections

- Combined Sections Table
- Identify Combined Sections
- Schedule Class Meetings

Schedule New Course

.....

External Links

Scheduling Toolbox
Office of the Registrar's Scheduling Toolbox
or Staff

The left-hand pane has two sections containing useful links related to the task of GA room scheduling. The “CS Resources” section contains direct links to CS pages involved in class scheduling. The “External Resources” section contains links to UCB resources related to class scheduling, such as the “Scheduling Toolbox” page of the OR website. These sections may be minimized or re-sized using the controls in the section headers.

Clicking on any of these links will open the target page in a new browser tab. The Compliance Dashboard page will remain on the original tab and you can return to it without re-loading.

Dashboard Queries

The main focus of the dashboard is the set of queries that show whether a cluster or subject is meeting each compliance rule. Each query is contained in a “pagelet” in the main window of the dashboard. Pagelets can be re-positioned in the window by dragging their header bars, and they can be minimized and expanded to hide and show their results using the settings dropdown icon.

Compliance Dashboard

Prime-time 70/30 Split

Term	Cluster	Cluster Descr	Status	Primary Prime Time	Secondary Prime Time	Action
2158	CL02	Applied Science & Technology	MET	5 (63%)	2 (100%)	None

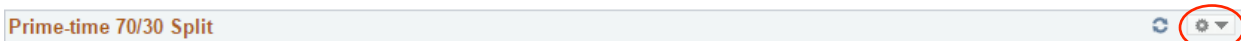
50/50 Weekday Split

Term	Cluster	Cluster Descr	Status	MWF Count	TR Count	Action
2158	CL02	Applied Science & Technology	NOT MET	1	4	Move 1 TR to MWF

Query Personalization

Each of the 8 pagelets must be “personalized” with a term and cluster. When you first access the dashboard, each pagelet will show a message saying “this pagelet must be personalized.” Once personalized, the dashboard will remember the settings until you change them again.

To personalize a pagelet, click the settings dropdown at the right-hand end of the pagelet’s header bar:

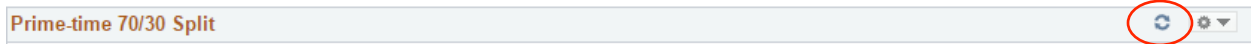


And then choose “Personalize” from the dropdown menu. A pop-up window will open asking for a term code and a cluster.

- If a single subject code that is part of a cluster (such as ANTHRO) is entered, the queries will not work properly. Only the cluster code (CL01 through CL28) will work for subjects that are part of a cluster.
- Entering ALL for the cluster will return a row of data for every cluster. OR will use this method to gain access to data across all clusters.

- Clusters **must** be entered in ALL CAPS, or the queries will return no data.

When finished entering the term and cluster, click the “Save” button to return to the main dashboard page*. Then re-load the pagelet by hitting the re-load button in the pagelet header bar:



This will load data for the term and cluster entered.

Term	Cluster	Cluster Descr	Status	Primary Prime Time	Secondary Prime Time	Action
2158	CL02	Applied Science & Technology	MET	5 (63%)	2 (100%)	None

Repeat the personalization procedure for each of the remaining pagelets. Personalizations are saved in the system for each individual user until they are changed, and queries will load automatically thereafter when the dashboard is accessed. Typically it will only be necessary to update the personalization settings when the term changes, unless a scheduler needs to view data for more than one cluster.

*When personalizing pagelets for the first time, the system sometimes changes to a page that is missing the left pane and top pane navigation controls. If this happens, hit the browser’s back button to return to the full dashboard page, and then click the pagelet’s refresh button to load the data.

Re-loading queries to see real-time changes

The dashboard is designed to give real-time information about compliance status for each rule. However, query results do not re-load automatically after changes are made to the class schedule on another page. To view updated real-time data in the dashboard after making schedule changes, either re-load the entire dashboard (which will re-load all queries), or re-load an individual query by clicking its refresh button.

Using query drilldowns

Each query has only summary data about a cluster’s compliance with a scheduling rule. If a cluster includes more than one subject, the data shown includes all subject that are part of the cluster, and this ultimately determines whether or not the cluster is in compliance with the rule. But there are two ways to drill down to more detailed data about the rule:

1. Drill down to subject-level summaries:

In each pagelet, the **Cluster** column shows the cluster code or subject for which the pagelet has been personalized. This value is a hyperlink which, for any of the cluster codes (CL01-CL30), will open a new browser tab and display the same summary data for each subject in the cluster, rather than for the cluster as a whole. For un-clustered subjects (“clusters of one”), this drilldown still works, but simply duplicates the data shown in the main pagelet.

Term	Cluster	Cluster Descr	Status	Primary Prime Time	Secondary Prime Time	Action
2158	CL02	Applied Science & Technology	MET	5 (63%)	2 (100%)	None

Note that the MET/NOT MET values shown for individual subjects are not used to determine whether the cluster as a whole is in compliance with the rule; only the status for the cluster as a

whole is used. It is possible for individual subjects to show NOT MET and still have the cluster as a whole be MET.

2. Drill down to class-level detail:

From either the main pagelet or from the subject-level drilldown report, the **Met Indicator** column shows either MET or NOT MET. This value is a hyperlink which opens a new tab and displays detail on the individual classes that are contributing to the rule. From the main pagelet, all classes for the cluster are shown; from the subject drilldown page, only classes for that subject are shown.

Term	Cluster	Cluster Descr	Status	Primary Prime Time	Secondary Prime Time	Action
2158	CL02	Applied Science & Technology	MET	5 (63%)	2 (100%)	None

Typically, the class-level detail drilldown only needs to be used when the status is NOT MET (to see how individual classes are causing that status). In all but three of the queries, clicking on the drilldown link when the status is MET will result in a blank drilldown report, because there are no classes that do not meet the rule.

Individual Queries

Prime-Time 70/30 Split

Rule: No more than 70% of GA primary sections and 70% of GA secondary sections are allowed to meet during “prime-time” classroom hours. Refer to the Scheduler’s Toolkit for the definition of prime-time hours.

The rule is MET when the percentage of primary and secondary sections are both 70% or lower, or if there are 4 or fewer sections in the group (in this case, the 70/30 rule is not enforced).

The query has summary columns showing:

- The number and percentage of primary prime-time sections
- The number and percentage of secondary primary-time sections
- If status is NOT MET, the number of sections that need to be moved to non-prime-time in order to meet the rule of having no more than 70% in prime-time.

Class detail drilldown query: Shows all GA classes for the cluster (whether MET or NOT MET), showing whether they are primary or secondary and whether they are in prime-time or not.

50/50 Weekday Split

Rule: GA classes that meet for 3 hours per week at 8:00am or later (Mon-Wed-Fri for one hour, Mon-Wed, Wed-Fri, or Mon-Fri for 90 minutes, or Tues-Thurs for 90 minutes) must have no more than 50% meeting on Tues-Thurs.

The rule is MET when the number of TR sections is 50% or less of the total (allowing for one extra TR section in the case of an odd total number of sections).

Summary columns:

- Number of MWF sections
- Number of TR sections
- If status is NOT MET, number and type of sections that must be moved from TR to MWF to meet the 50/50 rule

Class detail drilldown query: Shows all GA 3-hour per week MWF, MW, WF, MF, and TR classes for the cluster, sorted by MWF and TR meeting patterns (whether MET or NOT MET).

GA Hours Limit:

Rule: Each cluster has a limit to the number of hours per week it can schedule in GA space. The limit is equal to 110% of the number of hours per week it had in GA space for classes with nonzero enrollment during the same term the previous year (rounded to the nearest half hour). So if a cluster had 100 hours per week in GA space last year, it is limited to 110 hours this year. **Note for Fall 2016:** Enrollment data is not yet present for Fall 2015 in Campus Solutions during the scheduling window, in order to allow accurate calculation of each cluster’s limit for Fall 2016. Therefore, OR will calculate the limit for each cluster based on DB2 data and distribute to each cluster’s schedulers. The dashboard report will display a limit of 0 hours and a status of CHECK WITH OR. You may still use the drilldown report to see the classes that are contributing to the total for the term.

The rule is MET when a cluster is at or below its limit for GA hours per week.

Summary columns:

- Current term's limit
- Current term's actual hours per week
- If status is NOT MET, number of hours that must be moved out of GA space to meet the limit

Class detail drilldown query: Shows all GA classes for the cluster (whether MET or NOT MET, with hours per week shown for each).

Capacity Limits

Rule: GA classes may not request room capacities of less than 14 or greater than 732 (there are no GA rooms with capacities outside this range). This includes both individual classes and requested capacities for combined sections.

The rule is MET when a cluster has no capacity requests for less than 14 or greater than 732.

Summary columns: Number of classes not within these capacity limits (e.g. requested capacity less than 14 or greater than 732).

Class detail drilldown query: Shows all GA classes for cluster not within capacity limits. If status is MET, this report will be blank.

Standard Meeting Patterns

Rule: GA Classes must adhere to certain standardized time blocks. The logic for what constitutes a standard time block is defined by OR and may change each term. Please refer to the Scheduler's Toolkit for the definition as of a given term.

The rule is MET when there are no classes that have non-standard time blocks according to this logic.

Summary columns: Number of classes that have non-standard time blocks.

Class detail drilldown query: Shows all GA classes for cluster with non-standard time blocks. If status is MET, this report will be blank.

Non-15 Week Classes

The query behind this pagelet is not yet properly functional. Please refer to OR communications for guidance on adhering to this rule.

Primary/Secondary Meeting Pattern Conflicts

Rule: Meeting patterns for secondary sections may not conflict with meeting patterns of primary sections for the same class and associated class number (excluding 9999). This would create a situation in which students could not attend both primary and secondary sections because they occur at overlapping times.

The rule is MET when there are no classes that have such conflicts. This query includes both GA and non-GA meeting patterns, to ensure that no such conflicts exist regardless of GA status.

Summary columns: Number of such conflicts.

Class detail drilldown query: Shows all classes (GA and non-GA) for cluster with such conflicts. If status is MET, this report will be blank.

Internal Meeting Pattern Conflicts

Rule: If a single class has multiple meeting patterns, they may not conflict with each other.

The rule is MET when there are no classes that have such conflicts. This query includes both GA and non-GA meeting patterns, to ensure that no such conflicts exist regardless of GA status.

Summary columns: Number of such conflicts.

Class detail drilldown query: Shows all classes (GA and non-GA) for cluster with such conflicts. If status is MET, this report will be blank.

Colloquium Meeting Patterns

Note: This query is hidden by default, because the coding is not currently in place in PRD to support the query. It can be displayed by going to the "Personalize Content" link in the upper right of the screen, and checking the box next to the "Colloquium Classes" item.

Rule: Classes designated as "Colloquium" classes must adhere to specific meeting patterns for each class, maintained outside the CS database by OR staff. Component type COL is used to identify classes in this category; this is defined at the course catalog level (controlled by COSI) and should not be changed at the class schedule level.

Because the allowable meeting patterns for each colloquium class are not stored in the CS database, there is no way to check for whether the meeting patterns assigned to these classes are in compliance with their OR-defined patterns. Therefore, the most this query can do is list the classes designated in CS as colloquiums for purposes of this rule, so that their meeting patterns may be easily checked against the external source.

Because no determination can be made on whether a rule is MET or NOT MET, the status indicator for this query appears as either NONE (if a cluster or subject has no designated colloquium courses) or CHECK PATTERNS (if at least one designated colloquium class exists).

Class detail drilldown query: If the compliance status is CHECK PATTERNS, the drilldown report shows designated colloquium classes (GA and non-GA) for the cluster with their assigned meeting pattern. The user or OR staff must check against the external source to verify that the designated meeting pattern for the class is being adhered to. If status is NONE, this report will be blank.