Block (Batch) Enrollment

"Block Enrollment" is the terminology used in Campus Solutions, though it's more commonly thought of as a "batch" process.

Best Practices for **Block Enrollment** use are the following TWO cases:

- 1) to directly Enroll a group of students into a class or a block of classes
- 2) to Drop a group of students from a class (Instructor Drop)

DO NOT use Block Enrollment to add students from the waitlist.

If the student used the CalCentral swap feature to add themselves to your waitlist, you will disrupt the automated process that the system runs for the student in dropping the second class.

Block Enrollment can be used for single or multiple groups of classes. This means that you can block-add or block-drop (or make other changes) a group of students for multiple classes. However, if the group of classes or the group of students are different, than the process must be repeated per each Class Block + Student Block.

There are three steps for processing Block Enrollment:

- 1) Create Class Block
- 2) Create Student Block
- 3) Block Enroll Merge

Creating a Class Block

- 1. From the Main Menu, navigate to:
 - **Records and Enrollment >**
 - Enroll Students >
 - Block Enrollment >
 - **Create Class Block.**

Main N	Menu		÷		
	CAL Components		🕨 👻 Sea		
	Manage GT eForms™ 3	.0	•		
	Self Service				
	Records and Enrollmen		Enroll Students	Block Enrollment	Run Mass Change
	Curriculum Managemen		Enrollment Summaries	Student OEE Enrollmen	Mass Change Definition
	Set Up SACR		Term Processing	Student Milestones	Create Student Block
	out op onton			Search in Catalog	Create Class Block
				Search for Classes	Block Enroll Merge

2. Select the Add a New Value tab.

(If a **Class Block** already exists from a previous term/year, search up the specific **Class Block** under the **Find an Existing Value** tab and skip to step number **6**).

Favorites Main Menu Favorites Favorites	roll Students 🔻 > Block Enrollment 🔻 >	Create Class Block
Berkeley	Menu 👻 Search	>> Advance
Create Class Block Enter any information you have and click Search. Leave fields blank for a list Find an Existing Value	of all values.	
Academic Institution: = VUCB01 Q Class Enrollment Block begins with V Description: begins with V Case Sensitive		
Search Clear Basic Search 🖾 Save Search Criteria		

- 3. Create and enter your class block code in the Class Enrollment Block field.
- 4. Select Add.

code is max. 5 characters. You will use this same code when you create your student block. For convenience, consider using the same codes throughout using initials and numbers. Since all student and class blocks are viewable by everyone, there may be a case where codes overlap/duplicate when trying to add a new value. If they find a student/class that is not theirs, they should create a new one.

NOTE: The Class Enrollment Block

Create Class Block
Eind an Existing Value Add a New Value
Academic Institution: UCB01
Class Enrollment Block: test1
Add

 On the next screen, enter a Description. This can be up to 30 characters and should include your block code and the term code you are creating this for (e.g., 2168 for Fall 2016).

Block Enro	ollment Cla	asses				
Academic Ins	stitution:	UCB01	UC Berkeley			
Class Enrolln	nent Block:	TEST1	*Description: test1 2168			
				Find View A	II First	🕚 1 of 1 🕑 Last
*Term: 2168 Q	*Action Enroll Reason Drop	Class	Nbr Grading Basis Units C Grade In Q	rse Count Related 1 F	Related 2	+ -

 Enter (or update as needed) the Term, select your Action, enter the Class Nbr and Related class number(s), if applicable.

- 7. Select Save.
- To add additional classes to your Class Enrollment Block, select the plus icon (+) to add a new row and repeat steps 6 & 7 until your class block is complete.

Block Enrollment Classes
Academic Institution: UCB01 UC Berkeley Class Enrollment Block: TEST1 *Description: test1 2168
Class Enrollment Block: TEST1 *Description: 1012108 Find View All First ④ 1 of 1 ④ Last
*Term: *Action Class Nbr Grading Basis Units Crse Count Related 1 Related 2 2168 Q Enroll Image: State
Reason Drop if Enroll Grade In MBA 223 001 Q Q Corp Fin Reporting Regular Graduate Transcript Note ID: Q Repeat Code: Q Instructor ID:
Overrides
Access ID: Class Links Class Permission TimeConflict Action Date Career Class Units Service Indicator Unit Load Appointment Closed Class Grading Basis Requisites Wait List Okay Dynamic Dates Class Service Indicator Service Indicator Service Indicator
Requirement Designation
Ovrd Requirement Designation Requirement Designation Option: Requirement Designation: Requirement Designation Grade:
Go to: Add Merge Process Class Block Defaults Image: Save Image: Notify Image: Refresh Image: Add Image: Defaults

Block Enrollment Classes										
Academic I	nstitution:	UCB01 UC	Berkeley							
Class Enrol	Iment Block:	TEST1 *De	scription: test	1 2168						
						Find View	All Firs	t 🕙	1 of 1	Last
* Term: 2168 Q	*Action Enroll	Class Nbr 33331	Grading Bas	is Units 3.00	Crse Count	Related 1 33537 Q	Related 2			+ -
	Reason Drop) if Enroll	Grade In	MBA	223	001				
	Q		٩	Corp Fir	n Reporting Regul	ar Gradus	ite			

Creating a Student Block

 Select New Window to open a new Campus Solutions tab in your browser.

> This will help you easily refer back to the class block code and description for your next step.



 On the new tab, select Block
 Enrollment on the top menu bar (breadcrumbs/file path), and then select Create Student Block.

11. Select the **Add a New Value** tab.

(If a **Student Block** already exists from a previous term/year, search up the specific **Student Block** under the **Find an Existing Value** tab and skip to step number **14**).

- 12. Enter the Student Enrollment Block code, matching the Class Enrollment Block code you just created.
- 13. Select Add.
- Enter the *Description, matching the Class Enrollment Block Description from the previous screen.

For existing **Student Blocks**, Clear out the students who currently exist by selecting the **Clear** option to the right of the ***Description** box.

<u>File Edit View History Bookmarks Too</u>	ols <u>H</u> elp	_				
Create Class Block	reate Class Block × +					
(1) A https://bcsintqat.is.berkeley.et	du/psp/bcsqat_1/EMPLOYEE/HRMS/c/MANAGE	C 🔍 Search 🔂 🖨 🔽				
	ecords and Enrollment 🔻 🚿 Enroll Students 🔻 🗧	Block Enrollment 🔽 > Create Class Block				
Berkeley	Menu 👻 Search	 Block Enroll Merge Create Class Block 				
		Create Student Block				
Create Class Block Mass Change Definition						
Enter any information you have and click Sea	arch. Leave fields blank for a list of all values.	Run Mass Change				

Favorites 🔻	Main Menu 🔻	> Records ar	nd Enrollment 🔻	> Enroll St	udents 🔻 >	Block Enrollm	ent 🔻 >	Create Student Block
Berk	eley				Menu 👻	Search		>> Advanc
Create Stud	dent Block							
Eind an Exist	ting Value Add a	New Value						
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Add								

S							
CB01 UC Berkeley							
EST1 *Description: test1 2168	Ţ	Clear					
	Find View All 💷 🏢	First 🕚 1 of 1 🕑 Last					
	*Academic Career						
	Q	+ -					
Go to: Add Merge Process							
E		ST1 *Description: 12168 Find View All 2 18 *Academic Career					

There are two options for entering students into the student block:

Option 1: Manual selection

- 15. Enter the student's SID in the Empl ID field or select the look up icon () to open the Look Up table and search for the student by name.
- **16.** Enter the student's **Academic Career** (e.g., UGRD, GRAD).
- Select the plus (+) button to continue adding students.
- **18.** Select **Save** when finished creating list.

Block Enrollment Stud Academic Institution: Student Enrollment Block:	dents UCB01 TEST1	UC Berkeley *Description:	test1 2168	Clear
*Empl ID 1 Population Selection	Name		Find View All 🖉 🗰	First 1 of 1 Last
Population Selection Go to: Add Merge Process Image: Save Image: Notify Image: Ref	resh		□ • A	dd 🖉 Update/Display

Option 2: Upload a .csv file

Prepare your file to upload. Do NOT use headers as the process will fail.

19. In Excel:

- Column A = SID
- Column B = Academic Career
- **20.** Convert the Excel file to a CSV (Comma delimited) file and save to your computer.

	А	В	
1	26991600	GRAD	
2	26991617	GRAD	
3	26991624	GRAD	
4	26991631	GRAD	
5	26991655	GRAD	
6			
7			

- 21. Select the Population Selection checkbox to activate the Upload File process.
- 22. On the Selection Tool drop list, select External File.
- 23. Select Upload File.

Block Enrollment Students								
Academic Institution:	UCB01	UC Berkeley						
Student Enrollment Block:	TEST1	*Description:	test1 2216	3	Clear			
				Find View All	📑 First 🕙 1	of 1 🕑 Last		
*Empl ID	Name			*Academic Career				
1				Q		+ -		
Population Selection Population Selection Selection Tool:	External File		•					
Attached File:	External File			Upload File	Delete File Vie	ew File		
File Mapping:	1 o Query			Create File Mapping				
Fill Student Bloc	(
Go to: Add Merge Process								
🔚 Save 🔚 Notify 📿 Re	fresh			(📑 Add 🛛 🔎 Upd	ate/Display		

24. Select Browse to select your prepared .csv file from your local computer.







Select the look up icon (Q) to open the Look Up table for the File Mapping field.

Population Selection			
Population Selection Selection Tool:	External File 🗸]	
Attached File:	STUDENT_TEST1_BLOCK_1.csv		Upload File Delete File View File
File Mapping:		Q	Create File Mapping
Fill Student Bloc	k		



27. Select BLOCK ENROLL.

NOTE: If the BLOCK ENROLL selection does not automatically appear, select the Look Up button.

Look Up File Mapping								
				Help				
File Mapping Name: begins with 👻								
			_					
Look Up	Clear	Cancel	Basic Lookup					
Search Result	ts							
View 100 First	1-2 of 2	Last						
File Mapping Nar BLOCK ENROLI EMPLID_ONLY								

28. Select the Fill Student Block button.

Block Enrollment Stu	dents			
Academic Institution:	UCB01 UC Berkeley			
Student Enrollment Block:	TEST1 *Description:	test1 2168		Clear
			Find View All 🔄 🔜	First 🕚 1 of 1 🕑 Last
*Empl ID	Name	*/	cademic Career	
1			Q	+ -
Population Selection				
Population Selection				
Selection Tool:	External File	-		
Attached File:	STUDENT_TEST1_BLOCK_1	1.csv	Upload File Dele	ete File View File
File Mapping:	BLOCK ENROLL	Q	Edit File Mapping	Preview Selection Results
Fill Student Block	¢			
Go to: Add Merge Process				
🔚 Save 🔛 Notify 📿 Re	fresh		E .	Add 🔰 Update/Display

The students you entered will appear in the upper portion of this page.

Block Enrollment Stu	idents				
Academic Institution:	UCB01 UC Berkeley				
Student Enrollment Block:	TEST1 *Description:	est1 2168		Clear	
		Fin	id View All 💷	First 🕚 1-5	of 5 🕑 Last
*Empl ID	Name		demic Career		
1 26 🔍	Ha	GRA	DQ	Graduate	+ -
2 26	Ad _	GRA	DQ	Graduate	• -
3 26	Lir	GRA	DQ	Graduate	+ -
4 26	Zir	GRA	DQ	Graduate	+ -
5 26	Zh	GRA	D Q	Graduate	+ -
Population Selection					
Population Selection					
Selection Tool:	External File	•			
Attached File:	STUDENT_TEST1_BLOCK_1.c	SV	Upload File	Delete File Vie	w File
File Mapping:	BLOCK ENROLL	Q	Edit File Mapping	Preview Sele	ction Results
Fill Student Bloc	k				
Thi Student Dioc					
Go to: Add Merge Process					
🔚 Save 🔚 Notify 📿 Re	fresh			📑 Add 🛛 🔊 Upda	ate/Display

29. Select Save.

Block Enroll Merge

 Select Block Enrollment on the top menu bar (breadcrumbs/file path), and then select Block Enroll Merge.

Favorites 🔻 🛛 Main Mer	·▼ > Record	is and Enrolimen	t 🔻 > Enroll Students 🔻	> Block	KEnrollment 💌	Create Student Block
Berkeley					Block Enroll Me Create Class B	
Block Enrollmen	Students				Create Student Mass Change [Block Definition
Academic Institution: Student Enrollment B	UCB01	UC Berkeley *Description:	test1 2168		Run Mass Cha	nge Clear

31. Select the Add New Value tab.

Block Enroll Merge			
Enter any information you h	ave and click Search. L	eave fields blank for	a list of all values.
Find an Existing Value	Add a New Value		
Search Criteria			

- **32.** Enter your **Student Block** code and your **Class Block** code.
- **33.** Select the **Merge** button.

34. Select Submit.

If the **Request Status** shows "Errors" after selecting **Submit**, take the following steps to resolve these errors. Many override options will

35. On the **Detail Status** drop list, select **Errors**.

be available to you.

Favorites 🔻	Main Menu 🤊	Record	Is and Enrollment 🔻	> Enroll St	udents 🔻 >	Block Enrollment 🔻 >	Block Enroll Merge
Berke	eley						Menu 🚽
Block Enroll I	Merge Bloo	ck Enroll <u>D</u> etail	Block Enrl D <u>e</u> tail1	Block Enrl	De <u>t</u> ail2		
Enrollment	Request ID:	0000000000	Requ	est Status:	Pending	Submit	
Merge Bloc	:ks						
Academic I	nstitution:	UCB01	UC Berkeley			Merge	
Student Blo	ock:	TEST1	test1 2168			Merge	
Class Block	C:	Detail / Create					
Filtering Cr	riteria						
Academic C	Career:					Retrieve	
Term:							
Class Nbr:		Q	Detail Status:				
Empl ID:							
Save	🛛 Notify 🛛 🕄	Refresh				📑 Add 🔰	Update/Display

Block Enroll Merge	Block Enroll Detail	Block Enrl Detail1 Block Enrl Detail2	
Enrollment Request II	D: 0000233074	Request Status: Pending	Submit
Merge Blocks			
Academic Institution	UCB01	UC Berkeley	Merge
Student Block:	TEST1	test1 2168	INCIGO
Class Block:	Detail / Create TEST1 Detail / Create	test1 2168	

Block Enroll Merge Bloc	ck Enroll <u>D</u> etail	Block Enrl D <u>e</u> tail1 Block Enrl I	De <u>t</u> ail2
Enrollment Request ID:	0000233074	Request Status:	Errors
Merge Blocks			
Academic Institution:	UCB01	UC Berkeley	
Student Block:			Merge
Class Block:	Detail / Create		
	Detail / Create		
Filtering Criteria			
Academic Career:	Q		Retrieve
Term:	Q		
Class Nbr:	Q	Detail Status:	
Empl ID:		C Errors Messages	
🔚 Save 🔯 Return to Se	earch 1 Previ	Pending us in List ↓ Success	t fy 📿 Refresh 📑 Add

36. Select the **Retrieve** button to review the details for individual errors.

Filtering Criteria			
Academic Career:	Q		Retrieve
Term:	Q		Reality
Class Nbr:	Q	Detail Status: Errors -	
Empl ID:		٩	

37. This brings you to the Block Enroll Detail tab. Select the DETAIL link for each student to view each error.

38. In this example, the error is that the class is full. If there is an open waitlist for the class, you can resolve the error by choosing to add the student to the waitlist.

Block B	Enroll <u>M</u> erge	Block Enroll Detail	Block E	Enrl D <u>e</u> tail1	Block Enrl D	e <u>t</u> ail2			
Enrol	lment Reques	t ID: 0000233074							
				Pe	rsonalize Find	View All 🗖	🔣 🛛 Fir	rst 🕚 1-5 of 5	🕑 Last
Seq #	ID	Name		Term	Career	Class Nbr	Action	Status	DETAIL
1	26	L,		2168	GRAD	33331	Enroll	Errors	DETAIL
2	26	Ρ		2168	GRAD	33331	Enroll	Errors	DETAIL
3	26	L		2168	GRAD	33331	Enroll	Errors	DETAIL
4	26	D		2168	GRAD	33331	Enroll	Errors	DETAIL
5	26	F		2168	GRAD	33331	Enroll	Errors	DETAIL

			1	Institution:	UC Berkele	У	
	Primary	Prog:	Graduate Prof	fessional Program	is Term	1: 201	6 Fall
Class Nbr				Grading Basis	Related 1	Related 2	Permiss
18173	MATH	1A	001	GRD Q	18124 Q	Q	
				Grade In	Units Taken		
	Regular	Uni	dergrad	Q	4.00		
User ID:	184383						
					Ser Ser	vice Indicat	or
			Grading Basis		Time Conflict		
Class	Units		Requisites		UWait List Okay		
				Find 1 Mis		a (4) 1 at	• Last
Severit	V: Error		i ast iln				Coo
640,7)	J. LIN		Lust op		00120110112.	54,551 M	
not process	ed. The enro	oliment	limit for the spec	cified class has be	en reached.		
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6	18173 User ID: Closed Class Class Severity 640,7)	Class Nbr 18173 MATH Calculus Regular User ID: 184383 Closed Class Class Links Class Units Severity: Error 640,7)	18173 MATH 1A Calculus Regular Un User ID: 184383 Closed Class Class Links Class Units Severity: Error 640,7)	Class Nbr 18173 MATH 1A 001 Calculus Regular Undergrad User ID: 184383 Closed Class Gradin Class Links Permi Class Units Requi Severity: Error Last Up 640,7)	Class Nbr Grading Basis 18173 MATH 1A 001 GRD Q Calculus Regular Undergrad Grade In Q User ID: 184383 Closed Class Grading Basis Class Links Permission Class Units Requisites Find Vie Severity: Error Last Update DateTime: 640,7)	Class Nbr Grading Basis Related 1 18173 MATH 1A 001 GRD C 18124 C Calculus Regular Undergrad Grade In Units Taken Calculus Indergrad Grade In Consection Intervention Interventin Interventin Intervention Intervention Interventin Interventio	Class Nbr Grading Basis Related 1 Related 2 18173 MATH 1A 001 GRD Q 18124 Q Q Q Calculus Regular Undergrad Grade In 4.00 User ID: 184383 User ID: 184383 Grade In 4.00 User ID: 184383 Grade In 4.00 User ID: 184383 Grading Basis Service Indicate Class Links Permission Unit Load Class Units Requisites Units Okay Find View All First 4 1 of 1 Severity: Error Last Update DateTime: 05/28/16 12:54:59PM 640,7)

- **39.** To resolve a "class full" error, select the **Wait List Okay** checkbox.
- 40. Select Save.

Access ID: Total Ac	13.5.2279 Carrier Wellington States and the		Service Indicator
Action Date	Closed Class	Grading Basis	Time Conflict
Appointment Career Dynamic Dates	Class Links	Permission Requisites	Unit Load
lessages		Find View Al	First 🚯 1 of 1 🕑 Last
Message Sequence: 1 Not Enrolled, Class 18124 F	Full. (14640,7)	Last Update DateTime: 05/	28/16 12:54:59PM eached.
The requested enrollment a	and that the proceeded. The entenines		
	itlist Ok option and resubmit the reque	st.	

41. Select the **Block Enroll Detail** tab to select and resolve the next error.

nroll <u>M</u> erge	Block Enroll Detail	Block Enrl Detail1	Block Er	nrl De <u>t</u> ail2			
ment Reques	t ID: 0000233074	-					
		Po	reopolize E	ind View All L	71	Eiret 4 15	of 5 🚯 Last
ID	Name	Term	Career	Class Nbr	Action	Status	DETAIL
26	Lí,	2168	GRAD	33331	Enroll	Errors	DETAIL
26	P	2168	GRAD	33331	Enroll	Errors	DETAIL
26	L	2168	GRAD	33331	Enroll	Errors	DETAIL
26	D	2168	GRAD	33331	Enroll	Errors	DETAIL
26	F	2168	GRAD	33331	Enroll	Errors	DETAIL
	10 26 26 26 26 26	ID Name 2€ L 2€ L 2€ L 2€ D	ID Name Term 2€ L 2168 2€ L 2168	ID Name Term Career 2ć L 2168 GRAD 2ć L 2168 GRAD 2ć D 2168 GRAD 2ć L 2168 GRAD 2ć D 2168 GRAD 2ć L 2168 GRAD	ID Name Term Career Class Nbr 2ć L 2168 GRAD 33331 2ć L 2168 GRAD 33331	ID Name Term Career Class Nbr Action 2ć L 2168 GRAD 33331 Enroll 2ć L 2168 GRAD 33331 Enroll 2ć L 2168 GRAD 33331 Enroll 2ć D 2168 GRAD 33331 Enroll 2ć L 2168 GRAD 33331 Enroll 2ć L 2168 GRAD 33331 Enroll	ID Name Term Career Class Nbr Action Status 2€ L 2168 GRAD 33331 Enroll Errors 2€ D 2168 GRAD 33331 Enroll Errors

- **42.** Another error example is that the student may not meet the reserve capacity requirement group set for the class. Select the **Closed Class** override and then **Save** to resolve this.
- **43.** Repeat steps **36.–40.** until errors have been resolved.

Overrides						
Access ID: Action Date Appointment Career Dynamic Dates	Total Access	Closed Class	Grading Basis Permission Requisites	Service	onflict ad	
Messages			Find I View All	First	1 of 1	E Last
Available seats are selecting the "Wait!	subject to rese subject to rese ist Okay" check	rve capacity requirements. If a box and re-submitting the enr	Lost Update DateTime: 08/2! et. Student not enrolled. (14640.213) a waittist is available, you may place the s oilment request. If you have proper acces Class" checkbox and re-submitting the er	tudent on th	e waitlist b werride th	

NOTE:

A user's security level may prohibit the resolution of certain errors (Term Activation, Class Closed, Unit Load, etc.). If you encounter an error you are unable to resolve, please refer to Support details at the bottom. Make certain to include the **Enrollment Request ID** in the details of your message.

- 44. Return to the **Block Enroll** Merge tab to resubmit the enrollment requests previously in "Error" status.
- 45. Select Submit.

Block Enroll Merge Blo	ck Enroll <u>D</u> etail	Block Enrl D <u>e</u> tail1 Block Enrl	Dețail2	
Enrollment Request ID:	0000232935	Request Status:	Pending	Submit
Merge Blocks				
Academic Institution:	UCB01	UC Berkeley		
Student Block:				Merge
	Detail / Create			
Class Block:				
	Detail / Create			
Filtering Criteria				
Academic Career:	Q			Retrieve
Term:	Q			
Class Nbr:	Q	Detail Status: Errors	Ŧ	
Empl ID:		Q		
Return to Se	earch 🔄 Notify	C Refresh		📑 Add 🗵 Update/Display
Block Enroll Merge Block En	roll Detail Block Er	nrl Detail1 Block Enrl Detail2		

46. A **Request Status** of "Success" or "Message" indicates that the enrollment requests have been successfully submitted.

Block Enroll Merge	Bloc	k Enroll <u>D</u> etail	Block Enri	Detail1	Block Enri	De <u>t</u> ail2	
Enrollment Request	ID:	0000232935		Reque	st Status:	Success	Submit
Merge Blocks							
Academic Institution	1:	UCB01	UC Berk	eley			Merge
Student Block:							

Support:

For questions or assistance, please contact SIS Production Support:

- Email: <u>sishelp@berkeley.edu</u>
- Call 510-664-9000 (press option 6)

For additional SIS resources, please visit:

• <u>http://sis.berkeley.edu/training</u>