Block Enrollment User's Guide

Contents

Summary

The Block Enrollment process allows users to create a Class Block with one or more classes, create a Student Block with one or more students, and then the functionality to merge the enrollment request and submit to process. The retrieve functionality allows the user to pull up the results containing successes, messages and/or errors.

Registration Services staff could use block enrollment when fixing a list of enrollments.

Registration Services is responsible for training campus on Block Enrollment.

Objectives

At the conclusion of this training, you will be able to:

- Create a student block
- Create a course block
- Merge the student block with the course block
- Handle overrides for students in a block enrolled class
- Retrieve the results of the block enrollment process
- Search for previously processed block enrollments

Office of the University Registrar

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Block Enrollment Background

The Block Enrollment feature used by the ConnectCarolina system allows authorized UNC-CH staff to:

- Create a block of students using their PIDs
- Create a block of one or more classes
- Merge the two to create a single enrollment request

This process can be used instead of the one-by-one approach used in Quick Enroll.

After merging a student block with a course block, you can retrieve and review the details resulting from the enrollment request and adjust any enrollments that were not successfully processed.

Block Enrollment Naming Convention

IMPORTANT: The Naming Convention used for Block names is not controlled by security.

1. Block Names are viewable/editable by all users on campus.
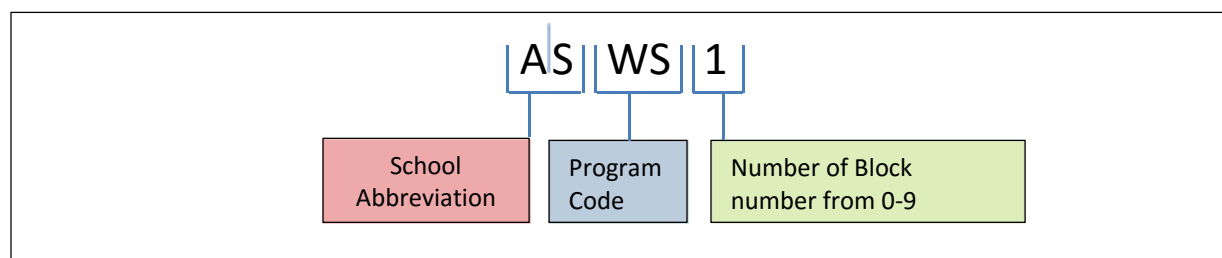2. Block Names are not deleted through any regular cleanup process.

These two conditions make it important for everyone to:

1. Use a consistent naming pattern.
2. Minimize the number of blocks created.
3. Re-use existing blocks that you yourself have created from one term to the next.

Block names are restricted to five (5) characters.

Registration Services staff should use the standard naming convention of OUR plus your initials. For example, if my initials were HD, my block would be OURHD. Use the same naming convention for your class and student blocks.

When training campus users on creating blocks, we ask that they follow this standard naming convention:

When creating your blocks, use your School abbreviation as the first two characters.

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Example:

If your department is in the College of Arts and Sciences, your block will begin with **AS**. If you are in the School of Public Health, your block will begin with **PH**.

These are the same abbreviations used for student Programs, such as **ASBA** or **PHMPH**.

The second two characters in the block name should represent your program, and the last character will be a number. This number can be from 0 to 9.

Example:

If you are creating a single block for the Women's Studies program, the name would be **ASWS1**. If the MD program within the Medical School needed 9 blocks, they would be named **SMMD1**, **SMMD2**.

You can enter more specific information, such as the term, in the block description. The description can be changed at any time.

Outline of Block Enrollment Process

Step 1: Create a Class Enrollment Block

Step 2: Create a Student Block

Step 3: Merge the Class Enrollment and Student blocks

Step 4: Review the Results of the Merge

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Step 1 -- Create a Class Enrollment Block

Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block.

1. Navigate to the **Create Class Block** page.

2. Click the **Add a New Value tab**.

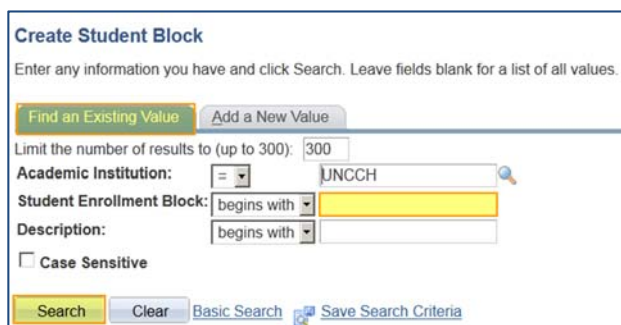3. Enter a name for the new class enrollment block.

4. Click the **Add** button.

Note: If a block exists by the name you enter, you will be notified and given the option to proceed or choose a different name.

Important: To reuse an existing class block, from the **Find an Existing Value** tab, enter a name for the new block, and click the **Search** button.
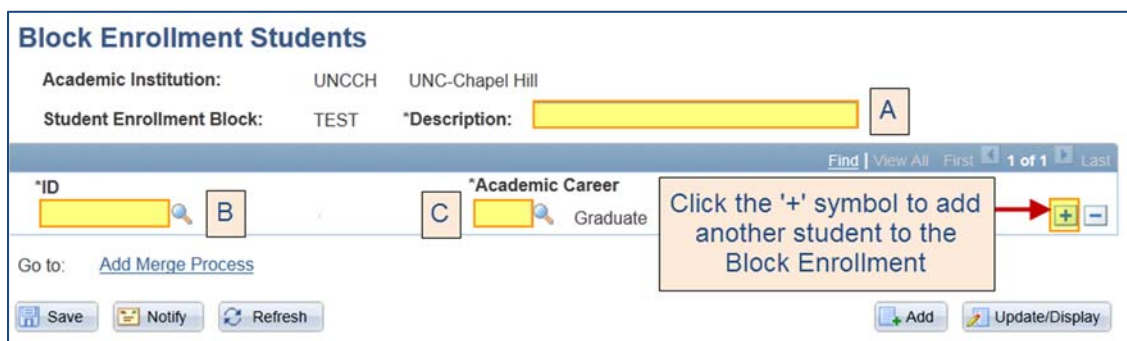
If you do not remember the name of a previously created block, type your School abbreviation (*AS, PH, etc.*) into the Class Enrollment Block field and click the **search** button.

This will display the list of all blocks associated with your school abbreviation.

5. Complete the required fields on the Create Class Block screen. (*If reusing a block, delete out the information first, and start re-enter with the new information*.)

    A. Enter a description of the new block.
    B. Enter the term.
    C. Lookup the course number (same as in Quick Enroll).
    D. Check for overrides.
        • If the class requires **permission**, we recommend that you check 'Class Permission at this point.

        • If the class is full or has a **reserve capacity** that you want to override, check 'Closed Class' at this point. Note that if you check this, you will override the enrollment limit and reserve capacity for all students in the student block.

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6. You can add additional courses to the block by clicking the **+** button.

7. Click the **Save** button when finished configuring the class enrollment block.

Step 2 -- Create a Student Block.

Records and Enrollment >> Enroll Student >> Block Enrollment >> Create Student Block.

1. Navigate to the **Create Student Block** page

2. Click the **Add a New Value** tab.

3. Enter a name for the new Student block.

Use the same naming convention for the student block as you used for the class block.

Note: *If a block exists by the name you enter, you will be notified and given the option to proceed or choose a different name.*

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Important: To reuse an existing student block, from the Find an Existing Value tab, enter a name for the new student block.

If you do not remember the name of a previously created block, type your School abbreviation (*AS, PH, etc.*) into the Student Enrollment Block field and search.

This will display the list of all blocks associated with your school abbreviation.

Create Student Block

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	Add a New Value

Limit the number of results to (up to 300): 300

Academic Institution: [= ▾] UNCCH

Student Enrollment Block: [begins with ▾] [ ]

Description: [begins with ▾] [ ]

☐ Case Sensitive

[Search] [Clear] Basic Search Save Search Criteria

4. Add Students to the block

   A. Enter a description of the new block.
   B. If you are reusing a block, delete all previous rows of student PIDs (Use the **-** button).
   C. Click the **+** sign to add new rows for each additional student PID.

Block Enrollment Students

Academic Institution: UNCCH   UNC-Chapel Hill

Student Enrollment Block: TEST   *Description: [ ] A

Find | View All   First ◄ 1 of 1 ► Last

*ID [ ] B   *Academic Career C [ ] Graduate

Click the '+' symbol to add another student to the Block Enrollment → [+] [-]

Go to: Add Merge Process

[Save] [Notify] [Refresh]   [Add] [Update/Display]

Note: Do not use the Lookup icon for ID. The search will take too long, as it scans the entire PID database.

5. Click the **Save** button when finished configuring the class enrollment block.

6. Locate the **Add Merge Process** link to begin merging the class block and the student block.

Alternate Path: *Records and Enrollment >> Enroll Student >> Block Enrollment >> Block Enroll Merge*

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Step 3 – Merge the Class block with the Student block

1. Use the **lookup icon** 🔍 to find the name of the student block and the class block.

2. Click the **merge** button.

3. Click the **submit** button.
   This will process the enrollment request.

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Step 4 – Review the results of the enrollment

1. To review the results of the enrollment, click the **Retrieve** button.

2. The retrieve function will display a **summary status** for each student in the **Block Enroll Detail** tab. It provides the same information as the **Quick Enroll** process.

3. Make sure to record the **Enrollment Request ID** number for future reference.

4. Check the **Status** column to determine if the merge was a success or if there are errors present. If the status is **Success** or **Messages**, the enrollment request was successful. If the status is **Errors**, the enrollment request was not successful.

5. To review the detailed information on each student's enrollment click the **Detail** link on the right of the screen.

6. The **Block Enroll Details** screen will display information about the merge.

7. Locate the **Messages** area to view a detailed explanation of the result of the merge.

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8. **Resolve** any enrollment errors, if appropriate.

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How to Resolve Errors

If you receive errors in the status field after a merge you will need to:

1. Click on the **DETAILS** from the retrieve results page.
2. Check the **override** that is appropriate to resolve the error and save.
3. Go to the **Block Enroll Merge** tab, and resubmit the request by clicking the **Submit** button.
4. **Retrieve** the results of the request.

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Enrollment Overrides

Enrollment override access and use will be similar to Quick Enroll. See the Registration Drop/Add procedure for more information on overrides.

Adding Students to a Block Using Population Selection

Sometimes it is necessary to add a large number of students to a block. An easy way to do this is by using the Population Selection tool.

1. Go to **Create Student Block** as if you were going to manually enter students.
2. Make sure that there are no students in the block.
3. Select the **Population Selection** box on the Student Block. The Population Selection box will then expand to show additional options.

4. Select **External File** in the **Selection Tool** box. Click the Upload button when it appears to select an external file to upload.

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Block Enrollment Students

Academic Institution: UNCCH   UNC-Chapel Hill

Student Enrollment Block: *Description: Registrar Block Enroll   Clear

Find | View All | ⧉ | ▦   First ◄ 1 of 1 ► Last

	*Empl ID	*Academic Career		
1	🔍	🔍	⊞	⊟

Population Selection

☑ Population Selection

Selection Tool: External File   ▾

Attached File: Upload File   Delete File   View File

File Mapping: 🔍

    Fill Student Block

Go to: Add Merge Process

🖫 Save   🔍 Return to Search   ✉ Notify   ⟳ Refresh   ➕ Add   ▣ Update/Display

	A	B
1	7XXXXXXXX	UGRD
2	7XXXXXXXX	UGRD

5. Choose a .csv (comma-delimited) file to upload. This file should contain the PIDs and academic career codes for the students being added. The PID should be in the first column and the academic career code should appear in the second column. Make sure to save the file as a .csv and do not use column headings.

6. Select **BLOCKENROLLSTUDENTBLOCK** in the **File Mapping** box.

7. Click the **Fill Student Block** button, and then save the Student Block. When you click Fill Student Block, the PIDs and career codes for the students in the .csv file you uploaded should appear in the box above the Population Selection box.

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