This playbook was developed as a resource for Student Services Managers as part of the Operational Excellence Course Setup Project. It is not a complete guide to course setup - yet, but the Office of the University Registrar, in collaboration with the Office of Undergraduate Curriculum, will continue adding content to make this a comprehensive resource for Student Services Managers.
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Course Setup Overview

• SSM Course Setup Activities: CSM & Extended CSM
• Year at a Glance Timeline & Tasks
Course Schedule Maintenance (CSM)

The time when Department SSMs have full scheduling access in ConnectCarolina

CSM Activities

• Review rolled sections (prior fall semester is copied to the future fall, etc.). This prevents SSMs from having to re-enter data.

• Cancel any sections that won’t be used. An opportunity to cancel any rolled courses no longer needed.

• Update these data fields on sections:
  • Mode of instruction
  • Section and class numbers
  • Meeting pattern (days and times)
  • Instructors
  • Consent flags
  • Enrollment capacities
  • Reserve capacities
  • Class notes

• Add new sections to the schedule.

• Make sure combined sections have rolled and are set up correctly

• Make sure non-sponsor units open/close their sections according to combined section offerings for the new term

• Assign any department priority classrooms in 25Live

• For Fall semesters, begin planning for new First-Year seats and new transfers seats to be entered in the customized MOI and Reserve Capacity page when opened.
Extended CSM

The time when Department SSMs have limited scheduling access in ConnectCarolina

Extended CSM Activities

• Update these data fields on scheduled sections:
  • Instructors
  • Consent flags
  • Class notes
  • Enrollment capacities (must fit assigned room)
  • Reserve capacities

• Submit requests to the scheduling team via Formstack
  • Add or cancel sections
  • Change meeting pattern
  • Change room

• Submit requests to change Mode of Instruction via the MOI & Reserve Capacity page in ConnectCarolina
  • Must be approved by the senior associate dean for the division or dean of the school

• Add any last-minute sections

• Cancel sections due to changes in instructor availability

• Add grad-student teaching assistants to their sections

• Adjust enrollment capacities based on pre-enrollment data or changes to instructor availability
## Course Setup – Year at a Glance Timeline

Specific dates available on the [Course Schedule Maintenance Timeline](#)

<table>
<thead>
<tr>
<th>Term</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
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<td></td>
<td>CSM</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>OUR Assigns Rooms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>CSM</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Extended CSM</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spring</td>
<td></td>
<td>CSM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OUR Assigns Rooms</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Extended CSM</td>
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<td></td>
<td></td>
<td></td>
<td>Extended CSM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Summer</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>CSM</td>
<td></td>
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<tr>
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<td></td>
<td>Extended CSM</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ext. CSM</td>
<td></td>
</tr>
</tbody>
</table>

Begin course planning for the term
<table>
<thead>
<tr>
<th>Month</th>
<th>Fall CSM ends</th>
<th>College calls for new First-Year and new transfer seats to be set aside before Fall continuing registration begins</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td></td>
<td>Add Fall NSSR, FYPR &amp; TRF seats, along with expected enrollment for FDOC, to the custom MOI &amp; Reserve Capacity Page in ConnectCarolina</td>
</tr>
<tr>
<td>March</td>
<td></td>
<td>Fall Extended CSM begins and runs through the end of the registration period</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continuing student registration opens for Fall</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continuing student registration opens for Summer</td>
</tr>
<tr>
<td>April</td>
<td></td>
<td>Spring CSM begins - start planning for Spring term</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Seat release occurs for Spring</td>
</tr>
<tr>
<td>June</td>
<td></td>
<td>Continuing registration ends for Fall; ConnectCarolina is shut down for new student registration</td>
</tr>
<tr>
<td>July</td>
<td></td>
<td>Spring CSM ends</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fall new student registration/seat release begins and continues through the end of new student registration</td>
</tr>
<tr>
<td>August</td>
<td></td>
<td>New student open enrollment followed by all open enrollment</td>
</tr>
<tr>
<td>September</td>
<td></td>
<td>Spring Extended CSM begins</td>
</tr>
<tr>
<td>October</td>
<td></td>
<td>Fall CSM begins - start planning for Fall term, including New First-Year and transfer seats</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer CSM begins - start planning for Summer term</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student registration opens for Spring</td>
</tr>
<tr>
<td>November</td>
<td></td>
<td>Summer CSM ends</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spring seat release happens on Fall LDOC</td>
</tr>
<tr>
<td>December</td>
<td></td>
<td>Summer Extended CSM begins</td>
</tr>
</tbody>
</table>
Overview of Options for Controlling Enrollment

- Reserve Capacities
- Instructor or Department Consent (Permission Numbers)
- Pre-Requisites and Co-Requisites
Overview of Options for Controlling Enrollment

There are three major categories of options for controlling course enrollment in ConnectCarolina. Each option has benefits and constraints, which are described in the following sections.

<table>
<thead>
<tr>
<th>Reserve Capacity</th>
<th>Instructor or Dept Consent</th>
<th>Pre-Requisites &amp; Co-Requisites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use when trying to set aside a portion of a course for a specific population</td>
<td>Use when the whole course is being vetted by the instructor or dept for enrollment</td>
<td>Use to set the academic requirements for a course</td>
</tr>
</tbody>
</table>

These methods can be used independently, but there are times when multiple options might be used, based on the needs of the dept and the timing in registration.
Reserve Capacities

- Definition & Application
- Benefits
- Student Experience with Reserved Seats
- Process: Reserving Seats for Continuing Students
Reserve Capacities

**Definition & Application**

- A Reserve Capacity is a specific population (defined by a plan, class, major, etc.) that you want to reserve seats for
  - You may see or hear reserve capacities referred to as reserve caps or abbreviated as RC.
- Reserve Capacities should be used when trying to set up aside a portion of a course for a specific population.
- You can define any number of reserve capacity groups for a class.
- Reserve Capacity functionality allows you to automate opening and closing the date ranges during which various student populations can enroll in each class section.
- When a student enrollment request is processed, ConnectCarolina will automatically search through the reserve capacities (in sequential order) and place the student in the first group of reserves with an available spot the student qualifies for.

**Example**

- Psychology 210 wants to reserve 50 seats for majors in the 100-person class.
- During registration, when a Psychology major tries to register for PSYC 210 they will automatically take a seat in the 50-seat major reserve.
- If a student is not in the reserve group, they are eligible for one of the other non-reserved seats
Reserve Capacities

Benefits

- Utilizing reserve capacities allows departments to manage enrollment in specific courses for special populations. (i.e., majors, minors, transfers, new students, etc.)
- The automatic process to release seats removes the manual efforts of many departments.
- Having the automated process ignore LDOC allows departments that would like to hold seats longer to do so.
- As we are trying to create transparency for students, the automatic process removes the need to keep ‘1’ seat in the reserve to cancel out the reserve. This allows for the right number of seats to be shown to students during registration.
Information about reserved seats will be available to students for the first time in 2023 spring term registration.
Class Section Status Icon for Reserved Seats

New for Spring 2023 registration

- “Only reserved seats available” icon – purple diamond
- Visible in Class Search and Shopping Cart
- “Closed” icon changed from a blue square to a red square
Reserve Capacity Naming Convention

Short Description Naming Convention

- UG or GR
- 4 letter major abbreviations
- Spell out other groups as much as possible
- Major, Minor, Maj/Min

Examples

<table>
<thead>
<tr>
<th>Long Description</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russian Culture Minor students only</td>
<td>UG Russian Culture Minor</td>
</tr>
<tr>
<td>Undergraduate Media and Journalism students</td>
<td>UG MEJO Maj/Min</td>
</tr>
<tr>
<td>UGRD BUSI or BUSV Majors Foreign Exchange students</td>
<td>UG BUSI Major Exchange</td>
</tr>
</tbody>
</table>
The Class Availability section of the Class Details page lists the number of seats reserved for specific populations. If you hover over the abbreviation, a longer description is displayed and you can determine if you are in that population.

- For example, in the below picture you see “UG EXSS Majors.” If you hover over the abbreviation the long description appears as “Undergraduate Exercise and Sport Science Majors.”

<table>
<thead>
<tr>
<th>Seats</th>
<th>Open/Total</th>
<th>Reserved Seats</th>
<th>Open/Total</th>
<th>Waitlist Seats</th>
<th>Open/Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Unreserved Seats</td>
<td>0/0</td>
<td>UG EXSS Majors</td>
<td>12/35</td>
<td>Waitlist</td>
<td>0/0</td>
</tr>
<tr>
<td>Open Reserved Seats</td>
<td>12/35</td>
<td>Total Reserved Seats</td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Seats</td>
<td>35</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The error message students receive if they are not able to enroll because they don’t meet the reserve requirement has been updated for clarity and to provide direction.

<table>
<thead>
<tr>
<th>Previous</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are unable to enroll in this class at this time. Available seats are reserved and you do not meet the reserve capacity requirements.</td>
<td>You are unable to enroll in this class at this time. Available seats are currently reserved and you do not meet the reserve requirements. See class detail page for more information.</td>
</tr>
</tbody>
</table>
Reserving Seats for Continuing Students

The following resources cover how departments can reserve seats for continuing students in ConnectCarolina. There is a separate process for new students.

- Overview & Tips
- Run Concurrent Reserve Capacities
- Create a single reserve capacity sequence
- End a Reserve Capacity
- Set up consecutive reserve capacities
- Seat Release Process
Overview & Tips

ConnectCarolina pathway

- Main Menu
- Student Admin menu
- Curriculum Management
- Schedule of Classes
- Maintain Schedule of Classes
- Populate Class Search
- Reserve Cap tab

- Always ensure that the **Start Date** value is no later than the date registration opens (unless part of a consecutive reserve capacity situation).
- There is no longer a need for depts to release seats. This is done automatically through a cybermated process.
- Reserve capacity requirement groups can run:
  - in chronological order (consecutively), which requires only **one** reserve capacity sequence, and/or
  - concurrently-two date sets running at the same time or overlapping each other—which requires **two** reserve capacity sequences.
- Use consecutive or concurrent reserve capacities but not both.
Create a single reserve capacity sequence

1. Select a group or plan by clicking the **Requirement Group Look Up** button and selecting the item you require.

Use the Description drop down box to quickly narrow your search. Select "contains" and type a portion of a word such as "anth" if you're looking for anthropology.
Create a single reserve capacity sequence

2. In the Start Date field, enter the date on which the selected requirement group should begin enrolling for the class.

   Starting a reserve cap after registration opens allows students outside the selected group to register for the class before that date.

3. In the Cap Enrl field, type the enrollment cap value to assign to the designated group.

4. Click Save to save the group. If you've reserved the entire enrollment cap for one group, you're finished entering data on the Reserve Cap tab.

A reserve cap does not have to match the enrollment cap of the class. You can ‘save’ any number of seats up to the max enrollment. Other seats will be open to anyone or to another reserve capacity.
Set up Consecutive Reserve Capacities

Click the **Plus (+)** button adjacent to the **Cap Enrl** field to add a row for a second requirement group. A second row appears.

Follow steps for creating a single reserve cap for the second requirement group, ensuring that when added together the enrollment for the two groups does not exceed the total enrollment cap.

In this consecutive RC sequence, all 50 seats are held for ANTH majors beginning at 11:59pm on 4/09/19 (this date is before any registration begins). On 4/23/19 no more seats are held for Anth majors. Of the seats remaining, 10 are held for ANTH minors.
Run Concurrent Reserve Capacities

To have more than one reserve capacity run concurrently

Use the PLUS (+) button to create a Reserve Capacity Sequence 2

Add your second reserve capacity requirement group

Looking at “View All” you can see both reserve capacities.

Use consecutive or concurrent reserve capacities, but not both
End a Reserve Capacity prior to LDOC

Separate from the automated seat release process described on the next page

1. Create the second group using the same Requirement Group you used for the first group.
2. Set the Cap Enrl field's value to zero (0). Doing so allows the remaining seats to become available to anyone when the second group's date becomes current.
3. Always click SAVE!

Using a zero (0) on any reserve capacity ends all the reserve caps on a class, even if they are on separate sequences!
Departments add reserve capacities prior to registration

The seat release process runs on LDOC and releases open reserved seats

If depts want to reserve seats after LDOC: Add another row using the LDOC date as the start date with the number of seats to reserve.

The process runs every 5 minutes throughout open enrollment to continue releasing open reserved seats, ignoring rows with an start date of LDOC.
Seat Release Process

1. Departments add reserve capacities prior to registration

Example
- The Classics (CLAS) department put a reserve capacity on CLAS 131.001 in the Spring term.
- 15 seats were put aside for students in the Classical Humanities Minor (CLAH)
Seat Release Process

The seat release process runs on LDOC of the previous term at 12:01am.

It releases open reserved seats by matching the capacity enrollment to the number of students enrolled under it.

Example

- On Fall LDOC the seat release process runs and identifies 7 students that enrolled through the RC. The process adjusts the seat reserve capacity to match.
- The reserve capacity is changed from 15 to 7, 7 being the students that enrolled in the reserve cap, essentially releasing all open reserved seats (8 seats) to all students.
Seat Release Process

3. If depts want to keep seats in reserve and not release them on LDOC:

Add another row using the LDOC date as the start date with the number of seats to reserve.

This can be done at any time prior to LDOC.

Example
- The dept adds a row with LDOC as the start date, reserving 8 seats
Seat Release Process

Starting on LDOC the process runs every 5 minutes throughout the registration period to continue releasing reserved seats dated prior to or after LDOC. The process ignores reserve capacities with LDOC as the start date.

Example
When the department does NOT want to continue reserving seats after LDOC
- If 1 of the 7 students in the original reserve capacity drops the class
- The seat release process identifies 6 students that enrolled through the RC and adjusts the seat reserve capacity to match. The open seat is released to all students.
Instructor or Dept Consent (Permission Numbers)

- Definition & Application
- Benefits
- Process
Instructor or Dept Consent

Definition & Application

• Instructor or Department consent should be used when the **whole course** is being vetted by the instructor or department for enrollment.
  • Enrollment is managed by unique permission numbers the instructor or department issues to the students to allow enrollment in the class.

• This consent can be placed prior to registration or at any point throughout registration.

• Once consent is placed on a section, students can only enroll via a unique permission number generated by the Registrar and distributed by the faculty or department.

• These types of consent are placed on the section level of the course by the department.

**Examples** of courses that might utilize instructor or department consent

• independent study
• special topic
• pilot course with enrollment vetting needed
Instructor or Dept Consent

Benefits

• Utilizing instructor or department consent allows for departments to manage enrollment in specific courses for special populations that cross multiple-discipline, academic and professional paths.

• Instructor or department consent can be put on a course at any point during registration. Once consent is placed, all open seats must be managed through permission numbers (this includes reserve seats).

• This is a manual process on departments but does allow for a level of vetting necessary in some courses.

• All students needing to enroll will need to speak with the instructor or department as designated. This makes the ‘way the student enrolls’ transparent.
Instructor or Dept Consent

**Process**

The department places Instructor/Department Consent on the course.

ConnectCarolina Pathway

- Curriculum Management
- Schedule of Classes
- Maintain Schedule of Classes
- Populate Class Search
- Enrollment Control Tab
  - Add Consent dropdown
  - Select Department or Instructor Consent
  - Save
Instructor or Dept Consent

**Process**

- The dept requests permission numbers be generated for a specific class via the [formstack form](#) and shares semester, class, section, and total number of permission numbers needed.
  - The permission numbers only over-ride instructor or department consent unless otherwise specified.
  - Upon request, permission numbers can be set up to over-ride consent, pre/co-requisites, reserved seats, and class capacities.
- Once permission numbers are generated, they are shared with the requesting dept to distribute to individual students as needed.
- Students will need to use the unique permission number when registering for the course.
  - Once a permission number is used by a student, it can’t be used again. If a student drops the course, they will need to be issued a new permission number.

The Registrar’s Office has training materials on how students use permission numbers.
Pre-Requisites and Co-Requisites

- Definition & Application
- Benefits
- Process
Pre-Requisites & Co-Requisites

Definition & Application

- Pre-requisites and co-requisites should be used to set the academic requirements for a class. They are courses that need to be taken prior (pre-requisite) or at the same time (co-requisite) to enroll in the course.
- When a student enrollment request is processed, ConnectCarolina will automatically search the pre-requisite or co-requisite to ensure the student qualifies for the course based on courses taken or currently enrolled in.

Example

- To register for COMP 210, a student must meet the prerequisites of COMP 110 and MATH 231 AND OR Pre- or corequisites, COMP 283 or MATH 381.
- If the student is trying to enroll in COMP 210 for the spring, the student could be enrolled in any of the above courses the fall prior and could register for COMP 283 or MATH 381 at the same time as COMP 210.
Pre-Requisites & Co-Requisites

Benefits

• A pre-requisite ensures a student has the appropriate knowledge when entering the subsequent course.

• Automatically controls enrollment; if a student does not have a stated pre- or co-requisite ConnectCarolina will not allow the student to enroll.
Pre-Requisites & Co-Requisites

**Process**

- Depts should set up pre- or co-requisites when developing a new course.
- This info is added into CIM (Course Inventory Management) and is then reviewed and approved by the appropriate dept and college curriculum committees.
  - Changes to add new or remove existing pre- or co-requisites should be approved by the dept and processed through CIM.
- If a course should be for only majors (never will someone outside the major enroll), this can be added to the pre- or co-requisite; however, **this will need to be approved by the College or professional school Dean** because
  - Often other depts will use courses that are put aside for majors as related, minor, other.
  - By leveraging a major in a pre- or co-requisite you could be limiting opportunity.