Coursedog

Preparing for a New Term
Academic Scheduling Admin Guide

**Find more resources at
Coursedog.freshdesk.com**

Preparing for a New Term

Reference the below checklist and related instructions to prepare for a new term in Academic Scheduling. Please note, this guide follows Coursedog's recommended integration strategy. Your institution's integration strategy may differ slightly from this standard approach. If that is the case, the end of this document outlines your specific merge settings and strategy.

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- ❏ Validate your new term data in Coursedog.
- ❏ Review & update term-based configurations.
- ❏ Review & update workflows.
- ❏ Schedule in Coursedog!
- ❏ Resolve merge errors regularly.
- ❏ Post/publish term to SIS & view integration status.

General Best Practices

- ☐ Inform your Coursedog Customer Success Manager when you are preparing for a new term and are performing the rollover; this allows them to be engaged and ready to assist if needed.
- ☐ Keep your staging environment up to date. Use the end or start of a new term as a point in your process to ensure data and settings are current. Out-of-date staging environments can lead to false confidence when testing new features, new integration enhancements/scripts, etc. If your business practices, processes, etc. have changed, the tests run in staging will not be reflective of the environment rolled out to production.

Term Rollover Options

- Although two rollover options are presented below, if you can perform the rollover in your SIS (Option 1), you should.
- The rollover functionality in Coursedog is only intended for schools who do not have this option in their SIS.
- If your SIS offers rollovers, but you roll in Coursedog, this could put your schedule at risk of not containing – and even wiping – information that is not owned or merged with Coursedog but only found in your SIS.

Option 1: Student Information System (SIS) Rollover

- The first step when preparing to schedule a new term is to create the new term in your SIS and perform a rollover in your SIS.
- The Term Roll Process is used by most SIS providers to move section data from one term to another. This process will typically copy the schedule from one term to a new term that does not contain any scheduling information.
- For specific instructions regarding rolling a term in your SIS, please refer to the documentation provided by your SIS.
- There are many required business processes covered by an SIS rollover, in which case this option (Option 1) will be the correct path for most integrated schools.
- Plan at least one week in advance of scheduling to start the rollover process, as it can take some time to pull the data in.
- Once the rollover is performed, it should be available to add to your platform the next day, provided you have nightly merges enabled.

Option 2: Rollover in Coursedog (Limited Use Case)

- For some Coursedog clients – including those with a homegrown SIS or no rollover capability in their SIS – rollover is available within the Coursedog platform.
- Available rollovers include Sections, Instructor Preferences, and Relationships.
- If it's determined you can safely proceed with Option 2, some of the directions in this guide won't pertain to you; you can learn more about Coursedog rollovers here.

Merge New Term Data into Coursedog

Overview

In order to start scheduling, you will need to add/ensure the upcoming term (newly rolled from your SIS) exists within Coursedog, and that Coursedog is configured to pull data from your SIS.

Coursedog Support

Given the complexity of the processes captured in this section, we recommend you submit a ticket to our technical support team for assistance in reviewing and updating merge settings, type-specific settings, and executing an initial manual merge. Please allow a one-week turnaround from submission of your ticket.

Review / Update Merge Settings (Coursedog Assisted)

Overview
- The below steps outline the process for reviewing and updating merge settings.
- When a setting is toggled to "Yes", that is the same thing as enabling or "turning on" the setting.
- For information on standard integration configuration practices for Academic Scheduling, refer to this article.
- You can have Merge Settings "Saved States" or saved states aligned to Phases. Be sure you fully understand the current state and the onboarding decisions made before making changes. You can learn more here – or reach out to your Coursedog Customer Success team.

How To Do It

Step 1: Navigate to Admin > Merge Settings.

Step 2:
- Navigate to the "Merge Types" header.
- Ensure the regular synchronization of non-term-specific data (realtime or nightly depending on your SIS and institution's choices made during onboarding) is set to "Yes", so that Coursedog is always up to date.
- Non-term-specific data includes professors, rooms, departments, terms, and buildings.

Step 3:
- Also under "Merge Types", ensure settings for term-specific data align with your institution's preferences.
- Term-specific data includes courses, courses (Curriculum), relationships, and sections.
- These might be set to "yes" or "no" depending on how your institution decided to handle this data during onboarding.
- If your institution uses regular (real-time or nightly) merges, set these to "yes".
- If your institution uses manual merges, set these to "no" for the time being and perform the manual merge execution outlined below.

MERGE TYPES		ENABLED
Courses		YES **NO**
Relationships		YES **NO**
Sections		YES **NO**
Courses (Curriculum)		YES **NO**
Professors		**YES** NO
Rooms		**YES** NO
Departments		**YES** NO
Terms		**YES** NO
Buildings		**YES** NO

Step 4: Ensure settings for "Nightly Integration Schedule" and "Real-time Integration Schedule" align with your institution's preferences.

Nightly Integration Schedule
These settings will apply to all nightly integrations, regardless of the enabled integration save state.

Should merges run nightly?

YES **NO**

If yes, merges for enabled merge types will be executed each night.

Real-time Integration Schedule
This schedule will apply to all realtime integrations, regardless of the enabled integration save state.

Should merges run in real-time?

YES **NO**

If yes, updated Coursedog data for enabled merge types will be synced back to the SIS according to the specified schedule.

CONFIGURE MERGE SETTINGS OVERRIDES

Overrides set here will only run for realtime integrations

Step 5:
- Under "Integration steps to execute", ensure your settings match what is shown below.
- There are a few exceptions to the below settings:
  1. "Should Coursedog allow empty datasets" should be set to NO *unless* you are working with a special saved state or manual merge.
  2. "Should Coursedog send updates to the SIS?" should be:
     a. Set to YES for Relationships and Sections. Courses (Curriculum) should also be set to YES provided you have Curriculum Management; your SIS

integration supports it; and you've opted to do a bi-directional integration for curriculum courses.

    b. Set to NO for Courses, Professors, Rooms, Departments, Terms, and Buildings.

3. "Should Coursedog verify updates sent to the SIS persisted?" is generally YES, but there are SIS-specific exceptions like PeopleSoft. If you are unsure, reach out to Courseodog to confirm the proper setting.

Run a Terms Merge

Overview
- You'll likely need to run a terms merge to pull the new term in.
- The new term might have already been pulled in *if* you created the term in your SIS and the nightly terms merge is running.
- If your nightly terms merge isn't running and/or if the new term was added after the last merge, you will need to run a manual terms merge.

How To Do It

Step 1:
- Navigate to Academic Scheduling > Terms to confirm whether or not the new term already exists in Coursedog.
- Search for the new term in the table.
- If the new term appears in the table, you're all set.
- If the new term *doesn't* appear in the table, proceed to Step 2.

Step 2:
- Navigate to Admin > Execute Merge.
- Under "Select Type", select "Terms" from the dropdown menu.

Step 3: Click "Execute".

Review / Update "Type-Specific Settings - Sections" (Coursedog Assisted)
PATH: Admin > Merge Settings

Step 1: Navigate to the "Type-Specific Settings - Sections" area of Merge Settings.

Step 2:
- Add the upcoming term to the "Only run integrations for selected terms" field for Courses, Sections, and Relationships.
- Remove any old terms that should no longer be running.

Execute Manual Merge - Section Data (Coursedog Assisted)

Overview

- You will need to run a manual merge to pull in the section, course, and relationship data for the new term, with "Allow empty datasets" toggled to "Yes".
- Make sure you are on the correct path before you begin. All of the below steps should be followed under "Execute Merge" and never in the general "Merge Settings" screen.

How To Do It

PATH: Admin > Execute Merge

Step 1: Select "Sections" from the "Select Type" dropdown menu.

Step 2: Select the new term from the "Select Term" dropdown menu.

Step 3:

- Scroll down to "Integration steps to execute".
- Ensure "Allow empty datasets" is toggled to "Yes".
- Ensure "Should Coursedog send updates to the SIS?" is toggled to "No" (this will allow you to pull data into Coursedog without posting anything back to your SIS).
- Setting "Should Coursedog send updates to the SIS?" to "No" should be a one-time occurrence for the term. Before you start making scheduling changes/updates in Coursedog, you will want to change this setting to "Yes". If you don't do that, you will lose any scheduling changes that you have made in Coursedog.

Step 4: Click "Execute".

Step 5: Repeat Steps 1-4 for courses and relationships.

Execute Manual Merge - Courses (Curriculum)

Overview
You will need to run a similar manual merge to pull in the courses (curriculum) data for the new term. Unlike sections, courses, and relationships, however, you don't need to have "Allow empty datasets" toggled to "Yes".

How To Do It
PATH: Admin > Execute Merge

Step 1: Select "Courses" (Curriculum) from the "Select Type" dropdown menu.

Step 2:
- Scroll down to "Integration steps to execute".
- Ensure "Should Coursedog send updates to the SIS?" is toggled to "No" (this will allow you to pull data into Coursedog without posting anything back to your SIS).
- Setting "Should Coursedog send updates to the SIS?" to "No" should be a one-time occurrence for the term. Before you start making scheduling changes/updates in Coursedog, you will want to change this setting to "Yes". If you don't do that, you will lose any scheduling changes that you have made in Coursedog.

Step 3: Click "Execute".

Validate Your New Term Data in Coursedog

- After you've completed your manual merge, take some time to validate your data.
- You will want to review the new term data that came in from the integration to confirm sections, courses, and all other entities align with your SIS and merged properly.

Review and Update Term-Based Configurations

Set Your Current Scheduling Term

1. Navigate to Academic Scheduling > Settings > Terms.
2. Click into the term currently displayed under "Current Scheduling Term" to access a dropdown menu with options.
3. Select your new term from the dropdown menu.
4. Ensure the term under "Current Active Term" is the term for which classes are currently being held.

Terms		+ ADD TERM
Current Active Term(The term for which classes are currently being held)	**Current Scheduling Term**(The term for which class scheduling is currently taking place)	
Fall 2021	Spring 2022	
Semester Names		
Fall and Spring		

Managing Historical Terms

Marking Older Terms as "Historical"

Overview

- Coursedog recommends that you mark older terms as "Historical".
- Marking a term as "historical" will hide it in most sections of the User Interface (UI).

How To Do It

1. Navigate to Academic Scheduling > Settings > Terms.
2. Click into the term in question to open its profile.
3. Scroll down to the "Historical" option.
4. Set the toggle to "Yes".

Disabling Integrations for Historical Terms

You likely already did this when you followed the directions on page 7, but essentially:

1. Navigate to Admin > Merge Settings.
2. Scroll down to "Type-Specific Settings".
3. Under "Only run integrations for selected terms", remove any old terms that should no longer be running.

Removing Terms from Your Interface

To completely remove a term from your interface, contact your Coursedog support team for guidance.

Locking Schedules for Terms

- If your team would prefer to maintain visibility of older terms in your interface – but wishes to ensure that no edits are made or requests submitted for those terms – you can accomplish this by creating a phase that essentially "locks down" all permissions.
- Set most permissions, including add and edit sections and all request permissions, to "Deny" for the associated "locked" phase.
- You can learn more about setting up phases in the next section.

Review and/or Set Up Phases

Overview

- The primary use of phases is to modify the baseline field permissions and role permissions – and to allow rules to only apply to certain timeframes.
- Phases can either be manually changed by an admin during the scheduling cycle at Academic Scheduling > Settings > Terms, or admins can set up future actions

(Academic Scheduling > Settings > Roles > Future Actions) prior to the cycle to trigger the initiation of phases on certain dates.

- For example, an end user may have the permission to make a certain edit in one phase and that permission can be revoked in a later phase as the schedule is finalized.
- If "Schedule Phases" have been configured, you should be able to tell what phase your institution/team is currently in within the application (see screenshot below).
- Phases can be reused term after term.
- Best practice is to ensure phases are set up before creating a term-specific future action.
- Learn more about configuring and managing phases here.

Preparing for a New Term
When preparing for a new term, ensure:
1. The correct starting phase is aligned with the new term.
2. Dates have been configured and checked for the intended phase switch dates.

Set Up Future Actions
Overview
- When combined with phases, future actions allow you to override baseline permissions and change permissions on a date you select.
- Future actions cannot be reused term after term since key scheduling dates vary each term; you will need to create new future actions for every newly created/rolled term.
- You will need to create future actions, apply them to the new term, and determine dates as well as settings.
- This will auto trigger the associated phase on those dates.
- Most schools use future actions even if they don't use phases – you can use future actions to set the timeline at the top of the home screen to keep everyone on track.

How To Do It

Step 1: Navigate to Academic Scheduling > Settings > Roles > Future Actions.

Step 2: Click "+ Future Action".

Step 3: Input an action name.

Step 4: Input a date when you want the restriction to kick in.

Step 5:
- Set "Send email" to "Yes" if you wish to send an email notification to certain roles.
- If "Yes," write the email and select the relevant roles from the "Email Recipients" dropdown menu.

Step 6:
- Under "display terms," select the new term from the dropdown menu.
- This will impact which terms the timeline should display for.

Step 7 (Not Recommended):
- Although you can add "roles" and "permission to change" here, we don't recommend it.
- Instead, we suggest you create a phase and add that phase to your future action (see Step 8).
- Skipping to Step 8 will save you time down the road, since phases can be reused term after term whereas future actions are typically term-specific.

Step 8: Click "Add phase to change".

Step 9: Select the new term from the "Select term" dropdown.

Step 10: Select the phase from the "Select phase" dropdown.

Review & Configure Term-Based Field Permissions

Overview

Individual fields within the Section Editor may be designated as editable only for certain terms (and/or roles).

How To Do It

1. In order to review your configurations, navigate to Academic Scheduling > Settings > Field Options > Section Template.
2. Click on specific fields to learn more about their individual settings.
3. You should add/edit/remove terms as necessary to meet your needs for the current scheduling term. As you can see below, the "Part of Term" field in the Section Template is currently configured to be editable only for the Fall 2020 term.

Review Term-Based Meeting Patterns

Step 1: Navigate to Academic Scheduling > Settings > Meeting Patterns to view your existing Meeting Patterns.

Step 2: Ensure your standard meeting times displayed are correct for the current scheduling term.

Step 3:
- Edit/review your Meeting Pattern Group filters if any term- or date-specific filters are used.
- We recommend using broader term filters such as "term contains summer" or "term does not contain fall" to restrict meeting patterns, as this path requires no upkeep.

Update Term-Based Section Rules

Overview
- You should review your list of section rules and add the new term to applicable rules.
- We recommend you also review your section rule settings – including exempt departments and actions triggered on failure – to ensure they're still accurate.

How To Do It
1. Navigate to Academic Scheduling > Rules > Section Rules.
2. Click each section rule to open its settings.
3. Under "relevant term(s)", confirm that either "All terms" is checked OR, whenever applicable, that the new term is among the listed relevant term(s).
4. Review all rule settings to confirm they're still accurate and update as necessary.
5. You can learn more about setting up rules here.

Example
The below rule would only be routed to the listed workflow upon failure if the scheduling term is Fall 2020.

Instructor Preferences

PATH: Academic Scheduling > Preference Forms

- Preference forms are term-specific, but don't worry, you can easily copy a previous preference form into your new term following the instructions found here.
- This allows you to carry previously collected preferences to the new term by following the instructions found here.

Review & Update Workflows

Overview

You'll also want to review your existing workflows and confirm that the steps – and the participants listed within each step (and their associated permissions) – are both current and accurate.

How To Do It

1. Navigate to Academic Scheduling > Settings > Workflows.
2. Review all steps and participants for accuracy.
3. Make edits as necessary.
4. You can learn more about workflows here.

Perform Scheduling in Coursedog

- This is where your team or department schedulers will go into Coursedog and work to actually build the schedule for the term.
- During this time, you should have active integrations turned on (either nightly or real-time merges).
- At the end of your institution's implementation of the Academic Scheduling platform, the Coursedog team should have provided you with user guides for both your Admins and End Users/Department Schedulers to reference while they navigate this process (refreshers on the original training provided). You should be able to find these in your Coursedog Drive. If not, check out the Department Scheduler's Guide to Coursedog for more information, or ask your Coursedog Customer Success representative for your customized documentation.
- After the schedule has been validated and submitted via the platform, review the schedule, handle change requests, and review/resolve merge errors (details below).

Resolve Merge Errors

Best Practices

- View merge errors daily or weekly at Scheduling > Reports > Integration Errors.
- Resolve all merge errors as they come in (and prevent more by intervening with rules, section guidelines, and/or department scheduler training as needed).
- Ensure you have allowed at least one week between the end of the scheduling phase and the necessary/target date for final posting to the SIS to allow for resolution of any final merge errors.
- If your institution is operating with real-time or nightly merges, Admins should manage and resolve merge errors as regularly as possible during the scheduling phase.
- If your institution is operating with manual merges, you will need to merge the schedule, pull the merge error report, resolve all, and then merge again. Best practice is to regularly execute a manual merge and resolve errors throughout active scheduling and also allow ~2-3 weeks between final schedule submission and final posting to SIS for merge error resolution.

Managing Merge Errors

To rectify or review issues pertaining to sections in a given term, view the Scheduling > Reports > Integration Errors dashboard that gives you direct access to each section and the merge error in the context of the section. The integration includes other merges for the entities needed in the platform (including courses). You can view full merge reports from manual and nightly executions for any entity at Admin > Merge Reports and then follow the below steps.

Step 1: Locate the report that contains errors.

Step 2: Click "View Report Details".

Step 3: Expand the section containing the errors by clicking the toggle next to any steps that say "Unable to sync some changes".

Step 4: Review the errors section of the report to find a reason for the failure.

```
    }.
    "errors": [
      {
        "error": "unable to validate some updates",
        "errorDetails": {
          "BIOL15030481": {
            "errors": [
              "\"postBody[0].rowId\" failed custom validation because cannot delete a meeting time for a section
with professors assigned to it"
            ],
            "updates": [
              {
                "postBody": [
                  {
                    "endDate": "6/26/2020",
                    "startDate": "5/18/2020",
                    "start": "0000",
                    "end": "0000",
                    "termCode": "202006",
                    "scheduleCode": "9"
```

Step 5:
- Using the merge error as your guide, open the Section Editor to resolve.
- Access the Section Editor at Academic Scheduling > Section Editor > (Select Parent Course) > (Hover over the section number to access the "open section editor" option) > Open Section Editor.

Additional Notes
- You can learn more about managing merge errors here.
- For additional support, reach out to Coursedog Customer Support for help as needed; you can also refer to our SIS-specific guides that speak to common merge errors and resolution steps.

Post/Publish Term to SIS & View Integration Status

Overview
- If sections are not part of your nightly integration and Coursedog is not set to be sending updates to the SIS (as you prefer manual, more controlled merges), follow the process below once the schedule has matured and you are ready to post/publish it back into the SIS.
- If section data is enabled (i.e. Set to "Yes") and set to send updates to the SIS, you can skip this section – you are posting to the SIS regularly by default.

Recommendations around Posting to Your SIS
- If your institution is not utilizing real-time or nightly sync, Coursedog recommends that you begin posting the schedule back to your SIS near the Schedule Submission due date, when all schedules should have been submitted.
- This timing should align with late-stage notification events in your timeline/process.
- Posting too early may lead to unnecessary errors and rejections of data by your SIS. These errors will consume valuable time while you evaluate issues which may not have appeared had the schedule been more mature before syncing, or could be safely ignored until later in the scheduling cycle.
- If you post too late, you risk needing to review many warnings all at once and missing the opportunity to educate your schedulers on how to correct any mistakes they're making.
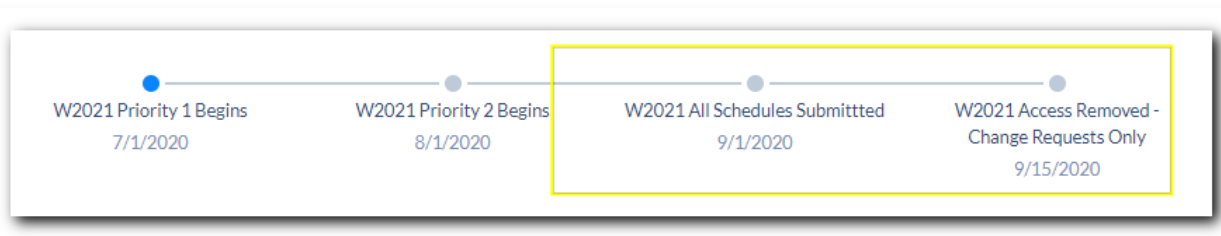
Post / Execute Manual Merge of Schedule to SIS

Overview

You may execute a manual merge as frequently as you like, including daily. This is recommended if sections are outside of the scope of your nightly or real-time integration or you're excluding a specific term from the scope of the integration. Alternatively, at this point you may consider enabling the bi-directional sync integration for the duration of the scheduling cycle (until the schedule is formally published) for the SIS posting.

How To Execute a Manual Merge

Follow the below steps to post your schedule to your SIS.

1. Navigate to Admin > Execute Merge.
2. Set "Select Type" to "Sections".
3. Select the new term from the "Select Term" dropdown.
4. Set "Should Coursedog send updates to the SIS" to "Yes".
5. Click "Execute".

Additional Notes

- Executing a manual merge of your schedule to the SIS may take more than 10 minutes to complete, but you don't need to stay on the screen. Simply check the Merge Reports after 20 minutes, by which point you should be able to see the most recent report.
- If you see warnings in the merge reports and are confused about what your SIS has accepted and what it has issued warnings for, we recommend that you reach out to [Coursedog Customer Support](#) for guidance.
- You can execute a "dry run" that will generate a report highlighting all the transactions to be executed without actually sending any information to your SIS. Learn more about integration dry runs [here](#).
- There is a default protection enabled for nightly merges that prevents changes to more than 100 entities. If you need to merge changes to more than 100 entities, you can bypass this protection with a manual merge at Admin > Execute Merge. [Learn more here](#).

View Integration Status in the Section Editor

Overview

- If your school is an integrated environment, you will benefit from integration sync status updates in the section editor.
- How often those statuses are updated depends on whether you use real-time, nightly, or manual merges.
- The status will only be visible to users if the "View Section Integration Status" permission/setting under Academic Scheduling > Settings > Roles > Course Editor has been set to "Allow" for their role.

Potential Merge Statuses

Section Not Synced

The following status will appear for sections that have not yet synced, including all new sections.

Synced Successfully

If a section has been synced successfully, it will show the following status:

Editing LAW734 - 001 ⚠️   ✕   Activity

✅ This section was **succesfully** synced with the SIS on 9/21/2020 at 1:41 PM.   No Recent Activity

⚠️ There are **no times** associated with this section.

📄 **General Information**

Class Section
001

Component *
Lecture ▼

Event Id ❓
—

Class Number ❓
1002

Class Type
Enrollment Section ▼

Grading Basis
GRD - Graduate Letter Grades

Class Status
Active ▼

Instruction Mode *
In Person ▼

Campus *
MAIN ▼

Location
MAIN ▼

DELETE SECTION   CANCEL   **SAVE SECTION**   Click Enter to comment

Synced with Errors
If a section synced with errors, the following status will be shown:

Editing LAW733 - 001 ⚠️   ✕   Activity

⚠️ This section encountered an error while syncing with the SIS on 9/21/2020 at   No Recent
12:55 PM. Click here to view details.

⚠️ There are **no times** associated with this section.

📄 **General Information**

Class Section
001

Component *
Lecture ▼

Event Id ❓
—

Class Number ❓
5231

Class Type
Enrollment Section ▼

Grading Basis
CNS - Pass/Fail Grade

Class Status
Active ▼
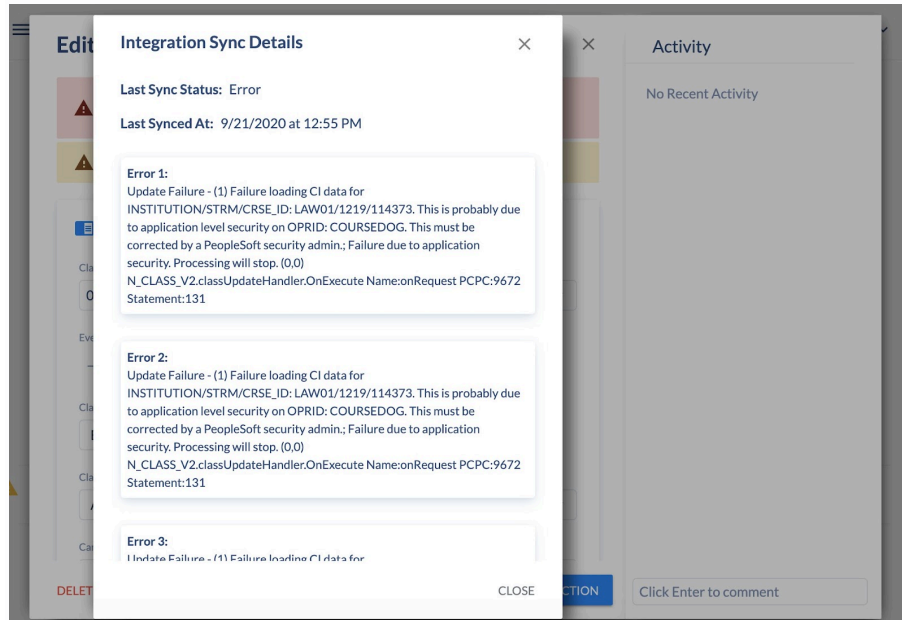
Instruction Mode *
In Person ▼

Viewing Sync Details

- The user can click on the status to open a modal with more details.
- The status only shows errors when syncing Coursedog data with the SIS.

<Institution Name> Integration Strategy Overview