# BLOCK SCHEDULING: STUDENT SELF-SERVICE

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# **REVISION HISTORY**

Version	Date	Name	Description
1	02.11.16	Bracken	Final
		:	

## INTRODUCTION AND PURPOSE

Management of block scheduling can be done in several ways depending on the extent of the student's involvement in the registration process for the block of courses. The purpose of this procedure is to demonstrate how to create blocks when the College/Department/Program intend to allow the student to register for the block through self-service. UCR's primary use of block registration is for Learning Communities and therefore, the procedures will focus examples on Learning Communities.

## RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

- 1. College/Department/Programs who would like to utilize block registration for a student population will need to first provide the Registrar's Office with details of the student population and program requesting block registration.
- 2. Once a College/Department/Program is approved for block registration, they are responsible for creating their own course blocks.
- 3. If Cohorts will be used to identify student populations for block registration, use *Cohort Assignment* procedures to assign the necessary cohorts.
- 4. If reserved seating will be used to assist with enrollment management of course sections assigned to Blocks, use *Academic Scheduling: Banner* procedures to set these up.
- 5. Due to the fact that this process requires students to be able to select a block through self-service during registration, all set up MUST be completed prior to the Schedule of Classes going live for the quarter.
- 6. It is the responsibility of the College/Department/Program to manage their enrollment, block registration, and drop students from courses if they no longer meet the criteria to enroll in the block.
  - a. For example, students who are not active learning community cohort participants, after enrolled in a learning community block, must be dropped from all those courses and should have their cohort inactivated.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

- 1. Registrar's Office
- 2. Academic Departments

## **BEFORE YOU BEGIN**

If this is the first time you are reviewing this procedure, open Banner Training (bannersbxe.ucr.edu [Banner 8] and <u>https://studentoverallsb.ucr.edu/StudentOverall</u> [Banner 9]) to follow along.

## FORMS

The forms listed below are covered in this training. This process uses Block Scheduling forms in Banner 8 and Banner 9.

Form	Form Name	Description
STVBLCK (Banner 8)	Block Code Validation Form	Use the Block Code Validation Form (STVBLCK) to create, update, insert, and delete block codes which are used in Block Scheduling processing.
SFABLCK (Banner 9)	Block Registration Control Form	
SFABRDF (Banner 9)	Block Rule Definition Form	

## PROCEDURES

## DEFINE A BLOCK

#### STEPS

- 1. In Banner 8, Go To STVBLCK
- 2. Enter the **Block Code** 
  - a. Block Codes should follow a naming convention to allow for ease in searching and reporting. The field has a 10 character limit.
  - b. For example, when creating block codes for Learning Communities the following naming convention should be used:

L	L	L INDICATES THIS IS A LEARNING COMMUNITY BLOCK
Е	Н	INDICATES COLLEGE (N-CNAS; H-CHASS; E-BCOE)
В	С	
С	Н	6 CHARACTERS TO NOTATE DEFINING INFORMATION SUCH AS:
E	S	MATH PLACEMENT
G	С	MAJOR
E	Ν	ETC.
Ν	Т	NOTE: the first 8 digits match the cohort code
0	0	Indicates the
1	2	Block number NOTE: the last 2 digits indicate the block

#### 3. Enter the **Description**

- a. The description of the block will be visible to the student in self-service, so be mindful when selecting the description.
- b. The field has a 30 character limit.
- c. It should follow a similar structure to the code as a way to differentiate the blocks from others.
- d. Save.
  - 1. Block codes and descriptions cannot be changed once they have courses assigned to them so you MUST ensure that the block set up is final and accurate before assigning any courses to the block.
- e. Double check your set up before adding courses to your block.

Block Code Validation Form	STVBLCK 8.0 (PPRDX	Е) 100000000000000000000000000000000	
	Block Code	Description	Activity Date
	HPRBSB01	CHASS PRBS Blue Block 1	27-AUG-2015
	HPRBSB02	CHASS PRBS Blue Block 2	27-AUG-2015
	HPRBSB03	CHASS PRBS Blue Block 3	27-AUG-2015
	HPRBSG01	CHASS PRES GOR BIOCK 1	27-AUG-2015
	HPRBSG02	CHASS PRBS Gold Block 2	27-AUG-2015
	HPRBSG03	CHASS PRBS Gold Block 3	27-AUG-2015
	HPRBSG08	CHASS PRBS Gold Block 8	27-AUG-2015

### DEFINE COURSE SECTIONS FOR A BLOCK

#### STEPS

- 1. In Banner 9, Go to SFABLCK
- 2. Enter the term in the Term Field
- 3. Enter the appropriate block code in the **Block Field** 
  - a. If you do not recall the name of the block, you can look it up by clicking on the button with the three dots. This will invoke a lookup of the validation table.

#### 4. Click Go

ellucian. UNIVERSITY Heather (HER) Edberg   🖴 Sig	in Out   🌞 Preferences   🕑 Help
Banner *STUDENT *REGISTRATION *BLOCKREG Block Registration Control (SFABLCK)	Go To 👻 Tools 👻
NOTIFICATION CENTER: 0	C 8 6 % X
Term * Block *	Go
Get Started: Fill out the fields above and press Go.	

- 1. This will open 2 blocks on the form
- 2. In the **Capacity Definition block** enter the maximum number of students who can enroll in the block in the field labeled **Block Pre-Assignment Limit**
- 3. Save

🐔 🔻 Banner	*STUDENT *RI	EGISTRATION *BLO	CKREG Block Regi	stration Control (SFABLCK			G	o To	Tools
NOTIFICATION CENTER	: 0						C	e	🖻 🦘 🗙
Term: 201620 Spring 2	016 Block: HPRBSB0	1 CHASS PRBS Blue Block	k 1						Start Over
* CAPACITY DEFINIT	ION *					🕂 İnse	rt 🗖 Delete 🖣	Сору	<b>Y</b> Filter
Block Pre- * Assignment Limit	100								
* BLOCK REGISTRA	TION CONTROL*					🕂 Inse	rt 🖪 Delete 📲	Сору	🗨 Filter
	Course	and Section			Enroll	ment			CR
CRN *	Subject	Course Number	Section	Maximum	Actual		Remaining		CRN Enrollm
12273	CHFY	002E	001		75	1		74	Lesser than
12274	CHFY	002E	021		25	1		24	Lesser than
12281	CHFY	007	001		25	4		21	Lesser than
Insert									+
Total Credit: Hours	5.000			Total Billing: Hours	5.000				
🗵 🛣 Last up	dated by: KIMBERW on 0	1/21/2016							Save

- 4. In the Block Registration Control block click the Insert button
- 5. A new line will then be added to the Course and Section area
- 6. Enter the **CRN** of a course to be added in the **CRN field** of the new line the course section information will then populate in the other fields on the line.
  - a. If you do not recall the CRN, you can look it up by clicking on the button with the three dots. This will invoke a lookup of existing sections.
- 7. Repeat steps 7 through 9 for each course to be included in the block
  - a. Make sure you add each section, including linked discussions or labs,
- 8. Click Save
- 9. Adding and dropping of courses in a block can impact enrollment and ultimately enrollment management of course sections. Make sure to double check your work to ensure everything is accurate prior to registration beginning.

BLOCK REGISTRATIO	ON CONTROL*				🚹 Inse	ert 🖪 Delete 📲 Cop	y 🌪 Filter
	Course a	nd Section		CR			
CRN *	Subject	Course Number	Section	Maximum	Actual	Remaining	CRN Enrollm
12281	CHFY	007	001	25	4	21	Lesser than
1							
12274	CHFY	002E	021	25	1	24	Lesser than
12273	CHFY	002E	001	75	1	74	Lesser than
•			,				×
Insert							

## DEFINE STUDENT CHARACTERISTICS FOR THE BLOCKS

The following set-up allows you to define the students who can view the block or blocks during registration. If you select to use cohort as a means to identify the student population please use *Cohort Assignment* procedures to ensure the students are assigned appropriately.

#### STEPS

6.

- 1. In Banner 9, go to SFABRDF
- 2. Enter the term in the **Term field**
- 3. Click Go

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Banner *STUDENT *REGISTRATION *BLOCKREG Block Rule Definition (SFABRDF)	Go To 👻 🛛 Tools 👻
NOTIFICATION CENTER: 0	C 🔒 🛱 🛩 🗙
Term * 201620 Spring 2016 Copy Term	Go
Get Started: Fill out the fields above and press Go.	

- 4. This will open the Block Rules Definition block and Block Settings tab on the form
- 5. Add a line to the Block Rules Definition block by clicking Insert
  - With the new line highlighted, add information about the characteristics of the student population.
    - a. For example, for Learning Communities students will be identified by Cohorts. Therefore, scroll to the right until you reach the cohort column.
    - b. Enter the cohort associated with this block in the column labeled cohort.
    - c. This creates a "rule" that students enrolling in this block must be part of the indicated cohort.

*		Banner	*STUDENT	*REGI	ISTRATION	*BLOCI	REG	Block Rule D	efinition (SFABRDF)	$\geq$			Go To 🔻	
NOTI	FICAT	ION CENTER	8:0										C 🗎 🖥	🦈 🗙
Ter	<b>m:</b> 20	1620 Spring 2	2016										s	tart Over
•	BLOC	K RULES DE	FINITION								🛨 Insert	🗖 Dele	te 📲 Copy	🗨 Filter
ield	Of St	udy Type	Field Of Study C	Code	Department		Curric	ula	Student Attribut	es	Cohort		Class	
											LHCHCNM:	BRN		
											LNTRKAM	RN		

- 7. In the three columns to the very far right (you may need to scroll to the right) check the boxes as appropriate:
  - a. The **Block Selection Required** checkbox when checked, presents the blocks to students when they log into Registration.
  - b. If the student has more than one block for which they qualify for per the rules set up here, the **Allow Change Block** checkbox will allow students to switch blocks if it is checked or prevent block changes if it is unchecked.
  - c. The Active checkbox triggers the block to display to students for enrollment if it is checked.

	Banner *STUDENT	*REGISTRATION	*BLOCKREG	Block Rule Definition (SFABRDF)		Go To 🔻 🛛 Tools 👻
NOTIFICATION	CENTER: 0					C 🗎 🖥 👟 🗙
Term: 20162	0 Spring 2016					Start Over
* BLOCK R	RULES DEFINITION				🕂 Insert 🗖 Delete	Copy 🌪 Filter
	Student Attributes	Cohort	Class	Block Selection Required	Allow Change Block	Active
		LHCHSCNTRN				
		LHSOPHMRRN				
		LNCHM9AHRN				V

- 8. Navigate to the **Block Settings block**
- 9. Click Insert
- 10. In the **Block field** enter the block code associated with the rule defined.
- 11. In the **Add and Drop Courses field** use the buttons to indicate if adding or dropping courses that are part of the block is not allowed, allowed only for courses which are not part of the block, or if students may add and drop any course without restriction.
- 12. If you will be offering more than one block to the **same student population** keep the block rule highlighted and repeat steps 8 through 11. This allows the students in that population you defined in the top block (Block Rules Definition) to see more than one block selection at the time of registration.

	0 Spring 2016						Start Over		
BLOCK R	ULES DEFINITION					🛨 Insert 🛛 🗖 Delet	te 🍯 Copy 🤶 Filter		
	Student Attributes	Cohort	Class	Block Select	tion Required	Allow Change Block	Active		
		LEBCEGENRN							
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<b>«                                    </b>	/4 > >>						[11 - 15 / 17		
В	lock Settings					🕂 Insert 📄 Delet	te 🍯 Copy 🌪 Filte		
Block *			Assign Block to Stu	Assign Block to Student * Add and Drop			Courses *		
		ma Diasis 4	☑ Ø Not Allowed €			Non-Block Only Without Restriction			

#### 13. Click Save

- 14. Students may now enroll via the self-service website.
  - a. A staff member can manually enroll the student following the procedures Block Scheduling Manual.
- 15. Repeat steps 5 through 13 for additional populations and blocks.

## FINAL QUIZ

1. To complete this process you need to work in Banner 8 to set up the code and description for the blocks, but then move to Banner 9 to complete the set-up of the blocks and the rules for displaying to the students in self-service.

#### a. TRUE

- 2. The maximum number of students who can enroll in the block should be placed in the field labeled **Block Pre-Assignment** Limit?
  - a. TRUE
- 3. In Banner 9 navigation, you will use the "Go" button instead of "Next Block".
  - a. TRUE
- 4. Adding and dropping of courses in a block can impact enrollment and ultimately enrollment management of course sections. Make sure to double check your work to ensure everything is accurate prior to registration beginning.
  - a. TRUE
- 5. When entering the **CRN** for the courses in the block you only have to add the primary activity.
  - a. FALSE, you need to add <u>each section</u>, including linked discussions or labs, to be included in the block in the **CRN** field
- 6. Due to the fact that this process requires students to be able to select a block through self-service during registration, all set up MUST be completed prior to the Schedule of Classes going live for the quarter.
  - a. TRUE