

IMPORTANT NOTE: This knowledge base and our support ticketing system have moved to [Salesforce Service Cloud](https://coursedog.my.site.com/support/s/) (<https://coursedog.my.site.com/support/s/>).

If you need to submit a support ticket, please do so [there](https://coursedog.my.site.com/support/s/) (<https://coursedog.my.site.com/support/s/>) (and bookmark the new Knowledge Base for future reference).

See [FAQs](https://coursedog.freshdesk.com/support/discussions/topics/48000566821) (<https://coursedog.freshdesk.com/support/discussions/topics/48000566821>) to learn more.

>

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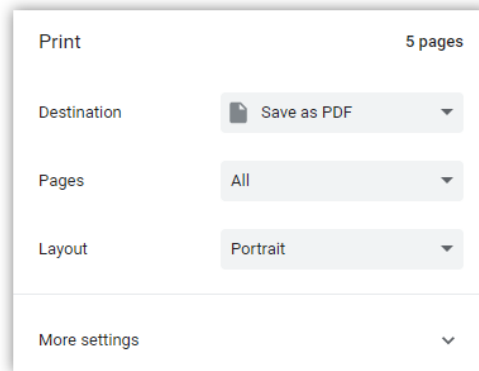
Overview

- This guide is intended to help Department Schedulers get the most out of Academic Scheduling.
- Every section of this guide includes a high-level “Overview” for the listed feature.
- The “Learn More” section includes links to more detailed articles, videos, and walkthroughs.
- Some sections include additional sub-sections, broken down by topic.

Saving this Page as a PDF

If you wish to save this or any linked article(s) as a printable PDF, simply:

1. Right click anywhere on the page (or control+click on a Mac).
2. Select “print” from the list of options.
3. Under “Destination”, select “Save as PDF”.
4. Click “Save”.
5. Select the folder on your desktop where you’d like to save the file.
6. Click “Save”.



Academic Scheduling Overview

Overview

- Coursedog's Academic Scheduling platform helps your institution create optimized schedules without spreadsheets or back and forth emails.
- Academic Scheduling helps you offer the right courses, seats, and sections; enforce scheduling policies at the department level; gather faculty preferences; eliminate scheduling conflicts; and automatically make the perfect room assignments.

Learn More

- [Introduction to Academic Scheduling for New Users](https://coursedog.freshdesk.com/support/solutions/articles/48001255025-introduction-to-academic-scheduling-for-new-users) (<https://coursedog.freshdesk.com/support/solutions/articles/48001255025-introduction-to-academic-scheduling-for-new-users>).
- [Academic & Event Scheduling Demo Video](https://youtu.be/YG76nU17X3U) (<https://youtu.be/YG76nU17X3U>).
- [Scheduling Process Overview](https://capture.navattic.com/ckzn2uurz9166209lbq9b40ff0?g=ckzh5517p059609mgnodb4xwl&s=0) (<https://capture.navattic.com/ckzn2uurz9166209lbq9b40ff0?g=ckzh5517p059609mgnodb4xwl&s=0>). (High-Level)
- [Academic Scheduling Overview Video](https://www.youtube.com/watch?v=C7fJfxv6Jic) (<https://www.youtube.com/watch?v=C7fJfxv6Jic>). (Detailed) (<https://youtu.be/YG76nU17X3U>).
- [Academic & Event Scheduling Interactive Product Walk-Through](https://capture.navattic.com/ckznx7hzhv117309l3uy4ga6is) (<https://capture.navattic.com/ckznx7hzhv117309l3uy4ga6is>).
- [How Academic Scheduling Works for Department Schedulers](https://coursedog.freshdesk.com/support/solutions/articles/48001076130-1-introduction) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076130-1-introduction>).

Logging In

Overview

- Log into Coursedog at app.coursedog.com (<http://app.coursedog.com>) with your institutional email address and password.
- If your institution is using single-sign-on (SSO), you will be redirected to your institution's login page.
- Coursedog works with most browsers, but Google Chrome is recommended.

Learn More

Visit [Logging Into Coursedog](https://coursedog.freshdesk.com/support/solutions/articles/48000969177-logging-into-coursedog) (<https://coursedog.freshdesk.com/support/solutions/articles/48000969177-logging-into-coursedog>) to learn more about supported browsers, ways to log in, and logging out.

Homepage

Overview

After logging into Coursedog, you will be directed to either a product menu (if you have multiple Coursedog products and haven't defined a default product) – where you can click “Scheduling” – or you will be taken directly to the Academic Scheduling Homepage.

Homepage Anatomy

1. *Three Lines* – Regardless of your location in the platform, you can select the three parallel lines in the upper-left corner to view the main menu.
2. *Name/Logo* – Regardless of your location in the platform, you can select the logo/Your Institution's Name to return to the home page.
3. *Left-Hand Nav* – Use the main menu on the left to navigate between the different modules.
4. *Resources Widget* – Click this to search our help center for articles or to submit a support ticket without leaving our platform.
5. *Help Center* – This will open our help center in a new tab.
6. *Notification Center* – Click here to view any requests where you're a participant.
7. *Grid/Coursedog Product Navigation* – If your institution has purchased additional Coursedog products, and any of them are assigned to you, you can navigate to them here.
8. *User Profile* – Navigate here to view your Account Settings (this is helpful if you want to change your name, password, default term, default views, and notification preferences) or Log Out.
9. *Timeline* – This timeline contains key dates for the current scheduling term and its associated phases.
10. *Departmental Status* – This section of the home page provides a high-level overview of departments you are associated with.

The screenshot shows the Coursedog Academic Scheduling Homepage. The interface includes a top navigation bar with a logo and name, a timeline of key dates, a left-hand navigation menu, and a main content area with a search bar and a table of departmental status.

Timeline:

- Blank Email Subject: 3/31/2022
- Event Name: 4/1/2022
- Send Email Test: 6/5/2022
- Restrict Ability to Edit Sections: 6/6/2022
- Future Action Test: 2/24/2023
- Planning Phase Test: 3/9/2023

Departmental Status (Fall 2023-24)

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	VALIDATION	SUBMISSION
English	W. Wordsworth and H.D. Thoreau	36	75	28		In Progress

Learn More

- See how the [timeline works here](https://coursedog.freshdesk.com/support/solutions/articles/48001161270-phases-configuring-and-managing-scheduling-phases#Build-Your-Timeline) (<https://coursedog.freshdesk.com/support/solutions/articles/48001161270-phases-configuring-and-managing-scheduling-phases#Build-Your-Timeline>).
- Read about our [notification center](https://coursedog.freshdesk.com/support/solutions/articles/48001211424-workflows-workflow-notifications#Viewing-Notifications) (<https://coursedog.freshdesk.com/support/solutions/articles/48001211424-workflows-workflow-notifications#Viewing-Notifications>).
- Learn how to use our [help center](https://coursedog.freshdesk.com/support/solutions/articles/48000969172-using-our-help-center) (<https://coursedog.freshdesk.com/support/solutions/articles/48000969172-using-our-help-center>).
- See our [In-App Help article](https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help) (<https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help>) for a breakdown of all available help options.
- Learn more about [monitoring departmental status](https://coursedog.freshdesk.com/support/solutions/articles/48000969716-departments-adding-editing-departments#Monitoring-Departmental-Status) (<https://coursedog.freshdesk.com/support/solutions/articles/48000969716-departments-adding-editing-departments#Monitoring-Departmental-Status>).

Account Settings

Overview

- If your institution schedules multiple terms at once and you'd like to define a default term to appear when you log in, you can do that in Account Settings (accessible via the User Profile – #8 in the above screenshot).
- If you don't specify a default term, the current scheduling term will be used as the fallback.
- You can also set notification preferences and reset your password under Account Settings.

Account Settings

 Profile

Profile Settings

General

First Name

H.D.

Last Name

Thoreau

Password

Reset Password

.....

CONTINUE

Terms

Default term

App default term

Default Views

Events View

App default view

Courses View

App default view

Programs View

App default view

Learn More

- [Setting Your Default Term](https://coursedog.freshdesk.com/support/solutions/articles/48001190731-setting-your-default-term) (<https://coursedog.freshdesk.com/support/solutions/articles/48001190731-setting-your-default-term>)
- [Changing Email Notification Frequency](https://coursedog.freshdesk.com/support/solutions/articles/48001164718-changing-email-notification-frequency) (<https://coursedog.freshdesk.com/support/solutions/articles/48001164718-changing-email-notification-frequency>).

Instructors

Overview

If permissions allow, you can view and/or edit an instructor's information and status, assigned courses, teaching load and more in their profile.

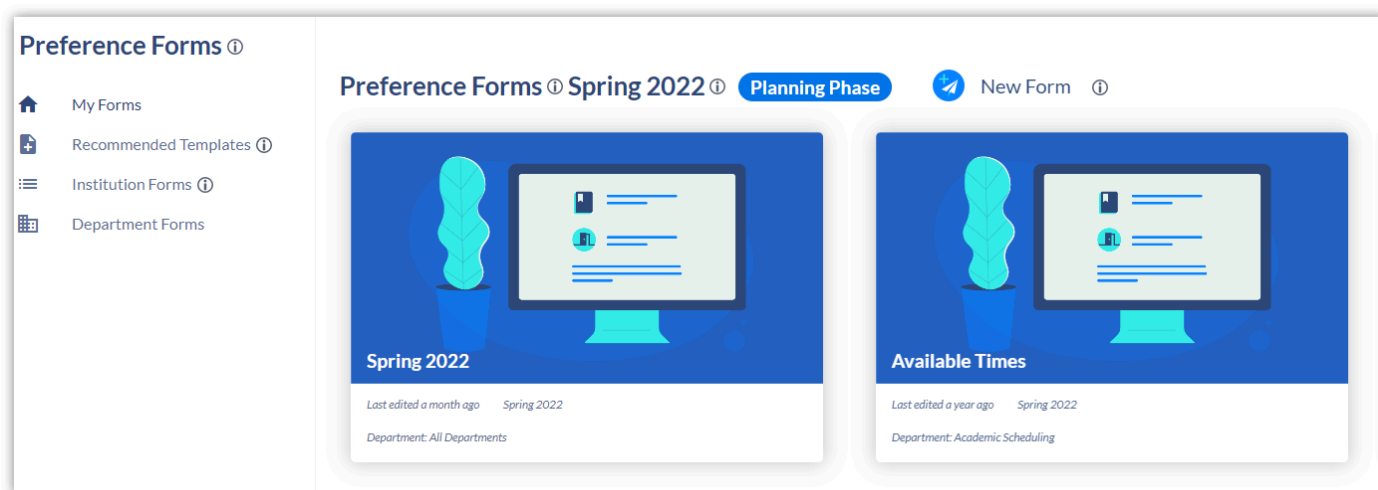
Learn More

[Viewing & Editing Instructor Profiles](https://coursedog.freshdesk.com/en/support/solutions/articles/48001246810-instructors-viewing-editing-instructor-profiles) (<https://coursedog.freshdesk.com/en/support/solutions/articles/48001246810-instructors-viewing-editing-instructor-profiles>), breaks down the Instructors tab.

Faculty Preference Forms

Overview

- You no longer need to sort through emails from faculty requesting times and rooms for their sections because Coursedog automates this process.
- Preferences can be collected through an online form (and delivered to instructors via a shared link).
- Faculty preferences are surfaced when making manual scheduling assignments but also impact room assignments in the Section Optimizer.



Learn More

- [Gathering Faculty Preferences](https://coursedog.freshdesk.com/support/solutions/articles/48001076132-instructors-gathering-faculty-preferences) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076132-instructors-gathering-faculty-preferences>) explains how preference forms work and includes step-by-step instructions.
- Our [FAQs article](https://coursedog.freshdesk.com/support/solutions/articles/48001238015-preference-forms-faq) (<https://coursedog.freshdesk.com/support/solutions/articles/48001238015-preference-forms-faq>) answers common questions.
- See how it works with our [Preference Forms walkthrough](https://capture.navattic.com/MqfloSdYcQUqPhciChCV?g=Tct3AixvOxwakEW1gU4i&s=0) (<https://capture.navattic.com/MqfloSdYcQUqPhciChCV?g=Tct3AixvOxwakEW1gU4i&s=0>).

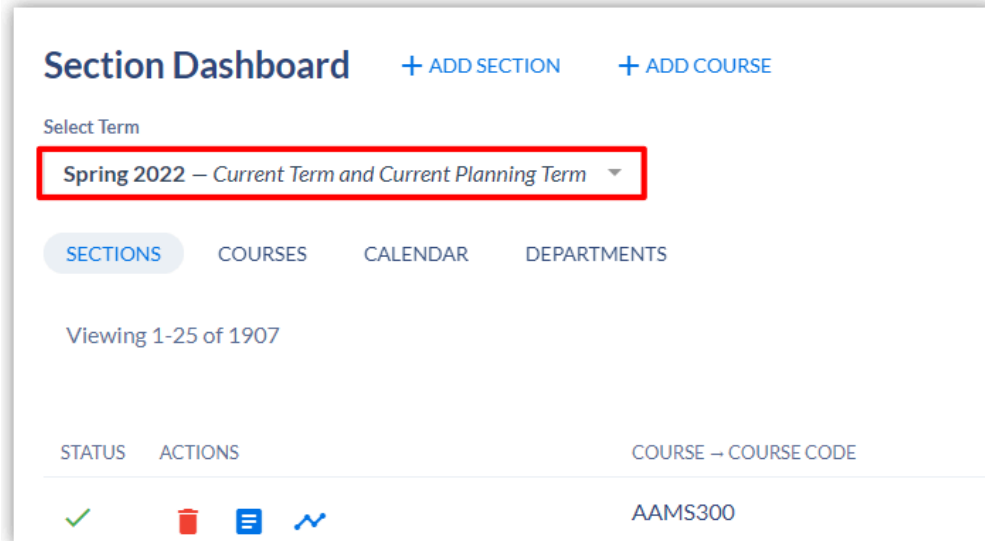
Section Dashboard Overview

[Overview](#) | [Sections](#) | [Courses](#) | [Calendar](#) | [Departments](#) | [Learn More](#)

Overview

- Your institution's schedule is built in the Section Dashboard.
- You will want to ensure courses are properly configured before you make section configurations and/or assignments.
- When you navigate to the Section Dashboard, you can choose from four potential tabs/views: Sections, Courses, Calendar, and Departments.

- Anytime you are editing your schedule, make sure you are viewing the intended term. You can change the displayed term by clicking into the listed term in the top left of the screen (highlighted in red in the below screenshot).



Sections

- The “Sections” tab will list all available sections for the displayed term.
 - If you are a department scheduler, it may be filtered down to just your department’s sections.
 - Additionally, it is possible that your institution has set a default view that will impact the filters and columns displayed.
- From this page view you can also view course and section information; view conflicts; add, edit, or cancel sections; add courses from your Course Inventory; view rule violations; and create, save, and export views.
- For integrated schools, best practice is to not edit, delete, or add courses (other than via Course Inventory) in Coursedog.

Courses

- Within the “Courses” tab you can view all courses that exist within the given scheduling term.
- The display columns (Actions, Course Code, Course Name, Section Count, and Departments) are fixed.
- Within this view you can add course filters and search (similar to the Sections page) in order to return the desired course results.
- All available actions you can take will be surfaced under “Actions”.

Calendar

View the schedule in either a traditional calendar view, list view (organized by day and time), or room view (see each room’s assignments broken down by day and time).

Departments

- You can view all Departments you have access to here.

- This view provides an overview of Department status, which indicates where each department is within their scheduling process (“Status” column), department name, associated schedulers, course count, section count, conflicts, and available actions (e.g. “Validate Schedule” and “Show Sections”).

Learn More

- Learn about [navigating the Section Dashboard](https://coursedog.freshdesk.com/support/solutions/articles/48001243410-sections-navigating-the-section-dashboard) (<https://coursedog.freshdesk.com/support/solutions/articles/48001243410-sections-navigating-the-section-dashboard>).
- [Course Configuration](https://coursedog.freshdesk.com/support/solutions/articles/48001076131-courses-course-configuration) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076131-courses-course-configuration>) and [Section Configuration](https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration) (<https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration>).
- See common [questions](https://coursedog.freshdesk.com/support/solutions/articles/48001202002-section-editor-troubleshooting) (<https://coursedog.freshdesk.com/support/solutions/articles/48001202002-section-editor-troubleshooting>) and solutions.
- Check out [this article](https://coursedog.freshdesk.com/support/solutions/articles/48000982230-section-editor-how-can-i-view-a-section-s-version-history-) (<https://coursedog.freshdesk.com/support/solutions/articles/48000982230-section-editor-how-can-i-view-a-section-s-version-history->) if you want to view a section’s version history.
- [Go here](https://coursedog.freshdesk.com/support/solutions/articles/48001216217-section-editor-how-can-i-find-sections-by-crn-callnumber-) (<https://coursedog.freshdesk.com/support/solutions/articles/48001216217-section-editor-how-can-i-find-sections-by-crn-callnumber->) if you’re a Banner school using CRN/callNumber.
- Learn more about the [calendar’s Room View](https://coursedog.freshdesk.com/support/solutions/articles/48001183859-filters-room-view-of-calendar) (<https://coursedog.freshdesk.com/support/solutions/articles/48001183859-filters-room-view-of-calendar>).

Additional Section Editing Features

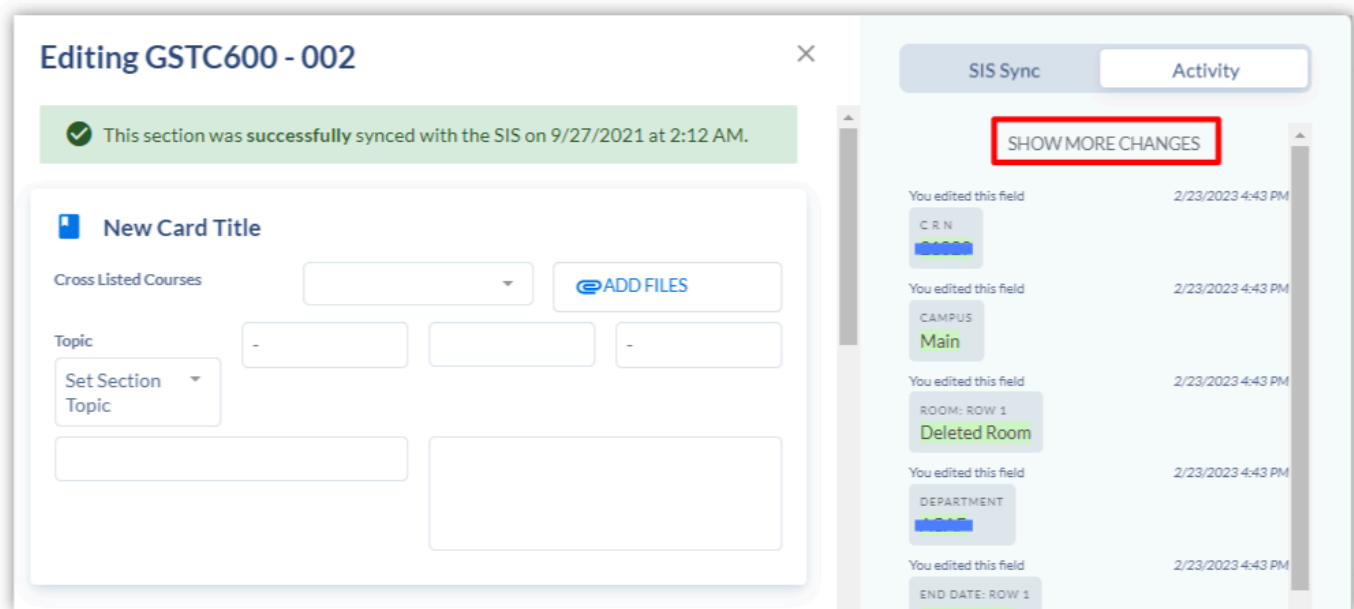
[Overview](#) | [Activity Tracker](#) | [Section Demand Analytics](#) | [Learn More](#)

Overview

When viewing a section, you will also have the ability to view its change history (via an activity tracker) as well as Section Demand Analytics.

Activity Tracker

- When you open a section to view/edit it, the modal will include an “Activity Log” tab.
- This records editing activity for a section by capturing all changes made to the section within Coursedog or as a result of a merge. Some users might also see an SIS Sync tab to the right.



Section Demand Analytics

This feature is a powerful reporting tool that uses historical enrollment data to offer insights on the number of seats and sections an institution should offer for future terms.

Learn More

- Learn more about the activity log [here](https://coursedog.freshdesk.com/support/solutions/articles/48000982230-section-editor-how-can-i-view-a-section-s-version-history-) (<https://coursedog.freshdesk.com/support/solutions/articles/48000982230-section-editor-how-can-i-view-a-section-s-version-history->).
- If you see the SIS Sync tab in your UI, you can learn more about it [here](https://coursedog.freshdesk.com/support/solutions/articles/48001231960-integration-section-sis-sync-tool-) (<https://coursedog.freshdesk.com/support/solutions/articles/48001231960-integration-section-sis-sync-tool->).
- [This article](https://coursedog.freshdesk.com/support/solutions/articles/48000980293-forecasting-how-can-i-forecast-demand-with-section-demand-analytics-) (<https://coursedog.freshdesk.com/support/solutions/articles/48000980293-forecasting-how-can-i-forecast-demand-with-section-demand-analytics->) walks through forecasting demand.

Adding Courses

Overview

- Depending on your institution's process, some of this may be taken care of within your SIS.
- We don't support workflow processes for adding courses in Scheduling, so Coursedog will not capture approvals on new courses.
- In an integrated environment, it is a best practice to NOT edit or delete courses in Coursedog.

Learn More

Check out our [Course Configuration article](https://coursedog.freshdesk.com/support/solutions/articles/48001076131-courses-course-configuration) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076131-courses-course-configuration>) to see how to view, add, and edit courses.

Adding, Editing & Deleting Sections

PATH: Academic Scheduling > Section Dashboard > Sections

Overview

- To add a section, click “+ SECTION”.
- To edit a section, click the section to open it.
- Deleting sections in Coursedog is NOT supported for all schools, and the option is generally turned off for most Department Schedulers.
- If you see a yellow alert triangle next to a section, that means it is in violation of a rule; you can see what the violation is by hovering over the triangle.

STATUS	ACTIONS	COURSE → COURSE CODE
✓	  	AAMS300
✓	  	AAMS314
✓	  	AAMS390
 Room OWEN-207 (Classroom) is double booked with HIST355C Section 600. Otha Dixon-McKnight is teaching HIST355C Section 600 at the same time.		

Learn More

Our [Section Configuration article](https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration) (<https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration>) includes instructions for adding, editing, and deleting sections.

Core Section Details

[Overview](#) | [Relationships](#) | [Credits](#) | [Enrollment Capacity](#) | [Room Preferences](#) | [Learn More](#)

Overview

The order in which you configure sections and make assignments will vary based on your institution's processes and the fields your admin added to the Section Template, but many institutions prefer to configure all core section details (e.g. relationships, credits, enrollment settings, room preferences, etc.) before assigning instructors, meeting patterns, and rooms.

Relationships

- Relationships are used for defining time and/or room connections between sections.
- It's important to set up section relationships prior to assigning meeting patterns and rooms, as relationships can impact those assignments.

- Whether relationships are created by Department Schedulers or Admins varies from institution to institution.
- You can view/add/edit/delete relationships in two different places: the Relationships Dashboard (Academic Scheduling > Relationships) and directly in the Section Dashboard (Academic Scheduling > Section Dashboard). However, what you can see and do – and where – will depend on your institutional practices as well as permission settings configured by an Admin.

NAME	TYPE	SECTIONS
Relationship 1	Linked Sections - Same Time Same Day Same Room	BIO001 (Bioethics) - 006 Math0010A (Calculus 1) - 001
Relationship 2	Cross Enrolled Sections	BIO001 (Bioethics) - 007
Relationship 3	Linked Sections - Same Time Different Day Same Room	BIO5300 (Ecology) - 002 undefined (undefined) - undefined
Lab Relationship	Linked Sections - Different Time	BIO5300 (Ecology) - 01 BIO5300 (Ecology) - 01L

Credits

- Depending on your school's configuration, you might or might not need to fill out the credits field in order to assign a meeting pattern.
- The Credit Hour field varies depending on whether or not the class is a Fixed or Variable Credit class.

Enrollment Capacity

Make sure all of your sections have a designated enrollment capacity. This will help ensure that the room you later select for the section is large enough to hold all enrolled students.

Room Preferences

If you define room preferences for a section, that will make it easier for you to assign rooms that fit the section's needs.

Learn More

- Check out our [Creating Section Relationships article](https://coursedog.freshdesk.com/support/solutions/articles/48001146545-relationships-setting-up-section-relationships) (<https://coursedog.freshdesk.com/support/solutions/articles/48001146545-relationships-setting-up-section-relationships>) to see different types of linked sections you can set up in Academic Scheduling; how to manage them; and integration considerations.
- Our [Relationships troubleshooting article](https://coursedog.freshdesk.com/support/solutions/articles/48001161962-relationships-troubleshooting) (<https://coursedog.freshdesk.com/support/solutions/articles/48001161962-relationships-troubleshooting>) captures common solutions.

- Learn more about credits [here](https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration#Credits) (<https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration#Credits>) and [here](https://coursedog.freshdesk.com/support/solutions/articles/48000985180-section-credits-how-do-section-credit-fields-work-) (<https://coursedog.freshdesk.com/support/solutions/articles/48000985180-section-credits-how-do-section-credit-fields-work->).
- See details about these and other potential fixed configurations [here](https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration#Configuring-Sections) (<https://coursedog.freshdesk.com/support/solutions/articles/48001212356-sections-section-configuration#Configuring-Sections>).

Assigning Instructors

PATH: Academic Scheduling > Section Dashboard > Sections

Overview

- Open the section you wish to assign an instructor to and then locate the “Instructors” card.
- Click “+ Instructor” to add an instructor.
- Once you’ve assigned an instructor, click “Set Instructor Roles & Details” to configure settings for that instructor. What you can set here will depend on how your Admin set up the Instructor Template.

Assign Instructor to CRTW201 - 004

☒ Instructors from English Department

Filter By Instructor Type

Start typing...

Viewing 1-25 of 78

NAME	TYPE	CONFLICTS	PREFERENCE FIT
T [REDACTED]	Lecturer	0	100%
R [REDACTED]	Lecturer	0	100%
A [REDACTED]	Not Set	0	100%
D [REDACTED]	Not Set	0	100%
K [REDACTED]	Instructor	0	100%

CANCEL

Editing CRTW201

DAYS

Mo and We

+ MEETING PATTERNS

Instructors

+ INSTRUCTOR

Relationships

Linked Sections

Credits

Credit Hours **required**

Set Credit Hours

Contact Hours

3

Lab Hours

DELETE SECTION

Activity

SHOW MORE CHANGES

ers edited this field 4/4/2023 9:13 AM

OURS

ers edited this field 4/4/2023 9:13 AM

W 1

210 (Classroom)

ers edited this field 4/4/2023 9:13 AM

HOURS

ers edited this field 4/4/2023 9:13 AM

ON MODE

om

ers edited this field 4/4/2023 9:13 AM

ERM

ers edited this field 4/4/2023 9:13 AM

D BUILDING

ers edited this field 4/4/2023 9:13 AM

D ROOM CAPACITY

ers edited this field 4/4/2023 9:13 AM

D ROOM TYPE

ers edited this field 4/4/2023 9:13 AM

ter to comment

Learn More

- [Assigning Instructors](https://coursedog.freshdesk.com/support/solutions/articles/48001076133-instructors-assigning-instructors) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076133-instructors-assigning-instructors>) includes step-by-step instructions.
- If you're a Banner school, follow [these instructions](https://coursedog.freshdesk.com/support/solutions/articles/48001231756-instructors-assigning-instructors-to-meetings-banner-schools-) (<https://coursedog.freshdesk.com/support/solutions/articles/48001231756-instructors-assigning-instructors-to-meetings-banner-schools->) for assigning instructors to meetings.

Assigning Meeting Patterns

PATH: Academic Scheduling > Section Dashboard > Sections > (Open Section)

Overview

- Meeting Patterns refer to class days and times (i.e., MWF 10:10-11:25am). There are two possible types of meeting patterns: Standard and Custom.
- Standard Meeting Patterns refer to prebuilt, recommended day and time combinations that maximize classroom space while promoting efficient student schedules.
- Custom Meeting Patterns refer to day and time combinations built for sections that cannot meet during standard meeting patterns.

Select Meeting Pattern

Filter By Days

S M T W R F S

Filter By Times

--:-- --:--

Filter By Attributes

Start typing...

Clear Filters

Mo, Tu, We, and Th from 8:00 PM to 8:50 AM

ATTRIBUTES

USAGE

PREFERENCE FIT

0

100%

Mo and We from 12:30 PM to 1:45 PM

ATTRIBUTES

USAGE

PREFERENCE FIT

Prime Time

0

100%

Mo and We from 2:00 PM to 3:15 PM

ATTRIBUTES

USAGE

PREFERENCE FIT

Prime Time

0

100%

Mo and We from 3:30 PM to 4:45 PM

ATTRIBUTES

USAGE

PREFERENCE FIT

0

100%

Mo and We from 5:00 PM to 6:15 PM

ATTRIBUTES

USAGE

PREFERENCE FIT

0

100%

USE CUSTOM TIMES

SELECT TBA

CANCEL

Learn More

- [Assigning Meeting Patterns](https://coursedog.freshdesk.com/support/solutions/articles/48001076137-meeting-patterns-assigning-meeting-patterns) (https://coursedog.freshdesk.com/support/solutions/articles/48001076137-meeting-patterns-assigning-meeting-patterns) includes step-by-step instructions.

- Common Meeting Pattern questions and solutions are covered in [this FAQ article](https://coursedog.freshdesk.com/support/solutions/articles/48000986413-meeting-patterns-faqs-troubleshooting) (<https://coursedog.freshdesk.com/support/solutions/articles/48000986413-meeting-patterns-faqs-troubleshooting>).
- [Read this](https://coursedog.freshdesk.com/support/solutions/articles/48001225674-meeting-patterns-setting-up-tba-standard-meetings-integrated-customers-#Usage) (<https://coursedog.freshdesk.com/support/solutions/articles/48001225674-meeting-patterns-setting-up-tba-standard-meetings-integrated-customers-#Usage>) if you're an integrated school and you'd like to assign TBA meeting patterns.

Assigning Rooms

PATH: Academic Scheduling > Section Dashboard > Sections > (Open Section)

Overview

- You assign rooms and meeting patterns in the same area of the section editing modal.
- Click into the area under “Room” to view available rooms.

ADD NEW INSTRUCTIONAL METHOD


Meeting Patterns & Rooms

DAYS	START	END	ROOM	START DATE	END DATE
Tu and Th	12:30 PM	1:45 PM	OW...	09/04/23	05/27/24

+ MEETING PATTERN

 SET DETAILS


Instructors

Learn More

- [Assigning Rooms](https://coursedog.freshdesk.com/support/solutions/articles/48001076138-rooms-assigning-rooms) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076138-rooms-assigning-rooms>) includes step-by-step instructions.
- Common Room questions and solutions are covered in [this FAQ article](https://coursedog.freshdesk.com/support/solutions/articles/48001148021-rooms-faqs-troubleshooting) (<https://coursedog.freshdesk.com/support/solutions/articles/48001148021-rooms-faqs-troubleshooting>).

Validating & Submitting Your Scheduling

PATH: Academic Scheduling > Section Dashboard > Departments

Overview

- Prior to submitting your schedule you must resolve any remaining warnings.
- When you click “Validate Schedule” next to a section, you will be directed to the Validate Schedule Modal, which displays all section and meeting pattern rule violations and conflicts in one place so you can review and resolve them.
- If the section has allowable conflicts that cannot be resolved, you can submit Rule Exceptions Requests, which will allow your schedule to be submitted with conflicts.
- After you have completed your schedule and resolved any warnings, you can submit it.
- Note that schedule validation IS NOT a process for Deans/Department Chairs to review the content of the schedule.

Section Dashboard

+ ADD SECTION

+ ADD COURSE

Search for Departments

Select Term

Spring 2022 – Current Term and Current Planning Term

SECTIONS

COURSES

CALENDAR

DEPARTMENTS

BULK ADD SECTIONS

STATUS	DEPARTMENT NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	ACTIONS
	Academic Affairs	No Schedulers	4	4	8	VALIDATE SCHEDULE SHOW SECTIONS
	Academic Computing Center	No Schedulers	0	0	0	VALIDATE SCHEDULE SHOW SECTIONS

Learn More

- Check out our [Validating & Submitting a Schedule](https://coursedog.freshdesk.com/support/solutions/articles/48001076140-schedules-validating-and-submitting-a-schedule) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076140-schedules-validating-and-submitting-a-schedule>) article.
- Learn more about submitting a [rule exception request](https://coursedog.freshdesk.com/support/solutions/articles/48001076533-requests-late-change-requests#Creating-a-Request) (<https://coursedog.freshdesk.com/support/solutions/articles/48001076533-requests-late-change-requests#Creating-a-Request>).
- Common schedule FAQs are answered [here](https://coursedog.freshdesk.com/support/solutions/articles/48000987907-schedules-faqs) (<https://coursedog.freshdesk.com/support/solutions/articles/48000987907-schedules-faqs>).

Making & Viewing Requests

PATH: Academic Scheduling > Requests

Overview

- All requests can be tracked using the Requests Dashboard.
- This dashboard replaces in-person, email, and phone requests, and allows all requests to be securely stored in a single location.
- You can filter and sort this dashboard and save your view so you don't have to recreate it later.
- There are two types of requests in Scheduling: Rule Exception and Section Change.

Workflows

- Once you submit a request, it will be routed to the right person(s) for approval via a “workflow”.
- Workflow participants can be notified via email whenever a request is routed to them.
- Workflows and workflow notifications are generally configured by an Admin.

Learn More

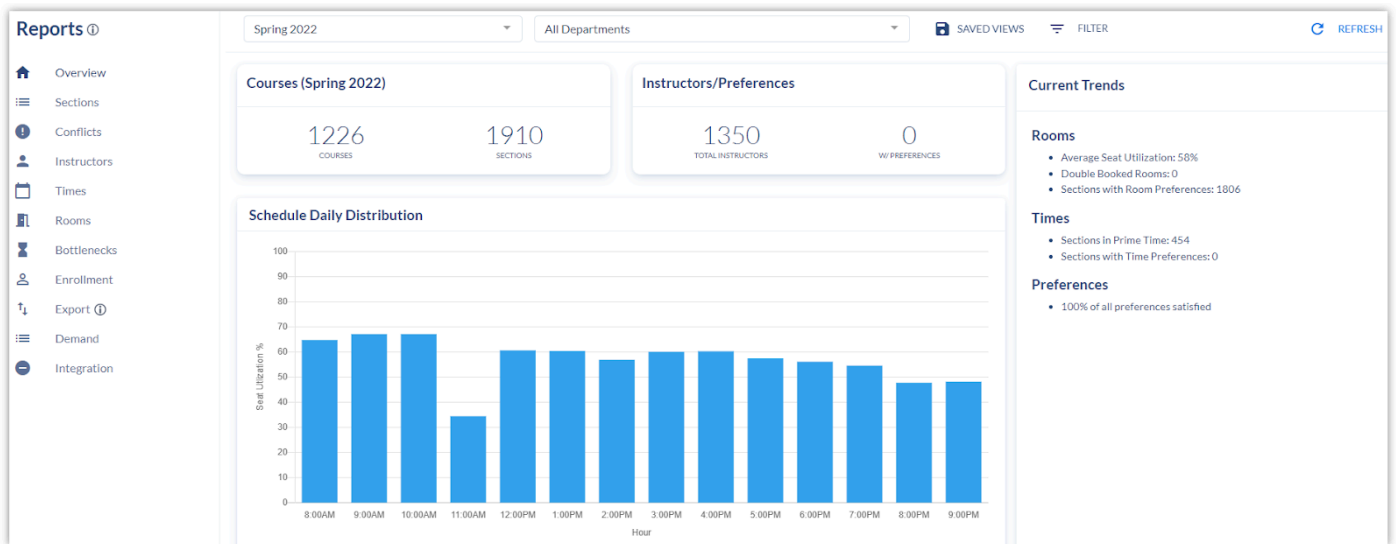
- For step-by-step guidance when creating a request, go to the Requests Dashboard and click “+ Create Request”. A pop-up should appear, asking you if you’d like help creating your request. If the pop-up doesn’t appear, you can access the flow in the In-App Guides widget instead (shown on the far right in the above screenshot).
- [Go here \(https://coursedog.freshdesk.com/support/solutions/articles/48001076533-requests-late-change-requests\)](https://coursedog.freshdesk.com/support/solutions/articles/48001076533-requests-late-change-requests) for an overview of how to create and track requests.
- Learn how you can edit requests [here \(https://coursedog.freshdesk.com/support/solutions/articles/48001185886-editing-a-request\)](https://coursedog.freshdesk.com/support/solutions/articles/48001185886-editing-a-request).
- See how requests work for both Department Schedulers and Admins in [this walkthrough \(https://capture.navattic.com/6D9NS6XR7XynM7DapaHb\)](https://capture.navattic.com/6D9NS6XR7XynM7DapaHb).

Reports

PATH: Academic Scheduling > Reports

Overview

- Coursedog provides a wide variety of out-of-box reports to help analyze sections, conflicts, instructors, times, departments, rooms, bottlenecks, and enrollment.
- Reports can serve as a useful reference during schedule planning.
- The Reports Dashboard includes the option to export many different reports (typically in CSV format).



Learn More

- [Go here \(https://coursedog.freshdesk.com/en/support/solutions/articles/48001073974-reports-reports-dashboard-breakdown\)](https://coursedog.freshdesk.com/en/support/solutions/articles/48001073974-reports-reports-dashboard-breakdown) for a breakdown of all of the different reports.
- See a list of all exportable reports, included fields and use cases for each, [here \(https://coursedog.freshdesk.com/en/support/solutions/articles/48001208029-reports-exporting-reports\)](https://coursedog.freshdesk.com/en/support/solutions/articles/48001208029-reports-exporting-reports).
- Learn more about using these reports for scheduling planning [here \(https://coursedog.freshdesk.com/en/support/solutions/articles/48001231867-reports-using-reports-for-schedule-planning\)](https://coursedog.freshdesk.com/en/support/solutions/articles/48001231867-reports-using-reports-for-schedule-planning).
- Check out our [Reports walkthrough \(https://capture.navattic.com/lXyo5QRcRMfTa0cCKHw2\)](https://capture.navattic.com/lXyo5QRcRMfTa0cCKHw2).

Additional Considerations

Phases

Overview

- Academic Scheduling offers something called “Phases”.
- This functionality gives Admins at your institution the ability to create, configure, and assign different phases that align with your overall scheduling process.
- Different phases can impact role permissions, rules, section editing permissions, and more.
- In other words: At predefined dates, various permissions and rules can change based on where you are in your scheduling cycle. You might have the permission to make a certain edit in one phase and that permission might be revoked in a later phase as the schedule is finalized.
- If your institution is using phases, you should be able to tell what Phase your institution/team is currently in via the blue oval next to Departmental Status on the home page.
- Your administrators may have also taken advantage of setting up an automatic email notification aligned with Phase change dates that will alert end users of permission changes as a new Phase begins.



This phase is for planning. Department Schedulers will have full edit permissions.

Fall 2020 All Departments **Planning Phase**

Sections By Course

Viewing 1-2 of 2

Learn More

Although geared toward Admin users, you can read more about Phases [here](#)

(<https://coursedog.freshdesk.com/support/solutions/articles/48001161270-phases-configuring-and-managing-scheduling-phases>).

Effective Dating

Overview

- If your school is integrated and utilizes Coursedog's Curriculum Management product, then you will be able to leverage Effective Dating.
- Effective Dating is something that more so concerns Admins than Department Schedulers, but it is helpful to have some idea of how it works, particularly if you notice things like course details that don't align with your expectations (often the solution is to look at effective dating).
- In Curriculum and Catalog, effective dating creates a system of revisions and versions for each curriculum object (course, program, and document type) that can be accessed within other Coursedog applications. This allows users to create and edit objects in present and future date ranges, while also creating multiple versions of those objects for each date range, allowing a school to seamlessly manage different versions of the same object.
- Revisions are created when there's an edit to a course/program/document type and the user sets an effective start date or start term for the change to take effect, so long as a revision does not already exist for that range.
- Versions are created when there's an edit to a course/program/document type where the effective dates or terms are not modified or wherever a revision with the same effective dates or terms already exists.

Learn More

- Effective Dating comes in handy when [Scheduling Multiple Terms](#) (<https://coursedog.freshdesk.com/support/solutions/articles/48001197637-effective-dates-scheduling-multiple-terms>).
- See how Effective Dating impacts [Instructors](#) (<https://coursedog.freshdesk.com/support/solutions/articles/48001073976-effective-dates-effective-dates-for-instructors>).
- See how Effective Dating impacts [Departments](#) (<https://coursedog.freshdesk.com/support/solutions/articles/48001073975-effective-dates-effective-dates-for-departments>).

Merge Error Best Practices

Overview

- It's important to review merge errors regularly (after nightly syncs or once a week during active scheduling) to catch and resolve issues.
- Department Schedulers can help keep an eye out for integration issues by using the Integrations error list found in the Integrations Hub landing page and/or looking for errors in the Section Dashboard.
 - Sections displayed in the Section Dashboard will show a "red" error icon if that section has experienced an integration error during the last merge.
 - The top of the section editing modal will also indicate if there have been any integration issues associated with that section.

Section Dashboard



Section Editing Modal

Editing EARTH201 - 001

This section encountered an **error** while syncing with the SIS on 3/30/2023 at 6:23 AM. [Click here to view details.](#)

General Information

Section Number **required** ?

CRN ?

001

79324

3 characters (1 - 3 allowed)

Schedule Type **required**

Lecture

Course Subtitle or Comment text (optional) ?

Approval (optional) ?

None

Course format **required**

Schedule Print **required**

Hybrid - In Person & Online

YES NO

Department

Earth Sciences

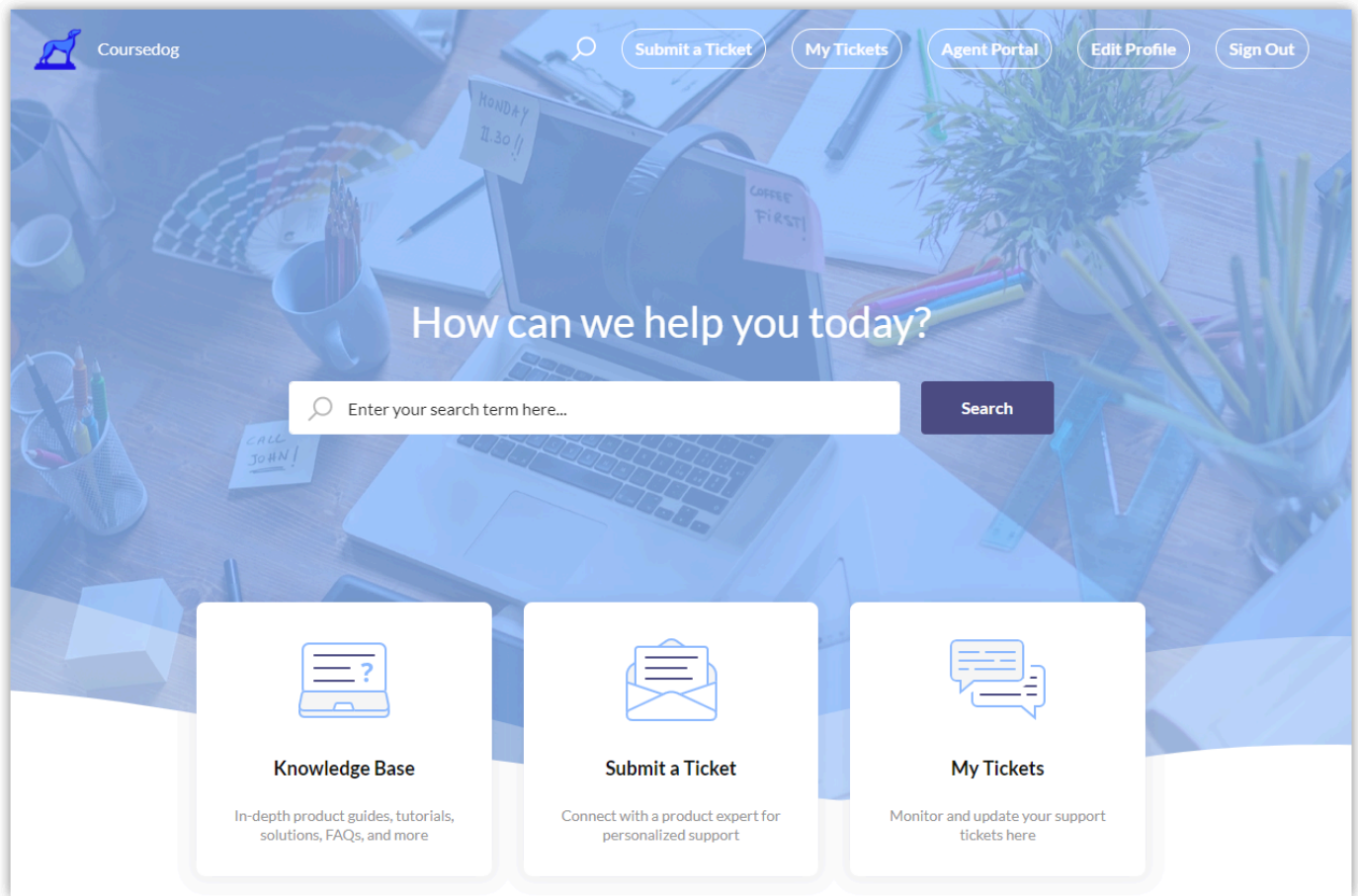
Learn More

- [Managing Your Integration](https://coursedog.freshdesk.com/support/solutions/articles/48001142294-managing-your-integration) (<https://coursedog.freshdesk.com/support/solutions/articles/48001142294-managing-your-integration>) provides an overview of merge error types, best practices, guidance on when to submit a support ticket, and ways to review merge errors.
- Common merge error FAQs are in our [troubleshooting article](https://coursedog.freshdesk.com/support/solutions/articles/48001182027-common-sis-merge-errors-and-resolutions) (<https://coursedog.freshdesk.com/support/solutions/articles/48001182027-common-sis-merge-errors-and-resolutions>).

Help & Support

Overview

- Talk to a Coursedog admin at your institution if any questions pop up; they might want to help you troubleshoot those internally before submitting a ticket to us.
- If you're in-app and have a question, you can search for answers from within our app via the ["Self Help" widget](https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help#Self-Help-Widget) (<https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help#Self-Help-Widget>).
- You can search our Knowledge Base, submit a support ticket, and check the status of an existing ticket at coursedog.freshdesk.com (<https://coursedog.freshdesk.com/support/home>).
- There are [tooltips](https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help#Tooltips) (<https://coursedog.freshdesk.com/support/solutions/articles/48001207390-in-app-help#Tooltips>) throughout Academic Scheduling. If you see an "i" icon, hover over it for a tooltip that explains related functionality and often links to a help article.
- You can see how other customers are using Coursedog via our [Community Forum](https://coursedog.freshdesk.com/support/solutions/articles/48001256526-community-forum-overview) (<https://coursedog.freshdesk.com/support/solutions/articles/48001256526-community-forum-overview>).



Learn More

The [Customer Support section](https://coursedog.freshdesk.com/support/solutions/folders/48000663172) (<https://coursedog.freshdesk.com/support/solutions/folders/48000663172>) of our knowledge base includes several articles that speak to in-app help, how our help center works, submitting and monitoring tickets, how product releases work, and more.

Related Articles

- **GETTING STARTED: How Academic Scheduling Works for Department Schedulers**
- **COURSES: Course Configuration**
- **SECTIONS: Navigating the Section Dashboard**
- **SECTIONS: Section Configuration**
- **SECTIONS: Using Instructional Methods in Scheduling (Colleague Ethos)**
- **INSTRUCTORS: Viewing & Editing Instructor Profiles**
- **INSTRUCTORS: Gathering Faculty Preferences**
- **INSTRUCTORS: Assigning Instructors**
- **INSTRUCTORS: Assigning Instructors to Meetings (Banner Schools)**
- **MEETING PATTERNS: Assigning Meeting Patterns**
- **RELATIONSHIPS: Creating Section Relationships**
- **ROOMS: Assigning Rooms**
- **SCHEDULES: Validating and Submitting a Schedule**
- **REQUESTS: Late Change Requests**
- **FILTERS: Schedule Filtering**
- **FILTERS: Room View of Calendar**