



Coursedog



WINTHROP
UNIVERSITY

COURSEDOG CLASS SCHEDULER END USER GUIDE



Coursedog Reference Guide For End Users (Department Schedulers)

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<p>End users of the Coursedog Class Scheduling product should be aware of a configuration called “Schedule Phases”. This functionality allows the administrators of your institution the ability to create, configure, and assign “Phases” that align with your overall scheduling process and associate role permissions, rules, section editing permissions, etc. that should automatically update or change depending on the phase you are currently in. For example, an end user may have the permission to make a certain edit in one phase and that permission may be revoked in a later phase as the schedule is finalized. If “Schedule Phases” has been configured you should be able to tell what Phase your institution/team is currently in within the application (see screenshot below). Your administrators may have also taken advantage of setting up an automatic email notification aligned with Phase change dates that will alert end users to permission changes as a new Phase begins. You can read details around this functionality in our Help Center article here.</p>	21
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Introduction Video

[Introduction Video](#)

Access & Login

- Coursedog works with most browsers, but Google Chrome is recommended.
- Log into Coursedog at app.coursedog.com with your institutional email address and the password provided by your Coursedog Administrator. If your institution is using single-sign-on you will be redirected to your institution’s login page where you will log in with your credentials.
- Users have the ability in their Account Settings to specify what their default term is if that is applicable (if your institution frequently schedules multiple terms at once or divides resources across terms). If a default term is specified, the user will see this term loaded when they navigate to the Scheduling Home Page or Section Editor. If a default term is not specified for a user, the current scheduling term will be used as the fallback.



Your Products



Scheduling

Build the perfect section, and room schedule. No spreadsheets required.



Curriculum

Automate curriculum approval workflows and send approved proposals directly into your catalog.



Events

Minimize manual work to schedule events from start to finish.



Catalog

Build the perfect catalog. Automatically integrated with curriculum.

Terms

Default term

App default term ▼

- Notification preference (frequency) from the system can also be managed here as well

Request Email Notification Preferences

PRODUCT	IMMEDIATE	DAILY DIGEST
Admin	<input type="radio"/>	<input type="radio"/>
Catalog	<input checked="" type="radio"/>	<input type="radio"/>
Curriculum	<input checked="" type="radio"/>	<input type="radio"/>
Events	<input checked="" type="radio"/>	<input type="radio"/>
Scheduling	<input checked="" type="radio"/>	<input type="radio"/>

Homepage & Dashboard

- After logging into Coursedog you will be directed to the homepage (pictured below). To navigate within the platform use the Dashboard on the left to navigate between:

- ☐ **Home**
- ☐ **Section Editor**
- ☐ **Requests**
- ☐ **Rooms**
- ☐ **Reports**



- Regardless of your location in the platform, you can select the three parallel lines in the upper-left corner to expand the Dashboard, or the Coursedog Logo/Your

NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	STATUS
Biological Sciences	Mara Koval	7	10	2	In Progress

Institution's Name to return to the home page

Additional Homepage Features

- **Help Center** - Coursedog 'How-Tos' and Help Documentation - See Freshdesk below for more information on the Coursedog Help Center.
- **Lighting Bolt** - Recent Product Updates - A red 'dot' indicates that new updates have been added to the product since you were previously in the platform.
- **Notifications** - Relevant Messages - Look here for a holistic view of messages on the status of change requests, schedule workflow, etc.,
- **Grid** - Coursedog Product Navigation - If your institution has purchased additional Coursedog products you can navigate to them here (i.e. Curriculum, Events, or Catalog)
- **User** - Account Information - Navigate here to view your Account Settings (this is helpful if you want to change your name or password) or Log Out.
- **Departmental Status** - This section of the home page provides a high-level overview of departments you are associated with, including the number of courses

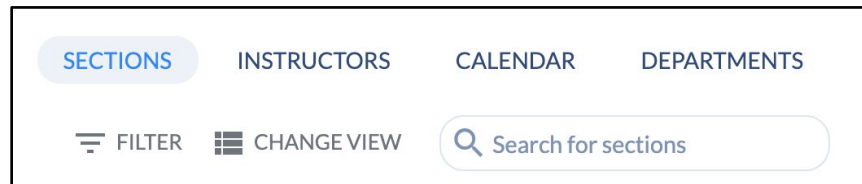


and sections to be scheduled, the number of scheduling conflicts, and the schedule status for the current scheduling term

Section Editor

In Coursedog the Section Editor is where the schedule is built. The Section Editor can be navigated to through the Dashboard and presents the user with a list of each course a Department is offering in a given semester.

Section Editor Navigation



- **Sections-** Under Sections you will be able to perform all of the below tasks. This reference guide will walk through how to perform each task below.
 - Add sections or cancel sections
 - Edit sections (make scheduling assignments)
 - View course and section information
 - View scheduling rule violations
 - The Admins of your Coursedog system have set-up scheduling rules that will automatically be flagging issues found in sections.
 - You will find below more reference information regarding submitting "Requests" should you run into a rule violation that you would like to submit a request for exception.
 - Validate schedule
 - Submit schedule
- **Instructors-** view instructor profiles and instructor scheduling assignments
- **Calendar-** view department schedule by calendar, list, or rooms
- **Filter-** selectively view schedule by applying customizable parameters



Where Section Type Contains Lab

And Credit Hours Contains 1

+ ADD FIELD

SAVE CANCEL

- **Change View**- view by sections or view another term
- **Search**- search for courses, sections, or instructors (note that to search for instructors you must be on the 'instructors' tab)

Instructions for Department Schedulers

- **Select Semester/Term**

- The Section Editor defaults to the current scheduling term. If you would like to view a different semester you can navigate to one by selecting the term name, and then selecting a different term name from the drop-down

Winthrop University

View a different term

Spring 2022 All Departments

Sections By Course

Viewing 1-25 of 1202

Set viewing term as...

Select a term

Fall 2022

Spring 2022 – Current Planning Term

Fall 2021 – Current Term

- **Editing Sections**

- The default view, **View By Courses**, provides a list of all possible courses within a department that could be scheduled in the given semester



- Selecting the **Arrow** to the left of the **Course Name** expands the course information so that you can see the Course Description, Linked Sections, and Course Info

COMP1010

Introduction to Computer Applications

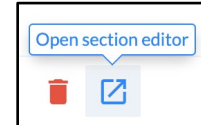
Course Description

Introduction to Computer Applications is a university transfer course intended to provide stud...

COURSE INFO

SECTION	INSTRUCTORS	DAYS	START	END	ROOM
001	Not set	Mo, We, and Fr	10:00 AM	10:50 AM	Not se
002	Not set	Mo, We, and Fr	9:00 AM	9:50 AM	Not se

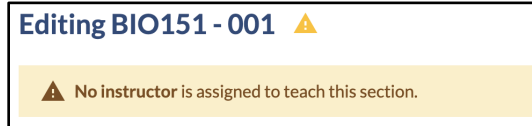
- To edit a section, hover over the section's section number and click the blue icon that appears in order to open the **section editor modal**.



- A **yellow alert triangle** will appear next to Course Name and Section Numbers that are in violation of scheduling rules set by the Admin. This typically indicates that something is missing or in conflict with something else. You may hover over the triangle at the section level for a note about what the issue is. You may resolve the issue by addressing the appropriate/related field on this page or within the Section Editor Modal for the section (blue icon to open).

- **The Section Editor Modal** The Section Editor Modal contains all of the information about a section. You can edit the section here for scheduling purposes.

- **Alerts** will display at the top of the modal so that department schedulers can easily identify what information is missing or in violation of a rule.



■ General information

For more detail around any of the topics covered below regarding scheduling via the Section Editor in Coursedog end users can refer to more thorough documentation in our [Help Center](#). The Help Center information is furthermore kept up to date as the application adds additional features and functionality that may have evolved past the date this user guide was provided to your institution.

- **Section Number**- Unique identifier for each section under a course. Often will be sequential i.e., 001, 002, 003
- **Section Status**- ex: Active, Inactive



- **CRN** - Or Course Reference Number, sometimes used by students when registering for a course.
- **Instruction Mode**- Most frequently 'In Person,' 'Online,' or 'Hybrid'
- **Campus**- College campus associated with the section
- **Grade Mode**- Most often 'Letter,' 'Pass/Fail,' 'None'
- **Part of Term**- Only applicable to institutions with sub-terms i.e., Summer I, Summer II, Summer III
- **Section Type**- Most often 'Lecture,' 'Lab,' 'Seminar,' 'Discussion,' etc.,

General Information	
Section Number 001	Instruction Mode In Person
Call Number 17653	Campus Main
Grade Mode Letter	Part Of Term Set Part Of Term
Section Type Lecture	

■ Meeting Patterns & Rooms

● Meeting Patterns

In Coursedog, Meeting Patterns refer to class days and times (i.e., MWF 10:10-11:25am). There are two possible types of meeting patterns:

- **Standard Meeting Patterns** refer to pre-built, 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. Note that many institutions will require justification for selecting a custom meeting pattern when submitting the schedule (this can be done through a Request).

Adding a Meeting Pattern

- Select **+Meeting Pattern** to add a time block (one of the

Meeting Patterns & Rooms +			
DAYS	START	END	ROOM
Mo, We, and Fr	10:00 AM	10:50 AM	Not set
+ MEETING PATTERN			

standard meeting patterns) to your section or edit the time block that is present.



- You will be directed to the **Select Meeting Pattern** modal.

Select Meeting Pattern [X]

Filter By Days S M T W R F S

Filter By Times --:-- -- --:-- --

[Clear Filters](#)

Mo, We, and Fr from 9:00 AM to 9:50 AM [i]		
ATTRIBUTES	USAGE	PREFERENCE FIT
Non-Prime Time	4	90%

Mo, We, and Fr from 10:00 AM to 10:50 AM [i]		
ATTRIBUTES	USAGE	PREFERENCE FIT
Prime Time	3	90%

Here you can see standard meeting patterns, with additional filters allowing you to sort through the time blocks efficiently.

- Add a meeting pattern to a section by simply selecting it. You may add multiple meeting patterns to a section, but the type of meeting pattern, either standard or custom, must be consistent across them.
- The provided list of meeting patterns is optimized to show up in an order that brings the best fit or more scheduling efficient meeting patterns to the top of the list.
 - Each meeting pattern shows information on the department's usage of that meeting pattern and the percent fit with any preferences specific to that class. Note that usage is important to track in order to avoid time and room bottlenecks. You can additionally hover over the 'i' in the upper-right corner for any meeting pattern specific notes.
- You can remove a meeting pattern by hovering over it and selecting the red circle icon to the left of it.
- You may select **Use Custom Times (the blue stopwatch icon to the right of +Meeting Pattern)** to enter a custom time block or **Select TBA** at the bottom of the modal, however, doing so will erase any previously selected standard meeting patterns from the given section. It may also impact a rule violation.

Rooms

In Coursedog, there are **Centrally Owned Rooms** and **Department Owned Rooms**. When making room assignments, Department Schedulers will have access to the rooms that have been assigned to



their Departments, in addition to the centrally owned rooms that have been released for scheduling.

Adding a Room

- Hover over the **Room** field under **Meeting Patterns & Rooms** to add a room to your section. If there is no room currently assigned, **Not Set** will appear in the field.
- You will be directed to the **Assign Room** modal. Here you can see all available rooms, with additional filters and a search feature, allowing you to sort through the rooms efficiently. If you toggle **Show Only Available Rooms** to off you will be able to access Unavailable rooms and details about their unavailability, such as double-bookings.
- Each room includes information on the percent fit with any preferences specific to that class, in addition to preferences specific to the instructor if an instructor is already assigned. Hover over the 'i' in the upper-right corner for details on percent fit.
- You may also select **Use No Room** or **Select TBA** at the bottom of the modal. Use No Room is most often used if the section does not need a room assignment, such as an Independent Study Course. Select TBA indicates that this class does need a room, however for whatever reason it cannot be assigned one at this time. Note that many institutions will require justification for selecting either of these field options when submitting the schedule.

Assign a room

Room	Capacity	Preference Fit
MH 201 (This room is not available)	25	35%
GH 12 (This room is not available)		

Assign Room to COMP1010 - 001

Show Only Available Rooms

Lecture Filter By Features

Start typing...

Viewing 0-21 of 21

Room	Capacity	Preference Fit
MH 210	30	69%
MH 214	30	69%
MH 202	25	58%

SELECT NO ROOM SELECT TBA CANCEL

Assign Instructor to COMP1010 - 001

Instructors from Business Administration Department All Instructors

Filter By Instructor Type

Start typing...

Viewing 0-6 of 6

Instructor	Conflicts	Preference Fit
Garrott Izon	0	100%
Michael Phillips	0	100%
Suzy Pile	0	100%

CANCEL

Instructors

- Select **+Instructor** to open the **Assign Instructor** modal
- Here you can see all available and unavailable instructors within your department, with additional filters and a search feature, allowing you to sort through the instructors efficiently. If you toggle **Instructors From Department X** to off you will additionally be able to see instructors from outside of your Department.
- Each instructor includes information on the percent fit with any preferences specific to that class or room, in addition to their availability during the selected meeting patterns. Any teaching conflicts are additionally visible.
- After selecting an instructor or multiple instructors, select **Set Instructor Roles** to indicate whether they are the Primary Instructor, TA, Supervisor, etc.,

Instructors +

Instructor	Conflicts	Preference Fit
Suzy Pile	0	100%

+ INSTRUCTOR SET INSTRUCTOR ROLES



Relationships

In Coursedog, **Relationships** are used for defining time or room relationships between sections (i.e., these sections should both be taught at the same time, these sections should be taught on the same day and in the same room, etc.). Section Relationships is a very important card to fill out prior to assigning meeting patterns and rooms as it can impact the choices.

Adding and Deleting a Relationship

- To create a relationship between sections, select **+ [Available Relationship Type]** in the Relationships Card, then select a **Course** and **Section**
- You then will be prompted to select a room or time **Relationship** such as non-overlapping, same time, different day, etc.,
- The relationship will then clearly appear within the Section Editor modal.
- You can delete one of these relationships by clicking the red delete button to the left of the relationship. If you delete a linked section, the relationship will be deleted for the section and the sibling automatically.

Note: Only Cross-listed Relationships Currently Supported in the Integration

- Regarding section relationships, Coursedog platform only supports cross-listed relationships for integrations currently.
- Below relationship types are not currently supported and must be inputted directly in the SIS.
 - Linked, Stacked, / Co-convening, CoRequisite, PreRequisite and Spanned
- If added in CD they will be wiped upon merge.
- **Recommendations:**
 - Where a relationship such as linked sections exists in the schedule the department scheduler should review the SIS to ensure the sections are not set as overlapping (preventing enrollment) and the enrollment caps (esp for linked sections (e.g. labs)) are set correctly



- It is recommended to investigate if adding Time, Instructor and Room override flags in your SIS is advised to eliminate errors.

Credits

The Credit Hour field varies depending on whether or not the class is a **Fixed** or **Variable Credit** class. For the majority of institutions these fields will be locked and not editable.

- **Fixed** credit courses display the credit hours assigned to the class.
- **Variable** credit courses display the minimum and maximum credit hours assigned to the course.
- You will be able to select "Switch to [opposite credit type]" at the bottom of the modal to change and edit.

Two screenshots of the 'Credits' modal. The left screenshot is for a 'Fixed' credit type, showing 'Minimum Credit Hours' and 'Maximum Credit Hours' input fields, both with 'Set' as a placeholder. Below the fields is a button labeled 'SWITCH TO FIXED CREDITS'. The right screenshot is for a 'Variable' credit type, showing a 'Credit Hours' input field with the value '3'. Below the field is a button labeled 'SWITCH TO VARIABLE CREDITS'.

Enrollment Settings

- Set class size, noting the size of the selected room. To optimize classroom space, the room capacity should be as close to the section's maximum enrollment as possible. If the class size is larger than the selected room's capacity, a warning will appear at the top of the screen.

MH 205B's capacity is lower than this section's max enrollment capacity.

- The **Waitlist** is enabled by default. To disable the waitlist, set the waitlist field to 0.

A screenshot of the 'Enrollment Settings' modal. It contains three input fields: 'Enrollment Capacity' with the value '25', 'Actual Enrollment' with a dash '-', and 'Maximum Waitlist Capacity' with the value '15'.



Room Preferences

Sections have associated room preferences which help with manual and optimizer room assignments. These preferences include **Preferred Room Type**, **Preferred Building**, **Preferred Room Capacity**, and **Preferred Room Features**.

The screenshot shows a form titled "Room Preferences". It contains four main sections: "Preferred Room Type" with a dropdown menu set to "Lab"; "Preferred Building" with a dropdown menu set to "Mellon Hall"; "Preferred Room Capacity" with a button labeled "Set Preferred Room Capacity"; and "Preferred Room Features" with two buttons labeled "Computers" and "Projector", followed by a dropdown arrow.

Other Settings

Other settings will primarily be institution-specific, and variable across schools. Some potential settings include **Special Approval**, **Section Requirements/Restrictions** and **Notes**.

Feature Spotlight: Activity

Within the **Section Editor Modal** you will find an "**Activity**" tracker on the right-hand side. This records editing activity for a section version history capturing all changes made to the section within Coursedog. Comments can also be added to elaborate on any changes made.

*Any changes made outside of Coursedog will not be reflected here.

The screenshot shows the "Editing BIO1300 - 01" modal. On the left is the "General Information" section with fields for Section Number (01), Call Number (242424), Grade Mode (Pass/Fail), and Section Type (Lecture). On the right is the "Activity" tracker, which is a table with columns for "Activity" and "Time". It lists several changes made by "Nick Chan" and "Jacquelin Andrews", including updates to "INSTRUCTORS: ROW 1", "ROOM: ROW 1", and "ENROLLMENT CAPACITY".

Feature Spotlight: Calendar Views

In the **Section Editor** Coursdog offers several calendar views to aid you in your schedule planning and help you visualize the schedule being created. Navigate to the calendar views by clicking on "**Calendar**" in the top right list of options in the Section Editor (alongside Sections, Instructors and Departments). From there you can toggle between a calendar view (screenshot below), a list view (list of all sections sorted by day and time) and a room view (a list of all rooms and assigned sections by day and time).



Fall 2020-21 All Departments

Calendar

View: CALENDAR LIST ROOMS

COLOR BY SECTION

Viewing 1-28 of 28 Meetings

FILTER Search For Courses

< PREVIOUS NEXT >

DAY	7AM	8AM	9AM	10AM	11AM
Sunday					
Monday			BIO186 (Fundamentals of Cell and MATH101 (Intro Math For Freshmen)	BIO153 (Fundamentals of Ecology and Evolution) - 001 BIO186 (Fundamentals of Cell and Molecular Biology) - 002 MATH115 (Linear Algebra) - 001	BIO188 (Fundamentals of Physiology) MATH101 (Intro Math For Freshmen)
Tuesday		BIO151 (Introduction to Quantitative Modeling in Biology (Basic)) - 001L		BIO152 (Introduction to Quantitative Modeling in Biology (Advanced))	
Wednesday			BIO186 (Fundamentals of Cell and MATH101 (Intro Math For Freshmen)	BIO153 (Fundamentals of Ecology and Evolution) - 001 BIO186 (Fundamentals of Cell and Molecular Biology) - 002 MATH115 (Linear Algebra) - 001	BIO188 (Fundamentals of Physiology) MATH101 (Intro Math For Freshmen)
Thursday		BIO151 (Introduction to Quantitative Modeling in Biology (Basic)) - 001L		BIO152 (Introduction to Quantitative Modeling in Biology (Advanced))	
Friday			BIO186 (Fundamentals of Cell and MATH101 (Intro Math For Freshmen)		BIO188 (Fundamentals of Physiology) MATH101 (Intro Math For Freshmen)

Help

● Adding Courses and Sections

○ Adding a Course

- To add a Course within the Coursedog platform From *Section Editor* select your department, then **+Course**, and select **"Add Course from Course [or Curriculum] Inventory"**. This will allow you to add, and schedule, Courses which were not included as part of the Term roll, but are available this term.

- You will also see a "Add New Course" option after selecting + Course. In an integrated environment it is a best practice **not** to utilize this functionality, nor to edit or delete Courses in Coursedog. Typically the Course Template will have Course information (fields) locked via permissions to prevent editing.

Add Course ×

[ADD NEW COURSE >](#)
[ADD COURSE FROM CURRICULUM INVENTORY >](#)

CLOSE

■ Adding a Section

- To add a section open the appropriate Course, select **+Section** at the top above the list of existing sections. The Section Editor Modal will appear - fill out all relevant information.

Fall 2020-21 Biology Department

Sections By Course [+ COURSE](#) [VALIDATE SCHEDULE](#)



- Resolving Merge Errors

To identify, review and resolve merge error issues you have several options.

Reports

Overview

Sections

Conflicts

Instructors

Times

Departments

Rooms

Bottlenecks

Enrollment

Export

Integration Errors

2021 Fall Term

All Departments

SAVED VIEWS

FILTER

REFRESH

Integration Errors Summary

416

NUMBER OF ERRORS

14.9%

PERCENT OF SECTIONS WITH ERRORS

Integration Errors

Viewing 1-50 of 416

< PREVIOUS

NEXT >

COURSE CODE	SECTION NUMBER	CALL NUMBER	NUMBER OF ERRORS	LAST SYNCED AT
AAS 4905	MFA	34994	1	4/16/2021 at 5:50 AM
AAS 4906	CMWA	34995	1	4/16/2021 at 5:50 AM
ACC 3100	TTRA	28230	1	4/16/2021 at 5:50 AM
ACC 3200	HTRA	28231	1	4/16/2021 at 5:50 AM
ACC 3202	JMA	28234	1	4/16/2021 at 5:50 AM
ACC 3202	KMA	28236	1	4/16/2021 at 5:50 AM

2) Sections displayed in the Section Editor Dashboard will show a "red" error icon if that section has experienced an integration error during the last merge:

008

Not set

 This section encountered an integration error. [set](#)

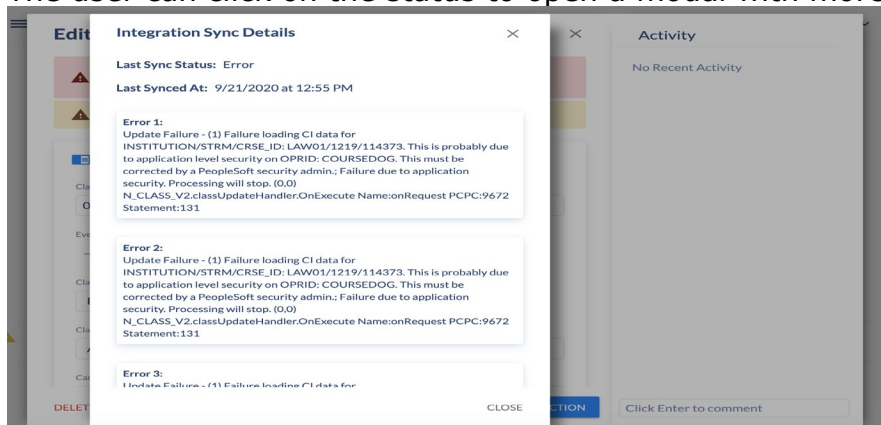
They will also indicate a merge error within the section's Section Editor



This section encountered an error while syncing with the SIS on 9/21/2020 at 12:55 PM. [Click here to view details.](#)



The user can click on the status to open a modal with more details:

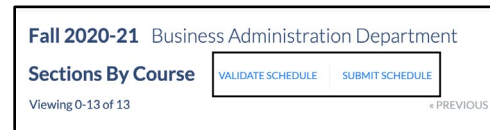


As you work to resolve merge errors each term read more in our Help Center around [Managing Integration Merge Errors](#), reach out to your Coursedog representatives for help as needed (in identification and resolution), and refer to or ask for our SIS specific guides that speak to [common merge errors and resolution steps](#).

● Validate & Submit Schedule

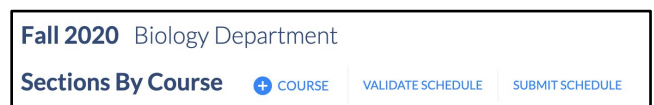
After you have completed your schedule it must be **Validated** and **Submitted**.

Note that validation and submission must occur in line with your institution's scheduling timeline, visible on the homepage. Validation and Submission occurs within the **Section Editor**.



Validate Schedule

- Prior to submitting your schedule **you must resolve any remaining warnings**.
- You can identify rule violations and conflicts, as discussed above, as you go or one by one by scanning courses and sections for yellow alert triangles, and hovering over them to display section-specific warnings.
- For a more efficient review, you can click **Validate Schedule** at the top of the Section Editor page. You will be directed to the Validate Schedule Modal, which displays all section and





meeting pattern rule violations and conflicts in one place by category so you can quickly run through each and resolve them.

Submit Schedule

- After all conflicts have been resolved, click **Submit Schedule** (found at the top of the Section Editor). At this point, the schedule should be as complete and accurate as possible.
- If the section has allowable conflicts that cannot be resolved you can submit **Rule Exceptions Requests**, which will allow the schedule to be submitted with conflicts.

Review Schedule Conflicts
As of 09/15/2020 12:53 PM

SECTION RULES MEETING PATTERN RULES PREFERENCES

⚠ No Instructor (10)

ACCT1110: Section 0101 – No instructor is assigned to teach this section.
ACCT1110: Section 0103 – No instructor is assigned to teach this section.
ACCT1110: Section 0104 – No instructor is assigned to teach this section.
ACCT1110: Section 0105 – No instructor is assigned to teach this section.
ACCT1110: Section 0106 – No instructor is assigned to teach this section.
COMP1010: Section 002 – No instructor is assigned to teach this section.
COMP1010: Section 003 – No instructor is assigned to teach this section.
ECON1010: Section 001 – No instructor is assigned to teach this section.
MGMT0100: Section 001 – No instructor is assigned to teach this section.
MGMT4001: Section 101-101 – No instructor is assigned to teach this section.

⚠ No Room 1

CONFLICT	COURSE CODE
There are 2 meeting times without a room.	BSC240

SUBMIT RULE EXCEPTION REQUEST

All section conflicts must be resolved before you may submit your schedule.

SUBMIT SCHEDULE

Change Requests

The **Requests** tab in the dashboard (left hand navigation) is a central location to submit and track requests (such as rule exception requests and section change requests) following, or in advance of, schedule submission. It is a tool for working through resolving flags/issues/warnings with your schedule that you may need exceptions to be made for or for simply submitting edits to the schedule that require approval.

Requests

+ CREATE REQUEST FILTER SORT BY Date Created Search For Requests

Vote Required 0 Assigned To Me 0 Created By Me 0

Make sure that your requests fit within the scheduling timeline outlined by your institution. For most schools, the request portal replaces in-person, email, and phone requests, and allows all requests to be securely stored in one, accessible location.



Submit a Request

- As noted under the **Submit Schedule** portion of this reference guide (above) you can submit/create your requests directly in the **Section Editor** and then they will show up here, in the **Requests** module, for review, approval and tracking.
- You can also navigate directly to this module to submit requests by clicking **+Create Request** at the top of the screen (see more instructions below).
- You'll be walked through a step-by-step request submission process that will guide you to provide the necessary information for reviewers based on the type of request you are making (ex: Rule Exception vs. Section Change (ex: Edit, Add, Delete)).
 - *Rule Exception*
 - Coursedog enforces certain rules (ex: non-standard meeting patterns or no room). If you believe you have an approved exemption to a rule, you can submit it here.
 - *Section Change*
 - Section change requests allow you to add, edit, or delete a Section. You can request edits to any data field in a particular section. First, select a **Section**, provide a **Reason** for the request, and then make any requested edits in the input fields. Note that these input fields are identical to the fields in the **Section Editor**.

Request Workflow

- After requests are submitted, the status can be tracked on the **Requests** page under **My Requests**. You additionally will receive notifications for any status changes.
- Once approved, these changes will be automatically updated in Coursedog.

NAME	REQUEST TYPE	DECISIONS	STATUS
BIO151 - 001L Introduction to Quantitative M... <small>Added a few seconds ago by Mara Koval</small>	Section Change	✔	Approved

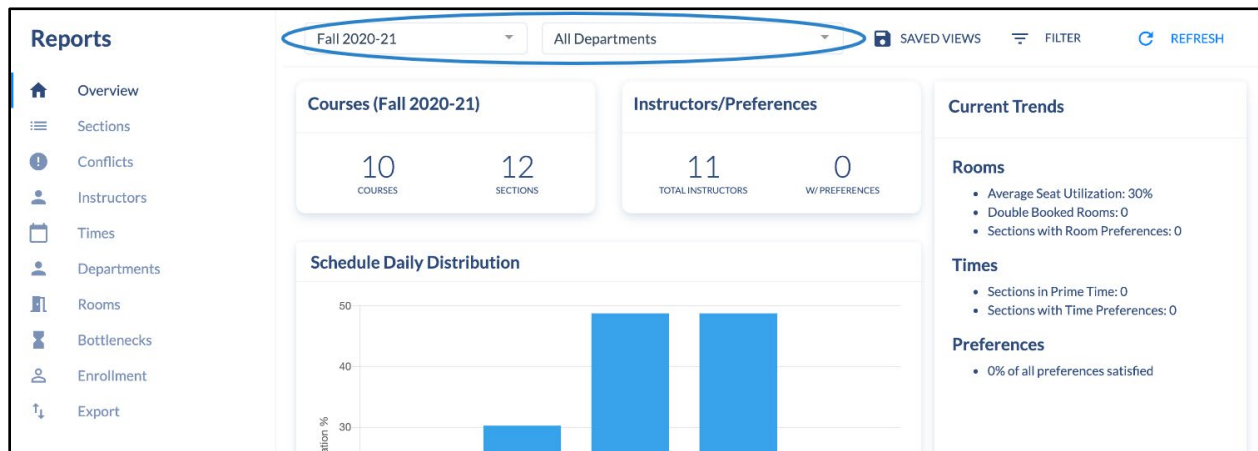
- If you are a user who also has the responsibility/permissions to approve certain requests made in the system please consult the Admin User Guide (or our [Help Center](#)) for an overview and details on Request approvals and management.

Reports

Under the **Reports** section on the Dashboard (left hand navigation) Coursedog provides a wide variety of out-of-box reports to help analyze instructors, times, departments, space and more. Users can navigate between reports on the left hand side of the screen and there are a few different ways to filter reports as well. These reports are intended to provide



insight and inspiration into building a better, more balanced, more student-centric schedule. [Find more information about reports and functionality on our Support platform in Freshdesk.](#)





Schedule Phases

End users of the Coursedog Class Scheduling product should be aware of a configuration called "Schedule Phases". This functionality allows the administrators of your institution the ability to create, configure, and assign "Phases" that align with your overall scheduling process and associate role permissions, rules, section editing permissions, etc. that should automatically update or change depending on the phase you are currently in. For example, an end user may have the permission to make a certain edit in one phase and that permission may be revoked in a later phase as the schedule is finalized. If "Schedule Phases" has been configured you should be able to tell what Phase your institution/team is currently in within the application (see screenshot below). Your administrators may have also taken advantage of setting up an automatic email notification aligned with Phase change dates that will alert end users to permission changes as a new Phase begins. You can read details around this functionality in our Help Center article [here](#).

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Nick's College (Dev)

HELP CENTER

Scheduling Management

Home

Requests

Section Editor

Preference Forms

Reports

Relationships

Runms

Restrict Department Access

7/20/2019

Final Planning

8/30/2019

Push to SIS

10/20/2019

Test Department Access

Change

3/5/2020

Test

3/9/2020

Review

10/5/2020

Departmental Status (Fall 2020)

Planning Phase

Search for departments

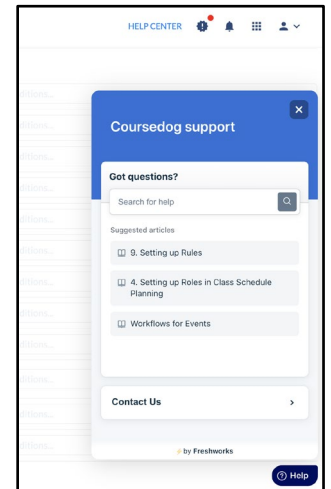
NAME	SCHEDULERS	COURSES	SECTIONS	CONFLICTS	STATUS
Biology	Dept Scheduler	1	2	0	In Progress
English	No Schedulers	0	0	0	Not Started
History	No Schedulers	0	0	0	Not Started
Math	Dept Scheduler	1	2	0	Submitted



Help & Contact Information

- **Freshdesk**

- Freshdesk is our Support command center. You can visit it directly and bookmark it: Coursedog.freshdesk.com or you can get to it easily from the application (click on **Help Center** at top right of the application to be directed straight to **Freshdesk**).
- You can also interact with it without ever leaving the app through the **Help** widget at the bottom right.
- Freshdesk focuses on three types of support:
 - **Documentation**
 - Freshdesk is your go-to for help documentation, how-to articles and best practice suggestions.
 - Use the search functionality to help find relevant content for your question or need or pursue through the many help articles and videos housed there to start becoming a super-user!
 - **Support Tickets**
 - You can file a request for support (answer a question, submit a bug or an issue, etc.) via Freshdesk. On the Freshdesk main page there is a **Submit Ticket** button. The **Help** widget at the bottom right also contains this ability.
 - **Feature Requests**
 - Feature requests can be submitted through the same means as the support tickets. Simply identify the type as "Feature Request".



- **Institutional contact (your CSM)** - is also a great resource for scheduling and training specific questions. Your team that you can reference is:

Name	Title	Email
Kara Traverse	Assistant Registrar	traversek@winthrop.edu
Donna Guerra	Scheduling Assistant	guerrad@winthrop.edu