Departmental Schedule Validator (DSV) Procedure Manual

What is the DSV?
The Departmental Schedule Validator (DSV) is an application used by departments to submit scheduling requests to the Office of the University Registrar (OUR), which then updates class information in PeopleSoft. The application checks for compliance with the Course Scheduling Policy and tracks requests.

How do I access the DSV?

**DSV Access**
To gain access to the DSV:

1. Submit a SISS Access Request form to gain access to SISS systems including STORM and the DSV. [www.sissoffice.duke.edu/requestforms/accessreq.html](http://www.sissoffice.duke.edu/requestforms/accessreq.html)

**Logging In**
Log in to STORM and go to the Department Center. The link to the DSV is in the upper left side of the page. Your NetID and password are required to log in.

URL: [https://www.siss.duke.edu/dsv](https://www.siss.duke.edu/dsv)
The DSV Interface
Section 1: The Logo

Click the DSV logo to select a schedule and term to view. You will have access to the department schedules you are responsible for, which is typically only one. Only the schedules you have access to will appear in the dropdown box. You can view schedules starting with the 2007 Spring term.

Section 2: Schedule Status and Info

Once a schedule is selected, the top of the schedule page will display the department, term and schedule you are viewing.

Department Term Schedule
Linguistics 2017 Spring Term > Linguistics
Section 3: Scheduled Courses

All classes that are scheduled for the selected term are listed in a table, with each section on its own row. The main schedule view displays the following information:

- **Course**: subject, catalog #, short title
- **Time/Location**: meeting pattern, classroom
- **Instructor**: instructors
- **Max. Enrl/Credits**: enrollment capacity, units of credit
- **Crosslistings**: all crosslisted classes for the term

You have the option to edit or delete each section.

Section 4: Options: Add Courses to Schedule

The Options menu allows you to add classes to your schedule in 3 ways:

- **Add a new course**: manually add classes, one section at a time
- **Upload/download**: upload schedule from a spreadsheet or download schedule to a spreadsheet
- **Import from previous term**: select classes from previous terms and import class information, then edit; this is the preferred method for creating schedules
- **Change schedule/term**: click to change the schedule and term you are viewing
Section 5: Status

The status section shows whether your schedule is VALID or INVALID based on the Course Scheduling Policy. You can view details for more information or mark eligible to see which courses count toward validation on the main schedule view.

Below the status, the send to registrar link will be available when your schedule is VALID and ready to submit. This area also displays information about when the schedule was last submitted and released and by whom.

Section 6: Non-Owned Cross Listed Courses

At the bottom of the schedule, you can view Non-Owned Cross Listed Courses. These are courses that are owned and scheduled by other departments. The class is scheduled by the department owning the subject in the far left column. All crosslists are listed in the far right column. The courses in this section are listed in numerical order by the classes in your department.
Course Scheduling Policy
Visit the Registrar’s Office website to familiarize yourself with the University Course Scheduling Policy: http://registrar.duke.edu/faculty-staff/course-schedule-policy

Adding classes to the schedule
At the beginning of the scheduling cycle, the schedule will be blank. From here you can either add classes manually, upload from a spreadsheet, or import from a previous term.

Import classes from a previous term
This method is the most time efficient if you are adding a large number of sections that were offered in previous terms.

Procedure:
1. Click on the Import from previous term link under the Options on the right side of the screen. From here you will see a page that has a listing of previous terms. The four-digit number in parentheses is the PeopleSoft code for that term.
2. Select the term that you want to import courses from. You can import classes from multiple terms, but you can only view one term at a time.
3. Once you select a term, you have the option of rolling in all or some of the classes from that term. To select a class, check the box in front of it. To unselect a course, click the box again to remove the check. To select all classes, check the box next to All? at the top of the list. Once you import the classes, you can import additional classes from a different term. If you want most of the classes from a term, you can check the All? box, then go down the list and uncheck the sections you don’t want.
4. After you have selected the classes you want to roll, scroll to the bottom of the page and choose the schedule to import the courses to. The drop down menu defaults to the primary schedule. When you are ready to import the classes, click the Copy Classes button.
5. After the import has processed, a feedback screen will be displayed with a breakdown by section, with a detailed report for each offering. The message “No meeting times found that match standard blocks times” is common and means the particular section had a custom end time and the meeting pattern will need to be added manually.
6. Scroll to the bottom of the screen and click Return to Schedule to see your imported schedule. To import additional classes from another term, click the import from previous term link and repeat the process.
**Important Notes:**

1. When classes are imported, they are checked against the course catalog to confirm that they are still active and to update any information that may have changed since the term you selected (e.g., an added crosslist or credit change).
2. You will notice that lecture sections (001, 002, etc.) do not appear, but the labs and discussions do. Select the desired labs or discussions and their attached lectures will import automatically.

**Upload an Excel Spreadsheet**

To upload your schedule from an Excel spreadsheet, click **upload/download** under the **Options** on the right side of the page.

On this page, there are separate links for uploading and downloading. The file format for uploading is CSV, the same as the format of the Download file. To ensure your upload file is formatted correctly, it is highly recommended that you use the download file as a template. The following criteria must be met so classes are added correctly:

- File must be saved as CSV format in Excel (Mac users might have to save as ‘CSV for windows’)
- Columns and headers must match those in the Download file
- Cross-listed courses must be entered manually
- Leave instructors blank if unknown
- Separate multiple instructors with a semicolon

**Tip** Download the Excel file from a previous term’s schedule if you don’t want to start from scratch.

**Add a New Course – Manual Entry**

To manually add a new course, click on the **add a new course** link and go through the steps to add details about the new class. There are four panels that must be completed for each class: Main Details, Time/Location, Crosslisting/Pairing, Component Courses

**Main Details Tab**

You will start on the **Main Details** panel where you will enter the following information:

- subject (if there are multiple subjects in your department)
- course number
- section number
- enrollment
- number of credits
- topic title if applicable
- instructor(s)
• consent (a course must have consent in the catalog for you to modify consent on the schedule)
• component (independent study, study abroad, etc.)
• notes for the Registrar’s Office (this can include room requests, reserve caps, clarification of meeting patterns, course request ID for courses that are not in the catalog, etc.)

When you select the subject and enter a course number, the DSV will check it against the Course Catalog. If the course is active, it will display the title. If the course is not in the catalog, it will display “Course Not in Catalog.” If the course does not exist (or is not active in the catalog) you can still add it to your schedule and it will count towards your validation. Please only add courses that are not in the catalog if the approval process for the course has already begun. Include the request ID from the course request system in the notes section of the class.

Section Numbers
There are several guidelines in place for assigning section numbers to ensure consistency across departments. The main purpose of the numbering scheme is to designate different components of multi-component courses. Please follow the rules below when creating section numbers:

Single Component Class (Seminar, Lecture, Lab, or Discussion): 2 digits, no suffix

• 01, 02, 03, etc.

Multiple Component Class (Lecture with Lab or Discussion or both):

• Primary Component “Parent Section” (typically Lecture): 3 digits, has a leading zero, no suffix
  o 001, 002, 003, etc.
• Secondary Component: 2 digits, with suffix (L or D)
  o Lab: 01L, 02L, 03L, etc.
  o Discussion: 01D, 02D, 03D, etc.

Crosslisted Class: When possible, give crosslists the same section number. Example: CHINESE 101.01 should be crosslisted with AMES 101.01 (not AMES 101.05).

• If courses are hard crosslisted in the catalog, they should have the same section numbers
• If you are crosslisting special topics courses, contact the crosslisting department(s) to make sure you use a section number that is not already being used by the department(s)

Maximum Enrollment
The only restriction on this section is if the class is an undergraduate seminar. If so, the class cannot have more than 18 seats.

Credits
If a class is set up as variable credit, you will indicate if it should remain a variable credit course or specify the number of credits.

Once you have added all the information on this panel, click the Save and Continue button to assign a meeting pattern and room.
Time/Location Tab

On the **Time/Location** panel, you will see links to **add meeting time** and **add room characteristic**. All classes are required to have a meeting time with the exception of independent studies.

**Meeting Time**

When you click **add meeting time** three drop down boxes will be displayed: days, start-end time, and location. You must choose the day first before selecting a time. Once you select a time, a link for adding a custom end time will appear, which displays a drop down box for selecting an end time.

The start-end drop down displays standard meeting pattern times, which can also be found on our website: [http://registrar.duke.edu/courses-classrooms/class-meeting-periods](http://registrar.duke.edu/courses-classrooms/class-meeting-periods). All classes, regardless of length, must begin at a University approved start time.

The table below shows the standard meeting patterns and all approved start times. All classes meeting in 50-minute sessions must start at the times in the left column and those in 75-minute sessions must start at the times in the right column. Classes not meeting for either 75-minute or 50-minute sessions (e.g., a one day per week, 150-minute class) may start at any one of the start times listed below.

<table>
<thead>
<tr>
<th>Period</th>
<th>50 Minute (MWF)</th>
<th>Period</th>
<th>75 Minute (TTH, MW, WF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>8:45-9:35 a.m.</td>
<td>1</td>
<td>8:30-9:45 a.m.</td>
</tr>
<tr>
<td>2</td>
<td>10:20-11:10 a.m.</td>
<td>2</td>
<td>10:05-11:20 a.m.</td>
</tr>
<tr>
<td>3</td>
<td>12:00-12:50 p.m.</td>
<td>3</td>
<td>11:45 a.m.-1:00 p.m.</td>
</tr>
<tr>
<td>4</td>
<td>1:40-2:30 p.m.</td>
<td>4</td>
<td>1:25-2:40 p.m.</td>
</tr>
<tr>
<td>5</td>
<td>3:20-4:10 p.m.</td>
<td>5</td>
<td>3:05-4:20 p.m.</td>
</tr>
<tr>
<td>6</td>
<td>4:55-5:45 p.m.</td>
<td>6</td>
<td>4:40-5:55 p.m.</td>
</tr>
<tr>
<td>7</td>
<td>6:30-7:20 p.m.</td>
<td>7</td>
<td>6:15-7:30 p.m.</td>
</tr>
<tr>
<td>8</td>
<td>7:30-... p.m.</td>
<td>8</td>
<td>7:30-... p.m.</td>
</tr>
</tbody>
</table>

**Meeting Location**

If your department owns classrooms, they will appear in the location dropdown box. Please note that the DSV does not check for room scheduling conflicts, so it will allow you to double-book a room. However, STORM will not allow two classes to be scheduled in the same room at the same time, so if the room is attached to two classes with overlapping meeting patterns, one class will not be assigned a room.

Once you have finished entering the meeting time, click the **save meeting time** button. Your meeting time will then appear above the **add meeting time** link and you will have the option of entering additional meeting times.

Revised 11.22.2016
**Room Characteristics**

If you do not want to assign an owned classroom but have certain characteristics that are required for the room, add these under room characteristics. You can add up to three room characteristics.

Room Characteristics will help us assign the correct room for the class. When adding room characteristics, please note that the system will check for rooms that meet ALL of the characteristics. If you enter multiple characteristics and there are no rooms that simultaneously match all of them, no room will be assigned. For example, if you enter Room Characteristic: East Campus and Room Characteristic: West Campus, no room will be assigned.

To choose room characteristics, click **add room characteristic** and choose the desired characteristic from drop-down box, then click **save**. When you have added three characteristics, the **add room characteristics** link will disappear.

Once you have finished adding time and location, click **continue** at the bottom of the page. Please note that the **continue** button does not save work on the page. However, if you click **continue** without having saved the meeting time, the DSV will prompt you to go back and save your work or continue and lose your changes.

**Crosslisting/Pairing**

The process for crosslisting and pairing is the same. A crosslist is the same class being offered under multiple subject codes, while a pairing is two separate classes that meet in the same room at the same time and are taught by the same instructor (the work may be different depending on which class the student is enrolled in). Classes are typically paired when an undergraduate and graduate version are taught together.

If a course has hardwired crosslists at the catalog level, the subject codes and catalog numbers will appear in this panel along with the total number of seats in the class. You will be required to enter the section number for each crosslist.

If the course does not have a hardwired crosslists, but you would like to add one, click **add crosslist course**. Before adding any crosslists that are not owned by your department, check with the owning department to obtain a section number. For help assigning section numbers, please see the paragraph about Section Numbers on page 8.

If another department crosslists with one of your classes, it will not appear on your schedule or affect the validation of your schedule. It will, however, appear beneath your schedule in the DSV under “Non-Owned Cross Listed Courses.” Please review classes that are listed here to ensure that the crosslists are accurate.
Component Courses

The last panel required for adding a new class is the Component Courses tab. If the class you are adding has a lab or discussion, you will be required to schedule at least one section for each component in the catalog. Required components will already be listed. You can add as many sections as you want as long as there is at least one section for each component. To add a lab/discussion section, click on the appropriate add link to go to the Main Details page for the secondary component section.

The procedure for adding secondary components is the same as for adding primary components. Your will see the same four panels and follow the same steps to add each component. For help assigning section numbers to secondary components, please see the paragraph about Section Numbers on page 8.

Validation

As you add classes to your schedule, the DSV will continue to check your changes against the scheduling policy and will show you if your schedule (as is) is VALID or INVALID. There are several reasons that the schedule could be invalid. Click on view details to see why your schedule is INVALID.

Validation Rules:

- All courses eligible for validation and their related components must have at least one meeting time.
- Departments may schedule UP TO 50% of all classes below the 700 level during periods 2-4 (“prime time”).
- AT LEAST 40% of all departmental course offerings below the 700 level must meet in some combination of three or more days per week or, for two days per week, in the MW, WF, or MF pattern.
- MW count must equal WF count.
- Departments may schedule UP TO 50% of their classes below the 700 level in the TUTH meeting pattern.
- All courses and their related components with crosslists must specify class section and number of seats.
- All crosslisted courses with components must crosslist each component.
- All courses must possess required components.
To view the details of each point of validation, click **Toggle Details**.

Departments that wish to appeal any aspect of their course validation may do so in writing to the chair of the University Schedule Committee, Frank Blalark, via email (frank.blalark@duke.edu) or by phone (919-684-2813).

**Wild Card**

Each department can use one "wild card" when scheduling for a particular semester. This allows you to be out of validation by one class under one of the validation criteria. Policies that fail but are eligible for wild card use are noted in the validation details. The wild card is applied automatically.

**Mark Eligible**

On the right side of the page under validation status, click **mark eligible** to see which classes are being counted toward validation. A green or red icon will appear next to each class indicating if that class is going to be checked against the course scheduling policy.
Submit Schedule to Registrar

When your schedule is complete and VALID, click **send to registrar** to submit it for processing. During the first round of scheduling for a term, all schedules are processed within the same batch, as long as the schedule is submitted by the first deadline. After the first round, schedules are processed in the order in which they are received and are entered manually by Registrar Office staff. Schedules cannot be released back to the department until they are processed or changes will be lost.

**Status**

The status of your schedule is visible at the top of your schedule. There are three statuses:

- **schedule released for department use**: The schedule was returned to the department and can now be edited – look for the following icons that indicate notes from the Registrar or items that may have not been processed:
- **changes in progress; schedule not yet submitted**: There have been changes made to the schedule that have not yet been submitted to the registrar’s office. The changes will not be reflected in ACES until the schedule is submitted and processed.
- **changes submitted; schedule locked**: The schedule has been submitted to the Registrar’s Office and is waiting to be processed. During this time, no changes can be made to the schedule.

Under Status on the right side of the page, you will see the date/time and name of the person who submitted the schedule, and also the date/time and name of the person who released it back.

Once your schedule is submitted, the **send to registrar** link will disappear and the status will show where you are in the queue to be processed.

**Other DSV features**

**Create Multiple Schedules**

You can create multiple schedules if you want to try different versions before submitting one to the Registrar’s Office. You must set one schedule as the primary schedule to submit. After the schedule is submitted, you cannot set a different schedule as the primary schedule.
Communication Tools
There are several tools in the DSV that help clarify changes and facilitate communication between academic departments and the Registrar’s Office.

Notes
The Registrar’s Office has the ability to send notes back to the department after processing requests. The notes will be attached to specific class sections as needed. The notes may be informational or may request further actions that are required of the academic department for the class to be scheduled. Your class section may have a note attached, whether the course was processed or not. If a note is attached this icon will appear: 📝

Dot Color Scheme
Dots will appear in varying colors beside each class section to indicate the status of the class section. No dot means the class section was processed in a previous submission and no changes were made to the class in the most recent submission.

👉 Yellow – You have added and/or modified a class section but your schedule has not been submitted to the Registrar’s Office.

👉 Gray – Your schedule has been submitted to the Registrar’s Office and your schedule is locked.

👉 Green – Your schedule has been released by the Registrar’s Office and the class section was processed by the Registrar’s Office and successfully added to the schedule. (Be sure to check for a possible note from the Registrar’s Office).

👉 Red – Your schedule has been released by the Registrar’s Office and the class section was not processed or added to the schedule and requires further action. All classes that are not processed will be returned with a note that explains why the Registrar’s Office was unable to process your request.

👉 Black – You have deleted a course.