
Summer Term Planner User's Guide

Instructions for using
the Summer Term
Planner application

CAS Dean's Office 11/13/12

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Accessing the Tool

The Summer Term Planner is the tool CAS departments use to submit Summer term scheduling, instructor, and salary information to the Dean's Office.

The deadline for entering summer term schedule and budget proposals in the Summer Term Planner is Friday, December 14, 2012 at 5:00 PM, at which point access will be closed.

You will access the Summer Term Planner via CASweb. In the top navigation, go to Summer → Summer Term Planner.



Figure 1. Accessing the Planner

You'll see the UO Web Sign On Service page.

Username: DuckID (first part of your UO email address)

Password: DuckID password

Home Page

The Home page verifies your departmental affiliation. If you do not have access to the correct department(s), please contact Anna Puhn (6-4441; apuhn@uoregon.edu).

If you are affiliated with more than one department, use the drop-down menu to select the department you would like to work on. This will be the active department until you return to the Home page and select a different department.

To begin, click the Update Course Offerings tab at the top of the page.

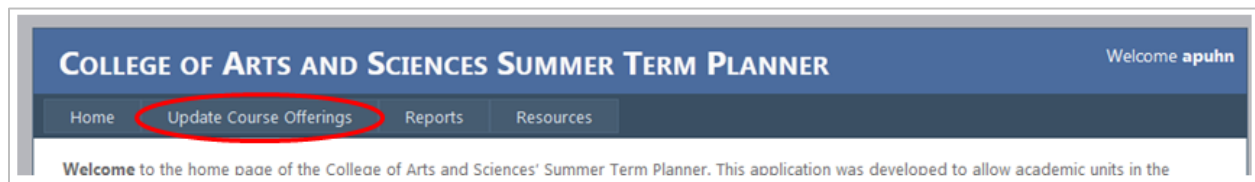


Figure 2. Update Course Offerings tab location

Update Course Offerings

This section is populated with last summer's course offerings. The only updates from the previous year are the dates. If you want to repeat these offerings with no changes whatsoever, you may submit this course information as it is. Typically, however, departments do not repeat course offerings exactly. Instructors change, meeting times change, compensation changes, and courses are added or removed. This section is where you will indicate courses and sections your department will offer in Summer 2013, instructors of these courses, and instructor salaries.

Course Offerings

The "Course Offerings" tab displays a list of all courses offered by your unit during the previous summer. The courses are listed ten per page; you may have to scroll through a number of screens using the page numbers at the bottom of the page. For each course listed, you have three options:

1. Keep the course exactly the same (no changes to instructor, salary, dates, times, etc.);
2. Cancel the course if your department will not offer it in the next Summer term; or
3. Edit the course details.

You will also add any courses your department did not offer last year.

COLLEGE OF ARTS AND SCIENCES SUMMER TERM PLANNER						Welcome apuhn! [L]
Home	Update Class List	Reports	Unit Budget	Catalog	About	
SUMMER TERM 2011 - CURRICULUM PROPOSAL						
Course Offerings	General Information	Meeting Times	Instructors	Class Budget		
Action	Course Is Cancelled	CRN	Credit Subj	Subj	Course Number	Title
Reinstate Course	True	41430	CLAS	CLAS	399	Sp St Film Anc World
Reinstate Course	True	41429	CLAS	CLAS	399	Sp St Sports Anc World
Cancel Course Edit Course	False	41431	CLAS	CLAS	403	Thesis
Cancel Course Edit Course	False	41432	CLAS	CLAS	405	Reading
Cancel Course Edit Course	False	41433	CLAS	CLAS	503	Thesis
Reinstate Course	True	41434	CLAS	CLAS	602	Superv College Teach
Cancel Course Edit Course	False	41435	CLAS	CLAS	605	Reading
Cancel Course Edit Course	False	41991	CLAS	LAT	101	Basic Latin
Cancel Course Edit Course	False	41992	CLAS	LAT	102	Basic Latin
Cancel Course Edit Course	False	41993	CLAS	LAT	103	Basic Latin
Insert Cancel			Choose	Choose		

Figure 3. Course Offerings

Canceling a Course

To cancel a course your department will not offer, click the "Cancel Course" link in the left column of that course's row. The course details will appear in red. If you need to reinstate the course, click the "Reinstate Course" link.

Editing a Course

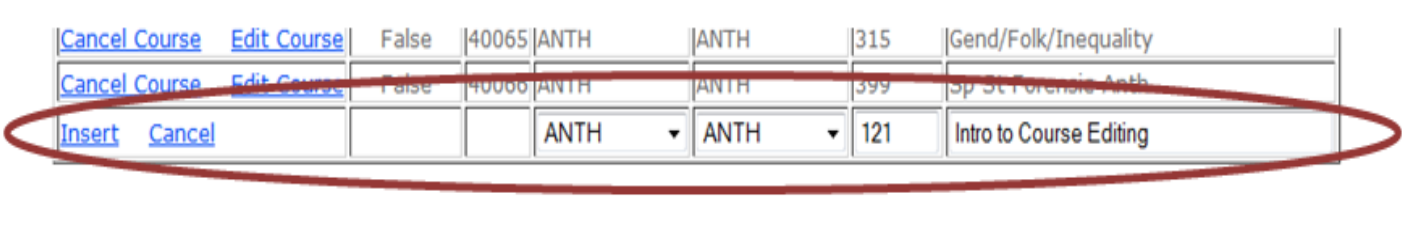
To make changes to a course your department will offer again in the next summer term, click the Edit Course link in the left column. You will make your changes on the General Information, Meeting Times, Instructors, and Class Budget tabs. The fields on these tabs correspond to the fields on the CMF and in the BANNER forms you use to process academic year course scheduling. (See instructions for each tab in the next section.)

As you edit each course, it is important to move through each tab in sequence, clicking the various “Update” or “Insert” buttons as necessary to save your work. When you are finished editing one course, click the Course Offerings tab to select another course to edit.

Adding a Course

To add a course your department did not offer last summer, use the bottom row of the courses table.

1. Enter values in the “Credit Subj”, “Subj”, “Course Number”, and “Title” fields.
2. Click “Insert” in the Action column. **The CRN the tool generates for new courses is NOT the actual CRN**; it is a placeholder. The actual CRN will be assigned by the Registrar’s Office. Real CRNs begin with the number 4; placeholder CRNs begin with the number 9.
3. You will be taken to the General Information tab. Click the blue “Edit” or “New” links to enter your information. You have to scroll down to see the first “Edit” link.



Cancel Course Edit Course	False	40065	ANTH	ANTH	315	Gend/Folk/Inequality
Cancel Course Edit Course	False	40066	ANTH	ANTH	399	Sp St Forensic Anth
Insert Cancel			ANTH	ANTH	121	Intro to Course Editing

Figure 4. Adding a new course

General Information tab

The screenshot shows the 'COLLEGE OF ARTS AND SCIENCES SUMMER TERM PLANNER' interface. At the top, there are navigation tabs: Home, Update Course Offerings, Reports, and Resources. Below these, a sub-header reads 'SUMMER TERM 2012 - CURRICULUM PROPOSAL'. The main content area has several sub-tabs: Course Offerings, General Information (which is highlighted with a green border), Meeting Times, Instructors, and Class Budget. Under the 'General Information' tab, the course is identified as 'BI 130 (CRN 40254) Intro to Ecology 4 credits'. Below this, the 'Class Information' section contains a table with the following fields and values:

CRN	40254
Credit Subject	BI
Subject	BI
Course Number	130
Course Title	Intro to Ecology
Minimum Credits*	4
Maximum Credits	0
Estimated Maximum Enrollment*	0
Estimated Projected Enrollment*	0
Actual Enrollment Previous Summer	0
Cross List Code	
Section Linking	10
Campus Code	UO main campus
Section Status	Active

Figure 5. General Information tab, editing the Class Information section

Editing General Information

1. You will have to scroll down to see the first Edit link, which will activate the Class Information fields.
2. Enter information in the relevant Class Information fields and click “Update” to save your work.
 - If you get the message “Object reference not set to an instance of an object,” make sure you have entered information in all of the relevant fields.

For definitions and options for some of these fields, please see the Banner Resources section of this page:

http://registrar.uoregon.edu/faculty_staff/academic_scheduling#Academic_Scheduling_Policies

After you have completed the General Information fields, you can move on to the Meeting Times tab.

Meeting Times tab

On the Meeting Times tab, you will enter or verify the meeting times of the course and verify that the proposed meeting times fulfill the student engagement minutes the course requires (see Appendix A of the Technical Guide to Summer Term). The application calculates the expected minutes based on UO legislation and the credit hours you entered on the General Information tab.

SUMMER TERM 2012 - CURRICULUM PROPOSAL

Course Offerings General Information **Meeting Times** Instructors Class Budget

ANTH 121 (CRN 90594) Intro to Course Editing 2 4 credits

M	T	W	R	F	S	U	Start Time	End Time	Start Date	End Date	Building	Room
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			6/25/2012	9/7/2012	None	

[Insert](#) [Cancel](#)

Proposed contact minutes must be greater than or equal to the required contact minutes

	Contact Minutes	Out-of-Class Minutes	Engagement Minutes
Expected	2,000	4,000	6,000
Proposed	0	0	0

Justification when engagement minutes are fewer than required

Educational Activity	Minutes of Student Engagement	Explanation (optional)

Figure 6. Entering meeting times

1. If this is a course that was offered last year, and you do not need to make any changes to the meeting days or times, you may proceed to the Instructors tab.
2. If the course has no meeting times entered, click the blue “New” link under “This course has no meeting times.”
3. If the course has existing meeting times, you may “Edit” or “Delete” them.
4. To enter or change meeting times and room requests:
 - Use the checkboxes to select days of the week;
 - Enter start and end times as four-digit numbers using the 24-hour clock. For example, 0800, 1430, 1650, etc.;
 - Select a part of term from the drop-down menu.
 - **Courses meeting outside these standard parts of term must be approved by Ian McNeely (imcneely@uoregon.edu) by the December 14th deadline.** For these courses, select “Other” and enter the course dates. See the Course Scheduling section of the Technical Guide for more information.
 - The building and room number represent the department’s preference, but due to space constraints, Academic Scheduling may not be able to honor all room requests.

5. Click “Insert” to save your meeting times and room request.
6. To add additional meeting times, click “New.” For example, if a class is scheduled to meet Monday through Friday 8:00 AM to noon, and you would like to add a meeting every Monday from 2 to 2:50, click “New” to enter the second Monday meeting. Then click “Insert” to save your changes.

If the contact hours you entered are lower than expected for an undergraduate course, the application provides you with a form to enter a statement of justification. The justification may refer to the approved practice during the academic year.

After you have entered and saved all data on the Meeting Times tab, you may proceed to the Instructors tab.

Instructors Tab

On the Instructors tab, you will update or change personnel and payroll information for the instructor of the course listed at the top of the page. You must complete the Meeting Times tab before the application will allow you to enter information here.

Note that you cannot add instructors for individualized study courses. You'll do that in Banner, for each individual student who registers.

SUMMER TERM 2013 - CURRICULUM PROPOSAL	
Course Offerings General Information Meeting Times Instructors	
COLT 212 (CRN 40697) Comparat World Cinema 4 credits	
Banner ID*	950123456
Name*	Duck, Daisy
Student Type (GTF Only)*	Master's
Instructor Type*	GT2
Percent Responsibility*	100
Percent Session*	100
Primary Instructor*	False
Institutional Base*	\$27711
Proposed Base (only if different from institutional base)	\$0
GTF FTE*	.37
Proposed Pay*	\$3418
Exclude From Max Pay Exception Report	
Estimated Unclassified OPE	\$0
Estimated GTF OPE	\$165
Estimated Other Expense*	\$0
Contract Dates	7/16/2013 to 8/15/2013
CAS Comments	

Figure 7. Instructors tab

1. For a new course with no instructor assigned, click “New.”
2. For an existing course with an assigned instructor, scroll down until you can see the “Edit,” “Delete,” and “New” links at the bottom of the block of fields.
 - If the instructor will be the same person, click “Edit” to update and verify the information.
 - If the listed instructor will not be teaching this course, click “Delete” to remove this instructor from the course.
 - To add a new instructor, click “Add.” If the course has more than one instructor, you may navigate among them using the numbers below the blue links.

Estimated Other Expense*	
Contract Dates	
CAS Comments	
Department Comments	
Edit Delete New	
1 2	

Figure 8. Links to edit, delete, and add instructors. Scroll down to see these.

3. If you **do not yet know** who will teach the course, or if the instructor is **new to campus**, enter nine zeros for the Banner ID and click “Fetch Instructor.”
 - The Name field will populate with “Staff.” Instructor type will default to “TBD,” but you may change this if you know what the type will be.
4. If you **do know** who will teach the course, enter the employee’s UO ID and click “Fetch Instructor.”
 - The Name, Instructor Type, and Institutional Base will populate.
5. If the instructor will be a GTF, enter the level and the FTE. The Planner will calculate the proposed pay and the OPE.
6. Fill in the rest of the instructor information. The table on the next page contains information on the key fields. When you have finished entering one instructor’s information, click “Insert.”
7. After you have entered all the data on this tab, you may return to the Course Offerings tab to begin entering data for another course.

Instructor Fields

Field	Definition or Tip
Banner ID	Employee's 95x number. If the instructor is TBD or does not have a 95x number yet, enter 000000000.
Name	Will populate from the Banner ID. If you enter zeros for an instructor TBD, this will display as "Staff."
Instructor type	Will populate from the Banner ID. For an instructor TBD, enter the type if the department has decided.
Institutional base	Will populate from the Banner ID or from the GTF level. If the institutional base exists, do not enter a proposed base.
Proposed base	Only use this field if Institutional Base is not populated.
Proposed pay	Proposed pay for this instructor for teaching this course. This will be calculated for GTFs. For unclassified employees, the application will display a message if the pay you enter here is more than is allowed. Simply dividing the academic year base by 9 to figure the maximum monthly compensation may result in a higher figure than the employee is allowed, due to the number of contract and working days.
Estimated OPE	Will populate when instructor and salary are entered and saved. Calculations based on current CAS OPE rates.
Estimated other expenses	Use for expenses related to the course that should be included in the course budget estimates. For example, graders/lab assistants, travel, lodging, if applicable. Enter "0" if the course does not have any expenses outside of instructor salary.
Contract dates	If the course is scheduled in one of the standards parts of term, contract dates will populate based on the part of term. If you selected "Other" for part of term, the Dean's Office will enter contract dates for you.
Department comments	If there is anything you would like the Dean's Office to know about the pay for this instructor, please enter it here. If you are proposing a salary that is above the employee's maximum pay for the contract period, this is where you will enter the justification.

Planner Troubleshooting

Problem	Possible Solution
I can't enter information in the fields!	Scroll down and click the "Edit" link. Sometimes this is below the visible frame of the page, most notably in the Class Information block and on the Instructors tab. When you are finished entering information in the block, click "Update."
Error message: "Object reference not set to an instance of an object."	This usually means you have not entered information in all the required fields. For example, if you are entering a course meeting time, make sure you have selected day(s) of the week, entered four-digit 24-hour start and end times, and selected a part of term.
Error message on the Instructor tab: "Enter a valid number for estimated other expense."	Make sure you have entered information in all the fields marked with an asterisk. (You may enter "0" for estimated other expense.) If this doesn't work, you may have to navigate out of the Planner and come back in a few minutes. This is a known issue that sometimes occurs on this page.
The application did not save information I entered.	Make sure you click "Insert" or "Update" before you leave the block of fields.
I don't have access to my department.	Please contact Anna Puhn in the Dean's Office (6-4441 or apuhn@uoregon.edu).
When I enter a new instructor for a course, I can't see the information for the new instructor, only for an existing person.	After you insert a new instructor, the application takes you back to the instructor in the "1" position. Scroll to the bottom of the block and navigate among the instructors using the numbers under the "Edit," "Delete," and "New" links.
I am trying to navigate to a different tab, but the application keeps bouncing back to the tab I am trying to leave.	Scroll down. There is probably a message that says "Please finish what you are doing before proceeding to the ____ tab." Click "Update" or "Cancel" (depending on whether you would like to save your recent work), then try again to navigate to the other tab.

Support Contacts

If you need help with the Summer Term Planner, please contact Anna Puhn (apuhn@uoregon.edu; 6-4441) or Sherri Nelson (sherrin@uoregon.edu; 6-8196).