

Office of Class Management

PC-138

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PantherSoft Training Guide for Schedulers



FIU FLORIDA INTERNATIONAL UNIVERSITY

Office of Class Management

Search OCM

MENU

- Home
- 25LIVE & Classrooms
- Events in OCM Classrooms
- Forms & Guidelines
- Training Materials
- Additional Resources
- Contact Us

PantherSoft Campus Solutions LOGIN

FIU FLORIDA INTERNATIONAL UNIVERSITY
OCM HELPDESK LOGIN

FIU RESERVATION SYSTEM
25LIVE LOGIN

UPCOMING OCM TRAININGS

Scheduler Meeting
Monday, February 3, 2014
10:00 AM in AHC3-205 (MMC) & AC2-210 (BBAY)

PantherSoft Schedule & OCM Help Desk Training
February 5 & 19, 2014
March 5 & 19, 2014
April 2, 2014
PC 449
10:00 AM - 12:00 PM

25Live Reservations Training
February 12 & 26, 2014
March 12, 2014
April 9, 2014
PC 449
10:00 AM - 12:00 PM

Refresh skills at anytime by reviewing manual [here](#).

UPCOMING OCM DEADLINES

Date	Process
2/7/2014	Resolve Summer '14 Homeless
2/10/2014	OCM Ticket Submission Summer '14
2/17/2014	Spring 2015 Key-In Opens
2/21/2014	Resolve Fall '14 Homeless
2/24/2014	OCM Ticket Submission Fall '14
3/14/2014	Summer & Fall '14 Available to Students
4/11/2014	Spring 2015 Key-In Closes

Office of Class Management
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Contents

Introduction:	3
Step 1: Run Query	3
Step 2: Where to Begin	4
Maintain Schedule of Classes	4
Starting the Keying-In Process	6
Adding, Modifying, and/or Canceling a Class	6
Adding a New Section to a Class	7
Adding a New Course	7
Canceling a Section	9
Checking the Schedule for Errors	10
Combined Sections	11
Modifying a combined course	12
Edit, Cancel or Delete a combined section- Stop!	13

Introduction:

Schedulers will have access to edit the schedule inside PantherSoft during specific keying-in time periods throughout the year. After the deadline passes, schedulers will have to submit any changes to the schedule via OCM Helpdesk tickets- for more on OCM Helpdesk (separate training).

The instructions below are for those specific keying-in periods, in which Schedulers can edit their departmental courses for a particular term.

Before you begin, you need to run a query to identify which classes rolled over from the previous “like term”. Use the following query: **FIU_OCM_SCHEDULE_CHAR**

1. **Log onto PantherSoft** = <https://psprod.fiu.edu/psp/students/?cmd=login>
2. **Sign in** = User ID and Password are required.

- [Main Menu](#)>[Query Viewer](#)

Step 1: Run Query

Look over the new schedule that you receive from your chairperson – every class on that schedule must specify:

- Campus that the class will be offered
- Instructor (s)
- Meeting Start Time and Meeting End Time
- Days that the class will meet
- Enrollment capacity of the class
- Requested room cap
- Does the class need specific technology equipment?
- Does the class need a Special Room Requests? Form provided by OCM; must be submitted via OCM Helpdesk.
- Does the class need Notes so the students can read when registering?
- Will the class be combined with another class?

Do not begin the keying-in process without having this information above on the schedule that you receive from your supervisor.

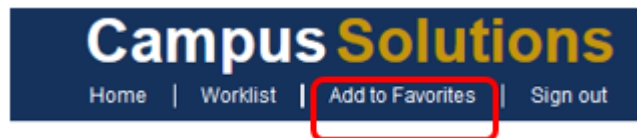
Step 2: Where to Begin

- Compare the schedule query to the schedule you received from your supervisor.
- Make notes as to which sections need to be canceled from the system, particularly if they will not be offered again.
- Make notes as to which sections need to be added and which ones need to be modified.
- Start with the Basic Data tab, then save
- Meetings tab, then save
- Enrollment Cntrl tab, then save

Finish all the details of one class before you start working on the next class.

Maintain Schedule of Classes

Navigate to: • [Main Menu](#)>[Curriculum Management](#)>[Schedule of Classes](#)>[Maintain Schedule of Classes](#)



Tip: Add to your favorites

In the **Basic Data Tab**: you can **add or modify**

- Section number
- Campus
- Location code
- Check the Student Specific Permission box
- Check the Schedule Print box
- Instruction Mode

In the **Meetings Tab**: you can

- Assign meeting times
- Assign meeting days
- Add second meeting patterns (if your class requires it)
- Assign Department room (Facility ID Field)
- Add second meeting patterns (if your class requires it)
- Assign Instructor (or multiple Instructor if your class requires)
- Assign Instructor Role
- Assign Instructor Access
- Assign Room Characterizes classroom requirements (like Computer Lab, Back to Back Courses for Inst., etc.)

In the **Enrollment Cntrl** Tab: you can

- Set Class Status
- Edit Add/Drop Consent Status
- Assign Requested Room Capacity
- Assign Enrollment Capacity

In the **Note Tab**: you can

- Add/Modify any notes

Starting the Keying-In Process

Adding, Modifying, and/or Canceling a Class

Navigate to: **Main Menu>Curriculum Management>Schedule of Classes>Maintain Schedule of Classes**

Tabs you will use: Basic Data Tab, Meetings Tab, and Enrollment Cntrl Tab

The screenshot shows the 'Basic Data' tab of the 'Maintain Schedule of Classes' screen. The interface includes a breadcrumb trail at the top: 'Favorites | Main Menu > Curriculum Management > Schedule of Classes > Schedule New'. Below the breadcrumb are several tabs: 'Basic Data', 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', 'Exam', and 'LMS Data'. The 'Basic Data' tab is highlighted with a red box. The main form contains various fields for course and class information. Callouts provide the following details:

- Basic Data tab**: Points to the 'Basic Data' tab.
- Session: Regular Academic Session** and **Class Section: U01**: Points to the 'Session' and 'Class Section' dropdown menus.
- Component: C for Class Lecture**: Points to the 'Component' dropdown menu.
- Campus: click icon, select for the list "UPARK"** and **Location "1000 = MMC"**: Points to the 'Campus' and 'Location' dropdown menus.
- Instructor Mode: Select for the list**: Points to the 'Instruction Mode' dropdown menu.

Other visible fields include: Course ID: 025403, Academic Institution: Florida International Univ, Term: Spring Term 2016, Subject Area: NUR, Catalog Nbr: 3535, Course Offering Nbr, Undergrad, *Start/End Date: 01/11/2016 to 04/30/2016, Event ID, *Associated Class, Units: 3.00, *Campus: UPARK, *Location: 1000, Modesto A. Maidique Campus, *Academic Organization: NURSNG-2, Nursing/CNHS, *Academic Group: CNHS, College of Nursing & Hlth Sci, *Holiday Schedule: ACAD, Academic Holiday Cal (U&Grad), *Instruction Mode: P, In Person, Primary Instr Section: U01, and a 'Class Attributes' table at the bottom.

*Course Attribute	*Course Attribute Value
CORE	Cat-Core-Curr-Ind (FICAT) N Does not meet Core Requirement
GNED	Cat-General-Ed-Ind (FICAT) N Does not meet General Educ Req

Adding a New Section to a Class

Navigate to: **Main Menu>Curriculum Management>Schedule of Classes>Maintain Schedule of Classes**

Tabs you will use: Basic Data Tab, Meetings Tab, and Enrollment Cntrl Tab

The screenshot shows the 'Schedule New Course' interface. The breadcrumb trail is 'Favorites > Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course'. The 'Basic Data' tab is selected and highlighted with a red box. Other tabs include 'Meetings', 'Enrollment Cntrl', 'Reserve Cap', 'Notes', 'Exam', 'LMS Data', 'Textbook', and 'GL Interface'. The 'Meetings' and 'Enrollment Cntrl' tabs are also highlighted with red boxes. The course details are: Course ID: 025403, Academic Institution: Florida International Univ, Term: Spring Term 2016, Subject Area: NUR, Catalog Nbr: 3535, Course Offering Nbr: 1, Undergrad Nursing, Generic Undergraduate Psychosocial Nurs. An 'Auto Create Component' button is visible. The 'Class Sections' table shows one entry: *Session: 1, Regular Academic Session, Class Nbr: 19689, *Start/End Date: 01/11/2016 to 04/30/2016. A plus sign in the table is highlighted with a red box and a callout box containing the text 'Click on the plus sign.'

Adding a New Course

To add a new class that was not offered in a previous semester, then

Navigate to: **Main Menu>Curriculum Management>Schedule of Classes>Schedule New Class**

Tabs you will use: Basic Data Tab, Meetings Tab, and Enrollment Cntrl Tab

The screenshot shows the 'Schedule New Course' search criteria form. The breadcrumb trail is 'Favorites > Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course'. The search criteria are: Term: 1161, Subject Area: NUR, Catalog Nbr: 3535. A callout box points to the search criteria with the text 'Select the Term: 1161, Subject Area: NUR, Catalog Nbr: 3535'. The 'Search' button is highlighted with a red box. The search criteria form includes fields for Academic Institution, Term, Subject Area, Catalog Nbr, Academic Career, Campus, Description, Course ID, and Course Offering Nbr. There are also checkboxes for 'Case Sensitive' and a 'Limit the number of results to (up to 300): 300' field. The 'Search' button is highlighted with a red box.

[Favorites](#) | [Main Menu](#) > [Curriculum Management](#) > [Schedule of Classes](#) > [Schedule New Course](#)

[Basic Data](#) | **[Meetings](#)** | [Enrollment Cntrl](#) | [Reserve Cap](#) | [Notes](#) | [Exam](#) | [LMS Data](#) | [Textbook](#) | [GL Interface](#)

Class Sections Find | View All | First 2 of 3 | Last

Course ID: 025403 **Course Offering Nbr:** 1
Academic Institution: Florida International Univ
Term: Spring Term 2016 Undergrad
Subject Area: NUR Nursing, Generic Undergrad
Catalog Nbr: 3535 Psychosocial Nurs

Session: 1 Regular Academic Session Class
Class Section: **Component:** Class Lecture Even
Associated Class: 1

Meeting Pattern Find | View All | First 1 of 1 | Last

Facility ID	Capacity	Pat	Mtg Start	Mtg End	M	T	W	F	S	S	*Start/End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	8:00AM	8:50AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01/11/2016

Topic ID: **Free Format Topic:**
 [Print Topic On Transcript](#) [Contact Hours](#)

Instructors For Meeting Pattern Personalize | Find | View All | 1 of 1 | Last

Assignment	Workload	*ID	Name	*Instructor Role	Print	Access	Contact
		1700001	.,TBA	Prim Ins	<input checked="" type="checkbox"/>	Submit	<input type="text"/>

Academ Shift Personalize | Find | 1 of 1 | Last

[Basic Data](#) | [Enrollment Cntrl](#) | [Reserve Cap](#) | [Notes](#) | [Exam](#) | [LMS Data](#) | [Textbook](#) | [GL Interface](#)

Meetings tab
Mtg Start, Enter e.g. "08:00am" (SMP)
Mtg End e.g. "08:50am".
 Select M, W, F

At least one Instructor needs to be set as "Submit" to submit grades.

Click the "ID" field. Enter the "Instructor PantherSoft ID".
 Enter **eg: 1700001** if you know who will be teaching, but has not been processed.
 Enter **eg: 1000000** if you don't know who will be teaching.

All Course need a "Primary Instructor"

Check the box so students can see Instructor on Course Catalog.

Canceling a Section

To delete section(s) that will not be offered in the semester you are working in, then follow the steps below.

Navigate to: **Main Menu>Curriculum Management>Schedule of Classes>Maintain Schedule of Classes**

Tabs you will use: Basic Data Tab

1. Click the minus sign in the Basic Data Tab to delete the section.

The screenshot displays the PantherSoft Scheduler interface. The breadcrumb navigation at the top reads: Favorites > Main Menu > Curriculum Management > Schedule of Classes > Schedule New Course. Below this, a series of tabs are visible: Basic Data (selected), Meetings, Enrollment Cntrl, Reserve Cap, Notes, Exam, LMS Data, Textbook, and GL Interface. The main content area is divided into two sections: 'Class Sections' and 'Meeting Pattern'. The 'Class Sections' section shows details for Course ID 025403, Academic Institution Florida International Univ, Term Spring Term 2016, Subject Area NUR, and Catalog Nbr 3535. The 'Meeting Pattern' section shows a table with columns for Facility ID, Capacity, Pat, Mtg Start, Mtg End, M, T, W, T, F, S, S, and *Start/End Date. A red callout box with a white background and black border points to a minus sign icon in the 'Meeting Pattern' section, with the text 'Click on the minus sign.'

Checking the Schedule for Errors

Once you are done updating the schedule in PantherSoft, then you need to check the schedule for errors.

When you are finished keying-in the new schedule, run the query again and compare the results with the schedule that you received from your supervisor.

Make sure you deleted all of the classes that rolled over that your department will not be offering in that semester.

Query: **FIU_OCM_SCHEDULE_CHAR**

1. **Section numbers** must match **Campus**
2. **AM/PM mistakes**
3. Common mistakes: 10:00**am**-10:50**pm** or 11:00**pm**-1150pm
4. **Offer Nbr Column** on query should always say “1”

-Only SPECIAL section numbers should have a “40” in this column-otherwise tuition rates are affected

5. **Classes with Meeting Days also have Meeting Times** and vice versa
6. **All classes begin at standard starting times** –
7. **No courses should be scheduled during the university free period**
8. Check classes for second meeting patterns that rolled over in the Meetings Tab – delete second meeting patterns, if they are not needed.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Term	Acad Group	Acad Org	Sess	Class Nbr	Subject	Catalog	Section	Descr	Enri Stat	Class Stat	Component	Mode	Cap Enri
1158	CEUC	TEACHLRNG	1	80002	EEC	3204	U01	Issues In Eec	O	A	C	P	30
1158	CBADM	FINANCE	1	80003	FIN	4651	RVC	Lat Am Fin Mkt & Ins	O	A	C	I	50
1158	CASCI	CHEMISTRY	1	80946	CHM	2210L	U09	Org Chem Lab I	C	A	L	P	0

Combined Sections

Combining Sections

Navigate to: **Main Menu>Curriculum Management>Combined Sections>Combined Sections Table**

Tabs you will use: Find an Existing Value

1. Select the **Term** and **Session**, then **Search**

Combined Sections Table

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Academic Institution: = FIU01

Term: = 1161

Session: = Regular Academic Session

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

2. Click on the plus sign to add a row, and a blank row will appear.

Combined Sections Table

Academic Institution: Florida International Univ

Term: Spring Term 2016

Session: Regular Academic Session

*Combined Sections ID	*Description	*Short Description	
8388	PSY4931RVE/RPE	PSY4931RVE	View Combined Sections + -
8389			+ -
8387	CLP4374RVD/RPD	CLP4734RVD	View Combined Sections + -

3. Enter the 2 class numbers you want to combine; it will automatically populate the fields.
4. Once complete, save (**Alt+1**)

Comb Sec ID

Add Class numbers

Total of all caps combined

Academic Institution: FIU01 Florida International Univ
 Term: 1161 Spring Term 2016
 Session: 1 Regular Academic Session
 Combined Sections ID: 8386 PSY4302RVC/RPC
 *Combination Type: Cross Subject

Permanent Combination
 Skip Mtg Pattern & Instr Edit
 Warning: Mtg Pattern & Instr information will not be shared within the combined section.

Room Capacity

Requested Room Capacity: 70 Enrollment Capacity: 70 Total: 0
 Wait List Capacity: Wait List Capacity: 0

Class Nbr	Subject	Catalog Nbr	Section	Status	Req Room Cap	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Acad Group
21182	PSY	4302	RVC	Open	9999	50	0	0	0	CASCI
21288	PSY	4302	RPC	Open	9999	20	0	0	0	CASCI

Modifying a combined course

1. Click on the plus sign/Minus to delete. Enter the class number you want to add. It will automatically populate the fields.

Add class numbers

Academic Institution: FIU01 Florida International Univ
 Term: 1161 Spring Term 2016
 Session: 1 Regular Academic Session
 Combined Sections ID: 8386 PSY4302RVC/RPC
 *Combination Type: Cross Subject

Permanent Combination
 Skip Mtg Pattern & Instr Edit
 Warning: Mtg Pattern & Instr information will not be shared within the combined section.

Room Capacity

Requested Room Capacity: 70 Enrollment Capacity: 70 Total: 0
 Wait List Capacity: Wait List Capacity: 0

*Class Nbr	Subject	Catalog Nbr	Section	Status	Req Room Cap	Enrl Cap	Enrl Tot	Wait Cap	Wait Tot	Acad Group
21182	PSY	4302	RVC	Open	9999	50	0	0	0	CASCI
21288	PSY	4302	RPC	Open	9999	20	0	0	0	CASCI

Edit, Cancel or Delete a combined section- Stop!

When a combined section exists on the combined sections table, **both courses share the meeting pattern**. To delete or cancel 1 of the 2 or 3 classes, you must uncombined the course on the Combined Sections table first.

Navigate to: **Main Menu>Curriculum Management>Combined Sections>Combined Sections Table**

Tabs you will use: Find an Existing Value

1. Select the Term and Session, then Search
2. Find the combined class by clicking on Ctrl + F and searching for the class prefix or Combined Section ID number.
3. Select **View Combined Section** link for the class you are looking to edit.
4. Edit the Requested Room Cap and the Enrollment Cap, according to your new caps on each class. Combined courses meet at the same time, in the same classroom, with the same professor.
5. To make a combined section that meets at different times or on different campuses, click on "Skip Meeting Pattern".

Deleting both Combined Courses

Navigate to: **Main Menu>Curriculum Management>Combined Sections>Combined Sections Table**

Tabs you will use: Find an Existing Value

1. Select the **Term** and **Session**, then **Search**
2. Find the combined class by clicking on Ctrl + F and searching for the class prefix or Combined Section ID number.
3. Select **View Combined Section** link for the classes you are looking to edit.
4. Click on the minus sign.

End