



## *CAMPUS MANAGEMENT TEAM RECOMMENDATION*

**Process:** Event Planning

**Description of Recommendation:**

Campus Management offers much flexibility with regard to the planning of course offerings or “event planning.” The objective of this proposal is to recommend an event planning strategy that best meets UM’s needs.

The CM object types that come into play with event planning are SE’s (event packages) and E’s (events). Phase I work on the academic structure stopped at SM (module) and D (event type) objects. Meeting dates and times, locations, instructors, etc. can be associated with an E object, allowing one to specify particular course offerings, whereas the SE object is timeless. In the majority of cases, there is a one-to-one relationship between SE and E object types; however, SE objects can be used to package together different kinds of events that logically make up a single unit of study, e.g., a course that includes a lecture and a lab component. SE objects also play a part in rolling forward course offerings from a prior term and year to a future term and year.

1. The first question for UM is how to use the SE object. Two choices that seem reasonable are:
  - (a) define one SE per SM for all time
  - (b) define one SE per SM per kind of term (Spring, Fall, First Summer, ...)

This proposal recommends the second choice (b). This recommendation is based on the University’s requirements that section capacities vary from semester to semester and that booking rules vary from semester to semester.

2. The next question for UM is what naming convention to use for SE objects. Twelve characters (alphanumeric) are available for the short name. A BADI can be used to assist in deriving the SE short name. This proposal recommends the following:

That we DO NOT implement the BADI to assist in the naming of the Event Package (SE) and that we adopt the naming convention below. However, it is noted that the BADI could be implemented to populate the SE short name with the word ‘Section’, but the user would still need to enter the section number to complete the SE short name.

The Event Package Short Name will consist of the word 'Section' followed by a number to denote the section number. The Event Package Long Name will consist of the Academic Session (term) followed by the Event Package Short Name followed by the Module Short Name. Some examples are below:

Section 1 – Fall Section 1 for Math 262

Section 38 – Spring Section 38 for Engl 101

This recommendation is being made to best support the Event Planning process while keeping in mind the requirements of booking and Web view of course offerings.

3. In reviewing the capabilities of event planning, it seems appropriate to use the E object to represent exams outside normal class hours that are currently noted by footnotes in the course schedule booklet (i.e. Reserve 4:00-6:00 on Thursdays for Exams). This proposal recommends that this not be a requirement for the Spring 2003 "go live" date; however, it should be explored for future terms.
4. Certain Music courses, e.g., studio trumpet, carry different credit hours depending on the term of offering. This proposal recommends handling this with a variable credit hour range at the SM level and a VSR (rule) to enforce the appropriate value for each kind of term.
5. In Fall 2002, academic departments were given the ability to change section limits while registration was in progress. Comparable functionality needs to be provided within CM.

### **Underlying Opportunities:**

The migration to CM provides an opportunity to review how course offerings are developed and to simplify where possible. The object model used in CM gives the University a good deal of flexibility in building its course offerings.

### **Pros Supporting the Recommendation:**

- Each term is substantially different from other terms, making it difficult to define one SE object to satisfy the requirements of all terms. For example, a particular course may be offered only in the Fall, or it may be offered with x credit hours in the Fall and Spring but with y credit hours in the Summer, or Professor A may typically teach it in the Fall but Professor B may typically teach it in the Spring. The choice of assigning SE's by term allows these differences to be easily represented and facilitates the roll-forward process from year to year.
- The proposed naming convention includes both necessary elements -- term and section number.

### **Cons Against the Recommendation:**

- Maintaining SE's for each term results in more work up front, more data, and more relationships; however, it makes the roll-forward process cleaner and more straightforward. Additionally, it makes the selection of Event Packages during the event

planning process more complex because all existing event packages appear in the selection list to be offered.

**Issues, Concerns, or Currently Unresolved Aspects of the Recommendation:**

- There are training implications -- both for the end user and the course offering planner -- associated with all of these recommendations.
- Note that a closely related issue is how to handle conversion of course offering data from UM's legacy system to CM. This was addressed in the "Event Planning Conversion Strategy" proposal by Thurlow, Gates and Norman, which recommended automating as much as possible, especially the most simple, straightforward cases, but then using manual data entry for more complicated course offering relationships. We will need to identify individuals to assist with manual data entry.
- Further testing is required to fully understand more intricate aspects of event planning such as how resource conflicts (rooms, instructors), multiple instructors, and shared facilities (rooms shared by two classes that are not cross-listed) are handled.
- The entire area of copy/roll-forward options of class offerings needs to be tested and reviewed. Specifically, the role of templates and offering patterns needs to be carefully evaluated.
- The impact of event planning decisions needs to be closely reviewed in the context of course booking, grading, and Web presentation.
- The entire area of cross-listing will need careful review based on the approval of the event planning model and naming conventions. Specifically, the effect of capacity checking on the event planning model (we cannot place a size on each cross-listed course), cross-listings that change each semester, and the instructional funding cross-listings (i.e. US 101 and Hon courses).
- A related issue is defining the set of rules that should be enforced as part of the course booking process. This is being pursued separately.
- What kind of interface should be provided for changing section limits while registration is in progress?

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