Sectioning Handbook
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Sectioning Basics-Course Enrollment Process

Introduction

When students enroll in their primary course delivery method, i.e., lecture, they are also enrolled in a “placeholder” discussion, laboratory, film, etc. section

Lecture 001: 45 Students
Discussion D01: 45 Students
Both the Lecture and the Discussion were created as part of the Course Catalog Creation Process, by the Department’s Course Catalog Coordinator.

Users of the new Sectioning Tool will move students from the placeholder discussion section into individual class sections:

Accessing the Sectioning Tool
Accessing the Sectioning Tool

There are two ways to access the Sectioning Tool.

From the Teaching/Advising Center

1. Navigate to my.harvard.edu
2. Log in with your HUID and PIN or HarvardKey
3. Select the Teaching/Advising Center
4. You will see the Sectioning Option under My Courses:

The Class Sectioning page will open
From admin.my.harvard.edu

Administrative users can access the tool this way:

1. Navigate to admin.my.harvard.edu
2. Log in with your HUID and PIN or Harvardkey
3. From the Main Menu, select Records and Enrollment>>Sectioning>>Sectioning

4. The Class Sectioning Search page will open.
5. You will need to enter in a 4-digit value for the term (semester). Click on the magnifying glass and search for your term by year in the Description field.
6. Enter in the course subject and catalog number for your course
7. Click Search to open the Class Sectioning page for your course.
An Overview the Sectioning Tool

Sectioning Tab

The top part of the page is the header information for your course

1. **Tabs** move you through the main pages: Sectioning: contains course details, sections, preference rankings and enrollments; Modeling: Tab where you can create models to assist you with section enrollments; Reporting: Allows users to run pre-designed reports.

2. **Course header information** includes Course ID, Term, Subject, Catalog Number, and Course Title

3. **Refresh button** is used when canceling sessions or when you need to quickly refresh the data on the screen.

Sectioning Roster-Sections

The Sectioning Roster-Sections area contains:
1. **Update/View Preferences link**: Set up preferences for students to view available class sections and rank their preferences.

2. **Add New Section link**: This is the link you will use to create a new discussion, laboratory, film, etc., section.

3. **Components Table**: Allows you to view the current meeting pattern and the Head Instructor. You will also see the placeholder section (in this example, a Discussion) and the enrollments in that section. If you are using a placeholder discussion section, the enrollments for the lecture and the discussion should match.

When begin to build your individual sections, they will appear in the Component Table.

Columns on the component table include:

- **Available to Students**: After you create sections, check off this box to make the section available for students to view in the Student Center for ranking.
- **Section**: The unique section number for the Component (Lecture, Discussion, etc.).
- **Meeting Pattern**: The day(s) and time(s) the course meets for Lecture, Discussion, etc. The placeholder section generally will not have a meeting pattern.
- **Instructor**: The Instructor for the Lecture, Discussion, etc. Note that only the first Instructor for a particular component will appear on the table.
- **Enrollment Total**: The total number of students enrolled
- **Enrollment Capacity**: The total number of students who can potentially enroll
Roster-Roster Header

At the top of the list of students you will see a red header that offers some useful features:

1. **Personalize**: Allows you to change the column headings you see in the Roster. It is recommended not changing the column headings until you are more familiar with the tool.
2. **Find**: Brings up a dialog box allowing you to search for a particular student. The search result will bring the student up to the top of the list.

![Find dialog box](image)

3. ![Zoom icon]: This icon will zoom in on the roster to see a larger view.
4. ![Export icon]: This icon will allow you to export the roster of students to Microsoft Excel.

**Notes about exporting to Excel:**

- Be sure to click on the Select All box at the bottom of the Roster page so that you are selecting all of the students on your list. If you do not do this, the system will only export the first page of students.
- Depending on your web browser, the download to Excel may work slightly differently.
- Using Internet Explorer, the system will ask you to open or save the file
- Using Firefox, the system will download the Excel file. Select the green arrow found on the top right of the browser to view and open the file.
- Using Chrome, the system will download the Excel file to the bottom left of your screen. Double-click on it to open the file.

**Roster-Top Half**

1. **Show/Hide All Student Preferences**: This button will toggle information about student preferences. When you select Show All Student Preferences, a column appears in the roster to show the options (see example below):  

2. **Related Class Section Filters**: This option will allow you to filter roster results to show those students who are enrolled in a specific section. Simply enter the section number and click **Filter**.
3. **Roster**: You will see all of the students who are currently enrolled in the placeholder section. You can then select a student (or students) and move them into another section.

The column headings are:

- **Selected**: Check off the box to select a student. As you select students, you will see the Tally of Students Selected box update with the number of students you have selected.
- **HUID**: HUID
- ![Icon]: Clicking on this icon will show you the student’s schedule
- **Primary Section**: usually the section number of the Lecture
- **Name**: The student’s first and last name
- **Academic Level Start of Term**: The student’s grade level
- ![Icon]: This icon will reveal Student Preferences, if the student has designated any.
- **Student Preferences**: If the student has provided preference rankings, this column will appear when you select the Show Student Preferences button.
- **Related Class Section1**: Will show the section number of the first secondary component, such as Discussion
- **Component1**: Will show the type of secondary component, such as Discussion
- **Related Class Section2**: Will show the section number of any additional secondary component, if applicable.
- **Component2**: Will show any other secondary component, if applicable. For example, some courses section for both a discussion, and a laboratory.
1. **Select All**: Allows you to select all students on the roster
2. **Select None**: Allows you to remove the “select all”
3. **Email Selected Students**: Allows you to send an email to student you have selected, or to all students if you pressed Select All first
4. **Swap the selected student(s) into the following**: This will allow you to select into what section selected students will be moved.
5. **Submit**: This is the button that will move the students into the selected section.
6. **Refresh**: Should be selected after you have confirmed the submission to see your results.
7. **Upload File**: This allows you to download an Excel template and/or upload your own custom template with which to section students. There is more information later in the document.

**Prior Enrollment Transactions**

As you move students from one section to another, you will see the results of the transactions in this table.
Models Tab

This tab features the two models you can use to section students.

Section Models-Model Criteria

1. **Header Information**: The same course header information will appear at the top of the page.
2. **Model Method Distribution**: Select the model you wish to use. See the Modelling section of this handbook for more information.
3. **Select Student(s) from the following component**: Use the magnifying glass to select the section you wish to move students from.
4. **Section(s) into component**: Once you have selected the section you wish to move sections from, the list of available sections to move students into will appear.
5. **Consider Student Preferences if available**: One of the models will take student preferences into account if you select this checkbox.
6. **Run Model**: runs the selected model after you select the from and to sections

7. **Refresh**: Select Refresh after running the model to see your results.

8. **Upload File**: This allows you to download an Excel template and/or upload your own custom template to use if you choose to section students outside of the sectioning tool.

### Section Models-Review Model(s)

You will be able to review the results of the models in this area, deal with time conflicts, manually move students into other sections to resolve time conflicts and “lock” students into place so you can run additional models. See the Modelling section of this handbook for more information.
Reporting Tab

This tab offers a few sectioning reports which may assist in sectioning your students.

1. Course Header information: The same course header information also appears on this tab.

Queries

2. The list of available reports and a description of each report appears in the Queries section.
Create, Edit and Cancel Sections

You do not have to wait until the Study Card Deadline to build your sections in the sectioning tool—you may create sections at any time. You can then determine when and if you wish students to view sections for preference rankings.

*Please note that a student must be enrolled in the course before he/she can section for it.*

Before starting the process, look at the numbering convention for your sections:

**Best Practice Recommendation**: Continue to follow the numbering convention for your Discussion, Lab, Film, etc. In the above example, the Discussion is section 002. Therefore, when you create your first Discussion section, it should be 003. *Note that it is not possible to have duplicate section numbers. For example, if you cancel section 003, you may not re-use that number for another section.*

Create a New Section

**Step 1: Click the Add New Section link**
The **Section Add** Page will open.

After you click the Create Class Section button, you will be asked to Confirm that you wish to create a class section:
When the process is complete, you will receive a Complete message. Click Close to close the window.

Once you have selected the Create Class Section button, you will be returned to the main page where you will see your newly created section:

**Note:** Click the Refresh button to reload your data if the new section does not display.

Repeat the steps above to add additional sections.
Notes:

**Room Capacity: How to Request Space for Your Sections:** Some TFs have access to designated department space for sections, while others need to seek out University campus space. For a robust list of FAS classrooms, classroom attributes, and scheduler contact information for many of the classrooms in the FAS inventory go to “Room Information” on the [Media Services’ website](https://www.mediaservices.harvard.edu).

To request classroom space scheduled by the Registrar, please fill out the request form at [roombook.fas.harvard.edu](http://roombook.fas.harvard.edu). Most requests for section space are between Wednesday afternoon and Friday at 1 pm. You will greatly increase your chances of securing space from the FAS Registrar by requesting space earlier in the week, on Monday or Tuesday, or during the afternoon hours on Friday.

**Course Topic ID:** A new feature of my.harvard is the ability for a course to contain course topics.

For example, a course in Legal History could focus on the topic of Constitutional Law during one term; child labor laws the next term, etc. If the course catalog coordinator added topics to courses, you can click on the magnifying glass and select the topic for the section. If no matching values are found, then there are no Course Topics for your course.

In most cases, you will NOT find a Course Topic for your course. In this example, the field will remain blank.

**Important Note:** Course Topics are NOT Section Topics. There is no way to enter a Section Topic for an individual section at this time.

**Meeting Time:** Note there is a convention for how meeting times are added:

- If your meeting time starts in the AM, enter in the meeting time, such as 9 for 9 am; 9:30 for 9:30 am, etc.
• If your meeting time starts in the PM, enter in the meeting time followed by the letter “p”, such as 6p for 6:00 pm; 6:30p for 6:30 pm, etc.

Once you enter the meeting start time, hit the tab key. The End Time field will be entered in automatically.

Items to Note:
• The section time defaults to one hour
• The last minute of the hour is shortened by one minute

If your section is longer than one hour, you can manually change the End Time field to the appropriate length. **If you do so, you will need to shorten the end time by one minute.**

The end time field must be shortened by one minute because if a student attempts to enroll in class that starts at 7:00 pm, the system will not allow it, indicating that the student has a time conflict with your section.

**Instructor:** The addition of Instructor is optional. You may input this information at a later date.
  • If you wish to add a second instructor for your section, click on the + sign to the right of the field to create a new Instructor field.
  • The minus sign will delete an instructor.

**Note:** If you have added more than one instructor, only the first instructor will appear on the Class Sections page.

**Grade Roster Access:** There are three values available for this field; however, you should not select the Post option. This is reserved for the Head Instructor of the course only.

• **Approve:** allows instructor to enter and approve grades
• **Grade:** allows instructor to enter grades
Edit a Section

You may edit any section that you have created:

<table>
<thead>
<tr>
<th>Enrollment Total</th>
<th>Enrollment Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>999</td>
</tr>
<tr>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>0</td>
<td>10</td>
</tr>
<tr>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>50</td>
<td>999</td>
</tr>
<tr>
<td>0</td>
<td>10</td>
</tr>
</tbody>
</table>

1. Select the Edit icon
You may edit the following fields:

As with the creation of a class section, you will be asked to Confirm the edits. When the operation is Complete, close the Complete window.

**Note:** Click the Refresh button to reload your data if you do not see your edits.

The Class Sections page will display the edited information:
Cancel Sections

If you need to remove a section, you must cancel the section. There is no ability to delete sections.

**Important Note:** It is NOT possible to cancel a section that contains student enrollments. If you must cancel a section that has student enrollments, please email the Registrar’s Office at sectioning@fas.harvard.edu to cancel the section from the Schedule of Classes. The Schedule of Classes is a record associated with the Course Catalog that includes the ability to cancel a section that includes student enrollments.

To cancel a section:

1. Click the Cancel icon
2. You will be asked to Confirm the cancellation. Click Refresh after the cancellation:

3. Click Confirm. You will receive a Complete message when the operation finishes. Click Close to close the window.

The canceled section will still appear on your list of sections:

4. You MUST hit the Refresh button in order for the canceled section to be removed from the list.
Create, Update Student Preference Rankings

After you finish creating your sections, you can notify students and ask them to send their sectioning preferences. The tool allows students to rank their preferred class section dates and times. You can set the number of rankings they can select: anywhere from 0 up to 9 choices.

The preference rankings will appear in the student’s enrollment page in the my.harvard Student Center.

**IMPORTANT:** Only students who have enrolled in the class can submit preferences. This is a change in practice from the old sectioning tool. The new student information system ties real enrollments with the sectioning tool.

This step is optional. You do not have to request preference rankings from students.

You also have the additional option of sending an email to students to let them know that sections are available for them to review and rank.

**Setting Up Preferences**

Follow these steps to enable students to submit preferences:

Another Class Sectioning page will open:
Important Note about the End Date: In the example above, the end date is 9/14/15. *The preferences period will end at 9/14/15 at 12:01 am.*

**Making Sections Viewable in the Student Center**

Once you have set up the Preferences, you can then select the sections for which you would like the student to rank.

In the Components Table, check off the Available to Students checkbox next to each section you would like the student to rank:
<table>
<thead>
<tr>
<th>AvailableTo Students</th>
<th>Section</th>
<th>Component</th>
<th>Meeting Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>002</td>
<td>Discussion</td>
<td></td>
</tr>
<tr>
<td></td>
<td>006</td>
<td>Discussion</td>
<td>R 06:00 PM - 05:59 PM</td>
</tr>
<tr>
<td></td>
<td>007</td>
<td>Discussion</td>
<td>F 04:00 PM - 04:59 PM</td>
</tr>
<tr>
<td></td>
<td>004</td>
<td>Discussion</td>
<td>T 07:00 PM - 07:59 PM</td>
</tr>
<tr>
<td></td>
<td>003</td>
<td>Discussion</td>
<td>M 06:00 PM - 06:59 PM</td>
</tr>
<tr>
<td></td>
<td>001</td>
<td>Lecture</td>
<td>TR 01:00 PM - 02:29 PM</td>
</tr>
<tr>
<td></td>
<td>005</td>
<td>Discussion</td>
<td>W 08:00 PM - 08:59 PM</td>
</tr>
</tbody>
</table>

**Important Note:** Checking off the Available to Students checkbox makes the section immediately visible to students in the Student Center. The student does NOT receive any formal notification that the sections are available to rank.
How Students Rank Preferences in the Student Home

Here is an example of what the student will see in the Student Home:

In their list of enrolled classes, students will see a widget icon to the right of their classes that have section ranking preferences:
This page will open:

- Students add sections to their choices by clicking on the + sign.
- Students can move their choices up or down by clicking on the up arrow or down arrow.
- Students can add or delete from their choices. They can also select a different number of sections from lab vs. discussion as long as they stay above the minimum and below the maximum allowed for the course as indicated above.
- Students can make their selections within the date range noted above.
• When students complete their selections, they need to click the Submit button.

If the student is successful, he/she will receive the following message:

Sending an Email Notification to Students

As indicated, when the preferences are made visible to the student, the student does not receive any notification that the preference rankings are available for consideration. Therefore, you may wish to notify your students that preference rankings are available for their review.

Follow these steps to send an email to one or more students:

1. If you wish to notify one or a small group of students, check off the Select box to the left of the student:

2. If you wish to notify all students, click the button:

3. Once you have made your selection, click the button.
Note that the email will identify you as the sender, not the system.

**Best Practice Recommendation:** As sectioning students can become a highly individualized process, you may wish to inform students that you email that they will soon see their section enrollments in the Student Center. While the system will automatically enroll students into a section when you submit a model or move students individually into sections, these sections may not be your final choices for the student. You will want to tell students that you will be sending them a final email after all of the sectioning work is completed to confirm that what the student is seeing in the Student Center is their final scheduled section.

See the Moving Students into Sections, Mitigation Issues, for more details.

**Viewing Student Preferences in the Sectioning Tool**

There are two ways to view student preference rankings in the Sectioning Tool.

1. **View individual preferences from the Roster.** You can see an individual student’s preferences by selecting the [Show All Student Preferences] button or click on the [Student Preferences] icon from the Roster.

2. **Run the Student Preferences Report from the Reporting Tab.** If you wish to see preferences from all students in one place, select the Reporting Tab and click on the Student Preferences report.
<table>
<thead>
<tr>
<th>Queries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students Not Sectioned</td>
<td>This report will identify students that have been enrolled, but have yet to be sectioned either via enrollment or modeling.</td>
</tr>
<tr>
<td>Students Sectioning By ID</td>
<td>This will report on all student in the selected course. The output is sorted by ID.</td>
</tr>
<tr>
<td>Students Sectioning By Name</td>
<td>This will report on all student in the selected course. The output is sorted by Last Name.</td>
</tr>
<tr>
<td>Student Preferences</td>
<td>This will display the students preferences for the selected course.</td>
</tr>
</tbody>
</table>
Moving Students into Sections

There are a few ways you can move students into sections:

Option 1: Use a Model.

Option 2: Select and manually move a student or group of students into a section.

Option 3: Upload a properly-formatted Excel file into the tool, indicating which sections you wish to move students.

Best Practice Recommendation:

1. Use one or both of the available models to move students into sections first.
2. Then individually move students who have time conflicts or other conflicts into sections.

Why use a model?

The main reason to use a model first vs. moving students into a section one at a time has to do with current system functionality.

<table>
<thead>
<tr>
<th>Model Advantages</th>
<th>Moving Student(s) Individually</th>
</tr>
</thead>
<tbody>
<tr>
<td>• When a model is used, a student is moved into a “Pending” status, meaning that you are considering moving the student into that model. The student is not yet enrolled in the section.</td>
<td>• If you choose the option to move a student individually into a section, the student is immediately enrolled into the section. The student will see that he/she is enrolled in the section in the Student Center. See the mitigation steps below to assist with this issue.</td>
</tr>
<tr>
<td>• While in the Pending status, you will immediately see if the student has time conflicts or other conflicts, such as a hold,</td>
<td>• When you move a student</td>
</tr>
</tbody>
</table>
preventing enrollment in a particular section. You can resolve time conflicts manually by moving a student into another section, or you can re-run a model, while the student is still in this pending status.

- You can move students with no conflicts into a specified section by “locking” them into place. This “locked” status still does not enroll the student. It simply removes the student from being included in any subsequent model runs.
- As you are running models, you can lock students with no conflicts until you have completed your model scenarios. You can then submit the locked model and enroll the students all at once.
- You can still individually move outliers after resolving time and other conflict issues if one or more students do not fit into a particular session. See mitigation issues below.
- A student does not have to be in a locked model to be enrolled into a section. You can submit a pending model as well.

individually into a model, the student will not be moved if there is a time or other conflict. You will receive an error message and will have to resolve the conflict by moving the student into another section, or deal with mitigation issues.
Mitigation Issues

I have a student or students who cannot make any of my sections. What should I do?

Contact the student via email to resolve conflicts. You can send the message via the Sectioning Tool email utility. You may have to create additional sections or make other arrangements.

I have a student who is involved in extracurricular activities such as Athletics, Music, etc. Will the tool take these types of conflicts into account?

No. The tool does not take non-academic scheduling conflicts into account. You will need to work with the student individually to find a solution.

Is it possible to submit all of my students into my prescribed sections all at once?

You can move all students if you use the model or upload an Excel file. You can submit a pending or locked model which will then enroll all of the students into the section that you have specified. You can also upload a file into the Sectioning Tool which will move students from one section to another. You are not required to move all students at once using either method, but these are the options you will use if you wish to do so.

Regardless of the option used, as soon as you submit the model, students will be notified. If you are moving students into sections sequentially, it may mean that some students will be notified before others.

To mitigate the issue that all students may not be notified at once of their final sections, you may want to email students in advance, letting them know that you will confirm final section assignments once you have concluded the sectioning process.
Using Models to Move Students into Sections

Start the process by selecting the **Models** Tab.

There are two model choices:
- The **Sequential Class Sections** Model enrolls students into sections sequentially based on seat availability.
- The **Even Distribution Model** evenly enrolls students across all sections. This model does not take into account student preferences.

**The Sequential Class Sections Model**

The Models page will default to the Sequential Class Sections Model

1. Use Sequential Class Sections is available by default
2. Select the component type
3. Check off the box next to the enrolled component from which you wish to move participants
4. Select the section(s) from which you wish to move enrollments
5. This model will take into account student preferences if you wish
6. Click Run Model when you are ready
7. Refresh when job is finished

When you click Run Model, then Confirm. When the process is complete you will see the Complete window. Click Close.
After you run the model, you will see the Pending Status results below:

<table>
<thead>
<tr>
<th>From Section</th>
<th>To Section</th>
<th>Lock</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>002</td>
<td>005</td>
<td></td>
<td>Pending</td>
</tr>
<tr>
<td>002</td>
<td>006</td>
<td></td>
<td>Pending</td>
</tr>
</tbody>
</table>

### The Even Distribution Model

Select the Even Distribution Model from the drop down:

Follow the same steps to run this model as you did for the Sequential Model.

**Important Note:** Student preferences can NOT be taken into account when running this model.

After you run the model, you will see the Pending Status results below.
Reviewing the Model Run Results

When you begin to review model results, you will see two possible statuses:

**Pending**: These students have been moved into the section based on the model and are being considered for enrollment in the section. The student will not be enrolled until you submit a model.

**Locked**: It is possible to move a student who fits into the section for which you ran the model into a “locked” state. This does not enroll the student in the section, but will keep the student in that section as you run other models and work with other students. When you are ready to enroll the student, you can submit the locked model and the student will be enrolled.

In this example, both models were run. When you look at the Review Models header, you will see that three records were created:

![Review Model(s) Table]

The first will display the roster of students using the Even Distribution Model, as it was the last model run in this example. The status of these students is “Pending”, meaning that you are reviewing the results and deciding whether or not to keep the student in the assigned sections.

The second will display the roster of students using the Sequential Class Sections Model, as it was the first model run in this example. These students are also in a “Pending” status.
The third is a page called LOCK:

![Image of LOCK page](image)

As you are working with the roster of students from your models, you can move those students who you are certain about enrolling in a particular section into the LOCK list. Then, as you re-run models, these students will not be moved from their “locked” status.

Putting students into the LOCK status does NOT permanently enroll them in the section. You can move students into LOCK as you work through your model scenarios.

### Working with Model Results

- You can rerun models as many times as you need to, move students into other sections based on the results or conflicts and move students into the LOCK model.
- You can also Delete Models you do not need by using the Delete Model button.
- When you are ready to enroll students, you can submit the model. You can submit either a Pending model or the LOCK model (or both). **As soon as you hit the Submit Model button, the student will be enrolled into the section. The student will see the enrollment in the Student Center.**

The next topics discuss various scenarios using models.
Moving Individual Students from one Section to Another

If you wish to move a student from one section to another, you can easily do this by clicking on the magnifying glass next to the section number:

<table>
<thead>
<tr>
<th>From Section</th>
<th>To Section</th>
<th>Lock</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>002</td>
<td>005</td>
<td></td>
<td>Pending</td>
</tr>
</tbody>
</table>

A Lookup window will open displaying your created sections. Simply click on the link of the section you wish to move the student into:

The student will be moved into the section. Note that the status is still “Pending”, thus the student has not yet been enrolled in the section:
Working with Time Conflicts

If a student has a time conflict, you will see this icon appear on the list:

If you click on the icon, a screen will appear informing you that there is a time conflict.

To resolve the time conflict, move the student into another section, as demonstrated in the previous topic.

Once you have moved the student, click on the green arrow to see if this resolves the conflict:

If the conflict is resolved, the icon two icons will clear:
Moving Students into the LOCK Model

If you are satisfied with where a student has been sectioned, you can lock that student into place. Locking students is optional, but it is a good way to narrow down the list of students you will need to work with in order to section.

A locked student will remain in the proposed section and will not be included in subsequent model runs.

1. To lock a student, simply select the Lock checkbox next to the student’s name.

2. When you now move to the LOCK results, you will see the students appear here:

Deleting a Model

To delete a model:

1. Select the Delete Model button:
You will receive a Confirmation message informing you that **if you have locked any students in this model, they will also be removed from the LOCK status**:

2. If you wish to continue, click Confirm.
3. You will receive a Complete window; click Close

4. Click the **Refresh** button to remove the model.

**Submitting a Model**

You can submit either a Pending Model or a LOCK Model. In most cases, you will want to move students into the LOCK model so that you are only working with students with conflicts.
Important Note: Once you submit a model, the student is enrolled into the section. This information will appear immediately to the student on their enrollments in the Student Center.

Locking a student into a section does not mean that the student is permanently enrolled in the section. You can continue to manually move enrolled students into other sections. Be aware that if you do this, the student will see the subsequent section change immediately in the Student Center.

**Best Practice Recommendation**: To mitigate potential confusion, you may wish to send an email to students letting them know that while they will begin to see section enrollments, you will be sending them a final email confirmation when you have completed the process.

To submit a model:

1. Click the **Submit Model** button
2. You will receive a Confirmation Message. Note that the message reminds you that the submission will result in the section being posted to the student’s record.

![Confirmation](image)

**Warning**: By submitting this model, it will post to the student’s enrollment record.

Note: During high volume processing could be slower to create models or post enrollments.

3. Click Confirm
4. You will see a Complete Message. Click Close
5. Click **Refresh** to see the results.

**Reviewing Submission Results**

Each student row will indicate whether the enrollment was successful or if there was an error.

<table>
<thead>
<tr>
<th>Class Section</th>
<th>Related Class Number 1</th>
<th>Related Class Section 1</th>
<th>Related Class Number 2</th>
<th>Related Class Section 2</th>
<th>Errors</th>
<th>Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>002</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>002</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Error messages may include:

- Time conflicts
- A student has a Hold on their account that will prevent enrollment

For time conflicts, use the methods described earlier in this document.

If a student has a hold on their account, send an email to the student requesting more information.
**Using the Roster to Manually Move a Student or Group of Students into Sections**

In addition to using models, you can also manually move a student into a section from the Roster found on the Sectioning Tab.

Important things to note about manually moving students into sections:

1. When you move a student into a section using this method, the student will be **immediately** enrolled into the section. There is no pending or locked status.
2. You can use this method to move students already enrolled into a section into another section.
3. You can filter to view all students in each enrolled section, making it easier to find them and move them around.

**Using Filters**

Another helpful feature of the Roster is the ability to use filters. If you have moved a number of students into your created sections, you can filter on the placeholder section to see how many students are remaining.

To do this:

1. Type or click on the magnifying glass to select a section
2. Click the Filter button

Only those students enrolled in the chosen section will appear on the roster.
To manually move a student or a group of students into sections:

1. Navigate to the Sectioning Tab.
2. In the Roster, click the Select checkbox next to the students you wish to move

3. If necessary, scroll down to the bottom of the page. Type in or click on the magnifying glass next to the Swap the selected student(s) into the following field

4. Click Submit. You will receive a dialog box informing you that by confirming the submission, you will be enrolling these students into the section:
5. Click Confirm.
6. You will receive a Complete message; click Close
7. Click Refresh to see the results.
8. As you saw when you submitted models, you will see a success message if you are successful and an Error message if you are not successful.
Uploading an Excel Template File to Move Students into Sections

It is possible to move students into sections by uploading an Excel file that will move students from the placeholder section into the section(s) you designate.

In order to use this method, you must first create the sections. Once the sections are created, you can then either download a pre-designed template file or upload your own custom file into the system.

There are two methods for uploading sectioning information for a course with the Sectioning Tool:

- **Uploading a Standard Template File** (Best Recommended Practice): Use a Standardized Template File when you are sectioning a course where enrolled students are tracked by my.harvard.
- **Uploading a Custom File**: If you section enrolled students outside of the my.harvard sectioning tool, you may Use a Custom File to upload your final section results to my.harvard. For complete instructions on how to use a custom file, see the sectioning document titled: Using a Custom Excel File to Upload Lists of Students into Sections.docx

### Downloading the Standard Template File

To use the standard template file you must first download the template:

1. From the Sectioning Tab, navigate to the Roster Section and select the Upload File button. Note that you can also download the file from the Models Tab.
2. Navigate to the **Download a File Template**... section.

![Class Sectioning - File Upload](image)

3. Click the magnifying class next to the **What Class Component would you like for your template**.... The Course Component window will open:

![Look Up What Class Component would you like for your](image)

4. Select the appropriate section component (DIS, LAB, etc.).

Note that you must download a separate template for each section component; you will download and upload a template to move students into Discussion sections and a second template to move students into Lab sections.
After making the selection, you will return to the Upload File page.

5. Click the **Click to create a file template for the class** icon.
6. Click *Excel Spreadsheet* to download the results to Excel. Note that there is also the option to download the template as a CSV text file and as an XML file.

7. Depending upon the browser you are using, use the **Save As option** of the download and save the file using a name that identifies the file to upload.

**Prepare the Downloaded Standard File for Uploading**

Once you have downloaded the template, open it and prepare the file:

1. Open the saved file in Excel:

2. **Ensure that the columns labeled ID, From Section and To Section are text format.** This step is necessary to ensure that leading zeros, if present, are preserved.
Hint: Highlight the column, right click, then select **Format Cells** and select **Text** from Format Cell window that appears.

3. **Enter** the To Section for each student being sectioned.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>From Section</th>
<th>To Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Harvard</td>
<td>002</td>
<td>003</td>
</tr>
<tr>
<td>Jane Harvard</td>
<td>002</td>
<td>003</td>
</tr>
</tbody>
</table>

You have options as to how you wish to section students using this method:

A. You can move all students on the spreadsheet into sections.
B. You can move students into different sections; you do not have to move students into a single section.
C. You do not have to move all students into sections. You can select which students to move using the template file. If you do not wish to move all students into sections at this time, you must **remove** all students from the wish you do not wish to move.

4. Unless you wish to section all students using this upload method, **remove** students **NOT being sectioned and those that are remaining within a section** from any previous upload, manually sectioned or sectioned with a saved and submitted model.
5. Ensure that the file is ONLY sectioning students for a specific Class Component. In this example, you are moving students from the placeholder discussion section into one of the discussion sections you created earlier.

6. **Save** the original file as Excel format. Maintaining the original file with the sectioning information may prove to be helpful in the event that the file upload is not successful.

7. Save the file again as **.csv format**. Files uploaded **must be** in .csv format.

If using a PC, save the file as CSV (MS-DOS) (*.csv).

If using a Mac, save the file as Comma Separated Values (.csv).
If you receive a format error message when saving as a CSV file, click Yes to keep the format:

Upload the Standard File

Once you have saved the file in the .csv format, return to the Sectioning Tool to upload the .csv file:

1. On the Sectioning Tab, navigate to the Roster Section and select the Upload File button. Note that you can also access the Models Tab and select the Upload File button from that tab as well.
2. Navigate to the **Upload File to Process** section.

3. Click the magnifying glass next to the **What Class Component (e.g. LAB, DIS) does this file contain?** Section and select the appropriate component.
4. After selecting the component, you will return to the File Upload page with the component filled in:

5. Click on Attach File Icon.

6. On the File Layout ID window that displays, click the Look up.
7. Select **DEFAULT – SYSTEM CREATED**.

8. You will return to the File Upload page with the choice filled in. Click **OK**:

9. Click the **Browse button** and locate the file on your computer.
10. Click **Upload**.

11. Check the results. See the section on **Upload Results**.

---

### **Upload Results-Errors**

When an **error** is encountered with the file format:

An error message displays immediately. Click **OK**.

You return to the upload window. The file name attempting to upload displays within the Attached file field. The status displays within the File Status field. In this case, **Error** displays.
Resolving Upload Errors

Important Note about resolving file format errors:

Do NOT re-open the .csv file to resolve errors. You will lose all text formatting if you do so. Re-open the file in Excel format, resolve the errors, and save again as a .csv file.

If you need to re-post a file

If you receive errors and need to repost a file, you will need to click on the + sign located on the upload file page:

This will allow you to re-post the file. You can overlay existing results.

Upload Results-Correct

When the File format is correct:
You return to the File Upload Window. The attached file name appears within the Attached File field. The status displays within the File Status field. In this case Passed displays.

Within the Review File Load section, click Refresh until the results of the upload appear. Students will appear with a status of Pending:

The Sectioning Tool will indicate if there are time conflicts. The file upload will NOT take into account Student Preferences.

Posting Results

When you are ready to post the file, click the Post File button. Please note that any student that has the status of Success will be immediately notified in the student portal that they are now enrolled in a specific section.
The Posting Status Column will indicate “Success” if the student was successfully assigned to the intended section. The status column will indicate “Errors” if an error occurred while processing the student section.

Check the errors for time conflicts.
Uploading a Custom Excel File to Move Students into Sections

If you section enrolled students outside of the my.harvard sectioning tool, you may Use a Custom File to upload your final section results to my.harvard. In order to use this method, you must first create the sections. Once the sections are created, you may upload your own custom file into the system.

Requirements for Custom File

When using a Custom file, the file MUST contain information that can be mapped to several components, most of which can be found in the Course Header Section within the tool:

- **Course ID** – Can be found in the Course Header Section
- **Course Offering** – The number associated with course offering; see the course header
- **Term** – term code associated with the term (e.g., 2163 for March 2016)

Hint: The term session code is a four digit number.

- The first number will always be 2 for the 2000 millennium
- The second and third numbers will be the last two digits of the current calendar year, e.g., 16 for 2016
- The third number will be specific for the Fall or Spring term. If it is the Fall term, the number will be 8. If it is the Spring term, the number will be 2.
Thus for Spring 2016, the number will be 2162.
  * **Session Code** – The academic session; see the course header section.

Additional information required for the custom file includes:

  * **Student ID (or HUID)** – student identifier or Harvard ID.
  * **From Section** – section moving from
  * **To Section** – section moving to

Other information contained within the file is *ignored* when processing the information in the file during uploading.

**Sample Custom file**

In this example, Columns A, I and J are ignored. Other columns are mapped when uploading.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Student Name</td>
<td>HUID or ID</td>
<td>From Section</td>
<td>To Section</td>
<td>Term</td>
<td>Offer Nbr</td>
<td>Session</td>
<td>Course ID</td>
<td>Preference</td>
</tr>
<tr>
<td>2</td>
<td>John Harvard</td>
<td>10802741</td>
<td>002</td>
<td>003</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>003</td>
</tr>
<tr>
<td>3</td>
<td>Jane Harvard</td>
<td>10802742</td>
<td>002</td>
<td>003</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>003</td>
</tr>
<tr>
<td>4</td>
<td>Jack Harvard</td>
<td>10802743</td>
<td>002</td>
<td>004</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>003</td>
</tr>
<tr>
<td>5</td>
<td>June Harvard</td>
<td>10802744</td>
<td>002</td>
<td>004</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>005</td>
</tr>
<tr>
<td>6</td>
<td>Jerid Harvard</td>
<td>10802745</td>
<td>002</td>
<td>004</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>003</td>
</tr>
<tr>
<td>7</td>
<td>Jervis Harvard</td>
<td>10802746</td>
<td>002</td>
<td>004</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>004</td>
</tr>
<tr>
<td>8</td>
<td>Joaquin Harvard</td>
<td>10802747</td>
<td>002</td>
<td>004</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>004</td>
</tr>
<tr>
<td>9</td>
<td>Juan Harvard</td>
<td>10802748</td>
<td>002</td>
<td>005</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>005</td>
</tr>
<tr>
<td>10</td>
<td>Janet Harvard</td>
<td>10802749</td>
<td>002</td>
<td>006</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>003</td>
</tr>
<tr>
<td>11</td>
<td>Jessica Harvard</td>
<td>10802750</td>
<td>002</td>
<td>006</td>
<td>2162</td>
<td></td>
<td></td>
<td>110856</td>
<td>005</td>
</tr>
</tbody>
</table>

**Prepare the Custom File for Uploading**

1. Open the saved file in Excel.
2. **Ensure that the columns labeled ID, From Section and To Section are text format.** This step is necessary to ensure that leading zeros, if present, are preserved.
Hint: Highlight the column, right click, then select **Format Cells** and select **Text** from Format Cell window that appears.

3. Enter the To Section for each student being sectioned.
4. If not sectioning all students, remove students *NOT being sectioned and those that are remaining within a section* from any previous upload, manually sectioned or sectioned with a saved and submitted model.
5. Ensure that the file is *ONLY sectioning students for a specific Class Component*
6. **Save** the original file as **Excel** format.

**Upload the Custom File**

1. Return to the Sectioning Tool and navigate to the Roster Section and select **Upload File** button.

2. Navigate to the Upload File to Process section.
3. Click the **What Class Component (e.g. LAB, DIS) does this file contain?**
   **Look Up** and select the Class Component:

4. You will return to the file upload page.
5. Click on Attach File Icon.

6. On the File Layout ID window that displays, click the Create New File ID...link. Note: If you have already uploaded a file, you may have already created a File Layout ID. In this case, you select the Look up and select the existing File ID from the list that appears.

7. Map your custom file so that it can be read by the my.harvard system on the File ID Creation window. Identify the location of the columns on your spreadsheet that will be required for the file to be uploaded into the Sectioning Tool.
Best Recommended Practice:

1. **Open** the custom file uploading in Excel to verify the location of each column.

2. **Examine** the file and determine whether or not there is a column header.
   - If NO column header, **uncheck** the box of Does File Have Column Header.
   - Otherwise, leave the box checked and enter the number of lines that make up the header
3. Complete the remainder of the fields:

A. Enter a name for the **File ID** field. You can give the file any name you desire

B. Enter a short description for the upload in the **File ID Description** field.

C. Enter a description of the usage of the File ID in the **Usage** field.

D. Determine the location of the **Course ID**.

The location is determined by counting over to the appropriate column. For example, the Course ID is located in column 8.
Enter the location of the Course ID in the Course ID Location field.

In the same manner, enter the column location of each of the remaining fields (Course Offering, Term, Session Code, Student ID or HUID, From Section and To Section).
4. **Save the file uploading as .csv format.** *Note: Files uploaded must be* in the csv. format.

If using a PC, save the file as CSV (MS-DOS) (*.csv).
If using a Mac, save the file as Comma Separated Values (.csv).

You may receive an error message when saving as csv file:
Click Yes to keep the format and complete the Save process.

5. Return to the Sectioning Tool and click Save on the File ID page.

6. You will return to the File Layout ID page. Click OK.
7. Click the **Browse button** and locate the file on your computer.

8. Click **Upload**.

9. Check the results. See the section on Upload Results.
Upload Results-Errors

When an error is encountered with the file format:

An error message displays immediately. Click OK.

You return to the upload window. The file name attempting to upload displays within the Attached file field. The status displays within the File Status field. In this case, Error displays.

If you need to re-post a file

If you receive errors and need to repost a file, you will need to click on the + sign located on the upload file page:

This will allow you to re-post the file. You can overlay existing results.
Upload Results-Correct

When the File format is correct:
You will return to the File Layout ID window.

File Layout ID

![File ID Selection](image)

Click Cancel to return to the File Upload Window to see your file status.
The status displays within the File Status field. In this case Passed displays.

![Upload File To Process](image)

Within the Review File Load section, click Refresh until the results of the upload appear. Students will appear with a status of Pending:

![Review Load](image)

The Sectioning Tool will indicate if there are time conflicts. The file upload will NOT take into account Student Preferences.
Posting Results

When you are ready to post the file, click the **Post File button**. Note that any student that has the status of Success will be immediately notified in the student portal that they are now enrolled in a specific section.

The Posting Status Column will indicate “Success” when sectioning processed successfully for the student. The status column will indicate “Errors” when an error occurred while processing the student section.

Check the errors for time conflicts.
Reports

The Reporting Tab has a few reports available to assist you with sectioning. Please contact the my.harvard team at myharvard_support@harvard.edu if you have any suggestions for additional reports.

<table>
<thead>
<tr>
<th>Queries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students Not Sectioned</td>
<td>This report will identify students that have been enrolled, but have yet to be sectioned either via enrollment or modeling.</td>
</tr>
<tr>
<td>Students Sectioning by ID</td>
<td>This will report on all student in the selected course. The output is sorted by ID.</td>
</tr>
<tr>
<td>Students Sectioning by Name</td>
<td>This will report on all student in the selected course. The output is sorted by Last Name.</td>
</tr>
<tr>
<td>Student Preferences</td>
<td>This will display the students preferences for the selected course.</td>
</tr>
</tbody>
</table>

To run a report:

1. Click on the link
2. Click Run

The report can be output as HTML, where it will appear on the screen, or by .csv, which will allow you to open it in Microsoft Excel.
Where to Get Help

To get help with the Sectioning Tool:

- For business process questions, please email the FAS Office of the Registrar at sectioning@fas.harvard.edu.
- For technical issues please contact the HUIT Help Desk at 617-495-7777 or email myharvard_support@harvard.edu with any questions or concerns.