# Advisor Dashboard Manual

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Student Scheduling Dashboard Manual

Accessing the Student Scheduling Dashboard

User will log in using the following steps:

- www.mypurdue.purdue.edu
- Go to Banner tab, and click on Unitime
- Enter your Purdue credentials

When a user logs into UniTime, if the user’s default user role has access to the Scheduling Dashboard in the academic session in which the user is logged in, then a menu item for The Scheduling Dashboard should be visible. If the Scheduling Dashboard is not visible, then the user may need to switch to a different role or a different academic session.
The user can see their role listed under their name at the top of the page and see the academic session is listed in the top right hand corner of the page.

The role listed under the user’s name determines the functionality available to the user in the Scheduling Dashboard. Before selecting the Scheduling Dashboard menu item, the user should review their user role and academic session to ensure they are accessing the Scheduling Dashboard with the functionality for the role they are operating within and the academic term they wish to work with.

If a user needs to change the role or academic session this can be accomplished by clicking on the label for the academic session.

This brings up the “Select User Role” page. For purposes of this documentation, the user will select their “Student Advisor” role.

Once a role is selected, the role listed under the user’s name will be updated to reflect the selected role. The academic session listed in the upper right hand corner will reflect the selected academic session.
Once the user has determined they are using the desired user role and academic session they can click the “Scheduling Dashboard” menu item.

This will take the user to the “Online Student Scheduling Dashboard” page.
Using the Student Scheduling Dashboard Filter

The filter at the top of the “Online Student Scheduling Dashboard” page controls the search criteria used to display data on the page. When the user accesses the “Online Student Scheduling Dashboard” page for the first time the filter will be blank. Once the user has entered a search criteria in the filter and performed a search the page will remember the last search performed by the user and automatically populate the filter with that search criteria the next time the user accesses the page.

**Note:** It is very important for the user to enter search criteria into the filter. If the user enters no search criteria, the Online Student Scheduling Dashboard will return data for all students and all courses. This returns a very large volume of data and the user’s browser will struggle or fail to render the data returned.

![Online Student Scheduling Dashboard](image-url)
Typing into the Filter

If the user knows the data they wish to search for they can type the search criteria directly into the filter and it will begin to show “suggestions” for filter parameters.

The user can then select an item shown in the “suggestions” or the user can continue to type and press enter. This will then show the search criteria item with a colored background that indicates the search criteria been added to the filter.
Using the Filter Drop Down

If the user is unsure of the search they need to use, they can use the drop down within the filter to enter their search criteria. To access the drop down within the filter the user clicks on the inverted triangle on the right hand side of the filter box.

This causes the Filter Drop Down to appear.
The filter drop down lists the various pieces of data available to be used as search criteria for retrieving data within the Scheduling Dashboard.
When known, next to each item that can be selected is a count of records that will be returned as a result of using that item as a search criteria in conjunction with the other items already selected in the search criteria.

At the bottom of the filter is a text box for entering “Course” search criteria (e.g., COM 11400) and a text box for entering “Student” search criteria (e.g., John Doe).
To build a query the user selects items from the Filter Drop Down. As the user selects items in the Filter Drop Down, the possible items to select within the drop down change dynamically to reflect the restrictions placed on the search.

When the user is done building their search criteria they click outside of the Filter Drop Down to return to the Filter Box.

The user can then type in additional search criteria if they wish. When the user is satisfied with their search criteria they press the “Search” button to perform the search.
Using the Student Scheduling Dashboard

The data retrieved by doing a search using the criteria entered in the Filter is available to the user in a set of tabs. Each tab provides a specific view into the data. The Enrollments Tab shows the data organized by Course Offering. The Student Tab shows the data organized by Student. The Change Log Tab, which is not available to all users, shows the change log data associated with the information retrieved by the search criteria. The user can switch between the Enrollments Tab, the Students Tab and the Change Log Tab by clicking the desired tab name.

![Tab Navigation](image1)

The data displayed on the selected tab of the Student Scheduling dashboard may be exported in comma separated format by pressing the “Export Button” to the right of the Filter.

![Export Button](image2)
Using the Enrollments Tab

The Enrollments Tab provides a course centric view into the student scheduling data displayed in the Dashboard. This tab displays the data grouped by course.

The data on the Enrollments Tab can be sorted by any column listed on the table. To do this click on the column label for the column to sort. The first click on the column sorts the table by the data in ascending order. The second click on the column sorts the table by the data in descending order. It is also possible to use the drop down menu on the “More” button to select the column to sort.
If the user clicks on the plus icon next to a course it will expand the data displayed to include each class section that makes up the course.

Once the class data is expanded, if the user clicks on the minus icon next to a course it will hide the class section data.

Interpreting the Data on the Enrollments Tab

The Enrollments Tab was designed to display a large amount of data in a compact format. The following is a description of each data column displayed on the page:

- **Subject** - This label applies to the course level data displayed. This is the subject area abbreviation for the course displayed.
- **Type** - This label applies to the individual class sections listed under a course if the plus icon next to it has been clicked to show the class section data. If a class section is displayed, its instructional type will be listed in this column.
- **Course** - This label applies to the course level data displayed. This is the course number for the course displayed.
- **CRN-SectionId** - This label applies to the individual class sections listed under a course if the plus icon next to it has been clicked to show the class section data. If a class section is displayed, its CRN and Banner Section Id is listed in this column with a dash separating the two values.
- **Title** - This label applies to the course level data displayed. This is the title for the course displayed.
- **Time** - This label applies to the individual class sections listed under a course if the plus icon next to it has been clicked to show the class section data. If a class section is displayed, its time statement is listed here.
• **Date** - This label applies to the individual class sections listed under a course if the plus icon(+) next to it has been clicked to show the class section data. If a class section is displayed, the dates it is offered are listed here.

• **Consent** - This label applies to the course level data displayed. If a course requires a student to obtain consent of the department or instructor, the type of consent required is listed here.

• **Room** - This label applies to the individual class sections listed under a course if the plus icon(+) next to it has been clicked to show the class section data. If a class section is displayed and it is assigned to a room, the room is listed here.

• **Available** - This label applies to both the course and class level data. The column has two numbers separated by a slash (/). The first number is the total number of unused space in the course or class. The second number is the size limit for the course or class. For example: 5 / 25 would mean there are 5 available spaces in a class that holds 25 students.

• **Projection** - This label applies to both the course and class level data. The column lists the UniTime projected number of enrollments for a course or class.

• **Enrollment** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population then a single number which is the total number of students enrolled in the course or class is displayed. For example, if there are 20 students enrolled in a class then the number 20 would be displayed. When the search criteria used in the Filter restricts the student population for the data displayed in this column, there will be two numbers separated by a slash (/). For example, if 3 of the students in the population retrieved by the search criteria in the Filter are enrolled in the class and in total there are 20 students enrolled in the class, then the number displayed would be 3 / 20.

• **Not Enrolled** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population, then a single number equal to the total number of students who have the course listed in their course request but are not enrolled in the course, is displayed. For example, if there are 2 students who requested a course but did not receive it, then the number 2 would be displayed. When the search criteria used in the Filter restricts the student population for the data displayed in this column, there will be two numbers separated by a slash (/). For example, if 1 of the students in the population retrieved by the search criteria in the Filter requested the course but did not receive it and in total there are 2 students who requested the course but did not receive it, then the number displayed would be 1 / 2.

• **Alternative** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population then a single number which is the total number of students who have the course listed in their course request as an alternative is displayed. For example, if there are 5 students who requested a course as an alternative then the number 5 would be displayed. When the search criteria used in the Filter restricts the student population for the data displayed, this column will have two numbers separated by a slash (/). For example, if 2 of the students in the population retrieved by the search criteria in the Filter requested the course as an alternative is displayed.
alternative and in total there are 5 students who requested the course as an alternative, then the number displayed would be 2 / 5.

- **Reservation** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population, a single number equal to the total number of students who have been placed into the course or class as the result of a reservation is displayed. For example, if there were 3 students who were placed into a course as a result of a reservation then the number 3 would be displayed. When the search criteria used in the Filter does restrict the student population for the data displayed the in this column will be two numbers separated by a slash (/). For example, if 1 of the students in the population retrieved by the search criteria in the Filter was placed into a course as a result of a reservation and in total there are 3 students who were placed into a course as a result of a reservation, then the number displayed would be 1 / 3.

- **Need Consent** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population then a single number which is the total number of students who required some form of consent to enroll in the course or class is displayed. For example, if there were 4 students who required some form of consent to enroll in a course then the number 4 would be displayed. When the search criteria used in the Filter does restrict the student population for the data displayed the in this column will be two numbers separated by a slash (/). For example, if 2 of the students in the population retrieved by the search criteria in the Filter required some form of consent to enroll in a course and in total there are 4 students who required some form of consent to enroll in a course, then the number displayed would be 2 / 4.

- **Need Override** - This label applies to both the course and class level data. When the search criteria used in the Filter does not restrict the student population then a single number which is the total number of students who require an override to enroll in the course or class is displayed. For example, if there were 6 students who require an override to enroll in a course then the number 6 would be displayed. When the search criteria used in the Filter does restrict the student population for the data displayed the in this column will be two numbers separated by a slash (/). For example, if 2 of the students in the population retrieved by the search criteria in the Filter require an override to enroll in a course and in total there are 6 students who require an override to enroll in a course, then the number displayed would be 2 / 6.
Drilling Down into the Student Data in the Enrollments Tab

Depending on the permissions granted to a user by their user role, a user may be able to drill down deeper into the data displayed on the Enrollments Tab.

The Enrollments Pop-Up

When the user clicks on a course or class that is listed on the Enrollments Tab an Enrollments pop-up window listing the students retrieved by the search criteria in the Filter is displayed.  

**Note:** This pop-up may not display all students enrolled in the course or class if the search criteria in the Filter has restricted the set of students returned.

![Enrollments Pop-Up](image)

The Enrollments pop-up lists the following basic information about the students enrolled in the course or class that meet the search criteria in the Filter.

- **Student** - the name of the student
- **Priority** - the priority the student listed the course in their course request.
- **Area** - the college of the student
- **Clasf** - the classification of the student
- **Major** - the major of the student
- **Lec, Lab, Rec, Dist, etc.** - The instructional type of the section is the column label for the section the student is enrolled into. The data is the CRN-Section Id of the section the student is enrolled into.
- **Requested** - The date the student added the course to their course request.
- **Enrolled** - The date the student was enrolled into the course or class.

**Note:** The data in this pop-up can be sorted by clicking on any column label displayed.
The Classes Pop-up

From the Enrollments pop-up depending on the privileges granted in the user’s role, the user may be able to click on an individual student listed in the Enrollments pop-up and drill down to see the student’s course requests and/or schedule.

The Classes has multiple tabs and various buttons that may be displayed to a user depending on the permissions granted by their user role. The possible tabs and buttons that may be displayed are as follows:

- **Course Requests Tab** - This tab lists the student’s course requests with alternates in priority order.
- **List of Classes Tab** - This tab displays the student’s course schedule in text format as the student would see it in the Scheduling Assistant.
- **Time Grid Tab** - This tab displays the student’s course schedule in time grid format as the student would see it in the Scheduling Assistant.
- **Course Requests Button** - If the student has a student status that allows the student to use the Course Requests Page and the user’s role has the permission to view the Course Requests Page as the student, then this button will be visible to the user.
- **Scheduling Assistant Button** - If the student has a student status that allows the student to use the Scheduling Assistant Page and the user’s role has the permission to view the Scheduling Assistant Page as the student, then this button will be visible to the user.
- **Change Log Button** – FOR REG ADMIN ONLY.
- **Close** - This button closes the pop-up.
Using the Students Tab

The Students Tab provides a course centric view into the student scheduling data displayed in the Dashboard. This tab displays the data grouped by student. In addition, depending on the permissions granted to the user by their user role, it allows the user to perform actions on selected students listed in the dashboard.

The data on the Students Tab can be sorted by any column listed on the table. To do this click on the column label for the column to sort. The first click on the column sorts the table by the data in ascending order. The second click on the column sorts the table by the data in descending order. It is also possible to use the drop down menu on the “More” button to select the column to sort.
Interpreting the Data on the Students Tab

The Students Tab was designed to display a large amount of data in a compact format. The following is a description of each data column displayed on the page:

- ⊗ - This column contains a check box for each student that the user can perform an action on. Clicking the ⊗ label after students have been selected brings up a list of actions the user can perform.
- **Student** - The name of the student
- **Area** - The college of the student
- **Class** - The classification of the student
- **Major** - The major of the student
- **Accommodation** - If a student requires an accommodation that affects their course schedule, then the code for the accommodation is displayed in this column. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that requires an accommodation.
- **Status** - If the student has a student scheduling status that has been set to a value other than the session default, then the value is displayed in this column.
- **Enrollment** - The number of courses the student is enrolled into. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has at least one course request that the student is not enrolled into.
- **Not-Enrolled** - The number of courses the student has requested but is not enrolled into. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has at least one course request that the student is not enrolled into.
- **Reservation** - The number of reservations provided to a student to place the student into a particular course or class. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that required a reservation.
- **Consent** - The number of courses the student is enrolled in that required some form of consent for the student to enroll into the course. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that required consent.
- **Enrollment Credit** - This column displays the total number of credits in which a student is enrolled. If the student is enrolled into a configuration of a course that is online (DO) or hybrid (B/H) then the total credit of courses labeled online or hybrid will be broken out inside of parentheses. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that is enrolled into a course.
- **Request Credit** - This column displays the range of credits that may be generated by a student’s course request. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has saved course requests.
● **Distance Conflicts** - This column displays the number of distance conflicts a student has and next to it in parentheses the number of minutes of the longest distance conflict. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has a distance conflict.

● **Overlap [min]** - This column displays the number of minutes of overlapping classes a student has. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has overlapping classes.

● **Free Time [min]** - This column displays the number of minutes that the student is in class during a window of time the student has requested as Free Time. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has a class overlapping their Free Time request.

● **Instr. Method Preferences** - This column displays the number of instructional method preferences a student listed in their course request. If the student is not enrolled in any courses or received all of their instructional method preferences the number of instructional method preferences is displayed. If the student is enrolled in courses and is not enrolled in a class that matches their instructional method preferences, then the number displayed will be the number of instructional method preferences the student had that were met followed by a slash (/) and the number of instructional method preferences the student requested, e.g., 1 / 2. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has an instructional method preference.

● **Section Preferences** - This column displays the number of class section preferences a student listed in their course request. If the student is not enrolled in any courses or received all of their class section preferences the number of class section preferences is displayed. If the student is enrolled in courses and is not enrolled in a class that matches their class section preferences, then the number displayed will be the number of class section preferences the student had that were met followed by a slash (/) and the number of class section preferences the student requested, e.g., 0 / 1. This column is only visible if there is at least one student in the data returned by the search criteria in the filter that has a class section preference.

● **Requested** - The last date the student added a course to their course request.

● **Enrolled** - The last date the student enrolled into a course.

● **Note** - If someone has placed a note on the student, this column displays the note.
Drilling Down into the Student Data in the Students Tab

Depending on the permissions granted to a user by their user role, a user may be able to drill down deeper into the course data for a student. The user may be able to click on an individual student listed on the Students Tab and drill down to see the student’s course requests and/or schedule.

This is the same Classes Pop-up that can be reached from drilling down into the Enrollments Pop-up from the Enrollments Tab.
Using the Students Tab to Perform An Action

Set a Student's Scheduling Status

Select the checkbox in the leftmost column next to the student's name and then click the \[
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\]
icon at the top of the column of checkboxes. This will bring up a menu that lists the actions the user can take.
Set a Note on a Student

Clicking the “Set student note…” action brings up a dialog where the user can add or edit a note that is displayed in the Scheduling Dashboard for the selected students. The dialog also allows the user to set the Scheduling Status for the selected students.

The “Set student note…” dialog provides a text box for the user to enter or edit a note that will be displayed for the selected students on the Scheduling Dashboard. If the user does not select a “Status” (a Status of ‘-’) and clicks the “Set Note” button then the Note will be stored and no changes will be made to the scheduling statuses of the selected students. If the user selects the “Close” button no changes will be made.