Data Editing System for Instructional Information

USER MANUAL
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UNIVERSITY OF CALIFORNIA, DAVIS

Budget & Institutional Analysis
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SECTION 1: OVERVIEW

High quality instruction is a hallmark of the best research universities in the country, and for the University of California achieving excellence in instruction is one of its primary missions. The Davis campus commits a substantial portion of its financial and human resources each year to providing high quality instruction at both the undergraduate and graduate levels. The ability to analyze instructional activity allows institutions to monitor and assess its instructional quality. The Data Editing System for Instructional Information (DESII) is an important tool that helps the campus by providing the means for systematic collection of key instructional data. The Davis campus is well known throughout the UC system for the development and maintenance of DESII and the high quality instructional data that it provides. Much of this success can be traced directly to the outstanding work of the many DESII editors throughout the campus. The purpose of this manual is to assist you and other editors in performing this important function.

What is DESII?

DESII consists of two basic components – editing and reporting. The DESII application is accessible from your web browser and is hosted by Information and Educational Technology's (IET's) Oracle Application Server. Authorized staff members use the DESII application during the editing periods to refine data imported into DESII. There are two data sources: (1) the census which is taken on the fifteenth day of instruction each quarter from snapshot (Banner) and (2) incremental extracts from the payroll personnel system. Authorized staff members are given a four week period each quarter to edit the original imported data. **No changes can be made to the DESII data once the database is closed for editing.** However, the reports continue to be available on the Student Information System Decision Support (SIS-DS) website and are important sources of instructional information.

Why accuracy matters

When the DESII editing function has been completed each quarter, the resulting data becomes part of the Instructional Activity Information System (IAIS) which is used for a wide variety of purposes. For example, at the central campus level it is used to prepare reports on numerous aspects of instructional activity for both internal and external entities including the Office of the President and the state legislature. It is also part of several major resource allocation formulas that distribute faculty positions and funding for temporary instructors and TAs to campus colleges and divisions. DESII/IAIS is also an important management tool for academic departments and is frequently used to monitor and manage faculty instructional responsibilities. In light of the growing importance of DESII data to the campus, data accuracy and consistency are of paramount importance and the role DESII editors play in maintaining these standards is critical.

Making the data available

IAIS data are also used in a variety of instructional reports that are made available to the public and university employees via several web pages including:

- SIS Decision Support: [https://sisds.ucdavis.edu](https://sisds.ucdavis.edu) (UC Davis Faculty and Staff)
**Maintenance of database**

Each subject (e.g. “Italian”) must have an editor. Typically, the department will designate a staff member to serve as editor but in some cases, the editor is assigned by the graduate group that administers the curriculum. There may be more than one editor assigned to a subject; for example, a subject may have one editor to edit undergraduate courses and another to edit graduate courses.

**DESII application system requirements**

The DESII application is accessible from your web browser and is hosted by Information and Educational Technology's (IET's) Oracle Application Server and may be launched from the DESII homepage. Instructions can be found in Section 2: DESII login process of this manual.

Additional information on software requirements for DESII key-entry can be found at the DESII homepage at [http://budget.ucdavis.edu/desii](http://budget.ucdavis.edu/desii).

**Access to DESII application (for DESII edits)**

To access the DESII application through the web, you need two passwords. First, you need your Kerberos password to access the application web page. Second, a DESII user name and password are needed to run the DESII application.

To apply for a DESII user name and password, download the DESII Access Request Form from the DESII homepage at [http://budget.ucdavis.edu/desii](http://budget.ucdavis.edu/desii) under Userids and Passwords and follow the instructions provided on the form. Send the completed form to the contact person indicated on the form.

When the DESII support administrator receives the access request form, you will be contacted and arrangements will be made to train you on DESII. Access will be granted once all the necessary steps are completed.

**Access to SIS-DS website (for DESII reports)**

Access to DESII Instructor Activity and Course Activity reports are available at SIS Decision Support (SIS-DS) web site). SIS DS is available to all current UC Davis Faculty and Staff.

A link to SIS website is located is available at the DESII homepage [http://budget.ucdavis.edu/desii](http://budget.ucdavis.edu/desii).

Reports 423 (DESII Course Edit Worksheet) and 425 (DESII Instructional Activity Edit Worksheet) contain preliminary information about course sections and is used during an open editing term to assist you with the editing process. Information should be used for DESII editing only. It should be considered unverified and is subject to change by ORMP staff after completion by departmental DESII editors. These reports are restricted to DESII editors for the purpose of DESII editing.

Once finalized, course reports (SIS DS 424 - Course Activity Report) and instructor teaching reports (SIS DS 421 - Instructor Activity Reports) will be made available to all current UC Davis Faculty and Staff.
DESII support

DESII homepage:  http://budget.ucdavis.edu/desii

DESII e-mail:  desii@ucdavis.edu

Office location:  Budget & Institutional Analysis
376 Mrak Hall

DESII support staff:  Teresa Strausser
tstrausser@ucdavis.edu
(530) 752-2463  Fax: (530) 752-5808

Because of the importance of the data, consistent application of instructional policy and DESII editing rules across campus departments is essential. Therefore, as an editor, you must have a thorough understanding of the DESII business rules and definitions before you begin editing. It is also helpful for you to have an understanding of campus instructional policies. This manual, the DESII website, and the DESII support staff are available to assist you.

DESII manual formatting conventions

To make this manual easier to use a number of conventions appear throughout. These conventions are detailed in the table below.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BOLD, SMALL CAPS</strong></td>
<td>Section title</td>
</tr>
<tr>
<td>Bold</td>
<td>Topic title</td>
</tr>
<tr>
<td>UPPERCASE</td>
<td>A screen/window name</td>
</tr>
<tr>
<td><strong>Bold, and green</strong></td>
<td>A field name</td>
</tr>
<tr>
<td><strong>Bold, blue</strong></td>
<td>A button name</td>
</tr>
<tr>
<td><strong>Bold, purple</strong></td>
<td>Step title</td>
</tr>
<tr>
<td>Underline</td>
<td>Keyboard</td>
</tr>
<tr>
<td>Red</td>
<td>Important note</td>
</tr>
</tbody>
</table>

- Description
- Steps
- Guidelines
SECTION 2: DESII LOGIN PROCESS

DESII Access

To access the DESII application through the web, you need two passwords. First, you need your Kerberos password to access the application web page. Second, a DESII user name and password are needed to run the DESII application. See page 6 of this manual for more information about access to the DESII application.

Login process

Step 1 of 3 – Launch Application

(a) Open a supported web browser and go to the DESII homepage at http://budget.ucdavis.edu/desii.

Bookmark this page to reach the web application in the future.

(b) Click Launch Application and the login will begin.

An up-to-date link to launch the application is maintained in the Quick Links section to the left side of this page.
Step 2 of 3 – UCD Secure Login screen

(a) In the **LoginID** field, enter your UCD LoginID (all in lowercase).

(b) In the **Password** field, enter your Kerberos password.

(c) Click the **Login** button.

Step 3 of 3 – DESII Login Screen

Note: DESII defaults to all caps.

(a) In the **User Name** field, enter your DESII user name.

(b) In the **Password** field, enter your DESII password.

(c) Select the **Connect** button.

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Editors must understand the policies and procedures that govern recording and reporting of DESII data and the importance of maintaining and using the DESII data in a responsible manner. Access privileges will be revoked if the user violates DESII policies and procedures or if the user compromises system security. Editors and analysts must enter and/or use data in a manner that is consistent with policies, procedures, and definitions maintained by the UC Davis Policy and Procedure Manual section 320-20 and must agree to the use of their own personal data in accordance with UC Davis Web Page Privacy Policy section 310-70.

Editors must maintain the security of DESII by keeping their user identification and password confidential and must not disclose personal or confidential information.
concerning individuals to unauthorized persons or entities as specified by personnel policy, collective bargaining agreements, or state and federal law.

Editors receive their DESII user name and DESII password as part of their initial training. The DESII password is different from your MyUCDavis and SIS-DS passwords that use your Kerberos password. DESII Login passwords do not contain any special characters and are not case sensitive (DESII also defaults to all caps). If you have forgotten your password and need to have it reset, please e-mail desii@ucdavis.edu.

**Security warning during login**

The first time you access DESII, you may get the following security warning. These are security warning messages to confirm that you are about to establish a connection to this particular server. Clicking the **Continue** and **Run** button or clicking the **Trust** button in on a Macintosh. Selecting the “Do not show this again for apps from the publisher and location above” box will stop the message from reappearing at future logins.
SECTION 3: MAIN MENU

Once you are logged in, the main menu appears. You will be greeted with the DESII News. DESII news is used by the DESII support administrator to communicate DESII information. Please read DESII news, as it may contain important information regarding editing. Though the content does not change daily, it is important to check the news every time you log in.

From this screen, you may select from two options:

1. Course Edit Screen (page 15)
2. Exit DESII
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SECTION 4: EDITING PROCESS

This section contains instructions for the editing process. A flow chart of the entire process is presented below and can be used as a quick reference guide.

Step-by-Step DESII Editing Process Chart

STEP I – DESII Course Edit Worksheet
Print DESII Course Edit Worksheet (Report 423) from the SIS-DS webpage and verify data on report. (page 14 and 39)

STEP II – Course Look Up
In the COURSE LOOKUP SCREEN of the DESII application, select the course you wish to edit. (page 15) This will take you to the COURSE EDIT SCREEN. (page 15)

STEP III – Course Edit Screen

A. COURSE SECTION INFORMATION BLOCK
Verify classroom information and number of weeks. (page 18)

B. FACILITY BLOCK
Edit facility information: building, room, meeting days and times as appropriate. (page 19)
If the Facility/Time Conflict dialog box appears, you will have to determine if you have a valid conflict. (page 24)
If the conflict is valid, report the conflict by selecting Valid Conflict button in the Facility/Time Conflict dialog box. If the conflict is a mistake, select Cancel. (page 21)

C. COURSE SECTION INFORMATION BLOCK
Verify if the Weekly Student Hrs field is correct. (page 26)
If incorrect, select the Stdt Hr Override field so that a “✓” appears and edit the Weekly Student Hrs field as appropriate. (page 26)

D. INSTRUCTOR BLOCK
Edit instructor information: name, contact hours and role. (page 27)
Or
If instructor does not have UCD appointment, select the No UCD Appt field so that a “✓” appears. (page 27)

F. MISCELLANEOUS BLOCK
Click the Save button (page 36)
If this is not the last record to be edited, go to next record and begin again with step A.
If you add a non-credit section (NCS), go to that record and begin with step A. (page 37)
If you are done with your edits click the Exit button (page 36)
I. First Step – Course DESII Course Edit Worksheet

An important first step in the editing process is to print out the DESII Course Edit Worksheet from the SIS-DS (Report 423) for the courses you edit. Make your edits by hand on paper before making any changes in DESII. Please check for incorrect or missing instructor and/or teaching assistant names, meeting days and times, and meeting location. In addition, please check for any non-credit (secondary) sections that are missing or were cancelled. After you have marked up your hard copy, you can begin to look up the courses you need to edit in the COURSE LOOKUP screen and edit them in the COURSE EDIT SCREEN.

Printing DESII Course Edit Worksheet (Report 423) from SIS-DS
(See page 39 and 41 for instructions.)

After you have made all of your edits in DESII, print another copy of your Course Editing Worksheet report and proof our changes. This approach will help you proofread your edits and give you a record of the changes you made.
II. Second Step – Course Lookup Screen

If you select the **Course Edit Screen** button from the main menu of the DESII application, the COURSE LOOKUP screen appears. This screen allows you to access the database that is open for editing. The course lookup displays courses that were extracted from the student system during the initial database load.

You can produce two types of search results in Selection Result, all courses associated with a particular subject code or one specific course.

**Using the Course Lookup Screen**

![Course Lookup Screen]

**Step 1 of 5** – In the **Open for Editing** field, select current editing period from the pull down menu.

**Step 2 of 5** – Under Selection Criteria -

For a list of all courses
Enter three letter subject code in **Subject** field.

For one specific course
Enter three letter subject code in **Subject** field and three digit course number (may include a one or two character alphabetic suffix) in the **Crs #** field.

**Step 3 of 5** – Click the **Find** button.
Step 4 of 5 – Result(s) will appear in Selection Result. Click to highlight desired course.

Step 5 of 5 – Click the Edit/View button to edit/view the course in the COURSE EDIT SCREEN.

Click the Clear button to clear fields in the COURSE LOOKUP screen.

Click the Exit button to return to the main menu.

If you do not know the three-letter abbreviation subject code, you can double click in the Subject field to bring up a list of valid subjects codes. (See appendix 1.)
III. Third Step – Course Edit Screen

In the COURSE EDIT SCREEN, you can view and edit the course information (imported from the Banner system) as appropriate. The amount of information displayed will depend on what was available in Banner at the time of import (e.g., the instructor name may or may not be filled in depending on whether or not that information was in Banner at the time of import).

The information in COURSE EDIT SCREEN is grouped into four different blocks:

1. Course section information
2. Facility
3. Instructor
4. Miscellaneous

Some of the data elements in DESII represent official data from the systems of record; these data may not be altered. Examples of uneditable data elements include student credit hours, primary class enrollments, and employee appointments. For other data elements, DESII is the system of record and departments are responsible for supplying and correcting the data. For example, department editors are allowed to add instructors/teaching assistants to a class, change instructor roles, and edit meeting locations and times.
A. Course section information block

The course section information block identifies the section of the course you wish to view or edit. It contains class information, weekly student hours, weeks, student hour override and the checked by editor indicator. In this step, you will be editing class information and number of weeks.

Editing classroom information and number of weeks

Step 1 of 3 – Verify class information (academic year, term, subject code, course number, course title, section #, class type, enrollment, student credit hours). Contact DESII support team if you think any of the values in these fields are incorrect.

Step 2 of 3 – Verify number of weeks in the Weeks field. Modify if appropriate.

Step 3 of 3 – The remaining fields in this block cannot be edited until the other sections are completed. You will edit the remaining fields in steps C and E. The next step is to edit the facility block.

The Weeks field captures the number of weeks that defines the length of a course in the term you are editing.

The Weeks field defaults to:

10 weeks for the quarter terms
15 weeks for the semester terms (Law School)
6 weeks for summer terms

You should pay special attention to the Weeks field for the following summer terms: Special Summer Sessions, the Summer Quarter, and Extra Session. Courses in these terms are offered from June through September and the number of weeks varies depending on the length of the program.
B. Facility block

The facility block contains the facility and scheduling information for that section. In this block, you can add, change, or remove facility and scheduling information.

The facility fields may or may not contain data when you begin your edits. Facility data will only be imported into DESII if all of the following fields (Building, Room, Day, Begin Time and End Time) are available in Banner at the time of import.

Removing facility data

Step 1 of 2 – In the facility block of the COURSE EDIT SCREEN highlight the row you wish to delete.

Step 2 of 2 – Click the Rem button to delete record.

Adding or changing facility data

Step 1 of 7 – Select one of the following options:

To add a new facility location/time - click the Add button located in the facility block within the COURSE EDIT SCREEN. When you select this button, the FACILITIES EDIT screen appears. (Continue with steps 2-7, adding new data as appropriate.)
To modify existing data - highlight the row you wish to modify, and then click the **Change** button located in the facility block within the COURSE EDIT SCREEN. When you select this button, the FACILITIES EDIT screen appears. (Continue with steps 2-7, modifying existing data as appropriate.)

![Facilities Edit Screen](image)

**Step 2 of 7** – Enter the building code in the **Building** field.

**Step 3 of 7** – Enter the four digit room code in the **Room** field.

**Step 4 of 7** – Select the day(s) the class is held by clicking a check on or off in the appropriate days in **S, M, T, W, T, F, S** fields.

**Step 5 of 7** – Select the **Begin Time** from the pull down menu.

**Step 6 of 7** – Select the **End Time** from the pull down menu.

**Step 7 of 7** – Once you have entered in all of the appropriate information, click the **OK** button. If you do not get a “Facility/Time Conflict” message, continue to the next step of the editing process, verifying weekly student hours (see page 26). Otherwise, see section titled “Facility/Time Conflict” on next page for instructions on handing facility/time conflicts.

Click the **Cancel** button to cancel your entry and return to the COURSE EDIT SCREEN.

If a class meets regularly in a general assignment classroom or class laboratory the exact location and time should be entered. Meeting times should only be recorded for classes that are scheduled regularly each week. However, meeting times should not be reported if meetings are irregular; instructor contact time can be recorded on a weekly average basis without recording a meeting time. Occasionally, there may be a location that is not available in DESII. You can use the following generic building names when appropriate.

**FACOFC** = Faculty Office   **NOFAC** = No Facilities   **OFFCAM** = Off Campus

If you do not know building codes or room codes you can double click in the appropriate field (**Building** or **Room**) to bring up a list of valid building and rooms. (See appendix 2 and 3.)
Facility/Time Conflict

This section describes how to handle facility/time conflicts in DESII. If you make changes to a section of a course and it conflicts with another section of another course in the database, a message similar to the following will appear.

You may be getting this message because you have a course that is concurrent or cross-listed or you may have made an error. Concurrent or cross-listed courses share the same classroom and scheduled time and are considered valid conflicts.

Handling Facilities Conflict

Step 1 of 2 – Identifying the reason for a conflict

(a) If you made a mistake, click the Cancel button. When you click the Cancel button, the data you entered in the facility fields will disappear and you can re-enter the correct data.

If you believe that your data entry is correct, contact the DESII editor in the other department to resolve the conflict. (Note: If you are unable to reach the other editor
immediately, select the Cancel button and return to edit this record when you have the necessary information.

(i) If the mistake was made by the other editor, the erroneous entry must be removed by the editor in the other department before you can enter the data for your section. Once you are able to enter your data, you can continue with the next step of the editing process, which is verifying weekly student hours. (See page 26.)

(ii) If you discover that you have a valid conflict as defined in this manual (see page 24), you will select the Valid Conflict button.

Step 2 of 2 – Selecting the Valid Conflict button

(a) Click the Valid Conflict button to report a facility conflict that is not an error.

(b) You will receive a VALID CONFLICT – TRANSACTION NUMBER message. Remember to write down the transaction number before you click the OK button so you will be able to identify this event in the future.
(c) When you click the **OK** button the data entered in the facility fields will disappear from the COURSE EDIT SCREEN and the data you entered in the facility fields will be electronically sent to the DESII support team for processing.

(d) Because the facility information has not been saved, you will not be able to edit the weekly student hours or instructor contact hours until your submission has been approved. Upon approval by the DESII support team, the data you submitted will re-appear in the COURSE EDIT SCREEN for the affected sections of the course.

(e) You will receive a confirmation e-mail once your valid conflict has been approved as either a concurrency or a cross-listed course. At this point, return to that record to verify the data and continue with the rest of the steps of the editing process (verifying the weekly student hours, instructors, contact hours and roles, and marking the **Checked by Editor** field).
Valid facility conflicts will be accepted in cases where the courses are concurrent or cross-listed. Examples of conflicts that are considered valid are:

1. Courses which should be recorded as being cross-listed (as indicated in the course approval form).
2. Two different classes share the same classroom.
3. Two sections of the same course with different instructors share the same classroom or their scheduled time overlaps.
4. A student needs to take one part of a combination course (either the lecture or non-credit bearing section). The student attends the regular class sessions but is enrolled in a variable unit course.

The DESII Team will be responsible for cross-listing all classes; the team will work from information submitted through the “valid conflict” function and official course descriptions.

Building and scheduled days and times with a concurrency will have a (check mark) behind it. Concurrencies may be viewed in the CONCURRENT CLASSES screen by highlighting the row with the check mark behind it and clicking the View Concurrences button in the facility block in the COURSE EDIT SCREEN.
Cross-listings may be viewed in the miscellaneous block of the COURSE EDIT SCREEN.

**Important:** If you are submitting a “valid conflict” during the last few days of DESII editing, please send an e-mail to desii@ucdavis.edu with the transaction number. This will ensure prompt approval and sufficient time to complete the edits for that section before the database closes.

Questions and concerns regarding facilities conflicts can be sent to the DESII support team at desii@ucdavis.edu.
C. Course section information block

The **Weekly Student Hrs** field represents the number of hours per week each student spends in a formal classroom meeting. The weekly student hour is calculated by the system based on scheduled days and hours in the facility block.

![Course Edit Screen](image)

**Editing weekly student hours**

**Step 1 of 2** – Verify the **Weekly Student Hrs** field. If the hours are correct you do not need to continue to step 2, and you may begin your edits in the instructor block (see page 27).

**Step 2 of 2** – If you need to change the hours in **Weekly Student Hrs** field, you must check “✓” the **Stdt Hr Override** field. This allows you to override the automatic calculation generated by the system. You can then enter the correct weekly student hours.

You can only use **Stdt Hr Override** field to modify the **Weekly Student Hrs** field under the following three circumstances:

1. If class is unscheduled – Instructors may meet at different times each week with their independent study students. Because you do not enter the days and hours when a class is unscheduled, the system calculates the weekly student hours as “zero”. (See page 32.)

2. If a class meets in two rooms at the same time – The class uses more than one facility at the same time. In this case, the system will calculate weekly student hours higher than it should.

3. If student hours per week are less than scheduled days and hours – An instructor may have a lab where the amount of time the students are required to spend in the lab is less than the time (scheduled days and hours) the lab room is available to the students. Again, the number of hours in the **Weekly Student Hours** field calculated by the system is too high.
D. Instructor block

The instructor block contains information on UCD and UCDMC employees who teach the sections you are reviewing, including their pay department, appointment, credit percentage, contact hours and role. In this block, you can add, change, or remove instructor data.

Removing instructor data

Step 1 of 2 – In the instructor block of the COURSE EDIT SCREEN, highlight the row you wish to delete.

Step 2 of 2 – Click the Rem button to delete record.

Adding or changing instructor data

Step 1 of 3 – Add or Change (or No UCD Appt)

Select one of the following options:

- To add a new instructor – Click the Add button located in the instructor block within the COURSE EDIT SCREEN. When you select this button, the INSTRUCTOR SELECTION LIST screen appears (go to step 2).

- To modify an instructor’s record – Highlight your selection and click the Change button located in the instructor block within the COURSE EDIT SCREEN. When you select this button, the INSTRUCTOR EDIT screen appears (go to step 3).

- No UCD Appt – select this box if the primary instructor does not have a UCD appointment. You are now done with the instructor block and should continue to Step E on page 36.
Step 2 of 3 – Search for Instructor in database using Instructor Selection List Screen

(a) Enter the instructor last name and first (all or part of the name) in the Last name and First name fields in Selection Criteria.

(b) Click the Find button to display all matching records from the payroll and scroll until you find the person you are looking for.

(c) To highlight the instructor’s name click on the appropriate row and click the Exit with Value button and the name will appear in the INSTRUCTOR EDIT screen.

Click the Cancel button to cancel the search and return to the COURSE EDIT SCREEN.
Step 3 of 3 – Instructor Edit Screen

In the INSTRUCTOR EDIT screen:

(a) Enter instructor contact hours in the **Contact Hrs** field. (See page 32.)

(b) In the **Role** field, select the appropriate role for the instructor from the pull down menu. (See page 34.)

(c) Click **OK** button. The new instructor, along with the contact hours and role, will appear in the instructor block of the COURSE EDIT SCREEN.

Click the **Cancel** button to cancel your entry and return to the COURSE EDIT SCREEN.
View Appointments

To view an instructor’s pay department(s) in the INSTRUCTOR APPOINTMENTS screen, highlight the instructor’s name and then click the View Appointments button. Instructors with multiple pay departments will have the Add’l field marked.

Important: When adding new instructors, it is possible that you may inadvertently select the wrong instructor (e.g. instructors with same or similar names). This feature can help you to verify that you have selected the correct person.

Instructor Responsibility (crdt %)

This field indicates how the student credit hours associated with the course will be allocated to some or all of the instructors associated with it. Instructor responsibility is calculated by the system and the allocations sum to 100%. Only “Primary” and “Primary-No Grade Sheet Authority” roles receive a percentage of responsibility for the course. Instructors teaching in other roles do not receive a percentage of responsibility for the course. No student credit hours are allocated to their pay departments. The contact time recorded for their participation in the course, however, does accrue to their pay departments and is displayed on their individual teaching records.
View Crs Sections

To view an instructor's course sections(s) in the INSTRUCTOR COURSES SECTIONS screen, highlight the instructor's name and then click the View Crs Sections button. All the course sections where the instructor is being reported in for the selected term will be listed here.
Contact hours for scheduled sections

The contact hours represent the average number of hours per week that each instructor spends in the classroom. An individual instructor’s hours cannot exceed the weekly scheduled hours for the course.

The following explains how this general rule is applied under various circumstances:

• Team Teaching - Record contact hours for instructors who are team teaching in the same manner. Their combined time may sum to more than the weekly scheduled hours for the course if they are actively teaching together some or all of the time.

• Non-credit sections – If a course has more than one activity or part (such as a lecture and a laboratory), it will have a credit bearing section (primary section) and non-credit section(s).

If the primary section instructor does not attend any of the non-credit bearing sections, do not report the instructor in the non-credit bearing sections. This generally occurs when a TA is in charge of a non-credit bearing section.

If the primary section instructor is actively teaching in the non-credit bearing sections, record his/her contact hours, as either:

   Partial participation – If the instructor attends sections on a rotating or occasional basis total all contact time for the quarter and allocate it among the sections. The time should be expressed on a weekly average basis.

   Full participation – If the instructor is actively teaching in every non-credit bearing section meeting throughout the quarter, record contact time equal to the weekly scheduled hours for each section.

• Supervisory – No contact time can be recorded for instructors with a supervisory role, since they do not have instructional contact with students enrolled in the course.

Contact hours for unscheduled sections

Record instructors’ contact time for unscheduled sections, including 99, 199, and 299 classes. Report the contact time that is spent actively engaged with students in discussing the course material. Departmental policies should govern contact time reporting for activities that involve intermittent instructional contact, such as work in a laboratory environment.

This time will be reported separately from time reported for scheduled sections.
Contact hours for field trips

Contact time for field trips should include only the time spent actively teaching. It may include travel time if the instructor uses that time to discuss course content. Contact time for field trips to be taken later in the quarter may be estimated based on previous experience in order to meet DESII editing deadlines.

Contact hours for independent study courses

All departments are required to collect and enter the weekly student contact hours and weekly instructor contact hours for independent study courses. The policy reads:

Weekly student and instructor contact hours is the amount of time a student and an instructor spend together in one week, engaged in instructional activity such as discussing class projects, a thesis, or research.

A student may spend many hours working independently in a laboratory, office, or study hall. Remember, we are only interested in the time the instructor and student spend together each week actively engaged in some aspect of the curriculum.

If an instructor has more than one student enrolled in an independent study class and meets individually with each student, the instructor's contact hours per week in DESII will be greater than the students' weekly hours.

Some departments require students enrolled in 299 sections to also enroll in a 290C course. That is where you will collect the weekly student contact hours and weekly instructor contact hours for your 299 students. The same contact hours should not be entered in the 299 section.
Instructor Role Categories

An instructor’s role should reflect the instructor’s teaching activity in the class. There are six instructor role types in DESII:

Primary
- The instructor is in charge of the section and actively participates in teaching it.
- The instructor can be any teaching rank other than a teaching assistant (TA).
- More than one instructor may share primary responsibility for a class.
- An instructor can have a primary role in both credit bearing and non-credit bearing sections.

Secondary
An instructor with a secondary role assists a primary instructor. This role is used primarily in three situations:
- An instructor of any rank is actively assisting the primary instructor in a credit bearing section. This usually occurs when the primary instructor has a ladder rank faculty member assist him in teaching but does not share primary responsibility for the course.
- An instructor of any rank is assisting the primary instructor in a non-credit bearing section.
- A TA has sole responsibility for teaching a non-credit bearing section.

Support
- A support role is given to a TA who does not teach a class but assists the primary instructor with grading exams, reading papers, holding office hours, and setting up labs.
- A TA in this role will not receive any contact hours; if a TA is already listed as teaching a secondary section (the non-credit bearing section of the course), you do not need to add him or her to the credit bearing section in the support role.
- The support role is only allowed in credit bearing sections.

Primary-no-grade-sheet-authority (PNG)
- This role is given to a TA/associate who is the only instructor with teaching responsibility in a credit bearing section. Generally, this role is limited to composition and language instruction classes.
- It is at the discretion of the department to assign a primary or PNG role to associates.
- The PNG role is only allowed in credit bearing sections.
- Must always be accompanied by a Supervisory role.

Supervisory
- The instructor in this role has grade-sheet authority for a credit bearing section that is taught directly by a TA/associate. A TA/associate should be given the PNG role for this type of section.
- The supervisory role is only allowed in credit bearing sections.
- Must always be accompanied by a PNG role.

Guest
- The instructor gives one or more guest lectures in the course. Only UCD/UCDMC employees can be guest lecturers.
Summary of ranks and roles table

The table below summarizes the ranks that can be associated with each role type. These rules are governed by University wide policies and UC Davis policies and procedures regarding academic appointees and Committee on Courses of Instruction Policies and Procedures.

We recently reevaluated our policy in the DESII to make sure we were in compliance with University policies and procedures in regards to instruction. Please note the following changes to DESII policy:

1. You are no longer allowed to assign primary or primary-no-grade roles to Assoin, and primary-no-grade roles to TAs in graduate level courses or course sections.
2. You are no longer allowed to assign Assoin supervisory roles in graduate level courses or course sections.
3. You are no longer allowed to assign primary or primary-no-grade roles to TAs in course levels 100-199. You may assign primary or primary-no-grade roles to Assoin in course levels 100-199, if they are approved by the Committee on Courses of Instruction to conduct instruction in upper division courses or course sections. It is the department’s responsibility to ensure they have proper approval on file.
4. In cases where there may be exceptions to these rules, you may send an e-mail to desii@ucdavis.edu with the information you wish to enter. If appropriate, we will enter the information into DESII on your behalf.

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<thead>
<tr>
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<th>Credit</th>
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<th>Credit</th>
<th>Non Credit</th>
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</table>

For TAs, role assignments may differ in credit bearing vs. non-credit bearing sections. For example, a TA in charge of a credit-bearing section would be assigned a primary-no-grade role, but a TA in charge of a non-credit section would be assigned a secondary role.
E. Course Section Information block revisited

The **Checked by Editor** field is located in the upper right hand corner of the course section information block. A check mark in this field indicates that you have reviewed all data and that the edits for that section are complete. This allows you and the DESII support team to monitor which courses have been edited.

A section may already be “checked by editor” when you open it. This means that it is a crosslisted course that either you or another department editor has already verified. If there is a discrepancy in the data, please contact that department editor.

**Selecting Check by Editor**

**Step 1 of 2** – Review all data in the section you are editing and check for accuracy.

**Step 2 of 2** – Check “✓” the **Checked by Editor** field once you are certain that all of the information in the COURSE EDIT SCREEN is correct.

Please do not check “✓” the **Checked by Editor** field until you have competed your review/edit for that section. Do not select this field for edits that are pending. For example, if you are waiting for approval on a “valid conflict” request (see page 21).

F. Miscellaneous block

The miscellaneous block consists of reference information such as courses that are cross-listed with the course you are currently editing, unique section identifiers and record number(s). It also contains buttons that allow you to delete and/or add non-credit bearing sections, navigate through records, save and exit.

**Saving Edits**

**Step 1 of 1** – Click the **Save** button. If this is not the last record to be edited, navigate to next record and begin again with step A on page 18.

**Exiting Course Edit Screen**

**Step 1 of 1** – If you are done, click the **Exit** button. You will return to the COURSE LOOKUP screen.
Adding Non Credit Section

Step 1 of 4 – In the COURSE EDIT SCREEN, navigate to the credit bearing section to which you would like to add a non-credit section. Click the Add NCS button.

Step 2 of 4 – The ADD NON CREDIT SECTION screen will appear.

Step 3 of 4 – Enter the requested information: section number, class type, enrollment and weeks. The weeks will default to 10 but can be changed by the editor.

Step 4 of 4 – Click the Save button and you will return to the COURSE EDIT SCREEN in the newly created non-credit bearing section. This section is now ready for editing.

Click the Cancel button to cancel your entry and return to the COURSE EDIT SCREEN.

Deleting Non Credit Section

Step 1 of 2 – Using the navigation tabs at the bottom of the COURSE EDIT SCREEN, scroll to the non-credit section (record) you want to delete.

Step 2 of 2 – Click the Delete NCS button to delete that non-credit section.

You cannot add or delete credit-bearing sections. You may add non-credit bearing sections to a credit bearing course in the following situations:

- **Over Enrollment/Expanded Curriculum**
  Additional secondary sections of at least three weeks duration that were added to accommodate over enrollment or additional materials that were not reflected in the registrar's system at the fifteenth day census.

- **Field Trips**
  The number of weeks and contact time for field trips should be recorded appropriately. For example, a one-day field trip might be recorded as a one week section with eight contact hours.

- Do not add special sections that are scheduled for review for exams or office hours.

You may delete a non-credit bearing section of a credit bearing course.

For example, if a non-credit bearing section is canceled as a result of an instructor not being able to teach, your department may cancel that section and move the affected students to another non-credit bearing section. As a result, you will need to delete the canceled non-credit bearing section in DESII and you will need to contact the DESII support team to adjust the enrollment of the section to which the students have been moved.
SECTION 5: DESII REPORTS ON SIS-DS

DESII reports

This section contains instructions on the login process to the SIS Decision Support web site (SIS-DS) and printing instructions for the SIS-DS DESII reports 421, 423 and 424 at https://sisds.ucdavis.edu/. DESII reports are designed to assist you in your editing efforts and to provide an official record of teaching activity for faculty merit and promotion packages. Department staff and faculty may also use the reports to analyze and plan curricula and to review workload.

421 – Instructor Teaching Activity Report
423 – DESII Editing Report (Preliminary data used in the DESII editing process)
424 – Course Activity Report (Official data published after editing has been finalized)

SIS-DS Login

Step 1 of 2 – Go to SIS-DS Webpage

(a) From the DESII homepage at http://budget.ucdavis.edu/desii, click SIS-DS Reports and this will take you to the Student Information System Decision Support (SID-DS) webpage. An up-to-date link to the SIS-DS website is maintained in the Quick Links section to the left side of the DESII homepage.
Step 2 of 2 – Log In with UCD Login ID

(a) Click **Login** on screen below.

(b) Press **Log In with UCD Login ID** button on screen below. You will be presented with a form that will ask for your UCD Login ID and Kerberos password.
In the **User name** field, enter your UCD LoginID (all in lowercase).

In the **Password** field, enter your Kerberos password.

Click the **OK** button. This will take you to the report menu.

---

**How to process report 423 – DESII Course Edit Worksheet**

**Step 1 of 2 – Navigate to report 423 – DESII Course Edit Worksheet**

(a) From Report Menu, select **DESII Editing Reports** or you can type **423** in the **Jump to Report** field and go directly to step 2 (a) on the next page.
(b) From DESII Editing Reports Menu, select DESII Course Edit Worksheet (423).

Step 2 of 2 – Set report parameters.

(a) In the DESII Academic Term Code field, select an open term (the term in which your courses are being offered).
(b) In the **DESII Academic Subject** field, enter a valid academic subject code in current term in DESII database.

(c) Select desired display format as **Browser** or **PDF file**.

(d) Click the **Process** button.

After you have made all of your edits in DESII, print another copy of your Course Activity Report and proof your changes. This approach will help you proofread your edits and give you a record of the changes you made.

Clicking blue field name **DESII Academic Subject Code** will result in a list of academic subjects available in current terms in DESII database from which you can select from.

Clicking blue field name **DESII Course Number** will result in a list of course numbers based on a direct access to live DESII data from which you can select from. Leaving this field blank will generate a report with all the courses under that subject code and academic year. If you would like to generate a report with specific course numbers, you can use “list” your desired course numbers by clicking **List**.
How to process report 424 – Course Activity Report

Step 1 of 7 – Navigate to report 424 – Course Activity Report

(a) From Report Menu, select Course Reports or you can type 424 in the Jump to Report field and go directly to step 2 on next page.

(b) From Course Reports menu, select Course Activity Report (424).
Step 2 of 7 – Enter Academic Year Code(s)

Enter Academic Year Code(s) or click the blue field name Academic Year Code(s) to get to the ACADEMIC TERM LOOKUP window.

In the ACADEMIC TERM LOOKUP window:
1. Select applicable year(s).
2. Press the Go button.
3. Use the check boxes to select/unselect any Term(s).
4. Press the Return Value(s) button.
Step 3 of 7 – Enter subject code

Enter subject code or click the blue field name **Academic Subject Code** to get to the ACADEMIC SUBJECT CODE LOOKUP window.

In the ACADEMIC SUBJECT CODE LOOKUP window:
1. Select applicable year.
2. Press the **Go** button.
3. Select the Subject by clicking on the Subject Code.
Step 4 of 7 – Enter course number(s)

Enter course number(s) or click the blue field name Course Number to get to the ACADEMIC COURSE CODE LOOKUP window.

In the ACADEMIC COURSE CODE LOOKUP window:

1. Check Course Codes to select/unselect.
2. Press the Return Value(s) button.

Note: Course Number is an optional field, and dependent on the type of search you wish to process. If left blank, you will get all the courses that match your Academic Term Code(s) and Academic Subject Code criteria.

Step 5 of 7 – Select PDF file or Browser for Display Format.
Step 6 of 7 – Select **Process** button.

![Image of Course Activity Report](https://example.com/course_activity_report.png)

Step 7 of 7 – Select **View, Print and/or Save the Course Activity Report(s).**

The output below is a sample of the browser format.

![Image of Report Parameters](https://example.com/report_parameters.png)
How to process report 421 – Instructor Teaching Activity Report

Step 1 of 5 – Navigate to report 421 – Instructor Reports

(a) Select **Instructor Reports** from Report Menu or you can type **421** in the **Jump to Report** field and go directly to step 2.

(b) Select Instructor Teaching Activity Report (421).
Step 2 of 5 – Set report parameters

Set report parameters: Academic Year Code(s), Academic Rank(s) and Instructor ID. (See appendix 4 for instructions on how to set report parameters)

Step 3 of 5 – Select the display format as PDF (or Browser).

Step 4 of 5 – Press Process button

Step 5 of 5 – Select View, Print and/or Save the Course Activity Report(s).
The output below is a sample a PDF format.

Instructor Teaching Activity Reports
The Instructor Teaching Activity Reports are in portrait view instead of landscape view and can be saved as an electronic PDF file. Also, print jobs are no longer only limited to printers with drivers that Citrix/DESII only recognizes, but instead can be sent to any printer your system is mapped to.

Archives
You can generate current and historical (to 1995-96 academic year) Instructor Activity and Course Activity Reports. Reports prior to 1995-96 are available in hard copy. Your department should have copies of those instructional reports. If not, you may send a request to desii@ucdavis.edu.
These are two types of DESII reports available to you at the SID-DS website:

- **Course Activity Reports**
  - SID DS 423 – Preliminary course data used in the DESII editing process, listed by subject. Information should be used for DESII editing only. It should be considered unaudited and is subject to change by ORMP staff after completion by departmental DESII editors. This report contains information on courses that are edited through DESII. It is highly recommended that you make your edits on a hardcopy of the course activity report and use this copy to guide your on-line edits.
  - SIS DS 424 – Official data published after editing has been finalized. Available all current UC Davis Faculty and Staff.

- **Instructor Activity Reports** (Single individual or by department/rank)
  - SIS DS 421 – For official finalized Instructor Activity Reports, use report 421. DESII allows you to produce instructor activity reports using two primary types of search methods, one by specific instructor(s) IDs and the other by department and rank. The difference between the two selections is that one generates a report for a specific instructor(s) and the other allows you to generate reports for a group of like faculty members (e.g. all full professors) without entering each instructor ID separately.
SECTION 6: GLOSSARY

Academic Year  The academic year in which the course that is being edited is offered.

Add’l  A check in this field means this instructor has more than one appointment. To view other appointments, click the “View Appointment” button. DESII Screen(s): Course Edit Screen.

Begin/End Time  The beginning and ending times of a regularly scheduled class. Class hours may be left blank only if unscheduled (does not meet on a scheduled basis). DESII Screen(s): Course Edit Screen and Facility Edit.

Building  The name of a building in which class is being offered. For class meeting locations that take place in a faculty office, off campus or no facility, generic designations may be selected from the room list. DESII Screen(s): Course Edit Screen and Facility Edit.

Census date  This is the official census date for the campus. For fall, winter, and spring academic terms, the census date is the 15th day of instruction. We take a snapshot of Banner at the end of the 15th day. We only import data on courses that have registered students at the time of the snapshot.

Checked by Editor  Editors must check this field after completing their review and/or editing (data has been verified by the editors, whether they need to make any changes or not). A “Y” indicator will appear in the “edited” column of the Course Lookup Screen, once all of the sections of a particular course have been “Checked by Editor”. DESII Screen(s): Course Edit Screen.

Class Type  The teaching/learning activity type or primary mode of instruction for a section (e.g., lecture, laboratory, discussion, fieldwork etc.). The source for section type is Banner and should reflect the course format approved by the academic senate. If, however, Banner differs from the course approval form, you should contact the DESII support team to correct the class type in DESII for the current term. For permanent changes, contact the Office of the Registrar. DESII Screen(s): Course Edit Screen.

Concurrent  Classes that are scheduled at the same time and in the same building and room, but are considered separate teaching activities. You will be able to see concurrent classes when they exist by clicking the “View Concurrent” button in the Course Edit Screen. DESII Screen(s): Course Edit Screen.

Contact Hrs  Instructors’ hours per week; the average number of hours per week the instructor spends in the classroom. Instructor contact hours are reported in two categories: time in scheduled class meetings and self-reported time in unscheduled class meetings. DESII Screen(s): Course Edit Screen and Instructor Edit.

Course Number  A three digit number that may include a one or two character alphabetic suffix. DESII Screen(s): Course Lookup and Course Edit Screen.
Course Title
The title published in the Class Schedule and Registration Guide and used in Banner. DESII Screen(s): Course Lookup and Course Edit Screen.

Crdt%
This field indicates how the student credit hours associated with the course will be allocated to some or all of the instructors teaching in that course. Instructor responsibility is calculated by the system and the allocations sum to 100%. Only instructors with “Primary” and “Primary-No Grade Sheet Authority” roles receive a percentage of responsibility for the course. DESII Screen(s): Course Edit Screen.

Credit bearing
A section is considered credit bearing when the unit value for it is greater than “0” (variable unit and fixed unit courses). In courses with combination class type, the credit bearing section is considered the primary section and the non-credit bearing is considered the secondary section(s). The student credit hours will be linked with the credit bearing section.

Cross-listed
Multiple departments sometimes offer the same course; these courses are called cross-listed courses. That is, two or more course listings identify the same courses. Cross-listed courses are identical in title and content description and will generally have same course number – only the course prefix varies. Cross-listed courses must be approved through the Academic Senate. Any course that is cross-listed with your course will appear in the “Cross Listed With” section in the Course Edit Screen. DESII Screen(s): Course Edit Screen.

Day
Days of the week that a class meets. You may leave this field blank if a class is unscheduled (does not meet on a scheduled basis). DESII Screen(s): Course Edit Screen and Facility Edit.

Edited
Edited indicator “Y” means editing for all sections of a particular course has been completed (all sections have the “Checked by Editor” field marked in the Course Edit Screen). DESII Screen(s): Course Lookup.

Enrollment
Total number of registered students enrolled in a class as of the 15th day of instruction each term according to Banner. DESII Screen(s): Course Edit Screen.

Instructor Name
Instructors who teach a course and are paid during the quarter. Only missing instructors with valid UCD appointments can be added to the database. DESII Screen(s): Course Edit Screen.

No UCD Appt
The instructor of record does not have an UCD appointment. DESII Screen(s): Course Edit Screen.

Non-credit bearing
A section with a unit value of “0”. In courses with combination class types, the credit for the course will be linked with the primary section. There are no student credit hours associated with non-credit bearing courses.
Open for Editing Identifies the database opened for editing by term and academic year. 
*DESII Screen(s): Course Lookup.*

Registered Student In DESII, a registered student is defined as being enrolled and paid on the census date.

Role A description of an instructor’s teaching activity in the class section in which he or she participates. There are six instructor types in DESII: Primary, Secondary, Support, Primary-no grade sheet authority, Supervisor and Guest. See page 34 of the DESII manual. 
*DESII Screen(s): Course Edit Screen and Instructor Edit.*

Room A four digit room code that uniquely identifies the room. If generic designation is entered in as the building, this field can be left blank. 
*DESII Screen(s): Course Edit Screen and Facility Edit.*

Section number Identifies the section of the course. Only sections with registered students will be imported into DESII. 
*DESII Screen(s): Course Edit Screen.*

Stdt Hr Override Clicking the Stdt Hr Override field will allow you to override the system calculated weekly student hours based on the scheduled hours and days.

Student Credit Hrs The total number of unit credits earned by all enrollees in the class. No changes are allowed in student credit hours (SCH). The SCH shown are those in Banner for students who are officially enrolled in the course (i.e., they are registered in the course and have paid registration fees as of the 15th day of instruction). The definition of SCH is “the enrollment in a course multiplied by the course credit value.” For variable unit sections, it is the sum of all the units earned by the students in that credit bearing section. 
*DESII Screen(s): Course Edit Screen.*

Subject A three-letter subject code used in the Class Schedule and Registration Guide and Banner, e.g., Mathematics = MAT. 
*DESII Screen(s): Course Lookup, Course Activity Report Selection and Course Edit Screen.*

Term 

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</tr>
<tr>
<td>SV</td>
<td>Summer Semester  (New as of 2014)</td>
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*DESII Screen(s): Course Edit Screen.*
Units  The unit value of a course; the Academic credits earned by each student enrolled in class. DESII Screen(s): Course Edit Screen.

VAR  Variable Units
NON  Non-Credit
Numerical Value  Fixed Unit(s)

DESII Screen(s): Course Edit Screen.

Weekly Student Hrs  The number of hours per week each student spends in a formal classroom meeting. DESII Screen(s): Course Edit Screen.

Weeks  The number of weeks that defines the length of a course in a particular term. DESII Screen(s): Course Edit Screen.

# CR Sects  The number of credit bearing sections associated with a course. DESII Screen(s): Course Lookup.

# NC Sects  The number of non-credit bearing sections associated with a course. DESII Screen(s): Course Lookup.
APPENDIX 1 – LOOKUP OF VALID SUBJECTS USING THE SELECT SUBJECT SCREEN

**Step 1 of 2** – From the COURSE LOOKUP screen, you can double-click in the **Subject** field (in the Selection Criteria block) to do a lookup of valid subjects.

The SELECT SUBJECT screen will appear, allowing you to search for a particular subject code by scrolling through the list of values.

**Step 2 of 2** – To exit with value, highlight the desired subject and click the **OK** button.

The selected subject code will automatically populate the **Subject** field in the COURSE LOOKUP screen.
To narrow down the list of values, use the Find field to do a search within the SELECT SUBJECT screen.

Step 1 of 3 – You can enter any part of either the Code or the Name of the desired subject, using the wildcard (%) as a placeholder for strings of characters.

Step 2 of 3 – Click the Find button to get your results.

Step 3 of 3 – To exit with value, highlight the desired subject and click the OK button.

The selected subject code will automatically populate the Subject field in the COURSE LOOKUP screen.

Click the Cancel button to cancel the search and return to the COURSE LOOKUP screen.
APPENDIX 2 – LOOKUP OF VALID BUILDINGS USING BUILDING CODE SCREEN

Step 1 of 2 – Double-click in the Building field (in the FACILITIES EDIT screen) to do a lookup of valid building codes.

The BUILDING CODE screen will appear, allowing you to search for a particular building code by scrolling through the list of values.

Step 2 of 2 – To exit with value, highlight the desired building and click the OK button.

The selected building code will automatically populate the Building field in the FACILITIES EDIT screen.
To narrow down the list of values, use the Find field to do a search within the BUILDING CODE screen.

**Step 1 of 3** – You can enter any part of either the Code or the Description of the desired building, using the wildcard (%) as a placeholder for strings of characters.

**Step 2 of 3** – Click the Find button to get your results.

**Step 3 of 3** – To exit with value, highlight the desired building code and click the OK button.

The selected building code will automatically populate the Building field in the FACILITIES EDIT screen.

Click the Cancel button to cancel the search and return to the FACILITIES EDIT screen.
APPENDIX 3 – LOOKUP OF VALID ROOMS USING ROOM LOOKUP SCREEN

Step 1 of 2 – Double-click in the Room field (in the FACILITIES EDIT screen) to do a lookup of valid building room code associated with building in the Building field.

The ROOM LOOKUP screen will appear, allowing you to search for a particular building room code by scrolling through the list of values.

Step 2 of 2 – To exit with value, highlight the desired building room code and click the OK button.

The selected building room code will automatically populate the Room field in the FACILITIES EDIT screen.
To narrow down the list of values, use the **Find** field to do a search within the ROOM LOOKUP screen.

**Step 1 of 3** – You can enter any part of either the Code or the Description, using the wildcard (%) as a placeholder for strings of characters.

**Step 2 of 3** – Click the **Find** button to get your results.

**Step 3 of 3** – To exit with value, highlight the desired building room code and click the **OK** button.

The selected building room code will automatically populate the **Room** field in the FACILITIES EDIT screen.

Click the **Cancel** button to cancel the search and return to the FACILITIES EDIT screen.
APPENDIX 4 – SETTING PARAMETERS FOR REPORT 421 (INSTRUCTOR ACTIVITY REPORT)

In this section are examples of the two types of search methods that are generally performed.

Example A – by instructor name(s) / (Instructor ID). This is the case where you may wish to produce a report of a specific instructor(s). In this example, you will be doing a search by instructor name(s) / (Instructor ID). This search method is recommended for generating reports needed for Merit and Promotion packages. (See page 64.)

Example B – by Department (Academic Unit Code) and Rank(s). This is the case where you may wish to produce a report of all instructors in a specific department and/or rank(s). In this example, you will be doing a search by Department (Academic Unit Code) and Rank(s). (See page 65.)

Academic Year Code(s) is a required field. Multiple Years are only allowed if Instructor ID field is entered.

Academic Unit Code, Academic Rank(s) and Instructors ID are not all required fields, but at least one of Academic Unit Code or Instructor ID must be entered. Multiple Academic Ranks and Instructor ID may be selected using the “List” feature.
Example A: 421 - Instructor Teaching Activity Report – By Instructor ID

A. Select Academic Year Code(s).
B. Click the blue field name Instructor Id to get to the INSTRUCTOR LOOKUP window.
   1. Type in Instructor Partial or Full Name.
   2. Press the Go button (not the Enter key).
   3. Use the check boxes to select/unselect any Instructor(s).
   4. Press the Return Value(s) button.
C. Select PDF file as your Display Format (or you can select Browser).

It is recommended that you leave Academic Unit Code and/or Academic Rank(s) field(s) blank if you are doing a search by instructor name(s) / Instructor ID. Please note that you can “list” multiple instructors. After your first entry, click List, and click the blue field name Instructor Id again to get to the INSTRUCTOR LOOKUP window. Continue this process until you have listed all the instructors you wish.
Example B: 421 - Instructor Teaching Activity Report – By Department and Rank

B. Select **Academic Year Code(s)**.

C. Click the blue field name **Academic Unit Code** to get to the ACADEMIC UNIT - PAY DEPARTMENT LOOKUP window.
   1. Select applicable year.
   2. Press the **Go** button.
   3. Select the Academic Unit by clicking on the Academic Unit code.
D. Click the blue field name **Academic Rank(s)** to get to the ACADEMIC RANK LOOKUP window.
1. Select applicable year(s).
2. Press the **Go** button.
3. Use the check boxes to select/unselect any Academic Ranks
4. Press the **Return Value(s)** button.

Note: It is highly recommended to use the lookup feature whenever it is available to avoid error in code entry.
Instructor Teaching Activity Report (421)

List of courses taught per instructor for an academic year, including appointment information. Cautions: Teaching activity information regarding courses originating from the Health Sciences is based on unedited data; refer to the Reviewed by course department indicator on the far right column of the report.

Main Menu >> Instructor Reports >> Instructor Teaching Activity Report

- Open Results Page in New Window

**Legend**
- ^ - Required Field
- % - Wild Cards Allowed
- ☉ - Field Descriptions Available
- Blue Field Name - Click for a Picklist

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field Input</th>
<th>☉ Click to Show Field Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year Code(s) ^</td>
<td>2002-2003</td>
<td>☉</td>
</tr>
<tr>
<td>Academic Unit Code</td>
<td>AGR ECO</td>
<td>☉</td>
</tr>
<tr>
<td>Academic Rank(s)</td>
<td>ADJUNCT List</td>
<td>☉</td>
</tr>
<tr>
<td>Instructors Id</td>
<td>List</td>
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<tr>
<td>Display Format</td>
<td>Browser PDF file</td>
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</tbody>
</table>

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