TERM PLANNING ROLL-FORWARD notes

Availability of Offering fields
The first thing you will notice when you go into term planning the first time for a teaching period is that the following Availability of Offering fields have all been reset to “Undecided”:

- Is [the course] offered this term [ie semester]?
- Are classes to be centrally timetabled?
- Does [the course] have a formal examination?

At the very least, even if none of your requirements have changed, you will need to accurately update these values. For clarity, please ensure that by the deadline Undecideds are changed to either Yes or No rather than leaving them as Undecided.

Note, the examination field has a later deadline than the term planning deadline [the Exams Unit will provide separate advice about their deadlines].

Course Notes and Special Requests – action required
You will also notice that any notes entered on last years term planning records [both Course Notes and Special Requests] have been prefixed with the text **UNCONFIRMED**. If the note is still applicable you should delete the **UNCONFIRMED** text and save the record. If the previous note is no longer applicable, update or delete it as appropriate [deleting the **UNCONFIRMED** text in these cases also]. This is our way of knowing that the data has been checked and updated as appropriate.

Planned size
For centrally timetabled courses, you should also carefully check the planned size on the initial term planning page [rolled forward from figure entered previously]. If this has changed, in addition to updating the data here you will also need to update it on the Activity Structure and Streamed Activity Planning pages. Note, the validation on this field allows for a 20% increase on the highest figure over the previous 4 teaching periods. Please consider your estimate here carefully and try to provide a reliable estimate of anticipated enrolment numbers. If the planned size needs to be increased beyond the 20% due to a trend of increasing enrolments or curriculum changes etc please contact SARU for assistance.

Week patterns
Please ensure week patterns are checked carefully and updated where necessary.

Other points to note regarding the Term Planning roll:
- Records for courses which have been inactivated won’t be rolled
- Courses which are no longer combined [in Course Relationships in the Course Catalogue] will have their combined flag reset [unchecked] on the Activity Stream page.
- Inactive staff records are taken into account i.e. if inactive they are removed from the Staff Contact field, from Activity meeting events, and from staff pools. Staff pools containing all inactive staff will be removed.

**What if a rolled-forward record is not offered this semester?**
You don’t need to delete all the underlying details and requirements if not offered. Simply update to offered: ‘no’.

**What if everything has changed or I got it wrong last time and I want to start all over again?**
On the Activity Structure page you can delete the existing activities and start again.

**What if the semester of offering has changed for a particular course?**
If you don’t wish to re-enter the term planning data from scratch, it is possible for us to roll a term planning record from one teaching period to another e.g. T2 to T1. Contact SARU with your request.

It may also be desirable to request that some “flexible delivery” course records are rolled from one teaching period to another eg from a main to a non-standard teaching period.