Working with Cohorts

Job Aid for Cohort Registration

Student Records

February 2007
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Overview

Cohort Management is a process used to link classes together throughout the registration process. Cohorts are built by the Cohort Managers using the Cohort Groups pages. There are various controls that can be utilized in building cohorts that offer different ways that a cohort, or block of classes, can be set-up and managed. These controls are used to create cohorts for various ASU programs, such as Campus Match or Learning Communities or to simplify the registration process by presenting students with blocks of critical classes.

Cohorts may be built so that they are available to all students or only available to students in a specific career, program, plan or academic level. Cohorts may also be restricted to only students who have been granted permission to register for the specific cohort or they may be left open to all students who match the appropriate academic criteria for the cohort.

When registering for classes students will be able to view and select from only the class blocks that they are eligible for based on their own academic profile and the enrollment restrictions of the cohort. Students will be able to see those cohorts that require permission to register, and the cohort will be notated as such.

For example, the W. P. Carey School of Business may build several class blocks designed for Freshmen Finance majors. Only students with a program of College of Business, a plan of Finance, and an academic level of freshman, may see and/or register for the cohort. Additional permission may, or may not, be required to register.

If there are no seats available in a cohort, it will not be displayed to the student.

Your menu options may vary based upon your security setup.
Terminology

**Cohort:** A group of classes and/or students linked during the registration process.

As Cohorts are established, matching Student Groups are set-up by the cohort setup process to control access to the cohorts at registration. These Student Groups will use the code ‘CM’ in the student group code to identify them as Cohort Management student groups. Cohort Codes will be used in creating the student groups that are used to manage the cohort management process. The 10-character Cohort Code will become the Short Description of the student group created for the cohort. The Description for the Cohort becomes the Long Description for the cohort Student Group.

During the Student Cohort Group Permission process, when the student is given permission to register for a cohort, they are automatically put into the student group that is a requirement for registering for the cohort. Students should not be moved in and out of the Cohort Management student groups manually.

**Cohort Code:** This code is established by the cohort manager when the cohort is created. Read the section on Cohort Naming Standards before naming your cohorts.

**Class Block:** another term for a cohort.

**Description:** This description field is used to describe the cohort in 30-characters. This description will also be used for the Student Group created for the Cohort.

**Student Group:** The Student Group code is displayed once the student group is created “behind-the-scenes” and uses the naming convention for Cohort Management Student Groups of “CM—”.

**Reserve Capacity/Reserve Until:** Allows cohort managers to specify the number of seats to reserve for the cohort and when to release these seats from the cohort.

**Permission Required:** This checkbox specifies whether or not a student will need to be given permission to enroll in a cohort. If permission is not required, any student who meets the criteria for the cohort may enroll in it.

**Permit Changes:** Three different options are available for controlling registration actions for a cohort.

(0) No Restrictions – After the initial registration there are no registration restrictions for dropping or swapping classes that are part of the cohort.

(1) No Drops During Add/Drop – After the initial registration the student is not allowed to drop/swap individual classes that are part of the cohort until the end of the drop/add period. The student is allowed to drop the entire cohort. Used mainly for Campus Match programs.

(2) No Individual Drops – After the initial registration the student is not allowed to drop/withdraw from any of the classes that make up the cohort at any point during the term. This restriction is used for the Learning Communities programs, where the content of the classes is tied for the entire semester.

**Enrollment Restrictions**

Whether or not a student can register for a cohort depends on the set-up of the cohort and/or, when specified, the academic profile of the student.
Whether or not Permission is required is set up on the Cohort Setup tab. Restrictions based on the academic profile of the student are set up on the Enrollment Restrictions tab.

If the cohort is set up with Permission Required, the student must be granted specific permission to be able to register for the cohort.

If the cohort is setup without Permission Required, but does have Enrollment Restrictions, then only those students who meet the requirements of the Program, and/or plan, and/or Academic Level specified may register for the cohort.

If the cohort is setup without Permission Required, and no Enrollment Restrictions, any student may register for the cohort.

Note: once the cohort registration checks are passed, the enrollment requirements of each class that makes up the cohort are still enforced. If the student in ineligible to register for any of the classes, they are prevented from registering for the cohort.

Naming Standards for Cohort Codes

Cohorts are named following some institutional standards to make them easier to identify. Programs setting up cohorts determine their own cohort codes. Use the naming standards when searching for cohorts.

Searches can also be used to find key words in cohort descriptions.

Cohort Name Guidelines

- Campus-wide programs, begin the cohort code with the 1-character campus code.
- Campus Match programs – campus code + CM
- Learning communities – campus code + LC
- College programs – college code + department code and/or special program codes
  - Class Blocks – CB
  - Tracking - TR

Examples

<table>
<thead>
<tr>
<th>Cohort Name</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tempe Campus - Campus Match</td>
<td>TCMnnnnnnnn</td>
</tr>
<tr>
<td>West Campus - Campus Match</td>
<td>WCMnnnnnnn</td>
</tr>
<tr>
<td>Polytechnic Campus - Campus Match</td>
<td>PCMnnnnnnnn</td>
</tr>
<tr>
<td>Downtown Campus - Campus Match</td>
<td>DCMnnnnnnnn</td>
</tr>
<tr>
<td>College of Liberal Arts and Sciences, Learning Communities</td>
<td>LALCnnnnnn</td>
</tr>
<tr>
<td>College of Engineering – Fulton Match</td>
<td>ESFMnnnnnn</td>
</tr>
<tr>
<td>West Campus - Learning Communities</td>
<td>WESTLCnnnnnn</td>
</tr>
<tr>
<td>CLAS - Geographical Sciences Cohorts</td>
<td>LAGEOSnnnn</td>
</tr>
<tr>
<td>All Colleges – College Class Blocks</td>
<td>2-character college code + CB (Class Block) + 6 identifying characters</td>
</tr>
</tbody>
</table>

The Description for the Cohort can be used as determined by the program. This description will be visible to students when they view cohorts in the schedule of classes.
Access

Special access is required for some of the cohort functions, and in some cases, training is also required.

To Build Cohorts, hands-on training is required, and the security role of:

**ASU_SA_SR COHORT MGR**

To View Cohorts, complete online training, and the security role of:

**ASU_SA_SR COHORT MGMT VIEW**

To grant Student Enrollment Permissions complete online training, and the security role of:

**ASU_SA_SR COHORT PERMISSION**

All users can view cohorts/class blocks via the class search.

Students can view cohorts for registration via the **Class Search** and the **Add a class** functions.
View Cohort

To view the details of a cohort

Navigation:
ASU Customizations → ASU Student Records → Cohort Groups

Step 1  Find an Existing Value  Select this tab

Step 2  Enter search criteria  Enter values to narrow your cohort search
Entering no criteria will bring up all cohorts

Asu Cohort Perm
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Academic Institution: begins with  ASU00
Academic Career: =  Undergraduate
Term: begins with  2077
Cohort Code: begins with
Description: contains  campus match
Academic Program: begins with
Academic Plan: begins with
Academic Level: =

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Step 3  Select  Search  Select to find a an existing cohort
Step 4 Cohorts that meet the search criteria will display

Asu Cohort Perm
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

| Academic Institution: | begins with | ASU00 |
| Academic Career: | = | Undergraduate |
| Term: | begins with | 2077 |
| Cohort Code: | begins with |
| Description: | contains | campus match |
| Academic Program: | begins with |
| Academic Plan: | begins with |
| Academic Level: | = |

Search Results

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Academic Career</th>
<th>Term</th>
<th>Cohort Code</th>
<th>Description</th>
<th>Academic Program</th>
<th>Academic Plan</th>
<th>Academic Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASU00</td>
<td>Undergrad</td>
<td>2077</td>
<td>DCM001</td>
<td>Downtown Campus Match 001</td>
<td>UGNN</td>
<td>NUNURDBSN</td>
<td>Sophomore</td>
</tr>
<tr>
<td>ASU00</td>
<td>Undergrad</td>
<td>2077</td>
<td>PCM001</td>
<td>Polytechnic Campus Match 01</td>
<td>GRAG</td>
<td>AGAGBM3</td>
<td>Sophomore</td>
</tr>
<tr>
<td>ASU00</td>
<td>Undergrad</td>
<td>2077</td>
<td>TEMCLASS01</td>
<td>Tempe Campus Match CLASS 01</td>
<td>GRRA</td>
<td>BAACCRRS</td>
<td>Freshman</td>
</tr>
<tr>
<td>ASU00</td>
<td>Undergrad</td>
<td>2077</td>
<td>TCACLASS01</td>
<td>Tempe Campus Match CLASS 01</td>
<td>GRRA</td>
<td>BAACCRRS</td>
<td>Sophomore</td>
</tr>
<tr>
<td>ASU00</td>
<td>Undergrad</td>
<td>2077</td>
<td>WCM001</td>
<td>West Campus Match 001</td>
<td>UCUC</td>
<td>(blank)</td>
<td>(blank)</td>
</tr>
</tbody>
</table>

Find an Existing Value Add a New Value

Step 5 Select the cohort you want to view

If a cohort has multiple Enrollment Restrictions, the cohort will display multiple times. Selecting any of the rows will take you to the cohort setup pages for the selected.

Step 6 View Cohort, selecting tabs as desired
Grant Student Cohort Permissions

Cohorts may be set up with both academic restrictions and/or require individual permission to register.

Students must be granted permission for specific cohorts when permission is required. There is no limit to the number of cohort permissions a student may have at one time.

If a cohort has academic enrollment restrictions, the student still must meet those restrictions even if they have been given permission to enroll in the cohort.

Individual course requirements are still in effect for all classes, and student must meet all of the requirements of all of the cohort classes to enroll in the cohort.

To give a student permission to register for a cohort/class block, the Grant Student Permission component is used.

Navigation:
ASU Customizations → ASU Student Records → Cohort Groups → Find an Existing Value → Student Cohort Permission tab

Retrieve Cohort

Step 1 find Cohort Use the search criteria to find the cohort you want to work with

See View Existing Cohort

Step 2 Select Student Cohort Permission tab
**Step 3** enter EmplID of student

Enter the EmplID of the student you want to give cohort permission to.

If you do not know the EmplID of the student you may use the search feature to find the student.

Click on the search icon by the EmplId field and use the student search criteria to find your student.

![Look Up EmplID](image)

**Step 4** enter Permission Expire Date

Enter the date that the permission will expire.

Or,

Use the calendar icon to select a date. The student will be able to enroll in the cohort until this date passes.

**Step 5** Save your permission

Use the save icon to save your entry.

To add more student permissions, for the selected cohort, use the plus sign icon to add more rows.
When the student uses the permission to register for the class the Permission Used Date will be populated.

To remove the permission from a student, use the minus sign to delete the permission.
Cohort Quick Enroll

Navigation:
ASU Customizations → ASU Student Records → Quick Enroll

Find Student, enter enrollment information

When the Quick Enroll page displays, select the **Cohort Add** option.
When the Cohort Add page displays, you can enter a cohort code, or view eligible cohorts for the student. Use the arrows or view all to see all cohorts.

You can also enter various criteria and use the filter button to narrow the displayed cohorts further.

If cohorts require permission, and student does not have permission, the cohort will not display with eligible cohorts.

Use the select cohort button to select the cohort for enrollment. This code will then display in the Select a Cohort Code box. Use the Attempt Cohort Enrollment button to begin enrollment in the cohort.
If enrollment is successful, you will receive a notification to indicate this. If the student does not have permission for the cohort, does not meet enrollment requirement, or if there are enrollment errors for the individual classes, error messages will display.
Cohort Quick Drop

Navigation:
ASU Customizations → ASU Student Records → Quick Enroll

Find Student, enter enrollment information

When the Quick Enroll page displays, select the Cohort Drop option.
If the student is registered for cohorts, they are displayed. Use the Select for drop to select a cohort to drop. Then use the Drop Select Cohort button to drop the cohort.

If the cohort is dropped successfully, a confirmation message is displayed.
Student Self-service – using cohorts

From the Student Center, using **Add a class**, students will select cohorts to enroll in. Students will select the option below to see all class blocks that are available to them.
Student may enter a class block and select to enroll and then attempt block enrollment

OR

Students can do one of the following to find the cohort they want to enroll in:

- Use the View all or arrows to view all available cohorts

- Use the Groupbox options and the apply filter to narrow down their selection options

Once they find and select the cohort they want, the code will display in the Selected Class block box and the student can attempt block enrollment.
Students are shown their selection and are asked to confirm it.

If their enrollment is successful, they are given a confirmation message. If they answer 'yes' enrollment is attempted. If successful, they are given a confirmation message. If there are enrollment errors, they are displayed.

Classes in cohorts display in the student’s schedule similarly to their non-cohort classes.

Students are held to the individual class drop rules of the cohort if they try to drop individual cohort classes.
Class Search

Students, and staff searching for a class for a student, can utilize the class search button to view all cohorts offered by selecting the search for class blocks option.

Various search criteria can be entered to narrow the class block search.