

Bulk Optional Course Enrolments

Guide for Schools



THE UNIVERSITY
of EDINBURGH

Registry Services

May 2023



Index

Introduction.....	3
Requirements	3
Procedure overview	4
Confirming use of service.....	5
Courses owned by another School/Deanery	5
Quota.....	5
Providing Course Enrolment Data	6
Data Validation (Prompts in Yellow)	7
Upload Course Enrolment Data and Notify Student Record Operations	9
Check Enrolments	9



Introduction

This process is designed to support Schools with bulk optional course enrolments, allowing multiple students to be enrolled at course level which removes the need for the School to enrol at student level in EUCLID.

Requirements

The following requirements must be met in order to complete this procedure.

Software

- Office 365: Excel, SharePoint

Systems access and roles

- SharePoint – Access to the private site for the service

Knowledge

- Knowledge of School level student allocation process



Procedure overview

Before providing data to the service:

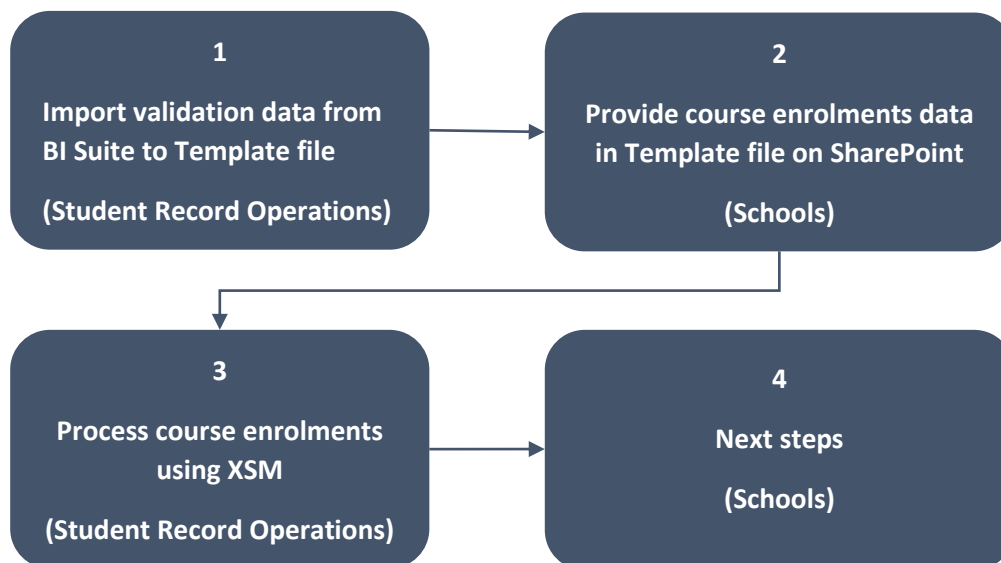
- **Schools must** complete their own processes for allocating students to courses where applicable
- Check prerequisites, etc.

Provide details of the students and course codes for upload to the student record. This document gives full instructions on how this should be done.

After the upload of data to the student record:

- **Schools must** ensure students have all credits required by the end of week two
- **Schools must** ensure course enrolment rules are checked, and where necessary corrected, separately as this isn't possible via the bulk course enrolment process (see the ['Maintain Course Enrolment Rules'](#) guidance)

The flow chart below summarises the steps in the end to end procedure.



RACI Matrix

Task	School	Student Record Operations
Collate student course selections	A/R	
Allocate course to students	A/R	
Import validation data from BI Suite to Template file	I	A/R
Provide course enrolments data in Template file on SharePoint	A/R	
Adding course enrolments to multiple students using XSM	A/I	R
Check students have appropriate credits	A/R	
Maintain Course Enrolment	A/R	

(R) Responsible, (A) Accountable, (C) Consulted, (I) Informed



Confirming use of service

Each year an MS Form will be used to ask Schools and Deaneries if they would like to sign-up to the service. The form will ask to confirm the number of courses and when the file will be uploaded on a private SharePoint site for the service. This information will give Student Record Operations an idea of expected volume and timings, and will be used to plan resources for the service.

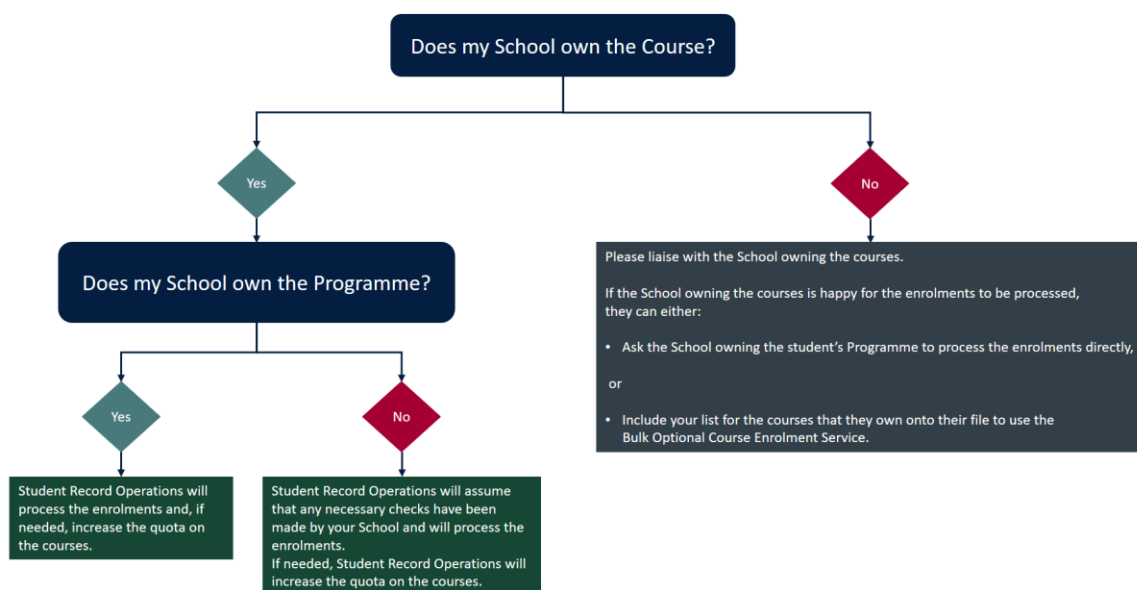
The MS Form includes confirmation of School administrative staff for the academic year. Only these colleagues will be given access to the SharePoint site used for providing data to the service.

Courses owned by another School/Deanery

The workflow below clarifies the process on the basis of course ownership.

If your School/Deanery owns the courses, the enrolments will all be processed regardless of who owns the programmes.

If your School/Deanery does not own the courses, where applicable, please liaise with the School owning the courses. If needed, the School owning the courses can include your list for the courses that they own onto their file to use the Bulk Optional Course Enrolment Service.



Quota

Student Record Operations is assuming that the data submitted to the service for upload has been cross checked with any quota set for course enrolments. If you submit enrolments that will take courses over the quota, Student Record Operations is assuming that you would like the quota increased. Any checks on the impact of teaching spaces or other impacts on increasing the quota should be carried out before submitting the enrolments.

Schools will not be asked to provide evidence of this, however the service is only responsible for the upload of data provided and is not able to cross check this against any other relevant information.



Providing Course Enrolment Data

Student Record Operations will notify your School/Deanery contacts when the Template file is available on SharePoint. The file includes validation data for all students and all courses open in the University in the upcoming academic year.

1. Open [SharePoint](#).
2. Click the 'Download the Template' button.
IMPORTANT: The file contains personal student data for validation; please use a workspace that is accessible only by relevant staff. Do not share the file via email.
3. Within your local space, in the 'School Course Enrolments' tab, populate the course enrolment data:
 - Column A: Course Code
 - Column B: Student UUN

The spreadsheet can include multiple courses and we ask that, where possible, you only submit one file per School, unless we have agreed different deadlines for different cohorts of students.

TIP: If your students list doesn't have the 's' at the beginning of the UUN number, you can use a =CONCATENATE formula to add the 's' before pasting the data into the Template file. If needed, and you are not sure how to use the =CONCATENATE formulas, please get in touch.

4. Review your data to ensure it is valid so that the upload will run smoothly.

You will notice that Columns F to W will populate automatically. The formulas in these columns have been designed to help you see if there are any issues.

You will be prompted to enter the followings if needed:

- **Occurrence and Period:** if a Course Code has more than one Occurrence/Period, you will have to enter the data in Columns C and D.
- **More than one student UUN Instance:** if the student UUN has more than one instance, you will be prompted to enter the relevant UUN Instance in Column E.

IMPORTANT:

If the number of enrolments requested on your list is over the Course Quota set in EUCLID, a message in red in Column G will display by how many students you are over the quota. Student Record Operations will assume that if you submit enrolments that will lead to more enrolments than the quota, you would like the quota increased. Student Record Operations will change the course quota to enrol the students. If you do NOT want the course quota to be changed, please remove the extra students.



School/Deanery owning the course

Column I will display which School/Deanery owns the course.

Your file should only contain enrolments for courses that your School owns. If you leave enrolments for outside courses onto the file, the service will skip those and enrol the other requests for the courses that your School owns.

You should check that the data matches what is expected from any local records. Any queries regarding mismatched data should be directed to studentsystems@ed.ac.uk

Data Validation (Prompts in Yellow)

On the tab 'School Course Enrolments', Columns F to W have the formulas that populate according to what you have entered in Columns A and B.

NOTE: if you have more than 10,000 rows, please email studentsystems@ed.ac.uk

We have built the following validation messages in the Template:

- **Invalid Course Code in Column A!**
If this is displayed on any of the Columns, please check if you have entered an incorrect Course Code in Column A. There might be a typo in the Course Code in Column A or an extra space before/after the code.
It is also possible that the Course Code you have entered doesn't have an instance in the upcoming academic year and therefore is not available. You can check this in EUCLID > DPTs and Courses, under 'Course Creation, Approval and Maintenance' > View Course, retrieve the course code and check in the 'Delivery Information' tab if there is an instance for the upcoming academic year.
- **Please ENTER Occurrence/Period in Columns C/D!**
If Column F 'Does the Course Code have more than one Occurrence/Period?' has 'YES' in yellow, please enter the Occurrence/Period in Columns C/D. Student Record Operations will need this information to be able to enrol students onto the correct Course Instance.
- **Please CHECK Occurrence/Period in Columns C/D!**
If this is displayed, please check if you have entered an incorrect Occurrence/Period in Columns C/D or if the information is missing on either column. Student Record Operations will need this information to be able to enrol students onto the correct Course Instance.
- **Please ENTER student UUN in Column B!**
If you have entered a Course Code in Column A but have left Column B blank, you will be prompted to enter the student UUN. Student Record Operations can't process enrolments without the student UUN.
- **Please CHECK student UUN in Column B!**
If this is displayed, please check if you have entered an incorrect student UUN in Column B. There might be a typo, a space, or the 's' at the beginning of the UUN might be missing.



It is also possible that you have entered a UUN for an applicant or student who has withdrawn.

Students don't need to be Fully Matriculated but do need a student record for the relevant academic year with one of these statuses:

- New entrant not yet matriculated
- Continuing student not yet matriculated
- Fully matriculated

A student might not have a record for the upcoming year due to debt in the previous year.

If you can't trace or resolve the issue, please get in touch with Student Record Operations.

- **YES - please ENTER UUN Instance in Column E!**

This message appears if you have entered a student UUN in Column B that has more than one instance. You will have to specify which UUN Instance should be enrolled by entering the correct information in Column E.

- **Please CHECK student UUN Instance in Column E!**

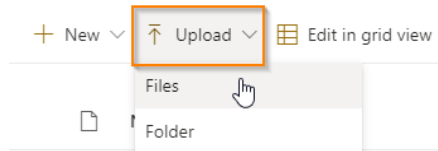
If you have entered an incorrect UUN Instance in Column E, you will be prompted to check the information. The first 8 characters of the UUN Instance must match the UUN that was entered in Column B.



Upload Course Enrolment Data and Notify Student Record Operations

When your file is ready, open [SharePoint](#).

1. Navigate to your School/Deanery folder and to the relevant academic year.
2. Upload your file.



Email studentsystems@ed.ac.uk to let the team know that the data is ready to be processed.

Please do not make any changes in the file after emailing the team. If an enrolment that was requested is no longer needed, either email Student Record Operations to let them know or wait for confirmation that the bulk process is complete before removing enrolments.

Student Record Operations might contact you if they have any queries.

Check Enrolments

Student Record Operations will let you know when the enrolments have been processed.

It is the School's responsibility to ensure students have the required number of credits by the end of week 2. The following BI Suite report can assist with this:

Report location

Public Folders > SASG: Student Systems > Officially Dev & Maintained > Student > Course Reports

Report title

C20 - Count of Course credits undertaken by student

The report can be sorted by programme and year of student for easier checks.

Any further amendments required to a student's allocation must be actioned in full by the School, using '[Maintain Course Enrolment Rules](#)', if necessary.