



STUDENT AND ACADEMIC SYSTEMS TRAINING

Complete a CSM Form User Guide

Introduction

Welcome to the **Complete a CSM Form User Guide**. Training materials can be found on the web at <http://www.neiu.edu/~neutrng>.

Objectives

Upon completion of this training, the learner will be able to:

- Understand the complete CSM process and their responsibilities.
- Copy files to another drive (C:, H:, or P:).
- Use the Excel template to enter data.
- Merge the saved Excel file with the Word template & print.
- Use the Word template to enter data.
(Written instructions provided but not demonstrated.)
- Fill out the CSM form fields correctly.

Pre-Requisites

In order to attend this class, participants must have the following pre-requisites:

- Basic skills in Windows, Word, and Excel are recommended.

Icon Key





Please Note	Useful Tip	Question	Job Aid
			

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SECTION 1: Overview of CSM Process

Academic Departments will:

- Enter course information on the CSM Input form
- Print the CSM Report for each course section
- Submit all reports to their Dean's Office

The Dean's Office will:

- Review the reports for accuracy and completeness
- Submit the reports to Academic Affairs

Academic Affairs will:



- Review and approve the reports
- Submit the reports to the Registration Office

The Registration Office will:



- Enter the final reports into the Banner system

SECTION 2: Copy Files to User's Drive






Before beginning this process, we recommend that you copy the CSM templates you will be using to your folders. Both templates (one in Excel and one in Word) can be found on the network U: Drive at U:\Banner CSM. You only need to complete the steps in this section once per semester.

Step	Action
1.	Open My Computer or Windows Explorer.
2.	Navigate to the U: Drive.
	If you do not have U: Drive access, you can request it through the Help Desk, x4357.
3.	Find and open the Banner CSM folder.
4.	Select these files: <ul style="list-style-type: none"> • CSM Data Input Form.xlt • CSM Report merge.dot
	If you want to fill in the Word form one at a time, without using the Excel spreadsheet and the mail merge process, you only need to select CSM Report non-merge.dot.
5.	Right click on the selection and choose Copy.
6.	Navigate to the location where you want to save the files.
7.	Click in the list of files, and then right click and choose Paste.

SECTION 3: Enter Data on Excel Template




Step	Action
8.	Open CSM Data Input Form.xlt
9.	Fill out the necessary fields on the spreadsheet, using one row for each course to be submitted.
	Use the Tab key to move from cell to cell across a row. Press Enter to start a new row for another course. If needed, press the Home key to return to the first cell in the row.
	Refer to the section on each field for details.
10.	When you are finished filling in the data for all courses, click the Save icon.
11.	Name the file, select an appropriate location for it, and then click Save.
12.	Close Excel.

SECTION 4: Merge to Word Template & Print

Step	Action
13.	Open CMS Report merge.dot
14.	On the Mail Merge toolbar (left end), click the Open Data Source  icon. The Select Data Source navigation box opens.
	If the Mail Merge toolbar doesn't open automatically, go to View, Toolbars, and then click Mail Merge.
15.	Navigate to and open the Excel file containing the course data.
16.	In the Select Table box, click OK.
17.	On the Mail Merge toolbar, click the View Merged Data  icon.
18.	Click the Merge to Printer  icon. The Merge to Printer box opens.
19.	Click OK. The Print dialog box opens.
20.	Make sure the printer is ready to print, and click OK. Your forms will print.
	If a message appears saying that the margins are outside the printable area, click Yes.
21.	If any of the courses you are submitting is a Contract/Grant Course, once the forms are printed, manually fill in the corresponding fields in the Contract/Grant Courses text box (lower left corner).
22.	Follow the signature process as per your college's procedure.

SECTION 5: Enter Data to Word Template

If you want to fill in the Word form one course at a time, without using the Excel spreadsheet and the mail merge process:

Step	Action
1.	Open CMS Report non-merge.dot
2.	Fill out the necessary fields.
	Refer to section on each field for details.
	Tab across each row of fields to move from one field to another. To get to a new row of fields, click in the first field of that row.
3.	Save the file if you want a copy for your records.
4.	Click the Print  icon. (Make sure the printer is ready to print.) Your forms will print.
5.	If a message appears saying that the margins are outside the printable area, click Yes.
6.	If any of the courses you are submitting is a Contract/Grant Course, once the forms are printed, manually fill in the corresponding fields in the Contract/Grant Courses text box (lower left corner).
7.	Follow the signature process as per your college's procedure.

SECTION 6: Fill Out the CSM Form Fields

Name of Field:	Run
What to put in this field:	Type 1 for first run, 2 for second run, 3 for third run, or C for continual updates.
Notes on this field:	Continual updates occur after the final run to produce the printed Schedule of Classes.
Name of Field:	Term
What to put in this field:	Examples: Summer 2008 = 200830 Fall 2008 = 200910 Spring 2009 = 200920
Notes on this field:	<p>Refer to the <i>Determining a Term Code Quick Guide</i> for details on Term Codes.</p> <p>The Term field is a six digit code that is comprised of four digits for the year followed by two digits for the semester or term. The semesters are indicated as Fall = 10, Spring = 20, Summer = 30. The first four digits, representing the year, are based on the Fiscal Year which begins July 1st and ends June 30th of the following year. Fiscal Years are recorded as the second half of that period. For example, September 2008 (Fall) is part of Fiscal Year 2009. Thus the Term code would be 200910.</p> <p>NOTE: Grant or Contract courses must not begin until after the contract has been approved in writing and reference number has been issued. Courses that start too late for the current term may have to be submitted for a future term. Contact the Registration Office for additional information.</p>

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Part of Term								
What to put in this field:	<table border="1"> <thead> <tr> <th>Code</th> <th>Term</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Fall, Spring or 13 week Summer Session</td> </tr> <tr> <td>IA</td> <td>First 6 ½ week Summer Session</td> </tr> <tr> <td>II</td> <td>Second 6 ½ week Summer Session</td> </tr> </tbody> </table>	Code	Term	1	Fall, Spring or 13 week Summer Session	IA	First 6 ½ week Summer Session	II	Second 6 ½ week Summer Session
Code	Term								
1	Fall, Spring or 13 week Summer Session								
IA	First 6 ½ week Summer Session								
II	Second 6 ½ week Summer Session								
Name of Field:	Type of Action								
What to put in this field:	Type Add, Change, or Cancel								
Notes on this field:	<p>A change is defined as adjustment for a course section which already exists. It could be a change in meeting information, instructor or seating capacity.</p> <p>A 'cancel' is defined as a course section that will not be offered a specific semester.</p>								
Name of Field:	If Change/Cancel: WHY?								
What to put in this field:	If the course is being cancelled or changed indicate the reason for the change or cancellation.								
Notes on this field:	Per Academic Affairs, once the course has been added, departments must note why the course is being changed or cancelled. CSM Reports that do not list this information will be returned by Academic Affairs. For a change, complete the course and section # fields, and then complete only the fields for which information has changed (i.e.: do not fill in the meeting information if only the instructor has changed.) There are many reasons a course section may be cancelled. For example, low enrollment, no instructor available to teach. This is a 30 character field including blank spaces.								

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Subject
What to put in this field:	<p>The subject is part of the identifier for the course. It is not necessarily the same as the department although it could be.</p> <p>For example, the subject for English is ENGL, which also happens to be the department abbreviation. The subject for Elementary Education is ELED.</p>
Notes on this field:	Refer to the <i>Course Identifier Crosswalk</i> .
Name of Field:	Course #
What to put in this field:	<p>Enter the course number as it appears in the Course Catalog.</p> <p>For example, for SOC 320C, the course number is 320C.</p>
Notes on this field:	<p>The course must be in the Banner Catalog in order for the course to be available for students to register and receive grades.</p> <p>For sections offered for Honors credit, a new subject beginning with a 'Z' will be created by Academic Affairs. For example; ZART for Honors credit n Art.</p>
Name of Field:	Section #
What to put in this field:	<p>Begin with section 1 (one) for the first section of a course that is offered and continue to assign ascending numbers to each additional section of the course. For example, ENGL 101 has 40 sections. They would be numbered 1 – 40. Unique section numbers must be assigned to specific kinds of courses as listed below. In some situations several codes may be used for one section. E.G. WL1, Weekend Institute meeting at El Centro. (See next page.)</p>

SECTION 4 - FILL OUT THE CSM FORM FIELDS

	Code	Section
	A#	Study Abroad course sections
	C#	Contract course sections
	E#	International Student Exchange
	G#	Grant course sections
	J#	Jacob Carruthers Center Inner City Studies
	L#	El Centro
	S#	Summer Transition
	W#	Weekend Institute
	X#	Extension course sections

Name of Field:	Instructor's ID
What to put in this field:	<p>For faculty members who already have an ID number, enter the number with leading zeros to equal nine characters.</p> <p>New instructors must be entered into the Banner system as a faculty member by Academic Affairs in order to create an ID number. HR notifies Academic Affairs after the contract has been approved and processed.</p>
Notes on this field:	<p>This information must be entered for each instructor teaching a course section. For example, a course with a lecture and a lab may be taught by two instructors. The specific ID number must be indicated for each instructor. Do not enter social security numbers in this field.</p> <p>If the instructor has not yet been identified as faculty or an instructor has not yet been assigned to teach the class, enter 539786, Instructor TBA in the instructor's ID field.</p> <p>If entering TBA, an updated CSM Report must be submitted to change the TBA assignment to the valid instructor of record by the 10th day of the term.</p>

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Instructor's Name
What to put in this field:	Enter the correct spelling of the instructor's name. The format is Last Name, First Name.
Notes on this field:	This information must be entered for each instructor teaching a course section.
Name of Field:	2nd Instructor's ID 2nd Instructor's Name 3rd Instructor's ID 3rd Instructor's Name
What to put in this field:	Refer to instructions for Instructor's ID and Instructor's Name above.
Name of Field:	Seating Capacity
What to put in this field:	Enter the seating capacity of the course section.
Notes on this field:	The seating capacity must be entered for all course sections, including those that require department approval. Never use a '0', zero for capacity.
Name of Field:	International Course/Weekend Institute
What to put in this field:	Enter STAB for Study Abroad program sections; EXCH for International Student Exchange Program sections; INEX for International Experience program sections. For Weekend Institute course sections, enter the appropriate code from the list below: <ul style="list-style-type: none"> • WIPE Pre Education • WIPP Pre Education/Professional Studies • WIPS Professional Studies • NWIP Non Weekend Institute courses meeting Saturday, Sunday or after 4pm on Friday.

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Notes on this field:	<p>The Study Abroad program is defined as those programs in which students register for and attend courses entirely at an institution outside the United States. These students will complete course equivalency forms with Northeastern to obtain credit.</p> <p>The International Experience program is defined as those programs in which course sections are sponsored by NEIU and students register only at NEIU, but the course sections are conducted outside the United States. These course sections are considered on campus sections because the out of country experience is brief.</p> <p>The International Student Exchange program is defined as those programs in which NEIU has established formal partnerships with universities outside the United States.</p>										
Name of Field:	Print in Schedule?										
What to put in this field:	Indicate 'NO' only if the course is not to be listed in the printed Schedule of Classes or on the Self Service webpages. Some examples of course sections that may be excluded are; tutored and Independent studies, thesis seminars, and private music lessons.										
Name of Field:	Session										
What to put in this field:	<table border="1"> <thead> <tr> <th data-bbox="751 1415 919 1451">Code</th> <th data-bbox="927 1415 1317 1451">Session</th> </tr> </thead> <tbody> <tr> <td data-bbox="751 1457 919 1486">D</td> <td data-bbox="927 1457 1317 1486">8:00a.m. – 3:50 p.m.</td> </tr> <tr> <td data-bbox="751 1493 919 1522">E</td> <td data-bbox="927 1493 1317 1522">4:00p.m. – 9:50 p.m.</td> </tr> <tr> <td data-bbox="751 1528 919 1558">S</td> <td data-bbox="927 1528 1317 1558">Saturday, anytime</td> </tr> <tr> <td data-bbox="751 1564 919 1593">U</td> <td data-bbox="927 1564 1317 1593">Sunday, anytime</td> </tr> </tbody> </table>	Code	Session	D	8:00a.m. – 3:50 p.m.	E	4:00p.m. – 9:50 p.m.	S	Saturday, anytime	U	Sunday, anytime
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U	Sunday, anytime										
Notes on this field:	Should the course section change from day to evening or week day to Saturday, the session must be changed.										

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Meet Time Code												
What to put in this field:	<p>Refer to the <i>Meet Time Code Chart</i> for the appropriate campus to determine the meet code.</p> <p>If there is a time pattern that is not identified for the specific campus, enter the time and day. Academic Affairs will determine if this is a valid meeting time.</p> <p>Course sections that have more than one meeting time or separate meeting sessions must have a Meet Code for each meeting time or session.</p> <p>Course sections that are considered 'Hours Arranged' should have the time entered as 'TBA'.</p>												
Notes on this field:	<p>This code represents the time the course meets. There are pre-determined meet codes identified for the Main Campus, El Centro, and CCICS. Main Campus course sections can not use Meet Codes designated for El Centro or CCICS.</p>												
Name of Field:	Campus												
What to put in this field:	<table border="1" data-bbox="743 1304 1386 1528"> <thead> <tr> <th>Code</th> <th>Campus</th> </tr> </thead> <tbody> <tr> <td>CIS</td> <td>Carruthers Center for Inner City St</td> </tr> <tr> <td>CTC</td> <td>Chicago Teachers Center</td> </tr> <tr> <td>EC</td> <td>El Centro</td> </tr> <tr> <td>MC</td> <td>Main Campus</td> </tr> <tr> <td>OFF</td> <td>Off Campus/Extensions</td> </tr> </tbody> </table> <p>If the course section is meeting Off Campus and is not a satellite of Northeastern Illinois University enter OFF as the campus. For example a course section meeting at the College of Lake County would have 'OFF' entered in the Campus field.</p>	Code	Campus	CIS	Carruthers Center for Inner City St	CTC	Chicago Teachers Center	EC	El Centro	MC	Main Campus	OFF	Off Campus/Extensions
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SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Building																																
<p>What to put in this field:</p>	<p>Leave the building field blank unless the course section has a dedicated classroom. Course sections with a dedicated classroom that have more than one meeting time or separate meeting sessions must have the Building entered for each session.</p> <p>Department chairs will be notified by their deans if the room field is to be entered for specific sections. Questions should be directed to the appropriate dean.</p> <table border="1" data-bbox="743 709 1328 1465"> <thead> <tr> <th>Code</th> <th>Building</th> </tr> </thead> <tbody> <tr> <td>B</td> <td>Building B</td> </tr> <tr> <td>C</td> <td>Building C</td> </tr> <tr> <td>CBM</td> <td>College of Bus. & Mngt.</td> </tr> <tr> <td>CH</td> <td>Child Care Center</td> </tr> <tr> <td>CIS</td> <td>Carruthers Center Inner City Studies</td> </tr> <tr> <td>CTC</td> <td>Chicago Teachers Center</td> </tr> <tr> <td>E</td> <td>Building E</td> </tr> <tr> <td>EC</td> <td>EI Centro</td> </tr> <tr> <td>F</td> <td>Building F</td> </tr> <tr> <td>FA</td> <td>Fine Arts Center</td> </tr> <tr> <td>J</td> <td>Building J</td> </tr> <tr> <td>LIB</td> <td>Ronald Williams Library</td> </tr> <tr> <td>LWH</td> <td>Lech Walesa Hall (use beginning with Summer 2010)</td> </tr> <tr> <td>PE</td> <td>Physical Education Complex</td> </tr> <tr> <td>SCI</td> <td>Science Building</td> </tr> </tbody> </table>	Code	Building	B	Building B	C	Building C	CBM	College of Bus. & Mngt.	CH	Child Care Center	CIS	Carruthers Center Inner City Studies	CTC	Chicago Teachers Center	E	Building E	EC	EI Centro	F	Building F	FA	Fine Arts Center	J	Building J	LIB	Ronald Williams Library	LWH	Lech Walesa Hall (use beginning with Summer 2010)	PE	Physical Education Complex	SCI	Science Building
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SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Room																																		
What to put in this field:	Leave the room field blank unless the course section has a dedicated classroom. Course sections that have a dedicated classroom with more than one meeting time or separate meeting sessions must have the room entered for each session. Department chairs will be notified by their deans if the room field is to be entered for specific sections. Questions should be directed to the appropriate dean.																																		
Notes on this field:	If the course section is meeting Off Campus and is not a satellite of Northeastern Illinois University, enter the room designation. For example a course section meeting at the College of Lake County would have UCGL entered in the room field.																																		
Name of Field:	Schedule Type																																		
What to put in this field:	<table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>DI</td> <td>Discussion/Quiz</td> </tr> <tr> <td>FE</td> <td>Field Experience</td> </tr> <tr> <td>HY</td> <td>Hybrid</td> </tr> <tr> <td>IN</td> <td>Independent Study</td> </tr> <tr> <td>IT</td> <td>Internship</td> </tr> <tr> <td>LA</td> <td>Lab</td> </tr> <tr> <td>LE</td> <td>Classroom Lecture</td> </tr> <tr> <td>MP</td> <td>Master's Project</td> </tr> <tr> <td>OL</td> <td>Online</td> </tr> <tr> <td>PR</td> <td>Practicum</td> </tr> <tr> <td>PT</td> <td>Practice Teaching</td> </tr> <tr> <td>SD</td> <td>Studio</td> </tr> <tr> <td>ST</td> <td>Student Teaching</td> </tr> <tr> <td>TS</td> <td>Thesis Seminar</td> </tr> <tr> <td>TU</td> <td>Tutored Study</td> </tr> <tr> <td>VC</td> <td>Video Conferencing</td> </tr> </tbody> </table>	Code	Description	DI	Discussion/Quiz	FE	Field Experience	HY	Hybrid	IN	Independent Study	IT	Internship	LA	Lab	LE	Classroom Lecture	MP	Master's Project	OL	Online	PR	Practicum	PT	Practice Teaching	SD	Studio	ST	Student Teaching	TS	Thesis Seminar	TU	Tutored Study	VC	Video Conferencing
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ST	Student Teaching																																		
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Notes on this field:	The course section can only be identified by one schedule type. And, the schedule type must exist on the course in the Banner Catalog.																																		

SECTION 4 - FILL OUT THE CSM FORM FIELDS

	<p>Hybrid courses (also called blended courses) combine face-to-face sessions with online sessions. At least 20% of class sessions in hybrid courses will take place online.</p> <p>Online courses at NEIU are those courses in which all of the classroom instruction is delivered online, usually through the Blackboard Learning Management System. Online classes may require a face-to-face orientation at the beginning of the semester and may require that students travel to a location to take tests.</p> <p>Videoconference courses use live face-to-face classes taught at two or more locations at the same time using two-way video and audio technology. Students and their professor speak with each other as though they were in the same classroom.</p> <p>In order to identify a course with one of the above codes, the course must have the code listed on the Banner Catalog.</p>
Name of Field:	Bill Code
What to put in this field:	Do not use. This field is not applicable in Banner.

SECTION 4 - FILL OUT THE CSM FORM FIELDS

Name of Field:	Department Approval
What to put in this field:	Indicate 'Yes' if department approval is required to register for the course.
Notes on this field:	A departmental approval code will be assigned to sections of courses in which there are non-course, non-major, or non-student restrictions. In addition, this code can be used for course sections that require consent of instructor.
Name of Field:	Sections Comments
What to put in this field:	Indicate any additional information that should appear in the printed Schedule of Classes or the On Line Schedule in Self Service. Do not enter course or test prerequisites. If these are already listed on the Banner Catalog they will automatically be displayed in the printed and online schedule of classes.
Notes on this field:	<p>Comments may include but are not limited to:</p> <ul style="list-style-type: none"> • a specific room location to obtain authorization, • the actual meeting dates of grant or contract course sections, • the contact person for grant or contract course sections. <p>This is a 30 character field including blank spaces.</p>
Name of Field:	Course Reference Number (CRN)
What to put in this field:	<p>Enter the CRN for all course changes. This includes changes in meeting time, location (building, room, campus), instructor, schedule type etc.</p> <p>Enter the CRN for all courses that are being cancelled.</p>

SECTION 7: Job Aids List

Job aids can be found at <http://www.neiu.edu/~neiutrng>.

- CSM Information Sheet
 - Part of Term Codes
 - Section # Codes
 - Session Codes
 - Campus Codes
 - Building Codes
 - Schedule Type Codes
- Determining a Term Code Quick Guide
- Course Identifier Crosswalk
- Meet Time Code Chart
 - for Main Campus
 - for CCICS
 - for El Centro