

# EMORY



## OPUS Staff Training Manual

*Records Tab: Enrollment  
Add / Drop / Swap / Edit*





## Enrollment Folder

Quick links to OPUS features are found in folders on the Records tab. The folder contents are grouped so that users may find related functions easily. Let's start at the right side of the page and take a look at the Enrollment folder. Each of the links below are chaptered in this document.



### Enrollment

[Add / Drop / Swap / Edit](#)

[View Student Schedule](#)

[View Schedule Log - by student](#)

[Process Block Enrollment](#)

[Maintain Service Indicators](#)



## Quick Enroll – Search Screen

After clicking the Add/Drop/Swap/Edit link on the Records Tab, a SEARCH page appears. All values on this screen must be populated before clicking ADD.

Favorites | Main Menu > Records and Enrollment > Enroll Students > Quick Enroll a Student

### Quick Enroll a Student

Find an Existing Value | **Add a New Value**

**Every enrollment action must be done as a ADD (never use "Existing Value")**

ID:  1 Enter the student's id or click the magnifying glass to do a lookup

Academic Career:  2 Enter the student's academic career like "UCOL" or "PUBH" or click the magnifying glass to do a lookup

Academic Institution: EMORY 3 Academic Institution is always EMORY

Term:  4 Enter the term code like "5149" or do a lookup

**Add** 5



## Add/Drop/Swap/Edit

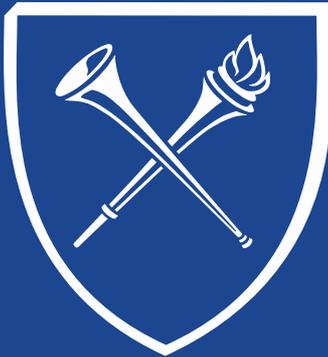
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The Add/Drop/Swap/Edit link allows the user to use the Quick Enroll function to perform multiple enrollment actions in OPUS.

***Please note:***

- ❖ *Access to perform enrollment actions for a term end for most staff after the last day of drop/add for the term.*
- ❖ *School administrators may have extended access to perform enrollment actions on behalf of their school until the last day of the term.*
- ❖ *After a term ends, only staff within the Office of the Registrar can perform enrollment actions. Requests for enrollment actions must be submitted using a grade change form or by memo from a senior school official.*

Enrollment actions are governed by compliance guidelines and may be subject to the Registrar's review and final approval.



## Enrollment Actions

After logging into a student's record in Quick Enroll, the user will see several tabs along the top of the page. Each tab contains data elements that may be needed depending on the enrollment action being completed.

Click each tab to view the features available enrollment options.

**Quick Enrollment**

Request ID: 0000000000    James Wayne Dooley    ID: 0022365  
 Career: Ugrad Coll    Institution: Emory Univ    Term: Spr 2015   

Class Enrollment   Units and Grade   Other Class Info   General Overrides   Class Overrides

*Action	Class Nbr	Section	Related 1	Related 2
Enroll			Pending	

Clicking this icon expands the tabs to a single listing for easy access to the available features.

*Action	Class Nbr	Section	Related 1	Related 2	Unit Taken	Course Count	Grade Base	Grade Input	Requirement Designation	Requirement Designation Option	RD Grade	Permission	Drop if Enroll	Ind Study Instructor	Action Reason
Enroll			Pending		0.00					No					

Appointment	Time Conflict	Action Dt	Career	Requisites	Closed Class	Class Links	Grading Basis	Class Permission	WaitList Pos
<a href="#">Create Transcript Note</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">WaitList Pos</a>



## Enrollment Action – Add Class Enrollment Tab

When enrolling a student in a class, the ACTION could be Enroll or Swap.

Let's take a quick look at enrolling a student.

1. Under **Action** choose **Enroll** and the **Class Nbr** (if you don't know the class number, you can click the magnifying glass and do a class search. Classes that require a related component such as non-credit lab or discussion are entered under the **Related 1** option.

### Quick Enrollment

**Request ID:** 0000000000    **James Thomas Dooley Jr. Jr.**    **ID:** 0022365  
**Career:** Ugrad Coll    **Institution:** Emory Univ    **Term:** Spr 2011    Submit

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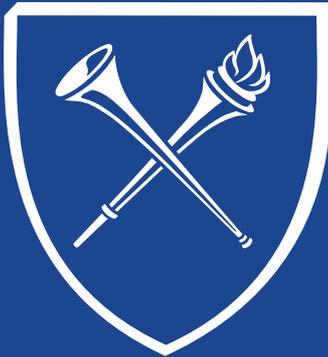
Class Enrollment | Units and Grade | Other Class Info | General Overrides | Class Overrides | PDF

+	-	*Action	Class Nbr	Section	Pending	Related 1	Related 2
		Enroll	3097				

If class requires a lab, enter here

Go to: [View Enrollment Access](#) | [Calculate Tuition](#) | [Study List](#) | [Enrollment Appointments](#) | [Term/Session Withdrawal](#) | [Student Services Center](#)

Save Add Update/Display



## Enrollment Action – SWAP Class Enrollment Tab

Swap allows you “try out” the new class without the student being dropped or losing their space in a current class.

Under **Action** choose **Swap** and the **Class Nbr** from the schedule that is to be swapped. Next enter the **Change To** class nbr or do a lookup using the magnifying glass to search for the class that is requested. If you need to swap a lab ONLY, enter the class number in the “Class Nbr” field from the schedule and in the **Change To** field. Then enter the lab that the student would like to swap into in the “Related 1” field.

### Quick Enrollment

Request ID: 0000000000    James Thomas Dooley Jr. Jr.    ID: 0022365  
 Career: Ugrad Coll    Institution: Emory Univ    Term: Spr 2011    ★

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Class Enrollment    Units and Grade    Other Class Info    General Overrides    Class Overrides   

*Action	Class Nbr	Change To	Section	Related 1	Related 2
+ - Swap	4114 <input type="text"/>	3097 <input type="text"/>	<a href="#">Latin 370</a>	Pending	<input type="text"/>

Class to Drop

Class to Add

Enter lab if needed

Go to: [View Enrollment Access](#)    [Calculate Tuition](#)    [Study List](#)    [Enrollment Appointments](#)    [Term/Session Withdrawal](#)  
[Student Services Center](#)



## Enrollment Action – Add Units and Grade Tab

The following pages are applicable to both enrolling or swapping classes.

Fixed credit hours cannot be modified, but variable credit hours may be edited during enrollment from the minimum to the maximum allowable hours. Please note: OPUS will always default to the minimum credit hours. Please verify the correct number of hours have been entered for a variable credit class.

In most cases, a student has the option of changing a GRD to SUS.

Applicable requirement designations for Emory Colleges of Arts & Sciences classes is viewable on this page. The applicable GER tag will default to the student's schedule.

### Quick Enrollment

Request ID: 0000000000    James Thomas Dooley Jr. Jr.    ID: 0022365  
 Career: Ugrad Coll    Institution: Emory Univ    Term: Spr 2011    ★

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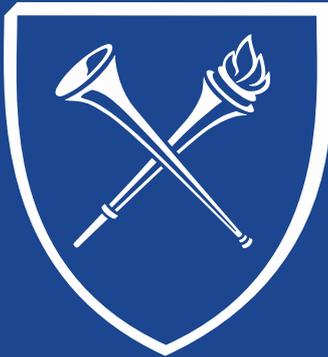
Class Enrollment    **Units and Grade**    Other Class Info    General Overrides    Class Overrides    [...]

	Unit Taken	Course Count	Grade Base	Grade Input	Repeat Code	Requirement Designation	RD Grade Option
+ - <a href="#">Latin 102</a>	4.00	1.00	GRD	<input type="text"/>	<input type="text"/>	HAL	No

Some classes have variable credit units. Check with student if this option is available.

Is this the grading basis the student wants?

Go to: [View Enrollment Access](#)    [Calculate Tuition](#)    [Study List](#)    [Enrollment Appointments](#)    [Term/Session Withdrawal](#)  
[Student Services Center](#)



## Enrollment Action – Add General Overrides Tab

If the term has begun, always use the 1<sup>st</sup> day of the term as your “action date” for enrolling, swapping, and dropping.

If your role allows these override capabilities,

**Do Not:**

- Override “requisites, service indicator, career, requisite, or unit load” unless you are authorized to do so.

**You may:**

- Override “appointment” when appropriate and if you are authorized to do so.

**Quick Enrollment**

Request ID: 000000000 James Thomas Dooley Jr. ID: 0022365 ★

Career: Ugrad Coll Institution: Emory Univ Term: Spr 2011 Submit

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Class Enrollment | Units and Grade | Other Class Info | **General Overrides** | Class Overrides

	Appointment	Unit Load	Time Conflict	Action Date	Action Dt	Requirement Designation	Career	Service Indicator	Requisites
+ - Latin 102	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Action date is 1/20/11

Go to: [View Enrollment Access](#) [Calculate Tuition](#) [Study List](#) [Enrollment Appointments](#) [Term/Session Withdrawal](#)  
[Student Services Center](#)

Save Add Update/Display



## Enrollment Action – Add Class Overrides Tab

If your role allows these override capabilities,

**Do Not:** Override “Closed Class, Class Units, Grading Basis, Class Permission or WaitList Pos” unless you understand the consequences and are authorized to do so.

**Never:**

Override “Class Links.”

### Quick Enrollment

Request ID: 0000000000    James Thomas Dooley Jr.    ID: 0022365  
 Career: Ugrad Coll    Institution: Emory Univ    Term: Spr 2011    ★

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**Class Overrides**

	<u>Closed Class</u>	<u>Class Links</u>	<u>Class Units</u>	<u>Grading Basis</u>	<u>Class Permission</u>	<u>WaitList Pos</u>
+ - <a href="#">Latin 102</a>	<input type="checkbox"/>	<a href="#">WaitList Pos</a>				

Click here to change grading basis

Only if permission number or letter is provided.

Go to: [View Enrollment Access](#)   [Calculate Tuition](#)   [Study List](#)   [Enrollment Appointments](#)   [Term/Session Withdrawal](#)  
[Student Services Center](#)



## Enrollment Action – Completed

Click the Submit button to complete the process for enrolling or swapping.



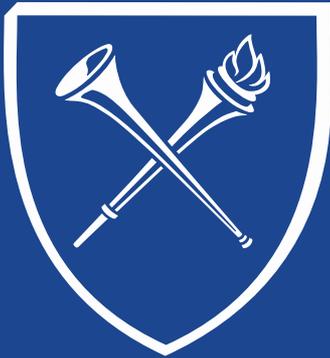
- “**Success**” or “**Messages**” indicate the class has been successfully added or swapped.
- “**Error**” indicates the process was unsuccessful. Click the error link to view why the action was unsuccessful. If you are unable to resolve the issue, please feel free to contact the registrar’s office.

▼ Error Messages		
<b>Message Sequence:</b> 1	<b>Severity:</b> Error	<b>Last Update DateTime:</b> 04/01/03 1:29:25PM
Permission to enroll in this class is required. (14640,133) The class falls outside of the career of study.		



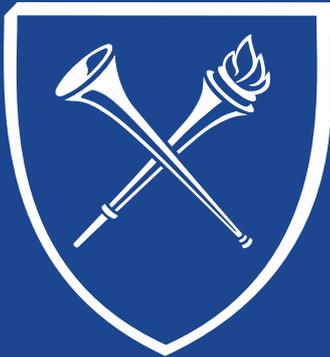
## Enrollment Action – Sample Error Messages

Message	Description	Override
Student Already Enrolled in Class, Add Not Processed	The enrollment request was not processed; the student is already enrolled in the class for the specified term. Verify class number and term, and resubmit the request	None
Student Not Enrolled, Class (XX) Full	The requested enrollment add was not processed. The enrollment limit for the specified class has been reached.	Class Limit
Unable To Drop Class, Will Put Student Below Minimum Units	The requested drop transaction was not processed. Dropping the class would put the student below the minimum units required for enrollment.	Unit Load
Time Scheduling Conflict, Student Not Enrolled In Class	The class the student is attempting to enroll in has a scheduling conflict with an existing class the student is already enrolled in. Either select another class, or override the time conflict.	Time Conflict



## Enrollment Action – Sample Error Messages

Maximum Term Student Unit Load Exceeded	Add transaction not processed. The student maximum term unit load would be exceeded.	Unit Load
Enrollment Is Not Allowed For This Class: It Is Outside the Student's Career of Study	The Add transaction was not processed. The student's academic career is not valid for the class.	Career
The Student is Already Enrolled in the 'To' Class of the Swap Transaction, Swap Not Processed	The student is already enrolled in the 'To' class of the swap transaction. The swap transaction was not processed.	None
(XX) to Enroll in Class, Add Not Processed.	Consent is needed to enroll in the class. The add transaction was not processed.	Override Permission Nbr



## DROP!

## Enrollment Action – Drop Class Enrollment Tab

When dropping a student from a class, the ACTION would be **Drop**.

You can enter the **Class Nbr** or you can choose the magnifying glass and select the class to be dropped from the schedule. Click **Submit** to complete the process.

### Quick Enrollment

Request ID: 0000000000    James Thomas Dooley Jr. Jr.    ID: 0022365  
 Career: Ugrad Coll    Institution: Emory Univ    Term: Spr 2011

★ 

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Class Enrollment    Units and Grade    Other Class Info    General Overrides    Class Overrides    

*Action	Class Nbr	Section	Related 1	Related 2
<input type="button" value="+"/> <input type="button" value="-"/> <b>Drop</b> ▼	4114		Pending	

Go to: [View Enrollment Access](#)    [Calculate Tuition](#)    [Study List](#)    [Enrollment Appointments](#)    [Term/Session Withdrawal](#)  
[Student Services Center](#)



## Enrollment Action – Drop Class Enrollment Tab

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If the term has not begun, simply drop the class. The class will be removed from the schedule.

If the class is dropped between the 1<sup>st</sup> day of the term and the end of the drop/add, the class will be removed from the schedule. However, the class enrollment record will be retained for historical purposes in the enrollment table for up to 2 years. Because of this retention, students who are dropped from all classes after the 1<sup>st</sup> day of class can no longer be admission revoked.

*For those who have extended access to drop classes:*

- After drop/add has ended, any drops will automatically record a “W” grade on the student’s record.
- Users who believe there is a valid reason why a class should be removed from a student’s schedule after drop/add has ended, should contact the Office of the Registrar ([registr@emory.edu](mailto:registr@emory.edu)) for guidance.



## Enrollment Action – Edit Normal Maintenance

There are times when you need to make an adjustment to a student's enrollment such as changing the grading status or credit hours for a class. You would perform this using the **Normal Maintenance** action.

Quick Enrollment

Request ID: 0000000000    Institution: Emory Univ    Term: Spr 2014   

Class Enrollment	Units and Grade	Other Class Info	General Overrides	Class Overrides
+	Norm Maint	14452	Request 101	000 Pending

Enter the Class Number you want to change - here, click the magnifying glass to see the enrollments to choose the class

Go to: [View Enrollment Access](#)   [Calculate Tuition](#)   [Study List](#)   [Enrollment Appointments](#)   [Term/Session Withdrawal](#)

Quick Enrollment

Request ID: 0000000000    Institution: Emory Univ    Term: Spr 2014   

Class Enrollment	Units and Grade	Other Class Info	General Overrides	Class Overrides
+	Request 101	3.00	1.00 GRD	HSC

Change grade status here

Go to: [View Enrollment Access](#)   [Calculate Tuition](#)   [Study List](#)   [Enrollment Appointments](#)   [Term/Session Withdrawal](#)

Click **Submit** to apply the changes.

# EMORY



## OPUS Staff Training Manual

*Records Tab: Enrollment*  
*View Student Schedule*





## View a Student's Schedule – Search Screen

After clicking the [View Student Schedule](#) link on the Records Tab, a SEARCH page appears for the Enrollment Summary in OPUS. Enter the student id or last name/first name. The search results will include all terms and careers of enrollment for the student requested. Click the appropriate enrollment term to view the schedule.

Enrollment Summary

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

[Find an Existing Value](#)

**Search Criteria**

ID:  begins with

Academic Career:  =

Academic Institution:  begins with  EMORY

Term:  =

Campus ID:  begins with

National ID:  begins with

Last Name:  begins with

First Name:  begins with

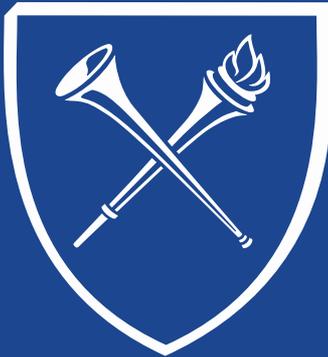
Term Alternate Key:  =

[Basic Search](#)

**Search Results**

[View All](#) First 1 of 9 Last

ID	Academic Career	Academic Institution	Term	Short Description	Name	Gender	Date of Birth	Campus ID	National ID	National ID	Country	NID	Short Description	Last Name	First Name	Term Alternate Key
<a href="#">Ugrad Coll</a>	EMORY	EMORY	5151	Spr 2015		Male			*****	USA	SSN					
<a href="#">Ugrad Coll</a>	EMORY	EMORY	5149	Fall 2014		Male			*****	USA	SSN					
<a href="#">Ugrad Coll</a>	EMORY	EMORY	5146	Sum 2014		Male			*****	USA	SSN					
<a href="#">Ugrad Coll</a>	EMORY	EMORY	5141	Spr 2014		Male			*****	USA	SSN					
<a href="#">Ugrad Coll</a>	EMORY	EMORY	5139	Fall 2013		Male			*****	USA	SSN					
<a href="#">Ugrad Oxd</a>	EMORY	EMORY	5131	Spr 2013		Male			*****	USA	SSN					
<a href="#">Ugrad Oxd</a>	EMORY	EMORY	5129	Fall 2012		Male			*****	USA	SSN					
<a href="#">Ugrad Oxd</a>	EMORY	EMORY	5121	Spr 2012		Male			*****	USA	SSN					
<a href="#">Ugrad Oxd</a>	EMORY	EMORY	5119	Fall 2011		Male			*****	USA	SSN					



## View Student Schedule

The enrollment summary for the chosen term appears. Please notice the dark blue line on the page. In our example below, the student's enrollment summary is on multiple screens (1-3 of 6).



To see the full schedule, click the **view all** link on this line. To print a copy of the schedule, click **Print Study List**. Notice that "saved" briefly appears in the upper right side of the page.

Term: Fall 2014 Career: Ugrad Coll Emory University [Print Study List](#) [Report Manager](#)

Class Nbr	Subject	Catalog	Session	Section	Status	Status/Reason	Acad Prog	Grading Basis	Units Taken
2988	ENVS	344	Regular	000	Enrolled	Enrolled	LIBAS	Graded	3.00
	American Environmental History		Lecture						
8216	ENVS	390R	Regular	00P	Enrolled	Enrolled	LIBAS	Graded	2.00
	Sem On Environmental Issues		Lecture						
5999	ENVS	442W	Regular	000	Enrolled	Enrolled	LIBAS	Graded	5.00
	Ecology of Emory Univ w/lab		Lecture						
6147	ENVS	442W	Regular	LB1	Enrolled	Enrolled	LIBAS	Non-Graded	
	Ecology of Emory Univ w/lab		Laboratory						
4267	PHYS	141	Regular	001	Enrolled	Enrolled	LIBAS	Graded	4.00
	Intro Physics I W/Lab		Lecture						
7534	PHYS	141	Regular	LC4	Enrolled	Enrolled	LIBAS	Non-Graded	
	Intro Physics I W/Lab		Laboratory						

Find | View 3 First 1-6 of 6 Last

[Return to Search](#) [Previous in List](#) [Next in List](#)



## View Student Schedule

Now click **Report Manager**. To monitor the process for the printing, click the **Refresh** button on this page. When the document is ready to print, the **Status** will be **POSTED** and the **Details** link will appear.

Administration Archives

View Reports For

User ID: BHERRIN Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Select	Report ID	Prca Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	6181395	6755830	Individual Student Study Rpt	11/10/2014 2:53:34PM	Acrobat (*.pdf)	Posted	Details

Click the **Individual Student Study Rpt** link under **Description** to print the document.

Report ID: SRSTDTN2 STUDY LIST Page No. 1  
 Run Date: 11/10/2014  
 Run Time 14:53:50

Class No.	Subject	Catalog	Session	Section	STATUS	Units Taken	Grading
2988	ENVS American Environmental History	344	1	000 Lecture	Enrolled	3.00	Graded
	Mathematics and Science Center N304			MWF 12:0000 - 12:3000			Allitt, Patrick Nicholas Hopkins, William Hays
8216	ENVS Sem On Environmental Issues	390B	1	00P Lecture	Enrolled	2.00	Graded
	Mathematics and Science Center N306			M 4:0000 - 5:3000			Kiron, Uriel D
5999	ENVS Ecology of Emory Univ w/Lab	442M	1	000 Lecture	Enrolled	5.00	Graded
	Mathematics and Science Center N306			TTh 1:0000 - 2:1500			Wegner, John F.
6147	ENVS Ecology of Emory Univ w/Lab	442M	1	LB1 Laboratory	Enrolled	0.00	Non-Graded
	Mathematics and Science Center M307C			T 2:3000 - 5:3000			Wegner, John F.
7534	PHYS Intro Physics I W/Lab	141	1	LC4 Laboratory	Enrolled	0.00	Non-Graded
	Mathematics and Science Center M204			M 6:3000 - 9:3000			Eng, Thomas Joseph Donofrio, Cordell James
4267	PHYS Intro Physics I W/Lab	141	1	00L Lecture	Enrolled	4.00	Graded
	Goodrich C. White Hall 208			MWF 10:0000 - 10:5000			Eng, Thomas Joseph

# EMORY



## OPUS Staff Training Manual

*Records Tab: Enrollment  
View Schedule Log – By Student*





## View Schedule Log – by student – Search Screen

There may be times when a user may want to view when and who made enrollment changes on a student's schedule. This link will provide a history of enrollment actions for a particular student and term. The link takes the user to the [Enrollment Request Search](#) page.

Enter **Academic Institution = Emory** and click **SEARCH**.

**Enrollment Request**

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

[Find an Existing Value](#)

▼ Search Criteria

Academic Institution: begins with ▼ emory 🔍

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)



## View Schedule Log – by student – Search Screen

After entering the institution, a search page with multiple options appears. In the example below, the Academic Career was – Undergraduate Emory College, the term 5149, and the emplid of the student. There are several search options in this panel. The user can search by **Emplid** of student, **User Id** of the person who performed the actions (for example: sharr13), and **Class Nbr.** CLICK the **SEARCH** button.

The results will appear below the request.

Favorites | Main Menu > Records and Enrollment > Enroll Students > Enrollment Request Search

### Enrollment Request Search

Academic Institution: EMORY Emory University

Academic Career: Undergraduate Emory College

Term: 5149

Enrollment Request ID:

Enrollment Request Source:

Enrollment Request Action:

Enrollment Action Reason:

User ID:

Empl ID:

Class Nbr:

Refresh Previous Search Result:

**Enrollment Action Range**

From Date:

End Date:

**Last Update Range**

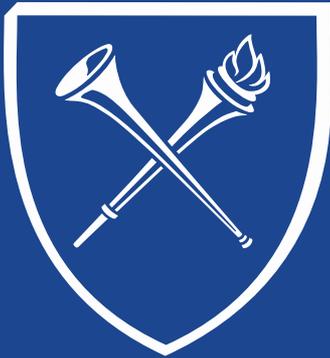
From DateTime:

Thru DateTime:

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▼ Enrollment List Personalize | Find | First 1-19 of 19 Last

Fields 1-7	Fields 8-11	Fields 12-19	Fields 20-25	Fields 26-30	Fields 31-35	
User ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career
1		5149	2882	ENVS	227W	UCOL
2		5149	2988	ENVS	344	UCOL
3		5149	5999	ENVS	442W	UCOL
4		5149	5999	ENVS	442W	UCOL
5		5149	5999	ENVS	442W	UCOL
6		5149	4267	PHYS	141	UCOL
7		5149	2889	ENVS	321	UCOL
8		5149	8216	ENVS	390R	UCOL
9		5149	8216	ENVS	390R	UCOL



## Results View Schedule Log – by student – Search Screen

Click the grid box on the dark blue line of the **Enrollment List** results to export to Excel.



Clicking this icon  expands the tab results for easy viewing.

User_ID	ID	Term	Class Nbr	Subject Area	Catalog Nbr	Academic Career	Enrollment Request ID	Last Update DateTime	Enrollment Request Source	Enrollment Req. Detail Sequence	Enrollment Request Action	Enrollment Action Reason
1		5149	2882	ENVS	227W	UCOL	0003519797	03/24/2014 8:17:41PM	Self-Service Enrollment		1 Enroll	
2		5149	2988	ENVS	344	UCOL	0003519797	03/24/2014 8:17:41PM	Self-Service Enrollment		2 Enroll	
3		5149	5999	ENVS	442W	UCOL	0003519797	03/24/2014 8:17:41PM	Self-Service Enrollment		3 Enroll	
4		5149	5999	ENVS	442W	UCOL	0003519808	03/24/2014 8:18:18PM	Self-Service Enrollment		1 Enroll	

# EMORY



## OPUS Staff Training Manual

*Records Tab: Enrollment  
Process Block Enrollment*



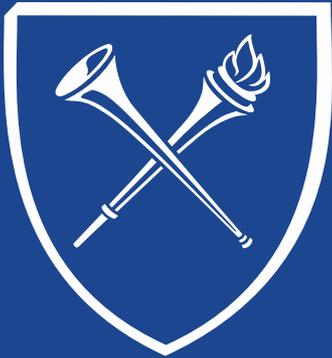


## View Schedule Log – by student – Search Screen

### Introduction

Block Enrollment would be an effective tool to use when making enrollment actions for a select or large group of students into a specific class or into multiple classes. Class changes related to credit hours, grades, grading basis, or Emory College's (GER) General Education Requirements can easily be updated to all enrolled students in a class using the Block Enrollment feature in OPUS. Enrollment actions may include swapping, dropping, or enrolling students. Block enrollment would not be the appropriate tool to use when making specific class changes such as instructor, title, topic, room, or time. The block enrollment process is a better option than Quick Enroll when the entire class or a large group of students will receive the same enrollment action.

Request for class changes in credit hours, GER tag, or grading basis are sent to [DPSTAFF-L@listserv.cc.emory.edu](mailto:DPSTAFF-L@listserv.cc.emory.edu) by departments or schools. Sometimes a department or school will request that a new course be substituted for the currently scheduled one. In this case, the block enrollment feature is used to swap students from the old class to the new class.

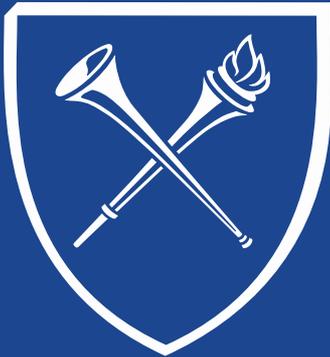


## Creating a Student Block/Class Block with Merge Process

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**Navigation:** [Main Menu](#) > [Records and Enrollment](#) > [Enroll Students](#) > Block Enrollment or Type “Block Enrollment” in search window of Main Menu in OPUS. There are three menu options: Create Class Block, Create Student Block and Block Enroll Merge. This document will review each of these options and how they intersect.

**Tip:** Do not use the browser back arrow when navigating through these panels. Make sure you click the tabs to maneuver between the panels.



# Set Up Block Enrollment

## Create Student Block

1. Click on “Add a New Value”.
2. Enter a name for the Student Enrollment Block. **Remember** this name. Click on the “Add” button.

Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Create Student Block

### Create Student Block

[Find an Existing Value](#) [Add a New Value](#)

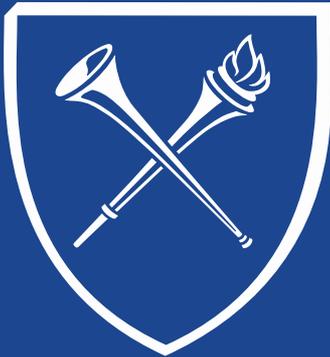
**Academic Institution:**

**Student Enrollment Block:**

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter a name that you will remember for the Student Block. You are limited to 5 characters. This name will become a part of a large list of student block names used by other OPUS users. You may want to write the name down somewhere for easy recall. You will need to know the student block name when you merge the student and class blocks.



## Set Up Block Enrollment

3. Enter a simple description (required).
4. Enter EMPL ID and Career.
5. Click on the “plus sign” to insert Row and enter next EMPL ID. Repeat as necessary.
6. Save

**Tip:** For medium or large classes it is recommended to save periodically after entering several names/career.

Block Enrollment Students

Academic Institution: EMORY Emory University

Student Enrollment Block: TESTN \*Description: Test Student Group Document

Add multiple students by clicking the + and entering emplid and career

*ID	*Academic Career
0022365 James Thomas Dooley Jr.	UCOL Ugrad Coll
<input type="text"/>	UCOL Ugrad Coll
<input type="text"/>	UCOL Ugrad Coll
<input type="text"/>	UCOL Ugrad Coll

Go to: [Add Merge Process](#)

Save Notify Refresh Add Update/Display

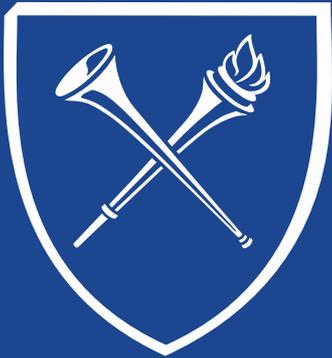


# Set Up Block Enrollment

## Create Class Block

1. Click on “Add a New Value”.
2. Enter a name for Course Enrollment Block. If possible, use the same name as Student Enrollment Block. **Remember** this name. Click on the “Add” button.

The screenshot shows a web browser window with the following breadcrumb trail: Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block. The page title is 'Create Class Block'. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are two input fields: 'Academic Institution:' with 'EMORY' and a search icon, and 'Class Enrollment Block:' with 'TESTN'. A yellow 'Add' button is positioned below the second field. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'. An orange callout box on the right side of the form contains the following text: 'Enter a name that you will remember for the Class Block. If possible, use the same name as the Student Enrollment Block. You are limited to 5 characters. This name will become a part of a large list of class block names used by other OPUS users. You may want to write the name down somewhere for easy recall. You will need to know the class block name when you merge the student and class blocks.'



## Set Up Block Enrollment

---

3. Enter a simple description (required).
4. Set up the course information and actions. Be sure to select any necessary overrides.

### Options for Block Enrollment Actions:

Below are some of the actions most often performed using block enrollment with examples and instructions.

- ✓ **Enrollment**
  - Enter or select term of the action in Term box.
  - Select Enroll as the Action Reason.
  - Enter 4-digit Class Number in Class Nbr box.
  - If the class is Permission Only, click the Class Permission box.
  - If Enrolling students after the Add/Drop/Swap date, click on Action Date box. A new box appears for entering the new date. Use the last day of Add/Drop/Swap for the semester of the enrollment as the Action date.
  - Click SAVE.



### ✓ Enrollment (Screen View)

Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block

### Block Enrollment Classes

Academic Institution: EMORY Emory University  
 Class Enrollment Block: TESTN \*Description: Test Class Group Document Short description is required.

Find | View All First 1 of 1 Last

*Term:	*Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
5129	Enroll	1500	GRD	4.00	1.00		
		<b>Reason Drop if Enroll</b>	<b>Grade In</b>	History Formation Of European Society Fall 2012 Regular Ugrad Coll			

Transcript Note ID: Repeat Code: Instructor ID:

**Overrides**

Access ID: Full Access

Action Date     Career     Class Links     Class Permission     TimeConflict  
 Appointment     Closed Class     Class Units     Service Indicator     Unit Load  
 Dynamic Dates     Grading Basis     Requisites     Wait List Okay

Choose any applicable overrides that will be needed to permit the enrollment.

**Requirement Designation**

Ovrd Requirement Designation

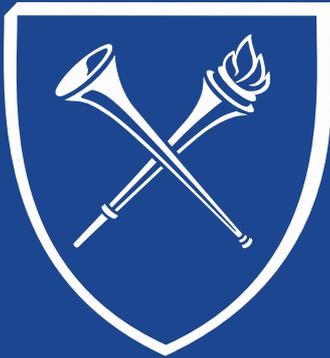
Requirement Designation: HSC History, Society, Cultures

Requirement Designation Option: Requirement Designation Grade:

If you are enrolling after add/drop ends, you will be required to enter an action date of the last date of add/drop for the term of enrollment.

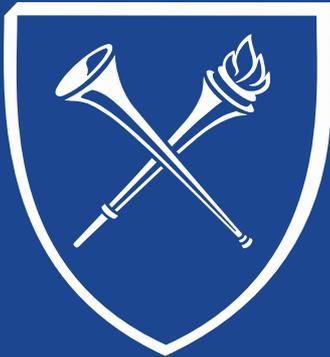
Go to: [Add Merge Process](#) [Class Block Defaults](#)

Use the + when adding multiple classes.



## Set Up Block Enrollment

- ✓ **Dropping Students**
  - Enter or select term of the action in Term box.
  - Select Drop as Action Reason.
  - Enter the 4-digit Class Number in Class Nbr box.
  - If dropping students after the Add/Drop/Swap date, click on the Action Date box. In the new box that appears, use the last day of Add/Drop/Swap for the semester of the drop as the Action date.
  - Click on the Class Permission override for Medical School classes. Most of these classes require permission to drop.
  - For Medical School Only, click on the Unit Load override. When the Medical School drops classes, students may be allowed to be less than full-time. Do not click this override for other schools.
  - Click OK.



### ✓ Dropping Students (Screen View)

Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block

Academic Institution: EMORY Emory University  
 Class Enrollment Block: TESTN \*Description: Test Class Group Document Short description is required.

Find | View All First 1 of 1 Last

*Term:	*Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
5021	Drop	1500	GRD	0.00			

Action Dt: 1/25/12 Reason: [ ] Grade In: [ ] Journalism 301 00P  
 Adv News Reporting & Writing  
 Spr 2002 Regular Ugrad Coll

Transcript Note ID: [ ] Repeat Code: [ ] Instructor ID: [ ]

**Overrides**

Access ID: Full Access

Action Date  Career  Class Links  Class Permission  TimeConflict  
 Appointment  Closed Class  Class Units  Service Indicator  Unit Load  
 Dynamic Dates  Grading Basis  Requisites  Wait List Okay

Requirement Designation

Ovrld Requirement Designation Requirement Designation Option: [ ]  
 Requirement Designation: [ ] Requirement Designation Grade: [ ]

Go to: [Add Merge Process](#) [Class Block Defaults](#)

Save Notify Refresh Add Update/Display

Use the + when adding multiple classes.

Choose any applicable overrides that will be needed to permit the enrollment.

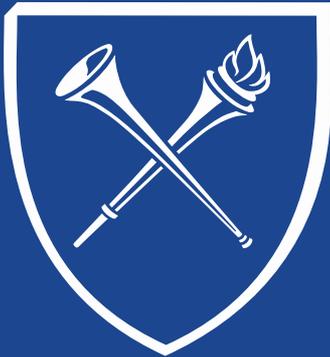
If you are enrolling after add/drop ends, you will be required to enter an action date of the last date of add/drop for the term of enrollment.



## ✓ Swapping Classes

### Tips:

- If the swapping is from a class to be cancelled to a newly created class, the new class must be created.
- Do not cancel the old class before creating a block of students. See the course offering documentation on Maintain Schedule of Classes and Schedule New Course documentation for details on scheduling a class.
- Set the enrollment limit of the old class at “0” to prevent new students from enrolling.
- Print the class roster of the old class before cancelling it. This will give us the grading basis and units for the students.
- If the roster is for a previous semester, the grades will need to be removed. This can be done with the block enroll merge using the Remove Grade action.
- If the students have varying units or grading basis, it may be easier to individually swap students into the class using the Quick Enroll process rather than using the Block Enroll process.
- Enter or select term in the Term box.
- Enter Swap Courses as Action Reason.
- In the top box below Class Nbr Change To, enter the 4-digit number for the old class.
- In the box directly below, enter the 4-digit number for the class to be swapped into.
- If swapping students after the Add/Drop/Swap, click on the Action Date box. Enter the last day of Add/Drop/Swap for the semester of the swap in the Action Date box that appears.
- Click on the Class Permission override box for Permission or Medical School classes.
- Click SAVE.



## ✓ Swapping Classes (Screen View)

Favorites | Main Menu > Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block

### Block Enrollment Classes

Academic Institution: EMORY Emory University  
 Class Enrollment Block: TESTN \*Description: Test Class Group Document Short description is required.

Find | View All First 1 of 1 Last

*Term:	*Action	Class Nbr	Grading Basis	Units	Crse Count	Related 1	Related 2
5021	Swap Courses	1382	GRD	4.00	1.00	1402	
Action Dt	Reason	Change To	Grade In				
01/25/2012		1400		Biology	142	001	
				Organism & Populatr Biol W/Lab	Regular	Ugrad Coll	

Transcript Note ID:  Repeat Code:  Instructor ID:

Use the + when adding multiple classes.

#### Overrides

Access ID: Full Access

<input checked="" type="checkbox"/> Action Date	<input type="checkbox"/> Career	<input type="checkbox"/> Class Links	<input type="checkbox"/> Class Permission	<input type="checkbox"/> TimeConflict
<input type="checkbox"/> Appointment	<input checked="" type="checkbox"/> Closed Class	<input type="checkbox"/> Class Units	<input type="checkbox"/> Service Indicator	<input type="checkbox"/> Unit Load
<input type="checkbox"/> Dynamic Dates		<input type="checkbox"/> Grading Basis	<input type="checkbox"/> Requisites	<input type="checkbox"/> Wait List Okay

Choose any applicable overrides that will be needed to permit the enrollment.

#### Requirement Designation

Ovrd Requirement Designation

Requirement Designation:  Requirement Designation Option:

Requirement Designation Grade:

If you are enrolling after add/drop ends, you will be required to enter an action date of the last date of add/drop for the term of enrollment.

Go to: [Add Merge Process](#) [Class Block Defaults](#)

Save | Notify | Refresh | Add | Update/Display

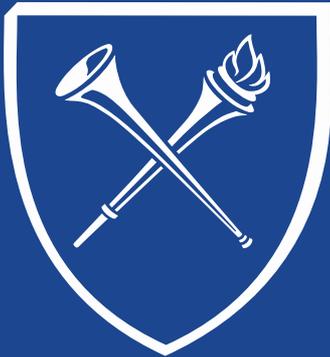
# EMORY



## OPUS Staff Training Manual

*Records Tab: Enrollment  
Manage Service Indicators*





## Maintain Service Indicators

Service Indicators are placed on a student's record to be



Positive notices (informational)

or



Negative notices (informational and/or preventive)



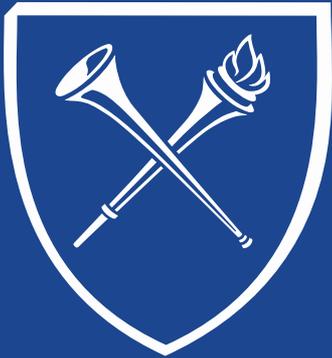
FERPA Invoked – Do not release **ANY** information regarding this student

Positive notices may alert users that important information regarding the student's record is available.

Negative notices may prevent enrollment the release of official documents until criteria has been met regarding the student.

Service indicators are placed on a student's record by authorized officials. Service indicators can only be released by authorizing official or their representative.

FERPA can only be released with written approval of the student.



## Service Indicators Search

---

Click the link on the Records Tab under the Enrollment folder

A search page will appear. Enter the student id or name and click SEARCH.

Click + *ADD A Service Indicator* to begin the process.

Please note: the student may have service indicators on their record. If they do click + to add a row on their record.



## Adding a Service Indicators

Student's name & ID

Service Indicator Code & Description

Start Term & Date (You may also enter End Term & Date)

Department that assigning the indicator

Who to contact?

Comments (if applicable)

Services Impacted (if applicable)

Click Apply & OK to SAVE.

Favorites | Main Menu | Campus Community | Service Indicators (Student) | Manage Service Indicators

### Add Service Indicator

James Wayne Dooley 0022365

\*Institution: EMORY Emory University

\*Service Indicator Code: REN Registrar: Prohibit Enrollment

\*Service Ind Reason Code: SCH Requested by School of Student

Description: School Dean has requested that the enrollment be stopped until University obligations are completed.

Effect: Negative

**Effective Period**

Start Term: 5156 Sum 2015 End Term:

Start Date: 04/20/2015 End Date:

**Assignment Details**

\*Department: 905020 University Registrar

Reference:

Amount: 0.00 Currency: USD

**Contact Information**

Contact ID: 0067949 Contact Person: Harris, Sylvia D

Placed Person ID: 0067949 Placed By: Harris, Sylvia D

**Comments**

This is a test

**Services Impacted**

Impact	Description	Basic Date	Basic Term	Term Category
1	Prohibit All Class Enrollment			

Service Indicator Date Time: 04/16/2015 3:34:48PM

User ID: SHARR13 Harris, Sylvia D

OK Cancel Apply



## Removing a Service Indicators

Return to the Manage Service Indicator page via the Records Tab link.

**Manage Service Indicators**  
Dooley, James Wayne 0022365

Display: Effect  Institution  [Refresh](#)

[+ Add Service Indicator](#)

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	Start Term Description	End Term	End Term Description	Start Date	End Date
REN	Registrar- Prohibit Enrollment	Requested by School of Student	EMORY	5156	Sum 2015			04/20/2015	

[+ Add Service Indicator](#)

Locate the correct service indicator and click on the code. A new screen appears with the information that was entered earlier. Notice there is a RELEASE button active in the upper right side of the page. Click the button and SAVE.

**Edit Service Indicator**  
James Wayne Dooley 0022365

\*Institution:  Emory University

\*Service Indicator Code:  Registrar- Prohibit Enrollment

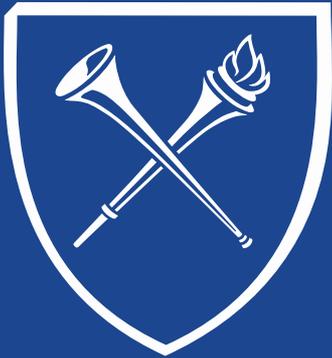
\*Service Ind Reason Code:  Requested by School of Student

Description:

Effect:

**Don't forget to SAVE at the bottom of the page.**

# EMORY



*If you have questions about any of the materials covered in this section, please contact the Training Coordinator in the Office of the Registrar at [registr@emory.edu](mailto:registr@emory.edu). Thank you.*

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