The following guide provides CAS Administrators with a quick overview of how to manually allocate students to classes. Manual allocations are sometimes performed prior to the main (automated) allocation run, but are most often performed when seeking to adjust class lists and/or assist students with clash scenarios.

The CAS support team can be contacted via email: help-cas@uwa.edu.au

If you would like to arrange a training session to further assist with manual allocations, please contact the CAS support team via email: help-cas@uwa.edu.au to arrange a time that suits. Training sessions can be provided one-on-one, or in small groups.
Manually Allocating Students to Classes

For the vast majority of units in CAS, the manual allocation of students to classes is not required. Indeed, the bulk of student allocations can and should be handled by the automatic allocation process performed each semester.

Where manual allocation of classes is required, allocations can be done in three ways:

1) Allocate Students in Context
2) List Allocation
3) Allocate through Sections

It is strongly advised that you seek further training with the CAS team if you intended to perform manual allocations.

Allocate Students in Context

The context allocate function allows a user to insert students into activities manually while watching the distribution of students across activities and certain student attributes. The fields included in the context table are configured globally by the system administrator and rely on custom fields being brought across from the student management system. Context allocation will also respect any allocation constraints (such as clash information, maximum or consecutive hour span limits) and prevent students being allocated in such scenarios.

To allocate students in context:
1. While logged in to CAS, search and select a subject.
2. Click the ‘Manage Subject’ button to open the Subject Administrator module.
3. Click on one of the Activity Groups listed along the left side of the screen. This will show you the Activities that are part of the Activity Group.
4. Click the ‘Allocate’ button. You will see a list of students in the ‘context allocation table’ and, below that, an ‘allocation distribution table’.
5. In the context allocation table, next to a student you want to allocate, use the ‘Select Activity’ dropdown box to select an activity code.
6. Click the ‘Allocate’ button next to the activity code you just selected. The student will be allocated to the activity you selected. If the student was already allocated to another activity, the allocation will be moved to the new activity.

7. Notice that the counts in the Allocation Distribution table are immediately updated, allowing you to monitor the distribution of students based on their attributes.

**To sort the list of students in the context allocation table:**

1. In the context allocation table, click on the name of the field you want to sort by, at the top of the field’s column (e.g. Student Code or last Name). The list of students will be sorted by that field, in ascending order.
2. Click on the name of the field again. The list will be sorted by that field, in descending order.

**To filter the list of students in the context allocation table:**

1. In the context allocation table, below the name of the field(s) you want to filter by, enter the first letters of the value you want to filter by.
2. The list will be filtered to include matching students only.
3. Clear the values from the text entry box and the filter will be removed.

**List Allocation**

The list allocate function allows a user to insert students into activities in a similar manner to allocation in context – however, this method will allow you to override some allocation constraints (such as clashes, planned size) and can also be used to further restrict students from being able to modify their manually allocated timeslots. This function also contains a “what if” option, which will allow you to preview the outcome of your manual allocations before committing the change to the CAS database.

**To list allocate students:**

1. While logged in to CAS, search and select a subject.
2. Click the ‘Manage Subject’ button to open the Subject Administrator module.
3. Click on one of the Activity Groups listed along the left side of the screen. This will show you the Activities that are part of the Activity Group.
4. Next to the relevant Activity, click ‘List’.
5. In the text entry box under 'Insert Listed Student(s)', type or paste the student code(s) of one or more students.

6. Click the 'Insert' button. A list of outcomes will be displayed, including information about any clashes, constraints, or other failures to allocate.

   **Note:** When using manual allocation functions, students who are already allocated to another activity will be moved to the new activity.

7. Click the back arrow (ToLeft) to return to the Activity List.

**To override allocation rules**

1. Follow the instructions above. Before clicking the 'Insert' button, tick the tickboxes next to 'Allow size overflow' or 'Allow clashes' to allow these rules to be broken.

**To test what will happen if you attempt to allocate a student (or list of students)**

1. Follow the instructions above. Instead of clicking the 'Insert' button, click the 'What If?' button. A list of outcomes will be displayed, including information about any clashes, constraints, or other failures to allocate.
2. At this stage, you can re-paste the list of students.
3. If desired, adjust the rule overrides by ticking/unticking the boxes next to 'Allow size overflow' or 'Allow clashes'.
4. Test again by clicking 'What If?' or, continue with the insert by clicking 'Insert'.

**To make an allocation that a student cannot change**

By using this function, a student will not be allowed to modify their allocation using the student module, even if the activity group is in “Allocate Adjustment” mode. This option is rarely used, so should be

1. Follow the instructions above. Before clicking the 'Insert' button, untick the tickbox next to 'Allow student changes'.
To deallocate a student (or students)
1. Tick the tickbox next to the student you wish to deallocate, or click ‘Select All’ if you want to select all the students in the activity.
2. Click the ‘Delete’ button. Note, this doesn’t delete the student from CAS, it simply deallocates them from the activity.

Allocate through Sections
Users with appropriate access can use the context allocation function (described above) for sectioned units, but section rules will not be applied. Therefore, the ‘section insert’ function is the preferred method for manually allocating students to sectioned subjects. This function will check that the relevant section constraints and combinations are applied for each student.

To allocate students to sections:
1. While logged in to CAS, search and select a subject that has sections.
2. Click the ‘Manage Subject’ button to open the Subject Administrator module.
3. Click ‘Section Insert’ on the Subject Administrator module menu bar.
4. Tick the box next to the activities you wish to allocate the student(s) to. Ensure that one activity is ticked for each activity group (i.e., there must be one tick in each column).
5. In the text entry box on the right, type or paste the student code(s) of one or more students.
6. Click the ‘Insert’ button. A list of outcomes will be displayed, including information about any clashes, constraints, or other failures to allocate.

To test what will happen if you attempt to allocate a student (or list of students)
1. Follow the instructions above. Instead of clicking the ‘Insert’ button, click the ‘What If?’ button. A list of outcomes will be displayed, including information about any clashes, constraints, or other failures to allocate.
2. Click the back arrow (⟲) to return to the Section Insert screen.

To override allocation rules
1. Follow the instructions above. Before clicking the ‘Insert’ or ‘What If?’ button, tick the tickboxes next to ‘Allow size overflow’ or ‘Allow clashes’ to allow these rules to be broken.

To explicitly override section rules:
1. Follow the instructions above. Before clicking the ‘Insert’ or ‘What If?’ button, tick the tickbox next to ‘Break section rules’.
**Review Allocations**

To view a list of students in an activity group that have been allocated:
This is a quick report to show which students are allocated to activities within that group. It is not designed to replace the official class list.

1. While logged in to CAS, search and select a subject.
2. Click the ‘Manage Subject’ button to open the Subject Administrator module.
3. Click on one of the Activity Groups listed along the left side of the screen. This will show you the Activities that are part of the Activity Group.
4. Click the ‘Allocated List’ button.

![Allocated Students](image)

To view a list of students in an activity group that have not yet been allocated (Unallocated List):
This is a quick report to show which students remain unallocated to an activity within that group. It is not designed to replace the official unallocated list.

1. While logged in to CAS, search and select a subject.
2. Click the ‘Manage Subject’ button to open the Subject Administrator module.
3. Click on one of the Activity Groups listed along the left side of the screen. This will show you the Activities that are part of the Activity Group.
4. Click the ‘Unallocated List’ button.

### Allocations with “Allow Clashes” option

Where manual allocations are undertaken via List Allocation or through Section Insert, allocations can be done using the “Allow Clashes” option. When utilised, this option will allocate students to both classes. The outcome is that the Enrolment view for a student will show both classes as displaying the green allocated icon.
Evidence that a manual allocation has placed a student into a clash scenario can be seen in the Timetable grid view, where all such classes will be will shaded in **RED**. **Students should therefore be instructed to consult this view following an “Allow Clash” allocation.**

**NB:** When performing manual allocations with the “Allow Clashes” option, staff should ensure that students are able to satisfy the attendance requirements of **both** classes.