



# Release Notes

## Updates to Assigning Sessions to Monthly Classes

### General Overview

Currently, if you convert a class that has previously billed monthly to use sessions, the system does not automatically associate existing enrollments with the Session, and no warning is displayed to make the customer aware of this. Because the occupancy service only counts enrollments that are associated with the selected Session when determining occupancy, this can lead to overbooking and issues with reporting if a particular Session is selected in the report filters.

The purpose of this task is to update the process the system uses when assigning a Session to a class that has previously billed monthly to address these issues.

### How will this benefit me?

Automating the process of updating enrollments to ensure that they are associated with the proper session will improve reporting and help to prevent scenarios where a class may be overbooked due to enrollments that were not properly updated.

### Where will I see these changes?

These changes will affect the Office Portal; in particular, the process of changing the "Bill Dates" settings from "This Class Bills Monthly" to "This Class Bills According to Custom Date Ranges."

## What is being changed/added?

System behavior is being updated so that whenever the "Bill Dates" setting for a class is changed from "This Class Bills Monthly" to "This Class Bills According to Custom Date Ranges," the following occurs:

1. The system will check to see if any enrollments are linked to the Class ID.
2. If not, the Session is assigned to the existing class as usual.
3. If enrollments *do* exist that are linked to the Class ID, the system will display the following warning message:

*You are attaching a Session to a class that is currently set to "This Class Bills Monthly." By continuing, the system will:*

- ❖ Create a duplicate class with the same name and details
- ❖ Attach the selected Session to the new class
- ❖ Transfer any current or future enrollments to the new class and associate them with the selected Session.

*Do you wish to continue?*

Yes    *No Thanks!*

- ❖ If you click *Yes*, the system will perform all of the tasks listed in the warning message.
  - ❖ If you click *No Thanks*, the system will cancel the process and:
    - A. Return to the "Bill Dates" tab with the original "This Class Bills Monthly" values intact (including any class dates/registration dates/priority registration dates) if the class is being edited directly.
    - B. Return to the main "Set Sessions" window if the "Mass Assign Sessions" QuickTool is being used.
4. When using the "Mass Assign Session" tool, if any classes are selected that have current or future enrollments that have start/end dates outside of the selected Session date range, the system will not update these classes and will produce an exception report that can be viewed/downloaded from the Background Tasks.

- A. This applies to:
  - I. Any enrollments where the Start date is *after* the end date of the session
  - II. Any current/future enrollments where the *end* date is before the end date of the session

## How does this work with existing settings?

This simply updates existing system behavior. No new settings are being added.