



# Scheduling Training: Part 1

February 11, 2026

# Training Overview

## Roll Calendars

- Once we have a preliminary overview of what your calendar will look like next year, this is the first step for the scheduling process.

## Roll Courses

- After cleaning up the Calendar portion, we will roll courses, reports, attendance and behavior codes.

## Roll Students

- When you are ready to begin scheduling a group of students, we then roll forward your students.

## Student Request

- This can be entered through student portal, walk-in scheduler, Request & Rosters or the course plan area of academic planner.

## Part 2 Prep

- Staff Planner
- Course Planner



# Rolling Calendar

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- Once the District requests to have their Calendars rolled, META will conduct this step utilizing the Calendar Wizard. We will then notify you to overview and edit the following...

• **NOTE: ENSURE YOU ARE MAKING  
EDITS/CHANGES TO THE 26-27  
CALENDARS ONLY!**

# Calendar Group Rights

4

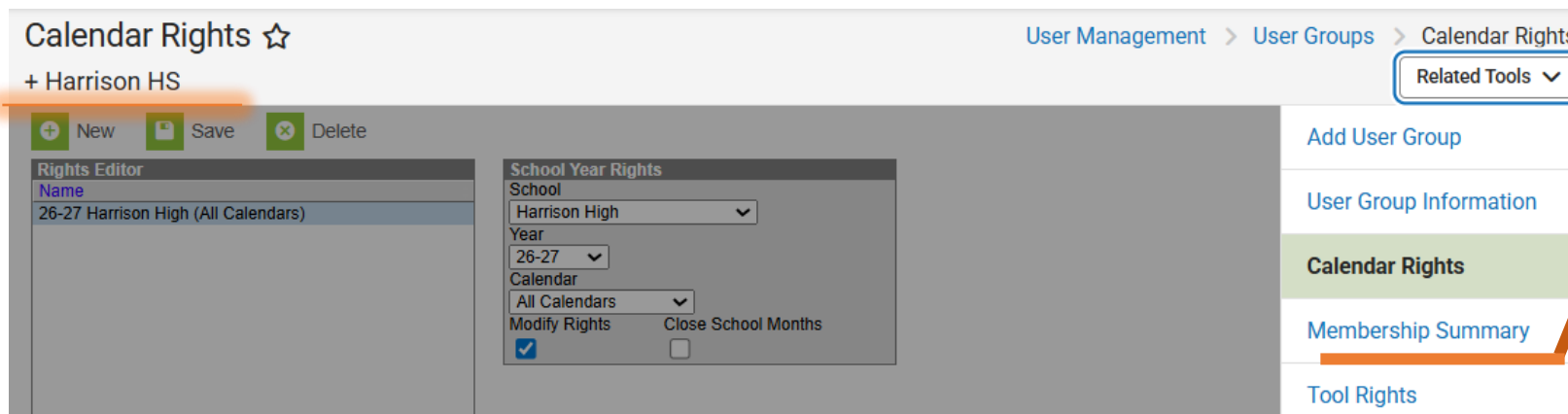
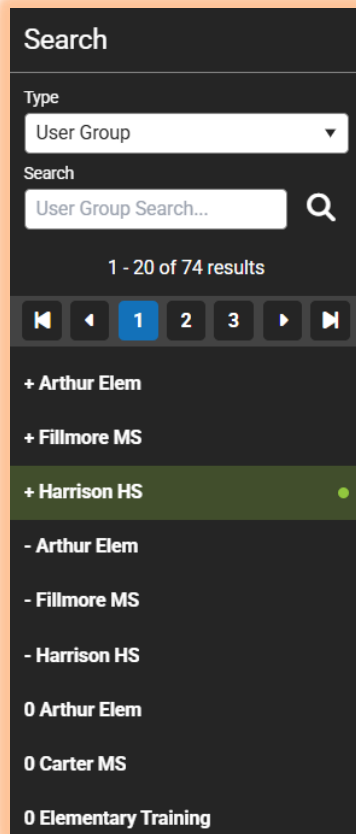
Ensure those working on the Calendar/Scheduling Setup process have access to your + Calendar group.

**Path: User Management > User Groups > Calendar Rights**

## *\*Recommendation\**

Utilize the following User Group Label for each school within your district:

- ❖ 0 *School Name* (to express the Current School Year)
- ❖ - *School Name* (to express Past School Years)
- ❖ + *School Name* (to express Future School Years)



### NOTE:

Review the Membership Summary to verify who has access and add/edit staff members appropriately.

# District Steps:

Path: Scheduling & Courses > Calendar Setup > Calendar Information

Calendar Information ★

Save

Mark for Deletion

Calendar Info

Calendar ID	Parent Calendar ID	School	
292	269	190 Harrison High (schoolID:15)	
<b>*Name</b>		Number	Sequence
26-27 Harrison High			
<b>*Start Date</b>		<b>*End Date</b>	Summer School
07/01/2026		06/30/2027	<input type="checkbox"/>
Student Day (instructional minutes)		Teacher Day (minutes)	Exclude
425		430	<input type="checkbox"/>
Whole Day Absence (minutes)		Half Day Absence (minutes)	School Choice
240		180	<input checked="" type="checkbox"/>
Type		External LMS Exclude	
I: Instructional		<input type="checkbox"/>	
Require Student Assignment			
<input type="checkbox"/>			
Ignore Master Push			
<input type="checkbox"/>			
Comments			
rolling 02/03/2026 07:50 AM			
Food Service Edit Check			
(default to blank - no override)			

Related Tools ▾

School Year Setup

Calendar Wizard

Calendar Information 5

Schedule Structure Setup

Grade Level Setup 1




Term Setup 2

Period Setup 3

Day Setup 4

# 1. Grade Levels

## Grade Level Setup

 New  Save  Delete

Grade Level Editor	
Name	Seq
09	10
10	11
11	12
12	13

09

\*Sequence Number  
10

\*State Grade Level Code  
09: Grade 9

Standard Day

Maximum Membership Days


Whole Day Absence (minutes)

Half Day Absence (minutes)

Maximum Approved School Choice Applications  
0

Kindergarten Schedule

Exclude from cumulative GPA/Rank calculations  
☐

Exclude from state reporting 

Exclude from Enrollment  
☐

Exempt from Assignment  
☐

Standard Code (SIF code)

Exclude from SIF reporting  
☐


Exclude from Grade/Age Validation  
☐

External LMS Exclude  
☐

Exclude from Online Registration Calculations  
☐

Spring Math Test Date

Attendance Pattern

Select Values 

On this tab, verify the grade levels are in their correct sequence, and the State Level Code corresponds accurately.

*\*Contact us if you are considering changing these items\**

If students are not in the grade level for this calendar, check the Exclude from state reporting box.

If there is an Attendance Pattern associated with this grade level, add the pattern name to this box.




**NOTE:** These are created in the Attribute/Dictionary:  
*System Settings > Custom Data and Links > Core Attribute/Dictionary > Definition > Attendance Pattern > Dictionary*

## 2. Terms:

If you are switching to Semesters, Trimesters, etc. it is important to delete the old term schedule and input the type you will use for the 26-27 school year, before the courses are requested to be rolled.

*NOTE: If you do not have your exact Term Dates, you can use generic dates in the meantime. Just REMEMBER TO UPDATE to this area once your district determines the correct term dates.*

### Term Setup

-  Save Term Schedule/Terms
  New Term Schedule/Terms
  Delete Term Schedule/Terms

**Term Schedule/Terms Editor**

Name

Quarters

**Term Schedule Detail**

\*Name Primary

Quarters ☒

Term Detail				
	*Name	*Sequence	*Start Date	*End Date
X	1	1	08/15/2025	10/26/2025
X	2	2	10/27/2025	12/20/2025
X	3	3	12/21/2025	03/02/2026
X	4	4	03/03/2026	05/30/2026
Add Term				

The Start and End dates cannot have a gap between them. They need to be consecutive, even if that makes the next term start date a weekend, holiday, etc.

# 3. Periods:

Verify, Update, or change your period schedule here. If there is a Period Schedule you are completely changing, it may be best to delete, HOWEVER please contact META if this is something you are considering.

Period Setup

Save Period Schedules

New Period Schedule

Delete Period Sched/Periods

Copy Period Sched/Periods

Period Schedule/Periods Editor

Name

Daily

Period Schedule Placement

	Daily
0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
ACT	ACT

Period Schedule Info

Name	Sequence	Exception/Special Day	Instructional Minutes	School Day
Daily	1	<input type="checkbox"/>	425	455

Period Info

Name	Sequence	Start Time	End Time	Lunch Time	Non-Instructional	Responsive
X 0	1	08:00 AM	08:35 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 1	2	08:35 AM	09:35 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 2	3	09:35 AM	10:05 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 3	4	10:05 AM	11:05 AM	0	<input type="checkbox"/>	<input type="checkbox"/>
X 4	5	11:05 AM	12:47 PM	30	<input type="checkbox"/>	<input type="checkbox"/>

- **Note:** Prior to rolling courses, it is best to EDIT your main period schedule. DO NOT DELETE and reenter, as that will remove section placement (*unless discussed with META*).
- Remove all Exceptional/extra period schedules to make the scheduling process easier to view/edit.

- If your district has multiple Period Schedules, it will be best to remove them at this stage and then re-add once the base period schedule is setup.
- Remember, if you have a special day (*2hr delay, late start, etc*), be sure to mark the “Exceptional/Special Day” checkbox.

## 4a. Days: Day Reset

For a typical Calendar these are the following steps to conduct a Day Reset.

*If your district does something unique, please consult with META for further assistance.*

1. Enter your Start Date:  
07/01/2026
2. Enter End Date: 06/30/2027
3. Uncheck 'Fill Missing Days Only'
4. Ensure Mon-Fri is checked
5. Click Create Days

### Day Setup

#### Auto Create Calendar Days

##### Day Reset

This tool will generate a Day record for each day in the Calendar. If your calendar dates are year-round, or larger than the days you need to track, enter a smaller date range to only create Day records for days that have instructional meaning for this Schedule Structure. If this function is performed on an existing calendar, all days and day events will be lost outside the range you choose (Unless you choose 'Fill Missing Days Only').

'Start Date

07/01/2026

'End Date

06/30/2027

Duration

0

Fill Missing Days Only



Mon



Tue



Wed



Thu



Fri



Sat



Sun



Create Days

# 4b. Days: Multi Day Event

10

Important step for accurate EMIS reporting!

## Day Setup

### Multi Day Event Wizard

This tool will create a multi-day event.

Warning: This will overwrite any Instruction, Attendance, or School Day choices previously selected.

\*First Day of Event

07/01/2026

\*Last Day of Event

08/14/2026

\*Type

NS: No School

Duration

Inst. Minutes

☐ Instruction

☐ Attendance

☐ School Day

Save Multi Day Event

The First Day of Event is 07/01/2026 and the Last day of Event will be the day **BEFORE** your first day of school. The Type is your districts No School code.

&

You will then run the Multi Day Event Wizard again, but this time: The First Day of Event is the day **AFTER** your last day of school, and the Last day of Event will be 06/30/2027.

The Type is your districts No School code.

## Day Setup

### Multi Day Event Wizard

This tool will create a multi-day event.

Warning: This will overwrite any Instruction, Attendance, or School Day choices previously selected.

\*First Day of Event

05/31/2027

\*Last Day of Event

06/30/2027

\*Type

NS: No School

Duration

Inst. Minutes

☐ Instruction

☐ Attendance

☐ School Day

Save Multi Day Event

## 4c. Days: Day Rotation

This step is only necessary for those districts that have a calendar with multiple period schedules for rotations (A/B days, etc.) and need to assign a period schedule to school days.

*NOTE: Period schedules marked as Exception/Special Day are not included when using the Day Rotation option. If a Day has an Exception/Special day period schedule attached to it or a Non-instruction day prior to running the Day Rotation, it will be skipped.*

### Auto Assign Period Schedule Rotations

#### Day Rotations

This tool will re-assign Period Schedules to Days to facilitate alternating and MTWRF Day Rotations within the specified date range. MTWRF Schedules need 5 Period Schedules defined (cannot be exception/special days). Alternating will work on any schedule.

\*Start Date

08/23/2023

\*End Date

05/24/2024

Rotation Type

☒ Alternating (Ignore vacation days)

☐ MTWRF - (Assign by days of week)

\*Starting Period Schedule (rotation continues following sequence numbers)

A ▼

\*Days repeated for Starting Period Schedule (first time ONLY, alternating days will have 1)

1

\*Days repeated for all following schedules (alternative days will have 1)

1

Assign Rotations

# 5. Calendar

Verify the data on the Calendar Tab is correct.

Period Schedule Info				
*Name	*Sequence	Exception/Special Day	Instructional Minutes	School Day
Daily	1	<input type="checkbox"/>	425	455

The Student Day (Instruction Minutes) should match what is showcased on the Period Schedules Instructional Minutes.

Calendar Info	
Calendar ID 292	Parent Calendar ID 269
School 190 Harrison High (schoolID:15)	
*Name 26-27 Harrison High	Number <input type="text"/>
*Start Date 07/01/2026	*End Date 06/30/2027
Student Day (instructional minutes) 425	Teacher Day (minutes) 430
Whole Day Absence (minutes) 240	Half Day Absence (minutes) 180
Type I: Instructional	Sequence <input type="text"/>
Require Student Assignment <input type="checkbox"/>	Summer School <input type="checkbox"/>
Ignore Master Push <input type="checkbox"/>	Exclude <input type="checkbox"/>
Comments rolling 02/03/2026 07:50 AM	School Choice <input checked="" type="checkbox"/>
Food Service Edit Check (default to blank - no override)	External LMS Exclude <input type="checkbox"/>



# Rolling Courses

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- After the previous steps have been completed, notify META and we will get your courses rolled for you.
- If you are making major course changes, let us know so we can first roll courses without the sections first.
- During this step we will also roll your Reports, Attendance/Behavior Codes.
- **REMEMBER: ENSURE YOU ARE MAKING EDITS/CHANGES TO THE 26-27 CALENDARS ONLY!**

# 6. Course Screen

Verify the data is up to date and accurate, paying close attention to the items important for scheduling.

**Note:** We have an inclusive training over the summer outlining important EMIS fields on the course screen. Please reference our Secure Documents area to review in depth insight on creating and updating the additional course fields.

## 1001 English 9

Course Sections Grading Tasks Standards Categories Curriculum Planner Grade Calc Options Course Rules Fees Build Constraints Assess

Save Delete Push To Sections

**Course Information**

CourseID 11060

\*Number  
1001

\*Name  
English 9

Standards-based ☐ Active Exclude from State Reporting ☒ External LMS Exclude ☐

Course-Only Curriculum ☐

Core Academic Class ☐

Subject Type  
Core Academic Subject Area (CORE) ☐ English (ENG) ☐

Department  
English

Max Students  
25

State Code  
050160: Integrated English Language Arts I

Schedule Load Priority

GPA Weight  
0

Type  
RG: Regular

Honors

Homeroom ☐ Allow student requests ☒ Allow teacher requests/recommendations ☒

CORE Area For Credit  
ENG: English

Comments

Terms 4 Schedules 1 Periods 1 Sections to Build 0 Preferred Room Type ☐

Section Template Group ☐

Bonus Points ☐ Advisory ☒ Transcript ☐ Required ☐

Responsive ☐ Activity ☐

Hide Standards On Portal ☐ Repeatable ☐ Attendance ☒ Positive Attendance ☐ High School Credit ☒

# 6. Course Screen Continued

Title	Description
Department:	Used to organize courses to help the scheduling process
Max Students:	The maximum number of students that can be scheduled into the sections of the course.
Terms:	Indicates the number of terms the course will cover
Schedules:	The total number of period schedules the course will meet (Typically 1)
Periods:	The number of periods the course will utilize
Allow Student Request:	Allows students to request the course through the Portal
Allow Teacher request/recommendations:	Indicates teachers can recommend students to take a course in the next years calendar (Through Course Request and Student Course Recommendations)

# 7. Course Rules:

## Scheduling Rules VS Planning Rules

### Scheduling Rules are

used to tell Scheduling Board the relationship between courses, teachers, etc.

**NOTE:** Less is more, as the more rules you place for a course, the harder it becomes for the Scheduling Board to handle the constrictions.

**1290 Algebra 1 A**

Course	Sections	Grading Tasks	Standards	Categories	Curriculum Planner
Grade Calc Options	<b>Course Rules</b>	Fees	Build Constraints	Assessments	Copy Cou

Rule Type	Rule Detail
Scheduling Rule	1290 Algebra 1 A Before 2290 Algebra 1 B
Scheduling Rule	1290 Algebra 1 A Same Section Number 2290 Algebra 1 B
Scheduling Rule	1290 Algebra 1 A Same Period 2290 Algebra 1 B
Planning Rule	Equivalent: This course has an equivalent course(s) that may restrict planning.
Planning Rule	Grade Level(s): Students may only plan to take this course in a specific grade level(s). Please see course description for more information.
Planning Rule	Parent Of: 1290 Algebra 1 A Parent Of 2290 Algebra 1 B

**Scheduling Rule Detail**

A Scheduling Rule only applies when a student has requested both Courses within the same calendar and the Schedule Wizard is trying to place the student into a section.

Course 1: 1290 Algebra 1 A      \*Rule: Before      \*Course 2: 2290 Algebra 1 B

Students take Course 1 before taking Course 2

Planning Rules are used for Academic Planner/Course Plan and define relationships to courses across the years.

If you are using Course Plan to create student request, and the Scheduling Wizard to schedule students, you will need both Planning and Scheduling rules attached to the course, because each only effect their respective areas and have no barring on one another.

# Scheduling Rules Examples:

Keep in mind Scheduling rules only takes effect when a student has requested both courses during the same scheduling year.  
Note: Scheduling rules may not operate as expected when a section spans multiple terms.

X = Math 100    X = Math 101

Infinite Campus

✓ Before & After

1	2	3	4
X	X	X	X
	X	X	X
		X	X

✓ Precedes & Follows

1	2	3	4
X	X		
	X	X	
		X	X

✓ Bind

X = Chemistry 12    X = Chemistry Lab 12

Must have both  
or neither

1	2	3	4
X			
X			

✓ Consecutive

X = Math 100    X = Math 101

1	2	3	4
X	X		
		X	X
X	X		

# Planning Rules Insight:

Remember! Planning rules are NOT used in the scheduling process

## Important Details

- ✓ If a year or semester course is broken down into multiple courses, the **Parent Of/Child Of** rules should be used.  
*\*Any other planning rules for this sort of setup is only necessary to be included/defined on the Parent course*
- ✓ Courses that require instructor approval need to ensure the 'Allow Student Request' checkbox on the course screen is UNCHECKED. Instructors will use the 'Student Course Recommendations' area in Instruction to recommend these courses.
- ✓ If a connecting course is inactivated, the Course Planning Rules need to be adjusted

<a href="#">+ New Scheduling Rule</a> <a href="#">+ New Planning Rule</a> <a href="#">Save</a> <a href="#">Delete</a>			
Rule List			
Rule Type	Rule Detail		
Scheduling Rule	1204 ENGLISH 2 (H)	Same Period	1203 ENGLISH 1 (H)
Scheduling Rule	1204 ENGLISH 2 (H)	Same Teacher	1203 ENGLISH 1 (H)
Planning Rule	Prerequisite: Student must have already taken English 1203 in order to take English 1204, and must have received a 3.0 GPA or better in 1203.		

### Planning Rule Detail

A Planning Rule defines relationships between courses across years, allowing students to effectively plan their school career and take courses that fit their needs. Planning rules are not used in the scheduling process.

**\*Rule**

Prerequisite

Prerequisite means that the student must have completed or planned to complete a course in an earlier year before planning the next course in the sequence. The course numbers entered in the Transcript/Course Number(s) field must be completed in the previous year before the student can take the selected course.

**\*Display Value**

Student must have already taken English 1203 in order to take English 1204, and must have received a 3.0 GPA or better in 1203.

**\*Transcript/Course Number(s)**

1203

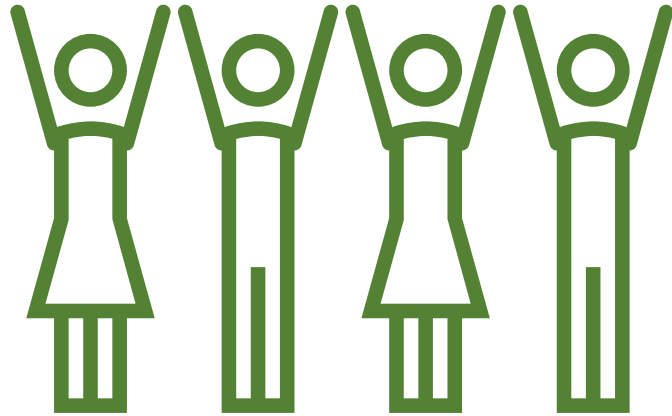
Preview

**Credits**

1

**Min GPA Value**

3



# Roll Students

- Once your Courses are cleaned up and prepared, META will Roll your Students into the new Calendar
- *NOTE: From this moment forward, students that are rolled forward will have to be edited in both calendars if an enrollment or withdrawal need to take place.*

# Student Constraints:

An optional step if you would like IC scheduling tools to enforce when students should not be placed in a class together.

**Path:** *Scheduling & Courses > Build Schedules > Student Constraints Setup*

*\*Can also be rolled each year\**

## Student Constraints Setup ☆



New

The Student Constraints tool creates constraints between one student and another student to reduce their interaction in courses. These constraints are taken into account by the Scheduling Board to place students into requested courses. The list of constraints may be quite long; to filter results for a specific student, type the start of a name in either the Student 1 or Student 2 columns, or both.

Student Constraints		
Student 1 ▼	Constraint Type ▼	Student 2
<input type="text"/>	<input type="text"/>	<input type="text"/>
Fuller, Dia (G:09#:1195 F)	should not be placed with	Gadow, Tameka (G:09 #:1211 F)
Fuller, Dia (G:09#:1195 F)	should not be placed with	Garratt, Gidget (G:09 #:1231 F)
Gadow, Tameka (G:09#:1211 F)	should not be placed with	Garratt, Gidget (G:09 #:1231 F)
Haffner, Sorchia (G:10#:115419 F)	will not be placed with	Haggar, Nicholas (G:10 #:115419 F)



# Scheduling Request

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- There are several options for how students may receive Scheduling Request based on your district settings.

# Preferences:

Districts will need to enable their future calendar portal preferences if they are allowing students to update their Course Plan and/or input requests via Campus Student.

*Path: System Settings > Portal Preferences > Portal Display Options*

Options	Description
<b>Enable Academic Plan Tool</b>	Displays information related to a student's course plan
<b>Enforce All Rules</b>	When not marked, students can save their plan without meeting all requirements, but all planning rules must still be met. When marked ALL planning rules and requirements must be fulfilled before saving.
<b>Approval by parent</b>	When marked, parent/guardians have the option to mark a box indicating they have reviewed the plan.
<b>Display Course Fees</b>	Any fees assigned to a course will display when viewing that course in the course catalog search results
<b>Allow to change course plan</b>	When marked for campus student or parent, they can add or remove courses from the course planner. When not marked only district staff can change plans for students.
<b>Enable Course Registration Tool</b>	List the requested courses for the next school year for the student. (This is the only Course registration portal preference to check.)

It is not recommended that both Academic Planner and Course Registration options be turned on at the same time. It is best to have a window of time when students can add courses to their course plan (*Academic Planner rights*), and a time when students can enter course request (*Course Registration*). This will eliminate the risk of overwriting course request or planned courses.

# 1. Request & Rosters:

Allows users to create, modify or remove Required course request for groups of students (*Grade level, prior enrollment, ad hoc, etc.*)

Path: Scheduling & Courses > Scheduling > Request & Rosters

Requests & Rosters ☆

Scheduling & Courses > Scheduling > Requests

View by: **Students** Courses Show Details OFF Filter Clear Filters

Filter Results: 850 out of 850 Students

Bauer, Michael (10) #031110005	Unsatisfied Requests: 1	Rosters: 0
Baum, Allison (10) #161900004	Unsatisfied Requests: 2	
Berger, Zoey Petal (09) #0454	Unsatisfied Requests: 0	

**Student Filter**

Filter by Ad Hoc: No Filter

Unsatisfied Requests: Select items...

Request Type:

☐ Special Education Only

☒ Include Inactive Students

Calendar: The following filter options will be determined by the selected calendar.

26-27 Harrison High

If mass entering request, at this time, it is imperative to have "Include Inactive Students" checked, and the calendar you would like to filter students based on.

# 1a. Request & Rosters:

## Batch Edit Student Request

View by **Students** **1** Show Details OFF **Filter** **2** **Reset**

**4** Filter Results: 172 out of 850 Students

Berger, Zoey Petal (09) #045460128	
Unsatisfied Requests: 0	Rosters: 8
Blaha, Danah (09) #035460049	
Unsatisfied Requests: 0	Rosters: 8
Campus, Ethan (09) #171750003	

« 1 2 »

Student Filter **3**

☒ Include Inactive Students

**Calendar**  
The following filter options will be determined by the selected calendar.

26-27 Harrison High

**Schedule Structure**  
Main

**Course Roster**  
Select items...

**Section Roster**  
Select items...

☐ Include Dropped Students

**Grade Level(s)**  
09 ✕

- 1) Ensure you are on the View By **Student** Category.
- 2) Click **Filter** to view the flyout menu
- 3) Make selections for the students you would like to batch add a request.
- 4) Click Close and verify the number of students in the Filter results area. This will be the student who will be affected by the batch.

# 1b. Request & Rosters:

Once your filter is finalized, Click on “Batch Edit Student Requests”

## Requests & Rosters

View by **Students** Courses ☐ 0

Filter Results: 172 out of 850 St

Berger, Zoey Petal (09)

Unsatisfied Requests: 0

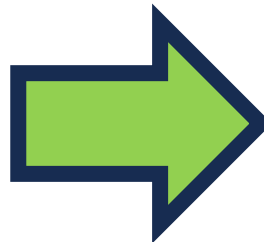
Blaha, Danah (09) #03

Unsatisfied Requests: 0

Campus, Ethan (09) #1

◀ ◻ 1 ◻ ▶ ▶▶

Batch Edit Student Requests



## Batch Edit Student Request Information

172 student records will be affected

Filter the result set using the fields below.

Add or remove a request by selecting the course name from the filtered list.

COURSE	DEPARTMENT	REQ TYPE
3100 English 9	Select items...	Unselect All
✓ 3100 English 9	English	R

Add

Remove

Cancel

Select the Course you would like to Mass add the filtered students to, choose the Request type and click Add.

# 2a. Course Plan:

Counselors can work with students to map out their anticipated classes for the upcoming school year. This area considers Planning Rules and the Allow Student Request checkbox on the course screen.

*Path: Student Information > Academic Planning > Course Plan*

## Important Information:

If your district plans to use the Course Plan for requests, the student can NOT have any scheduled courses in the respective year.

Adkins, Tristen J Permanent Requirements

Grade: 10 #223601 DOB: 08/22/2006 Gender: M Counselor: Guyana, School

Programs Progress **Course Plan**

Save Course Plan Report

Program: Permanent Requirements (Graduation) Counselor: Guyana, School

Academic Program: Ohio Citizenship Seal (Seal)

Approved by parent/legal guardian

**ALERT:** Ohio Citizenship Seal Compound Requirement not met: Students will earn the Citizenship Seal by demonstrating knowledge and skills through course work, on Ohio's State Tests, Advanced Placement and International Baccalaureate courses and tests, or in CCP coursework.

Grade: 09 0.00 / 4.50 Grade: 10 5.00 / 7.50 Grade: 11 0.00 / 5.00 Grade: 12 0.00 / 4.00

**English (1.00 / 4.00)**

0.00 / 1.00 1.00 / 1.00 0.00 / 1.00 0.00 / 1.00

1101 English 10 - 1.00

**ALERT:** Not enough credits selected in English to meet the minimum plan requirements.

**Fine Arts (0.00 / 1.00)**

0.00 / 0.50 0.00 / 0.50

12345 Training Course - 1.00

**ALERT:** Not enough credits selected in Fine Arts to meet the minimum plan requirements.

**Health (0.00 / 0.50)**

0.00 / 0.00 0.00 / 0.50 0.00 / 0.00 0.00 / 0.00

**ALERT:** Not enough credits selected in Health to meet the minimum plan requirements.

**Mathematics (0.00 / 4.00)**

0.00 / 1.00 0.00 / 1.00 0.00 / 1.00 0.00 / 1.00

**ALERT:** Not enough credits selected in Mathematics to meet the minimum plan requirements.

**Physical Education (0.00 / 0.50)**

0.00 / 0.00 0.00 / 0.50 0.00 / 0.00 0.00 / 0.00

**ALERT:** Not enough credits selected in Physical Education to meet the minimum plan requirements.

**Science (0.50 / 3.00)**

0.00 / 1.00 0.50 / 1.00 0.00 / 1.00 0.00 / 0.00

2221 Biology I - 0.50

**ALERT:** Not enough credits selected in Science to meet the minimum plan requirements.

**Social Studies (1.00 / 3.00)**

0.00 / 0.00 1.00 / 1.00 0.00 / 1.00 0.00 / 1.00

2021 American Studies 10 - 1.00

## 2b. Student Course Recommendations:

This tool allows teachers, who have the tool right to this instruction area, to recommend future courses for students within the same Credit Type or Department as the current course if the student has a future enrollment. The recommendations will display on the students Course Plan.

*Path: Campus Instruction > Student Course Recommendations*

Term **1 (07/01/14 - 09/26/14)** Section **01) 580000-1000 AP Calculus**

Name ▲	Future Enrollment	Recommended Courses
11 Student, Andrew T	14-15 T F Riggs High School	<input type="button" value="× 580512 AP Calculus (B)"/> <input type="button" value="× 999990 College Algebra Math 102 (CUC)"/>
10 Student, Bree W	14-15 T F Riggs High School	<input type="text" value="Type to search or select courses"/>
09 Student, Brooke J	14-15 T F Riggs High School	<input type="button" value="× 580512 AP Calculus (B)"/>
12 Student, Devin L		Student does not have a future enrollment.
12 Student, Jordan E		Student does not have a future enrollment.
12 Student, Kyle M		Student does not have a future enrollment.
09 Student, Luke C	14-15 T F Riggs High School	<input type="button" value="× 580512 AP Calculus (B)"/>

# 2c. Academic Plan-Campus Student:

28

Students can add courses to their Course Plan through Campus Student. Ensure the Portal Preferences are updated for Students to utilize this area if applicable.

Today

Calendar

Grades

Attendance

Schedule

Academic Plan

Documents

Message Center

More

Academic Plan

Save

Course Plan Report

Search the Course Catalog

Program: Grad Plan (Graduation)

Counselor: Counselor, Manjou

Approved by parent/legal guardian

ALERT: Insufficient Academic Program participation: Tech CTE Req

Grade: 09 12.0 / 12.0

Grade: 10 13.0 / 12.0

Grade: 11 10.5 / 12.0

Grade: 12 9.0 / 10.0

English (7.0 / 8.0)

2.0 / 2.0

2.0 / 2.0

2.0 / 2.0

1.0 / 2.0

1700 English 9 I - 1.0

1701 English 9 II - 1.0

1702 English 10 I - 1.0

1703 English 10 II - 1.0

1740 English 11 I - 1.0

1741 English 11 II - 1.0

1743 English 12 II - 1.0

ALERT: Not enough credits selected in English to meet the minimum plan requirements.

Mathematics (6.0 / 6.0)

2.0 / 2.0

2.0 / 2.0

1.0 / 2.0

2.0 / 0.0

4012 Geometry I - 1.0

4013 Geometry II - 1.0

4010 Algebra I I - 1.0

4011 Algebra II 2 - 1.0

1400 OIL Probability & Statistics - 1.0

1400 Functions, Stats & Trig - 1.0

4606 Statistics II - 1.0

1.0 credit overflow to Elective

## 2d. Course Plan to Request:

29

The 'Create Course Requests' mode takes the courses selected in the students' course plan for the next grade level and turns them into scheduling requests.

*Path: Student Information > Program Admin > Course Plan Admin*

**Course Plan Administration**

This tool is used to perform batch operations on multi-year student course plans and can mass add/remove/replace courses, calculate Graduation and Academic program on-track status, lock/unlock course plans, post diplomas to the graduation record and post the planned courses to Course Requests for scheduling.

Select Mode

Create course requests ▼

The courses selected in the students' course plan will be created as scheduling course requests to the currently selected calendar for the grade the student will be enrolled in. A student with a course plan will replace all previously created course requests. Students without a course plan will leave their existing course requests unchanged. Changes to course plans will not automatically update course requests.

Ensure that you are creating requests in the future calendar that you are planning to schedule.

RUN

### Important Note:

- ❖ Planned courses turned to requests are considered priority
- ❖ Courses from a course plan replace all previously created course requests for that student
- ❖ Changes to a course plan, will not automatically update to course requests.

### 3. Student Portal:

Allows students with future enrollments (*and their parents*) to select which courses they would like to take.  
Path: Campus Student > More > Course Registration > Select future enrollment

< Back

33% complete Units: 24/72

Add Course

pai

ACTION	COURSE NAME	UNITS
+	Computer Maint & Repair I 9645	2
+	Draw & Painting II-III (Block) 7710	4
+	Draw & Painting Seminar 7846	2

Add Course

Would you like to add this course as a Request or an Alternate?

Draw & Painting Seminar  
7846

Request Alternate Cancel

#### Important Information:

- ❖ Courses the Counselor added will display as **Required** and cannot be changed by the student
- ❖ Students can change a course from a **Request** to an **Alternate** by clicking on the course and selecting the Convert to Alternate button.

\*Required and requested courses are given a higher priority for placement on your schedule.\*

# 4. Teacher Course Request:

This tool allows a teacher to recommend a course for any student in their course section, and the request will appear in the students Walk-In Scheduler.

*Path: Campus Instruction > Course Request*

Term  Section

Name ▲	Future Course Request
10 Student, Andrew	<input type="text" value="2350 US History B"/>
10 Student, Bree	<input type="text" value="2350 US History B"/>
10 Student, Brooke J	<div> <div>----Select Course----</div> <div>2300 US History A</div> <div>2350 US History B</div> </div>
Student, Kyle M	<input type="text" value="----Select Course----"/>
Student, Luke C	Student is not yet future enrolled.
Student, Lydia J	<input type="text" value="----Select Course----"/>

## Important Information:

Before/After Course Rules must be established in the current year's calendar to use Course Request.

# 5. Walk-In Scheduler:

The **Request** Panel stores the courses that are requested for the student. Click the Add Request panel to enter course information to add courses to the students' request list.

*Path: Student Information > General > Schedule > Walk-In Scheduler*

**Beemish , Bryce B**  
 Grade: 09 #224099 DOB: 09/20/2009 Gender: M Counselor: Guyana, School

Contact Log Graduation Standards Athletics Ad Hoc Letters Waiver Records Transfer Truancy Report Comments Forms Blended Learning Group Assignments RIMP

Summary Profile Enrollments **Schedule** Attendance Flags Grades Transcript Credit Summary Assessment Behavior Transportation Fees Lockers

Filter Settings

	1ST (8/23/2023 - 10/31/2023)	2ND (11/1/2023 - 1/30/2024)	3RD (1/31/2024 - 3/28/2024)	4TH (3/29/2024 - 5/24/2024)	
1 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	Requests Search
2 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
3 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
4 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
5 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
6 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
7 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
8 Period	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	
Winter Ath	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course	

**Requests** Scheduling Units:  $\frac{6}{32}$

Effective Date  Team

COURSE NAME	UNITS	TYPE	#
UNUNSCHEDULED			
English 9 1001	4	R	1
Lunch (9-12) 6500	2	R	2

**Add Requests**

Request Search

COURSE NAME	UNITS	ADD
World Studies 9 2001	4	+
American Studies 10 2021	4	+
World Geography & Cultures A 2041	4	+
American Govt/Current Issues A 2061	4	+
Physical/Earth Science 2201	2	+
Biology I 2221	4	+

## Each request is assigned a request type:

- R- Required (Those entered by school personnel)
- E- Elected (Entered by student or staff member)
- A- Alternate (Entered by student or staff member and will display in the order they were entered. These type of request will not be automatically loaded and will need to be manually placed when another course request could not be met)

**Schedule Units Report**

This report aggregates student requests and compares them against the student units. A satisfied unit occurs when the course has been requested by the student. Course size is calculated by counting the number of periods that can be filled over the primary term. Periods marked noninstructional are not counted.

Population: Under-Requested ▾

Ad Hoc Filter:

Sort Options: ☒ Alpha ☐ Grade/Alpha

Report Format: PDF ▾

☒ Active Students Only

Enrollment Effective Date: 01/18/2022

# Scheduling > Reports:

- **Schedule Units\***: Shows a count of units the student has requested.
- **Request Detail**: Returns a list of student request by course.
- **Request Batch**: Provides a one page per student list of their request.

**Request Detail Report**

This report lists the students that have requested courses from the chosen department prepared for duplex printing and will insert a blank page between departments if the odd numbered page. When the duplex printing checkbox is unchecked, the report will not insert a blank page. Since detail data is reported, this report could take a while to generate if you select to print all requests.

Request Type: All ▾  
Required  
Elective  
Alternate ▾  
CTRL-click or SHIFT-click to select multiple

☒ Display Only Active Courses

Department: ▾

OR

Course: 1007 3-D Design  
1009 Painting  
1022 Mixed Media Arts  
1025 Ceramics  
1033 Concert Choir  
1043 Advanced Concert Band  
1045 Symphonic Band  
1047 Drama I  
1050 Adv Drama  
1055 Guitar I  
1060 Guitar II  
1075 Music Appreciation  
2009 Chemistry and Agriscience  
CTRL-click or SHIFT-click to select multiple

Ad Hoc Filter:

Sort Options: ☒ Alpha ☐ Grade/Alpha

☒ Prepare report for duplex printing

Report Format: PDF ▾

**Request Batch Report ☆**

This report will batch print student course requests, 1 page per student suitable for handing out to students. This can be a very large report, so try to limit the number of students included per batch by using an AdHoc filter or selecting a single grade level. Student requests can be displayed as Required, Elective, and Alternate or Requested and Alternate (based on the Request Type). Report Comments, up to 250 characters, will print on all pages.

Ad Hoc Filter:

OR

Grade: All Students ▾

Student Sort Options: ☒ Alpha ☐ Grade/Alpha ☐ Teacher

Course Display Options: ☒ Group requests as Required, Elective, or Alternate  
☐ Group requests as Requested or Alternate

Report Comments (prints on all pages):

Report Format: PDF ▾



# Tools in Infinite Campus

- The following are helpful set up tools within IC to help prepare your district to utilize the Scheduling Board.

- **NOTE: ENSURE YOU ARE MAKING EDITS/CHANGES TO THE 26-27 CALENDARS ONLY!**

# Staff Planner

Classic Path: *Scheduling & Courses > Scheduling > Staff Planner*

The Staff Planner allows schools the ability to establish various boundaries as it relates to a teacher and a course. The main view of Staff Planner list the max number of periods and courses a staff person can teach.

Staff Planner ★ Scheduling & Courses > Scheduling > Staff Planner

Filter ^

Show Details

ON

Filter by Name

Filter by Department

Filter by Ad Hoc

Select items...

Select items...

No Filter

Algebra, Professor \* | (07/01/2011)

PLACEMENT RESTRICTIONS

Max Periods: (8)

Max Courses: (8)

Max Con Periods: (8)

Team: None

FTE %: 100

Courses: 1

Min Sections: 3

Max Sections: 3

Rooms: 1

10 ALG 1880 Algebra II

545 (1)

Baker, Teacher \* | (07/01/2011)

PLACEMENT RESTRICTIONS

Max Periods: (8)

Max Courses: (8)

Max Con Periods: (8)

Team: None

FTE %: 100

Courses: 0

Min Sections: 0

Max Sections: 0

Rooms: 1

545 (1)

Field	Description
Max Periods	Maximum number of periods the teacher can teach during the day (default values are determined based on Build Settings)
Max Courses	Maximum number of courses the teacher can teach during the day (default values are determined based on Build Settings)
Max Cons. Periods	Maximum number of consecutive periods the teacher can teach during the day without a prep period/break (default values are determined based on Build Settings)
FTE%	Value is automatically calculated from Max Period field divided by the Max Course Field
Courses	Number of courses teacher can be added to teach. Show detail toggled on will display the specific courses
Min Sections	Least number of sections that can be assigned to a teacher
Max Sections	Maximum number of sections that can be assigned to the teacher
Rooms	The room numbers that the teacher can teach in.

# Staff Planner: Individual Edits

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Edit individual teacher items by clicking their name to display this flyout menu.

Brave, Teacher \*

Max Periods (8) Max Courses (8) Max Consecutive Periods (8) Team

Collapse All

## Courses & Rooms

Add or remove a course or room by selecting their course name/room number.

Filter by Course Number, Name or Department

musi

COURSE	DEPARTMENT	MIN	MAX *
✓ 06 ART Art	General Education	0	5
06 MUS Music	Music	(0)	(0)
08 MUSIC Music	Music	(0)	(0)
HS EXC 3051 Chorus	Music	(0)	(0)

Filter by Room or Room Type

ROOM	PRIORITY *
✓ 102	1
✓ 120	2
100	
100A	
101	
103	
104	
105	

Users can modify the min/max values as needed for the selected courses that the staff can teach.

## Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

Filter by Term

Filter by Period Schedule

	1ST Day-1	2ND Day-1	3RD Day-1	4TH Day-1
1 Period				
2 Period	⊘	⊘	⊘	⊘

The Placement Restriction section creates a constraint on the selected period or term that a teacher should not be teaching. When a restriction is added, the No symbol is added to the period (to remove, click the item again).

Save & Next Cancel

< Prev - Baker, Teacher \*

Bullock, Teacher \* - Next >

# Staff Planner: Batch Edit Staff

The **Batch Edit Staff** option adds or replaces the values for the staff information that displays on the main view of the Staff Planner

*\*It is recommended that Filter options be added prior to utilizing the Batch options\**

Filter

Show Details

Filter by Name

Filter by Department

Filter by Ad Hoc

Select items...

Social Studies Science

No Filter

Staff, Aaron   Social Studies (09/07/2010)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 3
2700 Human Geography I					
2702 U.S. History I					
2706 U.S. Government					
Staff, Bailey   English (08/27/2007)   Science (08/27/2013)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 0
Staff, Cameron   Science (09/07/2010)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 0
Staff, Darlene   Social Studies (08/30/1994)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 0
Staff, Elliot   Social Studies (08/03/2017)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 0
Staff, Francine   Science (09/07/2010)					
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100	Courses: 0

Batch Edit Staff

Batch Edit Constraints

Print

Batch Edit Staff Information

26 filtered records will be affected. Including a field with no Fill Value will delete existing data when using Replace.

Max Periods

Include ☒ Fill Value

Max Courses

Include ☒ Fill Value

Max Consecutive Periods

Include ☒ Fill Value

Team

Include ☐ Fill Value

Add

Replace

Cancel

Add will add the entered values to the filtered staff list who do not already have values entered

Replace UPDATES the entered values for the filtered list.  
*Note: When there is existing data for staff, using replace with overwrite the previous data.*

# Staff Planner: Batch Edit Constraints

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The **Batch Edit Constraints** modifies the Course Constraints, Room Constraints, and Placement Restrictions for the Filtered staff by adding where values do not exist, replacing existing values with new values, or removing values.

*\*It is recommended that Filter options be added prior to utilizing the Batch options\**

Filter ^

Show Details

ON

Filter by Name

College, Math M ✕ Math, Megan \* ✕ Teach, Math B ✕

College, Math M | (07/01/2015)

Max Periods: (8) Max Courses: (8)

Math, Megan \* | (07/01/2012)

Max Periods: (8) Max Courses: (8)

Teach, Math B | (07/01/2015)

Max Periods: (8) Max Courses: (8)

Batch Edit Staff Constraints

3 filtered records will be affected. Including a Constraint section with no selections will delete existing data when using Replace.

Collapse All

Course Constraints

Include

Add or remove a course by selecting its name.

Filter by Course Number, Name or Department

COURSE	DEPARTMENT	MIN	MAX *
✓ 06 MATH 6 Math	Math	0	3
✓ 07 MATH 7 Math	Math	0	3
✓ 08 PREA 8 PreAlgebra	Math	0	3
06 ART Art	General Education	(0)	(0)
06 ELA 6 English/Language Arts	English	(0)	(0)
06 MUS Music	Music	(0)	(0)
06 PE Physical Education	Physical Education	(0)	(0)
06 SCI 6 Science	Science	(0)	(0)

+ Room Constraints

- Placement Restrictions

Include

Click on a box to update course placement restrictions. Select an entire row or column by clicking the header.

Filter by Term

Filter by Period Schedule

	1ST Day-1	2ND Day-1	3RD Day-1	4TH Day-1
1 Period	⊘	⊘	⊘	⊘

1 Period

Batch Edit Staff

Batch Edit Constraints

Print

Add

Replace

Remove

Cancel

# Course Planner

Classic Path: Scheduling > Scheduling Center > Course Planner

Displays request tallies, computes sections needed and compares students' requests and sections to last year's calendar. Course Constraints, Room Placement and teacher assignments can also be modified in this area.

- **Request:** list the current number of request that have been made.
- **Red** arrow indicates it is less request/sections than last year.
- **Green** arrow indicates there are more request/sections needed than last year.
- **Yellow** caution triangle indicates the values do not total correctly.

Course Planner

Scheduling & Courses > Scheduling > Course Planner

Filter

Filter by Course Number or Name  
Select Items...

Filter by Department  
Select Items...

Filter by Ad Hoc  
No Filter

06 ART Art | General Education

Requests

Current  
26

Sections

Needed  
3

To Build  
5

Placed  
1

Remaining Seats  
24

06 ELA 6 English/Language Arts | English

Requests

Current  
26

Sections

Needed  
0

To Build  
5

Placed  
1

Remaining Seats  
224

06 MATH 6 Math | Math

Requests

Current  
26

Sections

Needed  
0

To Build  
5

Placed  
1

Remaining Seats  
224

06 MUS Music | Music

Requests

Current  
26

Sections

Needed  
0

To Build  
5

Placed  
1

Remaining Seats  
224

06 PE Physical Education | Physical Education

Requests

Current  
26

Sections

Needed  
0

To Build  
5

Placed  
1

Remaining Seats  
224

Course

Terms  
1

Schedules  
1

Period  
1

Priority Max Students  
8 10

Constraints

Teachers  
1

Rooms  
0

Rules  
0

Course

Terms  
4

Schedules  
1

Period  
2

Priority Max Students  
1 50

Constraints

Teachers  
0

Rooms  
0

Rules  
0

Course

Terms  
4

Schedules  
1

Period  
2

Priority Max Students  
1 50

Constraints

Teachers  
2

Rooms  
0

Rules  
0

Course

Terms  
1

Schedules  
1

Period  
1

Priority Max Students  
8 50

Constraints

Teachers  
0

Rooms  
0

Rules  
0

Course

Terms  
1

Schedules  
1

Period  
1

Priority Max Students  
8 50

Constraints

Teachers  
4

Rooms  
0

Rules  
0

Batch Edit Course

Batch Edit Constraints

Print

Feedback

- **Sections** area showcases recommendations based on student request, Max Students, etc.

- How many **Terms** the course takes place.
- How many **schedules** should the course appear
- How many **period(s)** the course covers.

- **Max Student:** Seat count for the section(s) of the course.
- **Priority:** tells the Wizard importance of loading students into the course.

# Course Planner: Individual Edits

40

Filter

Filter by Course Number  
Select items...

06 ART Art

Requests  
Current 26 ↓  
Last Year 34

06 ELA 6

Requests  
Current 26 ↓

06 MATH

Requests  
Current 26 ↓

06 MUS M

Requests  
Current 26 ↓

06 PE Phy

Requests  
Current 26 ↓

06 SCI 6 S

Requests  
Current 26 ↓

06 SOC 6

Requests  
Current 26 ↓

06 ART Art | General Education

Requests  
Current 26 ↓  
Last Year 34

Collapse All

Teachers & Rooms

Add or remove a teacher or room by selecting their name/room number.

Filter by Teacher Name, Department or Team

5  
3

TEACHER	DEPARTMENT	TEAM	MIN	MAX *
✓ Miller, Art *				5
Sally, Mae	Math		(0)	(0)
Algebra, Professor *			(0)	(0)
Baker, Teacher *			(0)	(0)
Brave, Teacher *			(0)	(0)
Bullock, Teacher *			(0)	(0)
CCP, Teacher			(0)	(0)
Chap, Teacher *			(0)	(0)

Sections  
To Build  
3  
Needed 3 ↑  
Placed 1  
Last Year 1

Students  
Max  
10  
Remaining 24  
Average Size 8

Terms  
1

Schedules  
1

Periods  
1

Section Template Group

Room Types

Priority  
8  
Exclude from Build  
☐

Filter by Room or Room Type

ar

ROOM	PRIORITY *
✓ ART	1

+ Rules

+ Placement Restrictions

Filter the list prior to using batch edit options

# Course Planner: Batch Functionality

## Batch Edit Course Information

48 filtered records will be affected. Including a field with no Fill Value will delete existing data when using Replace.

### Sections to Build

Include Fill Value

☐ 

### Max Students

Include Fill Value

☐ 

### Terms

Include Fill Value

☐ 

### Schedules

Include Fill Value

☐ 

### Periods

Include Fill Value

☐ 

### Section Template Group

Include Fill Value

☐ 

### Room Type

Include Fill Value

☐ 

### Priority

Include Fill Value

☐ 

### Exclude from Build

Include Fill Value

☐ ☐

Add

Replace

Cancel

The **Batch Edit Constraints** modifies the Teachers, Room and Placements Restrictions for the filtered courses.

## Batch Edit Course Constraints

48 filtered records will be affected. Including a Constraint sectic

Collapse All

+ Teacher Constraints

+ Room Constraints

- Placement Restrictions

☒ Include

Click on a box to update course placement restrictions. Select a

Filter by Term

Filter by Period Schedule

	1ST Day-1	2ND Day-1	3RD Day-1	4TH Day-1
1 Period				
2 Period				
3 Period				
4 Period				
5 Period	⊘	⊘	⊘	⊘
6 Period				
7 Period				
8 Period				
Winter Ath				
Spring Ath				
Extra				
HR				

Add

Replace

Remove

Cancel

The **Batch Edit Course Information** tool will allow you to bulk modify the same values from the individual courses.

*\*Ensure the include checkbox is checked for items you want to update\**



# Build Schedules: Part 2

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- Creating the Master Schedule
- Using the Scheduling Board
- Loading students into their Courses
- Walk-In Scheduler for cleanup
- Elementary scheduling (Part 3)

**\*NOTE: Those using scheduling Board will need to have that portion completed by 6/30\***

# Questions?

We are here to assist throughout this process, so please feel free to contact our META Help Desk for any additional guidance *(add all individuals from your district that are working on calendar/scheduling setup in the email. That way there is understanding throughout your district on the current progress).*

[infinitecampushelp@metasolutions.net](mailto:infinitecampushelp@metasolutions.net)

Also, be on the look out and/or check our website  
(<https://www.metasolutions.net/member-resources/infinitecampus/>)  
for information regarding the future Scheduling Training Dates\*