



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

- 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

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:

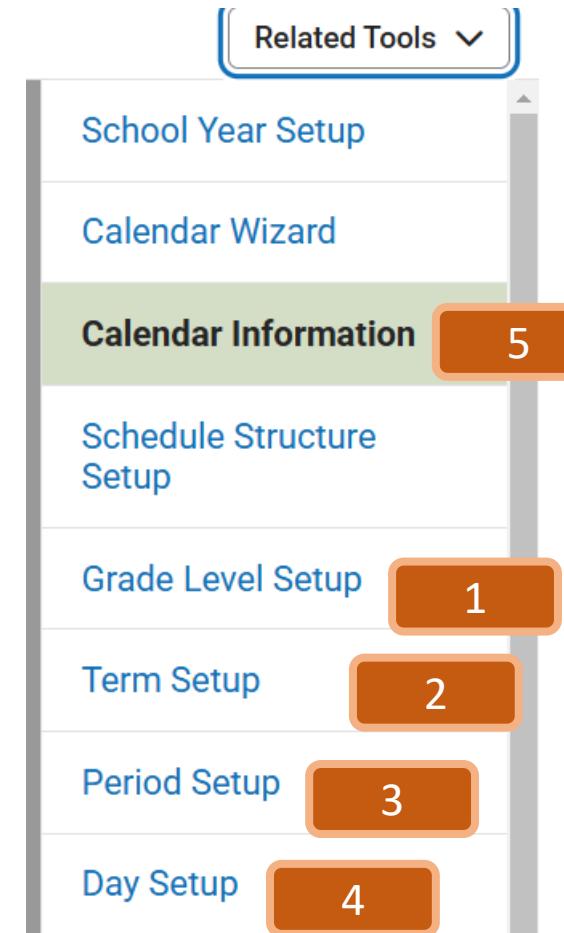
Path: Scheduling & Courses > Calendar Setup > Calendar Information

Calendar Information ★

[Save](#) [Mark for Deletion](#)

Calendar Info

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



1. Grade Levels

Grade Level Setup

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	<input checked="" type="checkbox"/>

Term Detail

*Name	*Sequence	*Start Date	*End Date
1	1	08/15/2025	10/26/2025
2	2	10/27/2025	12/20/2025
3	3	12/21/2025	03/02/2026
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 checked="" type="checkbox"/>	425	455

Period Info

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

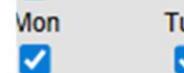
Duration

0

Fill Missing Days Only



Mon



Tue



Wed



Thu



Fri



Sat



Sun

4b. Days: Multi Day Event

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

Instruction

Apply changes to current non school days

Inst. Minutes

Attendance

School Day

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

Instruction

Apply changes to current non school days

Inst. Minutes

Attendance

School Day

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:

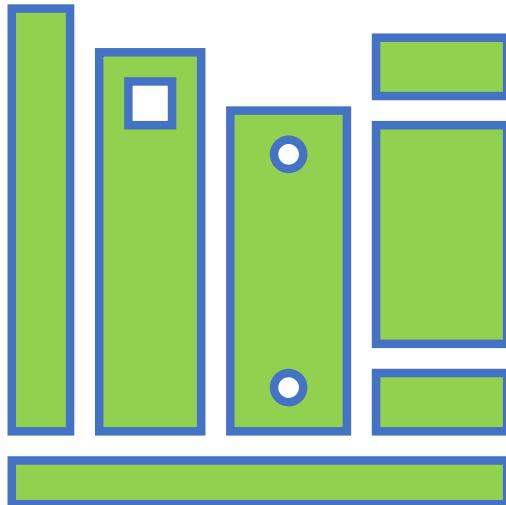
Verify the data on the Calendar Tab is correct.

PeriodSchedule Info				
*Name Daily	*Sequence 1	Exception/Special Day <input type="checkbox"/>	Instructional Minutes 425	School Day 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
*Name 26-27 Harrison High	School 190 Harrison High (schoolID:15)
*Start Date 07/01/2026	Number <input type="text"/>
Student Day (instructional minutes) 425	Sequence <input type="text"/>
Whole Day Absence (minutes) 240	Summer School <input type="checkbox"/>
Type I: Instructional	Exclude <input type="checkbox"/>
Require Student Assignment <input type="checkbox"/>	School Choice <input checked="" type="checkbox"/>
Ignore Master Push <input type="checkbox"/>	External LMS Exclude <input type="checkbox"/>
Comments rolling 02/03/2026 07:50 AM	
Food Service Edit Check (default to blank - no override)	

Rolling Courses



- 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
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Push To Sections"/>										
<div> <p>Course Information CourseID 11060</p> <p>*Number 1001</p> <p>*Name English 9</p> <p>Standards-based <input type="checkbox"/> Active <input checked="" type="checkbox"/> Exclude from State Reporting <input type="checkbox"/> External LMS Exclude <input type="checkbox"/></p> <p>Subject Type Core Academic Subject Area (CORE) <input type="button" value="▼"/> English (ENG) <input type="button" value="▼"/></p> <p>State Code 050160: Integrated English Language Arts I</p> <p>Schedule Load Priority []</p> <p>Max Students 25</p> <p>Department English</p> <p>Terms 4 Schedules 1 Periods 1 Sections to Build 0 Preferred Room Type <input type="button" value="▼"/></p> <p>Course Template Group <input type="button" value="▼"/></p> <p>Bonus Points <input type="checkbox"/></p> <p>Advisory <input checked="" type="checkbox"/> Transcript <input type="checkbox"/> Required <input type="checkbox"/></p> <p>GPA Weight 0</p> <p>Type RG: Regular <input type="button" value="▼"/></p> <p>Honors <input type="button" value="▼"/></p> <p>Homeroom <input type="checkbox"/> Allow student requests <input checked="" type="checkbox"/> Allow teacher requests/recommendations <input checked="" type="checkbox"/></p> <p>CORE Area For Credit ENG: English <input type="button" value="▼"/></p> <p>Comments</p> </div>										

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	Course Rules	Fees	Build Constraints	Assessments	Copy Course																					
+ New Scheduling Rule + New Planning Rule + Save X Delete																										
Rule List <table border="1"> <thead> <tr> <th>Rule Type</th> <th>Rule Detail</th> <th></th> </tr> </thead> <tbody> <tr> <td>Scheduling Rule</td> <td>1290 Algebra 1 A</td> <td>Before</td> </tr> <tr> <td>Scheduling Rule</td> <td>1290 Algebra 1 A</td> <td>Same Section Number</td> </tr> <tr> <td>Scheduling Rule</td> <td>1290 Algebra 1 A</td> <td>Same Period</td> </tr> <tr> <td>Planning Rule</td> <td colspan="2">Equivalent: This course has an equivalent course(s) that may restrict planning.</td> </tr> <tr> <td>Planning Rule</td> <td colspan="2">Grade Level(s): Students may only plan to take this course in a specific grade level(s). Please see course description for more information.</td> </tr> <tr> <td>Planning Rule</td> <td>Parent Of : 1290 Algebra 1 A</td> <td>Parent Of 2290 Algebra 1 B</td> </tr> </tbody> </table>						Rule Type	Rule Detail		Scheduling Rule	1290 Algebra 1 A	Before	Scheduling Rule	1290 Algebra 1 A	Same Section Number	Scheduling Rule	1290 Algebra 1 A	Same Period	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
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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	*Course 2 2290 Algebra 1 B
------------------------------	-------	-------------------------------

Students take Course 1 before taking Course 2

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.

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

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																																	
Before & After		Precedes & Follows																																	
<table border="1"><tr><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>X</td><td>X</td><td>X</td><td>X</td></tr><tr><td></td><td>X</td><td>X</td><td>X</td></tr><tr><td></td><td></td><td>X</td><td>X</td></tr></table>		1	2	3	4	X	X	X	X		X	X	X			X	X	<table border="1"><tr><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>X</td><td>X</td><td></td><td></td></tr><tr><td></td><td>X</td><td>X</td><td></td></tr><tr><td></td><td></td><td>X</td><td>X</td></tr></table>		1	2	3	4	X	X				X	X				X	X
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X	X	X	X																																
	X	X	X																																
		X	X																																

Bind

X = Chemistry 12 X = Chemistry Lab 12

1	2	3	4
X			

Must have both or neither

X = Math 100 X = Math 10

✓ Consecutive

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

Rule List		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
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

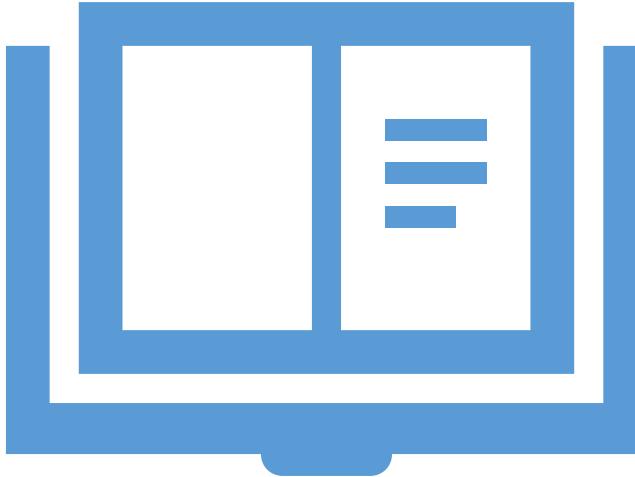


New

The Student Constraints tool creates constraints between one student and another student to reduce their interaction in courses. These constraints are taken into account when 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 student's name in either the Student 1 or Student 2 columns, or both.

Student Constraints		
Student 1	Constraint Type	Student 2
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, Sorcha (G:10#:115419 F)	will not be placed with	Haggar, Nicholas (G:10 #:115419 F)

Scheduling Request



- 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
Enable Academic Plan Tool	Displays information related to a student's course plan
Enforce All Rules	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.
Approval by parent	When marked, parent/guardians have the option to mark a box indicating they have reviewed the plan.
Display Course Fees	Any fees assigned to a course will display when viewing that course in the course catalog search results
Allow to change course plan	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.
Enable Course Registration Tool	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 ☆

View by

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	

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.

Scheduling & Courses > Scheduling > Requests

Student Filter

Filter by Ad Hoc

Unsatisfied Requests

Request Type

Special Education Only

Include Inactive Students

Calendar

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

26-27 Harrison High

1a. Request & Rosters:

Batch Edit Student Request

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

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 ►

3 Student Filter

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 Show Details

Filter Results: 172 out of 850 Students

Berger, Zoey Petal (09)

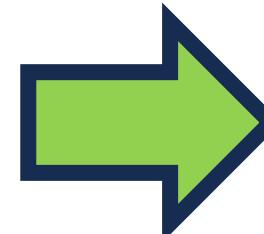
Unsatisfied Requests: 0

Blaha, Danah (09) #03

Unsatisfied Requests: 0

Campus, Ethan (09) #1

◀ ▶ 1 2 ▶ ▶



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 Number or Name

3100 English 9

Department

Select items...

COURSE

DEPARTMENT

REQ TYPE

✓ 3100 English 9

English

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

Adkins , Tristen J Permanent Requirements
Grade: 10 #223801 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 <input type="text"/> 1101 English 10 - 1.00	0.00 / 1.00 <input type="text"/> 1001 English 9 - 1.00 RETAKE 1101 English 10 - 1.00 1201 English 11 - 1.00 12345 Training Course - 1.00 1301 English 12 - 0.50	0.00 / 1.00 <input type="text"/> Type to search or select courses
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 <input type="text"/>	0.00 / 0.00 <input type="text"/> Type to search or select courses	0.00 / 0.00 <input type="text"/> Type to search or select courses
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 <input type="text"/>	0.00 / 0.00 <input type="text"/>	0.00 / 0.00 <input type="text"/>
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 <input type="text"/>	0.00 / 1.00 <input type="text"/> Type to search or select courses	0.00 / 1.00 <input type="text"/> Type to search or select courses
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 <input type="text"/>	0.00 / 0.00 <input type="text"/> Type to search or select courses	0.00 / 0.00 <input type="text"/> Type to search or select courses
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 <input type="text"/> 2221 Biology I - 0.50	0.00 / 1.00 <input type="text"/> Type to search or select courses	0.00 / 0.00 <input type="text"/> Type to search or select courses
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 <input type="text"/> 2021 American Studies 10 - 1.00	0.00 / 1.00 <input type="text"/> Type to search or select courses	0.00 / 1.00 <input type="text"/> Type to search or select courses

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.

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
<input type="button" value="Save"/>			
Name ▲	Future Enrollment	Recommended Courses	
11 Student, Andrew T	14-15 T F Riggs High School	<input type="button" value="x 580512 AP Calculus (B)"/> <input type="button" value="x 999990 College Algebra Math 102 (CUC)"/>	
10 Student, Bree W	14-15 T F Riggs High School	Type to search or select courses	
09 Student, Brooke J	14-15 T F Riggs High School	<input type="button" value="x 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="x 580512 AP Calculus (B)"/>	

2c. Academic Plan-Campus Student

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.

Academic Plan Search the Course Catalog

Program: Grad Plan (Graduation) Counselor: Counselor, Marlow

Approved by parent/legal guardian

ALERT: Insufficient Academic Program participation: Tech CTE Req

Grade: 09	Grade: 10	Grade: 11	Grade: 12
12.0 / 12.0	13.0 / 12.0	10.5 / 12.0	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
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 II 1 - 1.0 4011 Algebra II 2 - 1.0	1400 OLL: Probability & Statistics - 1.0	1400 Functions, Stats & Trig - 1.0 4606 Statistics II - 1.0

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

ALERT: Insufficient Academic Program participation: Tech CTE Req

2d. Course Plan to Request:

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

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.

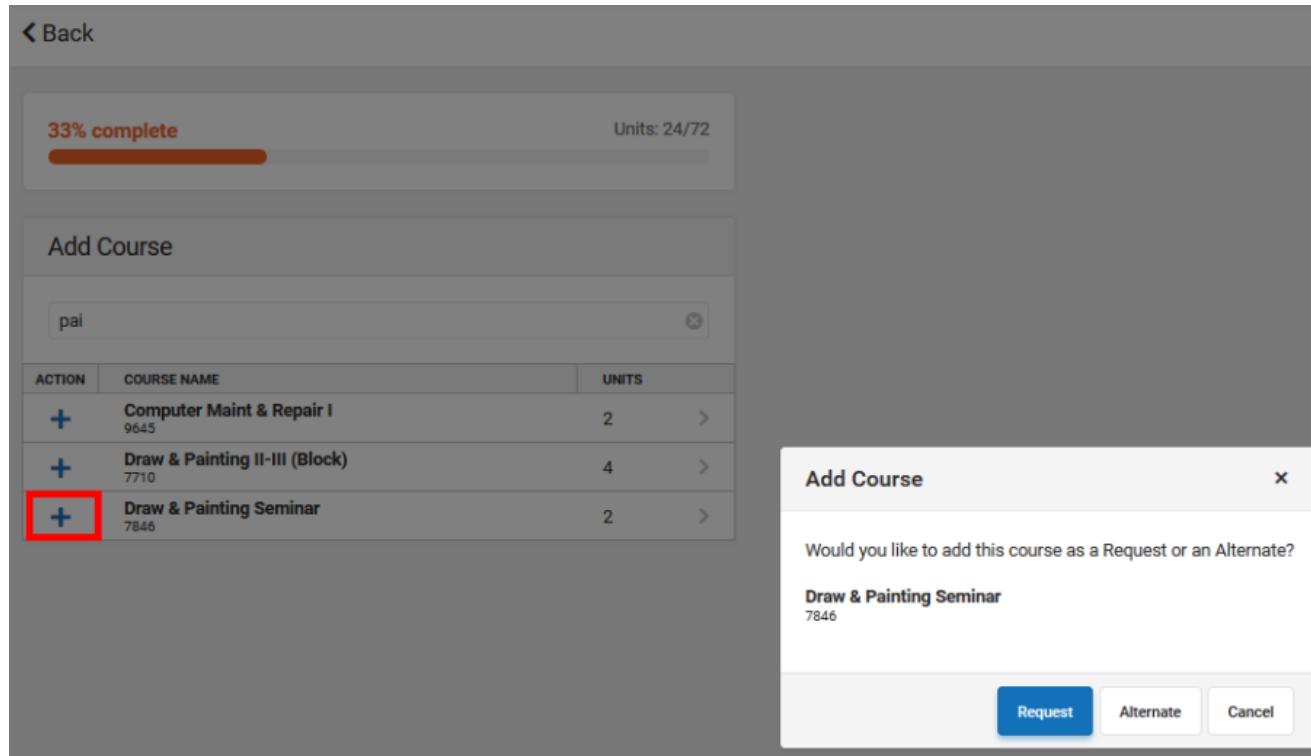
Important Note:

- ❖ 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



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	4 (04/02/18 - 06/29/18)	Section	7) 3100-11 US History A
<input type="button" value="Save"/>			
Name ▲	Future Course Request		
10 Student, Andrew	2350 US History B		
10 Student, Bree	2350 US History B		
10 Student, Brooke J	---Select Course--- 2300 US History A 2350 US History B		
Student, Kyle M	---Select Course---		
Student, Luke C	Student is not yet future enrolled.		
Student, Lydia J	---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						Requests > Search <	Requests Scheduling Units: $\frac{6}{32}$		Add Requests			
		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									
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									

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*)

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

Generate Report | Submit to Batch

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 print one page per student. Since detail data is reported, this report could take a while to generate if you select to print many students.

Request Type: All

Display Only Active Courses:

Department:

Course: OR

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

Ad Hoc Filter:

Sort Options: Alpha Grade/Alpha

Report Format: PDF

Generate Report | Submit to Batch

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 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:

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

35

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

Filter by Name Filter by Department Filter by Ad Hoc

Algebra, Professor * (07/01/2011)	PLACEMENT RESTRICTIONS
Max Periods: (8) Max Courses: (8) Max Con Periods: (8) Team: None FTE %: 100 Courses: 1 10 ALG 1880 Algebra II	Min Sections: 3 3 Max Sections: 3 3 Rooms: 1 545 (1) <input type="button" value=">"/>
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: 1 542 (1) <input type="button" value=">"/>

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

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	🚫	🚫	🚫	🚫
3 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

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

Staff, Elliot | Social Studies (08/03/2017)

Max Periods: (7) Max Courses: (7) Max Con Periods: (7) Team: None

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 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 will overwrite the previous data.

Staff Planner: Batch Edit Constraints

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 

Filter by Name

X

X

X

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

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

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)

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.

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	🚫	🚫	🚫



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.

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 ↓

06 ELA 6 English/Language Arts | English

Requests: Current 26 ↓

06 MATH 6 Math | Math

Requests: Current 26 ↓

06 MUS Music | Music

Requests: Current 26 ↓

06 PE Physical Education | Physical Education

Requests: Current 26 ↓

Sections: Needed 3 ↑ To Build 5 Placed 1 Remaining Seats 24

Sections: Needed 0 ↓ To Build 5 Placed 1 Remaining Seats 224

Sections: Needed 0 ↓ To Build 5 Placed 1 Remaining Seats 224

Course: Terms 1 Schedules 1 Period 1 Priority Max Students 8 10

Course: Terms 4 Schedules 1 Period 2 Priority Max Students 1 50

Course: Terms 4 Schedules 1 Period 2 Priority Max Students 1 50

Course: Terms 1 Schedules 1 Period 1 Priority Max Students 8 50

Course: Terms 1 Schedules 1 Period 1 Priority Max Students 8 50

Constraints: Teachers 1 Rooms 0 Rules 0

Constraints: Teachers 0 ⚠️ Rooms 0 Rules 0

Constraints: Teachers 2 Rooms 0 Rules 0

Constraints: Teachers 0 ⚠️ Rooms 0 Rules 0

Constraints: Teachers 4 Rooms 0 Rules 0

Batch Edit Course Batch Edit Constraints Print

Feedback 📣

- **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.

- **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

06 ART Art | General Education

Requests
Current 26 ↓
Last Year 34

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

Teachers & Rooms

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

Filter by Teacher Name, Department or Team

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)

Filter by Room or Room Type

ROOM	PRIORITY *
ART	1

Rules
Placement Restrictions

Filter the list prior to using batch edit options

Course Planner: Batch Functionality

41

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 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

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 section

Collapse All

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**

Build Schedules: Part 2



- 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

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*