Scheduling Training: Part 1

February 11, 2026

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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

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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

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
✕	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.

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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.

- **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

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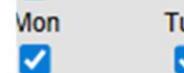
4b. Days: Multi Day Event

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

☐ Apply changes to current non school days

*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

☐ Apply changes to current non school days

*Type
NS: No School

Duration
[   ]

Inst. Minutes
[   ]

☐ Instruction   ☐ Attendance   ☐ School Day

Save Multi Day Event

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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	☐	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: Sequence:

*Start Date: 07/01/2026 *End Date: 06/30/2027 Summer School ☐

Student Day (instructional minutes): 425 Teacher Day (minutes): 430 Exclude ☐

Whole Day Absence (minutes): 240 Half Day Absence (minutes): 180 School Choice ☑

Type: I: Instructional

Require Student Assignment ☐ External LMS Exclude ☐

Ignore Master Push ☐

Comments: rolling 02/03/2026 07:50 AM

Food Service Edit Check: (default to blank - no override)

Rolling Courses
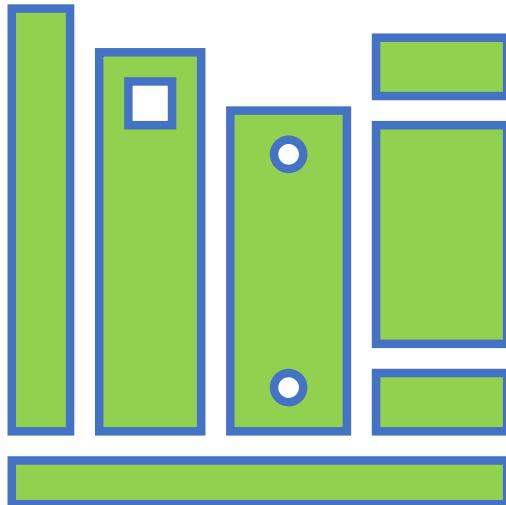
- After the previous steps have been completed, notify META and we will get your courses rolled for you.

- 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.*

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.

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

1290 Algebra 1 A

| Course | Sections | Grading Tasks | Standards | Categories | Curriculum Planner |
| Grade Calc Options | **Course Rules** | Fees | Build Constraints | Assessments | Copy Cou |

➕ New Scheduling Rule   ➕ New Planning Rule   💾 Save   ❌ Delete

Rule List

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

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.

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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			

X = Math 100   X = Math 101

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

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⊕ New Scheduling Rule   ⊕ New Planning Rule   💾 Save   ⊗ Delete

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)   Preview
1203

Credits	Min GPA Value
1	3

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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 take
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
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

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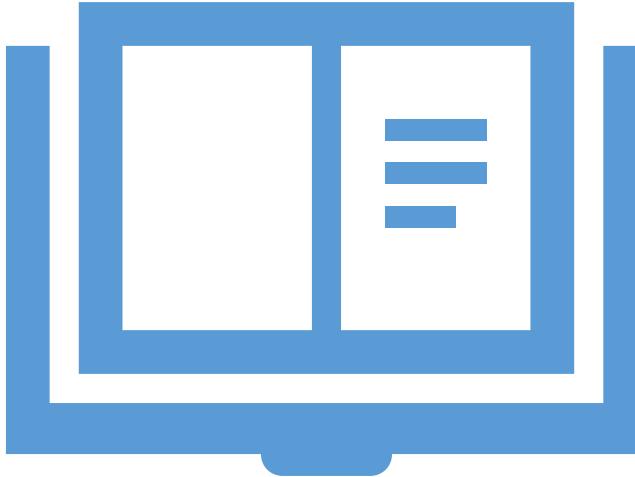
- There are several options for how students may receive Scheduling Request based on your district settings.

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

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 s

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 select 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.

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1b, Request & Rosters:

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

Requests & Rosters

View by
Students | Courses

Show De

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** 2 ► ►|

Batch Edit Student Requests
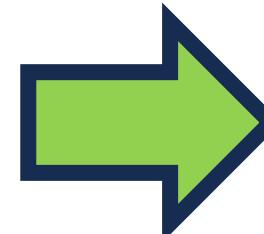
Batch Edit Student Request Information

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 Number or Name   **Department**

3100 English 9 ⊗   Select items...

Unselect All

COURSE	DEPARTMENT	REQ TYPE ▼ ⊥
✓ 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.

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

Save

Name ▲	Future Enrollment	Recommended Courses
11 Student, Andrew T	14-15 T F Riggs High School	580512 AP Calculus (B) 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	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	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.

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

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
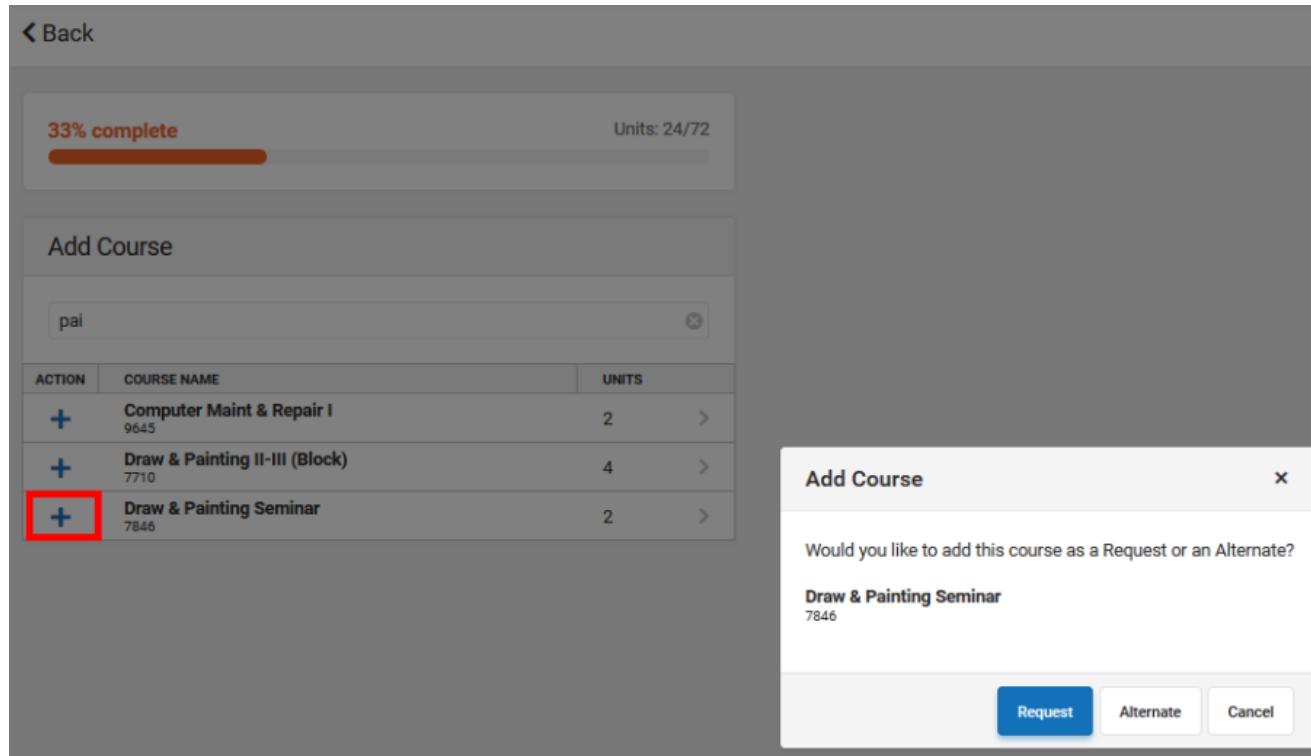
Important Information:

❖ 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 ▼

Save

Name ▲	Future Course Request
10 Student, Andrew	2350 US History B ▼
10 Student, Bree	2350 US History B ▼
	----Select Course----
	2300 US History A
10 Student, Brooke J	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.

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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

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)*

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.

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   3   3   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

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

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

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.*

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

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.

- **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 ★   Scheduling & Courses > Scheduling > Course Planner

Filter ⌃

Filter by Course Number or Name   Filter by Department   Filter by Ad Hoc
Select items...   Select items...   No Filter

06 ART Art | General Education   PLACEMENT RESTRICTIONS

Requests		Sections				Course					Constraints		
Current		Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Period	Priority	Max Students	Teachers	Rooms	Rules	
26 ↓		3 ↑	5	1	24	1	1	1	8	10	1	0	0	

06 ELA 6 English/Language Arts | English   PLACEMENT RESTRICTIONS

Requests		Sections				Course					Constraints		
Current		Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Period	Priority	Max Students	Teachers	Rooms	Rules	
26 ↓		0 ↓	5	1	224	4	1	2	1	50	0 ⚠	0	0	

06 MATH 6 Math | Math   PLACEMENT RESTRICTIONS

Requests		Sections				Course					Constraints		
Current		Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Period	Priority	Max Students	Teachers	Rooms	Rules	
26 ↓		0 ↓	5	1	224	4	1	2	1	50	2	0	0	

06 MUS Music | Music   PLACEMENT RESTRICTIONS

Requests		Sections				Course					Constraints		
Current		Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Period	Priority	Max Students	Teachers	Rooms	Rules	
26 ↓		0 ↓	5	1	224	1	1	1	8	50	0 ⚠	0	0	

06 PE Physical Education | Physical Education   PLACEMENT RESTRICTIONS

Requests		Sections				Course					Constraints		
Current		Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Period	Priority	Max Students	Teachers	Rooms	Rules	
26 ↓		0 ↓	5	1	224	1	1	1	8	50	4	0	0	

Batch Edit Course   Batch Edit Constraints   Print   ⛶   Feedback 💬

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 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 sectio

[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]

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*