



Custom Computer Specialists  
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# *Counselor Manual*

*Infinite*   
**Campus**

Prepared by:  
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Professional Development Team





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## ***Infinite Campus and Custom Computer Specialists, Inc.***

### ***About Infinite Campus***

Infinite Campus is a comprehensive, Web-based K-12 student information system (SIS) with real-time access to administration, instruction, communication, curriculum, reporting and analysis, data warehousing functionality and more. For more than 20 years, Infinite Campus has successfully implemented its solutions for customers of all sizes. Managing 7.8 million students in 45 states, Infinite Campus is the most trusted name in student information. Infinite Campus customers range from school districts with fewer than 100 students to those with more than 600,000, as well as regional consortia, state departments of education and the federal government.

### ***About Custom Computer Specialists, Inc.***

Headquartered in Hauppauge, NY, Custom Computer Specialists, Inc., is a leading privately held Long Island based technology solution provider. Custom delivers a wide array of technology services including: project management, on-site staffing, managed services, networking and wireless solutions, desktop installation, and service and support.



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## COUNSELOR MANUAL

The purpose of the Counselor manual is to aid counselors in learning the functions of the Counseling tools including the Walk-In Scheduler used for scheduling students. Other areas included in the manual are the Scheduling Messenger and the Counseling Tabset.

### Target Audience

This manual is intended for School Counselors and any other staff member who needs to create or change an individual student's schedule and/or transcript within the Counseling Tabset.

### Vocabulary

**Period** – The period is the scheduled timeframe for courses (i.e., Period 1 meets 8:00-8:40; Period 2 meets 8:45-9:25).

**Schedule** – This is used to represent the student's schedule of courses. It is also used to represent the rotation of courses that do not meet every day (i.e., a school has courses that meet every other day – they are set up as Day Schedule A or Day Schedule B).

**Term** – Term represents a school time period for which grades are recorded (i.e., term, quarter, trimester). For example, some courses are full year courses (they meet all terms), some are ½ year courses (they meet in the Fall [Term 1 and 2] or Spring [Term 3 and 4]).

**Required** – Required courses are coded with an 'R' in the Walk-in Scheduler. They are usually added by the Request Wizard and the scheduling staff when creating schedules. The Schedule Wizard will attempt to fill all required courses.

**Elective** – Elective course requests are added by the student if the on-line student portal is used. The counselor can also add courses as 'electives' using the Walk-in Scheduler if the school separates 'required' and 'elective' courses. The Schedule Wizard will attempt to fill all elective courses.

**Alternate** – Alternate course requests are added by the student if the on-line student portal is used. The counselor can also add 'alternate' courses using Walk-in Scheduler. The Schedule Wizard will **not** attempt to fill alternate courses. They are entered to assist the Counselor when completing a student's schedule if the other courses cannot be filled.

**Year** – The year on the top of the Infinite Campus screen is used to choose the school calendar year in which to make changes. **It is very important to be in the correct calendar year when working on the students' schedules.**

## SCHEDULING PROCESS

### *Sequence of Events*

It is important to understand the sequence of events when the schedule is being developed for the next school year. In addition, the school's schedulers should keep in close contact with the Guidance Counselors and any other staff members who might work on a student's schedule.

After a Calendar has been created for the coming school year, this is the typical sequence of events.

1. The courses are adjusted if necessary (i.e., adding new ones, making obsolete ones inactive), sections are added based on seat counts, and scheduling rules are added, reviewed, and edited.
2. Student Course Requests are entered. They can be loaded manually through the Walk-In Scheduler, en masse through the use of the Request Wizard, en masse through the use of the Multi-Year Academic planner (MYAP), via online registration in the portal, or by the students' teachers. Many schools use a combination of the above methods.
3. Changes to the students' requests are completed. There are many instances where all the students' requests cannot be created en masse using the Wizard and will need to be added or changed manually. For example, all 9<sup>th</sup> graders might be given a request for 'Spanish 9', schedulers or counselors will change the course request to 'French 9' or 'Italian 9' if the individual student requests a different language. In addition, requests for elective courses (i.e., Music, Art, Drama) are rarely entered using the wizard and will need to be added manually.
4. The school's schedulers will run the Schedule Wizard and attempt to fill all the students' requests. They will run this multiple times in an attempt to satisfy as many requests as possible.
5. When the schedule is built and students are rostered into courses/sections, the school's schedulers can address students' unsatisfied requests and complete their schedules using the Walk-in Scheduler.



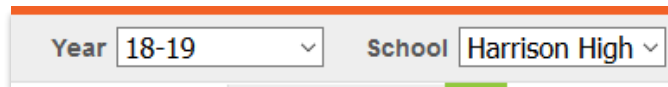
#### **Special Note:**

Often several of these steps will run concurrently, therefore when counselors are changing students' requests, they may see partial schedules on the screen.

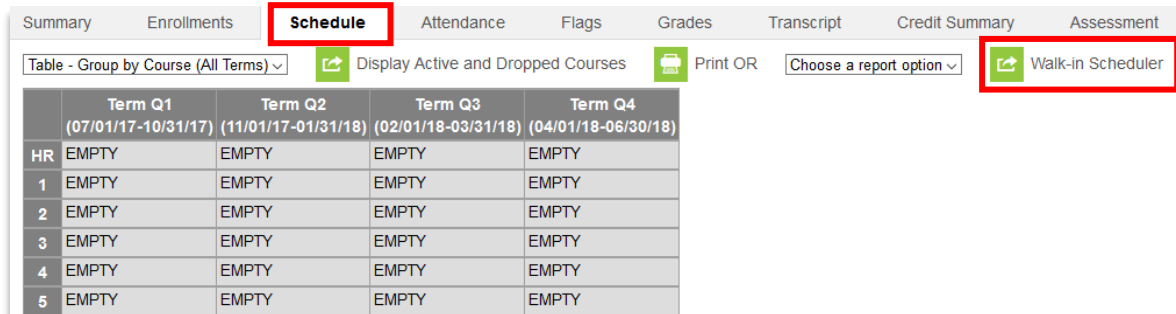
## ADD OR CHANGE COURSE REQUESTS

Every year, the school administrators will create the calendar for the coming academic year. School counselors and scheduling staff will use the various request tools to create requests for the students. The Walk-in Scheduler can be used to change existing requests (i.e., change 'English 10' to 'English 10H' for a student entering the honors program), and to add elective and alternate requests.

1. Choose the correct *Year* and *School*. This is usually the next school calendar year.



2. Navigate to *Student Information > General*.
3. Use Student search tool to locate the desired student.
4. Click on the **Schedule** tab.



	Term Q1 (07/01/17-10/31/17)	Term Q2 (11/01/17-01/31/18)	Term Q3 (02/01/18-03/31/18)	Term Q4 (04/01/18-06/30/18)
HR	EMPTY	EMPTY	EMPTY	EMPTY
1	EMPTY	EMPTY	EMPTY	EMPTY
2	EMPTY	EMPTY	EMPTY	EMPTY
3	EMPTY	EMPTY	EMPTY	EMPTY
4	EMPTY	EMPTY	EMPTY	EMPTY
5	EMPTY	EMPTY	EMPTY	EMPTY

5. Click on the <Walk-in Scheduler> button. The screen will display the student's schedule on the left (this is usually empty at this point) and the course requests on the right. The course requests will have all the standard requests previously created from the Request Wizard.

If request changes are made after the scheduler has started working with the Schedule Wizard, the schedule on the left might have courses listed.



**Carr, Shayla**  
Grade: 10 #108283 DOB: 12/19/2001

Fees Lockers Graduation

Summary Enrollments **Schedule**

Table - Group by Day (All Terms) [Dis]

Load Unload End Restore Search

Effective Date [ ] Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	EMPTY	EMPTY	EMPTY	EMPTY
2	EMPTY	EMPTY	EMPTY	EMPTY
3	EMPTY	EMPTY	EMPTY	EMPTY
4	EMPTY	EMPTY	EMPTY	EMPTY
5	EMPTY	EMPTY	EMPTY	EMPTY
6	EMPTY	EMPTY	EMPTY	EMPTY
7	EMPTY	EMPTY	EMPTY	EMPTY
8	EMPTY	EMPTY	EMPTY	EMPTY
9	EMPTY	EMPTY	EMPTY	EMPTY

*Requested Units* represents the number of units requested and the Maximum Units for the schedule.

Maximum Units are calculated as follows:  
Periods \* terms \* schedules (i.e., A and B)

Save Reqs X Clear Reqs Get Sched Reqs

Requested Units: (76/144)

Course #	Course Name	Sn#	Type
1300	Integrated Math III		R
2100	Geography A		R
2150	Geography B		R
2630	Non-Western Cultures		E
3200	English 10		R
3250	English 10 B		R
4200	Biology A		R
4250	Biology B		R

The Course # (number) and Name will display.

All requests created by the Request Wizard will display with a *Type* of **R** (Required).

6. To change a course:

- a. Type the new course number over the existing course number.
- b. Click on the <Save Reqs> button.

7. To add a course:

- a. Click on a blank box in the *Course #* field.
- b. Type the course number.
- c. Choose the correct 'Type' for the request:
  - R = Required (this is the system default, the Schedule Wizard will schedule this course)
  - E = Elective (the Schedule Wizard will schedule this course)
  - A = Alternate (the Schedule Wizard will **not** schedule this course)
- d. Click on the <Save Reqs> button. The Requested Courses will be saved and display in alpha/numeric order by *Course #*.



**Special Note:**

If a course number entered is incorrect, the system does not display an error, but the course will disappear from the screen after clicking on the <Save Reqs> button. Therefore, check the schedule and course numbers carefully.



Save Reqs X Clear Reqs Get Sched Reqs

Requested Units: (64/144)

@	Course #	Course Name	Sn#	Type	Lock
@	1300	Integrated Math III		R v	
@	2100	Geography A		R v	
@	2150	Geography B		R v	
@	3200	English 10		R v	
@	3850	Creative Writing		R v	
@	4200	Biology A		R v	
@	4250	Biology B		R v	
@	5120	Spanish II		R v	
@	2630	Non-Western Cultures		E v	
@	6000	2D Foundations A		E v	
@	6810	AP Art History		A v	

Changed 'English 10B' to 'Creative Writing'

Added Elective: '2D Foundations A'

## SCHEDULE A NEW STUDENT

When a student enrolls in the school after the scheduling process for the coming year has been completed, the student's schedule must be created using the Walk-in Scheduler.

There are two ways to create a schedule:

1. Create the schedule 'on paper' by using the Master Schedule report, determining the courses and sections needed by period. The 'Search' feature may be used to produce the student's schedule.
2. Input the course numbers needed into the Walk-in Scheduler's Request section and use the 'Load' feature. The Scheduler will determine the best schedule for the student using the scheduling rules and seat availability. **Note: The 'Load' feature should only be used to create a new schedule, never to change an existing schedule.**



When using the Walk-in Scheduler to create a student's schedule using either method, the courses entered save automatically.


Be aware that the student may display in Attendance, then disappear as changes are made.

### Create a Schedule Using the 'Search' Feature

This feature is to be used when creating a schedule 'on paper' first, then putting in it period-by-period into the student's schedule.

1. Choose the *Year* and *School* calendar for the appropriate academic year.

Year	18-19	▼	School	Harrison High	▼
------	-------	---	--------	---------------	---

1. Navigate to *Student Information > General*.
2. Use the Search tool to locate the desired student.
3. Click on the Schedule tab.
4. Click on the <Walk-in Scheduler> button. The screen will display the student's schedule on the left and the course requests on the right (they are both empty at this point).
5. Click on the <Search> button  Search . The course requests section on the right will change to display the Section Search feature.
6. Enter search criteria. A user can search using any of the fields listed. The more fields completed, the more precise the resulting list will be. When entering



information, it must be exact to match for the search (i.e., *Course Number* 0200, not 200). Search criteria for entering courses scheduled 'on paper' usually include the *Course Number* and the *Period*.

Enter the Search criteria. Usually the *Course Number* & *Period* are entered.

If using Rotating Day Schedules, inputting the Day in the *Schedule* field will customize the search further.

**Section Search**

Start Date

Course Number

Course Name

Department

Teacher

Term

Period

Schedule

**Search**

**3200 English 10**

3200-1 (38/30) Haberney, Jeta T:1-2 P:4 IEPs: 0

3200-2 (29/30) Haberney, Jeta T:1-2 P:6 IEPs: 0

3200-3 (37/30) Haberney, Jeta T:1-2 P:2 IEPs: 0

Click on the <Search> button to display the results of the search.

Sections that are full (or overbooked) display in red.

7. Click on the <Search> button in the Section Search box. The system will display all the courses that match the criteria. The courses display with all pertinent information:

- Course number and section number (i.e., 3200-1, 3200-2, 3200-3).
- Students in roster/maximum number of students (i.e., 30/30 [full class], 25/30 [class has 5 seats empty]). Any sections that are full or overbooked will display in red.
- Teacher name – last name, first name (i.e., Haberney, Jeta).
- Terms – the terms that the section meets (i.e., T: 1-4 is a section that meets all year, T: 1-2 is a section that meets in the Fall only).
- Period – the period that the section meets (i.e., P:5, P:6).
- Schedules – if applicable, the schedule will display (i.e., S:A is a section that meets on A days, S:B is a section that meets on B days). If the school has more than 2 rotating days, the first day the section meets and the last day the section meets will display (i.e., S:A-C is a section that meets on A and C or A, B and C). If the section is taught on all days, no schedule will display:

3200-2 (29/30) Haberney, Jeta T:1-2 P:6 IEPs: 0



- IEPs – if the district is using Campus’ Special Education program, the number of students in the section roster with IEPs will display (i.e., *IEPs: 1*).
- The system automatically inputs a Start date. The default date is the first day of school, if the course is being added prior to the start of school year. The default date is the current date, if the course is being added after the school year has started. It is recommended to change this date to the student’s actual enrollment start date. If no date (or the wrong date) is entered, the student may display on Roster reports before he/she starts. **Note:** *Warning messages will appear when the start date is entered on the schedule that is before the student’s enrollment start date.*
  - To add a course to the student’s schedule, click on the course/section. It will display on the left, in the student’s schedule. As soon as the course displays in the student’s schedule, the student is rostered and will appear in the teacher’s class (the student will not display on the Attendance form until the enrollment Start Date).

Effective Date  Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	EMPTY	EMPTY	EMPTY	EMPTY
2	EMPTY	EMPTY	EMPTY	EMPTY
3	EMPTY	EMPTY	EMPTY	EMPTY
4	EMPTY	EMPTY	EMPTY	EMPTY
5	EMPTY	EMPTY	EMPTY	EMPTY
6	3200-2 (Day A, C, D) English 10 Start: 09/22/2017	3200-2 (Day A, B, D) English 10 Start: 09/22/2017	EMPTY	EMPTY
7	EMPTY	EMPTY	EMPTY	EMPTY
8	EMPTY	EMPTY	EMPTY	EMPTY
9	EMPTY	EMPTY	EMPTY	EMPTY



**When using the Search feature of the Walk-in Scheduler to create a student’s schedule, the ‘Scheduling Rules’ set at the course level do not apply.**

**Courses will display in red (instead of blue) in the schedule when they are completely full (or overbooked). Only users with the appropriate User Rights will be able to add students to red sections.**

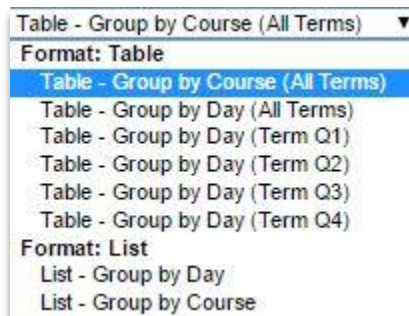
- Repeat steps 5 – 9 for all courses needed.





## Print the Student's Schedule

1. To print the schedule for the student, click the <View Schedule> button on the tool bar. This will refresh the screen and display the student's schedule. Click on the <Display Active Courses Only> button to exclude dropped classes from the display and report. Click on the <Display Active and Dropped Courses> button to include a history of schedule changes in the display and report.
2. Change the *Format* in the dropdown box to view or print different formats of the schedule. The *Format* selected will become the new default format for the user.



3. Click on the <Print OR> button. The schedule will display in a new window using Adobe Reader.
4. The student's schedule will print all the courses in the periods/terms they meet, along with the room numbers and teacher's names. The header includes the school information, the student information, and the date/time the schedule was printed.
5. Click on the <Print> icon in the Adobe window to print the schedule. Close the Adobe window by clicking on the <Close> (X) button in the top right corner.



Example Four-Term Schedule

<b>17-18</b> <b>Hippo High</b> 10 Wheatleigh Avenue, St. James NY 11780 Generated on 09/22/2017 02:35:52 PM Page 1 of 1		<b>Student Schedule For Barros, Trinidad</b> Grade: 09 Student Number: 1817170003 Term(s): All Courses enrolled: 14 Mailing Address: 222 Avalon Lake Road, St. James, NY 11780		
	Term 1 (07/03/17- 10/06/17)	Term 2 (10/09/17- 12/29/17)	Term 3 (01/01/18- 03/30/18)	Term 4 (04/02/18- 06/29/18)
1	1200-1 (Day B, C, D) Integrated Math II Hader, Rory Rm: 40 Start: 09/11/2017	1200-1 (Day A, C, D) Integrated Math II Hader, Rory Rm: 40	1200-1 (Day A, B, D) Integrated Math II Hader, Rory Rm: 40	1200-1 (Day A, B, C) Integrated Math II Hader, Rory Rm: 40
2	2100-1 (Day B, C, D) Geography A Haag, Hakim Rm: 30 Start: 09/11/2017	2100-1 (Day A, C, D) Geography A Haag, Hakim Rm: 30	2150-1 (Day A, B, D) Geography B Haag, Hakim Rm: 30	2150-1 (Day A, B, C) Geography B Haag, Hakim Rm: 30
3	4200-1 Biology A Hader, Rory Rm: 10 Start: 09/11/2017	4200-1 Biology A Hader, Rory Rm: 10	4250-1 Biology B Hader, Rory Rm: 10	4250-1 Biology B Hader, Rory Rm: 10
4	5520-1 (Day A, C, D) French II Start: 09/11/2017	5520-1 (Day A, B, D) French II	5520-1 (Day A, B, C) French II	5520-1 (Day B, C, D) French II
L	EMPTY	EMPTY	EMPTY	EMPTY
6	7650-2 (Day A, B, C) Personal Fitness I Start: 09/11/2017	7650-2 (Day B, C, D) Personal Fitness I	2660-2 (Day A, C, D) Contemporary World Issues Clement, Donald Rm: 40	2660-2 (Day A, B, D) Contemporary World Issues Clement, Donald Rm: 40
7	7150-1 (Day A, B, D) Health 9 Start: 09/11/2017	7150-1 (Day A, B, C) Health 9	8710-2 (Day A, B, D) C++ Programming	8710-2 (Day A, B, C) C++ Programming
8	3100-1 (Day B, C, D) English 9 Harding, Jocasta Rm: 20 Start: 09/11/2017	3100-1 (Day A, C, D) English 9 Harding, Jocasta Rm: 20	3150-1 (Day A, B, D) English 9 B Harding, Jocasta	3150-1 (Day A, B, C) English 9 B Harding, Jocasta
9	8720-1 (Day A, C, D) Java Programming Start: 09/11/2017	8720-1 (Day A, B, D) Java Programming	8730-1 (Day A, B, D) Game Design	8730-1 (Day A, B, C) Game Design

### Create a Schedule Using the 'Course Request' and 'Load' Features

These features are to be used when the system should create the student's schedule based on the requests entered. The system will not overbook a section and will follow all scheduling rules. The *Load* feature should only be used to create a schedule for a **new student**. It should never be used to edit an existing student's schedule.

1. Choose the *Year* and *School* calendar for the appropriate school year.

Year	17-18	School	Hippo High
------	-------	--------	------------

2. Navigate to *Student Information > General*.
3. Use the Search feature to find the desired student.
4. Click on the Schedule tab.



5. Click on the <Walk-in Scheduler> button. The screen will display the student's schedule on the left and the course requests on the right (they are both empty).
6. Click on a blank box in the *Course #* field.
7. Type the course number needed. Repeat for all course numbers. The *Type* field will default to 'R' indicating 'required course'.

Save Reqs X Clear Reqs Get Sched Reqs

Requested Units: (0/144)

@	Course #	Course Name	Sn#	Type	Loc
	1200			R v	
	2100			R v	
	2150			R v	

8. Click on the <Save Reqs> button. The system will save the requests and sort them in alpha/numeric order.

Save Reqs X Clear Reqs Get Sched Reqs

Requested Units: (68/144)

@	Course #	Course Name	Sn#	Type	L
@	1200	Integrated Math II		R v	
@	2100	Geography A		R v	
@	2150	Geography B		R v	
@	3175	Honors English		R v	
@	4200	Biology A		R v	
@	4250	Biology B		R v	
@	5120	Spanish II		R v	
@	6000	2D Foundations A		E v	
@	7100	Physical Education 9		R v	
@	7150	Health 9		R v	

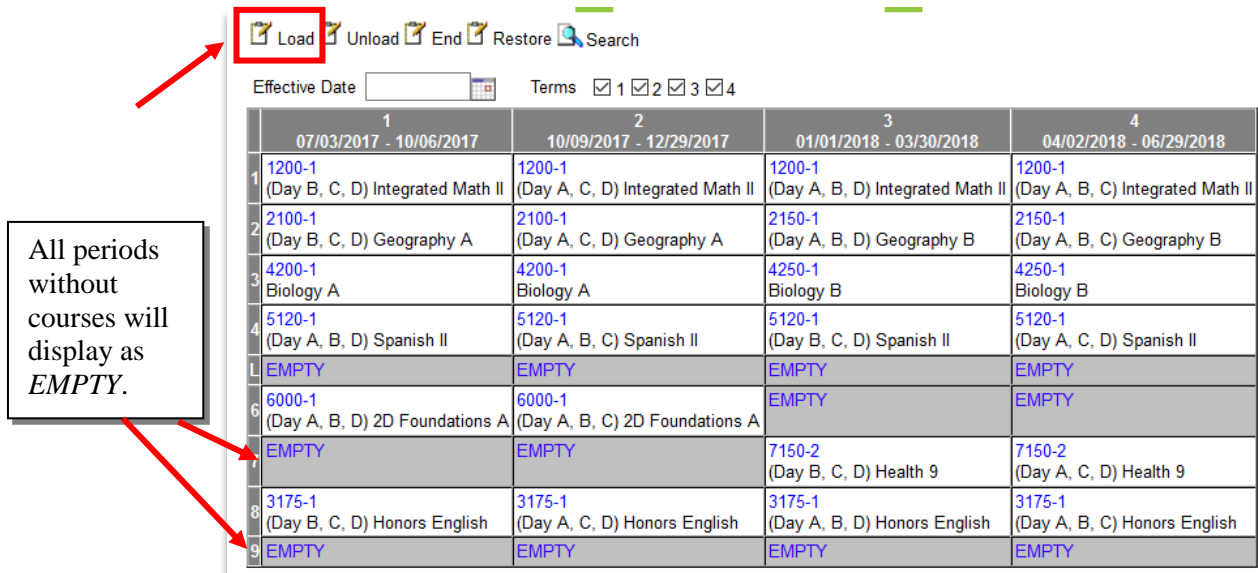


### Special Note:

If the course number entered is incorrect, the system will not display an error. The course number will disappear from the screen after clicking on the <Save Reqs> button. Therefore, check the schedule/course numbers carefully.

Click on the <Load> button. The system will display a warning that it is loading the requests into the student's schedule. Press <ENTER> or click on the <OK> button.

9. All course/sections that could be scheduled will display in the schedule on the left.



Effective Date  Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2	2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
3	4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
4	5120-1 (Day A, B, D) Spanish II	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II
5	EMPTY	EMPTY	EMPTY	EMPTY
6	6000-1 (Day A, B, D) 2D Foundations A	6000-1 (Day A, B, C) 2D Foundations A	EMPTY	EMPTY
7	EMPTY	EMPTY	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
8	3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English
9	EMPTY	EMPTY	EMPTY	EMPTY

10. All the courses that were loaded will display on the right with the section number (Sn#). Any course that could not be loaded will not have a section number.

Requested Units: (92/144)

@	Course #	Course Name	Sn#	Type	Lock
@	1200	Integrated Math II	1	R ▾	<input type="checkbox"/>
@	2100	Geography A	1	R ▾	<input type="checkbox"/>
@	2150	Geography B	1	R ▾	<input type="checkbox"/>
@	3175	Honors English	1	R ▾	<input type="checkbox"/>
@	4200	Biology A	1	R ▾	<input type="checkbox"/>
@	4250	Biology B	1	R ▾	<input type="checkbox"/>
@	5120	Spanish II	1	R ▾	<input type="checkbox"/>
@	6810	AP Art History		E ▾	<input type="checkbox"/>
@	6820	AP Music Theory		E ▾	<input type="checkbox"/>
@	7100	Physical Education 9		R ▾	<input type="checkbox"/>
@	7150	Health 9	2	R ▾	<input type="checkbox"/>
@	6000	2D Foundations A	1	E ▾	<input type="checkbox"/>

Courses that could NOT be loaded will not have a Sn#

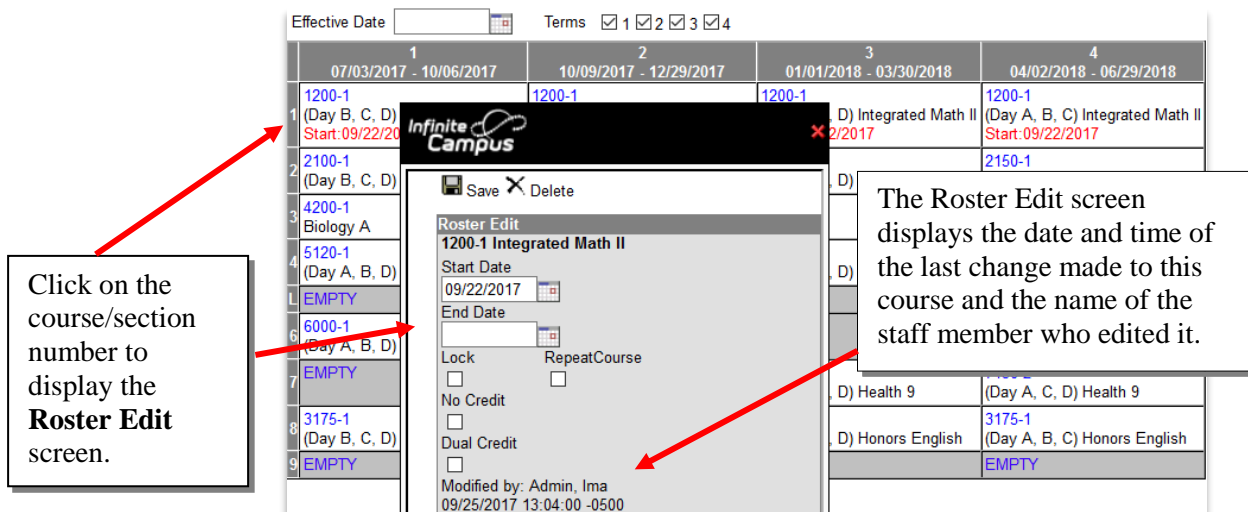
When adding a schedule for a new student after the school year has begun, many districts choose to add a 'Start Date' to display the day the student started in the course for attendance and grades. The 'Load' function does not have an option (as the 'Search'

function does) of using a ‘Start Date’. Therefore, the start date must be manually entered. If no date (or the wrong date) has been entered, the student may display on Roster reports before he/she starts. This date should match the date of the enrollment start date.

### **Special Note:**

Although the Course Request feature will attempt to load all of the courses into the student’s schedule, the user might need to manually override the system to satisfy the student’s requests (i.e., a scheduling rule prevents the system from loading a course [for example ‘skinnying’ two courses together]). This will require ‘playing around’ to see where courses can be moved to fit them all into the schedule. The Walk-in Scheduler has several features that can be utilized. Refer to the next section for more information.

1. On the left side of the screen, click on the course/section number (displays as a blue link). The **Roster Edit** screen will display.



Click on the course/section number to display the **Roster Edit** screen.

The Roster Edit screen displays the date and time of the last change made to this course and the name of the staff member who edited it.

2. Enter the *Start Date* and click on the <Save> button. The start date will display in red under the course name.

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	1200-1 (Day B, C, D) Integrated Math II Start: 09/22/2017	1200-1 (Day A, C, D) Integrated Math II Start: 09/22/2017	1200-1 (Day A, B, D) Integrated Math II Start: 09/22/2017	1200-1 (Day A, B, C) Integrated Math II Start: 09/22/2017

3. Repeat for all courses.

## THE WALK-IN SCHEDULER'S FEATURES

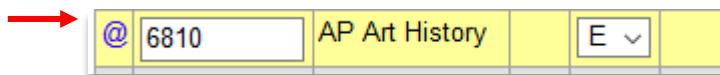
Although the Course Request Load feature will attempt to load all the courses into the student's schedule, the user may need to override the system manually to satisfy the student's requests. This will require 'playing around' to see where courses can be moved to fit them all into the schedule. There are several features that can be utilized.

**Note:** If the unscheduled courses does not 'fit' easily into the schedule, try 'unloading' (see page 18) and 'loading' the schedule again. The courses might schedule into different periods that will be easier to work with.

### *Search the Master Schedule*

This feature is used to search the master schedule for all sections of the course needed.

1. Click on the @ to the left of the course needed and the system will display on the schedule the periods where the course is offered.



- The course request will highlight in yellow.
- Hovering over any section on the schedule will display the teacher's name, room number and number of IEP students currently rostered.

The sections are color coded and display with the section number and number of students currently rostered (if nothing shows, there are no sections). If the section does not meet every day of a rotating schedule, the 'day(s)' will display as well:

- **Yellow** – this will display in the period that is currently scheduled for the course. If a user is searching for a course that is not scheduled (i.e., AP Music Theory), no yellow periods will display.
  - **Green** – this will display in any period that the course is offered in sections that do not have the maximum number of students.
  - **Pink** – this will display in any period that the course is offered in sections that have the maximum number of students (full or overbooked sections).
2. If the course/section displays in Green in the Empty period, click on the Section desired and the course/section will be scheduled. A user can also click on the Section desired if the course displays in Pink in the Empty period. A warning message that the course is full will appear. Click on the <OK> button to override the warning and overbook the class. **Note:** *Only users with appropriate User Rights will be able to overbook the section.*



**Example 1 – Looking for a non-rostered course:** Click on the @ for the AP Music Theory course:

Load Unload End Restore Search

Effective Date:  Terms: ☒ 1 ☒ 2 ☒ 3 ☒ 4

To add a new course section, replace an existing course section or drop an existing/add a new course section, select the appropriate option from the Manual Mode dropdown  
Manual Mode:  Add

Green cell - seats available  
Red cell - no seats available  
Red cell - student has a student constraint in the section  
Yellow cell - currently scheduled section

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II Sect:1 (1/25) Day:A,C,D	1200-1 (Day A, C, D) Integrated Math II Sect:1 (1/25) Day:A,B,D	1200-1 (Day A, B, D) Integrated Math II Sect:1 (1/25) Day:A,B,C	1200-1 (Day A, B, C) Integrated Math II Sect:1 (1/25) Day:B,C,D
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
5120-1 (Day A, B, D) Spanish II	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II
EMPTY	EMPTY	EMPTY	EMPTY
6000-1 (Day A, B, D) 2D Foundations A	6000-1 (Day A, B, C) 2D Foundations A	EMPTY	EMPTY
EMPTY	EMPTY	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English
EMPTY	EMPTY	EMPTY	EMPTY

Save Reqs Clear Reqs Get Sched Reqs

Requested Units: (92/144)

@	Course #	Course Name	Sn#	Type	Lock
	1200	Integrated Math II	1	R	
@	2100	Geography A	1	R	
@	2150	Geography B	1	R	
@	3175	Honors English	1	R	
@	4200	Biology A	1	R	
@	4250	Biology B	1	R	
@	5120	Spanish II	1	R	
@	6810	AP Art History	1	E	
@	6820	AP Music Theory	1	A	
@	7100	Physical Education 9	1	R	
@	7150	Health 9	2	R	
@	6000	2D Foundations A	1	E	

*Note that not all sections meet every day*

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II Sect:1 (1/25) Day:A,C,D	1200-1 (Day A, C, D) Integrated Math II Sect:1 (1/25) Day:A,B,D	1200-1 (Day A, B, D) Integrated Math II Sect:1 (1/25) Day:A,B,C	1200-1 (Day A, B, C) Integrated Math II Sect:1 (1/25) Day:B,C,D
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
5120-1 (Day A, B, D) Spanish II	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II

**Example 2 – Locating other options for a rostered course (to see if it can be moved):**  
Click on the @ for the course to see if it can be moved:

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II
	EMPTY	EMPTY	EMPTY
	6000-1 (Day A, B, C) 2D Foundations A	EMPTY	EMPTY
	EMPTY	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English
EMPTY Sect:2 (0/25) Day:A,C,D	EMPTY Sect:2 (0/25) Day:A,B,D	EMPTY Sect:2 (0/25) Day:A,B,C	EMPTY Sect:2 (0/25) Day:B,C,D

The requested course is also being offered in Period 09 and it is not full (green).

The requested course is currently scheduled in Period 08 (yellow).



## Search the Period

This is used to search a student's empty period for all courses. This is generally used when trying to fill that spot with an elective. Use this feature to search for all courses offered in the period needed.

1. Click on the <EMPTY> button in any of the Terms. If working with a ½ year course, click on the <EMPTY> button in the Term needed (i.e., for a Fall course, click on Term 1 or 2).

Click on the <EMPTY> link.

The requested Term and Period will display.

The courses matching the request will display.

Section Search

Start Date: 09/25/2017

Course Number:

Course Name:

Department:

Teacher:

Term: 1

Period: 6

Schedule:

Search



2500 Psychology  
2500-1 (2/30) T:1-2 P:6 IEPs: 0  
2630 Non-Western Cultures  
2630-2 (1/25) T:1-2 P:6 IEPs: 0  
2660 Contemporary World Issues  
2660-1 (24/25) Clement, Donald T:1-2 P:6 IEPs: 0  
3200 English 10  
3200-2 (30/30) Habenev, Jeta T:1-2 P:6 IEPs: 0  
6000 2D Foundations A  
6000-1 (3/30) T:1-2 P:6 IEPs: 0  
7650 Personal Fitness I  
7650-2 (4/30) T:1-2 P:6 IEPs: 0






2. The system will change the box on the right to display the **Search** feature. It will display the search criteria based on the Term and Period chosen. Additional information can be added (i.e., Department = Fine Arts). The courses display with all pertinent information:
  - a. Start Date (i.e. 09/25/2017).
  - b. Course number and section number (i.e., 7650-2).
  - c. Students in roster/maximum number of students (i.e., 15/30). Any sections that are full or overbooked will display in red.
  - d. Teacher name – last name, first name (i.e., Clement, Donald).
  - e. Terms – the terms that the section meets (i.e., T:1-4 is a section that meets all year; T:1-2 is a section that meets in the Fall only). It will only display courses that meet in the term chosen.
  - f. Period – the period that the section meets displays (i.e., P:5, P:6). It will only display courses that meet in the period chosen.
  - g. Schedules – if applicable, the schedule will display (i.e., S:A is a section that meets on A days, S:B is a section that meets on B days). If the school has more than 2 rotating days, the first day the section meets and the last day the section meets will display (i.e., S:A-C is a



section that meets on A and C or A, B and C). If the section is taught on all days, no schedule will display.

- h. IEPs – if the district is using Campus’ Special Education program, the number of students in the section roster with IEPs will display (i.e., *IEPs: 1*).
3. To choose a course to add to the student’s schedule, click on the course/section. It will display on the left, in the student’s schedule with the *Start Date*. As soon as the course displays in the student’s schedule, the student is rostered and will appear in the teacher’s class (the student will not display on the Attendance form until the enrollment Start Date).

Table - Group by Course (All Terms) ▾
 Display Active and Dropped Courses
 Print OR
Choose a report option ▾

 Load
 Unload
 End
 Restore
 Student Requests

Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

Click on the course/section. The course/section chosen will display on the schedule.

	1 06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B	4250-1 Biology B
Spanish II	5120-1 (Day A, B, D) Spanish II	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II
EMPTY	EMPTY	EMPTY	EMPTY	EMPTY
Personal Fitness I	7650-2 (Day A, B, C) Personal Fitness I <i>Start: 09/25/2017</i>	7650-2 (Day B, C, D) Personal Fitness I <i>Start: 09/25/2017</i>	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
AP Music Theory	6820-2 (Day B, C, D) AP Music Theory	6820-2 (Day A, C, D) AP Music Theory	6820-2 (Day A, B, D) AP Music Theory	6820-2 (Day A, B, C) AP Music Theory
AP Art History	6810-1 (Day A, C, D) AP Art History	6810-1 (Day A, B, D) AP Art History	6810-1 (Day A, B, C) AP Art History	6810-1 (Day B, C, D) AP Art History
Honors English	3175-2 (Day A, C, D) Honors English	3175-2 (Day A, B, D) Honors English	3175-2 (Day A, B, C) Honors English	3175-2 (Day B, C, D) Honors English



**When using the Search feature of the Walk-in Scheduler to create a student’s schedule, the user can override all the ‘scheduling rules’.**

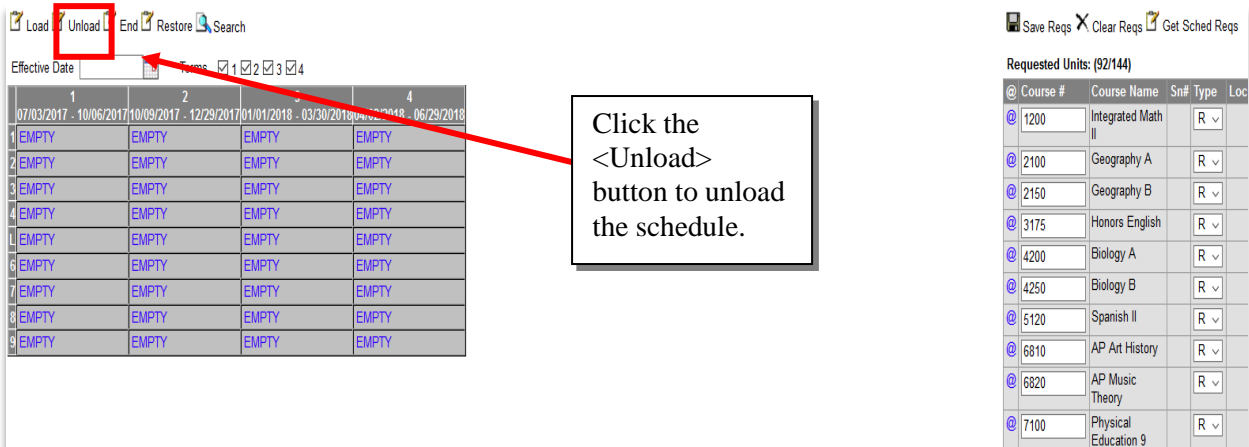
**Courses will display in red (instead of blue) in the schedule when they are completely full (or overbooked). Only users with the appropriate User Rights will be able to add students to red sections.**

## Unload the Schedule

This feature is used to unload the schedule in order to reload it with modified requests. The Unload feature will effectively delete all courses in the student's schedule; therefore it should only be used when working with an initial schedule, **never** when changing a student's schedule after he/she has attended classes. To change a student's schedule after school starts, refer to the 'Change a Student's Schedule' section, on page **Error!**

**Bookmark not defined.4.**

1. With the Walk-in Scheduler displayed, click on the <Unload> button.
2. A message will display to warn that the schedule will be unloaded. Press <ENTER> or click on the <OK> button to accept the message.
3. The system will unload all courses from the schedule (unless they were locked – see next section).
4. The schedule can be reloaded (if needed).



Click the <Unload> button to unload the schedule.

Effective Date	1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/06/2018 - 06/29/2018	
1	EMPTY	EMPTY	EMPTY	EMPTY
2	EMPTY	EMPTY	EMPTY	EMPTY
3	EMPTY	EMPTY	EMPTY	EMPTY
4	EMPTY	EMPTY	EMPTY	EMPTY
5	EMPTY	EMPTY	EMPTY	EMPTY
6	EMPTY	EMPTY	EMPTY	EMPTY
7	EMPTY	EMPTY	EMPTY	EMPTY
8	EMPTY	EMPTY	EMPTY	EMPTY
9	EMPTY	EMPTY	EMPTY	EMPTY

Course #	Course Name	Sn#	Type	Loc
1200	Integrated Math II		R	
2100	Geography A		R	
2150	Geography B		R	
3175	Honors English		R	
4200	Biology A		R	
4250	Biology B		R	
5120	Spanish II		R	
6810	AP Art History		R	
6820	AP Music Theory		R	
7100	Physical Education 9		R	

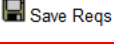


## Lock the Courses

This is used to lock a specific course/section after a schedule has been loaded so it does not unload when revising the schedule.

1. With the Walk-in Scheduler displayed, click on the *Lock* checkbox for all course/sections **not** to be unloaded.



**Unloading a student's schedule will remove them from the roster and their attendance data for that course therefore the unload feature should only be used on a student who has not attended the classes that are being unloaded.**






  

Requested Units: (92/144)

@	Course #	Course Name	Sn#	Type	Lock
@	1200	Integrated Math II	1	R	<input checked="" type="checkbox"/>
@	2100	Geography A	1	R	<input checked="" type="checkbox"/>
@	2150	Geography B	1	R	<input checked="" type="checkbox"/>
@	3175	Honors English	2	R	<input checked="" type="checkbox"/>
@	4200	Biology A	1	R	<input checked="" type="checkbox"/>
@	4250	Biology B	1	R	<input checked="" type="checkbox"/>
@	5120	Spanish II	1	E	<input type="checkbox"/>
@	6810	AP Art History	1	E	<input type="checkbox"/>
@	6820	AP Music Theory	2	A	<input type="checkbox"/>

Click the *Lock* checkboxes to lock the courses.




- Click on the <Save Reqs> button.
- Click on the <Unload> button.
- A message will display to warn that the schedule will be unloaded. Click on the <OK> button to accept the message.
- All the courses will unload except the ones previously locked.

Effective Date  Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
EMPTY	EMPTY	EMPTY	EMPTY
EMPTY	EMPTY	EMPTY	EMPTY
EMPTY	EMPTY	EMPTY	EMPTY
EMPTY	EMPTY	EMPTY	EMPTY
EMPTY	EMPTY	EMPTY	EMPTY
3175-2 (Day A, C, D) Honors English	3175-2 (Day A, B, D) Honors English	3175-2 (Day A, B, C) Honors English	3175-2 (Day B, C, D) Honors English

All courses will unload except the 'locked' courses.

Requested Units: (80/144)

@	Course #	Course Name	Sn#	Type	Lock
@	1200	Integrated Math II	1	R	<input checked="" type="checkbox"/>
@	2100	Geography A	1	R	<input checked="" type="checkbox"/>
@	2150	Geography B	1	R	<input checked="" type="checkbox"/>
@	3175	Honors English	2	R	<input checked="" type="checkbox"/>
@	4200	Biology A	1	R	<input checked="" type="checkbox"/>
@	4250	Biology B	1	R	<input checked="" type="checkbox"/>
@	7100	Physical Education 9		R	<input type="checkbox"/>
@	7150	Health 9		R	<input type="checkbox"/>
@	5120	Spanish II		E	<input type="checkbox"/>
@	6000	2D Foundations		E	<input type="checkbox"/>

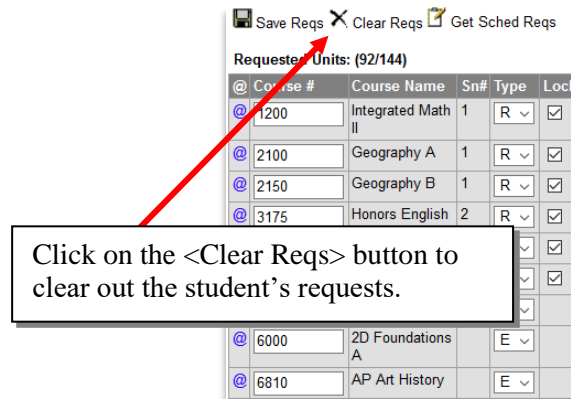
## Clear Requests

This is used to clear all the student's course requests. This should only be used when creating a schedule for a new student and there are so many changes it's easier to start from a blank schedule. It can also be used to clear the original requests and only show the requests that were actually scheduled (refer to next section).

- With the Walk-in Scheduler displayed, click on the <Clear Reqs> button.
- A message will display to warn that all the student's requests will be deleted. Click on the <OK> button to accept the message.
- All of the student's requests will be deleted, including locked ones. Note: If a student has locked courses on their schedule it will not delete them from the



schedule if the unload button is hit. The Roster editor must be opened (by clicking on the blue hyperlink on the schedule) and the lock button unchecked for sections to be unloaded.



## Get Scheduled Requests

After working with the student, the schedule on the left might not match the student's requests on the right. In order to create the Requests from the schedule, use the <Get Sched Req> button. In the example below, the student changed the class from 'Honors English' to 'English 9'.

**Example of a schedule before running the *Get Scheduled Requests* feature:**

Load Unload End Restore Search

Effective Date Terms 1 2 3 4

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A			
2300-1 (Day A, B, C) US History A Start: 09/26/2017			
EMPTY			
2660-1 (Day B, C, D) Contemporary World Issues Start: 09/26/2017	2660-1 (Day A, C, D) Contemporary World Issues Start: 09/26/2017	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
7100-1 (Day A, B, C) Physical Education 9 Start: 09/26/2017	7100-1 (Day B, C, D) Physical Education 9 Start: 09/26/2017	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
3100-1 (Day B, C, D) English 9 Start: 09/26/2017	3100-1 (Day A, C, D) English 9 Start: 09/26/2017	3150-1 (Day A, B, D) English 9 B	3150-1 (Day A, B, C) English 9 B

'English 9/English 9B' is on the schedule, but 'Honors English' is listed on the requests.

Save Reqs X Clear Reqs Get Sched Reqs

Requested Units: (80/144)

@ Course #	Course Name	Sn#	Type
1200	Integrated Math II	1	R
2100	Geography A	1	R
2150	Geography B	1	R
3175	Honors English	2	R
4200	Biology A	1	R
4250	Biology B	1	R
5120	Spanish II		R
7100	Physical Education 9	1	R
7150	Health 9	2	R
6000	2D Foundations A	2	E
6810	AP Art History		E
6820	AP Music Theory		A

- With the Walk-in Scheduler displayed, click on the <Get Sched Reqs> button.
- A message will display to warn that the student's requests will be built from the schedule. Press <ENTER> or click on the <OK> button to accept the message.

Load Unload End Restore Search

Effective Date:  Terms: ☒ 1 ☒ 2 ☒ 3 ☒ 4

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II Start: 09/26/2017	1200-1 (Day A, C, D) Integrated Math II Start: 09/26/2017	1200-1 (Day A, B, D) Integrated Math II Start: 09/26/2017	1200-1 (Day A, B, C) Integrated Math II Start: 09/26/2017
2100-1 (Day B, C, D) Geography A Start: 09/26/2017	2100-1 (Day A, C, D) Geography A Start: 09/26/2017	2150-1 (Day A, B, D) Geography A Start: 09/26/2017	2150-1 (Day A, B, C) Geography A Start: 09/26/2017
4200-1 Biology A Start: 09/26/2017	4200-1 Biology A Start: 09/26/2017	4250-1 Biology B Start: 09/26/2017	
5110-1 (Day A, B, D) Spanish I Start: 09/26/2017	5110-1 (Day A, B, C) Spanish I Start: 09/26/2017	5110-1 (Day B, C, D) Spanish I Start: 09/26/2017	5110-1 (Day A, C, D) Spanish I Start: 09/26/2017
EMPTY	EMPTY	EMPTY	EMPTY
2500-1 (Day A, B, C) Psychology Start: 09/26/2017	2500-1 (Day B, C, D) Psychology Start: 09/26/2017	6000-2 (Day A, B, C) 2D Foundations A Start: 09/26/2017	6000-2 (Day B, C, D) 2D Foundations A Start: 09/26/2017
7100-1 (Day A, B, C) Physical Education 9 Start: 09/26/2017	7100-1 (Day B, C, D) Physical Education 9 Start: 09/26/2017	7150-2 (Day B, C, D) Health 9 Start: 09/26/2017	7150-2 (Day A, C, D) Health 9 Start: 09/26/2017
3100-1 (Day B, C, D) English 9 Start: 09/26/2017	3100-1 (Day A, C, D) English 9 Start: 09/26/2017	3150-1 (Day A, B, D) English 9 B Start: 09/26/2017	3150-1 (Day A, B, C) English 9 B Start: 09/26/2017
6810-2 (Day B, C, D) AP Art History Start: 09/26/2017	6810-2 (Day A, C, D) AP Art History Start: 09/26/2017	6810-2 (Day A, B, D) AP Art History Start: 09/26/2017	6810-2 (Day A, B, C) AP Art History Start: 09/26/2017

Save Reqs Clear Reqs Get Sched Reqs

Requested Units: (110/144)

Course #	Course Name	Sn#	Type	Lo
1200	Integrated Math II	1	R	
2100	Geography A	1	R	
2150	Geography B	1	R	
	Honors English		R	
	Biology A	1	R	
	Biology B	1	R	
	Spanish I	1	R	
6000	2D Foundations A	2	R	
6810	AP Art History	2	R	
6820	AP Music Theory		R	
7100	Physical Education 9	1	R	
7150	Health 9	2	R	
2500	Psychology	1	E	
3100	English 9	1	E	
3150	English 9 B	1	E	

‘English 9/English 9B is now on both sides: the schedule and the requests.’

6. Click on the <Save Reqs> button.

7. All new requests will display with the *Type* of ‘E’ (for elective).



### Special Note:

The courses that were **not** on the schedule will still display on the *Requests* section of the Walk-in Scheduler (i.e., ‘Honors English’ in the prior example). To sync both sides perfectly, run the <Clear Requests> function first, then run the <Get Scheduled Requests> function. All requests will display with the ‘Type’ of ‘E’ (for elective).

## CHANGE A STUDENT'S SCHEDULE

### *Change a Schedule Using the 'Drop & Add' Feature*

This feature is to be used when changing a schedule and allowing the system to enter both the drop (end) date and the start date. It works best for courses that are held every day.

1. Choose the *Year* and *School* calendar for the current school year.

Year  School

2. Navigate to *Student Information > General*.
3. Use the Search feature to find the desired student.
4. Click on the Schedule tab.
5. Click on the <Walk-in Scheduler> button. The screen will display the student's schedule on the left and the course requests on the right.

#### Student's original schedule:

Load Unload End Restore Search

Effective Date  Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
5110-1 (Day A, B, D) Spanish I	5110-1 (Day A, B, C) Spanish I	5110-1 (Day B, C, D) Spanish I	5110-1 (Day A, C, D) Spanish I
EMPTY	EMPTY	EMPTY	EMPTY
7650-2 (Day A, B, C) Personal Fitness I	7650-2 (Day B, C, D) Personal Fitness I	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
7100-1 (Day A, B, C) Physical Education 9	7100-1 (Day B, C, D) Physical Education 9	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9

Save Reqs X Clear Reqs

Requested Units: (58/144)

@	Course #	Course Name
@	1200	Integrated Math II
@	2100	Geography A
@	2150	Geography B
@	3175	Honors English
@	4200	Biology A
@	4250	Biology B
@	5110	Spanish I
@	6000	2D Foundations A
	6810	

Type the new course number in a blank field.

6. If the student is changing courses, type the course number in a blank *Course #* field in the section on the right. Click the <Save Reqs> button. If the student is just changing sections of the same course skip to the next step.
7. Click on the @ to the left of the course to be added. This might be the same course where the student is just changing sections.



Save Reqs Clear Reqs Get Sched Reqs

Requested Units: (70/144)

@	Course #	Course Name	Sn#	Type	Lock
@	1300	Integrated Math III	1	R v	<input type="checkbox"/>
@	2100	Geography A	1	R v	<input type="checkbox"/>
@	2150	Geography B	1	R v	<input type="checkbox"/>
@	3175	Honors English	1	R v	<input type="checkbox"/>
@	4200	Biology A	1	R v	<input type="checkbox"/>
@	4250	Biology B	1	R v	<input type="checkbox"/>
@	5120	Spanish II	1	R v	<input type="checkbox"/>
@	6810	AP Art History		R v	<input type="checkbox"/>
@	7150	Health 9	2	R v	<input type="checkbox"/>

Click on the @ to the left of the course to be added.

8. Type the 'Start' date for the new course (or section) in the *Effective Date* field.
9. Choose 'Drop & Add' from the drop down list in the *Manual Mode* field.
10. Select in which *Terms* the course should appear on the schedule.
11. On the left side, in the student's schedule, click on the course/section to be added. All sections will display with their current roster. In order to view other information (teacher, room, IEPs), hover over the field.
  - Choose a course/section in green to place the student in a class with a non-filled roster.
  - Choose a course/section in pink to place the student in a class with a filled roster. Only users with appropriate User Rights will be able to overload a section.





Load Unload End Restore Search

Effective Date: 09/26/2017 Terms: ☒ 1 ☒ 2 ☒ 3 ☒ 4

Manual Mode: Drop & Add

To add a new course section, replace an existing course section or drop an existing/add a new course section, use the following color coding:  
 Green cell - seats available  
 Red cell - no seats available  
 Red cell - student has a student constraint in the section  
 Yellow cell - currently scheduled section

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography B	2100-1 (Day A, B, C) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4200-1 Biology B	4250-1 Biology B
5110-1 (Day A, B, D) Spanish I	5110-1 (Day A, B, C) Spanish I	5110-1 (Day B, C, D) Spanish I	5110-1 (Day A, C, D) Spanish I
EMPTY	EMPTY	EMPTY	EMPTY
7650-2 (Day A, B, C) Personal Fitness I	7650-2 (Day B, C, D) Personal Fitness I	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
7100-1 (Day A, B, C) Physical Education 9	7100-1 (Day B, C, D) Physical Education 9	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
3175-1 (Day B, C, D) Honors English Sect:1 (3/25) Day:A,C,D	3175-1 (Day A, C, D) Honors English Sect:1 (3/25) Day:A,C,D	3175-1 (Day A, B, D) Honors English Sect:1 (3/25) Day:A,B,C	3175-1 (Day A, B, C) Honors English Sect:1 (3/25) Day:B,C,D
8720-1 (Day A, C, D) Java Programming Sect:2 (1/25) Day:B,C,D	8720-1 (Day A, B, D) Java Programming Sect:2 (1/25) Day:A,C,D	8720-1 (Day A, B, D) Game Design Sect:2 (1/25) Day:A,B,D	8730-1 (Day A, B, C) Game Design Sect:2 (1/25) Day:A,B,C

Type the date the student will start the new class.  
 Select the Terms.  
 Choose Drop & Add.

Click on the section to be added.

12. A message will display to warn that the course will be added with the 'Effective' date and the existing section will be dropped using the prior day. Press <ENTER> or click on the <OK> button to accept the message.

Add course at term (1) - period (9) starting 9/26/2017. Existing sections will be dropped as of 9/25/2017

OK Cancel



### Special Note:

'Drop & Add' mode should be used with caution. If a schedule has multiple rotations and two or more courses scheduled into the same period, the 'Drop & Add' mode will drop ALL of the courses scheduled in the period and add only the one selected. It is best to use it for courses that are held daily. To avoid this, see the section on manually dropping and adding courses on p. 28.



### Student's revised schedule:

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2	2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
3	4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
4	5110-1 (Day A, B, D) Spanish I	5110-1 (Day A, B, C) Spanish I	5110-1 (Day B, C, D) Spanish I	5110-1 (Day A, C, D) Spanish I
5	EMPTY	EMPTY	EMPTY	EMPTY
6	7650-2 (Day A, B, C) Personal Fitness I	7650-2 (Day B, C, D) Personal Fitness I	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
7	7100-1 (Day A, B, C) Physical Education 9	7100-1 (Day B, C, D) Physical Education 9	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
8	3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English
9	6810-2 (Day B, C, D) AP Art History Start:09/26/2017	6810-2 (Day A, C, D) AP Art History Start:09/26/2017	6810-2 (Day A, B, D) AP Art History Start:09/26/2017	6810-2 (Day A, B, C) AP Art History Start:09/26/2017
	8720-1 (Day A, C, D) Java Programming Drop:09/25/2017	8720-1 (Day A, B, D) Java Programming Drop:09/25/2017	8730-1 (Day A, B, D) Game Design Drop:09/26/2017	8730-1 (Day A, B, C) Game Design Drop:09/26/2017

13. Whenever the schedule is changed, it should be printed and distributed to the student. For instructions, refer to *Print the Student's Schedule* on page 91. The user has the option of viewing/printing all of the courses or just the Active courses.



### Special Note:

In addition to the 'Drop & Add' mode, there are two other modes that can be used. They should only be used when the user has a complete understanding of the functionality.

**Add Mode** – this will add the course/section to the period chosen using the *Effective Date*.

**Possible Issue:** If a course is already in that section, the student will have two courses in the same period.

**Replace Mode** – this will *delete* the current course/section from the period and add the new course/section to the period using the *Effective Date*.

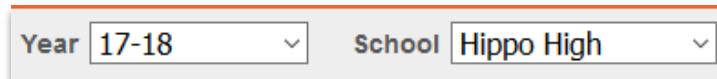
**Possible Issue:** Courses are rarely deleted, so this option is often used by mistake. The system does **not** display a warning about lost grades and attendance.

## ***Change a Schedule by Entering the ‘Drop’ and ‘Add’ Dates Manually (or Deleting the Old Course)***

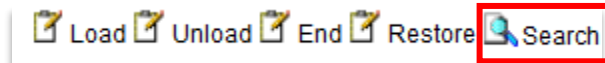
This feature is to be used when changing a schedule and entering the dates manually.

This method can be used when it is appropriate to delete a course/section instead of dropping it. Courses should only be deleted when there are no attendance or grade records for the student in the class.

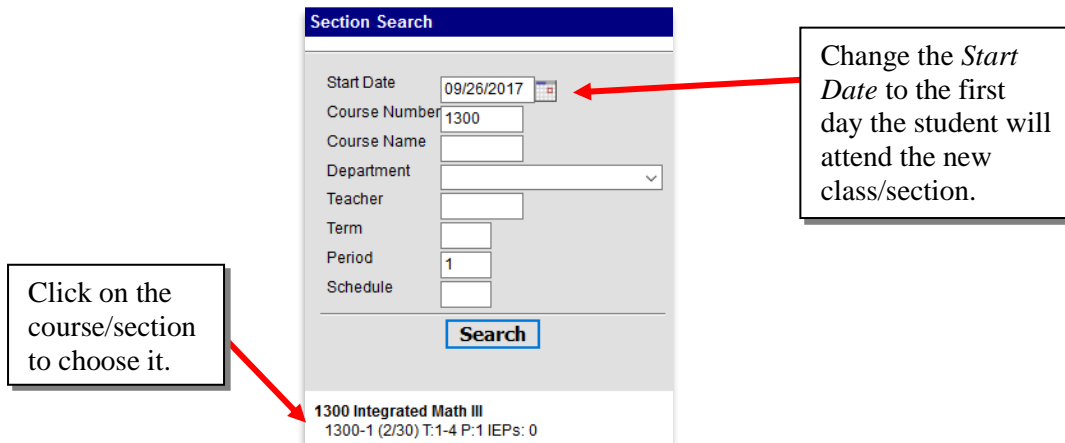
1. Choose the *Year* and *School* calendar for the current school year.



2. Navigate to *Student Information > General*.
3. Use the Search feature to find the desired student.
4. Click on the Schedule tab.
5. Click on the <Walk-in Scheduler> button. The screen will display the student’s schedule on the left and the course requests on the right.
6. To add a class to the period, click on the <Search> button.



7. Enter the search criteria. The user can search using any of the fields listed. Usually when replacing a course, it is best to enter the Course Number and the Period.
8. Click on the <Search> button in the **Section Search** box. The system will display all of the courses that match the criteria. The courses display with all pertinent information.



Click on the course/section to choose it.

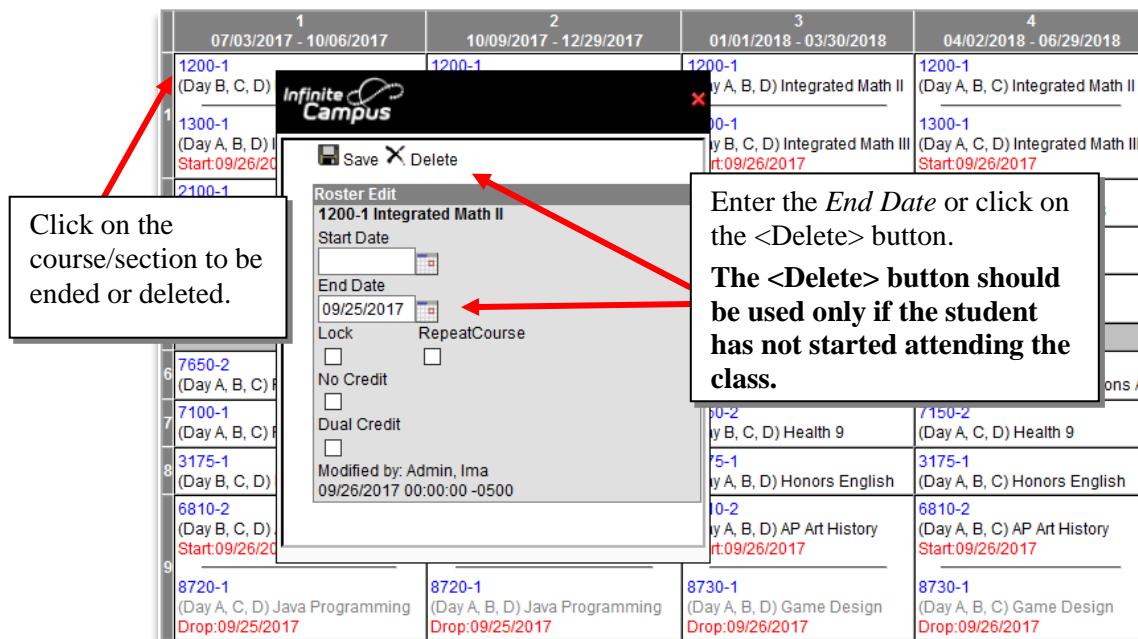
Change the *Start Date* to the first day the student will attend the new class/section.

9. Change the *Start Date* to the date the student will start their new course/section.

10. To choose a course to add to the student's schedule, click on the course/section. It will display on the left, in the student's schedule. As soon as the course displays in the student's schedule, the student is rostered and will appear in the teacher's class (the student will not display on the Attendance form until the enrollment Start Date).

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	1200-1 (Day B, C, D) Integrated Math II	1200-1 (Day A, C, D) Integrated Math II	1200-1 (Day A, B, D) Integrated Math II	1200-1 (Day A, B, C) Integrated Math II
2	1300-1 (Day A, B, D) Integrated Math III Start:09/26/2017	1300-1 (Day A, B, C) Integrated Math III Start:09/26/2017	1300-1 (Day B, C, D) Integrated Math III Start:09/26/2017	1300-1 (Day A, C, D) Integrated Math III Start:09/26/2017
3	2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4	4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
5	5110-1 (Day A, B, D) Spanish I	5110-1 (Day A, B, C) Spanish I	5110-1 (Day B, C, D) Spanish I	5110-1 (Day A, C, D) Spanish I
6	EMPTY	EMPTY	EMPTY	EMPTY
7	7650-2 (Day A, B, C) Personal Fitness I	7650-2 (Day B, C, D) Personal Fitness I	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
8	7100-1 (Day A, B, C) Physical Education 9	7100-1 (Day B, C, D) Physical Education 9	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
9	3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English
10	6810-2 (Day B, C, D) AP Art History Start:09/26/2017	6810-2 (Day A, C, D) AP Art History Start:09/26/2017	6810-2 (Day A, B, D) AP Art History Start:09/26/2017	6810-2 (Day A, B, C) AP Art History Start:09/26/2017

11. On the left side of the screen, click on the course/section number to be ended/deleted. The Roster Edit screen will display.



Click on the course/section to be ended or deleted.

Enter the *End Date* or click on the <Delete> button.  
**The <Delete> button should be used only if the student has not started attending the class.**



12. Enter the *End Date* (the last day the student will be in class) and click on the <Save> button. The end (Drop) date will display under the course name. **If the student hasn't attended the class yet (or has only attended for a few days with no attendance events), press the <Delete> key instead to delete the class.**

1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, C, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, B, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, B, C) Integrated Math II Drop:09/25/2017
1300-1 (Day A, B, D) Integrated Math III Start:09/26/2017	1300-1 (Day A, B, C) Integrated Math III Start:09/26/2017	1300-1 (Day B, C, D) Integrated Math III Start:09/26/2017	1300-1 (Day A, C, D) Integrated Math III Start:09/26/2017
2100-1 (Day B, C, D) Geography A	2100-1 (Day A, C, D) Geography A	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
4200-1 Biology A	4200-1 Biology A	4250-1 Biology B	4250-1 Biology B
5110-1 (Day A, B, D) Spanish I	5110-1 (Day A, B, C) Spanish I	5110-1 (Day B, C, D) Spanish I	5110-1 (Day A, C, D) Spanish I
EMPTY	EMPTY	EMPTY	EMPTY
7650-2 (Day A, B, C) Personal Fitness I	7650-2 (Day B, C, D) Personal Fitness I	6000-2 (Day A, B, C) 2D Foundations A	6000-2 (Day B, C, D) 2D Foundations A
7100-1 (Day A, B, C) Physical Education 9	7100-1 (Day B, C, D) Physical Education 9	7150-2 (Day B, C, D) Health 9	7150-2 (Day A, C, D) Health 9
3175-1 (Day B, C, D) Honors English	3175-1 (Day A, C, D) Honors English	3175-1 (Day A, B, D) Honors English	3175-1 (Day A, B, C) Honors English

13. Repeat for all courses to be ended or deleted.



**When using the Search feature of the Walk-in Scheduler to create a student's schedule, the 'scheduling rules' do not apply.**

**Courses will display in red (instead of blue) in the schedule when they are completely full (or overbooked). Only users with the appropriate User Rights will be able to add students to red sections.**

14. Whenever the schedule is changed, it should be printed and distributed to the student. For instructions, refer *Print the Student's Schedule* starting on page 11. The user has the option of viewing/printing all the courses or just the Active courses.



## RESTORING A SCHEDULE

During the school year, many students change their schedules, either to take a different section of the same course, or to take a different course. There are 2 ways to change a student's schedule:

1. Use the 'Drop & Add' feature to input a date. The system will add the new course/section on the date and drop the previous course/section on the date before the date input (i.e., *Effective date* = 9/26/2017, *Drop date* = 9/25/2017, *Start Date* = 9/26/2017).
2. Use the 'Roster Edit' feature to add or drop individual courses. *End Date* the course/section to be dropped on the day before the *Start Date* of the new course to be added (i.e., *End Date* = 9/25/2017, *Start Date* = 9/26/2017). This can also be used when deleting a class (instead of 'dropping' it).



**When changing a student's schedule, the courses to be changed should NOT be deleted.**

**Deleting a course that the student has attended for a period of time will result in lost Attendance records and lost Grades.**

**A course can be deleted ONLY if a student has no attendance records or grades for the course.**

**Dropped courses should be End Dated and the new added courses should be Start Dated to preserve historical data.**

If a student leaves the school, the schedule will be ended automatically when the student's enrollment ends. If the student returns to the school within that school year, the school can restore the student's schedule using the Restore option. This option will place the student into his/her previously scheduled classes, even if they have since been filled and are now overloaded.

### ***Restoring a Student's Schedule***

To use the Restore option:

1. Navigate to *Student Information > General*.
2. Click on the **Schedule** tab.
3. Click on the <Walk-In Scheduler> button.
4. Enter the date that the student will begin in the *Effective Date* field.
5. Select the <Restore> button.



Load Unload End Restore Search

Effective Date **10/09/2017** Terms ☐ 1 ☒ 2 ☐ 3 ☐ 4

1	2	3	4
07/03/2017 - 10/06/2017	10/09/2017 - 12/29/2017	01/01/2018 - 03/30/2018	04/02/2018 - 06/29/2018
1200-1 (Day B, C, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, C, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, B, D) Integrated Math II Drop:09/25/2017	1200-1 (Day A, B, C) Integrated Math II Drop:09/25/2017
1300-1 (Day A, B, D) Integrated Math III (09/26/2017-10/02/2017)	1300-1 (Day A, B, C) Integrated Math III (09/26/2017-10/02/2017)	1300-1 (Day B, C, D) Integrated Math III (09/26/2017-10/02/2017)	1300-1 (Day A, C, D) Integrated Math III (09/26/2017-10/02/2017)
2100-1 (Day B, C, D) Geography A Drop:10/02/2017	2100-1 (Day A, C, D) Geography A Drop:10/02/2017	2150-1 (Day A, B, D) Geography B Drop:10/02/2017	2150-1 (Day A, B, C) Geography B Drop:10/02/2017
4200-1 Biology A Drop:10/02/2017	4200-1 Biology A Drop:10/02/2017	4250-1 Biology B Drop:10/02/2017	4250-1 Biology B Drop:10/02/2017
5110-1 (Day A, B, D) Spanish I Drop:10/02/2017	5110-1 (Day A, B, C) Spanish I Drop:10/02/2017	5110-1 (Day B, C, D) Spanish I Drop:10/02/2017	5110-1 (Day A, C, D) Spanish I Drop:10/02/2017
EMPTY	EMPTY	EMPTY	EMPTY
7650-2 (Day A, B, C) Personal Fitness I Drop:10/02/2017	7650-2 (Day B, C, D) Personal Fitness I Drop:10/02/2017	6000-2 (Day A, B, C) 2D Foundations A Drop:10/02/2017	6000-2 (Day B, C, D) 2D Foundations A Drop:10/02/2017
7100-1 (Day A, B, C) Physical Education 9 Drop:10/02/2017	7100-1 (Day B, C, D) Physical Education 9 Drop:10/02/2017	7150-2 (Day B, C, D) Health 9 Drop:10/02/2017	7150-2 (Day A, C, D) Health 9 Drop:10/02/2017
3175-1 (Day B, C, D) Honors English Drop:10/02/2017	3175-1 (Day A, C, D) Honors English Drop:10/02/2017	3175-1 (Day A, B, D) Honors English Drop:10/02/2017	3175-1 (Day A, B, C) Honors English Drop:10/02/2017
6810-2 (Day B, C, D) AP Art History (09/26/2017-10/02/2017)	6810-2 (Day A, C, D) AP Art History (09/26/2017-10/02/2017)	6810-2 (Day A, B, D) AP Art History (09/26/2017-10/02/2017)	6810-2 (Day A, B, C) AP Art History (09/26/2017-10/02/2017)
8720-1 (Day A, C, D) Java Programming Drop:09/25/2017	8720-1 (Day A, B, D) Java Programming Drop:09/25/2017	8730-1 (Day A, B, D) Game Design Drop:09/26/2017	8730-1 (Day A, B, C) Game Design Drop:09/26/2017

6. A pop-up message will appear warning the use that all dropped and future sessions will be recreated and that classes may be overloaded.

The student's schedule will be restored. All dropped and future sections will be recreated as of 10/09/2017. If these classes exceed capacity, they will be overloaded. Previous constraints for students in the same section will also be restored. Do you want to continue?

OK Cancel

7. Select <OK> to continue. There is no further save button. The previous schedule will be restored. Start and drop dates for courses will appear in red.





	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1	1100-1 (Day A, B, C) Integrated Math I (09/11/2017-09/29/2017) 1100-1 Start:10/09/2017	1100-1 (Day B, C, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)	1100-1 (Day A, C, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)	1100-1 (Day A, B, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)
2	2100-1 (Day B, C, D) Geography A (09/11/2017-09/29/2017) 2100-1 Start:10/09/2017	2100-1 (Day A, C, D) Geography A Start:10/09/2017 2100-1 (09/11/2017-09/29/2017)	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B
3	4100-1 (Day A, B, C, D) Physical Science A (09/11/2017-09/29/2017) 4100-1 Start:10/09/2017	4100-1 (Day A, B, C, D) Physical Science A Start:10/09/2017 4100-1 (09/11/2017-09/29/2017)	4150-1 Physical Science B	4150-1 Physical Science B
4	5120-1 (Day A, B, D) Spanish II (09/11/2017-09/29/2017) 5120-1 Start:10/09/2017	5120-1 (Day A, B, C) Spanish II Start:10/09/2017 5120-1 (09/11/2017-09/29/2017)	5120-1 (Day B, C, D) Spanish II Start:10/09/2017 5120-1 (09/11/2017-09/29/2017)	5120-1 (Day A, C, D) Spanish II Start:10/09/2017 5120-1 (09/11/2017-09/29/2017)

8. Select the <View Schedule> button at the top right to view the new schedule.

Table - Group by Course (All Terms) ▼ Display Active and Dropped Courses Print OR Choose a report option ▼ View Schedule

Load Unload End Restore Search

*Example of new view of schedule.*

	Term 1 (07/03/17-10/06/17)	Term 2 (10/09/17-12/29/17)	Term 3 (01/01/18-03/30/18)	Term 4 (04/02/18-06/29/18)
1	1100-1 Integrated Math I (Day A, B, C) Haag, Hakim Start: 09/11/2017 Drop: 09/29/2017	1100-1 Integrated Math I (Day B, C, D) Haag, Hakim	1100-1 Integrated Math I (Day A, C, D) Haag, Hakim	1100-1 Integrated Math I (Day A, B, D) Haag, Hakim
2	2100-1 Geography A (Day B, C, D) Haag, Hakim Rm: 30 Start: 09/11/2017 Drop: 09/29/2017	2100-1 Geography A (Day A, C, D) Haag, Hakim Rm: 30	2150-1 Geography B (Day A, B, D) Haag, Hakim Rm: 30	2150-1 Geography B (Day A, B, C) Haag, Hakim Rm: 30
3	4100-1 Physical Science A Haag, Hakim Start: 09/11/2017 Drop: 09/29/2017	4100-1 Physical Science A Haag, Hakim	4150-1 Physical Science B Haag, Hakim	4150-1 Physical Science B Haag, Hakim
4	5120-1 Spanish II (Day A, B, D) Start: 09/11/2017 Drop: 09/29/2017	5120-1 Spanish II (Day A, B, C)	5120-1 Spanish II (Day B, C, D)	5120-1 Spanish II (Day A, C, D)

9. Notice that Term 1 is grayed out on the schedule view because Term 1 has already concluded. Previous Start and Drop dates are also visible in red.

10. Print the schedule for the student if needed. In this example, Term 1 is grayed out as the term has already concluded. For more information on printing out student schedules, see p. 91 - **Print the Student's Schedule** as schedule views can vary.



Example of a student's restored schedule

<b>17-18</b> <b>Hippo High</b> 10 Wheatleigh Avenue, St. James NY 11780 Generated on 10/11/2017 09:13:06 AM Page 1 of 1		<b>Student Schedule For Blackledge, John</b> Grade: 09 Student Number: 1817170004 Term(s): All Courses enrolled: 13 Mailing Address: 102 Rustic Drive , St. James, NY 11780		
	Term 1 (07/03/17- 10/06/17)	Term 2 (10/09/17- 12/29/17)	Term 3 (01/01/18- 03/30/18)	Term 4 (04/02/18- 06/29/18)
1	1100-1 (Day A, B, C) Integrated Math I Haag, Hakim Start: 09/11/2017 Drop: 09/29/2017	1100-1 (Day B, C, D) Integrated Math I Haag, Hakim	1100-1 (Day A, C, D) Integrated Math I Haag, Hakim	1100-1 (Day A, B, D) Integrated Math I Haag, Hakim
2	2100-1 (Day B, C, D) Geography A Haag, Hakim Rm: 30 Start: 09/11/2017 Drop: 09/29/2017	2100-1 (Day A, C, D) Geography A Haag, Hakim Rm: 30	2150-1 (Day A, B, D) Geography B Haag, Hakim Rm: 30	2150-1 (Day A, B, C) Geography B Haag, Hakim Rm: 30
3	4100-1 Physical Science A Haag, Hakim Start: 09/11/2017 Drop: 09/29/2017	4100-1 Physical Science A Haag, Hakim	4150-1 Physical Science B Haag, Hakim	4150-1 Physical Science B Haag, Hakim
4	5120-1 (Day A, B, D) Spanish II Start: 09/11/2017 Drop: 09/29/2017	5120-1 (Day A, B, C) Spanish II	5120-1 (Day B, C, D) Spanish II	5120-1 (Day A, C, D) Spanish II
L	EMPTY	EMPTY	EMPTY	EMPTY
6	7650-2 (Day A, B, C) Personal Fitness I Start: 09/11/2017 Drop: 09/29/2017	7650-2 (Day B, C, D) Personal Fitness I	7650-1 (Day A, C, D) Personal Fitness I	7650-1 (Day A, B, D) Personal Fitness I
7	7150-1 (Day A, B, D) Health 9 Start: 09/11/2017 Drop: 09/29/2017	7150-1 (Day A, B, C) Health 9	8710-2 (Day A, B, D) C++ Programming	8710-2 (Day A, B, C) C++ Programming
8	3100-1 (Day B, C, D) English 9 Harding, Jocasta Rm: 20 Start: 09/11/2017 Drop: 09/29/2017	3100-1 (Day A, C, D) English 9 Harding, Jocasta Rm: 20	3150-1 (Day A, B, D) English 9 B Harding, Jocasta	3150-1 (Day A, B, C) English 9 B Harding, Jocasta
9	8740-1 (Day A, B, C) Audio Engineering Start: 09/11/2017 Drop: 09/29/2017	8740-1 (Day B, C, D) Audio Engineering	8750-1 (Day A, B, C) Computer Science	8750-1 (Day B, C, D) Computer Science

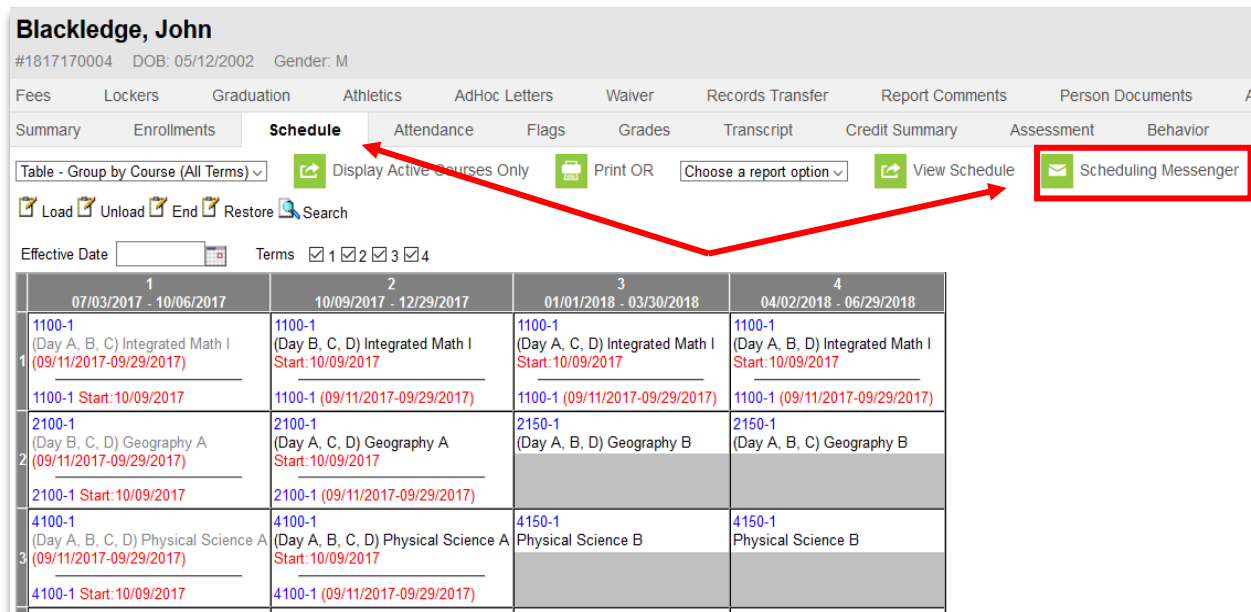


## THE SCHEDULING MESSENGER

The Scheduling Messenger allows users, usually counselors, to send messages to a student's affected teacher(s) to inform them that changes have been made to one of their course section rosters. This is tool rights based. Counselors must be given the proper tool rights to use the Scheduling Messenger.

### Using the Scheduling Messenger

1. Navigate to Student *Information* > *General*.
2. Click on the Schedule tab. Click on the <Scheduling Messenger> button.



**Blackledge, John**  
#1817170004 DOB: 05/12/2002 Gender: M

Fees Lockers Graduation Athletics AdHoc Letters Waiver Records Transfer Report Comments Person Documents

Summary Enrollments **Schedule** Attendance Flags Grades Transcript Credit Summary Assessment Behavior

Table - Group by Course (All Terms) Display Active Sources Only Print OR Choose a report option View Schedule Scheduling Messenger

Load Unload End Restore Search

Effective Date Terms ☒ 1 ☒ 2 ☒ 3 ☒ 4

	1 07/03/2017 - 10/06/2017	2 10/09/2017 - 12/29/2017	3 01/01/2018 - 03/30/2018	4 04/02/2018 - 06/29/2018
1100-1 (Day A, B, C) Integrated Math I (09/11/2017-09/29/2017) 1100-1 Start:10/09/2017	1100-1 (Day B, C, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)	1100-1 (Day A, C, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)	1100-1 (Day A, B, D) Integrated Math I Start:10/09/2017 1100-1 (09/11/2017-09/29/2017)	
2100-1 (Day B, C, D) Geography A (09/11/2017-09/29/2017) 2100-1 Start:10/09/2017	2100-1 (Day A, C, D) Geography A Start:10/09/2017 2100-1 (09/11/2017-09/29/2017)	2150-1 (Day A, B, D) Geography B	2150-1 (Day A, B, C) Geography B	
4100-1 (Day A, B, C, D) Physical Science A (09/11/2017-09/29/2017) 4100-1 Start:10/09/2017	4100-1 (Day A, B, C, D) Physical Science A Start:10/09/2017 4100-1 (09/11/2017-09/29/2017)	4150-1 Physical Science B	4150-1 Physical Science B	

3. Sections that were 'Modified Today' display in the *Recipient Selection* field by default, making it easier to notify teachers about roster changes.
4. Clicking on the <Select All> button will move all potential recipients to *Message Recipients*.
5. *Message Recipients* can be removed from the list by clicking on their names. Likewise, *Message Recipients* can be added individually by clicking on their names.
6. Teachers who appear in the *Message Recipients* field will receive one message for each course/section.



**Scheduling Messenger**

Scheduling Messenger sends schedule related messages to staff based on the criteria selected.

The Template Name and User/Group can be changed after selecting Save or Copy.

User/Group:  Template:

Enter the filter criteria for Scheduling Messenger:

Recipients:  Term:  Course Status:  Sections:

Recipient Selection

1100-1 Integrated Math I	Haag, Hakim (Primary)
2100-1 Geography A	Haag, Hakim (Primary)
3100-1 English 9	Harding, Jocasta (Primary)
4100-1 Physical Science A	Haag, Hakim (Primary)

Message Recipients

Haag, Hakim (1100-1 Integrated Math I)
Haag, Hakim (2100-1 Geography A)
Haag, Hakim (4100-1 Physical Science A)
Harding, Jocasta (3100-1 English 9)

Click on a person to add to list

Click on a person to remove from list

7. Delivery Device options include the process Inbox, Email, or both. If the <Email> button is selected, the user must provide a *Sender's Email* (unless a default one is set up by the district). Select which devices should receive the message.
8. Type in a *Sender's Email* in the field provided (if it is not hardcoded with a district provided one).
9. A default message is provided, but the user may create and save his/her own templates.

Delivery Devices: ☒ Inbox ☒ Email

Sender's Email:

Message Subject:

Message Body

**A change has been made for the following:**

Course:

Section:

Student:

Please review the roster for details of the scheduling change.

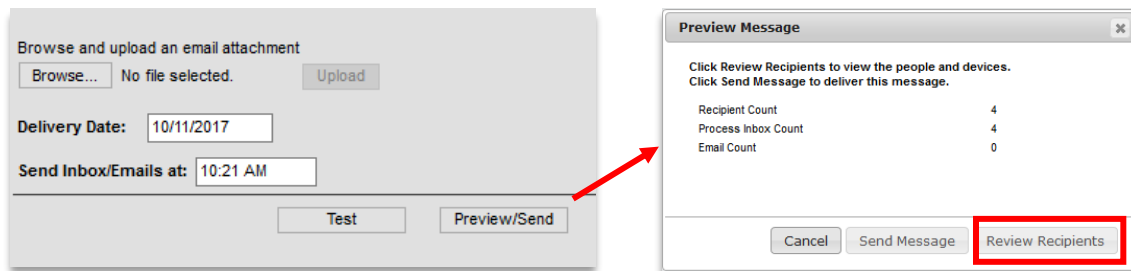
10. Enter Delivery Date and Send Inbox/Email time information. The current date and time automatically populate but can be modified.

11. If desired, the sender can send a test email by clicking the <Test> button and entering a test *Destination Email*.



12. If the digital repository is enabled, users also have the option of adding an attachment to the email message.

13. The <Preview/Send> button allows users to see the number of recipients, the number of messages going into Process Inboxes as well as those going to email. It is recommended to Review Recipients before sending.







14. Click on the <Review Recipients> button to review the recipients and the message. Click on the <Preview> button to review the message.

**Review Recipients**

Clear the checkboxes next to recipients or devices to prevent them from receiving the message. All eligible recipients display. However, only recipients with any of the following delivery devices displayed will receive the message: Process Inbox, email address, or a phone number (when Voice is enabled).

Select Save & Return to retain any changes to recipients. Select Cancel to go back to Preview Message without saving changes.

Message Preview			
<input checked="" type="checkbox"/>	Recipient Name	Student Name	Preview
<input checked="" type="checkbox"/>	Haag, Hakim <input checked="" type="checkbox"/> hakim@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John	
<input checked="" type="checkbox"/>	Haag, Hakim <input checked="" type="checkbox"/> hakim@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John	
<input checked="" type="checkbox"/>	Haag, Hakim <input checked="" type="checkbox"/> hakim@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John	
<input checked="" type="checkbox"/>	Harding, Jocasta <input checked="" type="checkbox"/> Jocasta@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John	

15. A Message Recipient Preview will appear in a new window for the user to review.

**Message Recipient Preview**

Recipient Name: Haag, Hakim  
 Device (1): hakim@hippohigh.org  
 Device (2): Process Inbox  
 Subject: Schedule Change

Message Body: A change has been made for the following:  
 Course: 1100 Integrated Math I  
 Section: 1  
 Student: John Blackledge  
 Please review the roster for details of the scheduling change.

Messages will be sent to both the Email account and the Process Inbox.

16. If the message conveys the correct information, click <Close>. The user will return to the Review Recipients screen.

17. Teachers can be moved from the recipient's list by unclicking the check mark on the teacher's name, Process Inbox or email box.



**Review Recipients**

Clear the checkboxes next to recipients or devices to prevent them from receiving the message. All eligible recipients display. However, only recipients with any of the following delivery devices displayed will receive the message: Process Inbox, email address, or a phone number (when Voice is enabled).

Select Save & Return to retain any changes to recipients. Select Cancel to go back to Preview Message without saving changes.

Save & Return Cancel

Message Preview	
<input type="checkbox"/> Recipient Name	Student Name
<input checked="" type="checkbox"/> Haag, Hakim <input checked="" type="checkbox"/> hakim@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John
<input type="checkbox"/> Haag, Hakim <input type="checkbox"/> hakim@hippohigh.org <input type="checkbox"/> Process Inbox	Blackledge, John
<input checked="" type="checkbox"/> Haag, Hakim <input checked="" type="checkbox"/> hakim@hippohigh.org <input type="checkbox"/> Process Inbox	Blackledge, John
<input checked="" type="checkbox"/> Harding, Jocasta <input type="checkbox"/> Jocasta@hippohigh.org <input checked="" type="checkbox"/> Process Inbox	Blackledge, John

Teachers can be removed from the recipients list by unchecking their names, their email address, or their Process Inbox.

18. If all of the information is correct, click <Save and Return>. This will return the user to the Preview message screen from which the user can send the message.
19. Once the message has been sent, the user will receive a message that the messages have been delivered. Click <OK>.

**Preview Message**

To view message delivery details go to Sent Message Log.

Recipient Count	4
Process Inbox Count	4
Email Count	4

OK

20. Navigate to *System Administration > Messenger > Sent Message Log* to view the Sent Message Log as needed. Note: Access to this log may be limited by tool rights. Contact the building or district admin to verify the contents of the Sent Message Log.



#### Sent Message Log

Created Between  and

Sent Message Log							
Status	Message Type	District/School	Message Subject	Sender	Date Created	Date Scheduled	ScheduleID
<input type="text" value="Waiting"/>	<input type="text" value="Schedule Ch."/>	<input type="text" value="Hippo High"/>	<input type="text" value="Schedule Change"/>	<input type="text" value="Admin, Ima"/>	<input type="text" value="10/11/2017 10:29 AM"/>	<input type="text" value="10/11/2017 11:10 AM"/>	<input type="text" value=""/>
Complete	Schedule Change	Hippo High	Schedule Change	Admin, Ima	10/11/2017 9:49 AM	10/11/2017 10:21 AM	

21. Navigate to *System Administration > Messenger > Recipient Log* to confirm recipients of the Schedule Change Message as needed. Note: Access to this log may be limited by tool rights. Contact the building or district admin to verify the contents of the Recipient Log.

#### Recipient Log

Scheduled Between  and

Recipient Log						
Message Type	Subject	Recipient	Student	Sender	Date Scheduled	
<input type="text" value="Schedule Change"/>	<input type="text" value="Schedule Change"/>	<input type="text" value="Haag, Hakim; Harding, Jocasta"/>	<input type="text" value="Blackledge, John"/>	<input type="text" value="Admin, Ima"/>	<input type="text" value="10/11/2017 11:10 AM"/>	
Schedule Change	Schedule Change	Haag, Hakim; Harding, Jocasta	Blackledge, John	Admin, Ima	10/11/2017 10:21 AM	

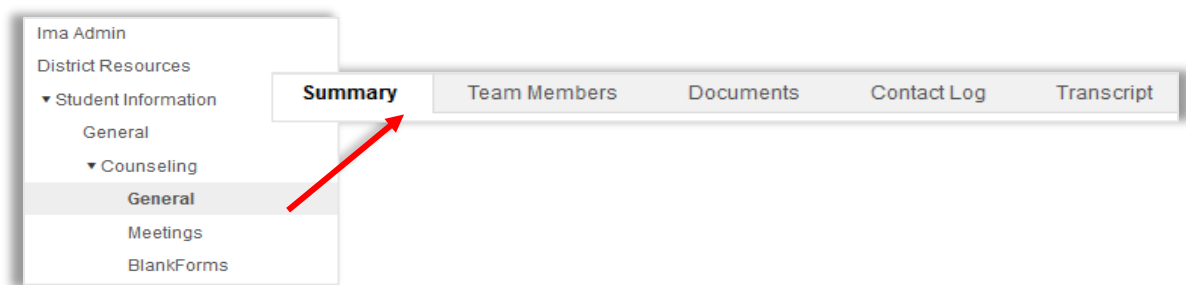
## STUDENT COUNSELING

Student Counselor information tabs act as a filing cabinet for a student's Counselor data. Counselor staff can easily access a student's Counselor information by selecting the associated tab. The information should only be viewed or modified by users who have a Counselor designation on their district assignment or are a system administrator.

### *Summary Tab*

The Summary tab displays the same information as the *Student Information > General* tab. It is like an emergency contact card for the student. It displays the demographics, address(es), phone number(s), and emergency contact(s) for the student as it has been entered in Census.

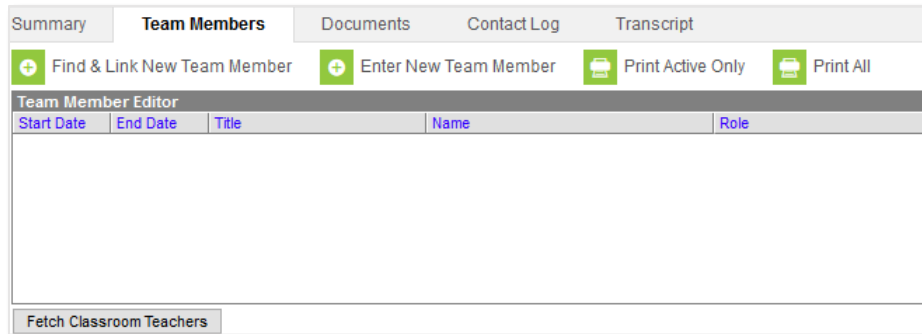
1. To view the student Summary tab, navigate to *Student Information > Counseling > General > Search* for a student. The Summary tab will display unless another Counseling tab has been previously viewed in which case the previous tab being viewed will display.



2. The Summary tab gives the Counseling staff three printing options:
  - a. *Person Summary Report*- this report generates a PDF copy of the information on the Summary Tab.
  - b. *Print Mailing Label*- this generates mailing labels for the student. They are compatible with 1" x 2-5/8" labels (Avery 5160).
  - c. *Print Envelope*- generates the address(es) as entered into Census for printing on a #10 envelope (4 1/8 x 9 1/2).

## Team Members

The Team Members tab lists all current and previous members of a student's counseling team. This team may include special education teachers, principals, counselors, parents/guardians, etc.



1. To view the student team tab, navigate to *Student Information > Counseling > General > Team Members*
2. Adding new team members -select <Find & Link New Team Member> to add a person who exists in Infinite Campus. Use <Enter New Team Member> if the team member is from an external organization and has not been entered into Infinite Campus (e.g. private tutor).
3. If <Find & Link New Team Member> was selected, select the person to be added.
  - a. Guardians will be located under the Census dropdown list.
  - b. Teachers that have this student on their roster will be located under the Classroom Teachers dropdown list.
  - c. Counseling staff will be located under the Counselor Staff dropdown list.
  - d. Other staff that may be listed in the Advisor Staff dropdown list.
 If <Enter New Team Member> was selected, enter as much of the data that is needed.
4. If adding a counselor, his/her role may be identified by selecting Counselor in the Role drop down list. Selecting this or any other role is for notation purposes only and has no effect within Campus.
5. Click the <Add Team Member> button at the bottom.
6. Repeat steps 1 through 4 for all members on the team.
7. <Fetch Classroom Teachers> adds all active teachers with start and stop dates based on scheduling terms with a read only role automatically.



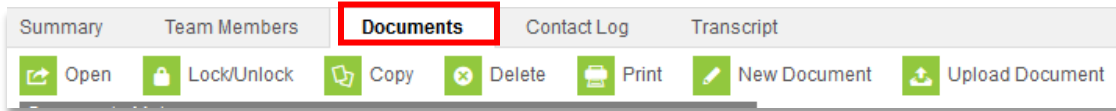
### Special Note:

Team Members that are already tracked in the system should be added using the <Find & Link new Team Member> tool. Team Members added through this interface will not appear in that user's caseload.



## ***Counseling Documents Tab***

The Counseling Documents tab allows districts to list all Counseling-related forms for a student. Educational documentation found within this tab is determined by the district and added using the forms established in System Administration.

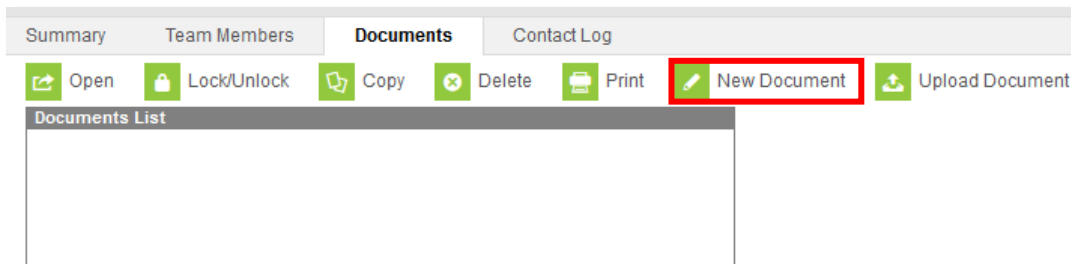


Documents available for uploading or adding must first be created in the Counseling Form Documents tool in System Administration. If a document is not in the Form Documents list or is in the Form Documents list but is not marked as active, Counseling staff will not be able to add a document to the student's Documents.

When viewing the Documents List, Documents are separated into different folders based on the form type and the calendar school year.

## **Adding a Document to the Document Tab from Existing Fillable Forms**

1. Navigate to *Student Information > Counseling > General > Documents* tab.
2. The Documents List appears. If any Documents apply to a student, they will appear in this list.
3. Select <New Document> to add a new document to the student.



4. The Create New Document Wizard appears. Click the radio button to put a checkmark next to "Create Custom Form" then select which Form to use from the drop down. Reminder: The forms are created by the district in System Administration.
5. Select an Enrollment to which the form will be attached in the Link to an Enrollment dropdown. This determines in which year the document displays. NOTE: When creating new forms, it can be linked to a specific enrollment as long as the enrollment does NOT have an end date. This includes future and current enrollments regardless of the selected Service Type.
6. Click <Create Document>.



- The document should automatically open in the workspace. Depending on the browser being used, it may need to be downloaded. In which case, click download and check the downloads folder to open the document.

The 'Create New Document Wizard' dialog box prompts the user to select a document. It includes a checkbox for 'Create Custom Form:', which is checked. Below this, there are two dropdown menus: 'Select a Form...' (currently showing '(No Form Selected)') and 'Link to an Enrollment...' (currently showing '17-18 Hippo High(07/01/2017-)'). At the bottom, it states 'DOCUMENT SELECTED FOR CREATION: (no document selected)' and has 'Create Document' and 'Cancel' buttons.

- Documents that have been created by the district in fillable-format will auto-populate with the student's name and any information that pertains to the student (DOB, Grade, etc.) as needed on the form.
- Type in the information to the form as needed. When finished, click <Save>. Note: <Save> appears on the top and bottom of FDF forms. By clicking either of the <Save> buttons it will save it to the students Documents Tab in the Forms folder.



### Special Note:

Users can upload PDF, FDF, and MS Word documents. These must be created and be made available by the district. The warning will appear and specify the type of document being downloaded. Certain types of documents require software that may not be available in all districts.

## Uploading a Document to a Student's Document Tab

If there are documents that are not created by the district but need to be stored in Counseling information, such as scanned transcripts or other documents, these can also be uploaded to the Documents tab.

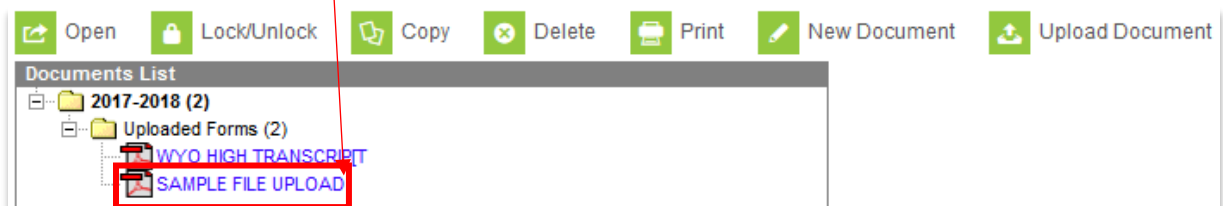
- While on the Documents tab, click on <Upload Document>.

The screenshot shows the 'Documents' tab in a software interface. At the top, there are tabs for 'Summary', 'Team Members', 'Documents' (which is active), and 'Contact Log'. Below the tabs is a toolbar with icons for 'Open', 'Lock/Unlock', 'Copy', 'Delete', 'Print', 'New Document', and 'Upload Document'. The 'Upload Document' button is highlighted with a red rectangle. Below the toolbar is a 'Documents List' table, which is currently empty.

- The Document File editor will appear.



3. Name the document how it should appear in the Documents list. This is a required field.
4. The default Date is the current date but can be modified. It is a required field.
5. May add Comments as needed.
6. Click <Browse> to select the file to upload. In the browse window, click <Open> when the document is selected or double-click on the document name to select it. Only .pdf, .txt, .doc, and .odt file types can be uploaded.
7. Click <Save> when finished. Uploaded documents will appear in the Uploaded Forms folder of the Document List.

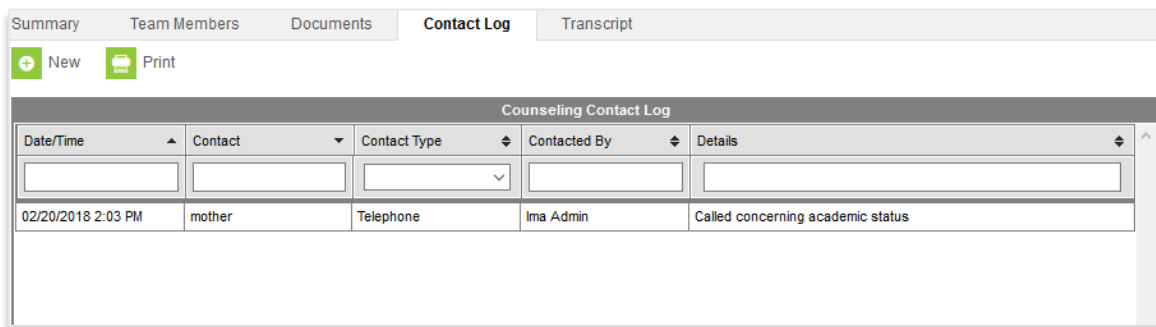


## ***Counseling Contact Log Tab***

The Contact Log offers the ability to store all instances of communication by the Counselor personnel regarding a particular student. This communication can be with the student, their guardians, or others, and could include letters, email, phone calls, and in-person meetings. Contact Types are determined at the district level. There is also the ability to filter and sort the Contact Log entries by date, contact, type of contact, who made the contact, and/or details. The Contact Log may also be printed for any student.

### ***Adding an Entry to the Contact Log***

1. Navigate to *Student Information > Counselor > General > Contact Log* tab. The Counseling Contact Log will appear.



Date/Time	Contact	Contact Type	Contacted By	Details
02/20/2018 2:03 PM	mother	Telephone	Ima Admin	Called concerning academic status

2. Click <New>. The Contact Log Detail editor will appear.
3. The Date will default to the current date but can be modified to reflect the correct date of contact. It is a required field.
4. The Time of contact will automatically populate with the current time but can be modified to reflect the correct time of contact. It is a required field.
5. Contacted By will be hard coded to the person who is entering the Contact Log entry.
6. Choose a Contact Type. This is how the person was contacted. These options are determined by the district in the Attribute/Dictionary.



7. Contact is who was contacted. Could be used to record the name of the individual or their relationship to the student, such as Parent/Guardian. It is best practice to have a common format for this field for sorting purposes. For example, if one time the counselor types “Mother” in this field and the next time types “Mom,” when the counselor tries to sort the log to see how many times the mother was



- contacted, the system does not recognize “Mom” and “Mother” are the same person. See the Sorting and Filtering section for more details.
- Details are additional information regarding the content or purpose of the communication. The field is limited to 500 characters. Only 65 characters show in the log list, but additional text is available upon hover. These can be pulled out in an Ad Hoc report.
  - Click <Save> to save the entry and add it to the Contact Log.

## Sorting and Filtering Entries in the Contact Log

- Entries in the Contact Log can be sorted by clicking next to the header titles.
- Hold the shift key to sort by multiple columns.
- Clicking on an entry in the log opens that entry in the detail window below.
- To filter the log, enter or select a value below the column header. Only entries containing that value will be shown.

Summary Team Members Documents **Contact Log** Transcript

New Print

**Counseling Contact Log**

Date/Time ▲	Contact ▼	Contact Type ◆	Contacted By ◆	Details ◆
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
02/20/2018 2:03 PM	mother	Telephone	Ima Admin	Called concerning academic status
02/01/2018 1:08 PM	MOTHER	U.S. Mail	Ima Admin	TEAM MEETING
01/08/2018 9:32 AM		In Person	Ima Admin	SCHEDULING INTERVIEW

**Counseling Contact Log**

Date/Time ▲	Contact ▼	Contact Type ◆	Contacted By ◆	Details ◆
<input type="text"/>	<input type="text"/>	Telephone ▼	<input type="text"/>	<input type="text"/>
02/20/2018 2:03 PM	mother	Telephone	Ima Admin	Called concerning academic status



## Printing Entries from the Contact Log

1. The entries of the Contact Log can be printed by selecting the <Print> button.
2. A dialog box will appear with print options.
3. Choose the Date range to print by selecting a Start date and End date. Start date is the earliest date for which contact records should be included. End date is the last date for which contact records should be included. These are required fields.
4. If desired, the user can choose a specific Contact Type, multiple Types or all Types. To select more than one but not all Types on a PC hold the Ctrl key and click on the Types to print. On a Mac hold the Command key and click on the Types to print.

5. If desired, the user can choose to print only entries by who initiated the contact by selecting one, some, or all in the Contacted by field. To select more than one but not all Contact initiators on a PC hold the Ctrl key and click on the names to print. On a Mac hold the Command key and click on the names to print.
6. The Contact field allows a user to filter the report to include only who is typed into the text. Caution: This field will only pull what is put in, or similar. For example, if the user wants to pull all contact made to the Mother and someone put Mom instead of Mother, the Contacted report will not display Mom; it will only pull contacts that include Mother.



Alborough, Dallas		Counseling Contact Log	
Birth Date:01/01/2001 Student Number:109301 Current Grade:12 Current School:Hippo High		01/01/2018 - 02/21/2018 Contact Type:All Contacted By:All Page 1 of 1	
Date/Time	Type	Contacted	Contacted by
01/08/2018 9:32 AM	In Person SCHEDULING INTERVIEW		Ima Admin
02/01/2018 1:08 PM	U.S. Mail TEAM MEETING	MOTHER	Ima Admin
02/20/2018 2:03 PM	Telephone Called concerning academic status	mother	Ima Admin

What is entered in the Contacted field will be what displays on the report.

Alborough, Dallas		Counseling Contact Log	
Birth Date:01/01/2001 Student Number:109301 Current Grade:12 Current School:Hippo High		01/01/2018 - 02/28/2018 Contact Type:Telephone Contacted By:All Page 1 of 1	
Date/Time	Type	Contacted	Contacted by
02/20/2018 2:03 PM	Telephone Called concerning academic status	mother	Ima Admin

- The user also has the option to sort the entries by Date in ascending or descending order or by who made the contact (Contacted By).
- When the options have been selected, click <Print>. A PDF report will generate to print and/or save.

Note: To print all Contacts, leaved the Contacted field blank.

## Transcript Tab

The Transcript tab displays the same information as the *Student Information > General > Transcript* tab. However, it is in a new format.

1. To view the student Transcript tab, navigate to *Student Information > Counseling > General > Search* for a student select the Transcript tab
2. Required fields are marked with asterisks. Depending on the screen and resolution a slider bar appears allowing the user to view all transcript information.
3. The default view shows information grouped by year sorted by course number.

**Abart, Ann**  
Grade: 11 #10850061 DOB: 05/15/2001 Gender: F

Summary Team Members Documents Contact Log **Transcript**

↓ Year × Drag column headers here to change grouping

	Year*	Transfer School Name	Grade*	Course Number*	Course Name	Score
▼ Year: 2017						
Edit	16-17	Rydell High School	10	0106	English 10	90
Edit	16-17	Rydell High School	10	0209	US Hist & Govt	81
Edit	16-17	Rydell High School	10	0308	Biology	94
Edit	16-17	Rydell High School	10	0454	Math 10-AP	96
Edit	16-17	Rydell High School	10	0706	Spanish II	94

Add Row ▼ Reports

4. Columns not grouped can be sorted by clicking on the arrow to reverse the existing sort.

↓ Year ×

	Year*	Transfer School Name	Grade*	Course Number*	Course Name ↑
▼ Year: 2017					
Edit	16-17	Rydell High School	10	0308	Biology
Edit	16-17	Rydell High School	10	0106	English 10
Edit	16-17	Rydell High School	10	0454	Math 10-AP



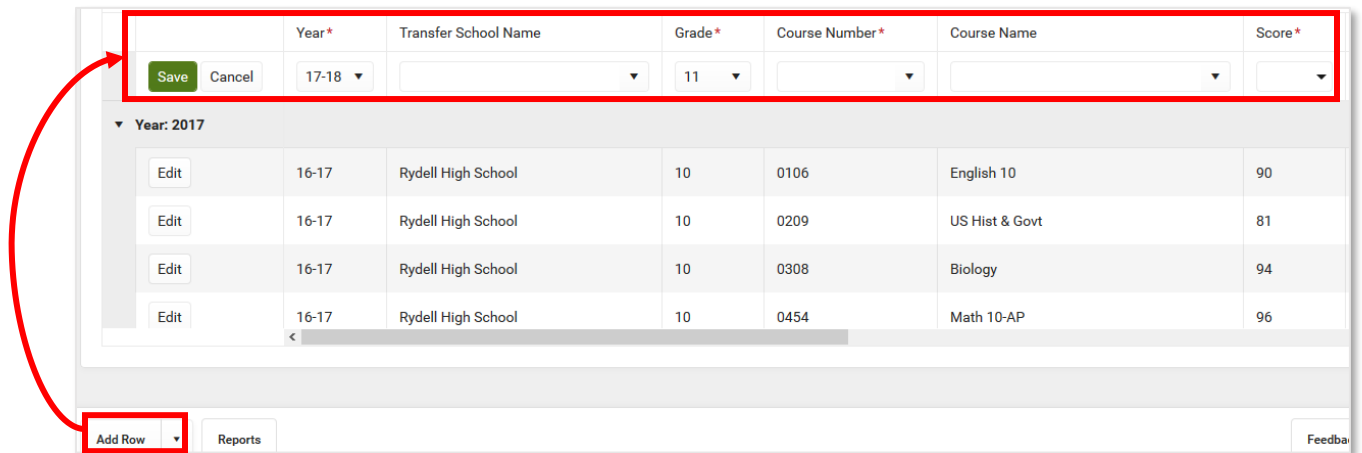
## Manage Transcript Records from the Master Screen

Use the following procedures to add new transcript records and modify existing records on the Master Screen.

### Add a New Row

1. Click the <Add Row> icon at the bottom of the page. A blank row for the current school year displays. If the record is for a different school year, choose that year from the dropdown.
2. Type or search for the correct values for the columns. A value can only be entered if the correct tool rights are assigned.
3. Click the <Save> icon at the beginning of the row when finished.

Click the <Cancel> icon to remove any values that were entered but should not be saved.

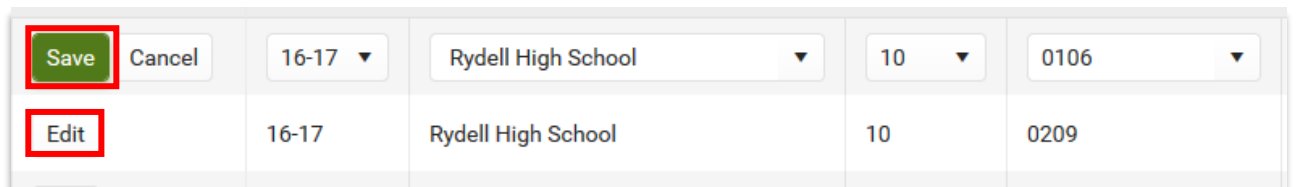


	Year*	Transfer School Name	Grade*	Course Number*	Course Name	Score*
<b>Save</b> <b>Cancel</b>	17-18 ▼		11 ▼			
▼ Year: 2017						
<b>Edit</b>	16-17	Rydell High School	10	0106	English 10	90
<b>Edit</b>	16-17	Rydell High School	10	0209	US Hist & Govt	81
<b>Edit</b>	16-17	Rydell High School	10	0308	Biology	94
<b>Edit</b>	16-17	Rydell High School	10	0454	Math 10-AP	96

**Add Row** ▼ **Reports** **Feedback**

### Update Existing Record

1. Select the row that needs to be updated and click the <Edit> button to use in-row editing functionality.
2. Make the necessary updates in the row.
3. Click the <Save> icon at the beginning of the row when finished.



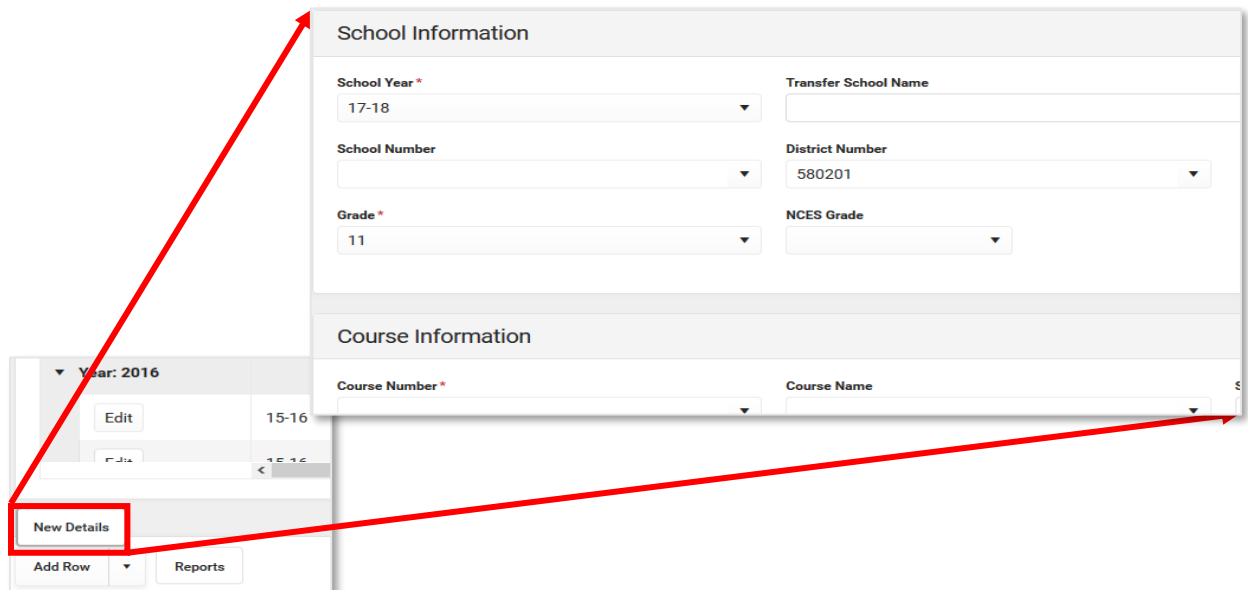
<b>Save</b> <b>Cancel</b>	16-17 ▼	Rydell High School ▼	10 ▼	0106 ▼
<b>Edit</b>	16-17	Rydell High School	10	0209

## Manage Transcript Records from the Detail Screen

Use the following procedures to add new transcript records and modify existing records on the Detail Screen.

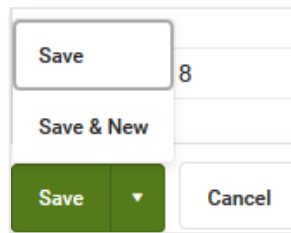
### Add a New Detail Record

1. Click the arrow next to the <Add Row> button from the bottom of the Master screen to choose the <New Details> option. A new blank Detail record displays.
2. Enter the transcript information into the appropriate fields. Note that when certain selections are made, like the School Name field is populated, other fields auto-populate.



The screenshot shows the 'New Details' button highlighted in the Master screen. A red arrow points from this button to the 'School Information' section of the detail form. Another red arrow points from the 'Course Information' section of the detail form back to the Master screen. The 'School Information' section includes fields for School Year (17-18), School Number, Grade (11), Transfer School Name, District Number (580201), and NCES Grade. The 'Course Information' section includes fields for Course Number and Course Name.

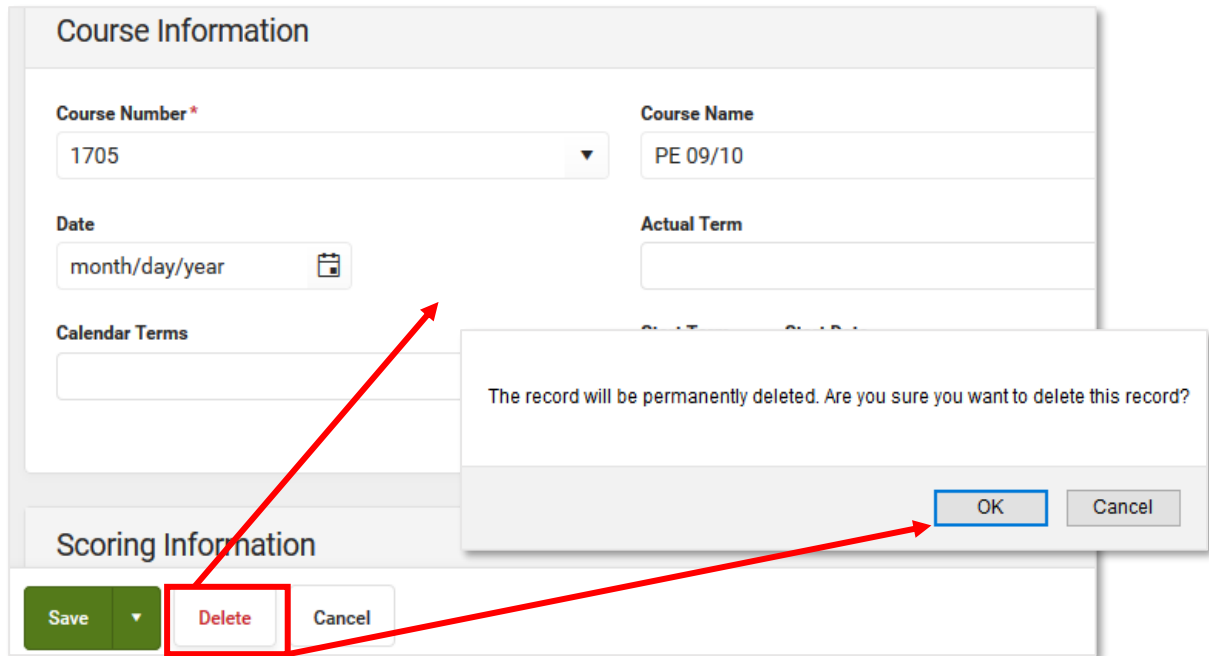
3. Click the <Save> icon when finished. The new record is saved and the Transcript returns to the Master screen.
4. To continue adding detail records, click the <arrow> next to the <Save> button and choose <Save & New>. A new blank detail record displays for additional entry. School information is automatically populated from the previously entered record.



The screenshot shows a dropdown menu for the 'Save' button. The options are: 'Save', 'Save & New', 'Save' (with a dropdown arrow), and 'Cancel'.

### ***Delete a Transcript Record***

When a record needs to be permanently and completely removed, click on the item from the Master Screen. The Detail Screen displays. Then, click the <Delete> button. Acknowledge the pop-up that indicates the record will be permanently deleted by clicking <OK> (record is deleted) or <Cancel> (record is not deleted).



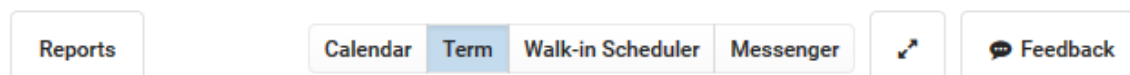
The screenshot shows a software interface with two main sections: 'Course Information' and 'Scoring Information'. The 'Course Information' section contains fields for 'Course Number \*' (with a dropdown menu showing '1705'), 'Course Name' (with a text input showing 'PE 09/10'), 'Date' (with a text input showing 'month/day/year' and a calendar icon), and 'Actual Term' (with a text input). The 'Scoring Information' section is partially visible below. A confirmation dialog box is overlaid on the right side of the screen, displaying the text: 'The record will be permanently deleted. Are you sure you want to delete this record?'. The dialog box has two buttons: 'OK' and 'Cancel'. A red arrow points from the 'Delete' button in the 'Scoring Information' section to the 'OK' button in the dialog box. Another red arrow points from the 'Delete' button in the 'Scoring Information' section to the 'Delete' button in the 'Scoring Information' section.

## ***Schedule Tab (Counseling)***


The Schedule tab allows users to view and print the student's scheduled courses in multiple formats. The student's schedule can be used to find where the student is during the day, to determine which courses the student should be taking in future years and to print the student's schedule.

## ***Navigating the new Scheduling Tab***

### General Navigation



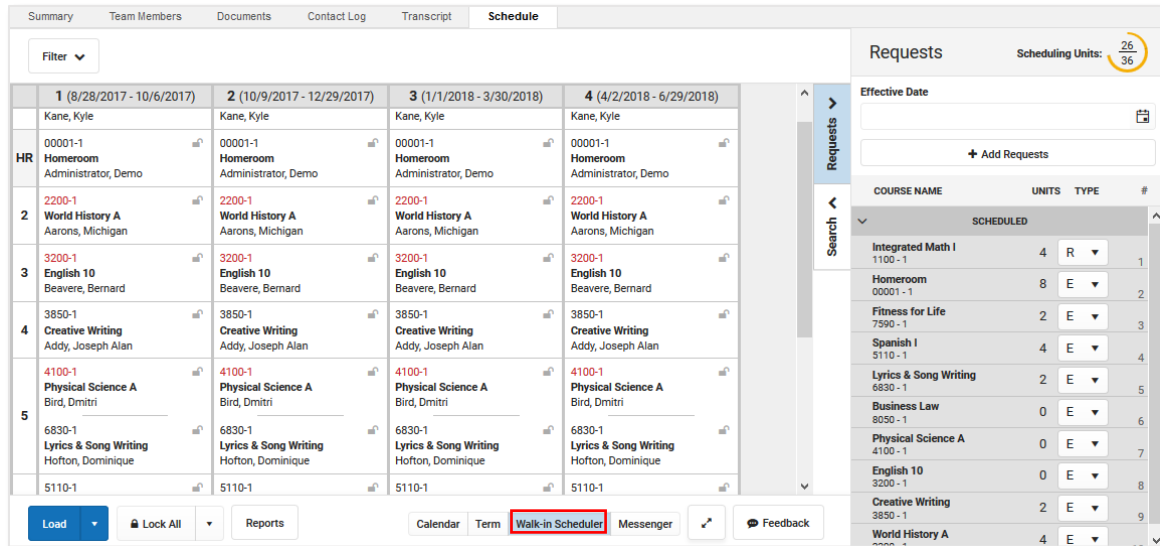
<Reports>	<p>Access <b>Schedule Reports</b> by choosing the &lt;Reports&gt; button from the bottom of the page. Available reports display in the side panel. The current view and the print view options that are selected when the Reports panel is open is what prints in PDF format.</p> <p>A report can also be printed for courses scheduled into periods without times by selecting the Current View or the Periods without Times print options while in the Calendar View.</p> <p>Any scheduled Responsive courses are included in the reports. Any courses that are dropped in the future are included in the reports.</p>
<Calendar>	<p>When displaying the schedule in the <b>Calendar</b> view, the student's schedule can be displayed for the <b>Day</b>, for the <b>Week</b>, or in an <b>Agenda</b> layout. See the Calendar View section for more information on each of these options.</p> <p>Automatic scrolling to the current time of day occurs when viewing the schedule. If a counselor is looking for a specific student at 10:15, opening the schedule tab lets the counselor see which class that student is in and where.</p>
<Term>	<p>Choose the <b>Term View</b> button to display the Schedule organized by the term (Quarters, Trimesters, etc.).</p> <p>For schools that use multiple period schedules, the schedules are labeled within each term.</p> <p>For schools that use more than one term structure, the switcher in the top right displays options to navigate to the correct term structure.</p> <p>Periods where the student is not scheduled into a course section are gray and the field displays <i>No Scheduled Course</i>.</p> <p>Periods where the scheduled course section does not meet (school holiday or other non-instruction day) are gray and the field displays <i>No Scheduled Course</i>.</p> <p>Diagonal gray bars indicate the calendar does not contain courses in those periods for those days.</p>

<Walk-in Scheduler>	Use the <Walk-In Scheduler> to modify the student's Schedule. The Walk-In Scheduler button can be selected from either the Term View or Calendar View; modifications to the student's schedule (course requests, drop/add courses, etc.) can only be made in the Walk-In Scheduler.
<Messenger>	Use the Scheduling Messenger to send messages to the student's current teachers by choosing the <Messenger> button.
	Use the <Full Screen> icon to display just the schedule in the entire browser window. This removes all tabs, all indexes, all headers, and just displays the schedule. This can be done in either the Calendar View or Term View.  Click the icon again or click the <b>ESC</b> key to return to a non-full screen view.
Feedback	Submit feedback for the new Schedule using the <b>Feedback</b> button in the bottom right hand corner. This takes you to the Campus Community Schedule forum topic where you can add your concerns or suggestions for potential future development related to the Student Schedule.

### Walk-In Scheduler (Counseling)

The Walk-In Scheduler allows modification of a student's schedule, whether a student needs to drop and add a course, or a new student enrolls in the school at any time during the year. Changes made to the student's schedule occur in real time, which means when a student is added to a course section, the teacher of that course section can see the student was added to the course roster, and can record attendance for that student and begin tracking assignments for that students.

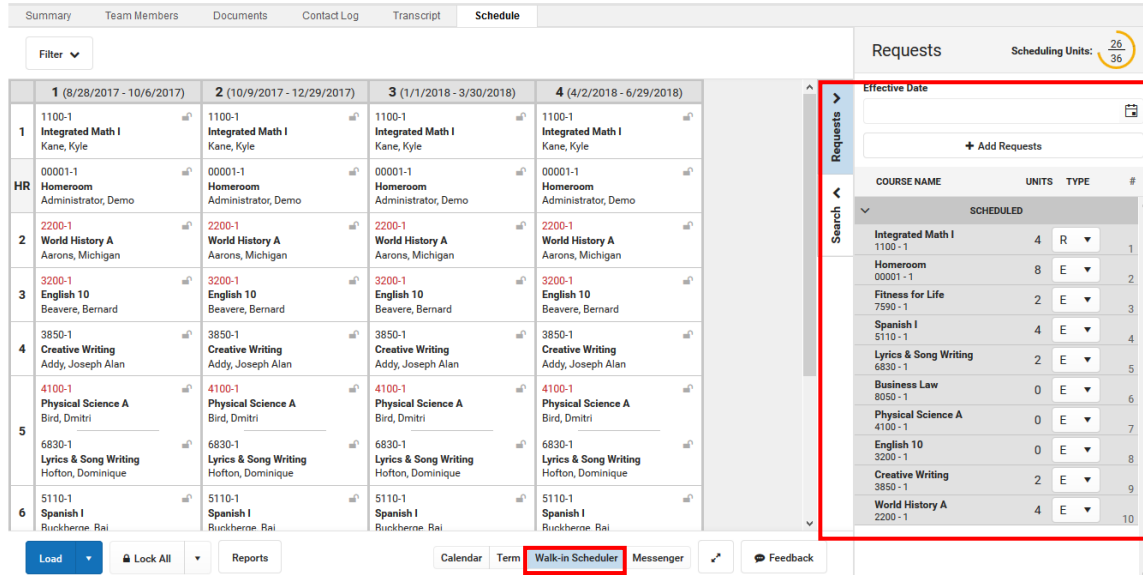
The Walk-In Scheduler is accessed from the Student's Schedule. Click the <Walk-In Scheduler> button in the action bar at the bottom of the page.



The screenshot displays the Infinite Campus Student Schedule interface. At the top, there are tabs for Summary, Team Members, Documents, Contact Log, Transcript, and Schedule. The Schedule tab is active. Below the tabs, there is a filter dropdown and a table showing the student's schedule for four terms: 1 (8/28/2017 - 10/6/2017), 2 (10/9/2017 - 12/29/2017), 3 (1/1/2018 - 3/30/2018), and 4 (4/2/2018 - 6/29/2018). The student's name is Kane, Kyle. The schedule shows various courses such as Homeroom, World History A, English 10, Creative Writing, Physical Science A, and Lyrics & Song Writing. On the right side, there is a Requests section with a Scheduling Units indicator showing 26/36. Below the Requests section, there is a list of scheduled courses with columns for Course Name, Units, Type, and #. At the bottom of the interface, there is an action bar with buttons for Load, Lock All, Reports, Calendar, Term, Walk-In Scheduler (highlighted with a red box), Messenger, and Feedback.

## Manage Course Requests

Course requests are managed using the **Requests Panel**, which opens on the right hand side of the student's Schedule.



Summary Team Members Documents Contact Log Transcript **Schedule**

Filter ▾

Requests Scheduling Units: 26/36

Effective Date

+ Add Requests

COURSE NAME	UNITS	TYPE	#
<b>SCHEDULED</b>			
Integrated Math I 1100-1	4	R ▾	1
Homeroom 00001-1	8	E ▾	2
Fitness for Life 7590-1	2	E ▾	3
Spanish I 5110-1	4	E ▾	4
Lyrics & Song Writing 6830-1	2	E ▾	5
Business Law 8050-1	0	E ▾	6
Physical Science A 4100-1	0	E ▾	7
English 10 3200-1	0	E ▾	8
Creative Writing 3850-1	2	E ▾	9
World History A 2200-1	4	E ▾	10

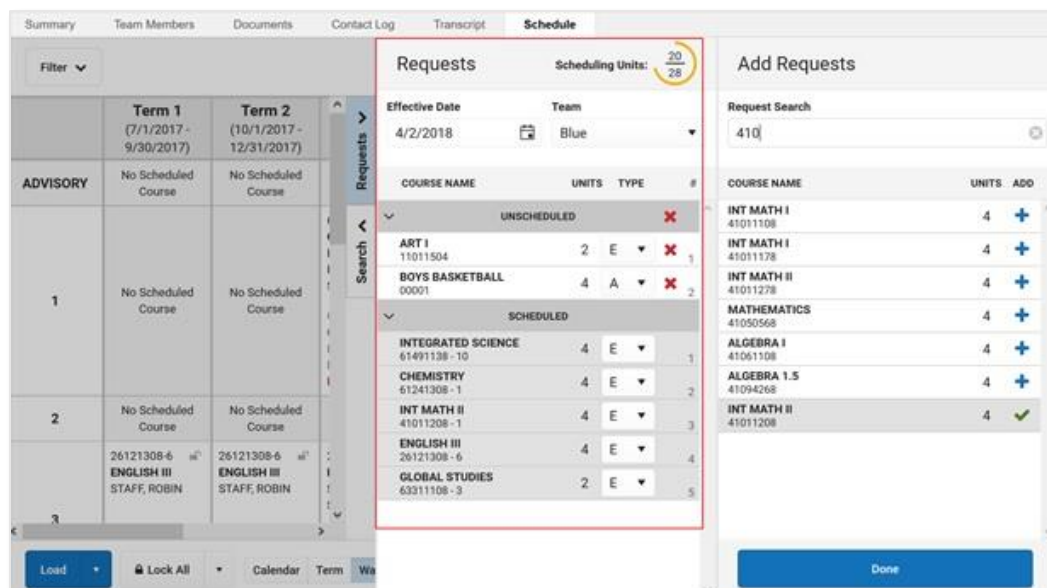
Load ▾ Lock All ▾ Reports

Calendar Term **Walk-in Scheduler** Messenger Feedback

## Requests Panel and Add Requests Panel Details

The Requests Panel stores the courses the student has requested. Courses into which the student is already scheduled display in the Scheduled section in a gray table. Courses into which the student has not been scheduled display in an Unscheduled section.

## Requests Panel



Summary Team Members Documents Contact Log Transcript **Schedule**

Filter ▾

Requests Scheduling Units: 20/28

Effective Date 4/2/2018 Team Blue

COURSE NAME	UNITS	TYPE	#
<b>UNSCHEDULED</b>			
ART I 11011504	2	E ▾	1
BOYS BASKETBALL 00001	4	A ▾	2
<b>SCHEDULED</b>			
INTEGRATED SCIENCE 61491138-10	4	E ▾	1
CHEMISTRY 61241308-1	4	E ▾	2
INT MATH II 41011208-1	4	E ▾	3
ENGLISH III 26121308-6	4	E ▾	4
GLOBAL STUDIES 63311108-3	2	E ▾	5

Load ▾ Lock All ▾ Calendar Term Walk-in Scheduler

Add Requests

Request Search 410

COURSE NAME	UNITS	ADD
INT MATH I 41011108	4	+
INT MATH I 41011178	4	+
INT MATH II 41011278	4	+
MATHEMATICS 41050568	4	+
ALGEBRA I 41061108	4	+
ALGEBRA 1.5 41094268	4	+
INT MATH II 41011208	4	✓

Done

Item	Description
<b>Scheduling Units</b>	<p>The total number of Scheduling Units (potential credits) the student has scheduled displays at the top right. The bottom number indicates how many total units can be scheduled for a complete course schedule; the top number indicates how many units the student currently has requested, including the total already scheduled.</p> <p>The total number of scheduling units is the number of instructional course periods (set on the Course tab in the Terms field) multiplied by the number of terms in the calendar.</p> <p>The color of the circle changes depending on the number of units requested, as does the total completion of the circle.</p> <ul style="list-style-type: none"> <li>• A complete schedule (100%, top number is the same as bottom number) is green.</li> <li>• A schedule that is between 67% and 99% completed is yellow.</li> <li>• A schedule that is between 34% and 66% completed is orange.</li> <li>• A schedule that is between 0% and 33% completed is red.</li> </ul> <p>Decimals are rounded to the nearest whole number. A value of 33.8% rounds to 34 and displays orange; a value of 32.4% rounds to 32 and displays red.</p> <p>When a student has no requests, the completion circle does not display. Dropped course units are not included in the total scheduling units. When requests are added or removed, the Scheduling Units value changes accordingly.</p>
<b>Effective Date</b>	<p>The entered date determines when the student begins attending the course section.</p> <p>Entered dates must be within the term dates of when the course meets.</p>
<b>Team</b>	<p>Teams are created in Scheduling Groups and can be used as a cohort function (often at Middle or Elementary schools), so all students assigned to that team are together in all courses. Teams are assigned to course sections, and when using the Schedule Wizard to create schedules for the next year are included in the logic of loading section rosters. This only appears when Scheduling Groups are created for that school.</p> <p>A student can only be on one team at a time. If a section of a course has been designated for a particular team, only students on that team may be loaded into that section. However, a student can be manually added to that section, overriding the team feature if needed.</p>
<b>Add Requests</b>	<p>Opens the Add Requests panel where courses can be requested for placement.</p>
<b>Course Types</b>	<p>Requested courses are organized into the following groups:</p>



	<ul style="list-style-type: none"> <li>• <b>Inactive</b> - courses that are currently not offered in the selected calendar (the Active checkbox is not marked). These display in red background.</li> <li>• <b>No Sections</b> - courses that do not have any course sections created, which means the course cannot be placed on the student's schedule. These display in a yellow background.</li> <li>• <b>Unscheduled</b> - courses that were added as requests, but have not yet been added to the student's schedule. These display in a white background.</li> <li>• <b>Scheduled</b> - courses into which the student is currently scheduled and attending on a regular basis. These display in a gray background.</li> <li>• <b>Dropped</b> - courses into which the student was scheduled at one time during the school year, but the student is no longer scheduled into them. These display in a gray background.</li> </ul> <p>Each group can be collapsed or expanded by clicking the arrow to the left of the header.</p> <p>For Unscheduled, Inactive or No Sections types, click the red <b>X</b> to remove the course from the list of requested courses.</p>
<b>Course Name</b>	The name of the course is listed in bold text, as it was entered into Campus (either in the Course Master or in Courses). The Course Number displays below the course name.
<b>Units</b>	Indicates the number of scheduling units that course meets. It correlates to the number of terms for which the course meets, and is used in the Scheduling Units calculation.
<b>Type</b>	<p>Each request is assigned a request type - Required, Elective or Alternate. These are used in the Schedule Wizard logic when placing courses sections for students.</p> <ul style="list-style-type: none"> <li>• A <b>Required Request (R)</b> must be on the student's list of course requests. If using MYAP functionality, required requests are also entered when adding courses to academic plans (if they are not locked).</li> <li>• An <b>Elective Request (E)</b> is a request from the student (or parent) asking for the course to be in the list of course requests.</li> <li>• An <b>Alternate Request (A)</b> is a request that is used to fill gaps in the schedule or if required and elective requests could not be placed on the schedule.</li> </ul> <p>The assigned types can be changed as desired.</p>
<b>Number</b>	Indicates the order in which requests were added, and is used in placing the student into those courses (requests with a number of 1 are attempted to be placed before a request with a number of 4). The count of requests is per Course Type.





## Add Requests Detail

SummaryTeam MembersDocumentsContact LogTranscriptSchedule

Filter

	Term 1 (7/1/2017 - 9/30/2017)	Term 2 (10/1/2017 - 12/31/2017)
ADVISORY	No Scheduled Course	No Scheduled Course
1	No Scheduled Course	No Scheduled Course
2	No Scheduled Course	No Scheduled Course
3	26121308-6 ENGLISH III STAFF, ROBIN	26121308-6 ENGLISH III STAFF, ROBIN

LoadLock AllCalendarTermW

Requests

Scheduling Units: 20/28

Effective Date: 4/2/2018Team: Blue

COURSE NAME	UNITS	TYPE	#
UNRESCHEDULED			
ART I 11011504	2	E	1
BOYS BASKETBALL 00001	4	A	2
RESCHEDULED			
INTEGRATED SCIENCE 61491138 - 10	4	E	1
CHEMISTRY 61241308 - 1	4	E	2
INT MATH II 41011208 - 1	4	E	3
ENGLISH III 26121308 - 6	4	E	4
GLOBAL STUDIES 63311108 - 3	2	E	5

Add Requests

Request Search: 410

COURSE NAME	UNITS	ADD
INT MATH I 41011108	4	+
INT MATH I 41011178	4	+
INT MATH II 41011278	4	+
MATHEMATICS 41050568	4	+
ALGEBRA I 41061108	4	+
ALGEBRA 1.5 41094268	4	+
INT MATH II 41011208	4	✓

Done

Item	Description
<b>Request Search</b>	<p>Allows the searching courses for which to add a request. A course name or a course number can be entered, either in its entirety or part of the name/number.</p> <p>The search field returns results based on the entered values. If part of a course number is entered, or part of the course name, the list of matching courses changes. For a course number of 123456, if the entered value is 234, any courses that 234 value are returned. A value must be entered.</p>
<b>Course Name</b>	The name of the course is listed in bold text, as it was entered into Campus (either in the Course Master or in Courses). The Course Number displays below the course name.
<b>Units</b>	Indicates the number of scheduling units that course meets. It correlates to the number of terms for which the course meets, and is used in the Scheduling Units calculation.
<b>Add</b>	<p>Indicates the course can be added to the list of requested courses.</p> <ul style="list-style-type: none"> <li>• <b>Blue plus sign</b> - the course can be added</li> <li>• <b>Green check mark</b> - the course already exists on the student's schedule. These courses display in gray background.</li> <li>• <b>Red X</b> - the course can be removed from the Request Panel.</li> <li>• <b>Red down arrow</b> - the course has been dropped. These courses display in gray background.</li> </ul>
<b>Done</b>	Closes the Add Requests Panel.

### **Add Requests**

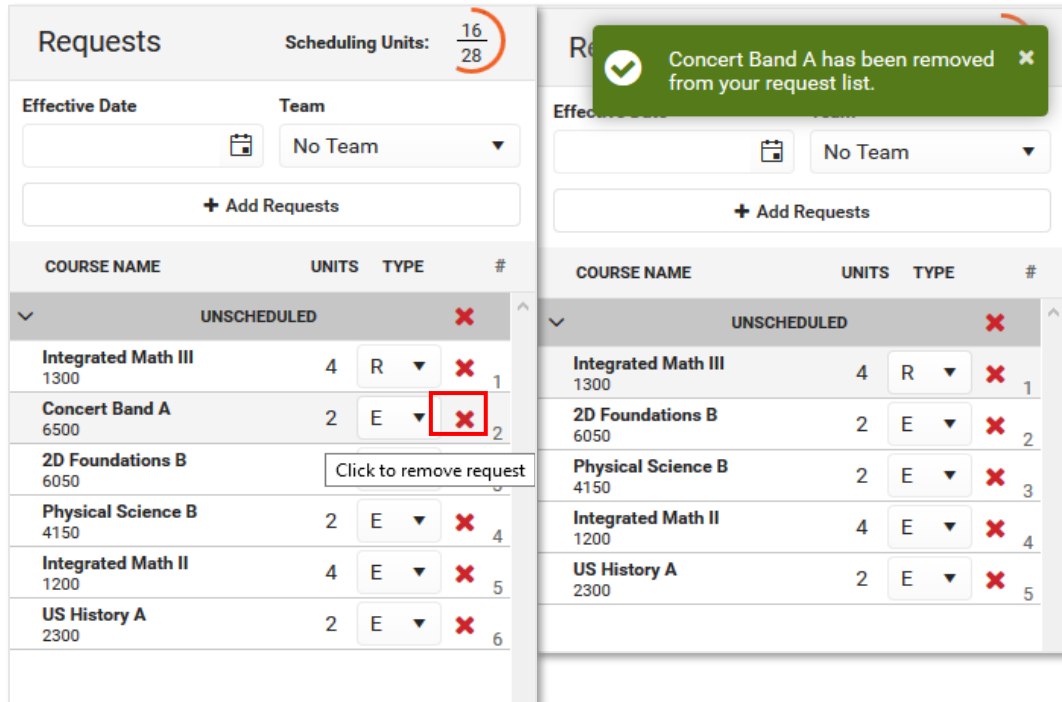
1. From the **Requests** panel, click the <Add Requests> button. An **Add Requests** panel displays with a list of active courses in the selected calendar. Courses that are not marked active are not included.
2. Search for courses by typing in a course number or a course name.
3. When the desired course is found, click the <blue plus sign>. A green message displays indicating it's been added the list of requested courses. The added course also displays in a list of **Unscheduled** courses, meaning the course has not yet been added to the student's schedule.
4. Repeat steps 1-3 as needed.
5. When finished added course requests, click the <Done> button in the Add Requests panel. The Add Requests panel closes.

## Remove Non-Scheduled Course Requests

It is possible that some requested courses could not be placed on the student's schedule after requests were loaded. This could be due to the requested courses being full, or the courses didn't fit into available periods for the student. These requested become "Unscheduled requests", and can be left alone. Or, to keep the Request panel clean (perhaps after the next year's schedule process is complete), these requests can be removed.

### Remove a Single Non-Scheduled Course Request

Click the red X next to the course request that is to be removed. A confirmation that the course request was removed displays.

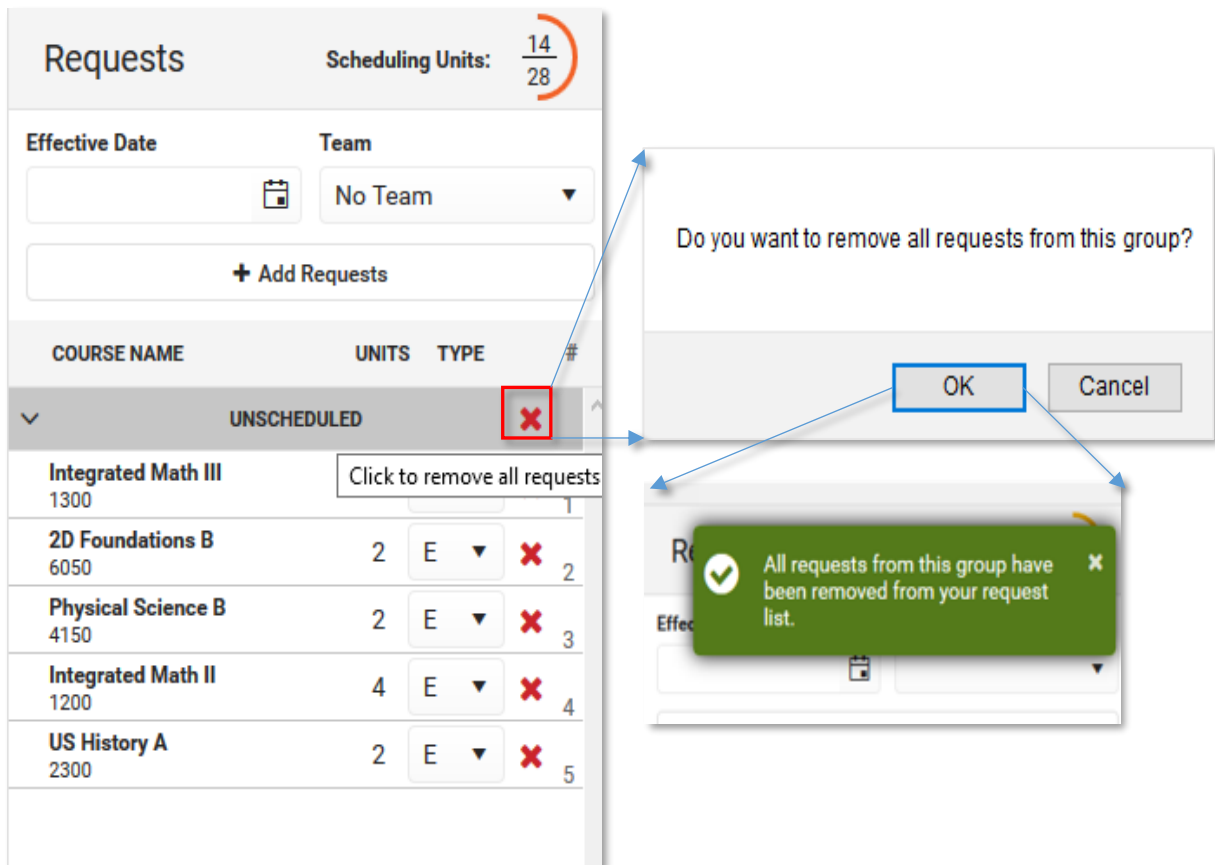


The screenshot shows the 'Requests' panel in Infinite Campus. The 'Scheduling Units' are 16/28. The 'Effective Date' is set to 'No Team'. The 'Add Requests' button is visible. The 'UNSCHEDULED' section is expanded, showing a list of course requests. The 'Concert Band A' request (6500) is highlighted with a red box around the red X icon. A confirmation message is displayed: 'Concert Band A has been removed from your request list.' The table below shows the list of requests.

COURSE NAME	UNITS	TYPE	#
Integrated Math III 1300	4	R	1
Concert Band A 6500	2	E	2
2D Foundations B 6050			
Physical Science B 4150	2	E	4
Integrated Math II 1200	4	E	5
US History A 2300	2	E	6

## Remove All Non-Scheduled Course Requests

Click the red <X> in the Unscheduled Course Types. A pop-up displays indicating this is the desired action - **that all courses from the list of Unscheduled Requests should be removed**. Click **OK** to continue. A confirmation that the course requests were removed displays.



**Requests** Scheduling Units:  $\frac{14}{28}$

Effective Date:  Team: No Team

+ Add Requests

COURSE NAME	UNITS	TYPE	#
<b>UNSCHEDULED</b> <span style="color: red; border: 1px solid red; padding: 2px;">X</span>			
Integrated Math III 1300			1
2D Foundations B 6050	2	E ▼ <span style="color: red;">X</span>	2
Physical Science B 4150	2	E ▼ <span style="color: red;">X</span>	3
Integrated Math II 1200	4	E ▼ <span style="color: red;">X</span>	4
US History A 2300	2	E ▼ <span style="color: red;">X</span>	5

Click to remove all requests

Do you want to remove all requests from this group?

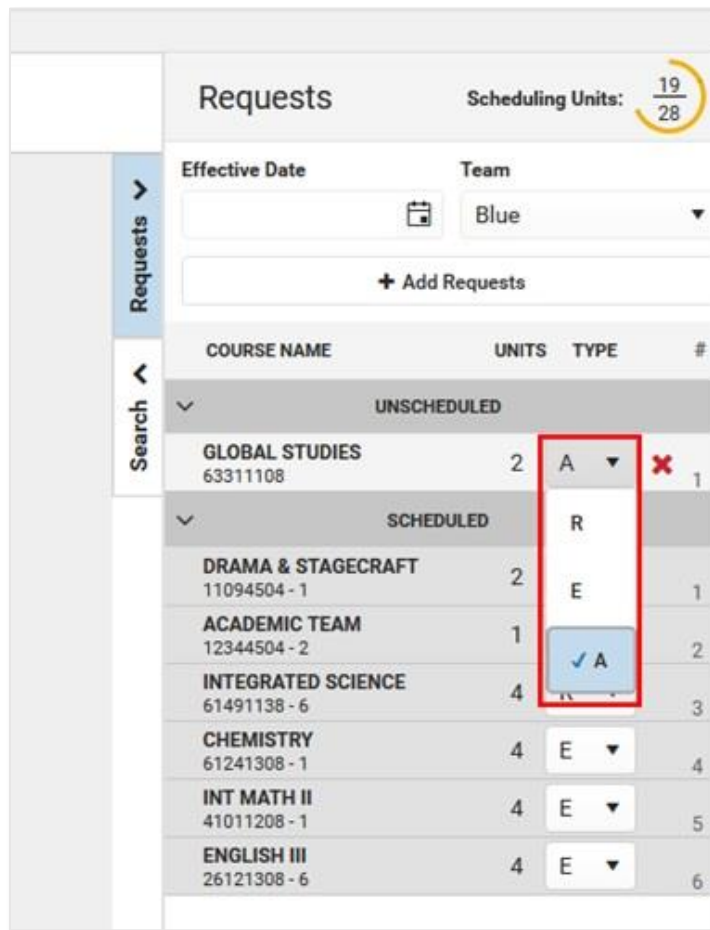
OK Cancel

All requests from this group have been removed from your request list.

## Change Request Types

For each course request, it is assigned a Type of R (required), E (elective) or A (alternate). Requests marked as R or E are given a higher priority in placement on a student's schedule, and tend to indicate the student would like to take those courses more than course requests marked as alternate. Note that these request types do not indicate a certain course is required for graduation. Those courses are set in Graduation Programs and are given even higher priority in the scheduling process.

Any request type can be changed to another request type by choosing the arrow next to the type and selecting a different option. A green checkmark indicates that is the currently selected type. The change is automatically saved and the list of course requests is updated.



The screenshot shows the 'Requests' interface. At the top, there's a 'Scheduling Units' indicator showing 19/28. Below this, there are filters for 'Effective Date' and 'Team' (set to 'Blue'). A '+ Add Requests' button is present. The main table lists course requests with columns for 'COURSE NAME', 'UNITS', 'TYPE', and '#'. The table is divided into 'UNSCHEDULED' and 'SCHEDULED' sections. In the 'UNSCHEDULED' section, 'GLOBAL STUDIES 63311108' is listed with 2 units and type 'A', with a red 'X' icon. In the 'SCHEDULED' section, several courses are listed: 'DRAMA & STAGECRAFT 11094504 - 1' (2 units, type 'R'), 'ACADEMIC TEAM 12344504 - 2' (1 unit, type 'E'), 'INTEGRATED SCIENCE 61491138 - 6' (4 units, type 'A' with a green checkmark), 'CHEMISTRY 61241308 - 1' (4 units, type 'E'), 'INT MATH II 41011208 - 1' (4 units, type 'E'), and 'ENGLISH III 26121308 - 6' (4 units, type 'E'). A red box highlights the dropdown menu for the 'A' type of 'INTEGRATED SCIENCE', showing options 'R', 'E', and 'A' (selected with a green checkmark).

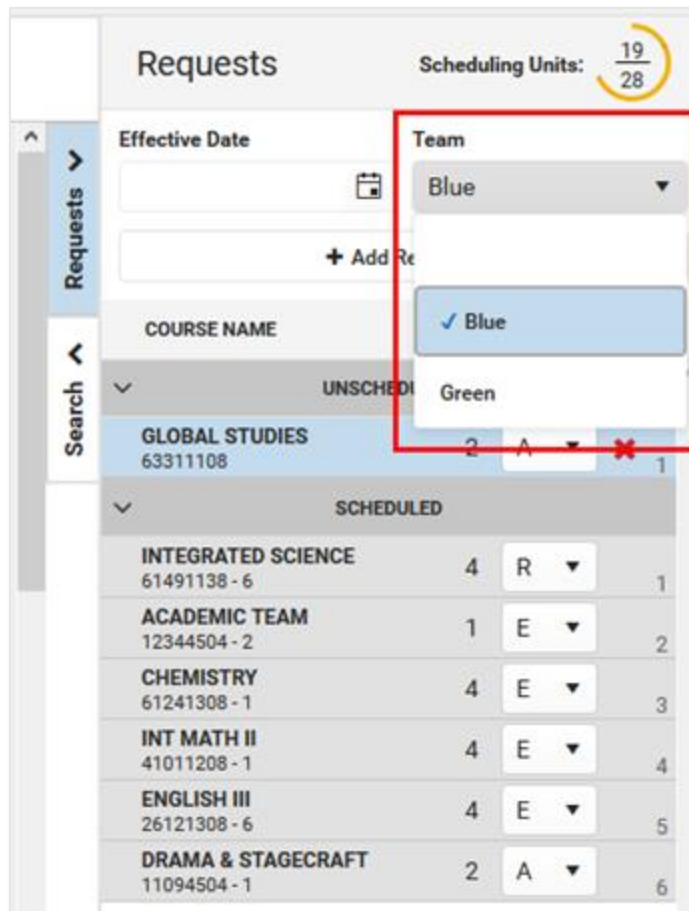
COURSE NAME	UNITS	TYPE	#
<b>UNSCHEDULED</b>			
GLOBAL STUDIES 63311108	2	A	1
<b>SCHEDULED</b>			
DRAMA & STAGECRAFT 11094504 - 1	2	R	1
ACADEMIC TEAM 12344504 - 2	1	E	2
INTEGRATED SCIENCE 61491138 - 6	4	A	3
CHEMISTRY 61241308 - 1	4	E	4
INT MATH II 41011208 - 1	4	E	5
ENGLISH III 26121308 - 6	4	E	6

The number associated with the course request may change. Since required and elective requests are given priority when loading the schedule, a request marked as Required that is in position 1 may change to position 2 if the type is changed to Elective, and it might change to position 5 if the type is changed to Alternate.


## *Assign a Student to a Team*

Teams need to be created in Scheduling Groups to assign a team and for this option to display.

Select the desired Team from the dropdown list. A green checkmark indicates that team is selected. The update is automatically saved. As noted above, a student can only be assigned to one team at any given time, and the student is only scheduled into course sections where that team is assigned.



**Requests** Scheduling Units:  $\frac{19}{28}$

Effective Date  

+ Add Re

COURSE NAME

UNSCHE

GLOBAL STUDIES  
63311108

SCHEDULED

INTEGRATED SCIENCE 61491138 - 6	4	R	1
ACADEMIC TEAM 12344504 - 2	1	E	2
CHEMISTRY 61241308 - 1	4	E	3
INT MATH II 41011208 - 1	4	E	4
ENGLISH III 26121308 - 6	4	E	5
DRAMA & STAGECRAFT 11094504 - 1	2	A	6

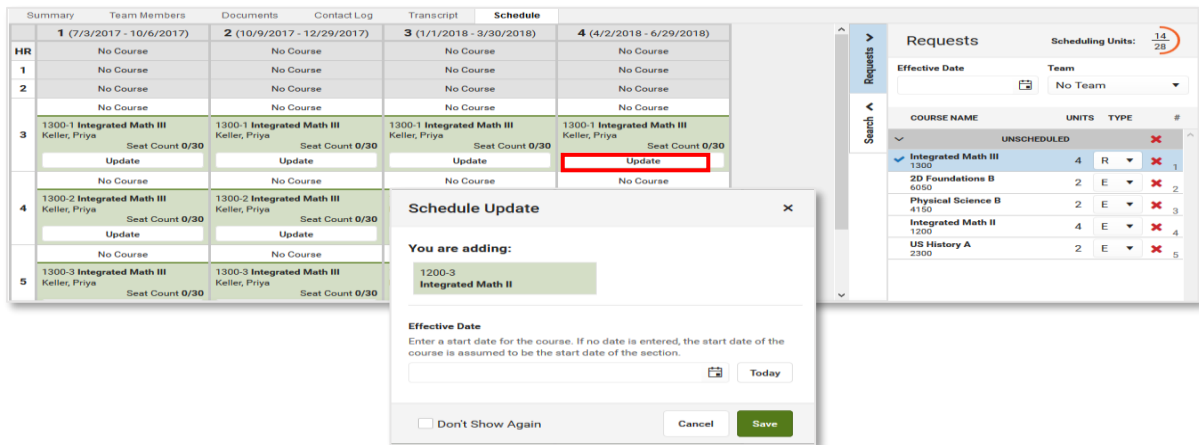
If a student is already scheduled into a course section for one team, and their team changes, those courses need to be manually changed (dropped, rescheduled) to keep the student with the appropriate team.

## Add Requested Courses Using Manual Mode

Course requests can be added to the student's schedule without loading the requests. This is called the Manual Mode, and allows counselors or other staff to schedule an individual course.

## Add Unscheduled Courses

1. Select a course from the list of Unscheduled Courses Request by clicking on it. The course is placed on the schedule in cells highlighted in green. This action also closes the Requests panel.
2. To place the unscheduled course into a period, click the **Select** button on one of the highlighted periods. A pop-up message displays confirming the addition of the course.
3. Enter the Effective Date in *mmdyy* format, or click the calendar icon to choose a date, or click the <Today> button to add the current date as the effective date. This is the date the student **BEGINS** attending the course and is actively scheduled (on the roster) into that course section. The date can also be added to the Request Panel and applied to all added course requests. Entered dates must be within the term dates of when the course meets.
4. Click the **Roster** button on the pop-up message. The course is added into the chosen period and term, and the course request moves to be within the list of Scheduled courses.



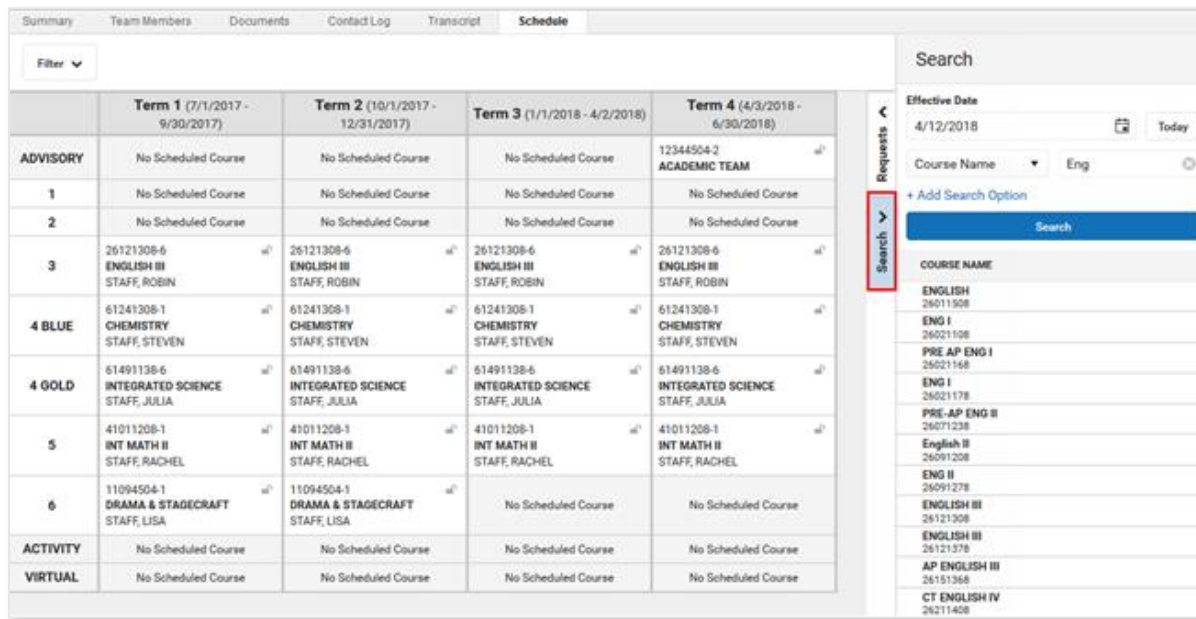
The screenshot displays the Infinite Campus interface. On the left, a 'Summary' tab is active, showing a grid of course sections. The grid has columns for terms: 1 (7/3/2017 - 10/6/2017), 2 (10/9/2017 - 12/29/2017), 3 (1/1/2018 - 3/30/2018), and 4 (4/2/2018 - 6/29/2018). Rows represent periods (HR 1, 2, 3, 4, 5). Period 3, Row 3 is highlighted in green and contains '1300-1 Integrated Math III Keller, Priya' with a 'Seat Count 0/30'. A red box highlights the 'Update' button in this cell. On the right, the 'Requests' panel shows a list of 'UNSCHEDULED' courses: Integrated Math III 1300, 2D Foundations B 6050, Physical Science B 4150, Integrated Math II 1200, and US History A 2300. A 'Schedule Update' pop-up is centered, showing 'You are adding: 1200-3 Integrated Math II'. It includes an 'Effective Date' field with a calendar icon and a 'Today' button. At the bottom are checkboxes for 'Don't Show Again' and buttons for 'Cancel' and 'Save'.

When adding requested courses, the course grid removes extraneous course information in an effort to display the entire schedule without needing to scroll. Depending on the calendar layout (amount of periods, terms, etc.), this may not happen. Currently scheduled courses only list the course name. For periods where there is no course currently scheduled, the words "No Course" display (instead of "No Scheduled Course"). After canceling the selection, or after adding a requested course, the full details of the course return. This also happens when placing a searched for course.



## Search Panel

Use the Search Panel to find specific courses to add to a student's schedule by entering search criteria, or do a full course search by not entering any search criteria (this option is not recommended).



	Term 1 (7/1/2017 - 9/30/2017)	Term 2 (10/1/2017 - 12/31/2017)	Term 3 (1/1/2018 - 4/2/2018)	Term 4 (4/3/2018 - 6/30/2018)
<b>ADVISORY</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	12344504-2 <b>ACADEMIC TEAM</b>
<b>1</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course
<b>2</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course
<b>3</b>	26121308-6 <b>ENGLISH III</b> STAFF, ROBIN	26121308-6 <b>ENGLISH III</b> STAFF, ROBIN	26121308-6 <b>ENGLISH III</b> STAFF, ROBIN	26121308-6 <b>ENGLISH III</b> STAFF, ROBIN
<b>4 BLUE</b>	61241308-1 <b>CHEMISTRY</b> STAFF, STEVEN	61241308-1 <b>CHEMISTRY</b> STAFF, STEVEN	61241308-1 <b>CHEMISTRY</b> STAFF, STEVEN	61241308-1 <b>CHEMISTRY</b> STAFF, STEVEN
<b>4 GOLD</b>	61491138-6 <b>INTEGRATED SCIENCE</b> STAFF, JULIA	61491138-6 <b>INTEGRATED SCIENCE</b> STAFF, JULIA	61491138-6 <b>INTEGRATED SCIENCE</b> STAFF, JULIA	61491138-6 <b>INTEGRATED SCIENCE</b> STAFF, JULIA
<b>5</b>	41011208-1 <b>INT MATH II</b> STAFF, RACHEL	41011208-1 <b>INT MATH II</b> STAFF, RACHEL	41011208-1 <b>INT MATH II</b> STAFF, RACHEL	41011208-1 <b>INT MATH II</b> STAFF, RACHEL
<b>6</b>	11094504-1 <b>DRAMA &amp; STAGECRAFT</b> STAFF, LISA	11094504-1 <b>DRAMA &amp; STAGECRAFT</b> STAFF, LISA	No Scheduled Course	No Scheduled Course
<b>ACTIVITY</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course
<b>VIRTUAL</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course

**Search Panel:**

Effective Date: 4/12/2018

Course Name: Eng

+ Add Search Option

**Search**

**COURSE NAME**

ENGLISH  
26011908

ENG I  
26021108

PRE-AP ENG I  
26021568

ENG I  
26021178

PRE-AP ENG II  
26071238

English II  
26091208

ENG II  
26091278

ENGLISH III  
26121308

ENGLISH III  
26121378

AP ENGLISH III  
26151368

CT ENGLISH IV  
26211408

Search for courses by entering one or more of the following options:

- Course Name (or part of the course name)
- Course Number
- Teacher's last name
- Term in which the course meets
- Period in which the course meets
- Schedule
- Team Name
- Department





Click the **Add Search Option** to add additional search criteria. This adds an additional Search criteria fields. In the example below, the search criteria is currently looking for Course names that begin with "eng" and are scheduled into Term 4. A third option could be added to narrow the results to courses that begin with "eng", scheduled into Term 4, and meet during Period 2.

The screenshot shows the 'Search' panel on the left with 'Requests' and 'Search' tabs. The 'Search' tab is active. The search criteria include: Effective Date (4/12/2018), Course Name (eng), and Term (Term 4). A red box highlights the '+ Add Search Option' button. Below the search criteria is a 'Search' button and a list of results under the heading 'COURSE NAME'. The first result is 'ENGLISH 26011508'.

Click the dropdown arrow next to the search field to change the search option, and select specific values (Terms, Periods, Schedule Names, Department Names). Searching by Course Number, Course Name or Teacher Name requires entry of a value.

This screenshot shows the 'Search' panel with the 'Period' dropdown menu open. The dropdown menu is highlighted with a red box and shows a list of options: 'ADVISORY', '1', '2', and '3'. The 'ADVISORY' option is selected, indicated by a checkmark. The search criteria now include 'Period' (ADVISORY). The results list below shows 'ENGLISH 26011508', 'ENG I 26021108', 'PRE AP ENG I 26021168', and 'ENG I'.

Courses added to the student's schedule from the Search list are added as a Request and are visible on the Requests panel.

## MODIFY STUDENT'S SCHEDULE

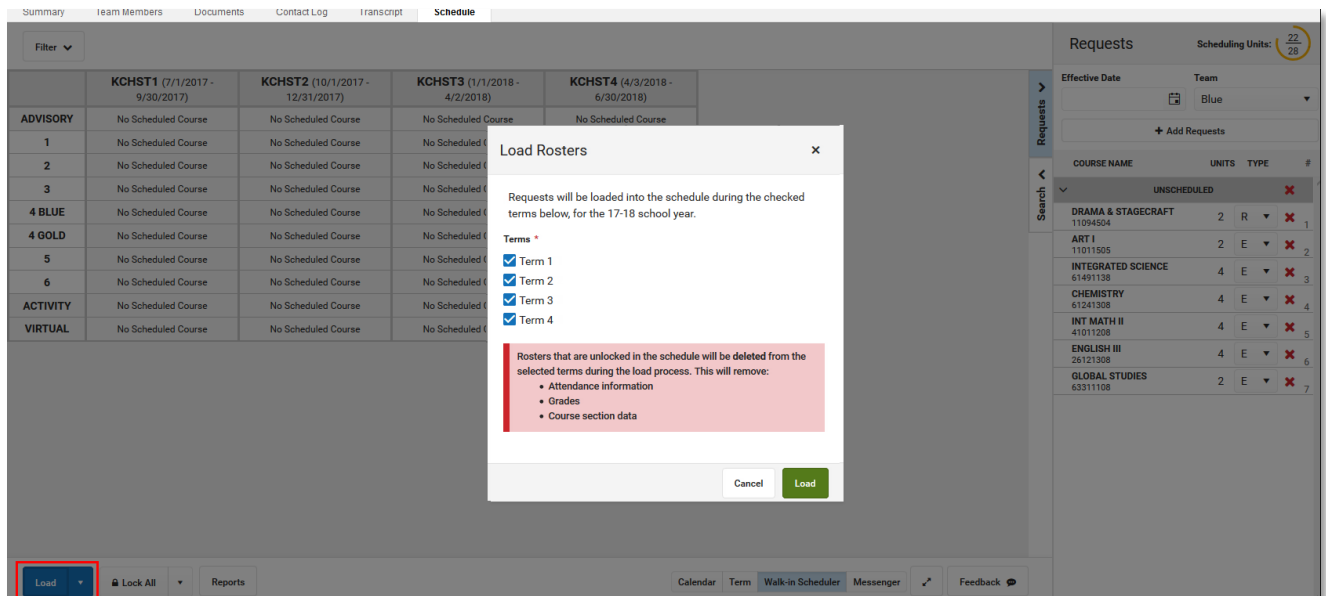
When the Enable Scheduling Validations System Preference is set to Yes, any action/change to the student's schedule that results in a gap in the schedule displays a warning message.

### Load Requests

This process loads courses included in the Requests panel.

1. Choose the **Load** button from the action bar. A **Load Rosters** confirmation message displays.
2. Review the information in the confirmation message, specifically the indication that unlocked courses (rosters) in the schedule are deleted from the selected terms, and with that, any recorded attendance, grades and course section information is also deleted.
3. Click the **Load** button in the confirmation message to continue.

The student's requested courses are added to the schedule.

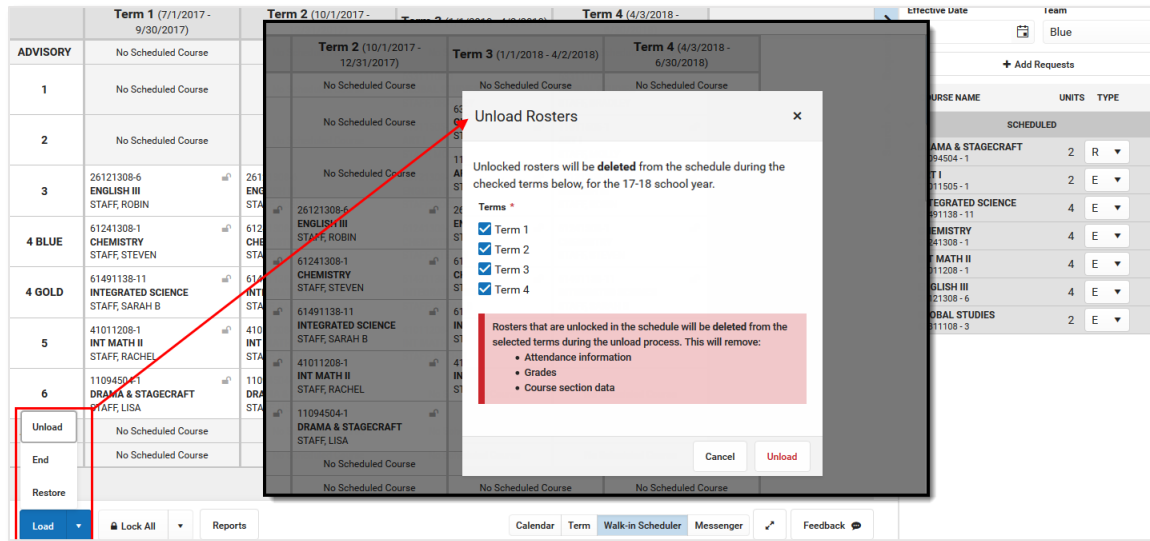


### Unload Requests

1. Click the arrow next to <Load> button and select <Unload>. An Unload Rosters confirmation message displays.
2. Review the information in the confirmation message, specifically the indication that unlocked courses (rosters) in the schedule are deleted from the selected terms, and with that, any recorded attendance, grades and course section information is also deleted.
3. Click the <Unload> button in the confirmation message to continue.

When completed, the student's schedule displays No Scheduled Course for the terms where scheduled courses were unloaded.

Courses in all selected terms (all terms in the calendar are automatically selected) are unloaded (deleted). Remove the checkboxes from the confirmation message to unload courses for specific terms.



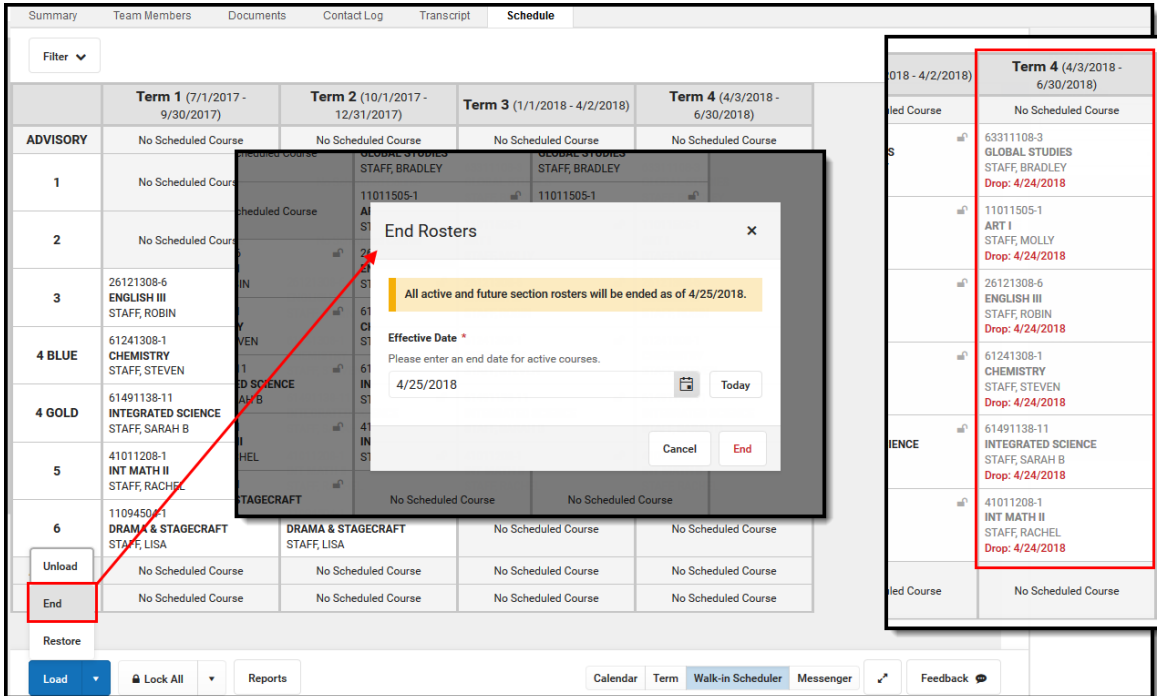
The screenshot displays the Infinite Campus interface. A confirmation dialog titled 'Unload Rosters' is open, showing a list of terms with checkboxes. All terms (Term 1, Term 2, Term 3, and Term 4) are checked. A red box highlights the 'Unload' button in the bottom right corner of the dialog. The background shows a student's schedule for Term 1 (7/1/2017 - 9/30/2017) and Term 2 (10/1/2017 - 12/31/2017), both showing 'No Scheduled Course'.

## End Entire Schedule

This option is used to end the student's schedule as of the entered date when the student is choosing other courses to attend, or needs to rework their schedule for a specific need. This process assumes the student has attendance the current courses for at least one instance (a day, a course meeting, etc.).

1. Click the arrow next to the <Load> button and select <End>. An End Rosters confirmation message displays.
2. Enter the *Effective Date* for the day prior to when the student is no longer attending the course. This date defaults to the current day. Click the <Calendar icon> to choose a different day. For example, if the student is enrolling in new courses on January 15, the entered effective date would be 1/15/2018; the student's enrollment in existing courses is through January 14. This date (1/14/2018) is the Drop date.
3. Click the <End> button in the confirmation message to continue. Entered dates must be within the term dates of when the course meets.

The student's schedule is ended the day prior to the entered date. New courses can be added for the current term and future terms beginning with the entered date, in this example for January 15.

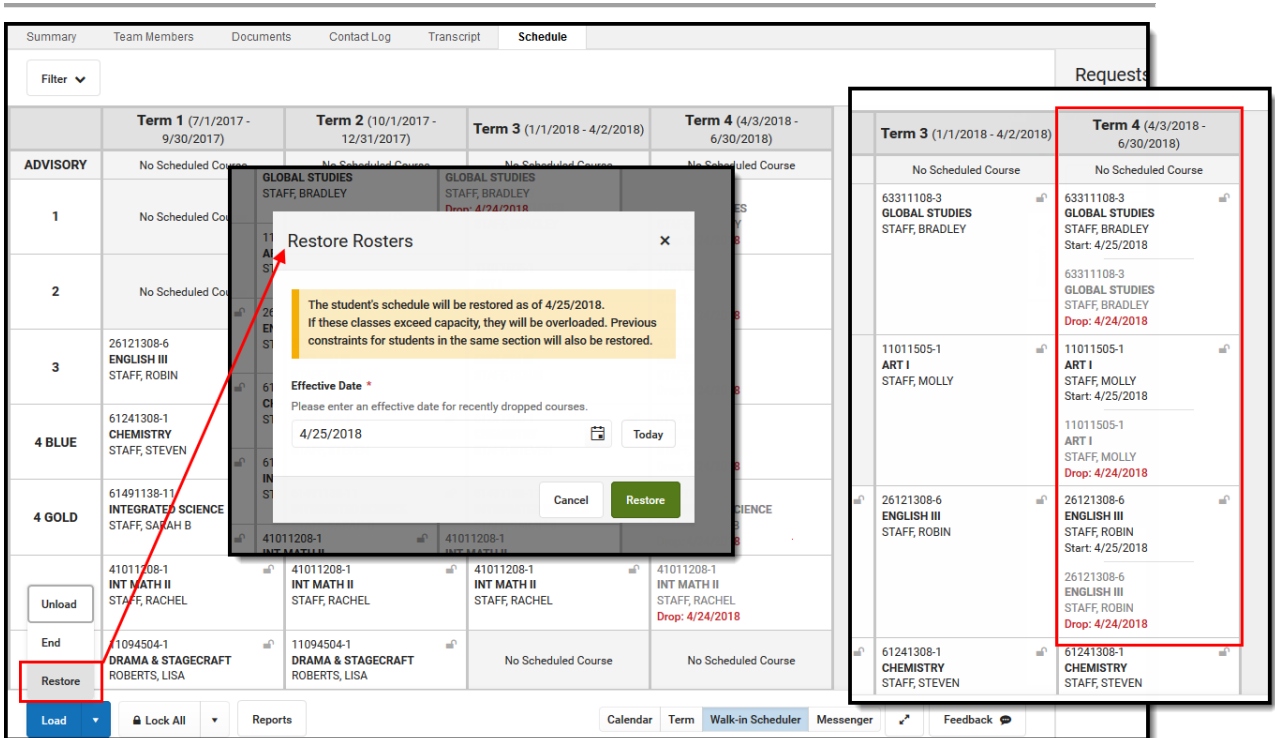


## Restore Entire Schedule

Use this option if the action of ending a student's schedule was done incorrectly, or if a recently dropped course needs to be restored.

1. Click the arrow next to the <Load> button and select <Restore>. A Restore Rosters confirmation message displays.
2. Enter the Effective Date for the day the schedule should be restored. Entered dates must be within the term dates of when the course meets.
3. Click the Restore button in the confirmation message to continue.

The student's schedule is restored as of the entered date. Courses for the term in which the date falls becomes the start date.



Summary Team Members Documents Contact Log Transcript **Schedule** Requests

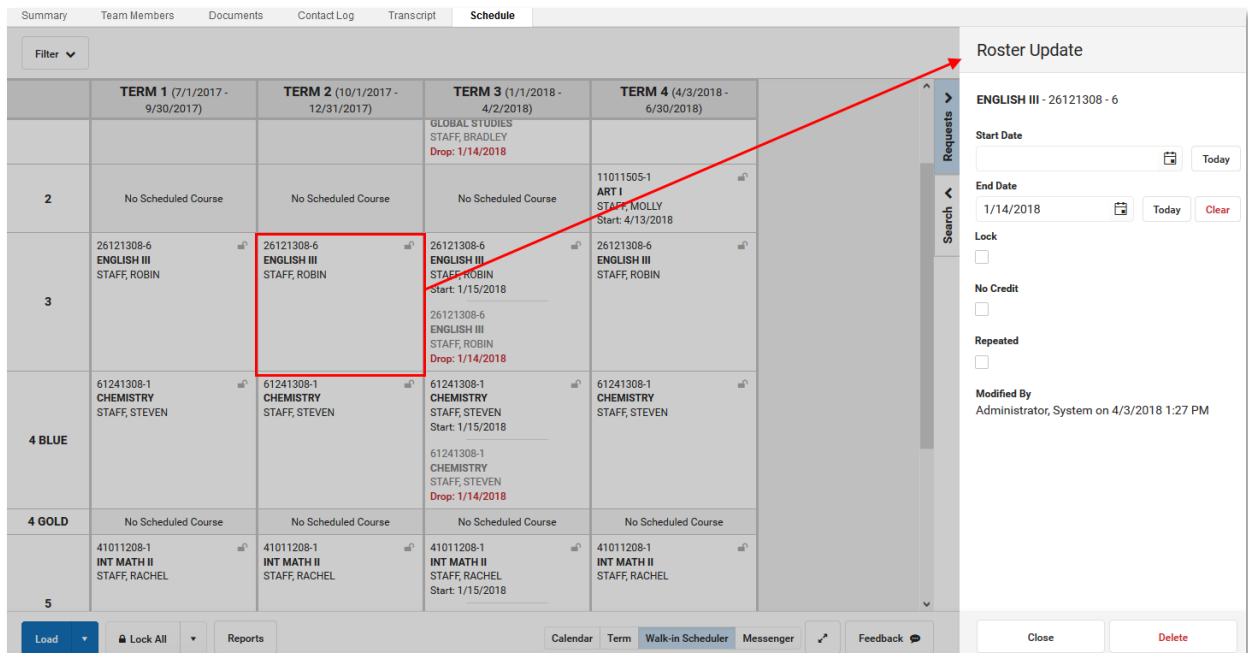
Filter ▾

	Term 1 (7/1/2017 - 9/30/2017)	Term 2 (10/1/2017 - 12/31/2017)	Term 3 (1/1/2018 - 4/2/2018)	Term 4 (4/3/2018 - 6/30/2018)
<b>ADVISORY</b>	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course
1	No Scheduled Course	GLOBAL STUDIES STAFF, BRADLEY	GLOBAL STUDIES STAFF, BRADLEY Drop: 4/24/2018	
2	No Scheduled Course			
3	26121308-6 ENGLISH III STAFF, ROBIN			63311108-3 GLOBAL STUDIES STAFF, BRADLEY Start: 4/25/2018  63311108-3 GLOBAL STUDIES STAFF, BRADLEY Drop: 4/24/2018
4 BLUE	61241308-1 CHEMISTRY STAFF, STEVEN			11011505-1 ART I STAFF, MOLLY Start: 4/25/2018  11011505-1 ART I STAFF, MOLLY Drop: 4/24/2018
4 GOLD	61491138-11 INTEGRATED SCIENCE STAFF, SARAH B			26121308-6 ENGLISH III STAFF, ROBIN Start: 4/25/2018  26121308-6 ENGLISH III STAFF, ROBIN Drop: 4/24/2018
	41011208-1 INT MATH II STAFF, RACHEL	41011208-1 INT MATH II STAFF, RACHEL	41011208-1 INT MATH II STAFF, RACHEL	41011208-1 INT MATH II STAFF, RACHEL Drop: 4/24/2018
End	11094504-1 DRAMA & STAGECRAFT ROBERTS, LISA	11094504-1 DRAMA & STAGECRAFT ROBERTS, LISA	No Scheduled Course	No Scheduled Course
Restore				

Unload Lock All Reports Calendar Term Walk-in Scheduler Messenger Feedback

## MODIFY SECTION ROSTERS IN STUDENT'S SCHEDULE

Changes can be made to existing courses on the student's schedule that affect the Course Section Roster list, and modify the list of students the teacher may see in their class roster. The Roster Update panel displays when existing courses are selected.



Summary Team Members Documents Contact Log Transcript **Schedule** Requests

Filter ▾

	TERM 1 (7/1/2017 - 9/30/2017)	TERM 2 (10/1/2017 - 12/31/2017)	TERM 3 (1/1/2018 - 4/2/2018)	TERM 4 (4/3/2018 - 6/30/2018)
			GLOBAL STUDIES STAFF, BRADLEY Drop: 1/14/2018	
2	No Scheduled Course	No Scheduled Course	No Scheduled Course	11011505-1 ART I STAFF, MOLLY Start: 4/13/2018
3	26121308-6 ENGLISH III STAFF, ROBIN	26121308-6 ENGLISH III STAFF, ROBIN Start: 1/15/2018	26121308-6 ENGLISH III STAFF, ROBIN Start: 1/15/2018  26121308-6 ENGLISH III STAFF, ROBIN Drop: 1/14/2018	26121308-6 ENGLISH III STAFF, ROBIN
4 BLUE	61241308-1 CHEMISTRY STAFF, STEVEN	61241308-1 CHEMISTRY STAFF, STEVEN	61241308-1 CHEMISTRY STAFF, STEVEN Start: 1/15/2018  61241308-1 CHEMISTRY STAFF, STEVEN Drop: 1/14/2018	61241308-1 CHEMISTRY STAFF, STEVEN
4 GOLD	No Scheduled Course	No Scheduled Course	No Scheduled Course	No Scheduled Course
5	41011208-1 INT MATH II STAFF, RACHEL	41011208-1 INT MATH II STAFF, RACHEL	41011208-1 INT MATH II STAFF, RACHEL Start: 1/15/2018	41011208-1 INT MATH II STAFF, RACHEL

Load Lock All Reports Calendar Term Walk-in Scheduler Messenger Feedback

**Roster Update**

ENGLISH III - 26121308 - 6

Start Date: 1/14/2018 Today

End Date: 1/14/2018 Today Clear

Lock ☐

No Credit ☐

Repeated ☐

Modified By: Administrator, System on 4/3/2018 1:27 PM

Close Delete

## ***Roster Update Panel***

This panel may vary by state, as information in these fields may be used for state reporting purposes. See your specific state reporting content for information on those fields.

Item	Description
<b>Course Name</b> <b>Course Number</b> <b>Section Number</b>	Indicates the selected course. The course name displays in bold, followed by the course number and then section number.
<b>Start Date</b>	Indicates the date the student began enrollment in the course. If blank, it is assumed the student began enrollment in the course on the first day of the term.  Entered dates need to be within the selected term dates. Warnings display on the Roster Update panel when dates fall outside of the term for the selected section, outside of the student's enrollment or outside of the calendar dates.
<b>End Date</b>	Indicates the date the student began enrollment in the course. If blank, it is assumed the student is (1) currently enrolled in the course section, and (2) was still enrolled in the section at the end of the term.  Entered dates need to be within the selected term dates. Warnings display on the Roster Update panel when dates fall outside of the term for the selected section, outside of the student's enrollment or outside of the calendar dates.
<b>Lock</b>	When marked, the course section remains on the schedule, even when the Unload option is used to remove all scheduled sections.  This applies when unloading a course from the Walk-In Scheduler or from the Schedule Wizard.
<b>No Credit</b>	When marked, indicates the student received no course credit for the selected course.
<b>Repeated</b>	Indicates the student has taken the course previously. This is a label that is noted on the student's transcript.
<b>Modified By</b>	Lists the last staff person who made changes to the selected course section, along with the date and time.  When a section is deleted from a student's schedule or when an end date is added to a course section on the student's schedule and attendance data is deleted, a record of this action is recorded in the Audit Attendance table.

If you are changing the dates for a course that is scheduled in the fourth term, entered dates can only be within the dates of that term.

---

### ***Add a Start date to a Scheduled Course***

When a student begins enrollment AFTER the start of the term, enter the date the student began attending the course. The start date may be different because the student's enrollment started after the start of the term, or the student switched course sections after the start of the term, or it's a temporary class that doesn't follow the standard term dates.

1. Select the appropriate course from the student's schedule. The **Roster Update** panel opens.
2. Enter the **Start Date** in *mmddyy* format, or use the calendar icon to select a date, or click the **Today** button to enter the current date. To remove the date, click the <Clear> button.
3. Click the <Save> button when finished. The entered start date displays with the course.

Changing start dates may affect assignments that have been entered or historical attendance data.

### ***Add an End Date to a Schedule Course***

When a student ends enrollment in a course (dropping a course, rather than ending enrollment in the school), enter the date the student stopped attending the course.

1. Select the appropriate course from the student's schedule. The **Roster Update** panel opens.
2. Enter the **End Date** in *mmddyy* format, or use the calendar icon to select a date, or click the <Today> button to enter the current date. To remove the date, click the <Clear> button.
3. Click the <Save> button when finished. The entered end date displays with the course as the Drop date.

### ***Delete a Student Completely from a Roster***

Only delete a course completely if the student has NEVER attended any instance of the course.

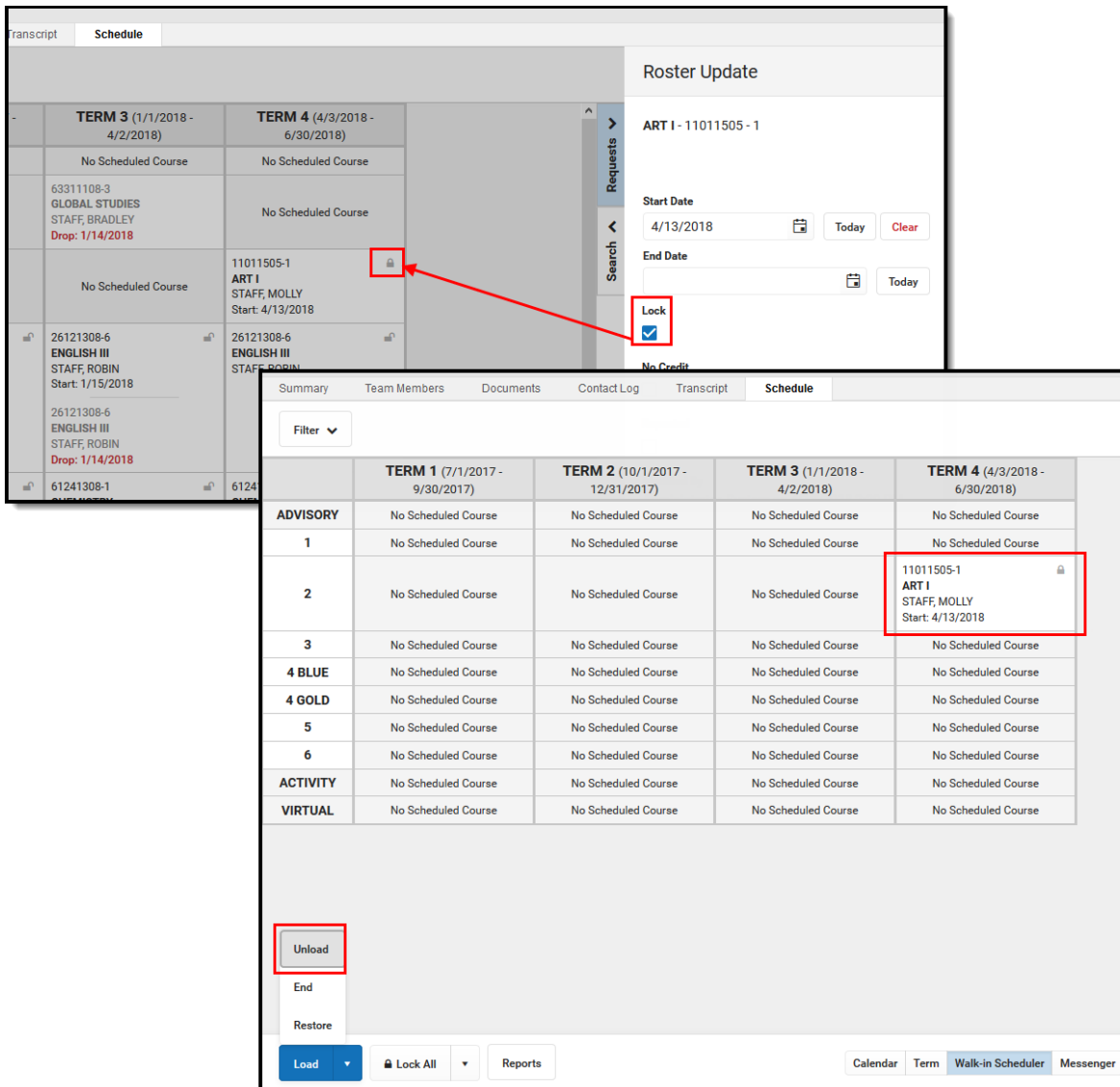
1. Select the appropriate course from the student's schedule. The **Roster Update** panel opens.
2. Click the <Delete> button when finished. A warning message displays indicating that ALL attendance and grading information is removed.
3. Click the <OK> button to continue. The course is removed.

## Lock a Student's Course Selection

1. Select the appropriate course from the student's schedule. The **Roster Update** panel opens.
2. Mark the **Lock** checkbox.
3. Click the **Save** icon. Notice on the Schedule that the course now displays a locked padlock icon.

If the student's schedule is unloaded, this locked course remains in the scheduled period.

To remove the lock, select the course from the schedule, and remove the selection from the Lock checkbox.



The screenshot displays the Infinite Campus interface. On the left, the 'Schedule' tab is active, showing a grid of course selections for TERM 3 and TERM 4. The course '11011505-1 ART I STAFF, MOLLY Start: 4/13/2018' is highlighted with a red box. On the right, the 'Roster Update' panel is open for this course. The 'Lock' checkbox is checked, and a red box highlights it. A red arrow points from this checkbox to the 'Unload' button in the Schedule grid. The 'Unload' button is also highlighted with a red box. Below the 'Unload' button are 'End' and 'Restore' buttons. At the bottom of the interface, there are buttons for 'Load', 'Lock All', 'Reports', 'Calendar', 'Term', 'Walk-in Scheduler', and 'Messenger'.



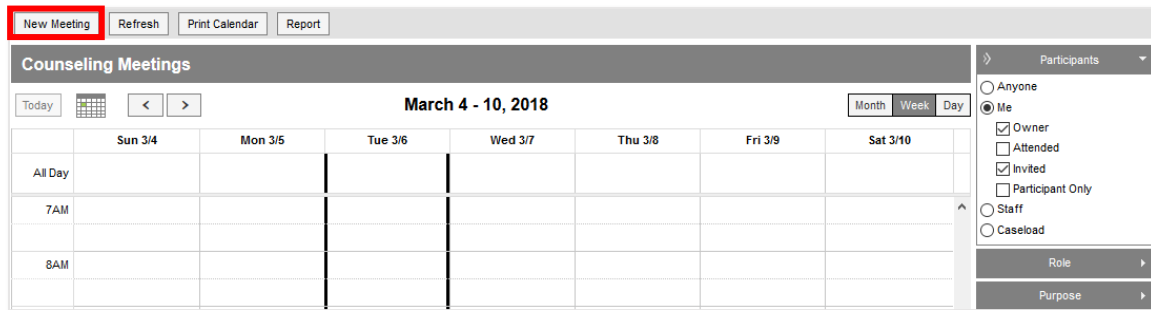
## COUNSELING MEETINGS TOOL

The Meetings tool allows counselors to schedule meetings for students, staff, and others. With this tool counselors can schedule and modify meetings, view their calendar, and send meeting notifications. Users with meetings administrator tool rights can also view other users' meetings.

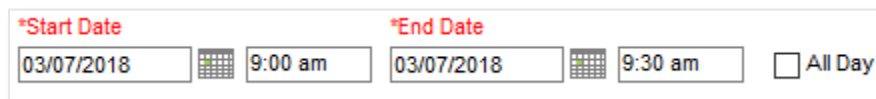
### Creating a Counseling Meeting

*Student Information > Counseling > Meetings*

The Counseling Meetings tool allows counselors to schedule and manage all aspects of a meeting.



1. Click <New Meeting> or the desired meeting time slot on the calendar.
2. Enter the subject of the meeting being scheduled in the Meeting Title dropdown list. The title will be displayed on participants' calendars.
3. Select where the meeting will take place in the Location drop down list.



4. Enter the meeting's start/end dates and times. If the meeting is being scheduled for an entire day, mark the All Day checkbox and enter the appropriate start and end date. The time fields will be removed.
5. If this is a recurring meeting (i.e. weekly or monthly), mark the Recurrence checkbox.
6. Enter the purpose of the meeting to search for the matching predefined purpose of the meeting in the Purpose list. Other checkbox and enter the appropriate information.



<b>Purpose</b>	<b>Other</b>
<input type="text" value="x CST:Child Study Team"/>	<input type="checkbox"/> <input type="text"/>
<b>Meeting Agenda</b>	
<input type="text" value="Discuss concerns regarding a student"/> <input type="text" value="Complete plan for support"/>	

7. If desired, enter the agenda in the Meeting Agenda field.

Add Participants					
Delete All	Name	Role	Invited	Attended	Log Contact
Delete	McGuire, Minnie		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. To add meeting participants, click <Add Participants>. The user creating the meeting will be added as a participant by default.

<b>Participant Search</b>	
Name	<input type="text" value="ab"/>
Filter	<input type="text" value="Select a Filter"/>
Include	<input type="checkbox"/> Students <input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> Other People
<input type="button" value="Search"/>	<input type="button" value="Done"/>

9. Enter the name (or part of a name) of people to include in the filter.

10. If desired, a previously created ad hoc filter may also be selected in the Filter dropdown list. This may be used in conjunction with the Name field. The names that overlap between the two fields will be returned.

11. Select the people to include in the search results, by selecting by marking the checkbox in front of the desired people - Students, Staff or Other People.

12. Click <Search>.

Displaying 60 results. <a href="#">Back to Search</a>					
Add All	Name	Type			
<input type="button" value="Add"/>	Abayare, Tyler L (M) <a href="#">Show: Caseload</a>	Other			
<input type="button" value="Add"/>	Abbernathy, Jordan (M) <a href="#">Show: Caseload</a>	Other			
<input type="button" value="Add"/>	Abbernathy, Peyton (F) <a href="#">Show: Caseload</a>	Other			
<input type="button" value="Add"/>	Abbott III, Ray (M) <a href="#">Show: Caseload</a>	Other			
<input type="button" value="Add"/>	Abbott Jr., Fraser (M)	Other			

Delete All	Name	Role	Invited	Attended	Log Contact
Delete	Abbernathy, Peyton		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete	Abbott Jr., Fraser		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete	Administrator, System		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. People matching the entered search criteria will be displayed. Selecting the person's name will display the Person Summary Report. Selecting one of the Show links will display additional information pertaining to the person (relationships, sections taught, section rosters, team members, caseload, etc.).
14. Click <Add> to select a person. The person will be displayed in the participant list.
15. To search for and selected additional people, click the <Back to Search> link to display the search fields.
16. If a person is selected in error, click <Delete> next to the person's name.

<a href="#">Delete All</a>	Name	Role <input type="text"/>	Invited <input type="checkbox"/>	Attended <input type="checkbox"/>	Log Contact <input type="checkbox"/>
<a href="#">Delete</a>	Abbernathy, Peyton	<input type="text" value="Counselor"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Delete</a>	Abbott Jr., Fraser	<input type="text" value="Social Worker"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Delete</a>	Abra, Dean	<input type="text" value="Classroom Teacher"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Delete</a>	Administrator, System	<input type="text" value="Facilitator"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Delete</a>	Lifellearn, Alan	<input type="text" value="Classroom Teacher"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<a href="#">Delete</a>	Lifellearn, Heather	<input type="text" value="Classroom Teacher"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[Save as Filter...](#)

17. Select <Delete All> to remove all people in the participant list.
18. If desired, select the role participants will have in the meeting. Selecting a role in the Role dropdown list in the header will act as a "fill all" option and assign the role to all participants.
19. All participants will be marked as "invited" by default. To uninvite a participant, uncheck the appropriate Invited checkbox.
20. The attended and Log Contact checkboxes will be completed following the meeting.
21. If desired, the participant list may be saved as a filter for use with ad hoc filters by clicking <Save as Filter>. This is helpful if the meeting is a recurring one.

Outcome <input type="text"/>	Other <input type="checkbox"/> <input type="text"/>
Meeting Minutes <input type="text"/>	

22. The Outcome and Meeting Minutes fields will be completed during/following the meeting.
23. When finished, click Save. A confirmation window will be displayed.



**Save Meeting**

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**Message Preview**

**Family Conference**

Wednesday, March 7, 2018 11:30 AM - 12:00 AM

Location: Principal's Office

Sent by Training Administrator.

**5 affected participants.** [Show](#)

4 people will not receive an email notification.  
2 people will not receive any notifications.

24. The message that will be sent to participants will be displayed for review.
25. The number of participants that will receive the meeting invitation will be displayed in addition to those who won't due to not having an active Campus account.
26. Click the <Show link> to view who and how they will receive the invitation.

**Save Meeting**

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**Message Preview**

**Family Conference**

Wednesday, March 7, 2018 11:30 AM - 12:00 AM

Location: Principal's Office

Sent by Training Administrator.

**5 affected participants.** [Hide](#)

4 people will not receive an email notification.  
2 people will not receive any notifications.

Name	Inbox	Email	Type	Name	Inbox	Email	Type
Administrator, Traini...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I	Dos Santos, Jennifer	<input checked="" type="checkbox"/>		I
Harris, Christopher	<input checked="" type="checkbox"/>		I	Marino, Lindsay			I
Marino, Patricia			I				

**Key:** I = Invitation, U = Update, C = Cancellation



27. When finished, click <Save and Send Notifications>. Clicking <Save> will save the invitation but will not send notifications.

28. The meeting will now be displayed on the calendar.

### Modifying a Meeting

Selecting a meeting from the calendar opens a dialogue box allowing the user to Delete, Edit or Copy meeting information.

### Deleting a Meeting

Selecting the <Delete> option brings up meeting information with options to allow <Show> affected participants <Delete>, or <Delete and Send Notifications>.



### Delete Meeting

#### Message Preview

##### Family Conference

Wednesday, March 7, 2018 9:00 AM - 9:00 AM

Location: Principal's Office

Sent by Training Administrator.

**5 affected participants.** [Show](#)

4 people will not receive an email notification.

2 people will not receive any notifications.

Delete and Send Notifications

Delete

Cancel

### Editing a Meeting

Selecting the meeting and clicking on the <Edit> option brings users to the meeting detail screen where they can edit all details.

Users needing to only change the time and or date may drag meeting to new date and or time while in the calendar view. Pop up window with options to <Save and Send Notifications>, <Save> or <Cancel> changes appears automatically for the drag option and upon <Save> in the detail screen.

### Update Meeting

#### Message Preview

##### Family Conference

Wednesday, March 7, 2018 9:00 AM - 9:00 AM

Location: Principal's Office

Sent by Training Administrator.

**5 affected participants.** [Show](#)

4 people will not receive an email notification.

2 people will not receive any notifications.

Update and Send Notifications

Update

Cancel

## Copy Meeting

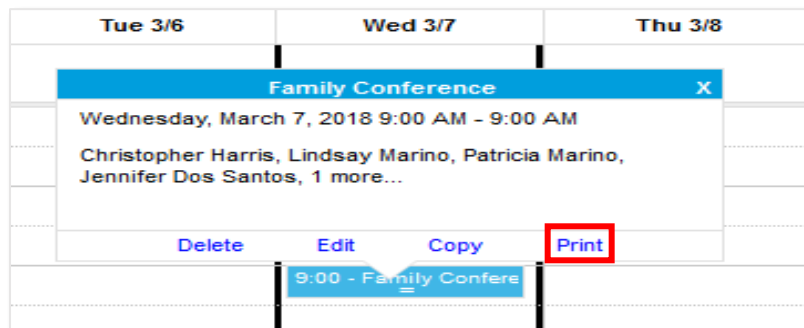
Copy Meeting opens a detail view that is an exact duplicate. Then any changes to date, Time, Participants or reason(s) may be modified. This is good for meetings that do not reoccur on a regular pattern.

## Print Counseling Meetings

*Student Information > Counseling > Meetings*

Print an individual meeting beforehand to take notes, or print afterwards for record-keeping purposes.

1. Click on the meeting in the calendar and then click <Print>.



2. If the user is the owner of the meeting or have meeting administrator tool rights, options display for <Limited Print> or <Full Print>. When <Limited Print> is selected it includes only the date and location of the meeting and a space for taking notes on the Agenda. This format could be useful for distributing to students or mailing to participants who don't have a Portal account or an email address.

Meeting Agenda		Generated on 03/09/2018 09:30:42 AM Page 1 of 1
<b>Family Conference</b>		
<b>Location</b> Principal's Office		
<b>Date &amp; Time</b> Wednesday, March 7, 2018 9:00 AM - 9:00 AM		
<b>Agenda</b>		
Meeting to review 504.		



<Full Print> includes all the information entered for the meeting.

<b>Module:</b> Counseling <b>Owner:</b> Administrator, Training	<b>Meeting Agenda</b>	<b>Generated on</b> 03/09/2018 09:41:59 AM <b>Page</b> 1 of 1
<b>Family Conference</b>		
<b>Location</b> Principal's Office		
<b>Date &amp; Time</b> Wednesday, March 7, 2018 9:00 AM - 9:00 AM		
<b>Purpose</b> Personal/Family Other: _____		
<b>Agenda</b> Meeting to review 504. <div style="border: 1px solid black; height: 100px; margin-top: 5px;"></div>		
<b>Outcome</b> Other: _____		
<b>Meeting Minutes</b> <div style="border: 1px solid black; height: 100px; margin-top: 5px;"></div>		
<b>Participants</b>		
<b>Name</b>	<b>Role</b>	<b>Invited</b> <b>Attended</b>
Administrator, Training		<input checked="" type="checkbox"/> <input type="checkbox"/>
Dos Santos, Jennifer		<input checked="" type="checkbox"/> <input type="checkbox"/>
Harris, Christopher		<input checked="" type="checkbox"/> <input type="checkbox"/>