

## Public Course Requests Procedural Checklist

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The Public Course Requests (PCR) Module in StudentInformation allows students and/or parents to enter course requests on the internet for the 22/23 school year. Requests entered on the public module show immediately in StudentInformation.

The PCR Module is optional.



SYI and Student Promotion/Bulk Enrollment for the 22/23 school year must be completed before any requests can be entered.

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### Change Log

Date	Section Number/Name	Change Description
12/16/21	Entire document	Update to 22/23
4/30/21	Task #2	Add note about Excluded Courses
1/12/21	Entire document	Update to 21/22
7/9/20	Entire document	Review and update
11/18/19	Entire document	Review and update
11/28/18	Entire document	General updates

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## Task #1 - Verify Courses and Course Groups are Setup Correctly to Use in the PCR Module

1. Change the context to the building level in 22/23.
2. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Courses**.
3. Search for a Course and then click the **Edit Pencil** icon to edit the Course.
  - a. The **Display on Public Module** checkbox on the **General** tab determines if the Course appears on the PCR Module for students to request.
  - b. If you would like students to be able to request a Course on the PCR Module then check **Display on Public Module**.
  - c. The **Display on Public Module** checkbox is only used for the PCR Module and does not prevent office staff from assigning a request for a Course that is not marked as **Display on Public Module**.
4. Next, on the **Marks** tab, verify the **Credit Units** value of the Course is correct.
  - a. Since the PCR Module requires a minimum and maximum number of credits be entered when setting up the module, it is important to verify the credit amount on the Course.
5. The PCR Module looks at the **Grade Levels Selected** filter on the **Miscellaneous** tab of the Course. If the grade level selected in the filter matches the student's grade level, the course will display in the PCR Module for the student to select.

**Note:** The selected Grade Levels on the Course loads into GradeBook and are used for setting up Standard Based Report Cards.
6. Finally, on the **Pre/Co-requisites** tab, verify the Pre and Co-requisites are setup.
7. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Groups**.
8. Search for a Course Group then click the **Edit Pencil** icon to edit the Course Group.
  - a. The **Display on Public Module** checkbox on the **Group** tab determines if the Course Group appears on the PCR Module for students to request.
  - b. If you would like students to be able to request a Course Group on the PCR Module then check **Display on Public Module**.
  - c. The **Display on Public Module** checkbox is only used for the PCR Module and does not prevent office staff from assigning a request for a Course Group that is not marked as **Display on Public Module**.
  - d. The **Display Courses Individually** checkbox on the **Group** tab determines whether Courses that are members of this Course Group may be searched for and requested by students in the PCR Module. If

Courses that are in this Course Group should not show individually in the PCR Module, then the **Display Courses Individually** checkbox should be unchecked. This overrides the **Display on Public Module** checkbox on the **Courses – General** tab for the Courses within this Course Group.

## Task #2 - Setup the Application Configuration

The Application Configuration specifies how the PCR Module will function.

1. At the building level in 22/23, navigate to: **StudentInformation**  
» **Management** » **School Administration** » **Public Administration**  
» **Application Configuration**.
2. In the **Context Options** section, ensure the **School Year** dropdown is set to 2022-2023.
3. The first section is called **Security Options**. In the **Student Validation Method** dropdown, choose **None**. The **Student Validation Method** is not functional at this time so if you chose **Student Social Security Number** or **Student Number**, it would not change how the PCR Module functions.
4. Next, the **Guardian Access** dropdown allows you to tell StudentInformation if student contacts marked as Legal Guardian should have access to the PCR Module.
  - a. A majority of schools gather students in a lab during school and the students enter their course requests. The guardians do not have access to the PCR Module since the students enter the requests at school.
  - b. If guardians will not be using the PCR Module, choose **None**.
  - c. The 2nd option in the dropdown is **View Only**.
  - d. Choosing **View Only** allows you the ability to generate logins for guardians and once the guardian is logged into the PCR Module, they can only review requests. Guardians cannot make any changes to requests if **View Only** is selected.
  - e. The 3rd choice in the dropdown is **Modify Requests**.
  - f. Choosing **Modify Requests** allows guardians to log into the PCR Module and add and delete requests for the student, but the student may always go back and undo the changes the guardian made.
  - g. The 4th option is **Modify and lock requests**.
  - h. Choosing **Modify and lock requests** allows guardians to add or delete course requests and lock the requests so the student cannot change them.
  - i. Of course, the office staff still has the ability to override any request the student or guardian puts in the PCR Module.
5. The **Dates of Application Availability** dropdown allows you to tell StudentInformation what date range the PCR Module will be available to students and guardians.
6. The next section named **Course Request Options** allows you to configure which course types students can request on the PCR Module.
7. You can type in a URL in the **External course catalog address** field.
  - a. If entering a URL, you must also check the **Use external course catalog** box.
  - b. If a URL is entered and a student clicks on a Course while in the PCR Module to find out more about the course, they will be directed to the URL listed in the **External course catalog address**.

- c. If you wish to use the Course information in StudentInformation, leave the URL field blank.
8. The next option is **Guardian approval required**.
- a. State Support strongly recommends choosing **None** in this dropdown.
  - b. Choosing **None** will mark all requests as approved after the student submits his requests and does not require any further intervention from the office staff. The requests submitted by the students are immediately ready to be scheduled by the Batch Scheduler.
  - c. Choosing **Electronic** or **Signature** requires the office staff to go to each student and approve their requests one by one. Since the Batch Scheduler only schedules approved requests, the student would not receive a schedule until his or her requests were updated to **Approved** status and then the Batch Scheduler run again.
9. The next option is **Request may specify: Alternate Course**.
- a. This option allows students to choose an alternate course request if the original request is unavailable.
  - b. **Note:** The Batch Scheduler allows you the option to schedule alternate course requests or not. So, just because a student enters an alternate Course does not mean they will be scheduled into the alternate Course if their first choice is not available. It also depends on how the Batch Scheduler is configured.
10. Next, you specify the **Minimum credits required** and the **Maximum credits allowed** a student can request on the PCR Module.
- a. If a student attempts to submit requests that are lower than or exceed the min or max setup in the Application Configuration, the student will receive a warning message and will be required to add or drop requests until the number of course requests falls into the correct range.
  - b. If you wish to use the PCR Module and your school does not use credit values on the Courses, you can configure the application with a minimum of zero credits and a maximum of 10 credits. The min and max credits are required fields.
  - c. At this time, there is no way to control the number of Courses a student can request. You can only control the number of credits.
11. If **Enforce Prerequisites and Corequisites** is checked and a student attempts to add a request that they have not met the prerequisites or corequisites, which are setup on the Pre/Co-requisites tab of the Course found by navigating to: **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Courses**, the student will be warned that they do not meet the pre or co-reqs and will be allowed to continue or prevented from adding the requests depending on what you chose in the **Requisite Action** dropdown.
- a. Choosing **Warn** in the **Requisite Action** dropdown allows the student to add the request even though they have not met the pre or co-reqs.

The student does receive an informational warning, but they are allowed to continue.

- b. If **Prevent** is chosen and a student attempts to request a Course they do not meet the pre or co-reqs for, an error will display and StudentInformation will not allow the student to add the request.
  - c. If **Automatic** is chosen (used with co-requisites only) and a student attempts to request a Course they have not met the co-reqs, the application prompts the user. If the user decides to continue, the application adds or removes the additional requests. If the user decides to cancel, no requests will be added or removed.
  - d. An example of when you would want to choose **Warn** instead of **Prevent** is a student who is requesting to take Spanish1 and Spanish2 in the 22/23 school year. If Spanish2 has a prerequisite of Spanish1 and the **Application Configuration** is set to Prevent, the student will not be allowed to choose Spanish2 since they have not completed the course. This is a good reason to choose **Warn**.
12. The next option is **Permit Completed Courses**.
- a. State Support recommends clicking this box because if the box was unchecked, a student who took Band their 9th grade year would not be allowed to request Band their 10th, 11th, or 12th grade year since Band was completed their 9th grade year.
13. The next option is **Course Types**.
- a. Choose the type of Courses students will be able to choose in the PCR Module by placing a checkmark next to the course type.
  - b. Typically, schools allow students to choose course types of **Class**, **Course Group**, and **College Credit Plus**.
  - c. If you have a Course or Course Group which is included in the course type you have selected, but you do not want students to be able to request it, you can either unmark **Display on Public Module** on the Course or Course Group record or type in the Course or Course Group Codes separated by commas in the field next to **Excluded Courses**.  
**Note:** Do not have any extra spaces in the comma separated list.
14. Finally, the **Request Cut-off Date** field determines the last day students can enter requests.
- a. In the screenshot example following this task, the **Dates of Application Availability** are set to 12/1/2021 to 5/1/2022 and the **Request Cut-off Date** is 4/1/2022. This means the public module is available until 5/1/22, but students can only enter their requests up to and on 4/1/22. If they login on 4/2/22 the student will only be able to view the requests. The student will no longer be allowed to make changes.
15. Click **Save**.

## Student Course Request Application Configuration

From this screen, you can edit the configuration settings for the Student Course Request Application.

### Context Options

School Year: 2022-2023

### Security Options

Student Validation Method: None

Guardian Access: None

Dates of Application Availability: 12/1/2021 - 5/1/2022

### Course Request Options

External course catalog address:   Use external course catalog

Guardian approval required: None

**i** Guardian approval required:

Request may specify:  Alternate Course

None = All requests will be marked as approved status after the student submits the requests.

Minimum credits required: 2.0

Maximum credits allowed: 10.0

Electronic or Signature = The requests will be assigned a pending status. Parents or office staff will have to approve each request one by one.

Enforce Prerequisites and Corequisites:

Requisite Action: Warn

THE BATCH SCHEDULER WILL ONLY SCHEDULE APPROVED REQUESTS.

Permit Completed Courses:

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> C - Class        | <input checked="" type="checkbox"/> SAT - Satellite course    |
| <input type="checkbox"/> L - Lunch                   | <input checked="" type="checkbox"/> CCP - College Credit Plus |
| <input type="checkbox"/> Z - Study hall              | <input type="checkbox"/> Blank - blank - legacy               |
| <input type="checkbox"/> ESC - ESC course            | <input checked="" type="checkbox"/> VOC - Vocational          |
| <input checked="" type="checkbox"/> G - Course Group | <input type="checkbox"/> CaseMgt - Case Management            |
| <input type="checkbox"/> S - Spare                   | <input checked="" type="checkbox"/> OL - Online               |

Course Types:

Excluded Courses:

Request Cut-off Date: 4/1/2022

Save

Cancel



## Task #3 - Generate Student and/or Guardian Accounts and Print Username and Password Letters

### Step 1: Generate accounts.

1. At the building level in 22/23, navigate to: **StudentInformation**  
» **Management** » **School Administration** » **Public Administration**  
» **Account Generation**.
2. The first section is named **Account Generation Details**.
3. The **Account Type** dropdown allows you to tell StudentInformation whose accounts you want to generate usernames and passwords for.
  - a. If you only want to generate usernames and passwords for students, choose **Student Only**.
  - b. If you only want to generate usernames and passwords for guardians only, choose **Guardian Only**.
  - c. If you want to generate usernames and passwords for both students and guardians, choose **Student and Guardian**.
4. The next dropdown is **Account Lifespan**.
  - a. State Support recommends choosing **Date Limited** which means the username and password generated by StudentInformation will be good for the date range selected.
  - b. If you choose **Permanent**, it means the student will have the same username and password for every year unless you reset the accounts in later years. The likelihood of a student remembering his username and password from year to year is very slim. For that reason, we recommend you use **Date Limited**.
5. In the **Date Range** filters, use the same dates you used for the **Dates of Application Availability** you setup in the previous task.
  - a. In the example screenshot following this task, the Date Range is 12/1/21 – 5/1/22.
6. In the **Existing Accounts** dropdown, the options are **Ignore**, **Reset** and **Reinitialize**. Choosing **Ignore** leaves existing accounts as they are and does not change any account properties. Choosing **Reset** will replace any existing accounts with a new username and password. Choosing **Reinitialize** will reinitialize any existing accounts with a new Account Lifespan keeping the same username and password. State support recommends to **Reset** the existing accounts.
7. Use the **Student Selection** section to choose which students to generate accounts for.
  - a. Click **Preview Students**.
  - b. The students appear on the screen based on your selection criteria.
  - c. Uncheck the students you do not want to generate accounts for and click **Create Accounts**.
8. Now, we are ready to print username and passwords.

## Step 2: Print account letters.

9. Navigate to: **StudentInformation** » **Management** » **School Administration** » **Public Administration** » **Account Information Letter**.
  - a. Using the **Selection Criteria** filters, choose which students you want to print username and password letters for. It is usually the same filters used to generate the accounts.
  - b. Usernames and passwords are case-sensitive, and the last four characters of the username and the entire password contain only the numbers 0-9 and the letters A-F. The last four characters of the username and the entire password does not contain the letter O, only the number 0.
  - c. You can enter up to 600 characters as **Letter Verbiage** to appear on all Account Information letters.  
**Note:** If you include the Public Module URL in the Letter Verbiage section, the students would have this for their convenience during the entering Course Requests process.
  - d. Click **Submit**.
  - e. A job named **Account Information Letter** has been sent to your Management screen.
  - f. Wait for the job to finish and print out the username and password letters.

### Account Generation

**Account Generation Details**

Account Type: Student Only ▼

Account Lifespan: Date Limited ▼

Date Range: \* 12/01/2021 📅 to \* 05/01/2022 📅

Existing Accounts: Reset ▼

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**Student Selection**

Search Mode:  Student Search  Specify Username  Specify Student Number

Last Name:   Perform wildcard search

First Name:   Perform wildcard search

Gender:  Male  Female  Unspecified

Homeroom Date: 12/16/2021 📅

**Student Status**

A - ACTIVE RES  
 GO - Grad Only  
 H - Homeschool  
 I - INACTIVE

Exclude students with selected status(es)

**Administrative Homeroom**

C103 - JOSEPH (Full Year Term)  
 C103 - JOSEPH (Semester 1)  
 C103 - JOSEPH (Semester 2)  
 C105 - WHITEHEAD (Semester 1)

Exclude students in selected homeroom(s)

**Grade**

PS - PS  
 KG - KG  
 01 - 01  
 02 - 02

Exclude students in selected grade level(s)

**Membership Group**

11 - Intervention  
 12 - Post-secondary Enrollment Options Program  
 15 - Academic Intervention/RIMP  
 16 - Placement in Chartered NonPub or Private Sch

Exclude students in selected group(s)

**Membership**

50 - Prev. reported as a dropout in reporting district  
 50 - Previously reported as a dropout in another Oh  
 Academic Intervention/RIMP - Exp. Interv. in Phone  
 Academic Intervention/RIMP - Exp. Interv. in Sight V

Exclude students in selected membership(s)

**Program**

\*\* - NOT APPLICABLE  
 01 - MULTIPLE DISABILITIES  
 02 - DEAF-BLINDNESS  
 03 - HEARING IMPAIRMENTS

Exclude students in selected program(s)

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Preview Students

## Account Information Letter

From this screen, you can select parameters to generate a report.

Selection Criteria	Selection Summary	Load Settings
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Search Mode:  Student Search  Specify User Name  Specify Student Number

Last Name:   Perform wildcard search

First Name:   Perform wildcard search

Gender:  Male  Female  Unspecified

Administrative Homeroom

C103 - JOSEPH (Full Year Term)	
C103 - JOSEPH (Semester 1)	
C103 - JOSEPH (Semester 2)	
C105 - WHITEHEAD (Semester 1)	

Exclude students in selected homeroom(s)

Grade

PS - PS	
KG - KG	
01 - 01	
02 - 02	

Exclude students in selected grade level(s)

Membership Group

11 - Intervention	
12 - Post-secondary Enrollment Options Program	
15 - Academic Intervention/RIMP	
16 - Placement in Chartered NonPub or Private Sch	

Exclude students in selected group(s)

Membership

50 - Prev. reported as a dropout in reporting district	
50 - Previously reported as a dropout in another Oh	
Academic Intervention/RIMP - Exp. Interv. in Phone	
Academic Intervention/RIMP - Exp. Interv. in Sight v	

Exclude students in selected membership(s)

Program

** - NOT APPLICABLE	
01 - MULTIPLE DISABILITIES	
02 - DEAF-BLINDNESS	
03 - HEARING IMPAIRMENTS	

Exclude students in selected program(s)

Homeroom Date: \*

Letter Types To Generate:

Letter Verbiage:

Sorting Options

Grade (ASC)	Grade (DESC)
Student Number (ASC)	Student Last Name (ASC)
Student Number (DESC)	
Student Last Name (DESC)	

Delivery Method:

Email Address:

Report Format:

Description:

## Task #4 - Students and/or Guardians Enter Requests on the PCR Module


1. With their username and password letter in hand, have the students login to your Public Module URL.
  - a. It is helpful to have the Public Module URL printed on the student's username and password letters.
2. They will be prompted for their **Username** and **Password**.
3. Click **Log In**.
4. Any request already entered in StudentInformation by the office staff will display at the top with locks and students will not be allowed to edit the request.
5. Students can use the **Course Search** or **Specify Course Code** to enter requests. Requests can be entered for Courses and Course Groups.
  - a. You can add a request by clicking on the plus sign next to the Course Code or checking the box next to the plus sign.
  - b. If the student decides to use the checkbox, the requests are not added until the student clicks **Request Selected Courses**.
  - c. If you use the plus button, the request will be added immediately.
  - d. Remember only those Courses marked as **Display on Public Module**, are the correct **Course Type**, and match the students **Grade Level** will show when the student searches for courses in the PCR Module. Also, if **Permit Completed Courses** was checked on the **Application Configuration**, check the **Include Completed Courses** during the **Course Search**. They will show in the list of available courses with a red background to distinguish them.
  - e. Notice a request added by a student has a Status of **Student Pending**.
  - f. Again, any request entered in StudentInformation by the office staff will be locked and have a Status of **Approved**.
6. Once a student has entered their requests, they need to click **Review Requests**.
7. If the student's requests do not meet **Minimum credits required** or **Maximum credits allowed** that was setup on **Application Configuration**, the student will not be allowed to submit his requests. The student will receive an error message letting them know they have not met the min or max credit requirements.
  - a. They will need to click **Cancel** and enter more requests or delete requests.
8. If the student has met the min and max credit requirements, a **Submit Requests** button will appear on the screen.
  - a. The **Submit Requests** button is very important. Until the student clicks **Submit Requests**, their requests entered on the PCR Module are **Pending Status** and will not be scheduled by the Batch Scheduler in

StudentInformation. Once a student clicks **Submit Requests**, the **Status** of the requests is changed to **Approved**.

- b. Once a student has clicked **Submit Requests**, they can no longer add or edit requests. They can only login and view their selections.
- c. A student also has the option of clicking on **My Account** where they can **Change My Password**.

## Task #5 - Verify Each Student Who Has Entered Requests on the PCR Module Has Approved Their Requests

1. Requests entered on the PCR Module have a **Status** of **Pending** until the student clicks **Submit Requests** at which time the **Status** changes to **Approved**. The Batch Scheduler in StudentInformation will not schedule pending requests. This is why it is very important for students to approve their requests by clicking **Submit Requests** before exiting the PCR Module.
2. To find out which students have zero requests, go to the following page: **StudentInformation** » **Management** » **School Administration** » **Public Administration** » **Uncommitted Requests**.
  - a. Click the **Show Students without Requests** radio button which is located near the bottom of the screen and click **Search**.
  - b. Each student who has zero requests will display.
  - c. You can click on the blue link and you will be brought to their **Student Requests** page.
  - d. Another option on the **Uncommitted Requests** page is to see which students have Unapproved requests by Parent/Guardian. You would only need to use this option if you chose **Guardian Approval = Electronic** or **Signature** when you setup the **Application Configuration**.
  - e. The final option on the **Uncommitted Requests** page is **Uncommitted by Student**.
  - f. This option allows you to find students who entered requests on the PCR Module, but have not clicked **Submit Requests** yet.
3. Another way to find students who have entered requests on the PCR Module, but have not clicked **Submit Requests** yet is to run the R701 with the following parameters chosen:

Suppress Requests That Have No Matching Assignment:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Position For Requests That Have No Matching Assignment:	Before ▼
Suppress Results That Have No Assignment:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Position Of Results That Have No Assignment:	Before ▼
Print Only Schedules With Results That Have No Assignment:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Print Schedules Changed After Date:	<input type="text"/> 

4. If you find students who have forgotten to click **Submit Requests**, the student can log back in and click **Submit Requests** or the office staff can login and click **Submit Requests** for the student or the office staff can edit each request in StudentInformation and check the **Approved** box and **Save**.

5. The Account Usage page found by navigating to: **StudentInformation**  
» **Management** » **School Administration** » **Public Administration**  
» **Account Usage** displays the usage statistics for a selected group of Public Course Request application users based on the filter criteria, or if a student is in context, it will display usage statistics for all users associated with that student.