

Schedule Changes Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
04/28/20	Entire doc	Removed screenshots, updated formatting

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If you are working in a future school year and the schedule is not finalized, you will be required to select a schedule and schedule result when performing the following scenarios.

The remove function will be the only option enabled when dropping a course if school has not started. Once the first day of school arrives, the drop, remove, and transfer functions will all be enabled for course sections that are in progress. If the course term has not started yet, the transfer function will be disabled on the course section.



Scenario 1: Add a class to a student's schedule using the Course Section Assignments page

1. Navigate to **StudentInformation** » **SIS** » **Scheduling** » **Course Section Assignments** in the current school year.
2. Put a student in context.
3. Click **Add Course Assignment**.
4. The page refreshes.
5. In the **Course/Section** fields, enter the course and section number.
6. If you do not know the course and or section number, use the **Ellipse** icon.
7. If you clicked on the **Ellipse** icon, a new window pops up that shows each section of the course and the capacity and filling count.
8. Click on the blue link for the section number and the section number will be automatically filled in for you.
9. The **Assignment Start Date** field defaults to the first day of the course term if the course term has not started. If the term is already in session, the date will default to today's date.
10. In the following screenshot the **Assignment Start Date** defaulted to the first day of school. 116-22 is actually a 2nd Semester only course. When the assignment is saved, StudentInformation automatically corrects the start date to be the 1st day of 2nd Semester.
11. Leave the **Assignment Stop Date** field empty.
12. Click **Save**.
13. The page refreshes and the following message is displayed, **The Course Section Assignments was marked to be saved. Click the save changes button to commit to the database.**
14. Click **Save Changes** again to commit the changes to the database.
15. If click **Save Changes** is not clicked, the course section will not be assigned.
16. The page refreshes.
17. Notice the **Start Date** says the correct date which is the 1st day of the 2nd semester even though today's date or the first day of school was used.
18. Another item to note is the **Type** says **Manual**. This means the course section assignment was added by hand by the office staff versus being scheduled by the Batch Scheduler. (Assignments made by the Batch Scheduler have a **Type** of **Batch**.)
19. The manual assignment will not show on the **Requests** page because the assignment did not originate from a request. The **Requests** page only shows requests.

Scenario 2: Add a class to a student's schedule using the Request Assignments page

1. Navigate to [StudentInformation](#) » [SIS](#) » [Student](#) » [Student Schedule](#) » [Request Assignments](#).
2. Click **Add Assignment**.
3. The right side of the screen refreshes.
4. In the **Choose Course/Group (required) and Section (optional)** field, enter the course section number or use the **Ellipse** icon to select the course section.
5. Click **Next** or hit the **Tab** key on the keyboard.
6. All sections of the course will appear.
7. Click the **Assign** button of the section you would like to assign to the student.
8. The right side of the screen refreshes again.
9. The **Course/Section** fields are grayed out – which is correct since we selected which section we wanted by clicking Assign in the previous step.
10. If you selected the wrong course section, click **Cancel**.
11. The **Assignment Start Date** field always defaults to the first day of the course term.
12. Click **Save Assignment**.
13. Notice there is no corresponding request on the same line for this course section assignment. This means the course was entered manually and did not originate from a request.

NOTE: The Student Requests & Assignments page also has the Run Scheduler and Schedule Study Halls options. These options enable student scheduling from this screen.


Scenario 3: Run the Single Student Scheduler for a student


Running the Single Student Scheduler (SSS) requires a Job Parameter be set up. Please see the Batch Scheduler Step by Step for instructions on setting up the SSS.


1. Change your context to the building level and the school year you are working with.
2. Navigate to [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Requests](#) or [StudentInformation](#) > [SIS](#) > [Student](#) > [Student Schedule](#) > [Request Assignments](#)
 - a. Select a **Working Schedule** and **Result** from the dropdowns if the schedule hasn't been finalized. Click **Reload Screen**.
3. Next, click **Run Scheduler**.
4. Depending on the parameters defined on the SSS Job Parameter, previously scheduled course section assignments, that originated from a request will be undone and rescheduled, sometimes into a different section or no section at all. Please see the Batch Scheduler Step by Step for detailed explanations of the SSS's features.
5. The following message will display, **The Single Student scheduler has completed successfully**.
6. Click **Save Changes**.



Scenario 4: Run the Single Student Study Hall Wizard for a student

 Running the Study Hall Wizard for a single student requires the Study Hall Wizard parameter page be filled out. Regardless, if you are running the Study Hall Wizard for a single student or for the entire school, the Wizard uses the same parameters. Please see the Batch Scheduler Step by Step for instructions on setting up the Study Hall Wizard.

 The Study Hall Wizard will only schedule students into study halls if they have an Overall Student Status of Active and they must have at least one course request.

 Student must have at least one course request or course section assignment to be scheduled into study halls by the Study Hall Wizard.

1. Put a student in context at the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **SIS** » **Scheduling** » **Course Section Assignments**.
 - a. Select a **Working Schedule** and **Result** from the dropdowns if the schedule hasn't been finalized. Click **Reload Screen**.
3. Next, click **Schedule Study Halls**.
4. The Study Hall Wizard will fill in the student's schedule with available study halls.
5. The following message will display, **The single student scheduler for Study Halls has completed successfully**.
6. Click **Save Changes**.

Scenario 5: Bulk add a class to 20 students

1. Change your context to the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **SIS** » **Scheduling** » **Bulk Assign**.
3. Select a **Working Schedule** and **Result** from the dropdowns if the schedule hasn't been finalized.
 - a. Click **Reload Screen**.
 - b. In the **Create a list of students** section filter on which students you'd like to bulk assign the course section to.
 - c. Click **Create New List**.
 - d. Click **Next** to advance to the 2nd tab.
 - e. Enter the course section or course group section or use the **Ellipse** to select the course group or section. Click **Add Section**.
 - f. Note: You can add more than one course section or group section.
 - g. Click **Next** to move to the third tab.
 - h. The **Assignment date** field will default to today's date if the course term has already started and the first day of the term if it hasn't started yet.
 - i. Click **Assign**.
 - j. The page will refresh and if any conflicts exist they will display in the grid.
 - k. Put a check in the box next to the students you wish to create a scheduling conflict for or click **Return** to go back to the Assignment Start Date tab.
 - l. Click **OK**
 - m. The following message will appear: **Assignments were successfully saved**.
 - n. If you don't have the Extra Systems Security to create conflicts for students you will only have the **Return** option and you will be forced to remove the students from your list of students or pick different classes that don't conflict with the student(s).

Scenario 6: Drop a class from a student's schedule using the Course Section Assignments page

1. With a student in context, navigate to **StudentInformation** » **SIS** » **Scheduling** » **Course Section Assignments**.
2. Click on the **trash can** next to the assignment needing removed.
3. Choose the **Drop** option.
4. Enter the last day that the student attended the class.
5. Click **Save**.
6. The following message will display: **Assignment Saved**
7. NOTE: If performing the drop using the Course Section Assignments (CSA) page don't forget to click **Save** twice.
8. The course should display on the CSA page when **Status: Dropped** is marked.
9. The marks associated with the course should display on the Student Marks page with a yellow background.
10. Any period attendance entered for the course section will remain.

Scenario 7: Drop a class from a student's schedule using the Request Assignments page

1. Navigate to [StudentInformation](#) » [SIS](#) » [Student](#) » [Student Schedule](#) » [Request Assignments](#).
2. Click on the **trash can** icon of the section.
3. The right side of the screen refreshes.
4. Enter the student's last day in the course section in the **Stop** field.
5. The **Drop** function is selected by default.
6. Click **Save**.
7. The following message is displayed: Assignment Saved.
8. Uncheck **Show Active Only** checkbox.
9. The dropped course now displays.

Scenario 8: Remove a class from a student's schedule using the Course Section Assignments page

1. With a student in context navigate to [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Course Section Assignments](#).
2. Click on the **trash can** next to the assignment needing removed.
3. Choose the **Remove/Delete** option.
4. Click **Save**.
5. The following message will display: **Assignment Saved**.
6. NOTE: If performing the remove using the Course Section Assignments page don't forget to click **Save** twice.
7. The course should display with two locks on the CSA page when **Status: Removed** is marked.
8. Any marks or period attendance associated with removed class have been hard deleted.

Scenario 9: Remove a class from a student's schedule using the Request Assignments page

1. Navigate to [StudentInformation](#) » [SIS](#) » [Student](#) » [Student Schedule](#) » [Request Assignments](#).
2. Click on the **Trash Can** icon of the section.
3. The right side of the screen refreshes.
4. Select the **Remove / Delete** option.
5. Click **Save**.
6. The following message appears: **Assignment Saved**
7. NOTE: Removed courses are not visible on the Request Assignments page.

Scenario 10: Transfer a student from one class to another using Transfer – Drop option on the Course Section Assignments page or Request Assignments page

1. With a student in context navigate to [StudentInformation](#) » [SIS](#) » [Student](#) » [Student Schedule](#) » [Request Assignments](#) or [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Course Section Assignments](#).
2. Click on the **Trash Can** icon next to the assignment the student will transfer out of.
3. Choose the **Transfer** option and enter the course section the student will transfer into.
4. The new section must be the same course term and course type as the course section the student is transferring out of.
5. Next, select the **Drop** option.
6. The **Stop** date field is enabled, enter the last day the student was physically in the class.
7. The new section the student is moving to will have a start date of the next school day.
8. Click **Save**.
9. NOTE: If performing the remove using the Course Section Assignments (CSA) page, don't forget to click **Save** twice.
10. The new class will display on the CSA or Request Assignments (RA) page and the class the student transferred out of will display as a drop.
11. Any marks or period attendance associated with the original course have been transferred to the new class.

Scenario 11: Transfer a student from one class to another using Transfer – Remove option on the Course Section Assignments page or Request Assignments page

1. With a student in context navigate to [StudentInformation](#) » [SIS](#) » [Student](#) » [Student Schedule](#) » [Request Assignments](#) or [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Course Section Assignments](#).
2. Click on the **Trash Can** icon next to the assignment the student will transfer out of.
3. Choose the **Transfer** option and enter the course section the student will transfer into.
4. The new section must be the same course term and course type as the course section the student is transferring out of.
5. Next, select the **Remove** option.
6. The new section the student is moving to will have a start date equivalent to the start date of the section the student transferred out of.
7. Click **Save**.
8. NOTE: If performing the remove using the Course Section Assignments (CSA) page, don't forget to click **Save** twice.
9. The new class will display on the CSA or Request Assignments (RA) page and the class the student transferred out of will display as a remove with locks.
10. Any marks or period attendance associated with the original course have been transferred to the new class.

Scenario 12: Bulk drop 10 students from the same class

1. Navigate to [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Bulk Course Section Management](#).
2. On the **Choose Section** tab, enter the course section and click **View**.
3. Click the **trash can** next to any student whom shouldn't be removed from the course section.
4. Click **Next** to move to the 2nd tab named **Choose Action**.
5. Select **Drop** and enter a **Stop** date, which would be the last day the students attended the class.
6. Click **Next**.
7. Now, finish the transaction by clicking **Submit**.
8. The following message will display: **Drop was successful**.
9. The course should display on the CSA page when **Status: Dropped** is marked.
10. The marks associated with the course should display on the Student Marks page with a yellow background.
11. Any period attendance entered for the course section will remain.

Scenario 13: Bulk remove 5 students from the same class

1. Navigate to [StudentInformation](#) » [SIS](#) » [Scheduling](#) » [Bulk Course Section Management](#).
2. On the **Choose Section** tab, enter the course section and click **View**.
3. Click the **trash can** next to any student whom shouldn't be removed from the course section.
4. Click **Next** to move to the 2nd tab named **Choose Action**.
5. Choose the **Remove/Delete** option.
6. Click **Next**.
7. Now, finish the transaction by clicking **Submit**.
8. The following message will display: **Remove was successful**.
9. The course should display with two locks on the CSA page when **Status: Removed** is marked.
10. Any marks or period attendance associated with removed class have been permanently deleted.

Scenario 14: Bulk transfer 9 students from one class to another using the Transfer – Drop option

1. Navigate to **StudentInformation** » **SIS** » **Scheduling** » **Bulk Course Section Management**.
2. On the **Choose Section** tab, enter the course section and click **View**.
3. Click the **Trash Can** next to any student whom shouldn't be transferred from the course section.
4. Click **Next** to move to the 2nd tab named **Choose Action**.
5. Choose the **Transfer** option.
6. The new section must be the same course term & course type as the course section the student is transferring out of.
7. Next, select the **Drop** option.
8. The **Stop date** field is enabled, enter the last day the students were physically in the class.
9. The new section the students are moving to will have a start date of the next school day.
10. Click **Next** to move to the 3rd tab named **View conflicts**.
11. Students who will have a scheduling conflict as a result of being transferred into the new course will display in the grid.
12. Click the **Trash Can** next to any student whom shouldn't be transferred into the new course section.
13. Click **Next** to move to the final tab named **Summary**.
14. Now finish the transaction by clicking **Submit**.
15. The following message will display: **Transfer was successful**.
16. The course the students transferred out of will display with a pencil on the CSA or RA page.
17. Any marks or period attendance associated with old class have been transferred to the new course.

Scenario 15: Bulk transfer 9 students from one class to another using the Transfer – Remove option

1. Navigate to **StudentInformation** » **SIS** » **Scheduling** » **Bulk Course Section Management**.
2. On the **Choose Section** tab, enter the course section and click **View**.
3. Click the **Trash Can** next to any student whom shouldn't be transferred from the course section.
4. Click **Next** to move to the 2nd tab named **Choose Action**.
5. Choose the **Transfer** option.
6. The new section must be the same course term & course type as the course section the student is transferring out of.
7. Next, select the **Remove** option.
8. The new section the student is moving to will have a start date equivalent to the start date of the section the student transferred out of.
9. Click **Next** to move to the 3rd tab named **View Conflicts**.
10. Students who will have a scheduling conflict as a result of being transferred into the new course will display in the grid.
11. Click the **Trash Can** next to any student whom shouldn't be transferred into the new course section.
12. Click **Next** to move to the final tab named **Summary**.
13. Now finish the transaction by clicking **Submit**.
14. The following message will display: **Transfer was successful**.
15. The course the students transferred out of will display with two locks on the CSA page when **Removed** is marked. The transferred out of course will not display on the Request Assignments page.
16. Any marks or period attendance associated with old class have been transferred to the new course.