Schedule Changes Step by Step

Change Log

Date	Section Number/Name	Change Description
8/4/17	Scenarios 1, 2	Updated dates and screenshots Added note about Run Scheduler and Schedule Study Halls options
10/24/16	Scenarios 2, 7, 9, 10, 11	16.0.0 Updates – Updated screenshots
2/10/16	Scenario 8	Delete Note as it is no longer applicable. NOTE: If CLISEMIS/CTRMEMIS has been run in update mode for Period K and the class is a vocational course (denoted by a curriculum value starting with a letter V on the EMIS tab of the course) the remove function will be disabled. Removes can't be performed on Vocational courses after CLISEMIS/CTRMEMIS is run in update mode.
7/31/15	Scenario 6	Fix breadcrumb trail
11/21/14	Entire document	Update screenshot and breadcrumb trail
06/26/13	Scenario 3 & 4	Added
06/21/13		Doc created

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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 ⬛ icon.
7. If you clicked on the ⬛ 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.

Non-Groups or Groups: ◉ Non-Groups ◯ Groups			
Course Code:		Course Type:	
Name:			
Department:	ENG - ENGLISH DEPT	EMIS Subject Code:	
Area of Study:		Course Subject Area:	
Teacher:		☐ Honors Only	
Rotation Day:	M T W R F ☐☐☐☐☐	Period of the Day:	

Search   Clear   Cancel

Course Code - Name	Department	Course Sections					
		Section	Term	Teacher(s)	Meeting Time	Capacity	Filling
➡ 116 - SPEECH	ENGLISH DEPT	21	1Sem	RICARDO GREENE	2 (117)	10	5.00
		22	2Sem	RICARDO GREENE	2 (117)	10	4.00
➡ 120 - ENGLISH I	ENGLISH DEPT	1	Year	DWIGHT DOUGLAS	1 (211)	25	22.00

⊕ 100%

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. .

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule Result Set: Default Schedule Result   Student: DALTON, DOLORES

Course/Section: 116   22   [...]

Assignment Start Date:* 8/22/2017

Assignment Stop Date:

[Save] [Save and New] [Cancel]

11. Leave the *Assignment Stop Date* field empty.
12. Click *Save*.
13. The page refreshes and the following message is displayed.

> The Course Section Assignment 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.

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule:* Default Schedule ∨   Schedule Result:* Default Schedule Result ∨   Status:* ☑ Assigned ☐ Dropped

Course: [ ] [ ] [...]   Course Term: [∨]   ☐ Removed

Date: [ ]   Teacher: [∨]   [Search]

[Add Course Assignment] [Drop All Assignments] [Schedule Study Halls]

		Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date	End Date
🗑	✏	120	ENGLISH I	1	1 (211)	DWIGHT DOUGLAS	All Year	Manual	Assigned	Aug 22, 2017	
🗑	✏	180	PEC SCIENCE	2	2 (212)	WARREN GARDNER	All Year	Batch	Assigned	Aug 22, 2017	
🗑	✏	116	SPEECH	22	2 (117)	RICARDO GREENE	2nd Semester	Manual	Assigned	Jan 16, 2018	

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*.

StudentInformation > SIS > Student > Student Schedule > Request Assignments

Student Requests & Assignments - DANIELS, EDUARDO

From this screen you can manage a student's requests and course section assignments

Request					Assignment			
	Primary	Alt.			Course	Sec	Start	Drop
✏	8004		🗑	✏	8004	1	8/23/2016	
✏	8005		🗑	✏	8005	1	1/17/2017	
✏	MHMath		🗑	✏	MHMath	1	8/24/2016	
✏	MHEnglish		🗑	✏	MHEnglish	1	8/24/2016	
✏	9009		🗑	✏	9009	3	8/23/2016	
✏	9010		🗑	✏	9010	3	1/17/2017	
✏	5001		🗑	✏	5001	2	8/23/2016	
			🗑	✏	6010	1	10/21/2016	
✏	11005		🗑	✏	11005	1	8/23/2016	
✏	11006		🗑	✏	11006	1	1/17/2017	
			🗑	✏	2011	7	8/26/2016	
			🗑	✏	2007	4	1/17/2017	
✏	MHLife Skills			✏				

👥 Course Group 👤 Group Section   ☑ Show Active Only

ⓘ Click assigned course for details

[Run Scheduler] [Schedule Study Halls]   [Add Request] [Add Assignment]
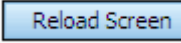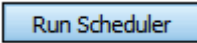
13. Notice there is no corresponding request on the same line for this course section assignment. This means the course was entered manually and did not originate from a request.

NOTE: The Student Requests & Assignments page also has the Run Scheduler and Schedule Study Halls options. These options enable student scheduling from this screen.
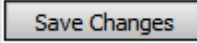
Scenario 3: Run the Single Student Scheduler for a student

F.Y.I. 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***.
   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

F.Y.I. 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.

F.Y.I. 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.

F.Y.I. 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
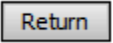
1. Change your context to the building level and the school year you are working with.
2. Navigate to ***StudentInformation » SIS » Scheduling » Bulk Assign***.
3. Select a **Working Schedule:** and **Result:** from the dropdowns if the schedule hasn't been finalized.

   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 **...** 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.

Bulk Course Section Assignment

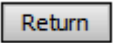Use the bulk course section assignment wizard to schedule a list of students into a list of course sections

> **The following conflicts were found.**
>
> **You may choose to allow a conflict to be saved if desired by clicking the box next to the student.**

	Number	Student	Course Code	Course Name	Section
		1043 - SENIOR MATH - CP 1			
☐	142	ACKL , SEQU	1010	ALGEBRA I	1
☐	1300	BAKE SAWY	336	INTRODUCTION TO MARKETING	1
☐	120	BARB , STEP	210	DRAWING & PAINTING	1
☐	130C	BORC , SHAN	1043	SENIOR MATH - CP	1
☐	1508	BRITT, STEVE	1311	ADV WORLD STUDIES 9	1
☐	1440	BROWN, STEPH	1320	U.S. SOCIAL STUDIES 10	1
		1217 - PHYSICAL SCIENCE 2			
☐	142	ACKL , SEQU	920	ENGLISH 10	2
☐	1300	BAKER, SAWYER	1035	ALGEBRA 2 - CP	1
☐	120	BARE , STEP	1030	ALGEBRA II	2
☐	1300	BORO , SHAN	332	PER FINANCES/ECONOMICS	1
☐	1508	BRIT , STEVE	1218	PHYSICAL SCIENCE INVESTIGATION	1
☐	14403	BROWN, STEPHONE	920	ENGLISH 10	2

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

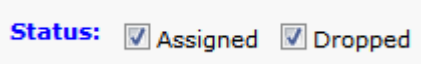**Assignments were successfully saved.**

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 ✕ 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:** ☑ Assigned ☑ Dropped is marked.

9. The marks associated with the course should display on the Student Marks page with a yellow background.

635 - LATIN IV Section 1 **QUINN WHIT**	97.50	94.27	90.60											
950 - AP ENGLISH Section 1 **Katherine Gle**	97.69	98.26	108.75											

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 ✕ 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 🔒🔒 on the CSA page when ☑ 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 **Transer** 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 ✕ 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:** ☑ Assigned ☑ Dropped is marked.
10. The marks associated with the course should display on the Student Marks page with a yellow background.

635 - LATIN IV Section 1 **QUINN WHIT**	97.50	94.27	90.60							
950 - AP ENGLISH Section 1 **Katherine Gle**	97.69	98.26	108.75							

11. Any period attendance entered for the course section will remain.

Bulk Course Section Management

The course section transfer screen allows users to transfer students from one course section to another course section.

Choose Section | Choose Action | View conflicts | Summary

‹ Back | Next ›

⦿ Drop

Student will appear on class lists for this assignment until the stop date has passed.

Stop Date: 4/23/2013

◯ Remove / Delete

◯ Transfer

‹ Back | Next ›

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 ✕ 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 🔒🔒 on the CSA page when `☑ 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 ✕ next to any student whom shouldn't be transferred from the course section.

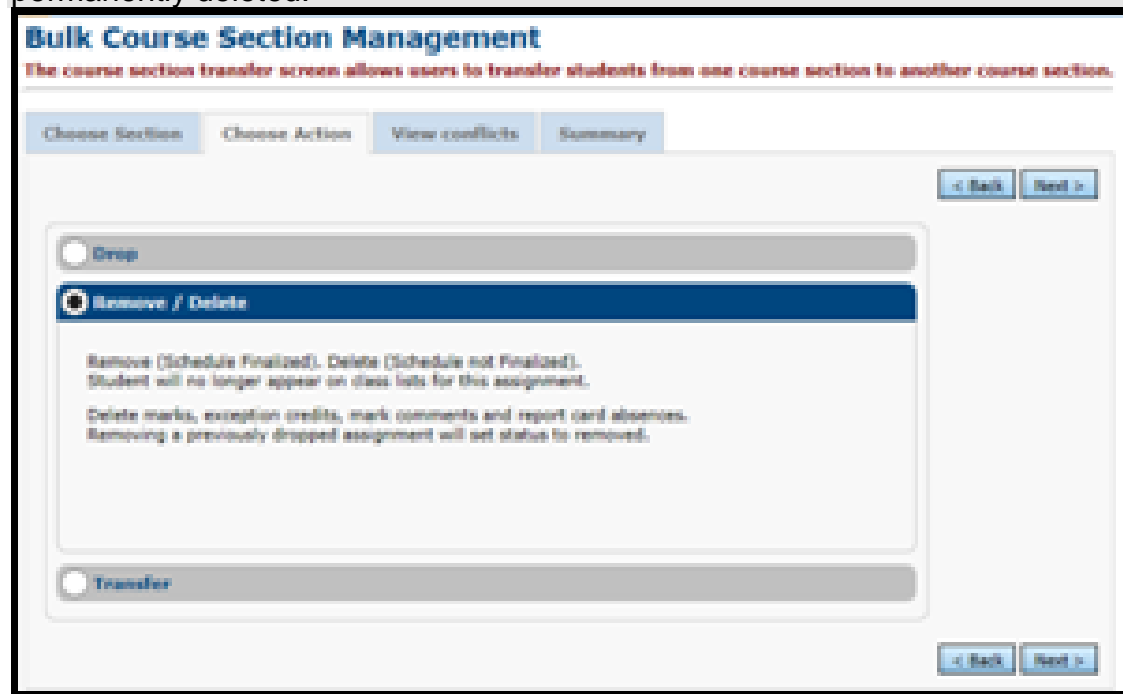4. Click `Next >` to move to the 2nd tab named `Choose Action` .

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  ○ Remove`

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 ✕ 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.

Bulk Course Section Management

The course section transfer screen allows users to transfer students from one course section to another course section.

| Choose Section | Choose Action | View conflicts | Summary |

[< Back] [Next >]

○ **Drop**

○ **Remove / Delete**

● **Transfer**

Transfer marks to the new assignment when both have the same course term and course type. New assignment will retain the assignment start date of the removed assignment.

| 1047 | | 1 | | ... |

● Drop ○ Remove

The original assigned course will be marked as dropped with the stop date entered. The new assignment will begin with a start date of the next attending day.

Stop Date: 4/23/2013 ▼

[< Back] [Next >]

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 ✕ 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 ⬤ 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 ✕ 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 🔒 🔒 on the CSA page when ☑ Removed is marked. The transferred out of course will not display on the RA page.

16. Any marks or period attendance associated with old class have been transferred to the new course.

Bulk Course Section Management

The course section transfer screen allows users to transfer students from one course section to another course section.

| Choose Section | Choose Action | View conflicts | Summary |

< Back   Next >

Drop

Remove / Delete

Transfer

Transfer marks to the new assignment when both have the same course term and course type.
New assignment will retain the assignment start date of the removed assignment.

| 1047 | 1 | ⚡ | ... |

○ Drop ● Remove

The original assigned course will be removed with a stop date equal to the start date.
The new assignment will begin with a start date equal to the first day of the corresponding term.

< Back   Next >