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MASTER SCHEDULING REFERENCE GUIDE

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Master Scheduling Reference Guide

Description

Infinite Campus has various tools to complete a master schedule, which is the *prioritized* organization of course sections, staff availability, student needs, and physical resources, so that optimal learning can take place. This guide encompasses the tools necessary for creating and managing student schedules. The positioning and re-positioning of sections, course priorities, and scheduling rules play a key role in developing an effective master schedule.

Target Audience

Master Schedulers

Objective

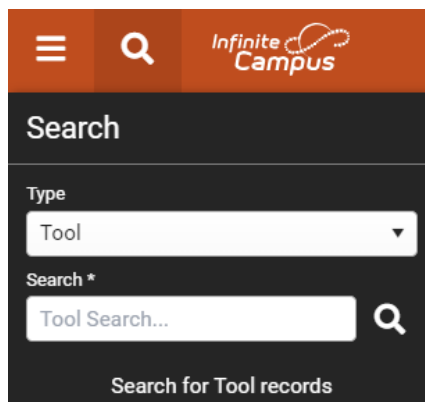
To aid in the creation of a Master Schedule in Infinite Campus.



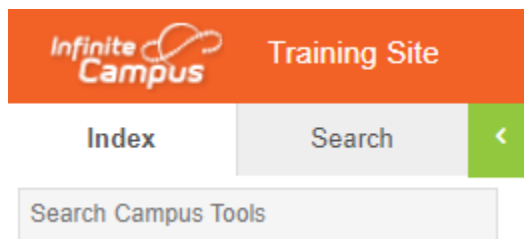
Special Note:

There is a Classic Look and a New Look of Infinite Campus. The images in the linked articles may not match the version of Infinite Campus you currently have. Use the tool search in either version to access the tools referenced in the article(s).

New Look



Classic Look



General Scheduling Resources

Description

Master Scheduling is multi-faceted. It is important to know which different components of Infinite Campus impact the ability to master schedule.

Links on Campus Community

Scheduling (article): <https://kb.infinitecampus.com/help/scheduling-9aa9446>

New Scheduling Tool Overview (video): <https://kb.infinitecampus.com/help/new-scheduling-tools-overview-video>

Understand Scheduling (video): <https://kb.infinitecampus.com/help/understand-scheduling-video>

Tool Rights for Scheduling (article): <https://kb.infinitecampus.com/help/tool-rights-scheduling>

Checklist for Scheduling (article w/links): <https://kb.infinitecampus.com/help/checklist-for-scheduling>

Scheduling Center (article): <https://kb.infinitecampus.com/help/scheduling-center>

Scheduling Center (video): <https://kb.infinitecampus.com/help/scheduling-center-video>

Tips, Trick, & Resources

- Tool Rights should be reviewed each year. When Infinite Campus adds new tools, tool rights to them are not automatically added to users. Adding tool rights may be a system administrator task
- Not all of the items listed on the Checklist for Scheduling will be applicable for all users – try to get a picture of how the master schedule was developed in prior years by seeking out those who were involved
- Use the Scheduling Center to gauge how far along the schools are in the scheduling process

Calendars & Enrollments

Description

Prior to creating a master schedule, a calendar for the year must be created. A calendar consists of a school year and a school. Components of the new calendar must be completed prior to viewing curricular information in the new calendar. Rolling forward the student enrollments must also be completed. Both of these must be completed prior to master scheduling.

Links on Campus Community

Understanding Calendars & Years (video): <https://kb.infinitecampus.com/help/understanding-calendars-and-years-video>

School Years Setup (article): <https://kb.infinitecampus.com/help/school-year-setup>

School Years (video): <https://kb.infinitecampus.com/help/define-school-year-detail-and-preferences-video>

Calendar Prep (article w/links): <https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide>

Understand Calendar Structures (video): <https://kb.infinitecampus.com/help/understand-calendar-structures-video>

Calendar Wizard (article): <https://kb.infinitecampus.com/help/calendar-wizard-a>

Calendar Roll Forward (video): <https://kb.infinitecampus.com/help/copy-calendar-by-rolling-forward-video>

Create New Blank Calendar (video): <https://kb.infinitecampus.com/help/create-new-blank-calendar-video>

Copy Data into Existing Calendars (video): <https://kb.infinitecampus.com/help/copy-data-into-existing-calendars-video>

Calendar Details (article): <https://kb.infinitecampus.com/help/calendar-details>

Calendar Details (video): <https://kb.infinitecampus.com/help/define-system-required-calendar-data-elements-video>

Delete Calendars (video): <https://kb.infinitecampus.com/help/delete-calendar-video>

Schedule Structures (article): <https://kb.infinitecampus.com/help/schedule-structure>

Grade Levels (article): <https://kb.infinitecampus.com/help/grade-levels>

Understand Grade Levels (video): <https://kb.infinitecampus.com/help/understand-grade-levels-video>

Terms (article): <https://kb.infinitecampus.com/help/terms>

Define Terms & Term Dates (video): <https://kb.infinitecampus.com/help/define-terms-and-term-dates-for-a-school-video>

Understand Terms (video): <https://kb.infinitecampus.com/help/understand-calendar-terms-video>

Periods (article): <https://kb.infinitecampus.com/help/periods>

Understand Period Schedule Options (video): <https://kb.infinitecampus.com/help/understand-period-schedule-options-video>

Period Schedules & Period Setup (video): <https://kb.infinitecampus.com/help/period-setup-video>

Days (article): <https://kb.infinitecampus.com/help/days>

Understand Calendar Days (video): <https://kb.infinitecampus.com/help/understand-calendar-days-video>

Manage Calendar Days (video): <https://kb.infinitecampus.com/help/manage-school-calendar-days-video>

Rolling Enrollments Forward (article w/links): <https://kb.infinitecampus.com/help/scheduling-prep-roll-enrollments-reports-and-constraints-to-next-calendar>

Tips, Tricks, & Reminders

- It is a best practice when rolling calendars forward to select all of the data unless you are changing term structure or period schedules. This tip applies even if you are planning to use the builder
- Contact your Infinite Campus support desk prior to creating additional schedule structures or multiple calendars. There may be other ways to accomplish the needs of the district without using these tools, and there may be limitations with your state reporting
- If you don't know the exact dates for the terms, you can put in estimated dates and change them when they have been finalized
- Don't forget to run the Day Rotation tool if you have more than 1 rotation day. If you don't know the exact dates for vacations, in-service, and holidays, you can run the tool again after they have been finalized to update the rotation

Course Prep

Information housed on courses impacts the master schedule. Many of these fields may be modified in the browser or by using the Course Planning tool of the Scheduling Board. Before master scheduling begins, the courses should be checked for accurate information.

Links on Campus Community

Add/Adjust Courses for Future Calendar (article w/links):

<https://kb.infinitecampus.com/help/scheduling-prep-addadjust-courses-for-future-calendar>

Add Course (article): <https://kb.infinitecampus.com/help/add-course>

Add Course – No Course Catalog (video): <https://kb.infinitecampus.com/help/add-course-no-course-catalog-video>

Course Information (article): <https://kb.infinitecampus.com/help/course-information1>

Course Sections (article): <https://kb.infinitecampus.com/help/sections>

Course Sections – Edit, Add, View (video): <https://kb.infinitecampus.com/help/add-section-to-a-course-video>

Scheduling Group – Teams (article): <https://kb.infinitecampus.com/help/scheduling-group>

Section Staff History (article): <https://kb.infinitecampus.com/help/section-staff-history-article>

Requests & Rosters (article): <https://kb.infinitecampus.com/help/requests-and-rosters>

Course Rules (article): <https://kb.infinitecampus.com/help/course-rules#scheduling-rules>

Understanding Course Rules (video): <https://kb.infinitecampus.com/help/understanding-course-rules-video>

Tips, Tricks, & Reminders

- Requests and Rosters is a task-based tool that provides the scheduling team (counselors, administrators, etc.) a way to manage student requests and section rosters in one location, such as:
 - Update course sections to modify the student's start and end dates in the section and indicate whether the student is repeating this course and/or receiving credit for this course
 - Create course requests based on a scheduling team, an Ad hoc filter, existing requests, or previous section rosters
 - Remove course requests
 - Copy section rosters from one course to another course
 - Manually build section rosters for specific courses or grade levels or groups of students
 - Copy, add, or remove students from a section
- If a course is no longer going to be offered, it can be marked as inactive but only in the future year. Prior to making it inactive, remove all course requests for it (use Requests & Rosters), and delete out all associated data with the course (staff history and sections). Once requests have been removed and sections have been deleted it is safe to make the course inactive. If these steps are not taken, it could create “ghost” requests for the course thus throwing off the completion numbers
- Departments are important for organizing like courses. If departments are not used, the courses will be listed in numeric order in the Scheduling Board and there won't be an option to load or build by department
- If a course-section does not have a teacher assigned on the Staff History area, the students can still be scheduled into the section. A teacher can be added at any time

- Scheduling Rules affect how course sections will roster onto a student's schedule
 - Many rules, although very important to the end result, are restrictive in nature
 - Too many course rules can negatively impact the performance of the Scheduling Board. Only apply rules that are necessary
 - It is very important to test how the rules are working by trying loads with and without the rules
 - If you are using the builder, please note that there are very few scheduling rules that will affect how the system will build sections
 - Planning rules, for the Academic Planner, are not Scheduling rules

Course Requests

In order for rosters to be completed using the Load function in the Walk-in Scheduler or the Scheduling Board, the students must have course requests entered on their walk-in scheduler. Course requests may be added by teachers who select a course for a student, by a student requesting it via the portal, by a counselor adding the request manually, by a master scheduler using the Request & Rosters tool and/or from the Academic Planner. Each district determines how course requests are entered so not all of the aforementioned will apply to all districts.

Links on Campus Community

Walk-In Scheduler (article w/links): <https://kb.infinitecampus.com/help/walk-in-scheduler>

Requests & Rosters (article): <https://kb.infinitecampus.com/help/requests-and-rosters>

Requests & Rosters (video): <https://kb.infinitecampus.com/help/requests-and-rosters-video>

Course Registration on Campus Student Portal (article):
<https://kb.infinitecampus.com/help/course-registration-campus-student>

Course Requests on Campus Instruction – Teacher (article):
<https://kb.infinitecampus.com/help/course-requests-instruction>

Course Requests on Campus Instruction – Teacher (video):
<https://kb.infinitecampus.com/help/enter-course-request-for-next-school-year-video>

Academic Plan on Campus Student Portal (article): <https://kb.infinitecampus.com/help/course-registration-campus-student>

Course Recommendations on Campus Instruction – Teacher (article):
<https://kb.infinitecampus.com/help/student-course-recommendations-instruction>

Course Recommendations on Campus Instruction – Teacher (video):
<https://kb.infinitecampus.com/help/create-recommendations-for-future-enrollments-video>

Course Plan Admin (article): <https://kb.infinitecampus.com/help/course-plan-admin>

Tips, Tricks, & Reminders

- Requests are necessary for the Scheduling Board to load rosters and/or build sections
- Requests can also be made from Academic Plan Course Recommendations by using the Course Plan Admin tool. Academic Plan Programs must first be set up and assigned to students. See the Academic Planner reference material for more information
- Course requests should always be made in the future school year for master scheduling
- Course requests on the Walk-In Scheduler are labeled with R, E, or A. Rs and Es are used by the Scheduling Board to roster students and to count scheduling units. The A requests are ignored by the Scheduling Board, the schedule units counter, and the load function in the Walk-in scheduler.

Course Planner

The Course Planner displays request tallies, computes number of sections needed, and compares students' requests and sections to last year's calendar to see how these changes may affect section staffing needs. Any scheduling related course item can be modified in the Course Planner, including course constraints, room placement and teacher assignment.

Links to Campus Community

Course Planner (article): <https://kb.infinitecampus.com/help/course-planner-course-planner>

Course Planner (video): <https://kb.infinitecampus.com/help/course-planner-video>

Tips, Tricks, & Reminders

- The Course Planner can be used throughout the scheduling process, but is best used after calendars for the next school year are created and enrollments have been rolled forward and student requests are entered
- Be sure to select the correct calendar in the context switcher before using this tool
- This Course Planner can be accessed when in the Scheduling Board
- This tool can be used to mass update course scheduling data

Staff Planner

The Staff Planner allows schools the ability to establish the following boundaries as it relates to a teacher and a course: Teacher to Course Constraints - how many courses a teacher can teach during the day, Teacher to Room Constraints - where the teacher teaches those courses, Teacher Placement Constraints - when the teacher teaches those courses.

Links to Campus Community

Staff Planner (article): <https://kb.infinitecampus.com/help/staff-planner-staff-planner>

Staff Planner (video): <https://kb.infinitecampus.com/help/staff-planner-video>

Tips, Tricks, & Reminders

- This tool can also be accessed from the Scheduling Board
- Be sure to select the correct calendar in the context switcher before using this tool
- This tool is generally useful for schools who wish to use the Builder options to create their master schedule
- The more restrictions placed on a staff member the more difficult it is for the Board to create a schedule
- Using a combination of rules or multiple rules usually limits the fulfillment of student requests. Only add rules when absolutely necessary
- Assigned teachers and staff members are added to the section on the Staff History tab in the browser and can become part of the teacher display

The Scheduling Board

The Scheduling Board provides a visual representation of a school's overall schedule, much like a spread sheet or a magnetic white board to visualize and build the school's schedule. This visualization has been digitized in the Scheduling Board.

Users can easily see the schedule being built in real time, along with any teacher and room conflicts. Course sections can be dragged and dropped onto the schedule grid, and moved around to other terms and periods, or removed completely. Quickly load and unload course sections, build and unbuild all the courses, lock and unlock section rosters, all within one tool.

Links on Campus Community

Scheduling Board Trials (article): <https://kb.infinitecampus.com/help/scheduling-board-trials-new>

Scheduling Board (article): <https://kb.infinitecampus.com/help/scheduling-board-new>

Tips, Tricks, & Reminders

- The Scheduling Board opens within the Infinite Campus browser window and is responsive in design
- Be sure to select the correct calendar in the context switcher before opening an active trial

- The Active Trial is the one that is bold and labeled “Active” in parentheses. Information that users see in a browser comes from the active trial
- A user should never go into the Active Trial for the current school year to make changes
- There is no limit to the number of Trials a user creates but there can only be one marked Active
- It is a best practice to make a copy of the “Rolled In” Trial, make the copy Active, and begin working on the Master Schedule in the copy, or other copies. This will allow you to go back to the previous school year’s master schedule and subsequent changes
- Use the Set Period Axis to change the layout of whether periods should be displayed across the top of the board or on the left-side of the board
- If the whiteboard is too small and difficult to see, use the bracket button to make it go full screen. Use the zoom in/out features of the browser to increase/decrease the font size
- Use the Settings to determine what to display on the screen and what to hide (e.g. terms, courses, period schedules, departments, et al.)
- Be sure to properly exit the trial so as not to lock other users out of scheduling related areas.

Scheduling Board Builder

The Builder is a tool that uses course set up, scheduling rules, build constraints, and requests to create the Master Schedule. Instead of having the sections pre-built from the rolled in calendar, the builder uses the data entered in the previously mentioned areas to create sections for the master schedule. To use the Build tools in the Scheduling Board, you must set up the constraints in the Course and Staff Planners. These constraints can be rolled forward from one year to the next once they have been created.

Links to Campus Community

Builder Settings <https://kb.infinitecampus.com/help/scheduling-board-new#build-settings-side-panel>

Student Constraints – Scheduling (article): <https://kb.infinitecampus.com/help/student-constraints>

Tips, Tricks, Reminders

- Room priorities set to 0 will result in auto-build failures. To assign a teacher to a particular room it is best to use the Staff Planner and leave rooms off of the Course Planner

- If there is an auto-build failure without an indication of why it failed, try being less restrictive with teachers and/or room assignments
- A full build could take 1-2 minutes. If it doesn't complete after that time, refresh the browser or restart the computer. The build will not be saved and you will be locked out of the scheduling board.
- If you want to assign a teacher to a room, put it in Staff Planner, and leave the course rooms blank
- The only Scheduling Rules that affect the building of a master schedule are used to align half year sections in Sem 1 & Sem 2 with same period & same teacher rules
- The Builder Configuration options include a preference to enable/disable the preferred section placement when dragging and dropping

Scheduling Board Loading Tools

The Loading tools in the Scheduling Board will take the student requests and attempt to place students into their courses (AKA roster the students). In order for the Loading tools to work, the schedule framework has to be established meaning the course-sections have to be in place on the whiteboard.

Links on Campus Community

Load Settings <https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel>

Tips, Tricks, & Reminders

- You can load by department by right-clicking on the name of the department and selecting "Load Department"
- You can load by course by right-clicking on the name of the course and selecting "Load Course"
- You can run a full load more than once (without unloading) and the system will bypass already rostered requests and re-attempt to roster all un-rostered requests. Students who are locked on the roster will not be re-shuffled.
- When running a full load the board always starts with the highest grade in the school and works its way down. If a lower grade is a priority, it can be selected in the Load Settings
- Depending on the search depth of the run, a full load does not usually take more than 3-5 minutes

Course Priorities

Course Priorities also impact the loading of students on the roster. The order that the Walk-in scheduler and Scheduling Board works on a student's requests is determined by the number of sections of the course or the course priority, if it is present. A common practice, in using the numbers 1 through 9 where 1 is the most potent, is to assign all courses a priority 5 and then maneuver priorities from there.

Tips, Tricks, & Reminders

- Course priority plays an important role in determining which courses, if not all, will be rostered
- The factors that you should consider in assigning priorities include number of sections, importance of the course, and how much of the day it takes up
- Appropriate priorities will vary from school to school, but a good guideline in a 1 thru 9 system for a high school is:
 - Priority number < 5
 - Important courses with limited sections
 - Courses with rules that increase the number of units
 - Courses/sections that span several periods
 - Priority number = 5
 - Core courses with many sections
 - Priority number > 5
 - Elective courses
 - Half year / Alternate day classes

Working in the Scheduling Board

Tips, Tricks, & Reminders

- On positioning and re-positioning of sections: Course sections should be relocated to different positions when they are not loading as well as other sections
- If the checkboxes in the Autoloader config are checked you will get an indication if the move is good by the number of students who can easily be rostered in the new position. The real check, however, is the result when a full unload and load is done
- The system will suggest, based on section placements and student requests, where a section should be placed when manually creating a section or moving a section. Sometimes, the suggestions are very good. Other times not so good. If you do not want the system to suggest a particular period, mark that period as restricted for all or most courses in the course planner or turn off the suggestion feature in the Builder Configuration options

Reports

Various reports are available and may be used during the different stages of the scheduling process.

Links on Campus Community

Master Schedule: <https://kb.infinitecampus.com/help/master-schedule>

- The Master Schedule report lists detailed information about each section in a schedule. The report lists roster counts by gender and special education status, section placement, team, room and teacher

Request Batch: <https://kb.infinitecampus.com/help/request-batch>

- The Request Batch Report prints a list of student requests, one page per student for the selected calendar in the toolbar. It can be given to students if necessary

Request Detail: <https://kb.infinitecampus.com/help/request-detail>

- The Request Detail Report returns a list of the students who have a request for the selected course(s) for the upcoming school year. The report uses information entered by either counselors, teachers or students when planning the course schedule for the next school year. Requested courses can be viewed from the student's Schedule tool in the Walk-In Scheduler

Request Satisfied: <https://kb.infinitecampus.com/help/requests-satisfied>

- The Requests Satisfied Report counts the requests made and those satisfied per grade, per course. Information in this report matches the information that appears in the Scheduling Board and in Requests and Rosters. It is useful for reviewing grade level requests to make sure students did not request courses that are not grade level appropriate. It is also useful for viewing section allocation needs based on the number of requests, max seats, and currently placed sections

Schedule Units: <https://kb.infinitecampus.com/help/schedule-units-report>

- The Schedule Units Report shows a count of the number of units that can potentially be filled by a student's course requests. The report can be generated for all students, or filtered to only those students who have not requested enough courses to fill their schedule.
 - o The number of units for a full schedule is calculated using the number of periods in each period schedule that is in use, multiplied by the number of terms in which they are assigned in the selected calendar in the Campus toolbar. Scheduling Units = # Terms X # Period Schedules X # Periods
 - o The number of units that each course can fulfill is determined by multiplying the values entered into the **Terms**, **Schedules** and **Periods** fields on Course Information

Schedule Conflicts: <https://kb.infinitecampus.com/help/schedule-conflicts-report>

- The Schedule Conflicts Report lists each non-alternate request that has not been fulfilled in the currently active trial
 - When all sections for that course are full, the report displays NO SEATS REMAIN
 - When the Course only has one section, and the student has a course in their schedule that also only has one section, the report displays SINGLETON CONFLICT
 - When the student has no schedule gaps, or the size of the course is larger than the size of the schedule hole, the report displays FULL SCHEDULE
 - When the Conflict type column is blank (no words display), student requests have not been scheduled. For all other situations, the report displays CONFLICT

Request Conflicts: <https://kb.infinitecampus.com/help/request-conflicts>

- The Request Conflicts Report provides a list of courses that have scheduling issues with another course when a student has requested both courses and how many student requests are in conflict. The report displays course pairs where a student has requested both courses

Tips, Tricks, & Reminders

- Most reports may be generated in PDF, DOCX, or CSV