Eastern Suffolk BOCES

Educational Services That Transform Lives

STUDENT DATA SERVICES

Calendar Roll

Release Pack 2447.6

ESBOCES
December 2025

Overview of Calendar Administration

Calendar information is the basis for all student-related data. Students are enrolled into a calendar, courses are made active for a calendar and state reporting information is based on calendar years.

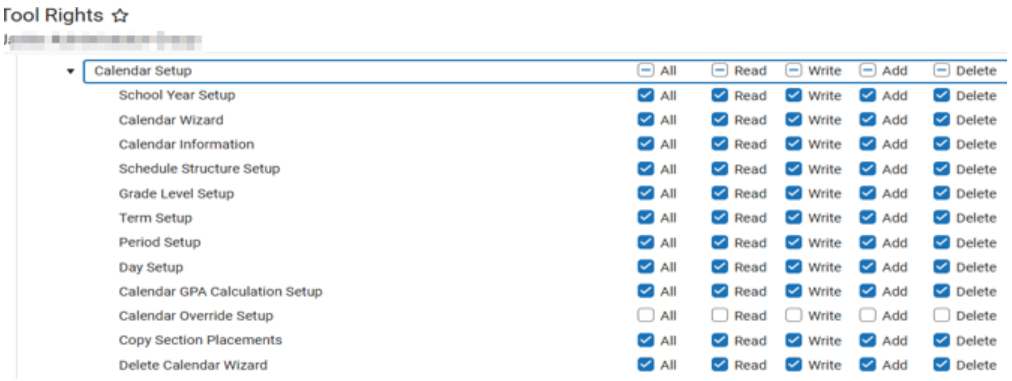
Before the scheduling process can begin, calendars need to be created and modified. The timeline is a district preference. Most districts roll secondary schools earlier than their elementary/intermediate buildings because the schedules are more complex. Keep in mind that users should be given restricted access to future calendars to eliminate data errors and prevent confidentiality issues.

Schedule Prep can take place after calendar roll, ensuring that all data and rules are in place for the effective use of the Scheduling Board.

User Security

Calendar Administration should be done with care. Very few users should have the ability to create, delete and modify calendar-related items.

The staff members that are responsible for the administration of district or school calendars should have appropriate tool rights in the **User Management > User Groups > Tool Rights.**



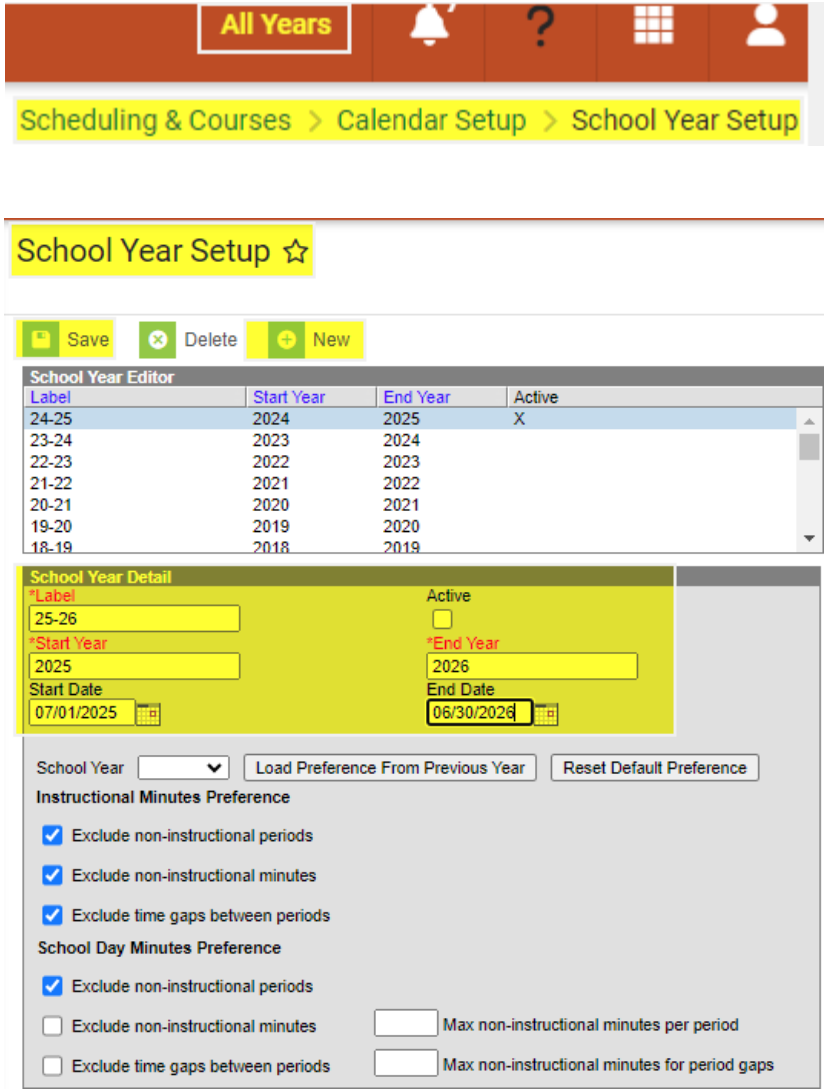
- Read: See information
  - On a "wizard" tool, read access is usually enough rights to run all steps!
- Write: Over-write information and click Save
- Add: Create an entirely new record and save
- Delete: Use sparingly!
  - Calendars may now be deleted from the front end of Campus, but this right should be reserved for very few staff members.

"Overrides" refers to a feature that does not apply to New York.

Creating A School Year

Scheduling & Courses > Calendar Setup > School Year Setup

- If the upcoming school year doesn't already exist in the database, the school year needs to be created before any calendars can be created within that year. The School Years tab lists all years for which data is stored in Campus. Only one school year can be marked as the active year at any given time.
- Select the New icon.
- Enter Label of the New School Year.
- Enter Start Year and End Year (yyyy).
- New School Year start and end dates must be 07/01/20xx and 06/30/20xx, respectively.
- Instructional Minutes Preference settings pertain to the <u>student attendance minutes</u> count.
- School Day Minutes Preference settings pertain to <u>teacher day minutes</u> count.
- You may choose to use preferences from a prior year by selecting from the drop-down menu.
- Do <u>not</u> check *Active* until you are ready for this to become the default school year.
- Click Save.



Calendar Roll Workflow

Things to consider:

Districts may opt to roll their entire calendar (all elements). Others choose to start with a completely blank calendar. ***It is suggested you roll everything, and save a trial with the rolled info. If necessary, a blank trial can be created afterward.***

By rolling everything, saving it in a scheduling board trial, and then making adjustments in an alternate trial, you have the option to use the prior year as a "template" rather than having to rebuild from the start. Also, you will have the original-roll trial in place should your new schedule scheme present an unresolved issue.

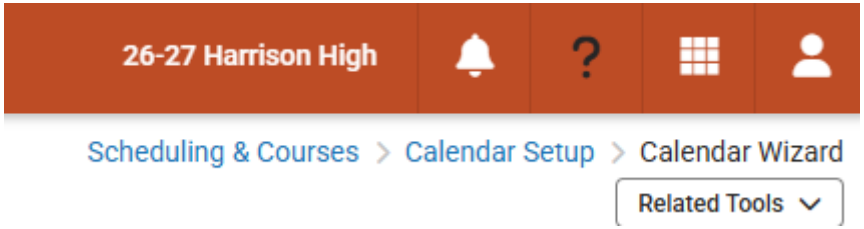
- Roll calendar(s) forward - partial roll is possible
- Roll reports forward
- Roll necessary remaining calendar data not selected in the original roll and complete terms, days, and rotation elements
- Roll in students - inform all staff that start/end enrollments must now be updated in both years
- Assign limited calendar rights to new year
- Make any course offering / teacher placement changes that are appropriate

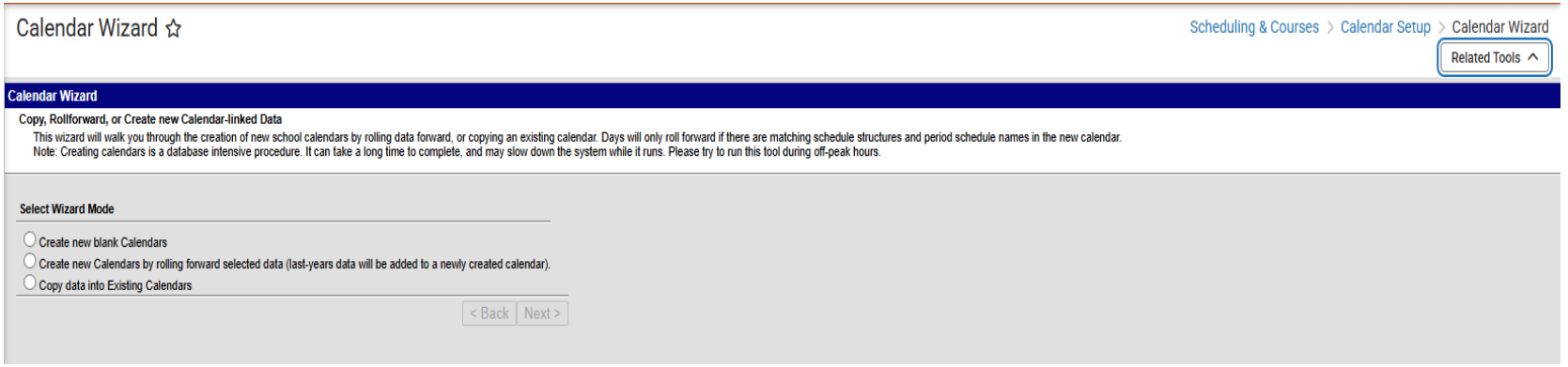
Calendar Wizard

Scheduling & Courses > Calendar Setup > Calendar Wizard

The Calendar Wizard allows a user to quickly create new calendars from scratch (blank calendars), or from previous calendars (rolling forward).

Partial calendar-element rolls are possible, and information can be copied from an existing calendar into another.

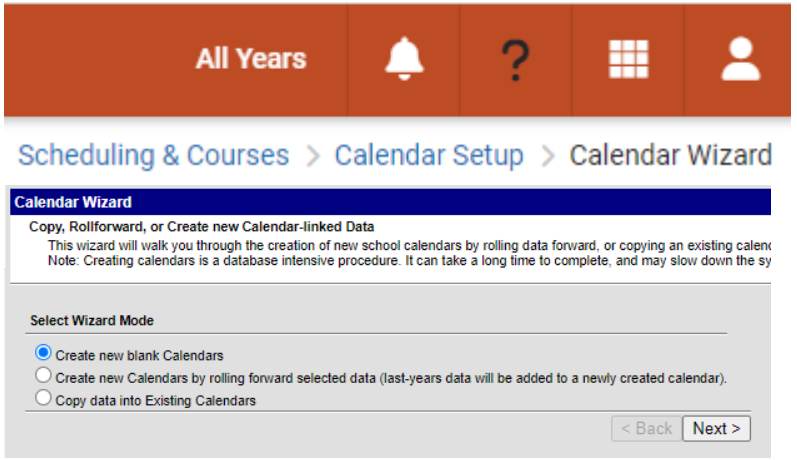


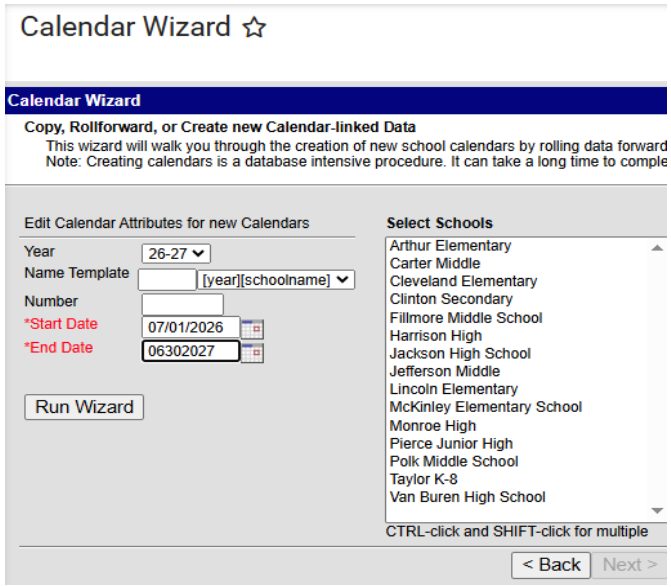


Creating a Blank Calendar

Scheduling & Courses > Calendar Setup > Calendar Wizard

- Click the first button, Create new blank Calendars under Select Wizard Mode and click the next box.
- When creating a blank calendar, you must choose the new school year. The wizard does NOT default to the year following the “active” year, it defaults to the latest calendar year available.
- Select the name scheme template (which can be updated later).
- Enter a number (optional- Campus will assign a default calendarID for reference).
- Select a school building for the new calendar (list is populated from **School & District Settings > Schools > School Information**).
- Multiple schools may be chosen at this time.
- Click Run Wizard.



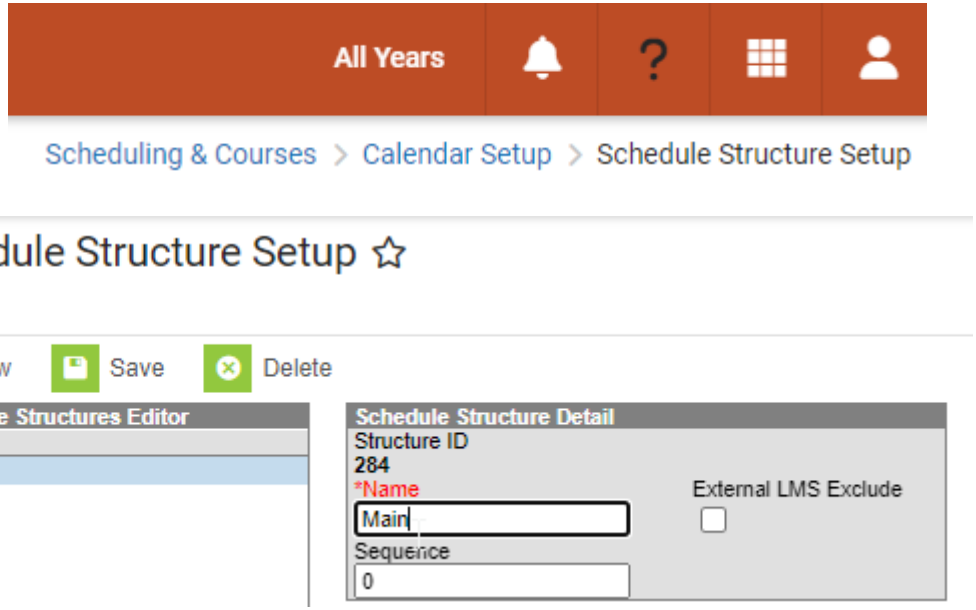


Creating a Blank Calendar (Ctd.)

Scheduling & Courses > Calendar Setup > Schedule Structure Setup

- The calendar tab will show the new calendar ID, the default name scheme chosen in the wizard preference, and the start/end dates chosen in the wizard. The required fields can be overwritten, or other fields can be filled if necessary, and click Save.

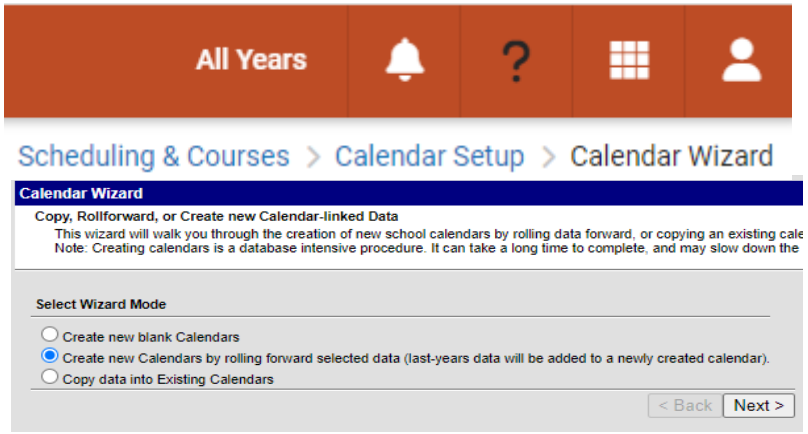
- All other calendar tab elements will be blank, and it will be necessary to create the new elements by hand, or copy them from existing calendars using the wizard/copy function.



Create a New Calendar by Rolling Forward

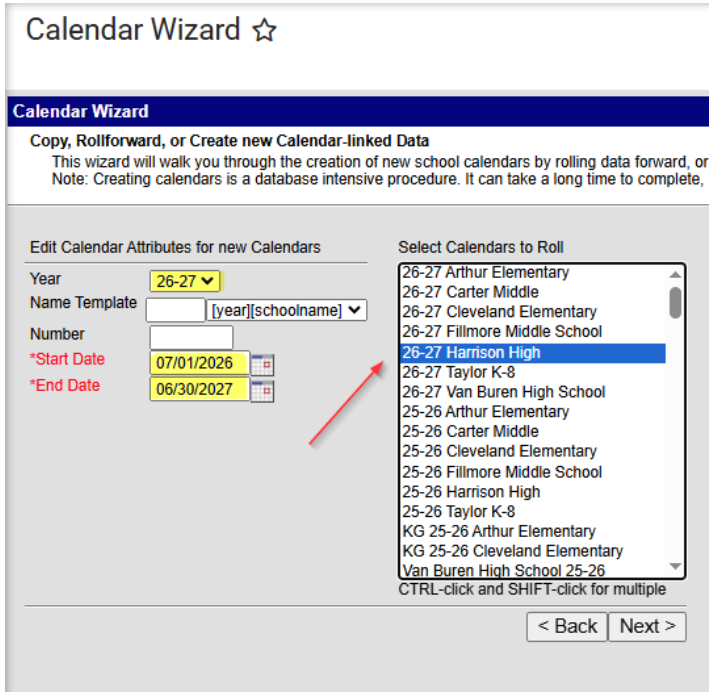
Scheduling & Courses > Calendar Setup > Calendar Wizard

- Click the second button, “Create new Calendars by rolling forward selected data…” under Select Wizard Mode, then click the Next button.



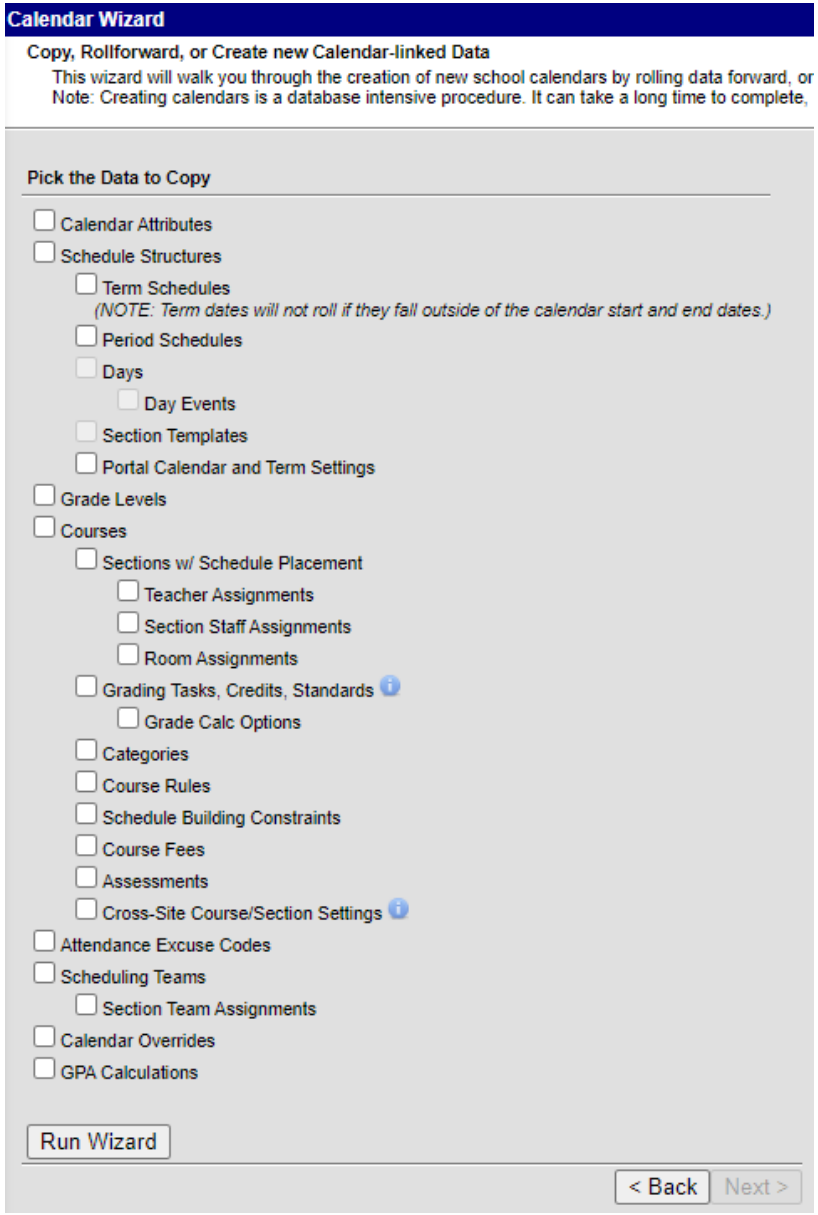
Scheduling & Courses > Calendar Setup > Calendar Wizard

- This screen functions exactly as the blank calendar screen, with one important exception:
  - This copier rolls from specific CALENDARS created for the selected school building; if the wrong year is chosen for roll, calendar elements (courses, teachers, terms, etc.) will be copied, it does not auto-roll from the active year’s elements.
- Remember 07/01/20xx and 06/30/20xx must be the start and end dates.



Create a New Calendar by Rolling Forward (Ctd.)

- **Select the elements to roll forward**. A partial roll is possible, and elements may be copied after the original roll. Once rolled, they can only be removed by creating and loading (activating) a new schedule trial, or by manually changing in the Campus application.
  - **Calendar attributes** will roll the student day minutes, whole day absence minutes, summer school checkbox preference, etc. from the Calendar tab.
  - **Term schedules** will roll the term format, but not the actual dates. They will need to be reassigned to new dates that fall within the new school year.
  - **Days** can not be rolled, as the current year's date will not reoccur in the future year.
  - **Calendar Overrides** do not apply in NYS -selecting or deselecting this box will have no effect.



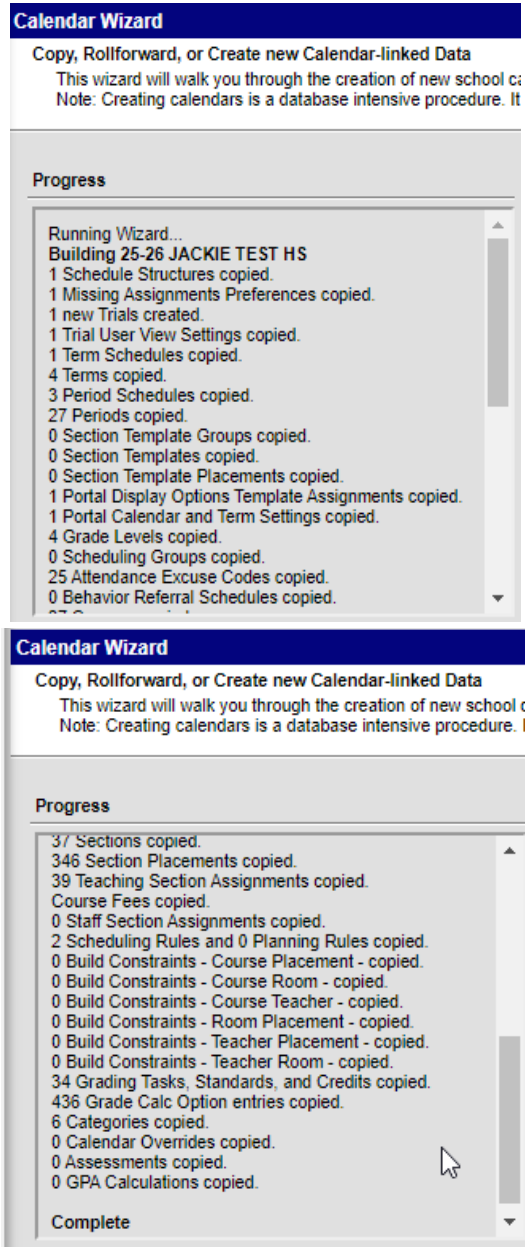
Create a New Calendar by Rolling Forward (Ctd.)

- After your selections are made, and Run Wizard is clicked, you can review the changes made by the wizard. There will be a message stating Complete at the bottom of the window. If you do not see this message, wait before changing modules.

From the Calendar Wizard header:

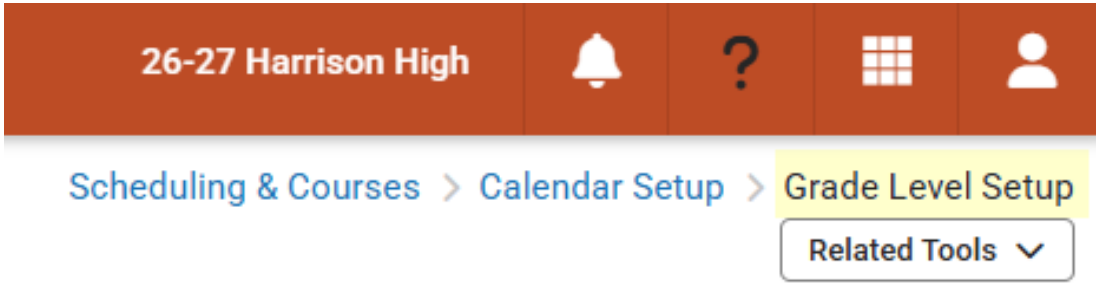
Note: Creating calendars is a database intensive procedure. It can take a long time to complete, and may slow down the system while it runs. Please try to run this tool during off-peak hours.

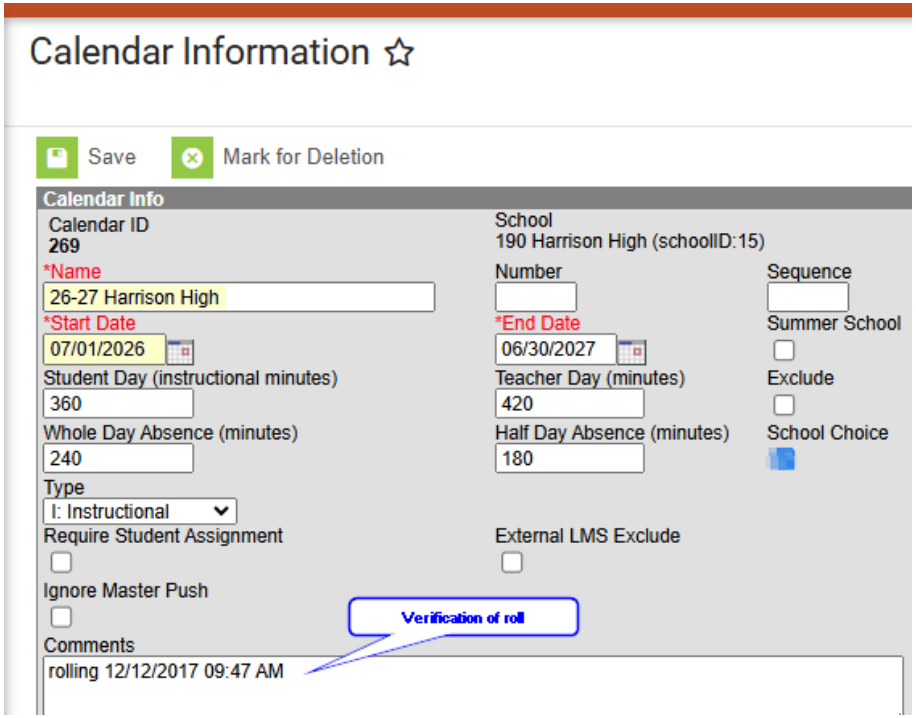
- You may receive an error message if the calendar has already been rolled with the identical calendar attributes. If you receive an error message indicating attempts at creating duplicate records, log off and log back in to confirm the calendar has not already been rolled.

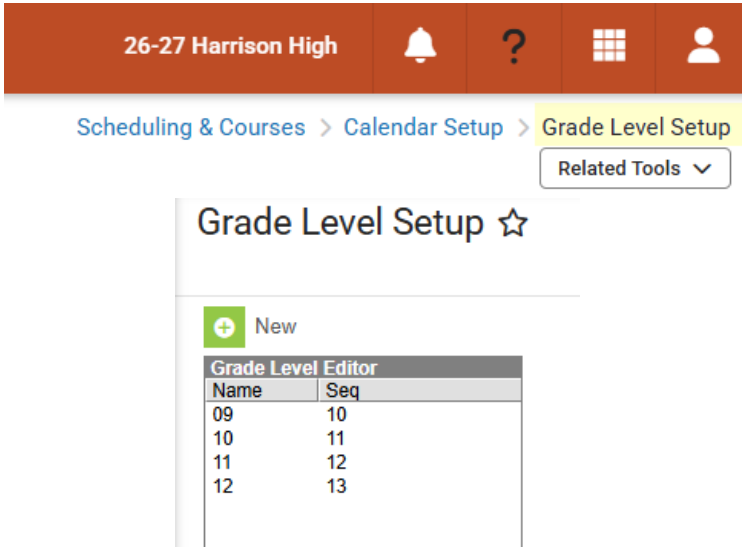


Clean your new Calendar data elements

- When the new calendar is accessed, check all the rolled in preferences.
- Pay specific attention to the State Grade Levels and Sequence numbers assigned to Grade Levels in the grades tab. The Sequence is what drives the grade level roll of your students in the steps following the calendar roll. Grade levels with sequence "0" are ignored.



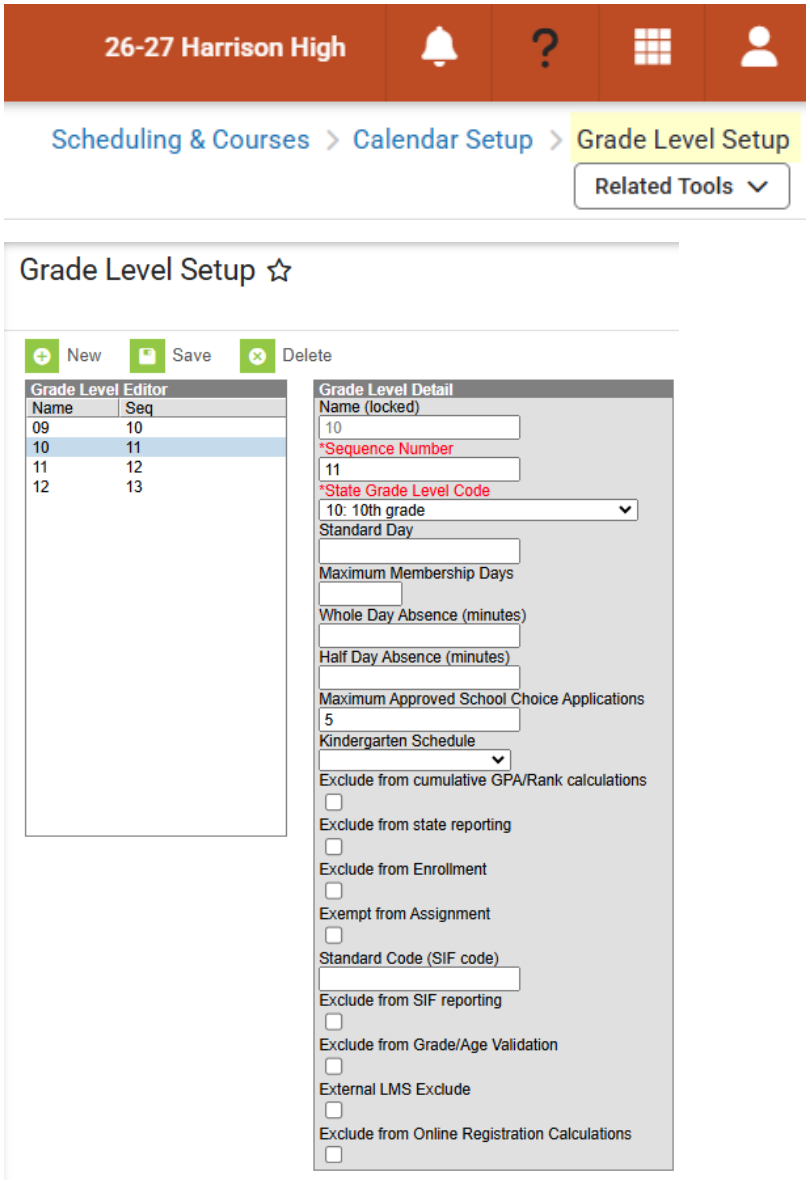




Clean your new Calendar data elements (Ctd.)

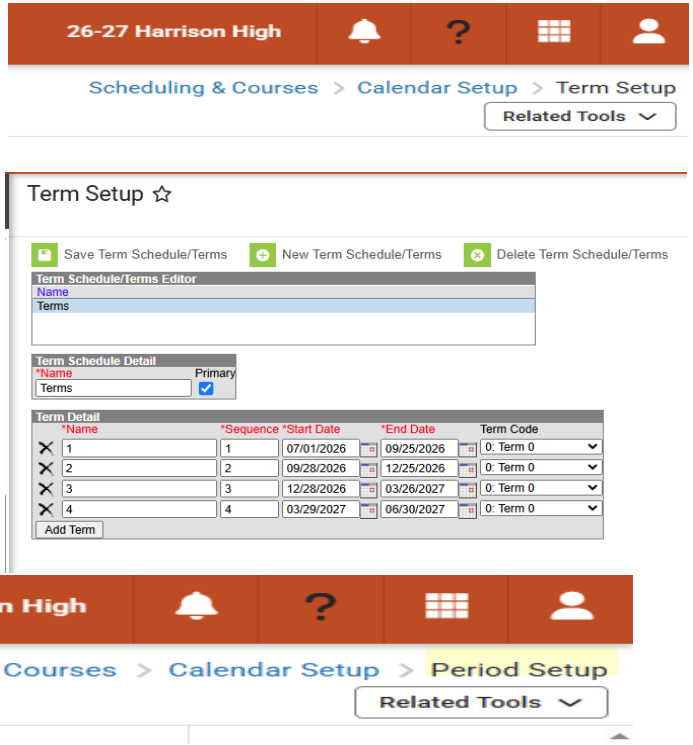
- When marked, the grade level can be assigned to the calendars for reporting purposes (e.g., recording 8th grade transcript records for high school credit), but students cannot be enrolled into this grade level.
  - The grade level DOES NOT display in Enrollments (Census, Student Information) or Student Locator.
  - The Enrollment Roll Forward process DOES NOT roll students into this grade level.
  - School Choice DOES NOT allow applications or processing for this grade level.
- For a full list of reports where this grade level will not display, go to:

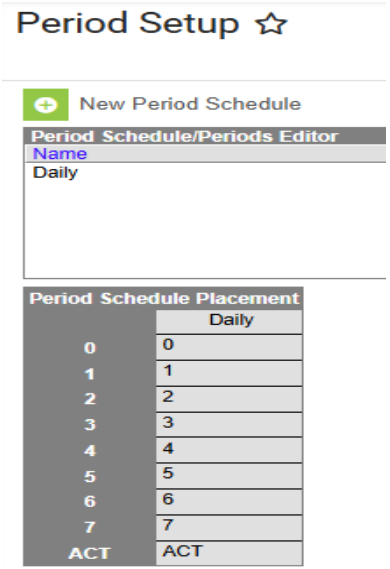
https://kb.infinitecampus.com/help/grade-levels

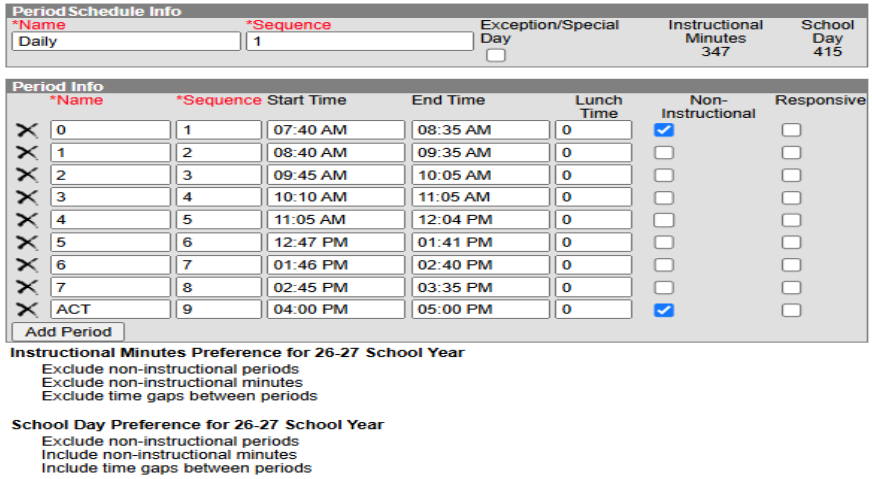


Clean your new Calendar data elements (Ctd.)

- Change your term dates to dates that occur within the new school year. Estimated dates are OK. These do not have to be exact until the first day of instruction.
- Alter your period times, schedules (rotation), and instructional preferences if necessary.



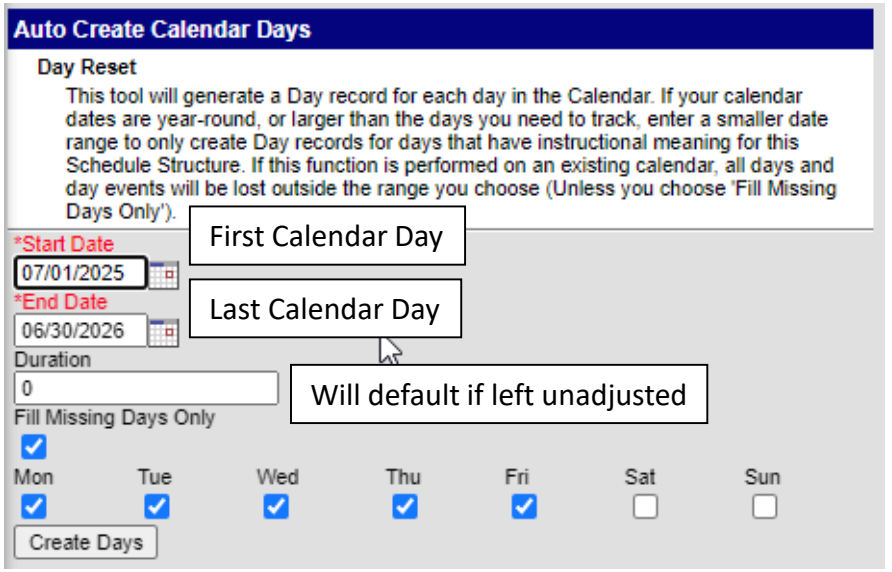




Clean your new Calendar data elements (Ctd.)

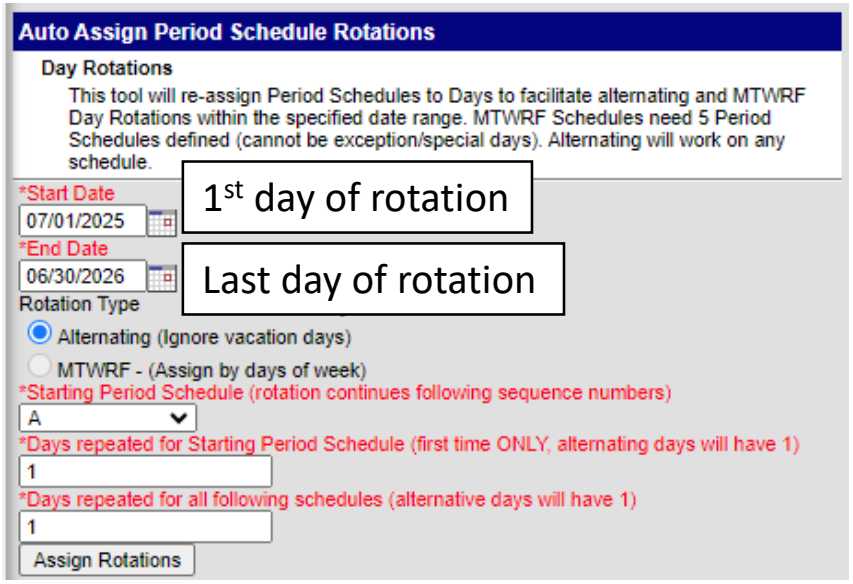
Create Days:

- Scheduling & Courses > Calendar Setup > Day Setup > Day Reset Tool
- Estimated dates are OK. Individual days may be added or removed, these do not have to be exact until the first day of instruction. Check days as School, Instructional, Attendance. However, if you have the exact information available, you may edit the individual holidays on the calendar at this time.



Rotate Days:

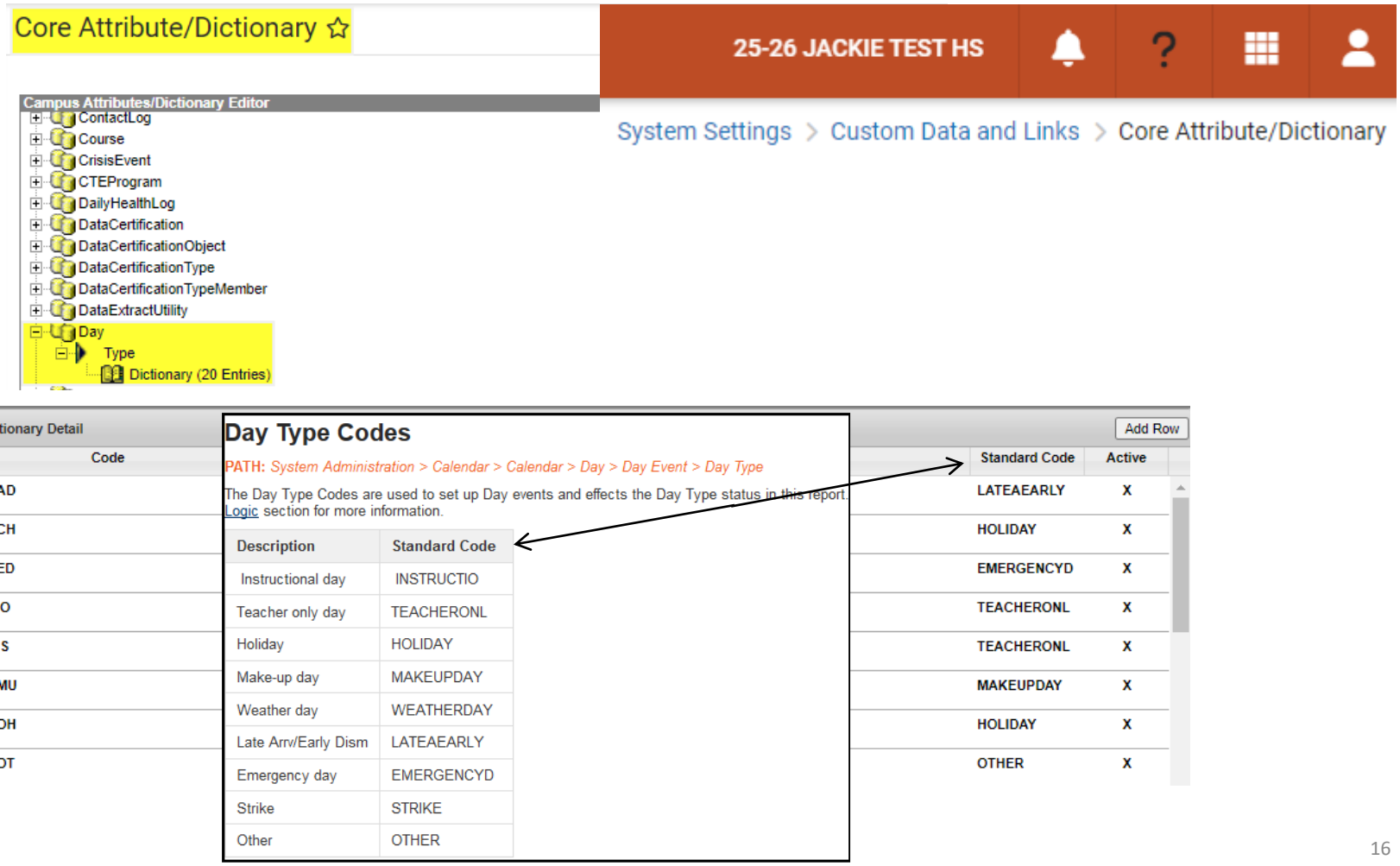
- Scheduling & Courses > Calendar Setup > Day Setup > Day Rotation tool
- Rotate the days using your estimated day schedule. Rotation will need to be reset at a later date if your actual calendar dates are not yet determined. However, rotation must be completed for proper course/section schedule placement in the schedule trials. Period Schedules MUST be named MTWRF for Campus to recognize days of the week.



Check your Day Types for Reporting

- System Settings > Core Attribute/Dictionary > Day > Type > Dictionary
- Make sure your Day Types match the Standard Code field as depicted in the Day Calendar Extract Report specifications.

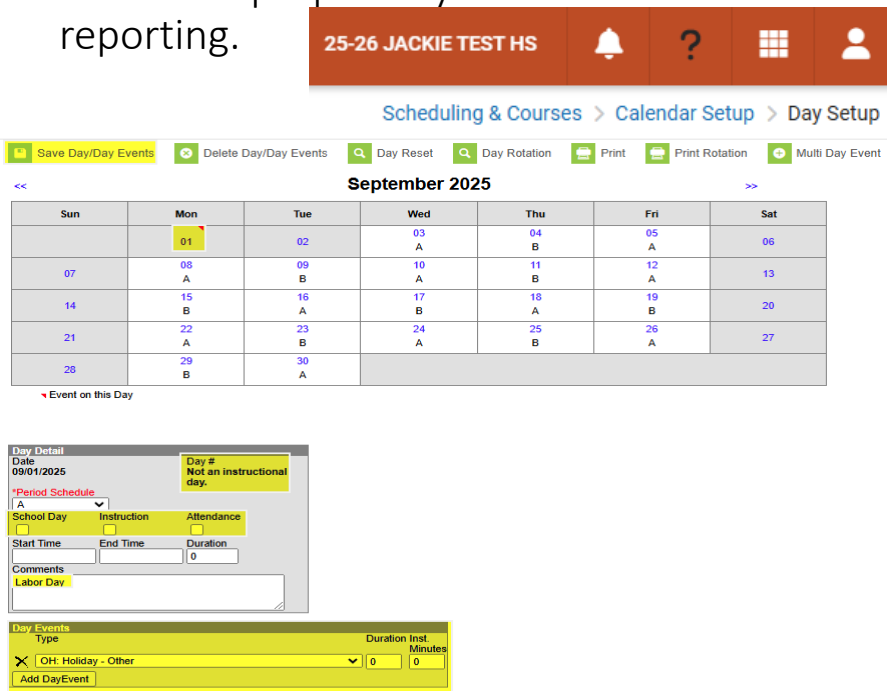
  https://kb.infinitecampus.com/help/sirs-day-calendar-new-york



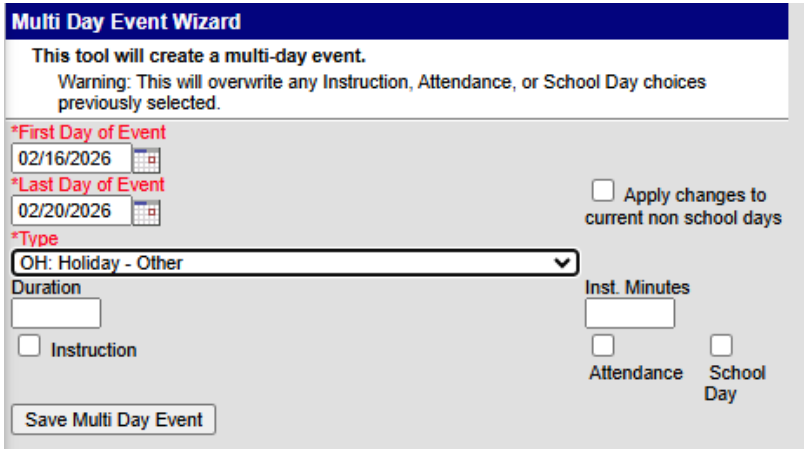
When finalized district calendar is available

Change the detail of a Single Day:

- **Scheduling & Courses > Calendar Setup > Day Setup > Click on Date**
- In Day Detail, alter the School Day/Instruction/Attendance check boxes as needed, and click Add Day Event.
- Select the proper Day Event Code for state reporting.



- Change the detail of multiple days
- Day Setup > Click "Multi Day Event"



- Fill the dates, remembering that a Campus "day" runs from 12 a.m. to 11:59 p.m.
- Add the day Event Type
- Alter the School Day/Instruction/Attendance check boxes as needed.
- Instructional Minutes on a day event will SUBTRACT that value from the calendar report's minutes, but will not affect attendance taken on that day in any way.

Save as needed, and verify that days are set properly by running the Day Calendar extract. **Reporting > NY State Reporting > SIRS Extracts > Day Calendar.**

Update Term start/end dates as necessary. Scheduling & Courses > Calendar Setup > Calendar Information > Term Setup.

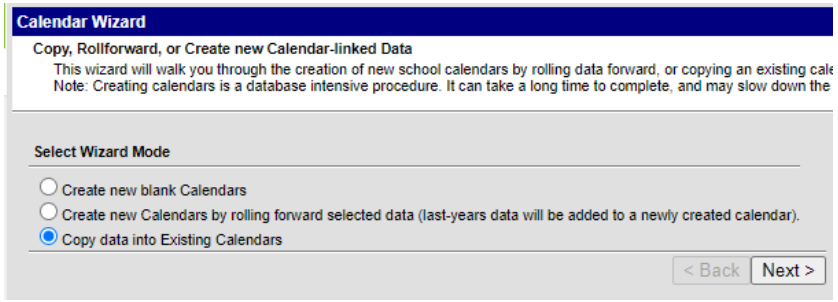
Use the Copier to Sync similar Calendars

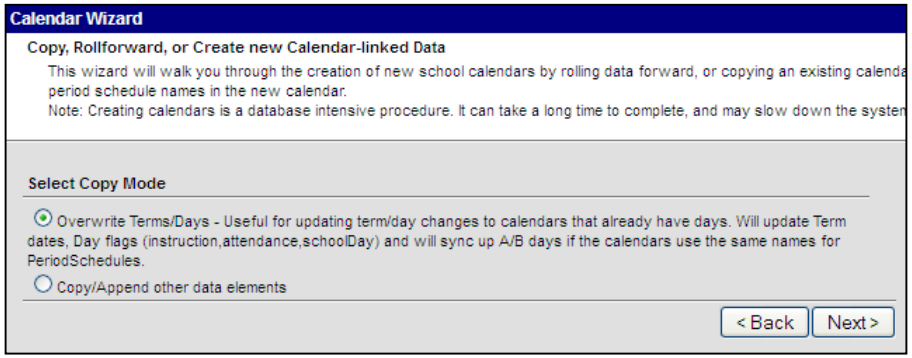
- Once you have a single calendar set, you can copy the updated data to calendars with matching schedule and period structures (i.e. multiple elementary schools using the same day/period rotations, or secondary schools on the same rotation.)

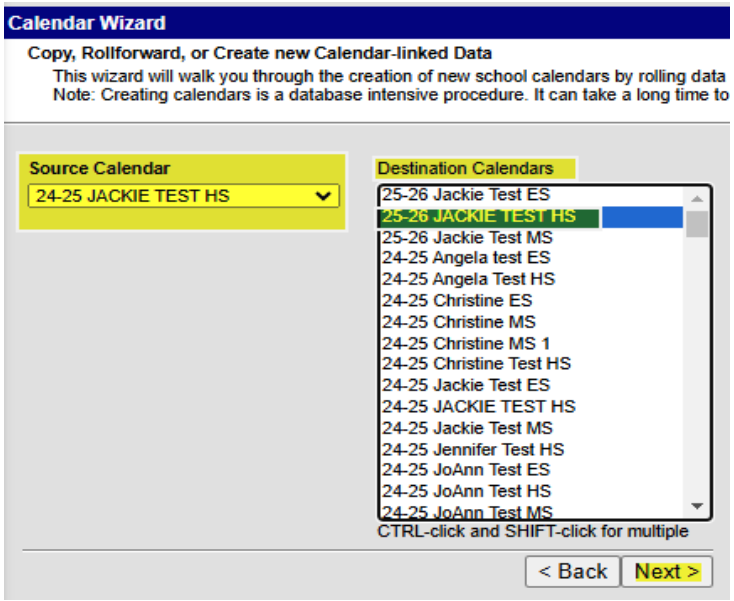
Scheduling & Courses > Calendar Setup > Calendar Wizard

<u>Copy data into Existing Calendars:</u>

- Click Overwrite Terms/Days to "sync" like calendars, Next, select the recently updated calendar as the "source" and click all similar calendars for destination. Click Next, and select Term Schedules, Days (any other previously un-copied data will be "selectable" at this time also) and click Run Wizard.



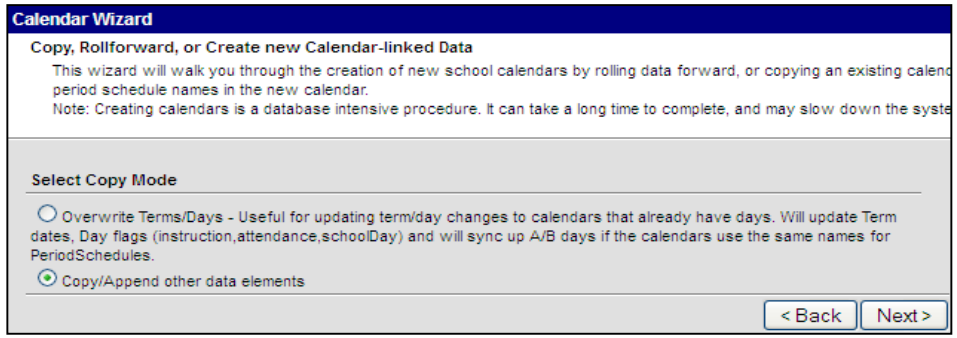


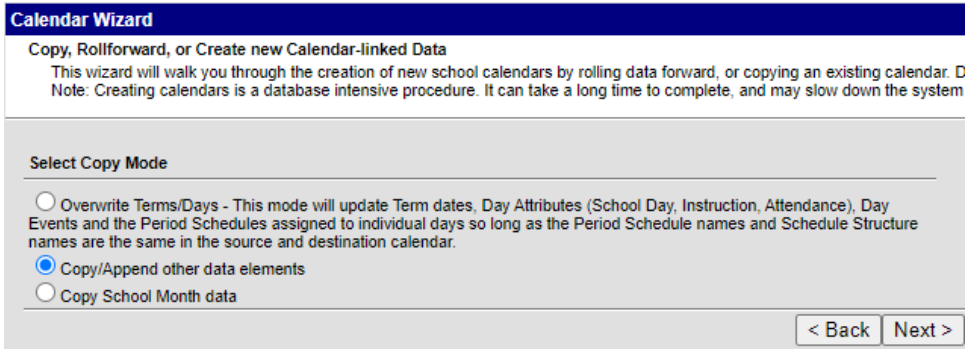


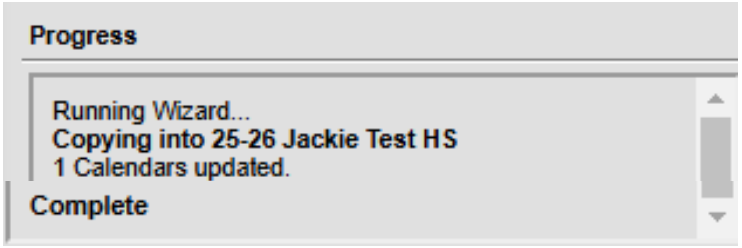
Copy data without Terms/Days

- To copy data not directly related to the terms and days (for example, teacher and room placement,) select Copy/Append other data elements. Select source and destination calendars, and select the items to be copied.

- If there is a conflict after clicking Run Wizard, there will be a specific error message in the window. These are usually messages stating that creation of a duplicate record has been attempted, or that the calendar structure does not match from source to destination. If there are problems overwriting data (i.e. a section can't be copied because its course doesn't exist,) you will receive zeroes in the progress window. Verify your data before re-attempting.

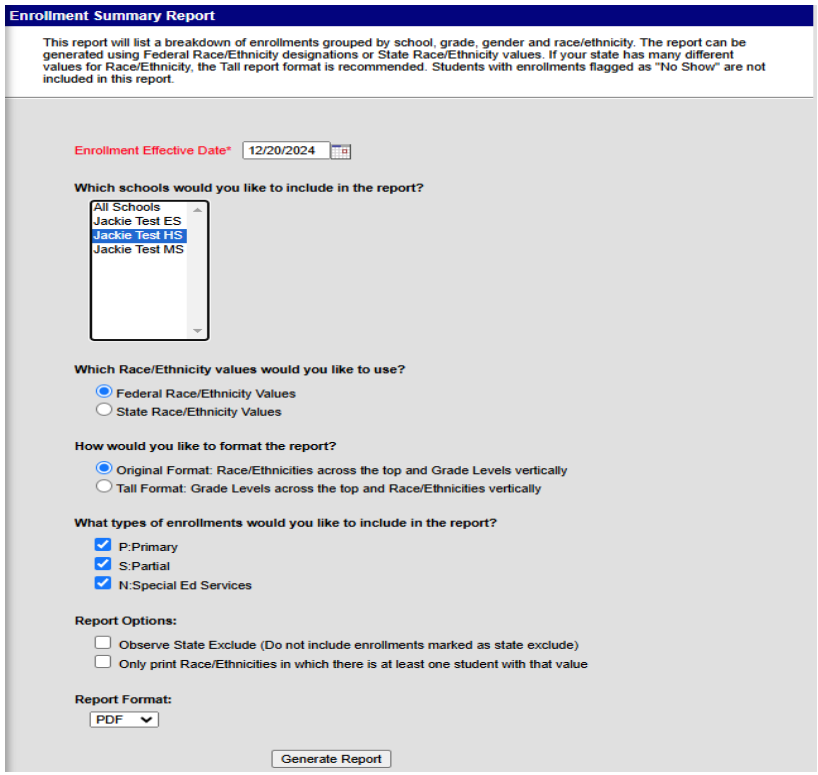






Moving Students into the New School Year

- Enrollment records, like calendar data, can be rolled forward from the current school calendar into the next school year. Before running the Enrollment Roll Forward tool, run an Enrollment Summary Report, found under ***Student Information > Reports > Enrollment Summary Report,*** so that you can verify the total number of students enrolled in current year and how many are expected to roll into next calendar at each grade level.



24-25
Jackie Test HS

Generated on 11/20/2024 09:34:07 AM Page 1 of 1

Student Enrollment Summary Report

Effective Date: 12/20/2024 Enrollment Types: P, S, N
Total Race/Ethnicities: 2 of 7 Total Schools: 1
Race/Ethnicity Source: Federal Male/Female/Total: 5/7/12

Student Population by Race/Ethnicity and Grade Level (Male/Female/Total)

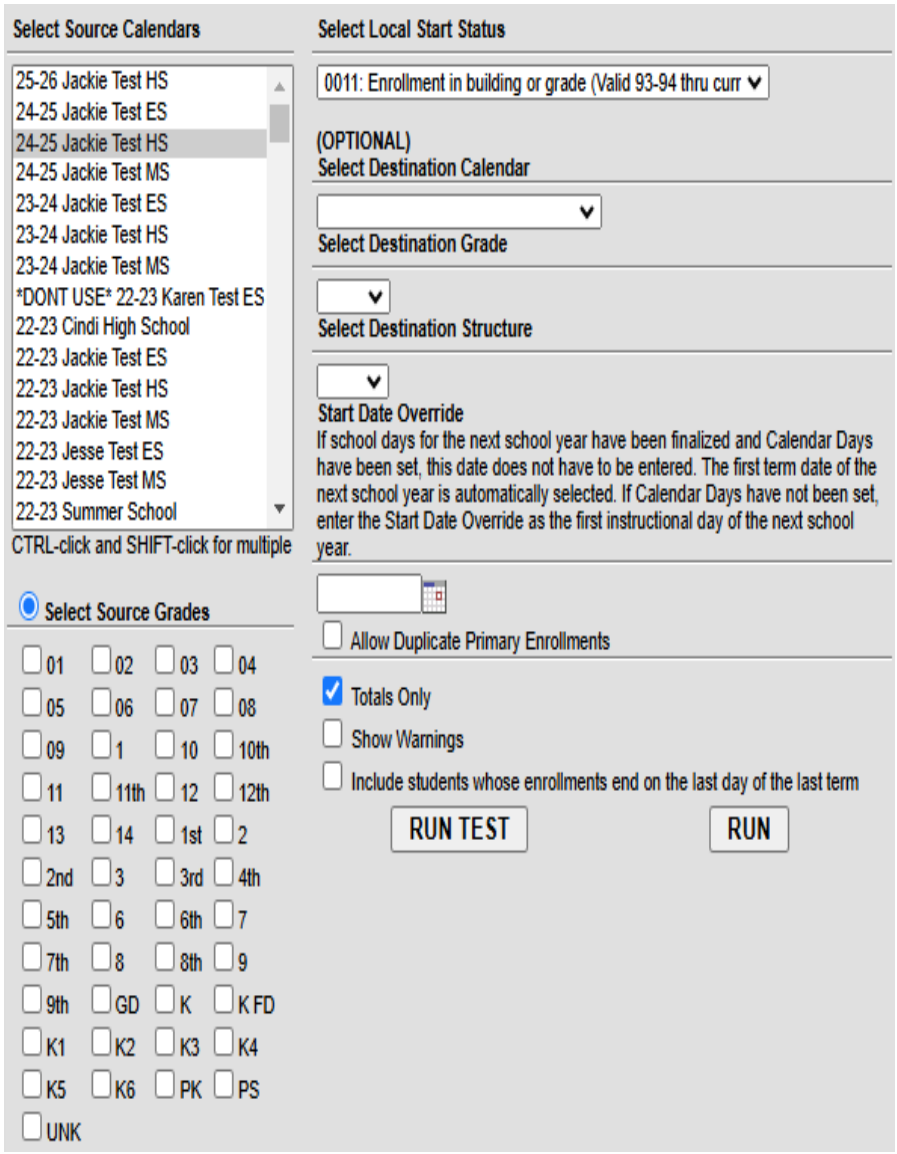
Jackie Test HS

Grade	1:Hispanic/ Latino	2:American Indian or Alaska Native	3:Asian	4:Black or African American	5:Native Hawaiian or Other Pacific Islander	6:White	7:Two or more races	Undefined	Total
09	2/0/2	-	-	-	-	2/4/6	-	-	4/4/8
10	-	-	-	-	-	-	-	1/2/3	1/2/3
11	-	-	-	-	-	0/1/1	-	-	0/1/1
All Grades	2/0/2	-	-	-	-	2/5/7	-	1/2/3	5/7/12

Enrollment Roll Forward

Student Information > General Student Administration > Enrollment Roll Forward Wizard

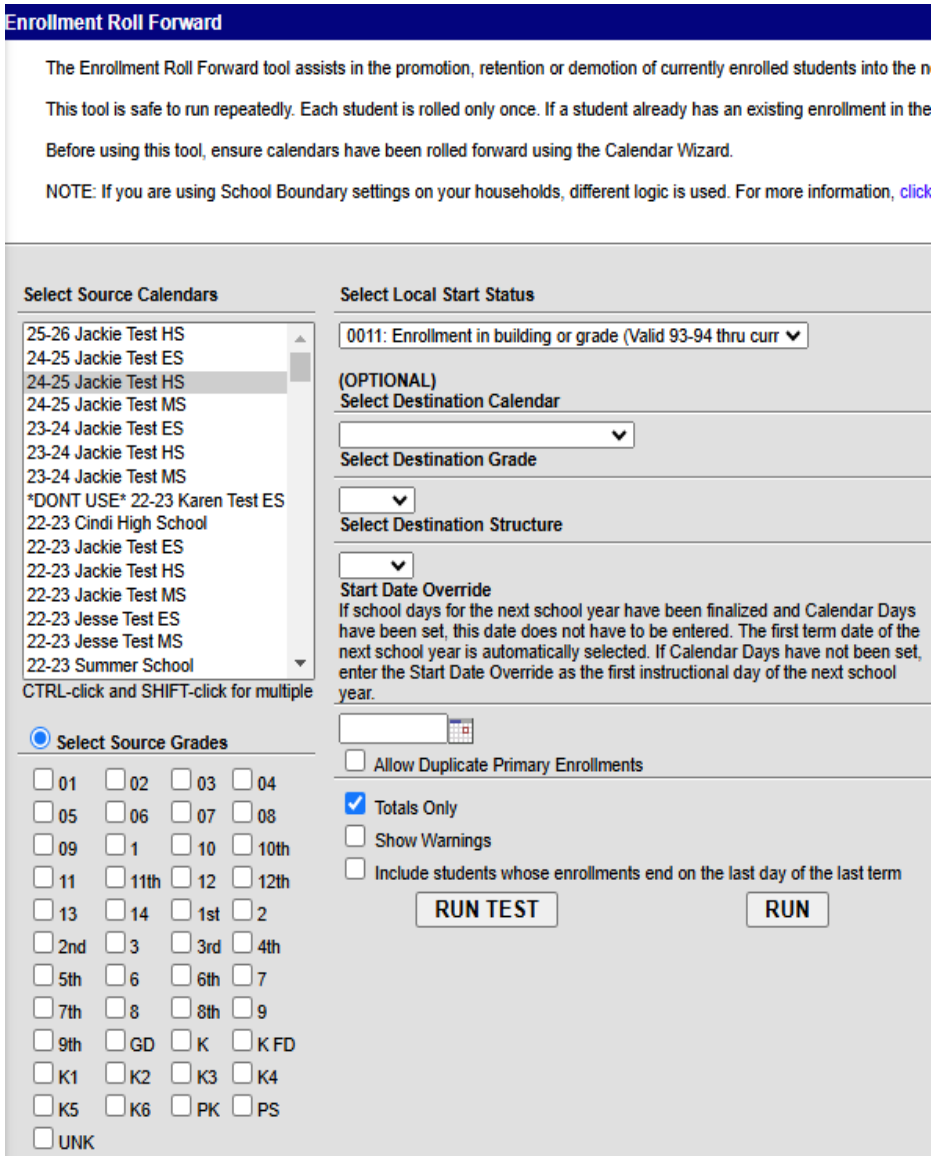
- Student enrollment roll may be run multiple times. Previously rolled students will not receive a duplicate enrollment record.
- Students marked with a Retained or Demoted end-action in their enrollment record will be ignored and not moved forward.
- Do not end enrollments prior to rolling students forward. If an enrollment has an end date, the Enrollment Roll Forward will not create a new enrollment record for that student. *
- Make sure that your grade sequence numbers in your calendar grade levels are correct.
- If you are using School Boundaries (**Census > Addresses > School Boundaries** Tab) the School Tab must be filled in or the students will roll to incorrect school (do not pick school – the last enrollment grade level will roll forward correctly.)
- Set Next Calendar, Next Grade on the student's current year enrollment for those who will NOT roll forward by grade sequence or school boundary.



*There is a check box to "Include students whose enrollments end on the last day of the last term".

Enrollment Roll Forward (Ctd.)

- Select a Source Calendar: Students in multiple calendars may be rolled at once, but make sure to have the Enrollment Summary for all students in those calendars.
- Select Source Grades: Multiple grade levels may be rolled, or one at a time.
- Students may also be rolled from ad hoc sources, however, they must qualify within the calendar header's selection.
- Select a Service Type: Most districts enroll students as Primary, and you can verify through Ad Hoc or roll all three types to ensure all students are rolled.
- Select a Source Structure: Even if your calendar only contains one structure, this must be selected.
- Select a start status: 0011 is the most common.
- You may select a destination calendar to guarantee your students are moving to the correct location. You do not have to select a destination calendar if:
  - You are using school boundary settings and students are already directed toward the proper building
  - Your grade level sequences are set properly and students will move to the next sequence.
- You may select a destination grade level, but only if you are rolling one grade level at a time.
- Select a Destination Structure: Even if your calendar only contains one structure, this must be selected.
- ENTER 07/01/20XX for the new year in your Start Date Override. The default date is incorrect per NYS SIRS instructions.



Enrollment Roll Forward (Ctd.)

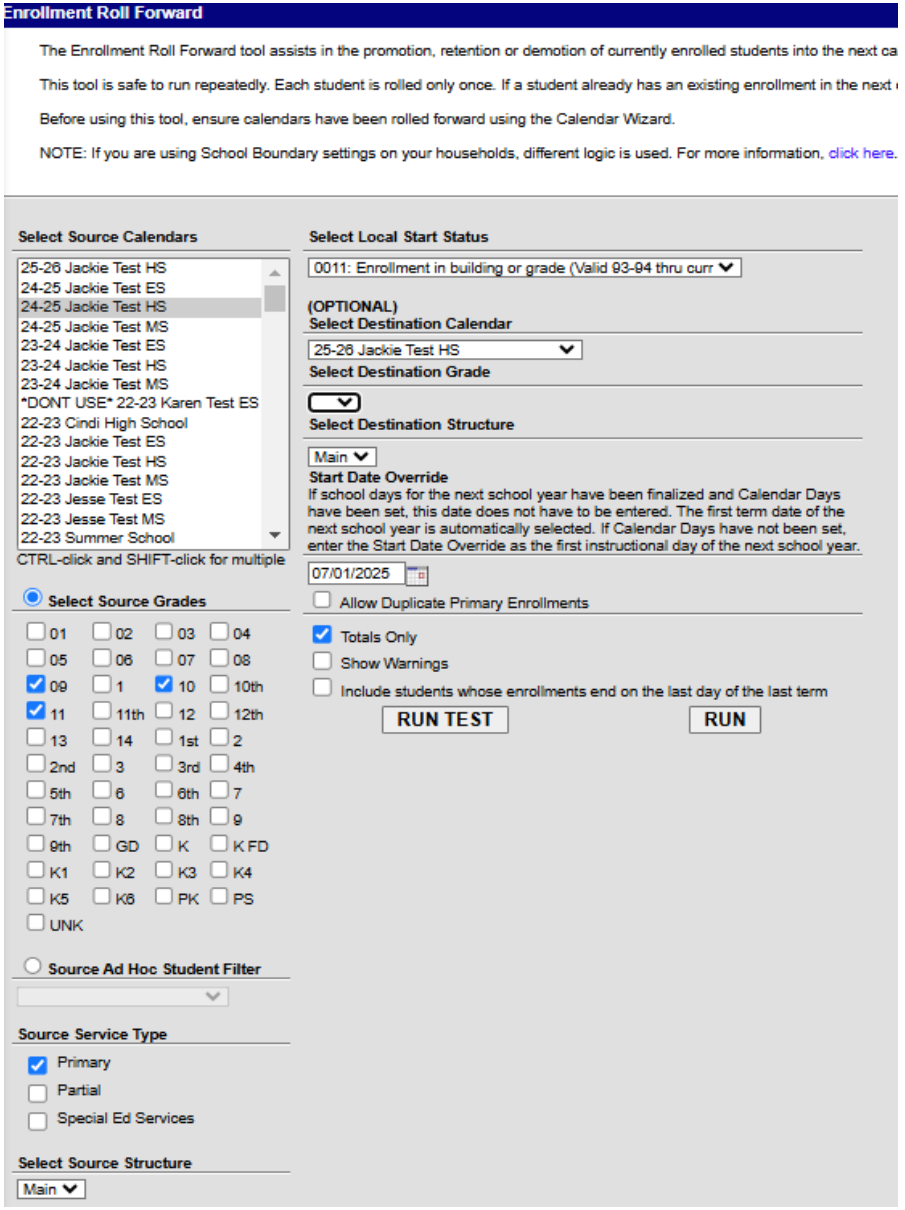
- Allow Duplicate Primary Enrollments is a district administration preference - check accordingly.
- Totals Only will group your roll results by grade level. If this button remains unclicked, you will see the name and grade level of each student included in the roll, and this will slow the process.
- Show Warnings will let you know if your selections aren't specific enough (i.e. two buildings offer the same grade level and School Boundary is not in use).
- Include students whose enrollments end on the last day of the last term will locate students who have an end enrollment already set for the last day of the school term.
- ALWAYS RUN TEST FIRST
- Compare roll totals to your Enrollment Summary.
- Only proceed if your totals can be verified as accurate.

Enrollment Roll Forward - Test Mode

Destination Calendar/Grade

24-25 Jackie Test HS 09 rolled to 25-26 Jackie Test HS(Main) 10 Students: 22
24-25 Jackie Test HS 10 rolled to 25-26 Jackie Test HS(Main) 11 Students: 3
24-25 Jackie Test HS 11 rolled to 25-26 Jackie Test HS(Main) 12 Students: 1

* Student's enrollment ended on the last day of the term



After Enrollments are Rolled

- Once the new calendar has been created and students have been rolled in, you must be sure to keep up to date with any changes in enrollment that occur in both the current year and the new year.
  - If a student leaves the district and a schedule has been created for this student, delete the upcoming year's requests and schedule before the next year's enrollment is deleted. This will prevent "ghost records" in your seat count for scheduling trials.
  - If a new student enters the district after the rollover, an enrollment in the new calendar should be created so that the student may be scheduled in the trials for the upcoming year.

- Clean up courses
  - Inactivate any course not offered in new year
  - Create necessary new courses

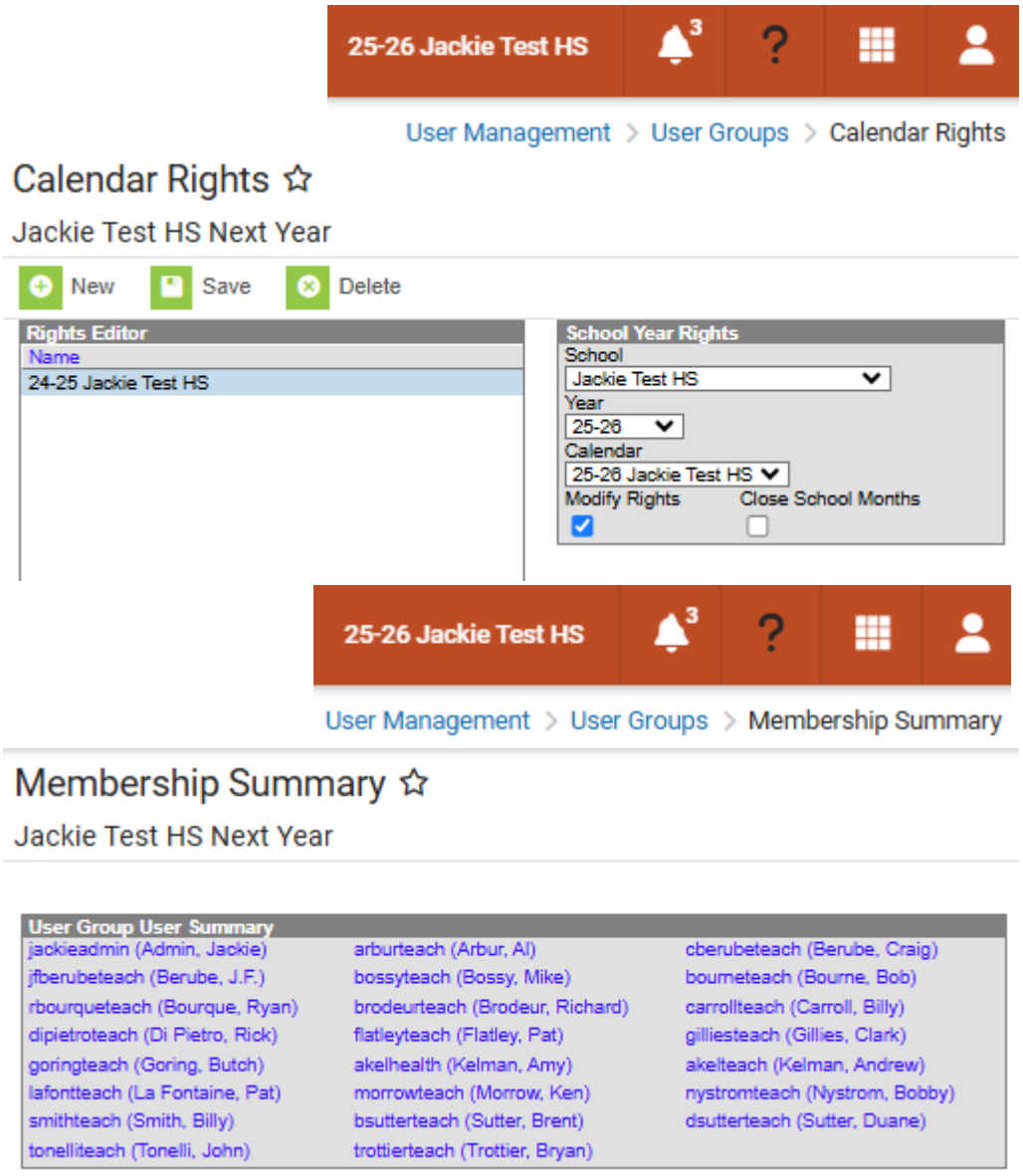
- If allowing Campus Portal Course Request Registrations, open in System Settings > Portal Preferences > Portal Display Options > Course Registration.

- If using Academic Planning (Grad Planner/Course Recommendations) open in System Settings > Portal Preferences > Portal Display Options > Academic Plan, then select "Enable..." and rule elements as needed.

- Review the "next year" calendar group memberships for accuracy, and then point the "next year" group to the newly created calendar.

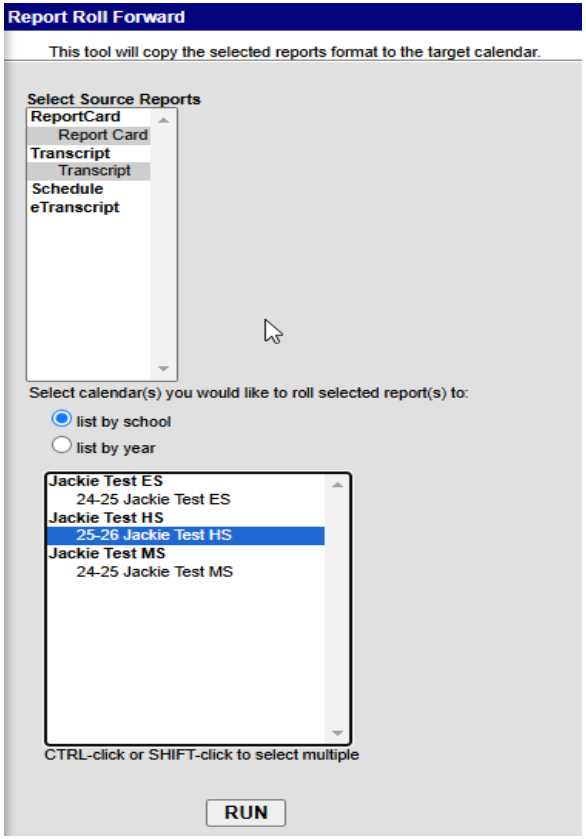
Calendar Rights to the New Year

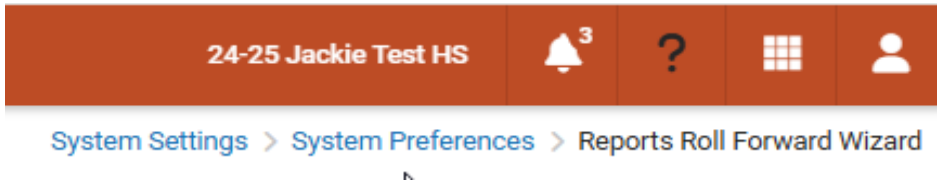
- Search > User Group > [Calendar Name] Next Year
- Click to Membership Summary Tab, make sure users are appropriate.
- Point School Year Rights to the new calendar.
- Administrators, Schedulers, and Registrars should have access to the new year for Enrollment and Scheduling purposes.
- Modify Rights allows users to work within the calendar (unchecked Modify Rights means “read only”).
  - Close School Months doesn’t apply to NY.



Report Roll Forward

- System Settings > System Preferences > Reports Roll Forward Wizard.
- Set calendar header to “roll from” year, select the target calendar to “roll to”.
- The Report Roll Forward tool will copy selected reports created in Report Preferences and move them into your new calendars. This eliminates the need to recreate the same reports in multiple calendars.
- For conventional templates, review each rolled template to ensure Report on Terms check boxes are filled. For standards-based templates, select Terms checks or score “grade” options.





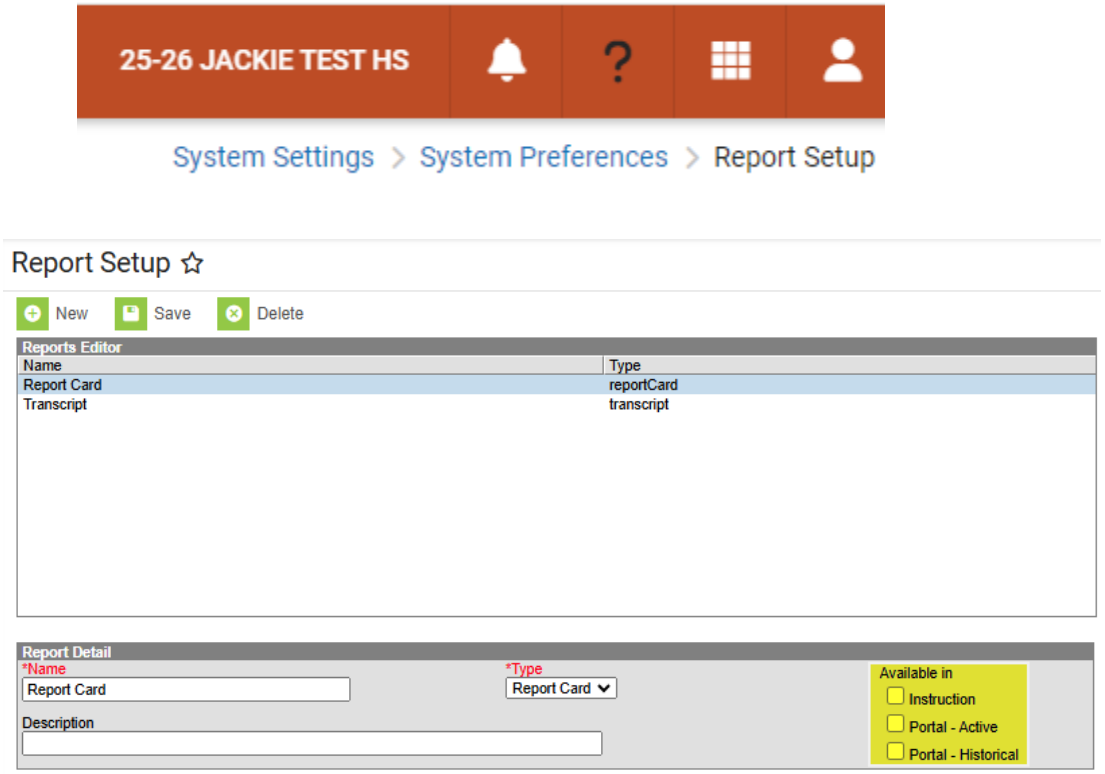
Reports Roll Results

The following 2 reports have been rolled forward:

Report Name	Target Calendar	Type
Report Card	25-26 Jackie Test HS	reportCard
Transcript	25-26 Jackie Test HS	transcript

Report Preferences Tip

- Once the reports have been rolled forward, you may want to remove "Available in:" checkboxes in the new year's **System Settings > System Preferences > Report Setup** area.
- This will prevent the display of schedules once the new school year is activated.
- Deactivating the report card display will prevent the teacher name from displaying on any canned report card templates, also.



Have Questions? Need more help?

Campus Community is a great resource!

https://kb.infinitecampus.com/help/school-year-setup

https://kb.infinitecampus.com/help/calendar-wizard-a

https://kb.infinitecampus.com/help/terms

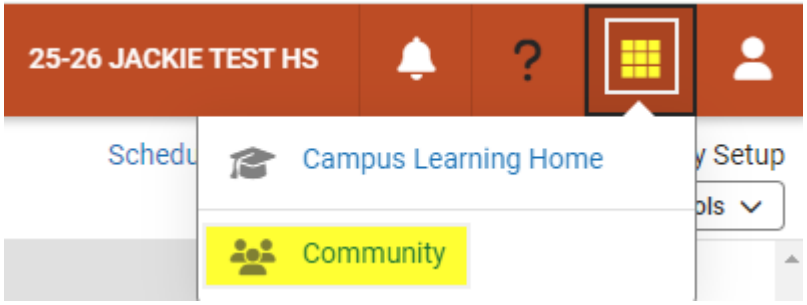
https://kb.infinitecampus.com/help/periods

https://kb.infinitecampus.com/help/day-setup

https://kb.infinitecampus.com/help/enrollment-roll-forward

https://kb.infinitecampus.com/help/report-roll-forward

Click the Campus Community link in your Campus header, and search the Knowledge Base.



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